Master Thesis

City Branding
The perception of Milan as a World Fashion Capital.

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Name	**Karolina Jedras**
Student number	**324055**
e-mail address	**karolina.jedras@gmail.com**
Supervisor:	**Dr. Erwin Dekker**
Co-reader:	**Dr. Christian Handke**

Abstract

In the 21st century, fashion is a significant part of the creative industries and an important contributor to the economical development of cities. Moreover, the projected reputation as a fashion capital is strongly related to the potential benefits of cultural and educational tourism, increase in investment and prestige of a city. The idea of the fashion city is multidimensional, and it is difficult to present the key characteristics by which a fashion capital can be defined. The multidimensionality of the concept leaves it open for interpretation and development of specific sources of competitive advantage in this area. In fact, in many world fashion cities, public authorities have begun to give increasing significance to their own place positioning in a global hierarchical structure of fashion cities, aspiring to become number one - the fashion capital of the world (Gilbert, 2006). City boosters and planners attempt to implement branding strategies in order to enhance a city 'fashionable' reputation and contribute to the city's economical development. In order to do so, they utilize various branding channels, and attempt to shape brand identity into a more recognizable brand image.

The purpose of the thesis is to answer the question of what is the relationship between Milan's anticipated identity as a world fashion city and the image of the city as a fashion capital among international students (education tourists). In order to examine the effectiveness of shaping urban identity into city's image various branding attempts initiated by the Milan City Administration will be analyzed. Among the researched branding channels are promotional events linked to fashion like Milan Fashion Week, fashion fairs, artistic and cultural events linked to fashion open to the wider public, existence of internationally renowned fashion brands and specialized retail districts.

Key words: City branding, Fashion, Milan, Fashion Capital, brand identity, brand image, Milan Fashion Week, Fashion Fairs, retail clusters, international students in Milan

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Introduction

The global competition between cities has been a major driving force that contributed to the development of the concept of the fashion capital, originating in the 19th century with the promotion of Paris as a world hub of style (London College of Fashion, 2005). In the 21st century, fashion is a significant part of creative industries and an important contributor to the economical development of cities. Moreover, the projected reputation as a fashion capital is strongly related to the potential benefits of cultural and educational tourism, increase in investment and prestige of the city. The idea of the fashion city is multidimensional, and it is difficult to present the key characteristics by which a fashion capital can be defined. The multidimensionality of the concept leaves it open for interpretation and development of specific sources of competitive advantage in this area. In fact, in many world fashion cities, public authorities have begun to give increasing significance to their own place positioning in a global hierarchical structure of fashion cities, aspiring to become number one - the fashion capital of the world (Gilbert, 2006).

This thesis focuses on Milan's image as a World Fashion Capital reflected in the city's perception as such by international students. Although, in almost every Italian city there is a high degree of elegance, sophistication and an emphasis on a fashionable lifestyle, Milan is the most important among these cities when it comes to the fashion industry. The city is not only recognized in Italy but also around the world. Milan is one of the leaders in the modern system of clothing with regards to manufacturing and consumption. The city is home to the world renowned fashion brands, fashion and design universities, and the center of fashion trends. Moreover, Milan is famous for fashion events, hosting one of the 'big four' fashion weeks.

All of above mentioned factors were recognized when in 2009 Milan was nominated as the 'Fashion Capital of the World' by the Global Language Monitor annual survey, surpassing New York which had been on the top for the previous 5 years (The Global Language Monitor, 2009). However, the global competition resulting in the fast evolution of the fashion systems has altered the privileged role of Milan in the world fashion order. The city struggles to maintain the competitive advantage it has gained throughout last decades and develops various branding

techniques in order to be perceived as a fashion capital among young people who have a certain vision of what a fashion city should offer.

The purpose of the thesis is to answer the question of what is the relationship between Milan's anticipated identity as a world fashion city and the image of the city as fashion capital among international students (education tourists). In order to examine the effectiveness of shaping urban identity into city's image, various branding attempts initiated by the Milan City Administration will be analyzed. Among the researched branding channels are promotional events linked to fashion like Milan Fashion Week, fashion fairs, artistic and cultural events linked to fashion open to the wider public, existence of internationally renowned fashion brands and specialized retail districts.

Moreover, to better address the main research question several sub questions will be addressed: Which of the branding channels are the most/least effective? In which areas Milan could improve in order to be perceived as a fashion capital? What is the overall evaluation of the shopping experience and shopping areas? What is the position of Milan among other Fashion Capitals? Is a status of fashion capital a main driver to come to study fashion in Milan? What is the relevance of fashion as a main concept associated with Milan? What is the difference in perception of Milan by people from different cultural/geographical backgrounds?

The thesis consists of two parts: theoretical and empirical. The first part focuses on an extensive literature review on Milan as a city of fashion and the issue of city branding based on ideas provided by such authors as Simon Anholt, Gregory Ashworth and Mihalis Kavaratzis. The empirical part will be based on qualitative analysis of brand identity articulated in the course of various branding channels and primarily quantitative analysis of brand imaged based on the surveys conducted among international students that came to Milan in order to study fashion related programs.

The thesis consists of 6 chapters. The first chapter is devoted to the rise of Milan as a fashion city. This part presents the processes occurring in Milan that resulted in the socio-economic modernization and physical transformation of the city, gaining international attention and recognition as a centre of the fashion system. The main focus is devoted to the historical, economical and geographical factors that contributed to the development of the competitive advantage of the city.

The second chapter presents the issue of city branding. Particularly, the evolution of the concept is presented along with its objectives. The chapter explains how branding the places differs from branding of psychical products and presents the difference between brand identity and brand image, the distinction that is important for the findings of this research. Moreover, the fashion market is explored as well as various approaches to branding the city though fashion. Finally, the pitfalls and challenges for successful branding will be discussed and concluded.

The third chapter is devoted to the methodological part, data collection methods and analysis. The chosen qualitative and quantitative research method will be explained and possible research limitations indicated.

Furthermore, the fourth chapter is related to the creation of brand identity reflected in various branding channels in the fashion industry observed in Milan. It mainly consists of the qualitative analysis of the documents released by the Milan City Administration. Additional information will be derived from other institutional websites, city guides, articles published online and participant observation.

The fifth chapter is based on analysis of the data gathered from the research conducted at Bocconi University in April - July 2010 of which the author of the thesis was a main collaborator and participant. The project 'An analysis of the perception of Brand Milano as a Fashion and Design Capital' is based on quantitative analysis of 304 questionnaires derived from the project for Commune di Milano. The appropriate data from the project is derived and re-analyzed in order to answer the research question.

Finally, in the last chapter the conclusions from the research are presented. In particular, the relationship between projected identity and the real image is explained in the context of the branding policy among international students. The chapter will conclude what the perception about Milan is in terms of promotional events linked to fashion, shopping experience, retails clusters, regarding Milan's position in relation to other fashion capitals and mental associations with the city. To finalize, the Milan's potential in terms of branding activities is indicated and recommendations for future improvements are presented.

1. Milan- the fashion city

1.1. The city profile- Fashion the soul of Milan

Milan, the capital of Lombardy is the second largest city in Italy with the population of 1, 3 million people and an area of 2,370 km^{2,} which makes it the most densely populated region in Italy (Demographia, 2010). The city has been for a long time an industrial center of Italy and a major contributor to the country's GDP, due to its positive impact of labor productivity and a high employment rate (OECD, 2009). Moreover, Milan is referenced as one of the leading global cities due to its strong international and cosmopolitan reputation; according to Istat data bank (2010), 13, 9 % of the populations are foreigners. The rapid growth of Milan and its position as one of the Italy's most European and world oriented cities contributed to its selection as a host of EXPO 2015.

The Lombardian capital is home to various interlinked creative industries like apparel, clothing and accessories, arts literature, footwear, media, publishing, high end designer furniture, interior design and other design activities. Nevertheless, fashion is probably the most closely associated with the city and its manufacturing tradition (Jansson&Power, 2010). It can be argued, that fashion is an essential feature of the city, it is a part of urban lifestyle, reflected in the way people dress, behave and spend their free time. Milan's urban life has an experimental aspect which is tightly connected to vitality and the level of sophistication of the place where the products are sold (Reinach, 2006). The city is renowned for clothes and shopping due to the quality and diversity of the products it offers, and a great amount of boutiques, flagship stores, restored palazzo and *maisons* of the great fashion designers. There are the headquarters of the largest fashion companies like Armani, Versace, Prada and Dolce& Gabbana. Moreover, the city is hosting Milan Fashion Week, one of the most important world fashion events, which occurs twice a year, for the Autumn/Winter and Spring/Summer seasons. Importantly, there are many fashion schools and universities in the city, like Insituto Marangoni, Domus Academy or Milano Fashion Institute, to name a few.

Generally speaking, there is a mutual relationship between the fashion and the city. On the one hand, fashion in Milan 'breathes cosmopolitan air'' and has the entire infrastructure

needed for its development (Fabris, 2002). On the other hand, it also influences the city, its surrounding, lifestyle, and rhythm.

1.2. The rise of Milan as a Fashion Capital - a historical perspective

1.2.1. From the beginnings of the city to the Industrial Revolution

The history of Milan is strongly related to the heritage of production of clothing and the overall development of the Italian style. From its beginnings that reach back to 400 BC, the city was the main area of settlement of Celtic insurbes, the founders of the city, with close ties with other European cities. Around two centuries later, the city was conquered by Romans under the rules of which it developed from a military base to a capital of the empire and the center of multiple territorial systems (Goldstein&Caprarella, 2002). Over the following centuries Milan underwent several transitions, being under the rules of various strengths. During the Middle Ages, Milan was the iron, steel, and the textile city at the head of technological advancement, developed manufacturing and trading systems recognized in the international arena (Goldstein&Caprarella, 2002).

The reputable position of Milan was reinforced under the rules of the Visconti family (1277-1447) that brought wealth and glory to the city, especially through territorial expansion. Later on, the rules of Sforza lords (1450-1535), which coincided with the Renaissance period in Italy, brought magnificence in the arts and literature. The family transformed the city into a powerful metropolis through the founding of many monumental buildings like Castello Sforzesco and Duomo Cathedral. Milan in that time was one of the greatest centers of arts and culture in Italy, the places of inspiration and creativity of such geniuses like Leonardo da Vinci and Leon Batista Alberti.

During the Renaissance period, the western world was characterized by a rapid change in terms of understanding of fashion. The word 'fashion' gained a new meaning - that of keeping up to date, modernity and following the trends (Goldstein&Caprarella, 2002). What is significant, it was Italian fashion that was dominating in Europe, and Milan was in its center. Young ladies paid great attention to the way they dressed, splurging on more and more extravagant dresses.

Expensive clothing and accessories served as peculiar status symbols and a mean to show off their power and authority (Giulini, 2002).

The illustrious times did not continue after the death of the last Sforza in 1535. During this time period, Milan went under the Spanish domination for 170 years. The contradictions between unfavorable economic cycles and the growth of international trade had detrimental implications for the fashion industry. Additionally, Italian style lost its position for the advantage of simpler and less sophisticated Spanish fashion. Furthermore, in the 18th century, the European wars lead to Austrian domination of the city. The rules of Habsburg dynasty had an ambiguous impact on all levels of the society, therefore Italians remained hostile towards Austrian rules (About Milan, Italy 2010).

The foreign rules and the harsh times they brought came to an end in the middle of the 19th century when in 1861 Milan was incorporated to the Kingdom of Italy (Life in Italy, 2010). The impressive was emphasized by the Industrial Revolution when the city acquired the features which two centuries later contributed to rise of Milan as global center of excellence in fashion. Milan became a central hub in Italian clothing manufacturing industry involving exports of finished fabrics and the incorporation of innovative manufacturing techniques, the factors that contributed to its competitive advantage (Goldstein&Caprarella, 2002).

1.2.2. The evolution of Italian fashion after the World War II

The first half of the 20th century was not of a major significance to the development of Italian fashion neither to the city's cultural nor economical grow. The real development of Italian ready-to-wear [1]has its roots in the post-war period, when Italian clothing industry capitalized on apparel technology imported from the US. After the World War II there was an increasing growth for the mass market for clothes, the final customer was looking for functional, durable, high quality garments. The business model of the Italian manufacturing firms developed in 1950s and

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[1] Ready-to-wear also known as *prêt a porter* was a result of the partnership between Italian designers and manufacturing firms. It is a seasonal business based on showing seasonally two main collections, the capsule collections and flash collections. The key success factor is the designer's reputation, which is a combination of creativity, image, opinion makers, marketing and good relations with international store buyers and international fashion editors (Corbellini&Saviolo, 2009).

was characterized by big plants, economies of scale and strong specialization (Corbellini&Saviolo, 2009).

The new era of ready-to-wear fashion was conceived on 25th February 1951 in palazzo Pitti in Florence. In this Renaissance palace, Gian Battista Giorgini organized a show for some Italian fashion houses with a very innovative look, inviting international audience, celebrities and press in order to catch wide attention. His effort garnered results, the show was an immediate success – American and European buyers celebrated the rise of Italian style (Corbellini&Saviolo, 2009).

The advent of 1960s brought many important events, like global revolution of young generation, social and union conflicts, the oil crisis and most importantly for the fashion industry- the end of mass market and the need for more informal wear, flexibility and product innovation. In Milan, the mid 1960s was the time of opening up, cosmopolitism and experimentation with the arts and photography that contributed to the establishment of new trends in fashion. The central attempt to promote Milan as the center of Italian shows was the Milanovendemoda - a fashion trade fair first organized in 1969 (Reinach, 2006). Moreover, the productivity was decentralized and new forms of business models like subcontracting and licensing emerged.

1.2.3. The characterization of Milan as a capital of *prêt a porter*

The 1970s were a turning point in the history of modern fashion. Its international commercial success originated by the shifting focus from the domestic production towards the global fashion markets and ready-to-wear collections. Milan was in the center of this process and its success was strengthen due to the merge of the design and the industry-hub, it appeared that it suited better as a fashion capital then Florence (Reinach, 2006). In the beginnings of 1970s Milan was already the center of trade in fashion from the geographical and cultural points of view. However, the real categorization of Milan as a fashion capital and the home to Italy's most prestigious events took place in the period between - 1972 when fashion designers moved their shows from Florence and 1978, when men's ready-to-wear fashion was placed in Milan. The period was characterized by the rise of many significant institutions like Idea Como- the union silk of producers (1974), Federtessile- the organization that groups together the textile associations (1975), and Modit- founded by Beppe Modense -the institution that regulates

mechanism of fashion shows (1978) (Reinach, 2006). In the second half of 1970s, *haute couture* lost its popularity and its distinctive feature and Milan took over the position of Paris in ready-to-wear industry. As noticed by Corbellini & Saviolo (2009), a shift of world fashion to a new center of significance in Milan proved a common desire among the people from the fashion business to interconnect with other actors through multiple networks.

1.2.4. From the emergence of Milanese fashion entrepreneurs to international success

As 1970s were the beginnings of the Milanese success in ready-to-wear fashion the 1980s were its peak. Milan recovered from the recession- and thanks to the spirit of fashion became 'a drunken Milan', an affluent, dynamic city rich in events – 'all marked by fashion and the world revolving around it' (Reinach, 2006:125). The period was characterized by many success stories of the most famous Milanese designers like Armani, Versace, Dolce and Gabbana.

Giorgio Armani on the cover of Time Magazine in 1982**.**

Milanese ready-to-wear became an established trend, granting a specific physiognomy of the city. Old Milanese families acquired the buildings and transformed them to their maisons; the building in via Brogonuovo belonging to Franco Marinotti and the Triva cotton became Georgio Armani headquarters, and Palazzo Rizzoli – Gianni Versace's head office. Moreover, beforehand underexploited districts such as Porta Genova, Bovisa and Porta Vittoria, improved thanks to the growing investment of fashion entrepreneurs in these areas. Fashion was not only reserved for the

wealthiest social classes but almost all of the city citizens were involved in the fashion culture (Reinach, 2006). The fashion shows dominated the Milan's stage and many fashion related events took place in the spectacular places like La Scala opera, the Brera Art Gallery or San Siro Horse Race Track. From the mid 1980s, the continuous financial growth was even more evident which could be observed in the growing internationalization of Milan, its population, the exports of Italian clothing abroad, the growth of demand and the revitalization of the products (Corbellini&Saviolo, 2009).

In the 1990s, the institutional fashion system dominated in the decades before fall, facing greater consumer awareness and independence. Consumers were increasingly more mobile and 'connected'; they were combining brands and products in order to express their personality and style. In 1990s Milan was different in comparison to the previous decade when democratic urban environment contributed to the emergence of young fashion designers. New upcoming creators have various career paths and distinctive success stories, for example the Milan born designer, Miuccia Prada didn't start their career in Milan but New York, being more international from the beginnings and producing 'elite, cerebral luxury' (Reinach, 2006:128).

On the other hand, there was a change of the environment - fashion was not seen as a status symbol and logos were not the main driving force for making the purchase. The period of emergence of mix and match- a fashion statement that mixes both mass produced and prestigious luxury products. Being fashionable equalized being yourself and expressing your own individuality. The new trends were expressed by street fashion, minimalism, and grunge. Luxury was related to exclusivity and craftsmanship (Corbellini&Saviolo, 2009).

Generally, the 1990s were the peak of vertical integration among firms, the rise of fashion conglomerates and multiband stores. The competition was shifted from 'total look' to 'total living' related to the fact that the fashion companies extended their brands to the new categories like accessories, furniture, fragrances or real estate. Leveraging of the products had many dimensions, from Versace Barbie Dolls, through Armani clubs to D&G-logoed car models and Bulgari Hotel & Resorts.

1.2.5. Milan since 2000- the challenges of the new era

The 21th century brought many changes in the fashion industry triggered by the polarization of the fashion system. To begin with, the fashion industries are more and more affected by increasing globalization and industrial restructuring. Among the most important transformations are the emergence of new markets for luxury goods, spread of location of production, outsourcing to lower cost regions from specialized production centers, competition from China, increased counterfeiting, and controversies around the meaning of the concept of *Made in Italy* (Reinach, 2006). Mass market is not a monolithic category anymore as the communication of new products has moved into the same area as in case of promoting prestige/luxury goods. The importance of image and the emergence of new tastes stimulated the point of offering which traded up on the quality and creativity. According to Reinach (2006) the best example of the polarization of the fashion system is the fall of the dominance of *prêt a porter*, and the rise of new fashion cultures like 'fast fashion'- a business strategy assumed by prominent specialty chains based on reduced product life cycle and a very efficient supply chain contributing to the fast turnover on the shelves. That is to say, the companies are able to make a garment with high fashion content very fast. European specialty chains such as Zara and H&M which capitalize on the 'fast fashion' model are growing 3 to 4 times faster in comparison to the slow-moving apparel industry in general (Corbellini&Saviolo, 2009).

The other significant transformation is the growing importance of 'masstige'- a retail category that includes brands and products that have high end, prestigious characteristics but with prices and locations that make them accessible to mass consumer audience. 'Masstige' is the result of blurring of the distinction between the luxury and mass market across many elements of the marketing mix. The brands in this category are based on 'aspirational effect', competing through development of a proper communication strategy, and upgrading the product status with the signature and testimonials of designers and celebrities, advertisement campaigns, creating artificially limited editions, being located in high traffic places and occupying a big retail space in order to increase their visibility (Corbellini&Saviolo, 2009).

Not only business models in fashion are shifting but also Milan's profile as a fashion city is evolving within the global scenario. Increasingly transnational fashion systems changed the privileged role of Milan in the fashion world order. Milan has to deal with the rivalry with other

fashion capitals like Paris, London and New York, but also face the overwhelming competition coming from Middle East, especially from China. What is more, as indicated by Reinach (2006) the overall image of *Made in Italy* is deteriorating; it can be observed that *Made in Italy* is not a given but more and more unstable and fluctuating concept. In order to maintain its position, Milan has to face the challenges brought by these transformations and find a proper way to position itself in the increasingly wider transnational networks of fashion capitals.

1.3. Milan's fashion economy

Fashion is considered as a most important ingredient of *Made in Italy* which acts more like an abstract concept than a label, defining the products that Italy specializes in and which involve a unique advantage in terms of innovation, style, service and price (Corbellini&Saviolo, 2009). *Made in Italy* is indentified with certain groups of goods, apart from apparel, the systems consists of such industries as cars, food, coffee and wine. In fact, the main part of *Made in Italy* production is related to consumer durable items, characteristic for the fashion product lines - clothing, shoes, leather goods, jewelry, hosiery, eyeglasses concerning also the raw materials and machinery necessary for its production. The fashion industry is externally oriented with the main focus on exporting the products. On the country level, the revenue from exports is estimated for 28,070 million euro. Moreover, fashion business creates a wide range of employment opportunities, in 2007, 513 million people were hired in fashion related jobs (SMI, 2010). The major cities focused on fashion retail are Milan, Rome and Florence; nonetheless Milan is a central hub of the economic networks of the Italian fashion system. It plays an essential part from a pure economic perspective as well as the central location of the city's creative production.

The presence of fashion in Milan has its direct and indirect effect, in relation to the turnover and general mobilization of the urban economy. The fashion related activities generate incomes and turnovers from various areas starting from furniture to clubs and restaurants, entrainment activities and hotels. Apart from being a center of fashion and design knowledge, the significant part of Milanese agglomeration focuses on production and manufacturing. Lombardy region which consist of such areas like Milan, Brescia, Bergamo, Como, Garda is the largest European clothing manufacturing cluster. The textile industries in the region employ circa

200 000 workers. Generally, in the Province of Milan, the fashion supply chain involves over 60 000 workers, with 6 695 production firms and 6 176 retail firms (including the textile sector). Milan's styling and design activities alone produce more than half of the national total turnover (EUR 535 million out of EUR 1 billion) (OECD, 2007). Moreover, the Milanese fashion industry itself involves 12 companies, 800 showrooms, 6000 sales outlets, over 600 firms are involved in interior design and there are 17 research institutes focusing on fashion and design (Jansson&Power, 2010). The presence of various fashion jobs is most evident in Milan, creators, designers, fashion editors, fashion photographers, models, their managers and escorts, public relations professionals, market analysts, trainers and researchers, all of them live in Milan although some people stay there just temporarily, with the connection of lifecycle of events (Pasqui&Goldstein, 2002). Milan, a hub of fashion business is working as a container of events due to its constructive environment for the exchange services, social and human capital and communication system between actors (Rita de, 2002). The ability to attract creative people to work in the fashion industry and the appropriate infrastructure are the factors contributing to the competitive advantage of the city.

As indicated before, Milan is a financial heart of Italy and fashion is one of its main points of strength. The role of fashion economy is linked to the excellence the city has built up during the decades. However, Milan's dynamics is not limited to the national level but should be regarded in the broad perspective international fashion systems. Other cities like Paris, London and New York, which are the leading actors in global fashion economy are increasingly developing and strengthening their own sources of competitive advantage. Thus the relevance of Milan for the fashion economy is strictly linked to the transformations and drivers of change in the globalized economy.

1.4. The geography of fashion in Milan- territorial production systems

Milan has one of the world largest concentrations of fashion companies, which has a big impact not only on city's economical advantage but also geography, surroundings, local networks or even communication system that is especially adjusted during the Milan Fashion Week. The association between location and industrial sector is reciprocal; on the one hand the place influences the prosperity of an industry located there, and on the other hand, an industry has an

impact on the place and its evolution. The fashion industry is a perfect example of this reciprocal relationship due to its dynamic presence in the city. Fashion changed the geographical image of Milan having a huge impact on the original city web (Bucci, 2002). Fashion companies are not randomly spread around the city; there are several main areas when the fashion industry is centered like Duomo/Vittorio Emanuele, Quadrilatero d'Oro, Brera, Ticinese/Navigli, Corso Buenos Aires, Via Paulo Sarpi or Isola. Milan metropolitan region concentrates small firms that specialize in high level functions such as industrial design. The fashion companies concentrate mainly in the center of Milan due to the proximity to particular type of knowledge coming from the universities and research centers and the existence in the vibrant, privileged, favorable environment for the spread of tacit knowledge especially profitable for the design and fashion industries. The spatial proximity of firms selling the same products and attracting the same type of consumers indicates the interrelation rather then dichotomy between competition and collaboration.

Milan's firms are not only geographically concentrated but also they have expanded close functional interactions. The report prepared by OECD (2006) indicates the assets that contributed to the development of Milan's fashion cluster like excellent organizational capacity of firms which is based in quality management and collaboration between design and production systems. Additionally, the networks of specialized companies created flexible production structure able to produce niche goods and adapt to changes. There is also a strong regional textile sector that supports designers with high quality raw materials and a constant flow of information. Crucial for the development of fashion clusters is the localization of specialized services like publishing and printing which is substantial to display products made in Milan around the world (OECD, 2006).

Whereas the showrooms and retail districts are based in the city, the 'rust belt' around the province is the place of industrial districts, 'the concentration of specialized industries in particular localities' (Marshall[2], 1969). This idea of industrial districts is often correlated to rapid industrial growth in Northern Italy and the development of clusters of small and medium size enterprises (SME) in the post war industrial history. These districts are located in a specific regions and posses explicit specialization profile. The examples of these districts are Prato (wool

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[2] The first theory of agglomeration economies came from Alfred Marshall who is regarded as an originator of modern urban economic theory. In his book, Principles of Economies included the chapter on "The Concentration of Specialized Industries in Particular Localities" (Martin & Sunley, 2003:435). Marshall considers the concentration of larger number of small firms of similar kind in the same locality and how it influences the division of labor. He describes an industry concentration in certain localities as a 'localized industry'.

and fashion), Como (silk industry) and Capri (knitwear), Tuscany (leather goods), Brenta (footwear) etc. Thousands of companies in these districts interact with each other in various ways and diverse stages of integration and competition but still in the same manufacturing sector. Industrial districts are one of the strongest points of Italian fashion system due to high levels of quality based on combining various skills, technological innovation and craftsman skills (Bucci, 2002:23).

1.5. Why Milan? – The sources of the competitive advantage in fashion

While examining the reasons of the Milan's competitive advantage in the fashion business, it is worth considering the variety of possible factors that contribute to locations' privileged position in such creative industries as fashion and design. Undoubtedly, the underpinnings of the competitive advantage are manifold and complex. Various researchers present multiple sources of place superiority in the particular industry.

According to Jansson & Power (2010), global competitiveness in fashion and design is based on the existence of local industrial systems for creative inspiration, product innovation, knowledge and learning; inter firm networks, labor possibilities, technology, specialized services and institutions and links to global commodity chains. Fabris (2002) claims that Milan is the economic center of Italian fashion due to being home to design and organizational headquarters. The 'clothing reality' is transferred into industrial production, although manufacturing does not take place in Milan but the areas around the city. The author emphasizes the importance of relationship between arts and fashion. In Milan, manufacturing world 'absorbs arts and creativity', what is evidenced by multiple artistic events organized in various fashion houses (Fabris, 2002:219).

The previous subchapters related to the historic, economic and geographical dimensions of fashion in Milan along with the considerations of the above mentioned scholars, indicate valuable sources of competitive advantage of the city. In order to explain the success of Milan four major factors can be pointed out.

First of all, there are historical conditions that gave rise to Milan's fashion. The city's development in that area occurred throughout a number of eras, having its ups and downs. Among the most consequential activities were of the *mecante* of great Milanese families

supported arts and culture and the evolution of new trends in fashion, Industrial Revolution and Post-War American funding that allowed the fashion industry to capitalize on new machinery and know-how along with direct financial support.

Furthermore, Milan has an advantage due to economical factors, especially by attracting the 'finest talent' (Fabris 2002) or what Florida (2002) calls 'the creative class' as the city offers the widest opportunities for professional development in the region. Milan has an advantageous infrastructure involving specialized PR agencies and publishing media form all over the world. The reputation of the quality of *Made in Italy* products of which Milan is the production center is a major contributor to the city's privileged position.

The following geographical factors are not of a less importance, organizational capacity of fashion clusters, the networks between fashion companies and the consequent information flow contribute to a better evolution of the fashion business. The location factors are related to external importance of industrial districts located outside the city and internal clusters of stores, flagships and showrooms, situated in the various parts of the urban area.

Last but not least, the specialization in ready-to-wear industry is an asset. In comparison to Paris, the home of high and luxury fashion, *haute couture* is of a minor importance in Milan, the clothes have to have high fashion content but also be wearable. Nevertheless, ready-to-wear is still a high fashion segment oriented towards wealthy consumers offering them a unique stylistic identity. Indeed, Milanese fashion has to deal with its domestic market where consumers have high expectations and are very picky and sophisticated in the way they dress.

To sum up, the underlying reasons of competitive advantage are various, constituting a mix of multiple factors. As Reinach (2006) claims, there was no single reason of success of Italian ready-to-wear and the development of Milan as a fashion city. Many factors – economic, social, cultural and geographical along with the spirit of the times contributed to its glory.

2. City branding- "a powerful image building strategy"[3]

2.1. Introduction to city branding

In the previous chapter the profile Milan's fashion industry was presented, with a special emphasis on its main points of strength. This chapter focuses on introducing the concept of branding of the cities, with indication of how the fashion industry can be utilized to create a positive city image.

Worldwide competition between cities resulting from increasing economic and cultural globalization has been a stimulus for the development of place branding techniques. Cities all over the world need to express their unique characteristics, state their economic, cultural and political goals in order to differentiate themselves from other regions and better compete for resources, tourists and residents (Kavaratzis&Ashworth, 2006). Moreover, branding of cities contribute to urban development and serve as a tool to improve the city positioning. Thus, city branding is a central activity within city management and one of the most debatable topics among place marketers. Its main objective is to launch new campaigns that would attract local population, tourists, and investors, in order to bring money to the city, improve its image worldwide and emphasize its distinctive identity. The city can develop multiple brands for different audiences, Milan could be branded as a city of fashion when targeting tourists or the city of finance when attracting investment. City brand can serves as an umbrella covering all characteristics of city's life and activities. Generally, speaking, branding can be understood as 'generating expectations in actual and potential city users' minds and ensuring that these expectations are met in the way people experience the city' (Ashworth & Kavaratzis, 2007:528).

2.2. What is a brand?

A brand is an impression of a product or service perceived in a clients' mind. It consists of all tangible, intangible psychological and sociological features, which make the selection

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[3] An expression used by Kavaratzis&Ashworth (2006)

exceptional, and all the attributes that come to the consumer's mind when they think about the brand. 'A brand is a personality the customer relates to concerning the product. 'The brand is a promise of something' (Moilanen&Rainisto, 2009:6).

Similarly, Kavaratzis&Ashworth (2006:208) give a definition of a brand as 'a product or service made distinctive by its positioning relative to the competition and by its personality, which comprises a unique combination of functional attributes and symbolic values'. According to the authors a brand is a complex construct through which managers attribute the value to the products or services. Additionally, branding makes it easier for consumers to recognize and appreciate these values. Branding is a mean of communication, where the central concept – brand image endows perceptions of quality and values along with brand associations and feelings (Kavaratzis&Ashworth, 2006).

Summing up, branding is about making a difference by emphasizing unique attributes of a product. The intrinsic symbolic value is associated with social distinction or the emotional value the brand is communicating. To give an example, Armani clothes are made from high quality materials and are characterized by sophisticated look. However, they are just nice textiles if there wouldn't be any story about Armani brand which comprises emotions behind the product (Corbellini&Saviolo, 2009).

2.2.1. Brand identity versus Brand image

The branding strategy can be summarized in the graph below:

```
          ┌─────────────────┐
          │     BRAND       │
          │    IDENTITY     │
          │                 │
          │  How the owners │
          │  want the brand │
          │   to be         │
          │   perceived     │
          └────────┬────────┘
                   │
                   ▼
┌──────────────────────────────────────────┐
│          BRAND POSITIONING               │
│                                          │
│ The part of the value proposition        │
│ communicated to a target group that      │
│ demonstrates competitive advantage       │
└────────────────────┬─────────────────────┘
                     │
                     ▼
            ┌─────────────────┐
            │     BRAND       │
            │     IMAGE       │
            │                 │
            │   How the       │
            │   brand is      │
            │   perceived     │
            └─────────────────┘
```
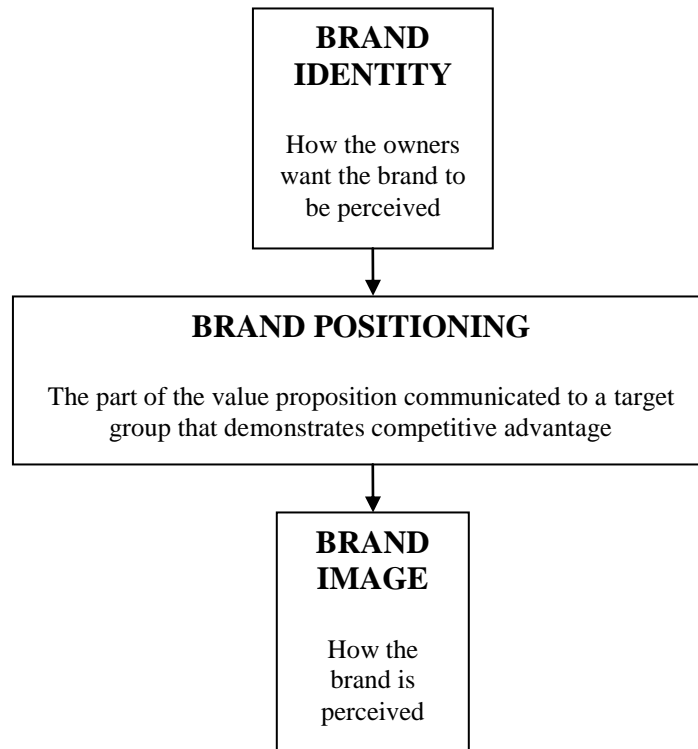
1: Brand components by Kavaratzis & Ashworth (2006)

The crucial issue is the differentiation between brand identity and brand image. Brand identity involves a creation of a bond between the brand and the consumers, with 'a value proposition that consists of functional, emotional and self-expressed benefits' (Kavaratzis&Ashworth, 2005:509). The development of brand identity is an active process dependent on the company's strategy and vision, it represents how the company or a city wants to be perceived.

To compare with, brand image is the perception of a brand in the people's minds, it is what people think about the brand, 'their beliefs, expectations, emotions' (Kavaratzis&Ashworth, 2005:509). It is a passive process that takes places after the creation of an identity being peculiar evaluation of what was realized.

Brand Identity	Brand Image
company strategy	customer experience
projected assets	perceived qualities
Reality	Appearance
Active	Passive
Looking ahead	Backward looking
Indicates 'where you aspire to be'	Indicates 'what you received'

2: The characteristics of brand identity and brand image (Management Study Guide, 2010, proBRAND, 2010)

It is important to say that the projected brand is not always consistent with brand image, the brand managers have no guarantee that the brand will be perceived in an expected way. The full coherence between identity and image is a very important issue, however difficult to achieve. Nonetheless, by developing a proper branding strategy, the company or location can minimize all the discrepancies between the two. Nowadays, it can be noticed that some city brands are more successful than others. One of the greatest examples of the very positive results in branding the city is New York. After a success of 'I love NY' branding campaign, the city launched 'New York work' which appeared to reflect the city's dynamism and 'can do' attitude, by portraying the city as a perfect place to work and prosper (Salman, 2008). As a result of the creation of a clear identity the city is regarded as it aspired to be perceived.

To compare with, a brand developed for a Canadian city 'Toronto Unlimited', promoting a city as a place of unlimited opportunities and great potential of the people, failed due to lack of clear vision. Toronto wanted to promote itself as a City of Business, City of Tourism and the City of Meeting, all in one brand, which resulted in vague, unclear identity (www.torontounlimited.com, Molyneux, 2011).

In conclusion, without a clear, distinctive identity and vision, even the best advertising campaigns won't be able to achieve desirable image and the brand will have seemingly failed.

2.3. The evolution of the place branding concept

There is a small gap in the literature in relation to the branding endeavors of various locations, many authors have avoided this topic claiming that places are too complex to incorporate this issue in branding debates due to their 'underdeveloped identities that are not commonly regarded as brands' (Moilanen&Rainisto, 2009). On the other hand, the press has been recently more and more interested in the concept of branding as applied to locations, it can be noticed that many scientific magazines and daily newspapers cover the issue of city branding and its dimensions.

The first concepts of modern branding appeared in the 19th century including legal instruments, logos, images, personalities, relationships. According to Room (1992), using brands as marketing strategy is one of most basic of product differentiation forms. However, the endeavors to apply branding terminology to other areas than tangible products have begun not until 1990s. Specifically, the distinctive place marketing approach has its roots in the US with relation to the immigration flow from East Cost and Europe to West Cost 'by the promise of the land'. Furthermore, the British and French resorts were advertising themselves to attract tourists from all over the world (Moilanen&Rainisto, 2009).

Kavaratzis (2010) indicates that the application of marketing techniques to places derives from two distinctive approaches. The theoretical perspective is related to the new marketing trends in non profit organizations. In turn, the practical perspective was initiated by city officials, who given the decline of urban economies resulting from the "urban crisis", had to undertake some actions and find new solutions for urban problems in order to restructure the economy. Indeed, nowadays city branding is a mean of revitalization of urban centers, supporting city's creative profile and thus contributing to its cultural as well as economic value.

2.4. Branding the place versus branding psychical products and corporations.

Place branding is a very broad concept as it can involve branding countries, cities or tourist destinations. The emergence of these distinctive trends is the result of the complexity of

the issue and its various aspects. The most comprehensive definition is given by the author of the concept of place branding - Simon Anholt:

Place branding is the management of place image through strategic innovation and coordinated economic, commercial, social, cultural, and government policy. Competitive identity (CI) is the term to describe the synthesis of brand management with public diplomacy and with trade, investments, tourism and export promotion (Simon Anholt, Competitive Identity, 2007:3).

Although simple product branding can be very useful when applied to an analysis of place branding, places are to complex and multidimensional to be treated like products. Thus, the meaning and dimensions of branding are shifted when applied to places. Undoubtedly there are some common features between product and place branding, like novelty which endows providing product or experience different from competitors. People often understand countries or cities similarly they perceive brands, 'it is in people's minds that the city "takes form through the processing of perceptions and image about the city' (Tasci&Gartner, 2006: 209).

Even though, we can use similar branding techniques for products and for places, there are some important distinctive features of product and regions branding. One important difference is the target market, place marketing involves more stakeholders and they are more diverse than in the case of products. Jaffe and Nebenzahl (2006) try to explain the difference between product and place branding arguing that product brands are oriented towards one audience - the consumers, In comparison, branding geographical region is more complex, as it involves often national or even international aspects (Jaffe&Nebenzahl, 2006). Places are multidimensional and consist of many stakeholders in the same field who are also competitive within the place. As indicated by Gartner (2009: 54) 'Destinations are the agglomerations of businessmen often competing for the same customers. They may be very effective at hilling the benefits of their own brand but not as good at selling destination brand'.

Another important difference is brand stability which is established when customers are fully aware of their purchase. In contrast, places are dynamic, change depending on the season and there are often fluctuations of the residing population. Moreover, experimental feature of places and their intangibility is what makes them more complex to evaluate. Products are functional goods, can be seen and felt, whereas the value of the places is not easy to be accessed as it cannot be tasted or touched. Moilanen&Rainisto (2009) indicate that when we are branding

the services the focal issue changes in comparison to branding the products as it is created during the service contacts. The projected image is based on objective, received information and peoples attitudes, expectations and experiences.

2.5. From city marketing to city branding

City branding developed as a part of city marketing which is an integral part of place management and urban planning. The goal of city marketing is to attract and mobilize the factors of external growth such as purchasing power, investments and public support funds, production potential and innovation (Krantz & Schatzl, 1997). City marketing aims to improve the city's image in the world outside and identify inhabitants with their city. Moreover, city marketing contributes to improvement of interurban competitive position of a city or region, it addresses so called "new urbanity" which involves gentrification, cultural innovation and psychical upgrading of the urban environment. Nowadays, cities must be flexible and adopt their socioeconomic and administrative structures to the dynamic events in the market. City marketing refers to the operations that direct their activities towards the current and potential needs of customers in order to achieve business goals: income increases, security of employment and services stipulation and environmental issues. It helps to give the city a 'profile', unique advantages in the provision of services and unique selling proposition –USP (Krantz & Schatzl, 1997). Advertising the city can serve as an instrument to develop a comprehensive branding strategy, which aims to pursue a policy that would favor economic development. Generally speaking, city branding is a broader concept then city marketing as it focuses on a holistic vision and cohesion between brand identity and image, whereas city marketing is mainly related to fulfilling customers' needs and expectations.

2.6. Branding the city through fashion

2.6.1. The growing impact of creative industries in city branding

Culture

In recent years we can observe an increasing role of cultural industries within modern markets involving local and incoming population. The new symbolic economy is expressed through media, fashion, design, photography and other industries that have been rapidly developing. According to Kavaratzis (2010) culture plays a significant role in the local economic development which is proved by growing competition between cities to become the Cultural Capital of Europe. Culture is a means to transformation of deteriorating areas into developed districts of culture. Therefore, creative, image-based industries have a significant role to perform in city branding.

Fashion

Similarly to other creative industries fashion can greatly contribute to the urban regional development. It has been recognized by city boosters who try to capitalize on branding of their cities through fashion events and projects related to fashion and design. In involves not only the cities that have long tradition in fashion like Paris, Milan or London but also developing cities. A good example of the recognition of fashion as an important factor in marketing the city is 'The Style City' concept implemented by Abu Dhabi Investment House (ADIH) in Abu Dhabi, Qatar, Morocco, Tunisia and India. The aim of the project is to attract international brands in fashion, design, jewelry and furniture in order to establish style and design hubs in emerging markets (Porta Moda, 2010).

Moreover, the relevance of branding of the city through fashion is reflected in the literature. Javier Gimeno Martinez (2007) presents the branding process that Antwerp underwent during 1990s. According to the author, even though fashion is Antwerp's most characteristic creative industry, the city does not resemble other fashion cities which are mainly based on major trade activities related to fashion. Unlike other fashion capitals, Antwerp never hosted any

fashion week. However, Antwerp's position as a fashion city is related to an organized tourism, big cultural events and the relevance of public and private networks. Fashion is often involved in programming of local institutions, the most important of which was culture lead regeneration project, celebrating Antwerp as a European City of Culture. The project consisted of the cultural event *Mode2001- Landed- Geland* and the opening of the *Mode Natie-* a multicultural building that hosted the fashion academy, the Fashion Museum and the Flanders Fashion Institute.

To compare with, Norma Rantis (2004) examines the fashion industry in New York City. The author researches the ways in which fashion designers derive from the city's surroundings and infrastructure in their creation and marketing of their products. Multidimensional interplay between fashion products and the place were they are created, presented and sold is emphasized. By analyzing the spatial dimension of cultural production the author reveals the reciprocal relationship between the fashion and the city.

Similarly, Breward & Gilbert (2006) present the development of fashion cities around the world and their importance in the production and consumption of fashion within the local and global context. The authors emphasize that fashion is a significant contributor to the promotion of the city's creative economy. The cities like New York, Paris, London and Milan are mentioned by the authors as the top fashion cities, however the authors indicate that world fashion order is undergoing a transformation giving the importance to such cities as Shanghai, Dakar or Mumbai. According to the scholars, these cities have a potential to become new world fashion capitals.

To sum up, cultural industries are widely involved in planning of the cities, their persuasive power, image, symbolic and immaterial values are commonly recognized. As indicated above various world cities emphasize their creative offering in order to better promote themselves. This importance is reinforced by mutual dependence of creative activities and places where they are implemented. Fashion is a significant source of social and economic capital what makes it an important asset when attracting people to the city and improving its image.

2.6.2. Branding channels- developing brand identity

Given the theories about the impact of the fashion industry on the city, it is necessary to analyze in what ways a city can be branded through fashion. In order to do so, various possible branding channels should be examined.

Branding channel is defined by Jansson & Power (2010) as a set of related or similar spaces and activities through which many brand and massages can be communicated and negotiated. Branding channels are characterized by interactionism, which means that they are formed by various actors, stakeholders and audiences who interact with each other (Jansson&Power, 2010). This type of channels might have a commercial dimension when shaped by fashion houses or they can assume a broader form when stimulated by the city authorities. Jansson & Power (2010) present four main city's fashion branding channels: Promotional Events, Spokespersons and Patrons, Flagships and Showrooms and Retail Districts.

Promotional events linked to fashion

Promotional events such as fashion weeks, catwalk shows, trade fairs and showcases are the central factors through which fashion institutions try to get in touch with the consumers. These events are especially important with regards to setting trends, additionally they give an opportunity to take orders and negotiate contracts. The main purpose of the fashion related events is to sell the products and to communicate their peculiar qualities, novelty, innovation and exclusivity. City boosters as well as fashion firms and institutions are eager to invest in organizational capacity, locations and facilities expecting high returns from such investments (Jansson&Power, 2010).

Spokespersons

The spokespersons involve people and organizations whose views are respected and have an influence in shaping public opinion. Those are mainly designers, who refer to the positive impact of the city on their creativity. Some of them can promote the city even more directly for example by incorporating the name of the city into their brand (e.g. Donna Karan New York)

which might a very persuasive communication tool. Nevertheless, not only designers can enhance the city's desirable identity but also other agents like TV producers, magazine editors, and various fashion foundations. The opinion makers create narratives about the city and very often have an input in funding of the projects by various sponsorships and patronage. It is especially the case of cultural patrons, of existence of which Milan has a long tradition (e.g. before mentioned Sforza and Visconti families).

Flagships and showrooms

Showrooms are the places where customers and opinion makers can directly experience the recent collections. Fashion designers put a lot of effort and money into arranging the places where they can display their products. Showrooms not only reflect the supply of the products but also stimulate demand among targeted audience. Similarly, flagship stores can be glamorous showcases for the designer collections offering the holistic unique experience. As noticed by Tungate (2008:250) shopping is a form of entertainment, and as a result, 'brands are creating spaces that have much in common with museums or theme parks then traditional stores'. Armani flagship store involves not only clothing but also cosmetics, furniture, food and electronics. Moreover, an interesting concept of the flagship store is the one offered by Abercrombie and Fitch. The place resembles a nightclub with loud disco music, palms, sofas and young attractive personnel.

A unique flagship store is not the only mean of attracting attention of customers. The successful branding strategies involve direct advertising through billboards and posters. A good example of the power of this branding channel is the Emporio Armani billboard in via Broletto, Milan, presenting Cristiano Ronaldo. The huge billboard caught a significant media and public attention (Vogue, 2010).

Retail districts

The shopping districts are the following powerful factors that contribute to a creation of the city's brand identity. First of all, clustering is one of the most important sources of the competitive advantage of retail chains. As indicated by (Hines&Bruce, 2007:108) 'The three keys

to success in retail marketing were famously said to be 'location, location, location' that is having your store near to where large numbers of your chosen customers live or shop'. Indeed, many fashion companies believe that being located in a proper location is one of the best marketing techniques.

Nevertheless, fashion clusters are not only beneficial for the stores themselves, giving them the opportunity to take advantage of attracting the same type of customers, but also for the city's perception as a fashion capital- retail districts are the benchmarks for the city. According to Jansson&Power (2006) densely concentrated retail districts give a noticeable credibility to the underlying concept of the fashion industry and attracting consumers' attention. It means that there is a specific message coming out from the shopping landscape of fashion cities like Milan, Paris, London, New York. The shopping districts in these cities can be characterized by all three types of market segmentation, end uses, clients and price**.**

2.6.3. The segmentation of the fashion market

Fashion is one of the creative industries that have to deal with immaterial value added to the functional assets of fashionable goods, which involve not only numerous products but also target a range of customer groups. As presented in the previous chapters until 1970s fashion was mainly associated with ready-to-wear. However, since 1980s fashion expanded to other segments like cosmetics, fragrances, eyewear, and jewelry. Generally speaking, as indicated by Corbellini & Saviolo, (2009), the clothing industry can be segmented by 3 macro-economic criteria, **product end uses, clients and price.**

Product end uses

There are various products end uses which involve products function, destination, manufacturing process and occasion of use. The end uses categories here involve external clothing, beachwear, underwear and sportswear.

Clients

The industry can be segmented according to clients group that are trade channels (wholesale and retail) and end customers. Retail channel is a direct exchange of goods between the industry and the customer without any commercial mediators, e.g. direct sale in monobrand stores, boutiques and outlets. To compare with, wholesale involves commercial intermediation, the multibrand boutiques and department stores. End customers can be categorized according to such variables as age, gender, area of residence, social class, income and lifestyle.

Price

The fashion market is most commonly segmented by the average market price for the particular goods. There are 5 fashion segments: *couture*, ready-to-wear, diffusion, bridge and mass market:

Couture

This fashion segment was born in Paris in the mid of the 19th century as a 'made to measure' fashion. A *couture* garment is considered as a 'piece of art', emphasizing the craftsmanship, classicism and timelessness. Currently, it is a protected name used by the companies that fulfill certain criteria. Due to the low profitability from sales (the products are extremely expensive) couture has been repositioned to the lower price range- 'demi cuture' which constitutes 1/10 of the price of couture and combines industrial ready-to-wear with 'traditional *houte couture*.

Ready-to-wear

The fashion segment priced three to five times higher than the market average. Ready-to-wear is a result of a partnership between designers and manufacturing companies. The collections are expensive and strongly dependent on the designers taste, creativity and reputation. There is a strong emphasis on communication campaign, marketing and PR. The most important communication channel is the fashion show and other fashion events.

Diffusion

This market segment is priced two or three times higher then the average market price and involves designer brands extensions (the second and third lines of designers). Diffusion is a more affordable market segment balancing between high fashion content and economies of scale. Wholesale is prevailing in this market segment.

Bridge

Estimated price ranges from one to one and a half to two times higher than the average market price. It constitutes a 'bridge' between diffusion and mass market segment. This fashion segment involves mainly premium industrial brands. Moreover, image and velocity of delivering the product to the market prevail over creativity. Nowadays, many bride fashion companies attempt to reposition themselves to higher diffusion.

Mass market

The fashion segment priced below average market price. It relies on basic, less sophisticated products. What is important, are the quantities and the fast deliveries of the products to the market. Mass market fashion is based on competitive patterns similar to other consumer goods and low barriers to entry.

2.7. Successful place branding- problems and challenges

Developing a successful and original brand that would be positively associated by the consumers is one of the biggest challenges the cities have to face in the 21st century. Building place brand can pose some doubts and create difficulties. According to Moilanen&Rainisto (2009), the main problems involve: collective character of place marketing, limited options to find strategic partners, limited resources, low level of control, not determined end product and projected experience, defining brand objectives, experience characteristics of tourism, and global competition between cities.

Furthermore, Rainisto (2007) distinguishes 9 success factors in place marketing and branding: Planning Group, Vision and Strategic Analysis, Place Identity & Place Image and Leadership - which are the core factors in place marketing practices. Additionally, there are

peripheral factors that shape the macro environment where place marketing in implemented, those are : Public- Private Partnerships, Political Unity, Global Marketplace, Local Development and Global Marketplace, Process Coincidences.

According to Tasci&Gartner (2006), there are several challenges when achieving successful destination branding. First of all, there should be collaboration among all of the actors involved in order to achieve analogy between psychical and social values of the destination. Secondly, the target market should be clearly defined and the vision of the destination development should be supported. The other challenges involve creating an appealing and unique image, defining its attributes, building an umbrella concept that involves the separated branding activities within the region, catchy slogan, visual image, symbols and organizing special events that would increase the level of brand awareness. Furthermore, the creation of good place brand requires proper communications which give promises, are reliable, desirable and unique.

Branding in a destination context involves development and maintenance of a positive image and identity. It indicates that brand development is a long term process which requires determination and ability to predict the upcoming challenges. All of the above mentioned authors agree that there are some principle rules that have to be followed in order to develop a successful place brand. The commonly mentioned challenge is developing and communicating branding objectives and values. Indeed, once brand identity is defined it has to be shaped into brand image. Although, the authors indicated the global context of place branding, none of them emphasized the fundamentality of this factor. On the one hand, globalization brought abundance, prosperity, disappearing borders, uniform taste and the emergence of one global culture. On the other hand, when everything is at arm's length, people seek new sophisticated types of entertainment, a unique experience. As the competition between cities has been reinforced by globalization, it is crucial to develop a city's unique selling proposition, rather then implementing repetitive branding patterns.

Differentiation from the competitors is especially relevant when branding the city through fashion due to ever-shifting fashion trends and subsequent changing consumer expectations within global scenario. Additionally, transnational fashion systems, new fashion cultures as well as emerging competitive fashion cities which are oriented towards innovation, broaden the extend of the fashion networks and raised the requirements for successful branding of the city through fashion.

3. Methodology

3.1. Evaluating city branding

Successful brand involves developing a connection and consistence between brand identity which is a 'brand promise' based on the communicated attributes and brand image which is the perception about the brand. The brand constructing process is based on several stages through which various instruments are created in order to present brands strengths and a unique value proposition that will differentiate the brand on the global scene.

The branding research can be approached through empirical studies involving both the supply, the generation of brand identity and demand side - the perception about the brand. Supply side is often researched through focus groups, in depth interviews with local authorities, stake holders and the content analysis of promotional materials. Data analysis differs when it comes to demand side perspective which can be analyze through quantitative surveys, focus groups, direct or indirect in-depth interviews with residents, potential and current tourists, content analysis of information and independent sources (Tasci&Gartner, 2006). The analysis can be joined in order to obtain a comparison between projected brand, including the meaning of the place defined by the destination authorities and the perceived brand, which refers to meaning and assets defined by targeted audience.

3.2. The research objectives

This research aims to study the relationship between brand identity explored further in chapter 4 and brand image analyzed in chapter 5. Brand identity is researched through an analysis of the city's cultural and spatial dimension expressed by promotional events linked to fashion, fashion clusters and relative position of Milan to other fashion cities. Furthermore, the brand image is researched through re-analysis of the study conducted at Bocconi University commissioned by the Milan City Administration[4]. For the purpose of the research in this thesis,

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[4] The objectives of the research titled "The perception of brand Milano as a Fashion and Design Capital' were to answer the following questions: What are the international students' objectives to come to Milan? What is the

several questions included in the above mentioned study will be re-analyzed. The main purpose of the thesis is to evaluate the image of Milan as a fashion capital. Therefore, the results of particular branding channels are analyzed. Those are: promotional events linked to fashion, including Milan Fashion Week, fashion fairs, artistic and cultural events linked to fashion and, the presence of internationally renowned brands and shopping clusters. Furthermore, the shopping experience will be evaluated and retail clusters will be described. Additionally, it will be researched how Milan is positioned among other fashion capitals, whether reputation as a fashion capital is one of the main reasons to come to study in Milan and to what degree the word 'fashion' or the phrase 'fashion capital' are associated with the city. Finally, to gain an insight how the perception of Milan differs per nationality/city of study, the results coming from the students attending different fashion schools (in which dominating nationalities can be observed) will be compared.

3.3. The research method

The research method used in the thesis is based on qualitative and quantitative research approach. That is to say that the main concept of city branding in the context of identity and resultant image is operationalized in the manner allowing it to become a measurable phenomenon. The qualitative analysis of promotional materials and retails districts is conducted in order to examine the creation of brand identity. This analysis is based mainly on examination of the Milan City Administration and National Chamber of Italian Fashion promotional articles published online, organizational websites, store/street websites, city and tourist guides and own observation. Importantly, the research focuses on brand image, therefore there is more attention devoted to studying such. Brand image is analyzed through quantitative analysis of the data collected via survey conducted among international fashion students in Milan. The chosen data collection method for analysis on brand image emphasizes quantification in the collection and analysis of data. That entails a deductive approach to the relationship between theory and research, in which the accent is placed on testing of theories. This kind of research strategy,

perception of the city of Milan? What are the different perceptions of the city as a fashion or design capital? What is the evaluation of the shopping experience? What are the world fashion capitals mentioned by international fashion students in Milan? What are the reasons to come to study to Milan? What are the mental associations with the city?

involves the 'practices and norms of the natural scientific model and positivism, regarding social reality as an external, objective reality' (Bryman, 2008: 22).

In fact, the first part of the empirical research, particularly the sections 5.1- 5.3 are analyzed using quantitative analysis of close ended questions using SPSS software. However, in order to gain a deeper insight into the results and to verify the findings gathered in section 5.1- 5.3, the following section, related mainly to open ended questions is analyzed using the software Tag Crowd which allows for creating word clouds, a data analysis method explained further below. In brief, in order to visualize the data gathered in the quantitative analysis of the survey will be complemented by visual depiction of responses given to the open ended questions.

The research focuses on descriptive and explorative study. Descriptive research the information gathered is related to an existing phenomenon and the nature of the situation, describing 'what is happening'. This method is especially useful when analyzing brand identity, which focalize on describing what the brand is, stating the actual qualities of the brand. In turn, exploratory research is valuable when researcher wants to study a new area and/or to test methods, such as surveys and survey questions, for investigating that area. Thus, this kind of study can be used in order to explore the brand image. According to Balvanes and Caputi (2001) above mentioned research is useful to gather first hand data from the respondents that would allow for the formulations of conclusions and recommendations for the study.

3.4. Researching brand image

3.4.1.Sampling

In order to analyze brand image, a representative cross section of the total of 3,254 international students attending fashion/design courses at various universities/academies in Milan, was surveyed with a printed out questionnaires. It should be indicated that as the unit of analysis of the research are only international students in Milan studying fashion related courses involving regular and exchange students, thus covering 30% of all the students (majority Italian) studying fashion/design related courses in Milan. In terms of time dimension, the research

focuses on cross- sectional study which involves observations of a sample of a population that are made at one point in time.

The data collected was derived form 6 schools/universities which have courses related to fashion or design. Among the schools were Bocconi University, SDA Bocconi- program MAFED, Universita Cattolica, Domus Academy, Milan Fashion Insitute and Politecnico di Milano. In total, 304 questionnaires (42% of the total 723) were filled by the fashion students from the above mentioned schools. The sample was selected according to convenience sampling which is non probability sampling technique. This kind of sampling involves drawing the sample which is 'close to hand', as the selected people are available and convenient. It is a common sampling method due to the sample convenient accessibility and proximity to the researcher (Experiment Resources, 2010).

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The distribution of the students who filled in the questionnaires among different fashion schools relevant for further findings in terms of differences in opinion based on geographical background is presented below:

University/Institute	Course	Nr of completed questionnaires
Bocconi	**Competitive Strategy** **Management of Design** **Management of Fashion and Design Companies** **Management of Fashion and Luxury Companies**	**182**
SDA Bocconi	**Management in Fashion, Experience & Design Management**	**27**
Sacro Cuore Catholic Univeristy	**Management in Communication in Cultural Industries** **Master Luxury-Goods Management** **Other Courses**	**10**

	Master in Fashion&Accessories Design	32
Domus Academy	**Master in Fashion Management**	20
	Master in Design	4
Milan Fashion Institute	**Master in Fashion &Design Retail**	2
	The Fashion Institute of Technology (FIT)	21
Polytechnic University	**Other Courses**	6
Total		**304**

3: The number of students by university/course

Among the interviewed students 75% were women and 25% men. The students who filled in the questionnaires were in the age range between 19-37 years; however 75% of the interviewed students were less than 25 year old.

The geographic region	Percentage of respondents
Europe	**37**
Asia	**20**
North America	**31**
South and Central America	**8**
Australia New Zeeland	**3**
Africa	**1**
Total	100

4: The region of respondents' origin

Interestingly, particular schools or even fashion courses attract (or is especially created) students from different geographical regions. Thus, for example, FIT program offered by Polytechnic of Milan is attended entirely by the students from New York. To compare with, Domus Academy attracts many students from Asia, especially from China. Program MAFED is attended mostly by students from Europe, however a significant part comes from China.

The geographic region	The school/program				
	Bocconi	MAFED	Domus (Fashion Management)	Domus (Fashion&Accessories Design)	FIT
Europe	31	52	15	9	0
Asia	11	29	68	83	13
North America	44	11	12	0	87
South and Central America	9	8	5	2	0
Australia/New Zeeland	3	0	0	6	0
Africa	0	0	0	0	0

5: The attendance of a fashion school by the country of origin (%)

3.4.2. The structure of the questionnaires

In order to evaluate the effectiveness of branding channels, overall branding policy and to give policy recommendations structured questionnaires/surveys were chosen as the most suitable data collection method. According to Creswell (2009:12):

Survey research provides a quantitative or numeric description of trends, attitudes, or opinions of a population by studying a sample of that population. It includes cross- sectional and

longitudinal studies using questionnaires or structured interviews for data collection with the intent of generalizing from a sample to a population.

The survey assumed the form of self administered questionnaires (also known as self completion questionnaires) where respondents answer the question by completing the questionnaires themselves. The form of administration involved handing out the questionnaires to all students in the class and collecting them back after they have been completed. In general, the questionnaires were completed by the whole class under the supervision of the researcher. Overlooking to questionnaires of others was discouraged. Prior to the completion of the questionnaires, the students were asked to fill in their name, age, gender, nationality, city of residence, city of their study, name of the university and their degree. It took on average 10-15 min to fill in the questionnaire.

The selected questions were divided into four parts:

The importance of particular branding channels in perception of Milan as a Fashion Capital.
The factors included the presence of Fashion Weeks, artistic and cultural events linked to fashion open to the wider public, the existence of internationally renowned fashion fairs, fashion brands and specialized shopping areas. Furthermore, given the branding channels indicated above, the students were asked to indicate in which areas Milan can improve in order to be considered a fashion capital. The answers were formed in Likert Scale, students had to indicate to what degree they agree with the particular factors.

The evaluation of shopping experience and retail areas.
The students were asked to what degree they can agree with the statements that in Milan they can find all the big internationally renowned fashion brands or stores and products with original and local concepts. This part also involved the questions about service offered in terms of store opening hours and sales assistance. Afterwards the students were asked to evaluate overall shopping experience in Milan ranging from very negative to very positive.

In the second part, the students were asked to evaluate the particular shopping areas according to their characteristics by indicating the points of strength of particular shopping areas.

Among the factors they could choose between: the exclusive image, the convenience, the young offer, the opportunity to find the most popular brands, the opportunity to find niche brands that nobody knows. The students also had the option for their own characterization or the option to indicate that they were not familiar with the area.

The position of Milan among other fashion cities

The students were asked to name two cities that they consider the main international capitals of fashion and briefly explain why they chose a particular city. The aim of this question was to find out whether Milan will be mentioned by students and which position it gains among other fashion capitals. The explanation given by students could help structure the overall characterization of the fashion capitals.

The relevance of fashion as a main concept associated with Milan

The students were asked to give three reasons for deciding to study in Milan. The goal of this question was to check how often being a fashion capital would be indicated as a primary reason. Moreover, in following section, the students were supposed to define the city with three adjectives. The goal was to check how many times the words associated with fashion will be indicated.

3.4.3 Data analysis

In total the answers for 14 questions were analyzed. The sections 5.1-5.3 (Likert scale questions) were analyzed using SPSS. The mean of the results was counted in relation to each factor in order to check which branding channels have the most influence in creating a perception of Milan as a fashion capital. The same statistical measure was applied with regards to the areas in which Milan can improve in order to be regarded as a fashion capital. The weighted mean and the standard deviation were calculated in relation to the overall shopping experience. Finally, the particular shopping districts were quantitatively evaluated by presenting graphically their main points of strength, accordingly to the factors chosen by students.

The open ended questions were analyzed using Word Cloud a type of data visualization that sums up the content of the responses by depicting the words that appear the most often. A basic definition of a word cloud is given by (Ramsden&Bate, 2008): 'A word cloud is a visual depiction of words. The more frequent the word appears within the text being analyzed the larger the word becomes'. In other words, the word cloud reflects word frequency by the size of the words. Tag Crowd was chosen over other similar software systems like Wordle, MakeCloud as it is a clear and simple data visualization method, often used as a benchmark program allowing simple data depiction (Cidell, 2010).

The main purpose of using this technique was to obtain the key words of each of the areas. The students were asked to chose a word to describe the particular shopping clusters in Milan. Collecting and presenting 3-6 words that were mentioned the most often allowed for identifying the key characteristics of the areas and verifying answers for the previous close ended question where students were supposed to evaluate particular shopping areas according to 7 shortlisted characteristics.

This research method has its advantages and disadvantages. Visual depiction of the responses in a short time illustrates the effectiveness of this type of analysis. According to McNaught&Lam (2010:3), a word cloud 'demonstrates a fast and visually attractive way to enable researchers to have some basic understanding of the data at hand'. The word clouds can be a useful for validation of previous findings, providing an additional support for other analytic tools. The students were asked to choose just one word, so that the results can avoid the limitation of the method as the words were not taken out of the broader context. The phrases that consisted of two words e.g. mass market were combined into one word using – (mass-market). As the program doesn't allow for grouping similar words (e.g. hip hippie hipster), the words having basically the same meaning were translated into the same word (e.g. hip, hipster and hippie were combined into hip). Non frequent words are hidden (the word has to appear at least twice to be displayed) so that the resultant representation clearly shows the most frequently occurring words.

3.5. The limitations of the research

The purpose of the research is to analyze the brand image of Milan as a fashion capital, basing on the development of relevant brand identity. There are limitations with regards to

analyzing both – brand identity and image. First of all, in relation to analysis of brand identity, it is worth mentioning that although this thesis focuses mainly on the effectiveness of the state branding policy, the city is branded not only by the city administration and public institutions but also by other agents like celebrities, spokespersons, designers, showrooms (ref. pp. 31-33). The important role in publicizing the city are among other things, international media exposure, testimonials, and myths about the city, the branding channels not involve in the research.

In relation to brand image, the research is based on convenience sampling which according to some scholars (Babbie, 2008) does not allow for making generalizations about the total population from this sample because it is not representative enough. Nevertheless, the sample is large enough (724 out of the total of 3,254) and there are rather no groups that would be underrepresented or omitted among the target group. The more important limitation might be related to the chosen population itself. The answers can be biased as the sample consists of the students who study fashion and have competence in fashion related concepts. There is a possibility that the dispersion of the results would be higher if the interviewed students attended courses not related to fashion or design. Moreover, the perception of Milan as a fashion capital is researched solely among international students that came to Milan to study fashion related subjects. This does not allow for making generalizations about the image of Milan as a fashion capital in general. The research does not consider the opinion of other potential groups of respondents like inhabitants of the city, tourists or people that never visited Milan but have established opinion in relation to its perception as a fashion capital. In order to obtain such we would have to interview variety of actors which would be time consuming and expensive. Finally, although the image is researched in relation to the students' opinion, the creation of urban identity is analyzed considering the variety of branding channels not solely devoted to students but to more general audience.

4. Brand Identity- an analysis of branding channels in the Milanese fashion system

As indicated in the previous chapter, urban branding aims to persuade targeted audiences to see the city in particular ways. Generally speaking, Milan's brand is shaped by multiplicity of actors, driven by various motivations. On the one hand, there are private sector spokespersons, designers, celebrities visiting Milan or settling down in Milan (David and Victoria Beckham) motivated mainly by self marketing. On the other hand, there are public agents who want to promote the city in order to boost the city's economy.

As indicated before, the thesis focuses on the endeavors of public branding policy. Public officials are important patrons of branding Milan by investing significant amounts in Milan's status. State agents have a crucial role in supporting of fashion industry, through organizing various promotional events, enabling urban regenerations projects, developing fashion districts, sustaining various retail networks and associations.

In this chapter two main branding channels will be discussed: promotional events linked to fashion, including Milan Fashion Week, cultural and artistic events linked to fashion and fashion fairs. Furthermore, the other branding channel will be related to various retail districts, mapping shopping areas in Milan and presenting their characteristics.

4.1. Promotional events initiated by the Milan City Administration and fashion institutions

The scheme of fashion events is highly dependent on global fashion circles which repeat themselves annually. The most of the events are initiated by the Milan City Administration (Comune di Milano) or National Chamber of Italian Fashion (Camera Nazionale della Moda Italiana) which is a nonprofit organization founded in 1958 as state funded institution, whose goal is to coordinate and promote Italian fashion, especially it aims to strengthen its image in Italy and abroad. The association is actively involved in preparation of these spectacular events, scheduled fashion shows, presentations, related events. Moreover, the institution is responsible for creating the image, collaborating with other organizations, creating stage settings and installations for Centro Sfilate, acting as a press office, coordinating special events, meetings and conferences.

The board of directors of the Chamber consists of the relatives of famous Italian designers like Anna Zegna, Vittorio Missoni, Giovanna Gentile Ferragamo (Camera Nazionale della Moda Italian, 2010).

4.1.1. Milan Fashion Week

Milan hosts two biannual seven day fashion weeks which together with similar events in Paris, London and New York are the 'world premiere fashion events' (Jansson&Power, 2010). Fashion week is held several months ahead of the season in order to display a preview of what fashion designers offer for the buyers. Since the event is not easily accessible, the fashion week enjoys a unique reputation and it is a point of aspiration of many fashion victims. It gives an opportunity not only to become familiar with the new trends but also to see 'the best looking celebrities'. Among the participants in September 2010 were Megan Fox, George Clooney, Heidi Klum, Leona Lewis (Daily Mail, 2010).

Milan Fashion Week is based on two biannual fashion events. The first major event is Milano Moda Donna, which is the most famous ready-to-wear fashion event. In September the Spring/Summer collections are presented whereas in February the Autumn/Winter collections are featured. Milano Moda Donna not only hosts many fashion events but also acts as a stage where specialized agencies can set their presentations. During the event over 230 high quality fashion shows and presentations are displayed, attracting circa 2,500 press representatives from Italy and abroad and over 15,000 buyers (Mengotti, 2010). For Autumn/Winter 2008-2009 there were 103 catwalk shows and 137 collection presentations scheduled for eight days. The events during Milano Moda Donna are usually located at the Centro Sfilate, in via Gattamelata in Milan. The place consists of large halls in the center of which there is a 'piazza' with a large video screen where the public can enjoy watching the fashion show in real time (E-Italy Business, 2010).

The other major event within Milano Fashion Week is Milano Moda Uomo which presents ready-to-wear collections devoted to men created by most prestigious Italian fashion designers. The Autumn/Winter collection is presented in January while Spring/Summer collections are introduced in June. The Milano Moda Uomo shows attract over 1,000 journalists from all over the world and approximately 10,000 buyers. The events within Milano Moda Uomo

are located in various places in Milan's city center, depending on the fashion companies' preference (Mengotti, 2010).

Summing up, the fashion week is the most important event in relation to fashion business and has a crucial role in perceiving the city a fashion capital. This kind of events is mainly devoted to elites and press, therefore it is characterized by a high level of exclusivity. Ordinary people cannot enter the event if their name is not mentioned on the guest list. Keeping the Fashion Week very exclusive entails exclusion of vast majority of people interested in Fashion of taking part in the event.

Milan Fashion Week

4.1.2. Fashion fairs and exhibitions

Fiera Milano

The most of the fashion fairs in Milan take place at Fieramilano exhibition center designed by a famous Italian architect Massimiliano Fukas. The place which covers a surface of 2 million sq meters, was set up in approximately 2 years at a cost of 755 million euro from the Fiera Milano Foundation. Currently Fieramilano it is one of the largest exhibition centers in Europe occupying 345,000 m2 gross covered area and 60,000 m2 outside**.** The center is located in Rho-Pero district, the suburban area (Milano Metropoli, 2010).

Milano Unica

Milano Unica is an international event presenting high end fabrics and accessories. Milano Unica is held twice a year, in February and September displaying the products from the finest Italian and European textile manufacturers. The textile fair was created basing on the broad experience, quality and prestige of four Italian exhibitions which have been presenting the finest textiles created for various occasions. The name Milano Unica represents the three essential characteristics of the textile fair. Unica is synonymous with singular, exclusive, united (Milano Unica,2010). The fair consists of: Idea Biella, prestigious menswear fabric collections, Ideacomo, exclusive fabrics for women's wear, Moda In, Fabrics & Accessories, established in 1984 by the Italian Textile Association and the Italian Federation of Various Textiles and Hat Manufacturers to promote Italian and European textiles throughout the Word (Moda In, 2010).

Moda Prima

Moda Prima is the "International Fashion and Accessories Collection Show" in Milan (Salone Internazionale Moda e Accessori), presented and organized by Pitti Immagine, the company organizing fashion events based in Florence. Moda Prima takes place in the Portello area of Fieramilanocity each 6 months. In 2010, the number of trade operators that attended the 3 day event reached over 1,640 which constituted a 17% increase in comparison to the 2009 summer edition. Moda Prima is one of the most attended international fashion events, involving visitors which represent around 45 countries. Among the highest attending countries were Japan, with a delegation of 147 buyers, followed by Portugal, Spain, Russia, Turkey, France, Greece, Belgium, Switzerland, Germany, Hong Kong, the Czech Republic, the United Kingdom, Poland and the United States (Pitti Imagine, 2010).

Milano Prêt a Porter

Milano Prêt a Porter is the successor of Milanovendemoda which in 2009 celebrated its 40th anniversary by offering exhibitors and visitors a number of novelties that will make the famous fashion event even more appealing and comprehensive, richer in propositions and contents. Mi Milano Prêt a Porter is aimed at supporting new designers with the help of big Italian brands. The name of the event evokes the central role of Milan in the fashion and design industries related to ready-to-wear. The aim is to 'boost and restore the allure of Milan as the Fashion Capital, and the two drivers for development shall be innovation and internationalization' (Mi Milano Pret a Porter, 2010). As indicated by the head of the organization the goal is to promote 'Made in Italy' and to involve the city and its inhabitants.

Micam Shoevent

Micam Shoevent is a trade fair organized by Italia Association of Footwear Manufacturers- ANCI, which presents medium to high level collections presented by footwear companies from all over the world. For the collection Spring/Summer 2011 there were approximately 1600 exhibitors, of which 580 foreign (Fiera Milano News, 2010). The exhibition is held twice a year in Milan in the new fairgrounds of Rho Fiera, offering a preview of the Spring/Summer and Autumn/Winter collections of the following year. The Micam Shoevent involves a wide range of quality goods, design and innovation. The fair acts as a platform that combines business, glamour and communication, enabling the establishment of tangible commercial contracts (Micam Shoevent, 2010).

Mipel

Mipel is an international leather goods and accessories fair**,** with approximately 30,000 square meters of exhibition area, displaying bags, luggage, umbrellas, accessories and articles like wallets, diaries and small leather goods an hosting over 400 exhibitors and 20,000 trade visitors, 200 accredited journalists. Significantly more then the half of the visitors comes from overseas, which proofs its international profile (Mipel, 2010).

Mifur

Mifur is the international fur and leather exhibition, established in 1996 from the initiative of Association of Italian Furs. Its purpose is to promote trade in a fur sector while supporting the image of the product. Mifur is hosted at Fiera Milano within the context of events dedicated to winter collections. The exhibition is open exclusively to the professionals. The trade fair is primarily oriented towards promotions of the events for media, opinion leaders and business operators (Mifur, 2010).

Intertext Milano

Intertext Milano is the international textile trade show organized in Italy, accessible for producers and exporters from all over the world. During *Intertext Milano*, a selection of exhibitors form 22 countries, particularly manufacturers of fabrics for women's, men's and children wear, laces, embroideries, knitted and woven fabrics but also accessories, yarns, clothing. Similarly to other textile exhibitions *Intertext Milano* is just open to trade operators, there is a free entrance for professionals. The targeted audience involves clothing industrialists, distributors, agents, importers, wholesalers, manufacturers, converters, designers. The event is not open to the wider public (Intertext Milano, 2010).

Now Fashion Exhibition

Milano Fashion Now is a platform for companies presenting men, women and accessories collections with a high fashion content that deliver the product quickly to the stores-fast fashion, moreover they offer seasonal packages, re-ordering opportunities. The main goal of N.O.W Fashion Exhibition is to present the high quality offers for cautious buyers allowing them to express their concern. The exhibition enables the total visibility to the companies that display their products. The part of the collections comes from the collectors from Northern Europe, Middle East, and Far East, in total the fair attracts 20,000 buyers. The targeted visitors include fashion houses, manufacturers and sellers of clothes and footwear, trade visitors, wholesale and

retail agents, exporters, distributors and journalists (Fiera Milano, 2010, Milano Fashion Now, 2010).

Conclusion

The main characteristics of fashion fairs taking place in Milan are specialization, exclusivity and limited accessibility. The goal of the fairs is to attract professionals and people having direct links with the industry who would be willing to buy or sell the products. The other targeted group are the journalists and opinion leaders whose attendance brings publicity in media. The low frequency of the expositions (mainly twice a year) increases its exclusive character. The Milan Fashion Fairs are the international events, what is often emphasized on the institutional websites. The fairs are not directed to young people, the possibilities to average student to attend the fashion fair are extremely limited without previously made contacts within the business.

International Fashion Fairs and Exhibitions

4.1.3. Artistic and Cultural Events linked to fashion.

Milano Loves Fashion

Milano Loves Fashion is an event organized by the Municipality of Milan in September 21-28 during Milan Fashion Week. The purpose is to expand the reach and diversify the event with the calendar of activities that are open to the wider public. As given by Giovanni Terzi, the Councilor for Fashion, Design and Events and promoter of the event; Milano Loves Fashion gives an opportunity to experience fashion week by all people. The goal is to bring Milan to its role as a leader of the Italian style in the world through interaction of private and public institutions with customers and by expressing the peculiarities of Made in Italy (Fashion & Runway, 2010).

As declared by the Municipality of Milan Milano Loves Fashion was founded to promote and emphasize fashion in Milan, which is fundamental industry for the economy of the city as well as an important international asset. This is an underlying reason for creating events linked to fashion open to the public (Comune di Milano, 2010).

Among the most popular events are:

Tribute to Fashion: a gala at palazzo Marino transformed to a botanical garden with the presence of many celebrities. The most interesting part of the event is a display of twelve macro copies of the 180 cm high bottles of coca cola light contour dressed up by famous Italian fashion designers Giorgio Armani Armani Jeans, Massimiliano Giordano Salvatore Ferragamo, Tommaso Aquilano and Roberto Rimondi for Gianfranco Ferre. The money raised on the project will be donated to the Foundation Marzotto for Cystic Fibrosis and for the help for the people affected by the earthquake in the Abruzzo region (Coca Cola Conversations, 2010, Comune di Milano, 2010).

The dream is coming- the exhibition presenting the works of art by Salvador Dali, the exhibition explores the relationship between landscape, dream and desire. The event is organized by Commune di Milano with the collaboration with National Chamber of Italian Fashion (Milano Alberghi, 2010).

Fashion & Design 2.0 – involves the two of the leading journals, Grace and Interiors covering issues related to Italian fashion, presenting performances, installations and interventions that show various connections between fashion and design. The event is located in the Octagon, a historic square in Galleria Vittorio Emanuele (Comune di Milano, 2010).

Taste of Milan – a food event hosted at Parco Sempione where a temporary restaurant is established involving the best chiefs in Milan. Moreover, during the event, live performances for the haute-cuisine dishes are presented (Taste of Milano, 2010).

OPS! - Schools of Fashion Open – a fashion event during which 9 fashion schools will be open to the visitors, showing exhibitions, video productions and showcases regarding the excellence of their students. Apart from exhibiting the works of students, Milan organizations offer temporary corners where the visitors can buy clothing collections or accessories designed by famous alumni (Comune di Milano, 2010).

The Show – one of the most famous fashion shows open to the wider public located at Piazza Duomo. The evening involves international artists and musicians performing under the artistic direction of Ennio Capasa, the designer and creator of the mark. The evening is promoted as a unique moment to enjoy the most spectacular and exclusive expression of the fashion business through various languages of fashion (Fashion&Runway, 2010).

SillOut – hosted in Milan Triennale related to sustainability and media. During the event famous musicians give concerts. In order to make it more interesting, the walls of the building are decorated with the images form National Geographic (Comune di Milano, 2010).

Era di Moda- the exhibition at Castello Sforzesco displaying the posters related to the history of fashion and fashion trends from the late nineteenth century to the thirties of the twentieth century. 'The Age of Fashion…elegance in Italy according to historic poster of Raccolta Bertarelli', features 27 posters in a large format showing a chronological journey and iconography of the past times, the evolution of tastes, customs and language of advertising in Italy. The event is organized by the Municipality of Milan in cooperation with Comieco (National Consortium for the Recovery and Recycling of Packaging in Base cellulose), GPP Industrie Grafiche di Milano,

and Friends of the Collection of Prints "Achille Bertarelli". The aim of the events is to better unite the excellence of Italian fashion, design and cultural wealth (Castello Sforzesco, 2010).

One size fits all – an exhibition displayed during Milan Fashion Week. Organized by Ivano Atzori – a notorious graffiti artist who asked nine worlds famous fashion designers (e.g. Vivienne Westwood, Missoni, Raf Simons to design a mask for the exhibition (Vogue, 2010).

Projects aimed at supporting emerging designers:

Fashion incubator- the project gives an opportunity for young fashion companies to get a location in the Milanese headquarters of Incubatore della Moda, where there are offices, possibility of workshops, centralized secretarial service. The general goal is to promote the development of the microenterprises (Comune di Milano, 2010).

Who's on next? - the competition for the best emerging designer prize.

Conclusion

The events linked to fashion, organized mainly by the Municipality of Milan and its partners are accessible to the wider public, in comparison to the fashion fairs which have more exclusive character. Thanks to the fashion events that are entrance free, ordinary people can be a part of in-crowd and feel the spirit of the Milan Fashion Week. The events aim to promote made in Italy products, extend the reach of arts and culture into the fashion sectors and promote fashion and design students. Moreover, the attractions are organized in the central locations, in a close proximity to Piazza Duomo. Nevertheless, they are organized rarely, and are restricted to the occurrence of the Fashion Week. Additionally, these events are mainly publicized on the website of Milan City Administration, what poses limitations in reaching the targeted groups, including young international people interested in fashion and design.

Artistic and Cultural Events linked to Fashion

4.2. Retail clusters

The presence of the fashion fairs or promotional events linked to fashion is an important branding channel. However, it does not offer a real shopping adventure which can be only experienced through exploring the city's shopping areas, being directly exposed to fashion brands, fitting clothes and becoming familiar with the environment in which purchases are made.

In Milan, similarly to other fashion capitals fashion stores are geographically clustered in relation to their market segment. The potential reasons of special concentration of the shops belonging to the same fashion segment is targeting the same groups customers, networking and various possibilities in joint cluster marketing.

Shops in Milan range from expensive and exclusive boutiques offering items for the richest customers produced by the most sophisticated Italian and international names, through global retails chains like Zara and H&M, to locally handcrafted fashion and interior design and second-hand vintage. The city's shopping offer has a strong impact on visitors and residents,

however the offer itself is also 'subject to change and constant redirection' (Jansson&Power, 2006:900).

There are seven major shopping districts in Milan, located in different parts of the city. Among these districts are Duomo/ Corso Vittorio Emanuele, Quadrilatero d' Oro, Brera, Navigli/Ticinese, Corso Buenos Aires, Paolo Sarpi and Isola. All of these shopping clusters have different retail profile, distinctive offer and target different groups of consumers (ref. market segmentation pp. 21-23). In this subchapter the districts will be characterized according to the information found online involving tourist and shopping guides.
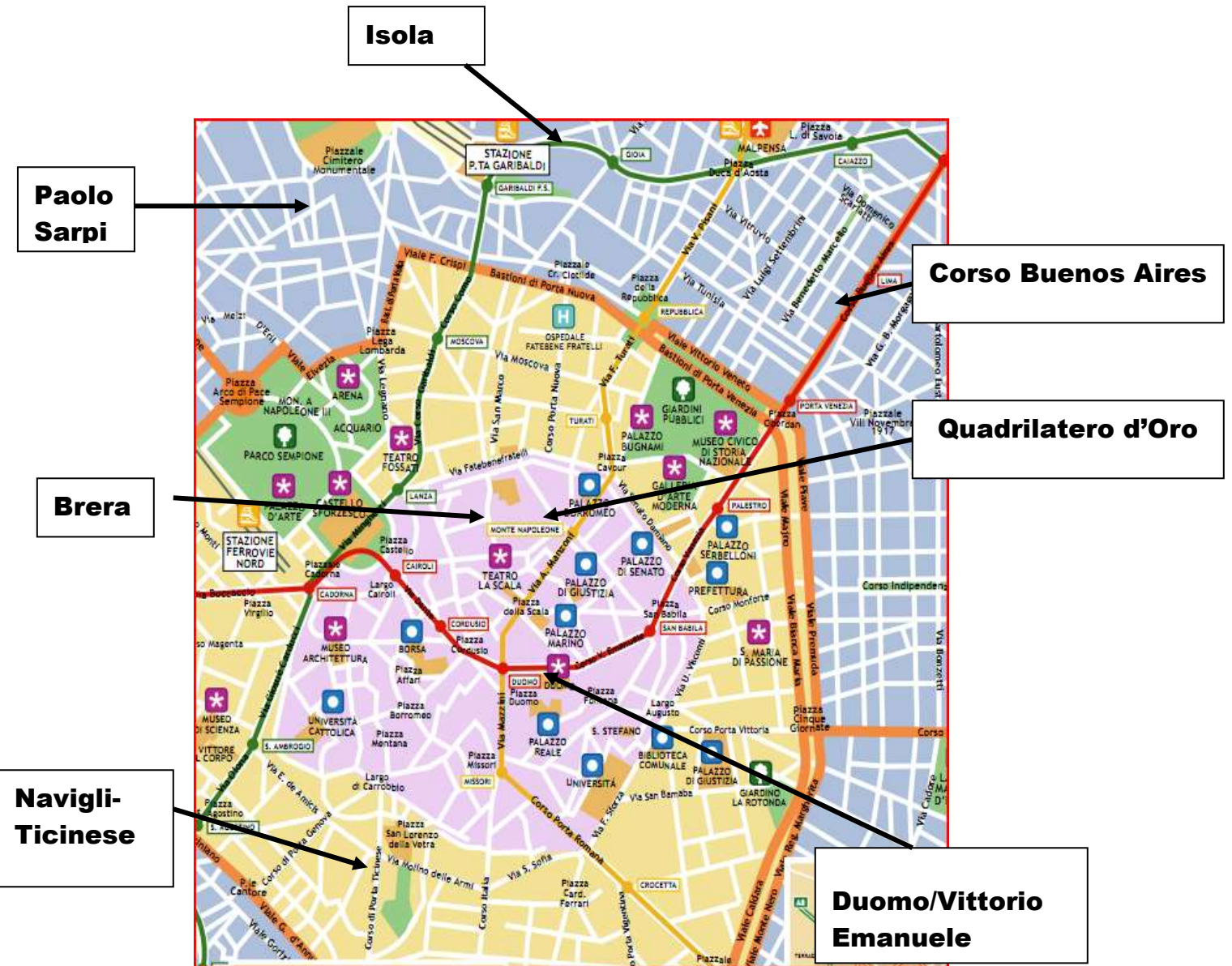
6: Retail clusters in Milan

4.2.1. Duomo/Vittorio Emanuele

Pizza Duomo situated in the heart of the city center, it is the major square in Milan and one of the most famous tourist attractions in Italy. The area includes such sites as the Duomo Cathedral, which is the second largest Catholic cathedral in the world, commissioned in 1386, by Gian Galeazzo Visconti; Royal Palace which accommodates the Museum of the Duomo and Milan's Contemporary Art Museum; Galeria Vittorio Emanuele - a historic shopping center. The area surrounding Piazza Duomo is marked by the presence of many famous places. Among them are; Via Mercanti - a common shopping street which connects Piazza Duomo with Piazza Cordusio; Via Mazzini with calm, charming atmosphere and Biblioteca Ambrosiana - a great repository of European Culture (Europe-Cities, 2010). Apart from cultural experience, the area surrounding the Duomo Cathedral offers brands for average income customers, shoppers can find there the majority of the most popular mass retailers.

Nevertheless, in the same area the customers' shopping experience can become more luxurious and glamorous when they walk through Galleria Vittorio Emanuele, possibly the world's oldest shopping mall built in 1870 and called Salloto di Milano which means 'The Milan Lounge' (www.360cities.net). The galleria consists of coffee shops, restaurants, bars, boutiques and historical bookshops. Moreover, there are small galleries that surround the old church of San Vito al Pasquirolo, what gives an opportunity for a unique cultural experience. The place is full of Milanese and visitors from abroad, people in different age and social levels (Ciao Milano, 2010).

The other significant place for shopping is La Rinascente-the department store founded in Milan in 1985 by Luigi and Fernando Bocconi. The store operates through clothing, household and beauty products. La Rinascente functions only within Italy, reaching 12 owning a chain of 13 stores located in major Italian cities and one concept store branded Jam (La Rinascente, 2010). The Rinascente restyling as a shopping destination of designers' brands (90% of the assortment), started in 2007 and has brought to an increase of visitors' number at an average of 200,000 per day. Foreigners tourists have quintupled and now total 20%. The store has 7 divisions; cosmetics, men, women, young, home-collections, food, travel among which the top performing are food and women accessories. The department store puts a great attention to the whole experience

related to shopping. Nevertheless, the target market are people with high average income, the offering includes mainly designer brands Similarly to Galeria Vittorio Emaunele it is characterized by a high level of exclusivity.

Selected brands: Motivi, Kiko, Aerosoles, UCB, Nadine, Salmoiraghi & Vigano, H&M, Zara, Calzedonia, Golden Point, Stefanel, Sisley, Oviesse, Bruno Magli, Pollini, Tenezis, Max Mara

Summary

The area is mainly presented as a touristic and historic place, a perfect location for sightseeing but also for shopping. The offering in terms of shops is diversified, from mass retailers to luxury brands, so that everyone can find something accordingly to how much he or she is willing to pay. The area attracts various groups of customers, however it can be noticed the majority of customers are international. Moreover, it involves various product end uses from external clothing to underwear and sportswear. The district is convenient due to its central location and being highly reachable by the public communication system (the metro line situated in the middle of the Piazza). The disadvantage of the area is lack of the unique offering.

Duomo/Corso Vittorio Emanuele

4.2.2. Quadrilatero d'Oro

The area in Milan named Fashion Quadrilateral (also Golden Quadrilateral) consists of four streets: Via Montenapoleone, Via Allesandro Manzoni, Via Della Spiga, and Via Sant Andrea. The area involves the stores of the major fashion designers, design studios, contemporary art galleries and private banks. Quadrilatero d' Oro is oriented towards an exclusive group of consumers coming from around the world. The area is called 'a Mecca for the world's fashion addicts', providing world's best known luxury labels and offering 'truly unique shopping experience' (Europe-Cities, 2010).

The most famous among the four streets establishing the Golden Triangle of fashion is via Montenapoleone. After the World War I, Via Montenapoleone strengthened its position as a street of luxurious residences, reach families, antique shops and jewelers. In 1980s the extravagance of the area attracted people from show business and politics, offering fascinating galas, fashion shows and press conferences. The street became an icon of fashionability and style (Via Montenapoleone, 2010). Nowadays, Via Montenapoleone is a strong competitor of other similar shopping areas like Champs Elyse in Paris and the Fifth Avenue in New York. The area gives the sense of 'confined exclusivity', reinforced by narrow streets and lack of large scale institutions, the characteristics that distinguish the area from open, wide retails streets in other Fashion Capitals.

Selected brands: Via Montenapoleone: Gucci, Valentino, Versace, D&G, Stella McCartney, Armani, Chanel, Hermés**,** Prada, Bulgari, Emilio Pucci, Roberto Cavalli, Kenzo, Sergio Rossi, Maison Martin Margiela

Summary

Quadrilatero d'oro is a luxurious area, attracting bussinessman, high income cutomers or window shoppers. The product end uses involve mainly special occasions (banquets, VIP parties etc). The area offers a real exclusive and unique shopping experience, containing brands from ready-to-wear or demi- couture fashion segment.

Quadrilatero d' Oro

4.2.3. Brera

Brera, **'**one of the most evocative districts in Milan', 'includes Via Brera, Via Solferio, Via Pontaccio, Corso Garibaldi Palazzo Brera, and Corso Como 28, that is the home of famous Pinacoteca de Brera. The district, populated mainly by artists and bohemians, is characterized by narrow streets clustered around the Brera Academy and an Italian daily newspaper - Corriere della Sera (Ciao Milano, 2010). The shoppers can find there many interesting boutiques of ladies apparel, curiosity shops and antique shops. Brea is described 'as the 'luxury bohemian' and 'one of the most exclusive and fashionable places' in Milan (Made in Italy, 2010). The atmosphere of the district resembles the artistic spirit of Paris, where visitors can enjoy open air coffee shops and sophisticated boutiques. The neighborhood is characterized by a high level of symbolic capital, reflected in the local environment and in the urban shape of the area. This cultural value is strengthen by the Accademia delle Belle Arti and other institutions like art galleries and cafés. The Accademia delle Belle Arti is a particularly important place as for almost two centuries it is a main hub for artistic training and production in the city of Milan (Accademia di Belle Arti di Brera, 2010). Brera's exclusivity is related to its specific, artistic and cultural profile, unique offering which is distinctive from the luxurious, high end Quadrilatero d'Oro.

Selected brands: Atribu, Blunauta, Corso Como 10, Spelta, Meru, Arform, La Piccola Legatoria, Eleonora Scaramucci, Nir Lagziel,

Summary

Brera is an exclusive place, attracting people interested in arts and culture regardless of their age and income. Nevertheless, the stores in the area are expensive targeting mainly the connoisseurs of the unique, avant-garde items.

Brera

4.2.4. Navigli-Ticinese

The Navigli-Ticinese area is located in the south of Milan, in the close proximity to Bocconi University and Porta Genova. Ticinese is described as 'one the most exciting part of the city' due to its rich nightlife, whereas Navigli with its picturesque image, is known mainly due to the canals which give the area a romantic profile (Places On Line, 2010).

The Navigli area consists of Naviglio Grande and the Naviglio Pavese that 'make up one of the most charming places in Milan' involving antigue shops and clubs, and the most beautiful hotels and restaurants. The navigable canals in Navigli, built in around 1100, surrounded Milan until 1930, when they were covered by ring road. Afterwards, its purpose altered and their

acquired aesthetical function, which is the source of their economic value (Bovone, 2005). Nowadays, the canals attract the consumers of fashionable objects and those who want to dine in a nice atmosphere.

Navigli turn into Corso di Porta Ticinese, the other famous shopping street. Ticinese is a right place for alternative purchases, consisting of pricy second hand shops, stores with bizarre objects, handmade clothes and accessory stores. Ticinese is what Laura Bovone (2005:359) calls a fashionable quarter:

'.. an area undergoing deep transformation and consequently rich in many cultural components, where the circuit of fashionable goods is all simultaneously present: production, communication, consumption of nondurable design-intensive goods, and image related agencies and services.''

According to the author, in the 21st century the places in Milan influenced by contemporary culture 'are neither the large peripheral shopping centers nor the pedestrian areas of the shops surrounding the Cathedral (the Duomo), nor the glamorous and by now stabilized "fashion quadrilateral" bounded by Via Montenapoleone and Via della Spiga, but the so-called cultural quarters or "fashionable quarters". In these areas fashion is a main stimulus for the revitalization, improving the economic potential of the neighborhood. The employees in these sectors take advantage of local businesses involving clothing, bars, restaurants, bookshops and art galleries, photography and design studios—'where everybody is producer and consumer at the same time' (Bovone, 2005: 360). Ticinese is a cosmopolitan district, great place to taste the global ethnic food involving the best gelato in the city. In summer, the students can gather at Collone de San Lorenzo, the best known Roman ruin in Milan, when they can enjoy their time, have a drink and talk to each other until late night hours.

Selected brands: Custo-Barcelona, Diesel, Miss Sixteen, Gas, Fornarina , Anna Fabiano, Biffi, Cavalli e Nastri,Bargo Albina, Marilena Lazzari,

Summary

Navigli-Ticinese is a popular, avant-garde area attracting mainly young people who want to have fun, taste some local cuisine, or just relax after a tiring day. In the area it is difficult to find the most famous luxury brands neither popular mass retailers. The area is suitable for shoppers who want to look original and stylish but also have higher purchasing power as the majority of shops belong to diffusion or bridge fashion segments.

Navigli/ Ticinese

4.2.5. Corso Buenos Aires

Corso Buenos Aires is 'a communication artery' connecting the city center with the small business and large scale industrial districts to the North of Milan. It is the biggest shopping street in the city and one of the largest in Europe. Moreover it offers the densest concentration of textile shops in the continent, offering lower prices in comparison to the luxurious Quadrilatero d'Oro. Corso Buenos Aires contains over 350 retailers that involve various fashion segments ranging

from high end, big fashion houses to small historical handicraft shops and mass market goods (Ciao Milano, 2010).

The shopping district is the hub for cheap and stylish outfit, where the shoppers can find hip shoes, clothes and accessories. The area is promoted as one suitable for families and youngsters, very famous for shopping especially during Christmas. In fact, the area is quite popular, however not as much as Via Torino (located in close proximity to Piazza Duomo) which offers the same brands but it better located. The advantage of the area is the possibility to find some outlets and purchase clothing and accessories on the discounted prices. The disadvantage is the location, as the area is not situated in the close proximity to the city center.

Selected brands: Timberland, Mandarina Duck, Benetton, Bershka, Kookai and Nara Camice, Promod, Tincati, Zara, *H&M*, Mutinelli, Furla, Mostra del Poster, Marina Rinaldi

Summary

The area offers the possibility to find the most popular brands but also those with higher end. It is devoted mainly to young, fashionable people but with limited purchasing power and less spohisticated taste. The area is often crowded and offers mass experience.

Corso Buenos Aires

4.2.6. Via Paolo Sarpi

Vi Paolo Sarpi is the main street in Milanese Chinatown, named after the well- known Italian academic Paolo Sarpi. The area is promoted as 'the most lively working class district in Milan', involving the shops that offer items at low prices, but of good quality (Ciao Milano, 2010). The street is populated mainly by working class, iron workers, glasscutters and carpenters. Interestingly, Paolo Sarpi is one of the longest streets in the city. Although the district consists of Chinese people and companies, the image of the area is described as cosmopolitan and 'multi-ethnical heritage'.

Beginning with the 1930s many immigrants from China came to the district and begun to populate the street. During 1980s the immigrant population decreased, and more foreigners came to the area. Nowadays, around 20% of the Chinese people living in Italy is gathered in the area. Paolo Sarpi is full of hairdressing salons, European and oriental fashion boutiques, silk and weather stores, Chinese bars and restaurants. The area is promoted as one of the most popular tourist attractions and one of the liveliest streets of Milan, offering variety of 150 stores with rich assortment (Via Paolo Sarpi, 2010).

Selected brands: Andrea   (boutique- emerging designers), Bardelli- vintage, Extro' Love couture, Libero Milano, Liliana Basile- clothing plus accessories, Max Davoli, Volpe- kid's wear, Ting sing bags, Timberland, Max Mara windows, Feltrinelli bookshop, Giudici optician

Summary based on own observation:

Paolo Sarpi is an interesting shopping area, offering variety of products in low prices. The area focuses mainly on Chinese products with original concept. In fact, the area is lively, however it is not popular among international customers. The advantage of the area is a possibility to find unique goods and bargains. The disadvantage is that it is not possible to fit the clothes on in the shop.

Via Paolo Sarpi

4.2.7 Isola

Isola is an area located in the North of Milan, behind the Garibaldi train station. The name of the district is derived from its split from the city by a railroad, indicating that the area is quite isolated. In fact, the area was regarded as an 'old and shrinking industrial district'. The main characteristics of Isola are low and irregular blocks and squares with weekly markets and small shops, the characteristics which distinguish it from the commercial areas of the city. Recently, the district was regenerated with a new identity, populated by young artists and immigrants who keep it alive. The area is regarded as fashion island in the island, which has a deep ethical imprint, acting as a lab, a showroom, an exhibition location, a commercial art studio, a meeting point for creative people, graphic and fashion designers, artists, copywriters and silk screen printers (Milan Unlike. 2010). For decades, the area was characterized by a high concentration of factory workers, moreover until a few years ago it was the shelter of the Milanese underworld.

Currently, the area is undergoing a regeneration process. One of the revitalization ideas linked to fashion was the foundation of Citta Della Moda, The Fashion City. The project involved the fashion center, university, a modern area of shops, hotel, residential apartments and the museum with the exposition of designers who had their input in rise of Made in Italy (International Herald Tribune, 2004). The first purpose was to invest in fashion in order to reinforce the reputation of Milan internationally and to invest in what could be the biggest strength of the city. In order to do this, the area Garibaldi – Isola seemed perfect to create a center from which Milan could create a network with all the actors involved such as universities,

associations and designers. The project had a potential to increase the quality of life in the area by stimulating creativity and innovation. Unfortunately, the original concept Città della Moda" has been partially abandoned because the Municipality lost its interest in investing in fashion industry in that area. Some ideas of Citta della Moda are incorporated into broader cultural plan − Porta Nuova[5].

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Selected brands: Laboratorio della Moda, So Stylish- boutique vintage, Luxor Vintage

Summary based on own observation.

Isola is promoted as an artistic, underground district with a doze of folklore. The area is welcoming towards community of immigrants, skilled workers and students. The stores in the area are small with local concept. Currently, Isola has been undergoing regeneration process which has a temporary negative impact on the local shops in the area as due to many constructions, the shopping scenario is not visually attractive.

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[5] The project is one of creative initiatives to regenerate neglected area of in the area Garibaldi-Repubblica, involving Corso Como and Isola. It consists of a residential zone, various services, new offices of Municipality and Regione Lombardia, cultural institutions (also those linked to fashion; like MODAM, the Museum of Fashion), and well designed park. Moreover it provides the so called "Biblioteca degli alberi", a project that should occupy 85.000 m^2 created with the idea to realize a botanic library. The overall project involves many important designers such Pelli Clarke Pelli Architects, Kohn Pedersen, Fox Architects and Boeri Studio. In total new developments will occupy the area of 290.000 m^2 and the project supposed to be accomplished by 2012 (http://www.porta-nuova.com/en/home/).

Isola

4.3. Word Fashion Capitals

4.3.1. 'The Big Four'

Milan alongside with New York, Paris and London is holding a status of one of the major World Fashion Capitals. The status of 'the big four' is based on the fact that the above mentioned cities are the major hosts of the prominent fashion weeks. It might be problematic to indicate which city is the ever-lasting top capital as the evaluation is often subjective based on personal experience or image. Throughout last decades each of these cities had time of its ups and downs. Since 1950s these cities have been fiercely competing with each other in setting trends, gaining media attention, publicity, attracting customers etc. As the result the multiple rankings and competitions have been raised in order to rank the cities. Although, the positioning of these cities in various order changes for one year to another they hold top places. There are more cities emerging as fashion capitals like Sao Paulo, Hong Kong that are getting more and more attention however the prominent status of the big four seems to be timeless.

The purpose of this subchapter is to briefly present the main competition of Milan, by describing the key characteristics of the fashion industry in these cities promoted in media.

	Paris	New York	London	Milan
Main organizational body	French Federation of Fashion and of Ready-to-Wear of Couturiers and Fashion Designers	Council of Fashion Designers of America	The British Fashion Council	National Chamber of Italian Fashion
Dominating Promotional Event	Paris Fashion Week	New York Fashion Week	London Fashion Week	Milan Fashion Week
Brands/ Designers	Chanel, Dior, Louis Vuitton, Yves Saint Laurent,	Calvin Klein, Ralph Lauren, Tommy Hilfiger, Abercrombie	Burberry, Alexander McQueen, Vivienne Westwood	Armani, Versace, Prada, Dolce&Gabbana
Shopping districts/ streets	The Golden Triangle: Champs Elysees, Avenue Montaigne, Avenue Marceau, Boulevard Haussmann, Quartier Latin - Boulevard Saint Michel and Saint Germain des Pres, Louvre Area - Rue di Rivoli, Rue du Faubourg Saint Honore	Upper East Side: Fifth Avenue, Madison Avenue, 100 Third Avenue, Herald Square, Soho, Chelsea/ Meatpacking district, Nolita-Little Italy, Chinatown	Oxford Street, Carnaby Street, Knightsbridge, Regent Street, Bond Street, Notting Hill, Camden Town	Duomo Corso Vittorio Emanuele, Quadrilatero d'Oro: Via Montenapoleone, Via Manzoni, Via della Spiga, Via Sant Andrea, Brera, Navigli-Ticincese, Corso Buenos Aires, Paulo Sarpi, Isola

Figure 7: The 'big four' fashion capitals

Paris

The position of Paris as a fashion capital is promoted by the Fédération française de la couture, du prêt-à-porter des couturiers et des créateurs de mode (French Federation of Fashion and of Ready-to-Wear of Couturiers and Fashion Designers) the main institutional body in the French fashion industry (Mode à Paris, 2010). By an large, Paris is known for *haute couture*, high-end fashion designers like Dior and Chanel, sophistication, having a long history in the fashion industry that reach back to 1860s when Charles Frederick Worth opened his first couture house in Paris (Corbellini&Saviolo, 2009). Paris is still one of the major shopping destinations in the world- involving the most expensive shopping district in Europe- Avenue the Champs Elysees (www.trifter.com).

Paris fashion

New York

New York, probably the most famous and international city in the world, does not have long history in fashion, however there are specific assets that make the city a leading world fashion hub. The status on New York is enhanced by Council of Fashion Designers of America (CFDA), the organization that endeavors to advance the position of fashion in American culture. In fact, New York fashion reflects American lifestyle. The fashion is often promoted as the one that set trends in fashion and where all the ideas are originated. New York is also promoted for a concentration of talent, shopping clusters and fashion design schools (e.g. Fashion Institute of Technology, LIM College, Parsons the New School for Design (www.nycfashioninfo.com).

New York fashion

London

The British Fashion Council is an institutional body that enhances an 'international, cultural and creative reputation' of British fashion and overall excellence in fashion design, thus contributing to development of London as a fashion capital. London is mainly promoted as a fashion city due to setting up fashion trends and statements, variety of styles, specialization in fashion education and being a hub of innovation (London in Vogue, 2010).

London fashion

5. Brand Image – the findings from the questionnaires

The aim of the research is to study the relation between Milan's brand identity as a fashion capital and its perception as such by international students. This chapter aims to present the image of Milan according to the city's evaluation by the students coming from different parts of the world. In order to answer the research question several sub questions were set out in the methodology: Which of the branding channels are the most/least effective? In which areas Milan could improve in order to be perceived as a fashion capital? What is the overall evaluation of the shopping experience and shopping areas? What is the position of Milan among other fashion capitals? Is a status of a fashion capital a main driver to come to study fashion in Milan? What is the relevance of fashion as a main concept associated with Milan? What is the difference in perception of Milan by people from different cultural/geographical backgrounds?

This section aims to review the findings with regards to the above mentioned questions.

5.1. The effectiveness of branding channels.

5.1.1. The factors influencing the perception of Milan as a fashion capital

The respondents indicated to what degree (from 1– strongly disagree to 5 - strongly agree) they believe that Milan could be considered a fashion capital thanks to the presence of 5 distinctive factors indicated in Figure 14. The mean of responses and the standard deviation for each factor were calculated.

	Strongly agree	Agree	Neutral	Disagree	Strongly disagree	Response Average	St.Dev.
Thanks to the presence of **Fashion Weeks**.	6	7	33	110	129	4.2246	0,89
Thanks to the presence of many **artistic and cultural events** linked to fashion open to the wider public	8	26	84	118	51	3.6132	0,97
Thanks to the presence of internationally renowned **fashion fairs**.	9	15	70	119	74	3.8153	0,98
Thanks to the presence of internationally renowned **fashion brands**.	8	8	35	106	117	4.1533	0,95
Thanks to the presence of internationally renowned **fashion stores and specialized shopping areas**	7	18	56	86	107	3.9781	1,03

7: Why Milan could be considered a fashion capital?

The results based on the average of responses in terms of degree of agreement with each statement indicate that the most effective branding channel is the **Milan Fashion Week (4,2**), as this factor **garnered** the highest mean of positive responses. Namely the students on average agree or strongly agree that Milan can be considered a fashion capital due to the presence of the fashion weeks. The second highest average of positive responses was attributed to the statement that Milan can be considered a fashion capital due to **internationally renowned fashion brands (4,1**). The third ranked branding channel is the presence of **internationally renowned fashion stores and specialized shopping areas (3,9).** According to average of responses, the **internationally renowned fashion fairs (3,8)** are a little bit less effective in considering Milan as a fashion capital and the **artistic and cultural events linked to fashion** (3,6) are the least effective branding channel.

According to calculation of the standard deviation, the data is the most spread in relation to the students' evaluation of internationally renowned fashion stores and shopping areas. To compare with, the lowest standard deviation is noticed in relation to the evaluation of the Milan Fashion Week, indicating that the students are the most concurrent in that case. It should be mentioned that the differences in means as well as calculated standard deviations are small, meaning we should be cautious when evaluating them.

5.1.2. The areas in which Milan could improve in order to be perceived as a Fashion Capital

In the following question the respondents were asked in which areas they believe Milan should improve in order to be considered a fashion capital. The respondents indicated to what degree they agree that **Milan can improve in order to be considered a fashion capita**l in the areas mentioned in 5.1.1. The mean of responses and the standard deviation for each factor were calculated. The results are presented in Figure 15

	Strongly agree	Agree	Neutral	Disagree	Strongly disagree	Response Average	St.Dev.
Accessibility of Fashion Weeks.	3	16	39	71	145	4.2372	0,95
In the presence of many **artistic and cultural events** linked to fashion open to the wider public	2	14	39	74	133	4.2290	0,94
In the presence of internationally renowned **fashion fairs**.	12	32	72	104	70	3.6483	1,08
In the presence of internationally renowned **fashion brands**.	26	41	99	70	63	3.3445	1,02
In the variety of **fashion stores and specialized shopping areas**	18	41	63	86	58	3.4699	1,18

8:In which areas Milan could improve in order to be considered a Fashion Capital?

According to the mean of the responses, Milan could primarily improve in accessibility of the Fashion Weeks as on average the students claimed that they strongly agree or agree that **the Fashion Weeks (4,23)** should be more accessible to people interested in the fashion industry. Similarly, the high average of positive responses **(4,22)** can be noticed in relation to in the presence of **many artistic and cultural events open to the wider public**, which means that students agree or strongly agree that Milan can improve in this area. Significantly lower average of positive responses is related to the statement that Milan could improve in the **presence of internationally renowned fashion fairs (3,6) and in variety of fashion stores and specialized shopping areas (3,4).** This indicated that people are rather neutral in relation to this factor. The lowest average can be observed in relation to the statement that Milan could improve **in the presence of internationally renowned fashion brands (3,3),** which means that this area does not need much improvement. Similarly to the results obtained in figure 14, it can be noticed that the values are the most spread in relation to internationally renowned stores and specialized shopping areas, which means that the students' opinion is the most divided in relation to this factor. As in the case of figure 14, the differences in averages (as well as standard deviations) given for various factors are quite small.

5.2. Shopping experience in Milan

In order to evaluate the shopping experience in Milan the students were asked to indicate to what degree they agree with the statement that in Milan they can find all the big internationally fashion brands and whether there are stores and products with original and local concept. Furthermore, the same part involves a question about the students' level of concordance with the statement that the service offered in terms of both: the store opening hours and sales assistance are good.

5.2.1. Fashion stores in Milan

	Strongly agree	Agree	Neutral	Disagree	Strongly disagree	Response Average	St.Dev.
Thanks to the presence of **Fashion Weeks**.	6	7	33	110	129	4.2246	0,89
Thanks to the presence of many **artistic and cultural events** linked to fashion open to the wider public	8	26	84	118	51	3.6132	0,97
Thanks to the presence of internationally renowned **fashion fairs**.	9	15	70	119	74	3.8153	0,98
Thanks to the presence of internationally renowned **fashion brands**.	8	8	35	106	117	4.1533	0,95
Thanks to the presence of internationally renowned **fashion stores and specialized shopping areas**	7	18	56	86	107	3.9781	1,03

9**: The evaluation of fashion stores in Milan**

The highest average of positive responses is observed in relation to the occurrence of the **big internationally fashion brands (4,2).** The average of responses agreeing with the statement that in Milan there are **stores and products with original and local concept** is significantly lower **(3,5).** Furthermore, the average of responses in relation to the quality of **service offered in terms of sales assistance (3)** indicates that the students are rather neutral in this matter. Finally, the service offered in terms of **store opening hours is neutral or even negative,** which is indicated by the relatively low average of positive responses given for this factor **(2,8). The standard deviation is the lowest in case of the most positively evaluated factor – the internationally fashion brands.**

5.2.2.The overall shopping experience.

| very negative	negative	neutral	positive	very positive	Response Average	St.dev.
5	20	91	122	62	3,72	0,92

10: The evaluation of the shopping experience in Milan

The overall shopping experience: 3,72 (st. dev. 0,92). The overall shopping experience is rather positive, with the tendency to be neutral.

## 5.3. The evaluation of the shopping areas

The purpose of the following question was to evaluate seven main shopping areas in Milan. The students had to indicate which of the various characteristics can be considered as a main point of strength of particular areas. Among the possible choices were**: the exclusive image, the convenience, the opportunity to find the most popular brands, the young offer and the opportunity to find niche brands that nobody knows**. The students could also write down their own main point of strength of the area or indicate that they are not familiar with this particular area. The response rate varied depending on the area. The results are presented in the graphs below:

5.3.1. Duomo/ Corso Vittorio Emanuele

Which is the main point of strength of the Duomo Vittorio Emanuele area?
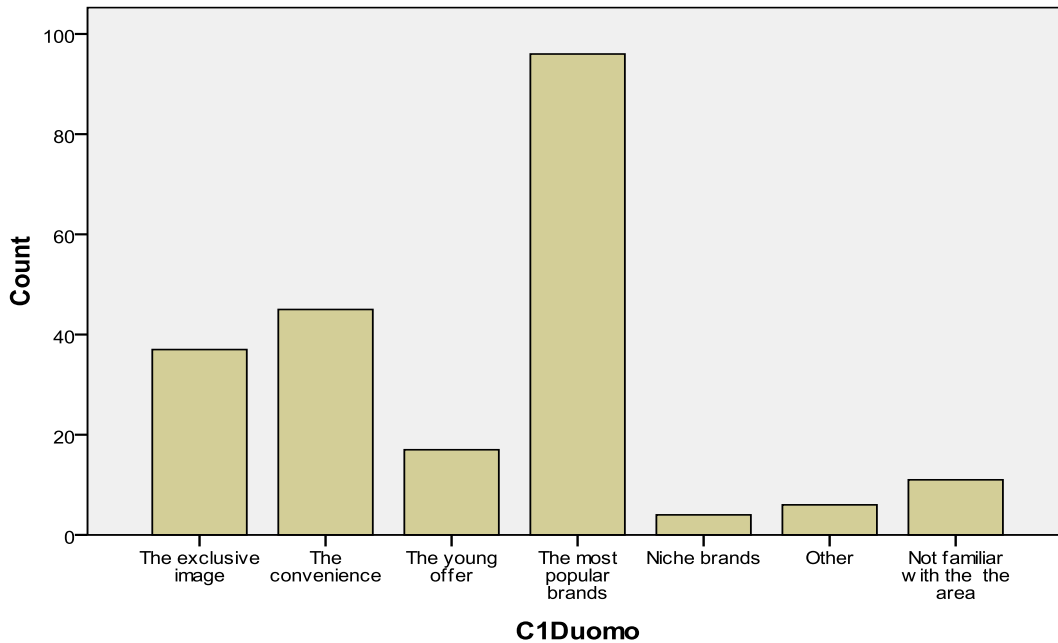
The most often indicated point of strength of the Duomo area is **the opportunity to find the most popular brands (96 answers).** Furthermore, significant amount of students indicated the convenience as the main positive characteristic of the area (45 answers) and its exclusive image (37 answers). The young offer (7 answers) and opportunity to find niche brands (4 answers) are not considered as the main advantages of the area. The familiarity with the area is high, only 11 students indicated that they are not familiar with the area.

5.3.2. Quadrilatero d' Oro (Fashion Quadrilateral)

**Which is the main point of strength of the Fashion Quadrilateral area?**
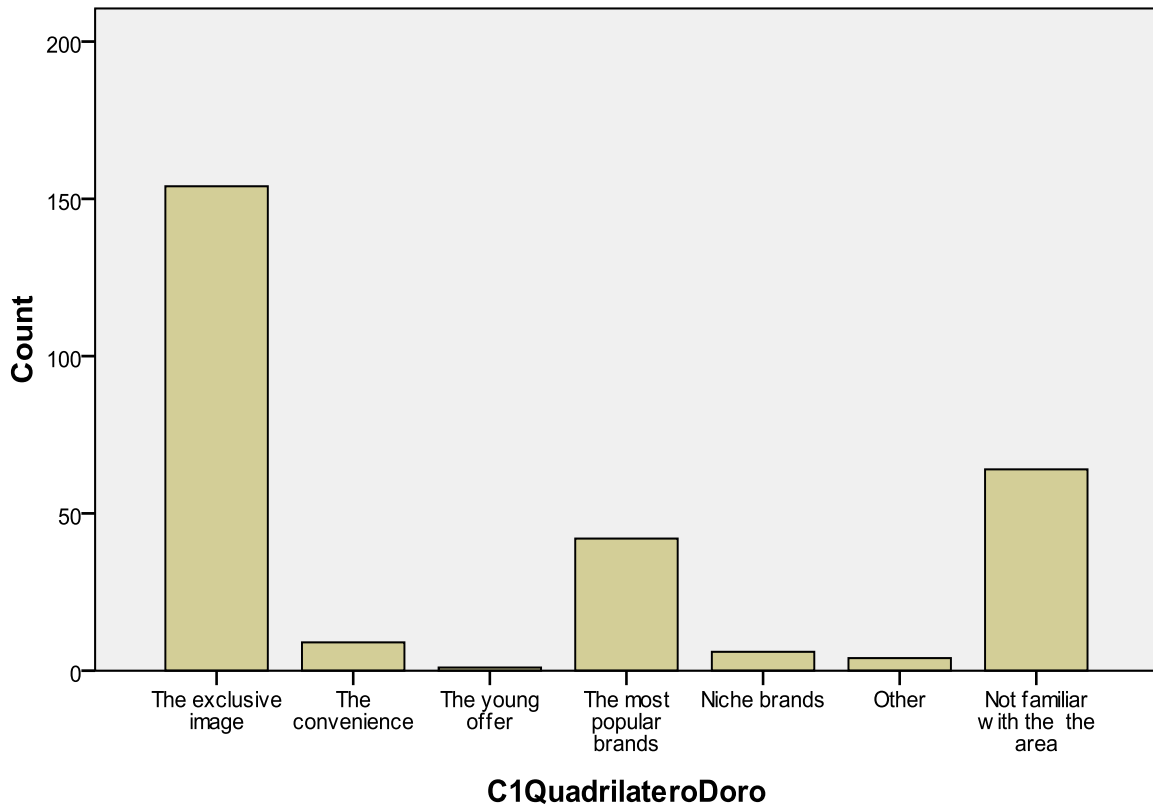
The Fashion Quadrilateral was the most often evaluated as an area having **the exclusive image (154 answers).** The other point of strength of the area, mentioned quite frequently was the opportunity to find the most popular brands (42 answers). The features like convenience (9), young offer (1), and niche brands (4) were just mentioned few times, which means they are not considered the main points of strength of that area. What is significant is the high unfamiliarity with the area, 64 students did not know about its existence.

5.3.3. Brera

Which is the main point of strength of the Brera area?
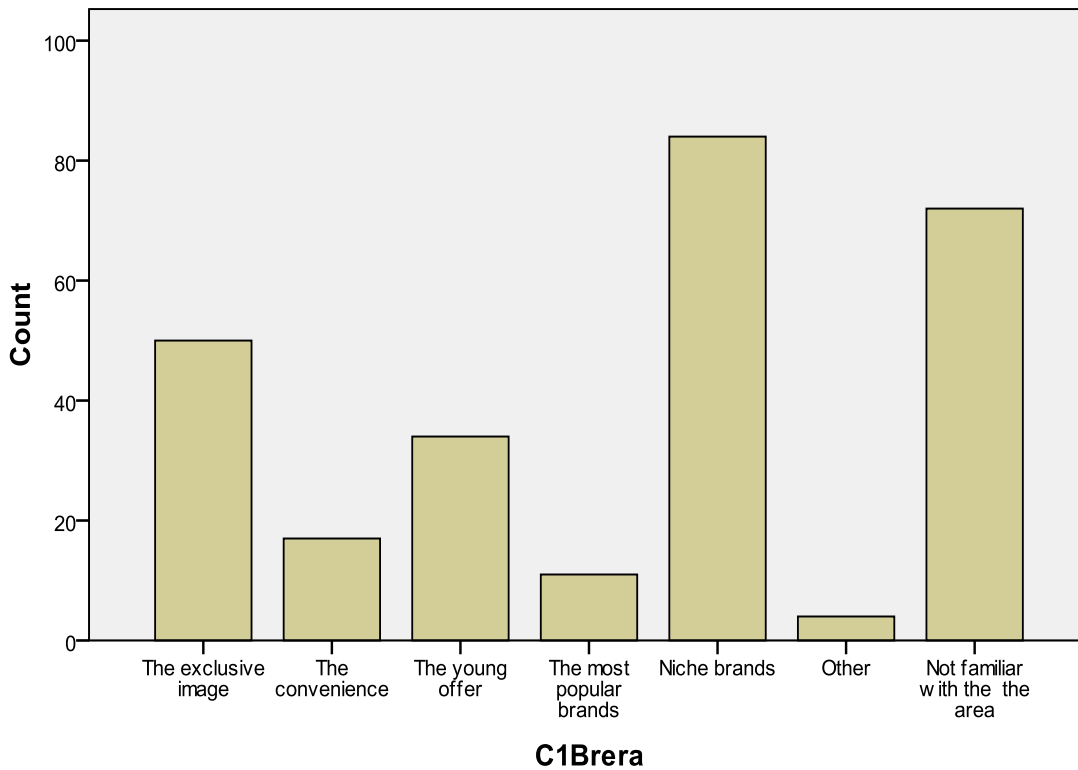
The most frequently mentioned point of strength of the Brera area was the opportunity to **find niche brands that nobody knows (84 answers).** Furthermore, the significant amount of answers was gathered by the exclusive image (34) and the young offer (34). The features that were not commonly regarded as the main points of strength of the area were the convenience and the opportunity to find the most popular brands. The area is quite unknown, 72 students indicated they were not familiar with the area.

5.3.4. Ticinese-Naivigli

Which is the main point of strength of the Ticinese-Navigli area?

C1NavigliTicinese
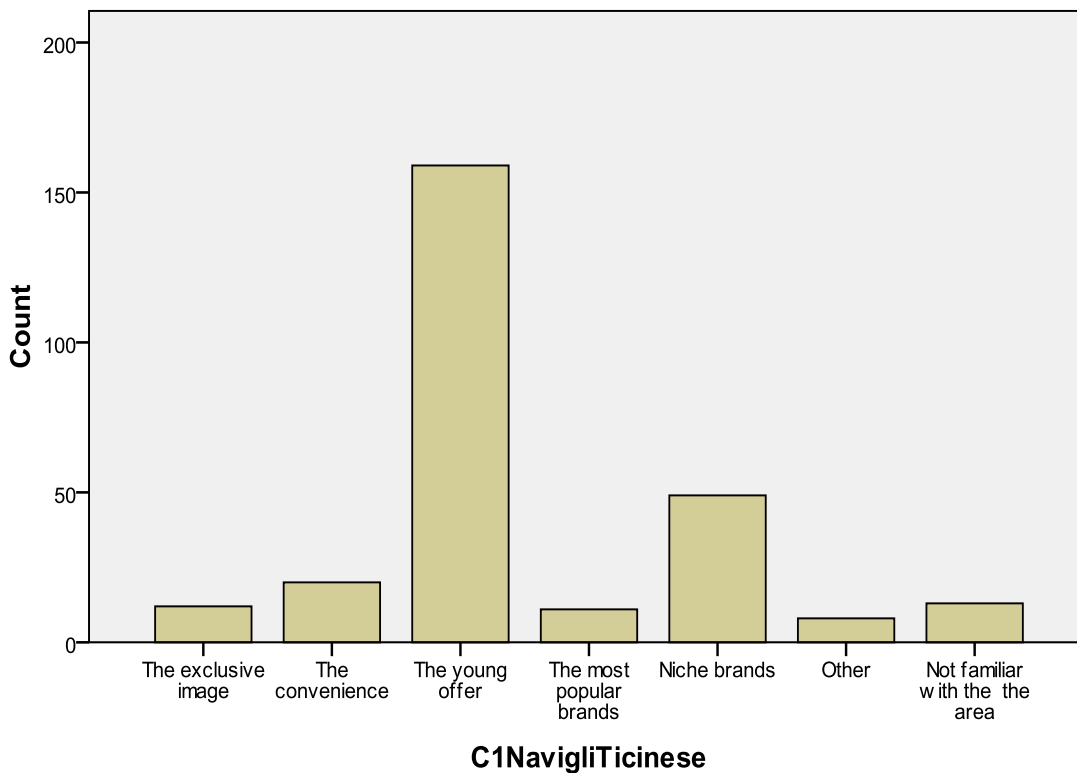
The main point of strength of the Ticinese-Navigli area **is the young offer (159 answers).** Another significant feature of the district is the opportunity to find niche brands that nobody knows (49 answers). The other features like the exclusive image (12 answers), the convenience (20 answers) and the opportunity to find the most popular brands (11 answers), were not commonly regarded as significant points of strength of the area. Importantly, there is a high familiarity with the area, only 13 students were not familiar with the area.

5.3.5. Buenos Aires

Which is the main point of strength of the Buenos Aires area?
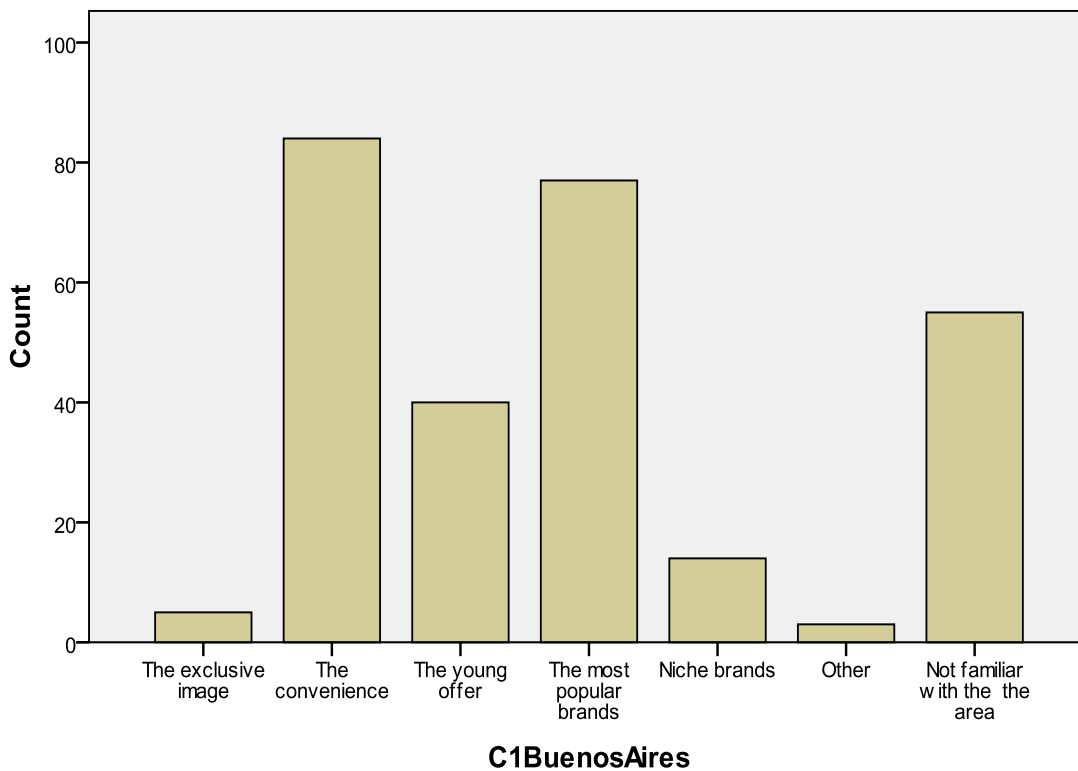
C1BuenosAires

The main points of strength of Corso Buenos Aires is **convenience (84)** followed by the **opportunity to find the most popular brands (77)**. Significant amount of students indicated the young offer as the main advantage of the area. The exclusive image and the opportunity to find niche brands were rarely indicated as the main characteristics of the area. There is a quite high unfamiliarity with the district, 55 students indicated they did not know the area.

5.3.6. Paolo Sarpi

Which is the main point of strength of the Paolo Sarpi area?
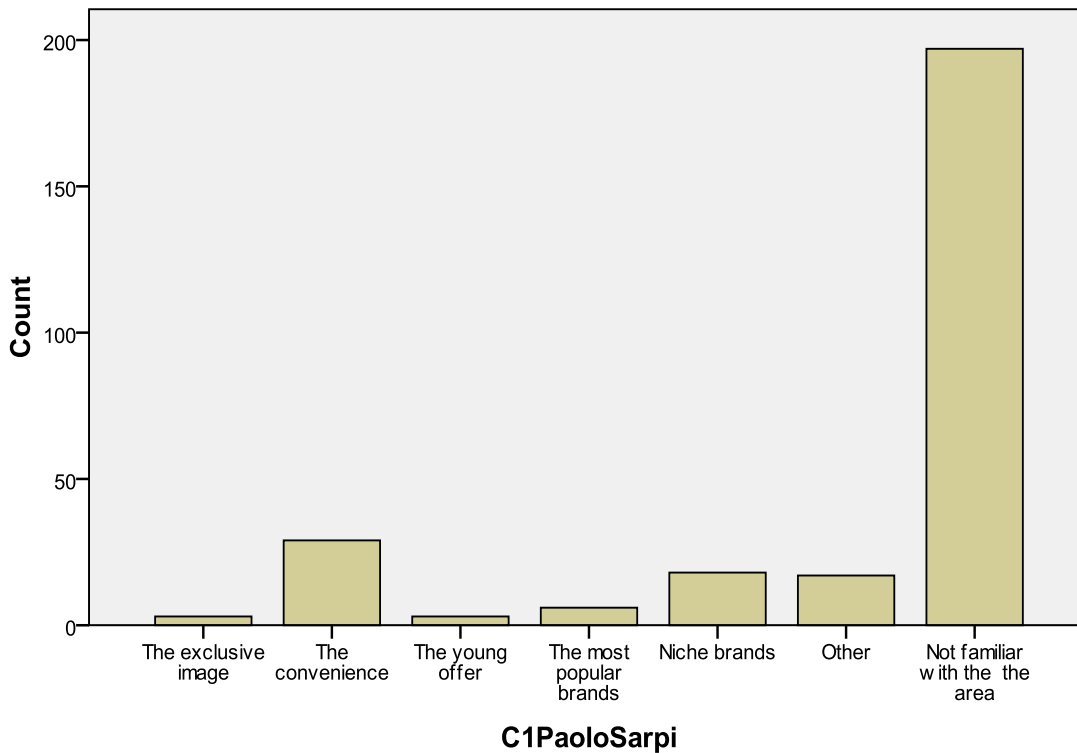
The area is characterized by a high unfamiliarity among international students **(197 answers),** therefore it is difficult to obtain significant results. Nevertheless, the most often indicated feature was the **convenience of the area (29 answers),** followed by the opportunity to find niche brands that nobody knows (17 answers). The features like the exclusive image (3 answers), the young offer (3 answers) or the opportunity to find the most popular brands (6 answers) were mentioned by few students which indicates its small relevance as the main points of strength of the area.

5.3.7. Isola

Which is the main point of strength of the Isola area?
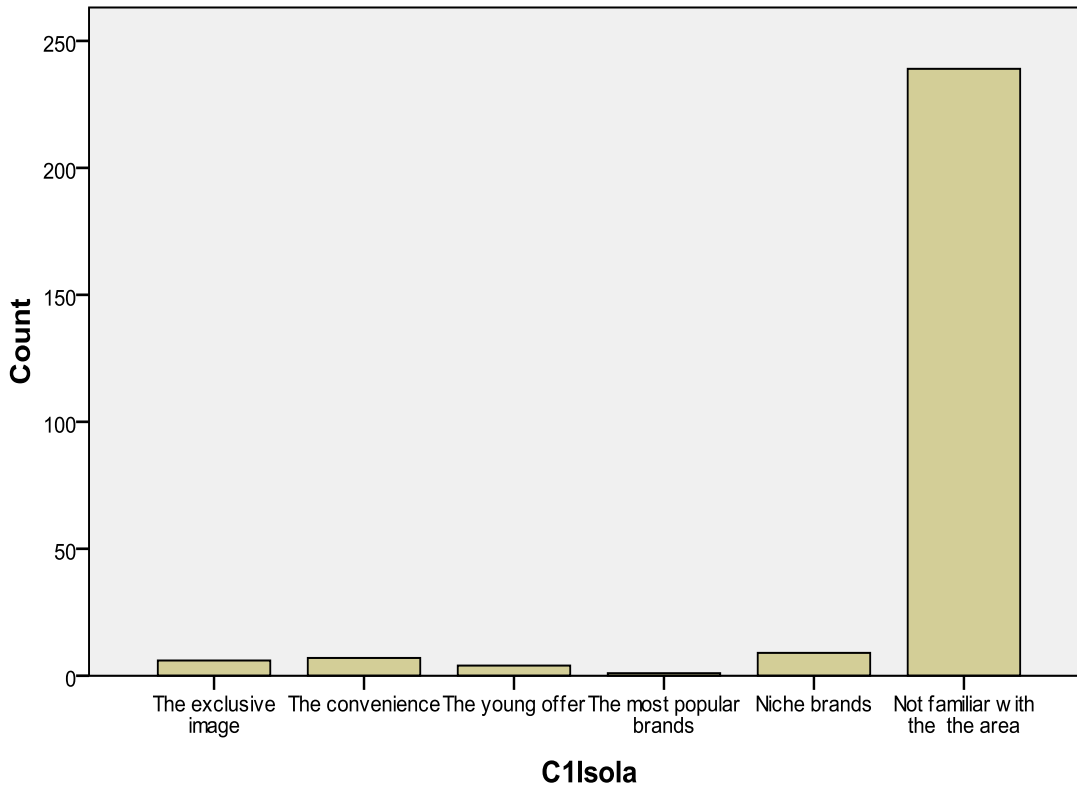
As in the case of Paolo Sarpi, the Isola area is characterized by a high unfamiliarity among international students, **239 students** indicated that they are not familiar with the area. Such a high unfamiliarity does not allow to obtain significant evaluation results. Among 266 answers, 9 respondents indicated the opportunity to find niche brands that nobody knows as the main point of strength of the area, 7 people indicated the convenience of the area as its main advantage, 6 people emphasized its exclusive image, 4 people indicated the young offer and just 1 the opportunity to find the most popular brands.

5.4. Qualitative description of the shopping areas

In order to verify the results obtained from the quantitative analysis of the answers given in 5.3., the purpose of following section is to present more qualitative evaluation of the fashion clusters. The analysis of the findings in 5.4 is based on the study of word clouds generated from answers given for open-ended questions. The students were asked to choose a word best describing a particular area. The answers are presented in the word clouds created in the free software Tag Crowd.

5.4.1. Duomo/ Vittorio Emanuele

The word cloud for Duomo/Vittorio Emanuele was generated from 271 responses, there were 83 different words mentioned. Among the most frequently indicated words were **touristic (38), luxury (21), convenient (17), exclusive (16) and crowded (14).** There is a significant variety of the adjectives mentioned to describe the area. On the one hand, there were answers describing the area as commercial, popular and accessible. On the other hand, there were answers related to the exclusivity and luxurious characteristics of the area. The variety of distinctive answers indicates that the area does not have a clear profile. The variety of the responses and the key words confirm the finding from the results of 5.3.1, the area is most often related to the

existence of popular brands, convenience and exclusivity. The area is the best known in comparison to the other shopping areas which explains why it obtained the highest response rate.

The findings form 5.3.1 and 5.4.1 are consistent with the description of the area in tourist guides and on the websites. The area attracts mass consumers but also those with a bigger purchasing power and desire for expensive, glamorous clothing designed by the most famous designers. Due to the central location the neighborhood is regarded as convenient. Moreover, the area is known not only for shopping but first of all, it is famous for sightseeing which explains its touristic profile.

5.4.2. Quadrilatero d' Oro (Fashion Quadrilateral)

The word cloud for Fashion Quadrilateral was generated from 152 responses and there were 50 different words mentioned. Among the most frequently mentioned words were **luxury (37), exclusive (16) and expensive (8)**. The variety of the words mentioned is low what indicates that the area has a clear profile- it is luxurious and exclusive. The findings are quite consistent with the results from 5.3.2 where the vast majority of students indicated the exclusive image of the area as its main characteristics. Moreover, the low response rate for 5.4.2 confirms that there is quite high unfamiliarity with the area. The only inconsistence with the previous findings is that in 5.3.2 the opportunity to find the most popular brands was indicated as one of the main points of strength of the area, whereas in 5.4.2 none of the students mentioned the word that would indicate that indeed there is a possibility of findings the most popular brands in the district.

The findings from 5.3.2 and 5.4.2 are consistent with the description of the area in the tourist guides and websites. The area has an exclusive image and targets the wealthiest and most sophisticated audience.

5.4.3. Brera

The word cloud for Brera was generated from 205 responses and there were 82 different words mentioned. The most frequently mentioned words were **artistic (19), nice (12), young (9), unique (8) and exclusive (8)**. The findings indicate that the area is diverse and has a unique, artistic profile. The findings are consistent with 5.3.3, where the most often mentioned characteristics were niche brands, exclusivity and the young profile.

The students' evaluation of the area is highly consistent with the description of the area in tourist guides and websites; Brera is an artistic hub, luxury bohemian where one can find many unique items.

5.4.4. Ticinese-Naivigli

The word cloud for Ticinese-Navigli was generated form 258 responses and there were 89 different words mentioned. The quantity of the replies and variety of the words mentioned confirms the wide offer of the area. The key words related to the area are: **young (64), trendy (22), alternative (12) and hip (13).** There a significant dominance of the word 'young 'which means that the area has a clear profile. The results are consistent with the findings from 5.3.4 were the young offer and opportunity to find niche brands were mentioned by the majority of the students. As mentioned above, the area is also quite popular among the interviewed students; many of them are familiar with the area and its offering.

The findings form 5.3.4 and 5.4.4 are quite consistent with the description of the area in the tourist guides, websites and online articles about the area. It is confirmed by such words as avant-garde, antique, original.

5.4.5. Buenos Aires

The word cloud for Coors Buenos Aires was generated from 208 responses and there were 86 different words mentioned. The most often indicated words were **convenient (19), commercial (14) and mass market (18)**. There was quite low variety of answers and the majority of given answers involve the adjectives of similar meaning like accessible, affordable and cheap. The results are consistent with the findings from 5.3.5., where the most of the students indicated the convenience of the area, possibility to find popular brands and the young offer.

The students' evaluation is consistent with the description of the area in tourist guides and websites. It is presented as cheap, dedicated to mass consumers who want to look stylish.

5.4.6. Paolo Sarpi

cheap (32) convenient (6) different (2) dirty (2) food (2) interesting (2) sketchy (2)

The word cloud for Paolo Sarpi was generated form 71 responses and there were 32 different words mentioned. The key word is **cheap** (32), followed by less frequently mentioned 'convenient'. The findings from the word tag are consistent with the results 5.3.6 where the area was evaluated as convenient.

The students' evaluation is not entirely consistent with the description of the area in tourist guides, websites and online articles. The area was not evaluated as lively or exciting. Moreover, the area is barely known, the most of the students are not familiar with the area, what explains the low response rate for 5.4.6.

5.4.7. Isola

nice (3) restaurants (2) upcoming (2)

The word cloud for Isola was generated from 16 answers and there were 12 different words mentioned. The key words are **nice (3), restaurants (2) and upcoming (2)**. The unfamiliarity with the area mentioned also in 5.3.7 explains the low response rate. As indicated in the word tag presented above just 3 out of 12 words were mentioned more then once. The remaining words were: underground, convenient, cheap, exclusive, developing, lunch, quiet, basic, design, romantic.

The findings from 5.3.7 and 5.4.7 are not significantly consistent with the description of the area in tourist guides, websites and articles about the area. The area is unknown and does not have a clear profile.

5.5. Milan versus other Fashion Capitals.

The purpose of the following question was to discover which cities are regarded as international fashion capitals and how Milan can be positioned among those cities. Although, according to the Global Language Monitor ranking (2009), Milan was nominated nr one - world fashion capital in 2009, for five previous years this status was acclaimed to New York. In 2009, Milan was followed by New York, Paris, Rome, London and Los Angeles. It might seem surprising that London, one of the 'big four' was surpasses by Rome which means that is the Italian 'eternal' city had more publicity in media during the year. Generally speaking, The Global Language Monitor is a company that analyzes the latest trends in using and choosing words as well as the effect of word usage on multiple cultural aspects. The ranking was based on GLM's Predictive Quantities Index, which is a proprietary algorithm that counts the words and phrases in online media, websites and blogs. The words are tracked accordingly to their occurrence and relative usage in global media outlets (The Global Language Monitor, 2010).

To check relevance of the results obtained by the Global Language Monitor media research as well as the established status of the 'big four' fashion cities, among international fashion students in Milan, we asked them to indicate 2 cities they considered Word Fashion Capitals and give a brief explanation of their choice. The ranking of indicated fashion cities is presented graphically to have a clear overview which cities were indicated the most often (only the cities that were mentioned more than 10 times are presented on the graph). Furthermore, for the top of the most commonly mentioned cities, the table was created basing on the main characteristics of these places and detail description given by students for each fashion capital of their choice (the table based on word clouds – Appendix 3).

5.5.1. Word Fashion Capitals

Which cities do you consider as main international capitals of fashion?
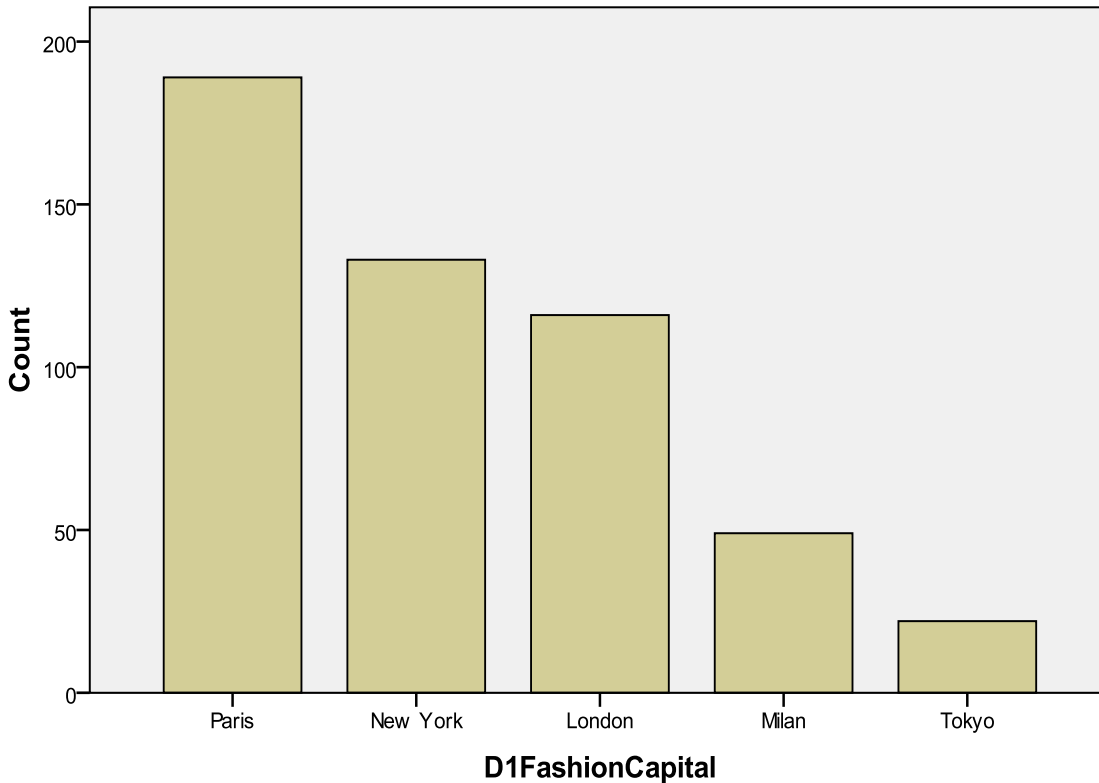
The status of being a world fashion capital was most often ascribed to **Paris,** (189) students indicated this city as a Fashion Capital). Secondly, 133 students indicated **New York** as the international Fashion Capital, situating it on the second position in the ranking prepared accordingly to the answers obtained in the questionnaire. The third place was taken by **London,** which gathered 70 answers. **Milan** was indicated by 48 students, which situates it on the fourth place. Finally, the city that was mentioned by a quite significant amount of students was **Tokyo,** which gathered 22 answers.

The other cities sporadically mentioned in the questionnaires (less then 5 times) were Hong Kong, Berlin, Copenhagen, Los Angeles, Antwerp, Amsterdam, Barcelona, Dusseldorf, Madrid, Rome, Sao Paulo.

5.5.2. Main characteristics of the world Fashion Capitals

	Paris	New York	London	Milan	Tokyo
Dominating market segment/ stylistic identity	**Haute couture, exclusivity, luxury**	**none**	**Street fashion, bridge, diffusion**	***Prêt a porter*, classic style**	**Avant-garde**
Key Characteristics	**Haute Couture, History Paris Fashion Weeks, Brands, Tradition**	**Trend-setting New York Fashion Weeks, emerging designers, stores and shopping, Cosmopolitism, fashion schools, celebrities**	**Trend-setting, Designers, Innovation Variety Creativity**	**Brands, Milan Fashion Week, Trend-setting Quality of *Made in Italy***	**Trend setting, Innovation, experiment**

11: The characteristics of World Fashion Capitals by international students

According to the students each fashion capitals can be distinguished by different characteristics. Paris can be regarded as a Fashion Capital mainly due to the significance of *haute couture*, long history in fashion and the importance of the Paris Fashion Weeks. According to the students, fashion is a part of the French culture and tradition.

To compare with, the second ranked city, New York is the most often associated with trend setting, New York Fashion Weeks, emerging designers, variety of stores and shopping. Additionally, New York is regarded as a Fashion Capital due to the fashion events, fashion schools and the presence of celebrities. Importantly students indicated its accessibility, international, multicultural character which lowers the barriers to entry to the industry and give more opportunities for the new designers.

Similarly to New York, the third ranked city, London is famous for trend setting, famous designers, variety and innovation. What is distinctive about London is avant-garde and street fashion. Moreover, it is known for its young and creative profile. In fact, British designers are avant-garde creators characterized by eccentricity, transgression, experimentation, extreme expression of fashion, use of innovative models, research and experimentation. In brief, London is associated with setting new trends, being innovative in fashion, accessible, and generally is more casual/alternative in comparison to Paris which was evaluated as a city of high fashion.

Milan, mentioned on the fourth place was mainly considered a fashion capital due to the presence of famous fashion brands. Milanese has been often portrayed as a capital of ready-to-wear. Indeed, the words indicated by the students have the characteristics of the higher fashion segment, Milanese fashion is stylish, expensive, fashionable, and traditional. The other important factors that were mentioned by the Milan Fashion Weeks, trend setting and fashion events. Milan is also characterized by the reputation of Made in Italy, the quality products and craftsmanship. In comparison to other described fashion capitals it does not have clear characteristics in case of industry segmentation, however it can be inferred form the responses that Milanese fashion is more luxurious and exclusive than accessible or alternative.

Finally, Tokyo is mostly associated with trend-setting, innovation, and experiment. The Japanese fashion is characterized by high level of newness and exclusivity as well as radical shocking designers, like Rei Kawakubo, Yohji Yamamoto Junya Watanabe, Hissey Miyake who emphasize innovation, experimental fashion, and publicity in media.

To sum up, each of the cities most often mentioned by the students is a part of 'the big four' and the majority of them were the top ranked cities according to The Global Language Monitor. Interestingly, the Japanese capital ranked as 12 by media research, seems to be rapidly developing as a fashion city, as it was ranked high by the students. To compare with, Rome position as fourth in media research, was mentioned by only one student. Generally speaking, the perception of students does not differ significantly from the objective fashion capital canons presented in media, although Milan does not seem to be prevailing anymore. The reasons for the choices of the students are multiple, varying between particular cities given the peculiar characteristics of these places. Nevertheless, it can be inferred that the most common reasons for choosing a particular city is trend setting, being a host to the fashion weeks and home to world recognized fashion brands.

5.6. The reasons to come to study in Milan

The students were asked to give two reasons for making the decision to study in Milan. The answers given by the students were grouped into 7 categories: **Fashion, Italy, Education, Career, Travelling, Experience, Option.**

Fashion

Italy

Education

Career

Travelling:

Experience:

Option:

Summary

The most frequent reason to come to Milan is **fashion related (80 responses**) for e.**g.** being a Fashion or Design Capital, the presence of fashion industry, fashion networks etc. Secondly, the students indicated **educational purposes** (**42 responses)** in their choice to come to Milan, the most frequently indicated reasons were the reputation of fashion school or specialized masters program. Furthermore, the students are attracted by **living in Italy (35),** because they are passionate about its culture, lifestyle or language. The following reason is related to seeking **new experience (20**), changing environment and getting to know new approach to fashion and design. Some students indicated that they chose to study in Milan with regards to its **location (16 answers)**, opportunity to travel around Europe or within Italy, emphasizing good location of Milan and the city's proximity of respondents home country. Finally, there were few answers

related to **career opportunities (6 answers)** in Milan or to the **limited choice to go abroad (6 answers).**

5.7. Mental associations with Milan

The students were asked to choose 3 words that come to their minds when they think about Milan. There were 552 words indicated related to fashion, business, culture, design, fun, diversity and lifestyle. There were positive and negative adjectives used to describe the students mental associations with the city. The variety of words mentioned by the students is presented in the word cloud below.

active (3) artistic (2) beautiful (3) busy (8) caffes (2) chaotic (4) chic (4) chocolat (2) colorful (3) commercial (3) cool (4) cosmopolitan (3) crowded (2) cultural (4) dangerous (2) design (9) dirty (6) dynamic (4) economic (3) elegant (6) entertainig (4) exciting (4) exclusive (17) expensive (16) fashion (62) fashionable (29) finance (23) friendly (2) fun (8) glamourous (3) historic (2) industrial (3) infleuntial (12) innovative (6) interesting (2) international (8) italian (8) lively (8) luxurious (17) materialistic (3) modern (7) multi-faced (5) nice (2) party (2) passionate (2) posh (6) pretentious (2) pretty (2) quality (3) rich (4) shopping (8) slow (3) stylish (8) trendy (16) unfriendly (2) unique (2) upright (2) urban (4) vibrant (2) wealthy (2) young (4)

The word cloud was generated from 552 words, however a word had to be mentioned more then once to be presented in the world cloud. The word fashion itself as well as the **words connected with fashion were indicated the most often.** The key words are: fashion and fashionable, followed by finance, exclusive, luxurious, trendy and expensive. Other words linked to fashion or business like trendy or influential. Interestingly design was not really associated with the city. The city was rather described as busy, modern, dynamic and urban then artistic or

historic. **Overall the responses related to fashion consisted of 191 words which constitute 34% of responses.**

5.7. Cultural differences

The research was conducted among 6 fashion schools Bocconi University, SDA Bocconi, Catolic Univeristy, Milan Fashion Insitute, Politechnic of Milan and Domus Academy. As mentioned in the methodology part, different fashion schools or fashion courses attract different groups of students in terms of country of their origin or the city of their study (Figure 5). Interestingly, the results vary between schools/course mostly attended by students from different regions. The variety of results (only the schools/courses from which more then 20 students filled in the questionnaires were taken into consideration) given to close-ended questions are presented in the table below.

	Fashion Weeks	Artistic and cultural events linked to fashion open to the wider public	Fashion fairs	Fashion brands	Fashion stores and specialized shopping areas
Total	4.2246	3.6202	3.8153	4.1533	3.9781
Bocconi	4.2453	3.7006	3.9467	4.1961	4.1623
FIT	3.72	3.0455	2.6667	3.1905	3.15
Domus (Management in Fashion)	4.45	4.05	4.1905	4.3	4.2
Domus (Management in Fashion and Accessories Design)	4	3.9355	3.9032	4.3226	3.9355
MAFED	4.5926	3.3571	3.5926	4.4444	3,66

12**: The factors that influence the perception of Milan as a fashion capital by university/course**

In the table presented above it can be noticed that the average of responses from FIT of which 87% come from North America and 100% study in New York City amounts below the total average total for each of the factors (none of the factors reached 4), which means the students are rather neutral or even disagree with the fact that Milan can be perceived as a fashion capital due to indicated factors. The average of responses for all the factors is lower the total average for these factors.

On the other hand, the students from Domus Academy (especially attending Masters in Fashion Management) which are in majority from Asian countries, agree or strongly agree (the average above 4) with all the factors that influence the perception of Milan as a Fashion Capital (the average of responses for all factors are above the total average).

	Accessibility Fashion Weeks	Artistic and cultural events linked to fashion open to the wider public	Fashion fairs.	Fashion brands.	Fashion stores and specialized shopping areas
Total	4.2372	4.229	3.6483	3.3445	3.4699
Bocconi	4.3586	4.3237	3.6176	3.2249	3.2416
FIT	4.5	4.3636	4.0476	4	4.0476
Domus (Management in Fashion)	4.1053	3.9474	3.7368	3.6842	3.5882
Domus (Management in Fashion and Accessories Design)	3.9	3.9355	3.7742	3.9355	4
MAFED	3.9259	4.2963	3.88	3.3077	3.68

13: The areas in which Milan could improve in order to be considered a fashion capital by university/course

Although, the overall mean of responses shows that Milan can be considered a fashion capital due to the presence of the Fashion Weeks, the average of responses indicates that the city should also improve in this area in terms of the Fashion Weeks accessibility. The average given

by the students from FIT is the highest, which means that the students agree or strongly agree that it should improve in all of the areas. To compare with, the average given by the students from Domus Academy- Management in Fashion is lower which indicates that they think that Milan does not need that much improvement in indicated areas.

	Big internationally fashion brands	All stores and products with original and local concept	The service offered in terms of stores opening hours is good	.The service offered in terms of sales assistance is good
Total	4.219	3.5746	2.8199	3.0582
Bocconi	4.3677	3.6867	3.1548	3.2452
FIT	3.5714	2.381	1.8571	2.6667
Domus (Management in Fashion)	4.35	3.75	2	2.2273
Domus (Management in Fashion and Accessories Design)	3.8065	3.871	2.8	2.9355
MAFED	4.1923	3.6	2.28	2.96

14: The evaluation of shopping experience by university/course

In terms of the first analyzed factor related to shopping experience, the total the average of the reposes where above 4 which means people agree that the are many renowned fashion brands in Milan, the average of responses of FIT was lower then the total average, whereas the average for Domus was higher then the total average. Similar distribution of responses was observed in relation to the stores with original and local concept. Furthermore, the overall evaluation of the service offered in terms of store opening hours is rather neural or even negative, the students from FIT evaluated it the most negatively. Interestingly, Domus students were even more dissatisfied with the service in terms of shopping assistance than the students attending FIT.

	Shopping Experience
Total	**3,77**
Bocconi	**3.978**
FIT	**2.6111**
Domus (Management in Fashion)	**3.35**
Domus (Management in Fashion and Accessories Design)	**3.5161**
MAFED	**3.4074**

15: Overall shopping experience by university/course

The overall shopping experience is rather good with a tendency to be neutral. The students from FIT were either negative or neutral whereas the students from Domus Academy were mostly neutral or positive.

Summary

According to the findings, the perception of Milan is influenced by the country of origin or the city of study. The research discovered that the people from North America, namely people studying at FIT in New York have a quite negative perception of Milan as a fashion capital, often emphasizing that Milan is not a fashion capital at all. All the branding channels were evaluated lower in comparison to the results coming from other schools. FIT students complained about shopping experience in Milan, store opening hours, lack of innovation, and poor variety of stores.

To compare with, the results coming from Domus Academy, especially Management in Fashion dominated by the Chinese students showed that the students form Asia have rather

positive perception of Milan as a city as well as a fashion capital. The students were amazed by the variety of shops offered. The adjective in which they described the city were often positive, (nice, stylish, beautiful). Most of these students, attended the universities in Shanghai, Taipei, Beijing. Although these cities are developing, they lack some characteristics possible to find in Milan.

It means that the country of origin, cultural background, and overall environment in which a person resides, develops to serve as a benchmark location that determines the perception of the city as a fashion capital. Having a very positive, renowned city as a point of reference, raises the expectations from the other city. New York is a developed, fast moving city with an established position in fashion and successful branding strategy, whereas Asian cities are still developing and can be distinguished from Milan. According to Asian's people, in Milan are more fashion-orientated, have more knowledge about fashion and put more attention to the way they dress (comparing with Shanghai and Beijing).

6. Conclusions

6.1. The identity and image of Milan as a fashion capital - the summary of the findings

Portraying a city as a World Fashion Capital is a challenging task. What is more, different targeted audiences might have distinctive image of the city. As a matter of fact, young people who come to Milan for educational purposes have a great capacity of shopping, spending money on cultural amenities and other various forms of entertainment. However, they have also their expectations and visions of what a city like Milan should offer.

The researched evaluated the relationship between brand identity and brand image reflected in the perception of Milan as a fashion capital among international audience who came to Milan for educational purposes. Overall, the research presents the broad picture of the various aspects of the fashion industry in Milan and the city's general profile as a fashion capital. In order to answer the research question, the research analyzed the identity and the perception of various branding channels, Milan Fashion Week, other promotional events and retail clusters. The particular emphasis is put on the analysis of the perception of fashion districts. Additionally, to have a deeper insight into multiple dimensions of the Milanese fashion industry, the overall shopping experience and mental associations with the city were evaluated. Furthermore, as Milan faces a great worldwide competition, the positioning Milan among other fashion capitals was measured. As a result, the research discovered that the image of Milan as a fashion capital among international students and its identity as such are not entirely coherent, especially given other fashion cities.

First of all, the research revealed that various branding channels have different levels of influence in shaping the desirable image, although there are not big differences in evaluation of the channels. According to the findings, Milan Fashion Week has the most persuasive power to shape the city's image as a fashion capital, but also is the one that needs the most improvement in terms of its accessibility. Moreover, Milan's valuable assets are internationally renowned fashion brands and shopping areas. Promotional events linked to fashion like fashion fairs and events are a little bit less effective in desirable branding Milan. It is surprising that the lowest evaluated

channel was related to cultural and artistic fashion events which are the most accessible for students given other promotional events.

The recognition of brands and retail clusters was reflected in a rather positive evaluation of the shopping areas. According to the students, in Milan all the big internationally fashion brands can be found, what was previously indicated as one of the most successful branding channels. Nevertheless, what Milan lacks are the stores and products with original and local concept. The service offered in terms of sales assistance is not of high quality, which indicates that Milan could improve in this area. Given the findings in this research, the weakest point of shopping in Milan are the store opening hours.

Generally, the retail districts were seemingly perceived in the articulate way they are branded in the tourist guides and on the website. Thus, the image of majority of the clusters is indeed coherent with the identity of the clusters. There are various shopping areas in the city, having distinctive characteristics in terms of market segmentation involving price ranges, target customers and offering. The most varied and the best known area in Milan, Duomo/Corso Vittorio Emanuele is a touristic and crowded place where one can find not only the most popular brands but also high end labels. The following research district, Fashion Quadrilateral is an area that has a clearly exclusive profile. The district is still quite unknown among international students, probably due to the focus on targeting wealthier groups of consumers. Luxury Quadrilatero d' Oro can be compared with chic Brera, an artistic and bohemian districts characterized by intimate character and young profile. Another district which has a 'young' profile, Ticinese-Navigli is attracting mainly young, alternative people, especially students. The area is not as expensive as the previously described districts and it is the one which was evaluated the most positively among international students. Alternative Ticinese can be contrasted with commercial Corso Buenos Aires. The district is convenient, affordable and commercialized, where one can find the most popular brands. The two remaining shopping districts Paolo Sarpi and Isola are not commonly known among international students. Paolo Sarpi is attractive due to its affordability and convenience. It is a good place to have a lunch and find the original things**.** Isola, located quite far form the city center, is undergoing some transformations, therefore the area was described as upcoming or developing. Nevertheless, it is the least known shopping district in Milan.

Although, in 2009 Milan was nominated the World Fashion Capital by the Global Language Monitor, it is not regarded as such by many international students. The cities like Paris, New York and London were indicated significantly more often then the Italian city. Paris garnered the highest rate of responses mainly due to its great history in fashion, dominance of *haute couture* and world famous designers and brands. The second ranked, New York was acknowledged mainly due to its trend setting, international, cosmopolitan profile and accessibility. Thirdly, there was London, famous for creativity, young spirit, innovation and street fashion. Milan, indicated on the fourth place was appreciated for the presence of famous fashion brands, ready-to-wear and quality of *Made in Italy.* Another city that gathered significant amount of responses was Tokyo's, whose style and flavor is characterized by high level of newness and innovation and experimental fashion, with a distinctive stylistic identity which cannot be find somewhere else.

Interestingly, although, Milan was not often indicated as a fashion capital, the reputation of Milan in fashion is the main driving force to come to study in this city. The reasons to come to study in Milan are various, starting form one available option to study abroad, through willingness to experience something new, challenges, passion for Italy to the passion for fashion. Nevertheless, many of the students emphasized that they came to Milan due to its reputation as a fashion capital or with regards to the opportunities offered by the fashion industry. What is more, fashion is not only the main driving force to come to the city but also a dominating mental association with Milan. The words most often associated with the city are related to fashion.

Remarkably, not all groups of students are of the same opinion when they think about Milan. The perception of the city is strongly dependent on the country or city of origin of the student. The real image of Milan in confronted with a benchmark city that determined the perception of the Italian city. Such benchmark cities were New York for FIT and mainly Taipei, Shanghai and Beijing for Domus students. The differences in perception of Milan by the students form various geographical backgrounds proved the importance of shaping the city's identity with regards to the global competition.

6.2. Exploiting the city's potential- policy recommendations

In light of the findings of this research, it can be established that the perception of Milan as a fashion capital is not entirely coherent with its desirable image. Although the branding channels are evaluated quite positively, there is still a wide area for further improvements.

The following is the list of important policy recommendations based on the results of this research in relation to the analyzed branding channels.

6.2.1. Promotional events liked to fashion

Accessibility of the Fashion Weeks and promotion of the fashion events

The Fashion Week which is the most effective branding channel is also a crucial factor that gives a city the status of a fashion capital. In fact, Milano Moda is restricted to people having a strong position in the fashion business. Average people are unable to participate in parties and events organized in relation to the fashion world. This is a possible reason why many students indicated it should be more accessible. Therefore, the idea is to make Milan Fashion Week more reachable by organizing fashion festivals and parties open to various groups not directly involved in the fashion business. The city could improve if the number of cultural activities not only during the Fashion Week but the whole year.

Interestingly, according to the students the fashion events are the least successful branding channel and the one that needs the most improvement. These results might seem surprising as fashion events are normally open to the wider public, so international students are welcome to participate in such events. The potential reason for that is that they are not aware of their occurrence as it is not promoted broadly enough. Thus, the events should be properly advertised, especially among young people and non Italian speakers. The possible means of promotion could be posters, vouchers, university websites, the events could be also communicated in tourist guides. The events should be organized in the areas which are closely related to fashion (e.g. Piazza Duomo) rather then unknown remote areas. To spread the spirit of accessibility and equality, these festivals and parties could include the fashion school students' collections, international fashion contests and competitions.

6.2.2. Shopping and retail districts

Promotion of the unidentified fashion districts

The fashion stores in Milan are geographically concentrated according to the market segment. However, the awareness of the existence of particular fashion clusters varies accordingly to their location. The best known areas are located in the city center or in a close proximity to the universities. Although Via Torino and Corso Buenos Aires have the same offering, the former attracts much more shoppers due to its proximity to the Piazza Duomo- the heart of the city. The areas located further form the center, are barely known. Moreover, there is no such place that would be well known among tourists, where the visitors could find the information about how to find specific shopping spots.

Thus, the idea is to develop a comprehensive marketing campaign to promote various shopping districts in Milan. The information about shopping should be readily available, it can be realized through for example supply of small pamphlets at the universities, describing and mapping shopping zones. Additionally, the maps of the city could be distributed among visitors, characterizing Milan as a World Fashion Capital, spotting info points for tourists, with the identification of department stores, and fashion areas with the position of each shop. This would allow for easier navigation in the city and saving time spent of searching for the particular shops. Finally, the awareness of the emerging districts would increase if the transpiration system was better planned and the underground connection expanded to peripheral areas was enlarged (e.g. Paulo Sarpi, Isola).

Increase the diversity of stores

According to the participants in the survey, what Milan particularly lacks are the stores and products with original and local concepts. Although, there are stores with unique local items like Corso Como 10, with ensembles of original content, the price range of the products are high, discouraging various groups of customers to shop in these kind of concept stores. On a more broad level, the poor diversity of stores can constitute an obstacle in successful branding of Milan as a fashion capital. In fact, most of the people dress alike, either they make their purchases in the

luxury stores or they wear mass - market brands. Although there are some outlets around Milan offering products at discounted prices, it's hard to find contemporary products. Unlike New York, Milan lacks the opportunity to find luxury goods at low prices. This might be the reason why the majority of people prefer to shop in New York. Moreover, what Milan misses are the department stores (La Rinascenete is the only one), very popular in other Fashion Capitals (Galeries Lafayette, Printemps, Bon Marche in Paris, Harvey Nicholas, Selfridges, Harrods in London, Bloomingdales, Macy's Barney's in New York). Department stores make shopping more covenient because they offer many products of differrent brands at the same time. With every store in one location it is easier for customers to spend time finding the exact items they want. Many foreign department stores offer a unique shopping experience and allow customers to diversify their style and become more fashionable. The suggestion is to increase the number of department stores, outlets and discount stores in the city center which would increase accessiblity of fashion.

Customer friendly environment

Customer service is one of the most important aspects of fashion, however, according to the students, in Milan the sales assistance is not of a high quality. The possible reasons of that are reluctance to speak English and treating customers according to their appearance. Moreover, the stores are crowded, there are long queues to the fitting rooms and most often it is not possible to return the item. Moreover, the stores in Milan close quite early, there are limited shopping hours during the weekends and on Mondays.

Thus, the recommendation is to regulate the store opening hours and keep the stores open during a lunch break. Moreover, as weekend shopping is very popular for working people and students who are busy all week, the stores should be open longer also during the weekends. The suggestion is to make promotions, events and occasions to involve customers in fashion, such as stores open until midnight to attract people and press. Additionally, good customer service will increase the number of shoppers.

6.2.3. Milan versus other fashion capitals

Promoting innovation and new designers

Given the opinion on other fashion capitals, the city lacks innovation and modern approach to fashion. Milan is home to famous, traditional designers with long established reputation in the fashion business. This limits the opportunities for the young designers to emerge and make a career in the city. What is more, there are just few institutions supporting young innovative designers. Thus, there should be more public showcases for emerging designers, with the focus on young talented people. Other means to supporting young designers could be various scholarships, sponsorships, grants and competitions. Moreover, there should be more initiatives aiming to increase the level of innovation in the city like fashion incubators, laboratories for innovation, city university research centers.

Milan as an international city

Although Milan is the most international city in Italy, where foreigners consist almost 15 % of the population, the city was not often indicated as international or multicultural. The possible reason of that opinion is the fact that English, the most important international language, is not frequently spoken and there are not many cultural events offered in this language. That might indicate, that improving standards of English would give the city a more global appeal. Additionally, the presence of the city in movies or series would help to promote the city's fashion and style (e.g. Sex and the City and Gossip Girl promotion of New York as a fashion city).

6.3. How can Milan differentiate itself?

In a globalized world it has become more and more difficult for urban agglomerations to gain advantage over competition. The world is changing thus the cities must evolve and adapt to the new requirements and challenges of the new era. Given such a competitive environment it is crucial to differentiate itself by developing a unique selling proposition that will be distinctive for the urban brand. Most often the cities that can adapt to those changes succeed and those who lack distinction are often fated to fail.

The importance of fashion as a creative industry has been growing in recent years, when being chic and stylish is very sought-after. In the most of the world cities, fashion is an important industry, reflected not only in every area of people's life but also in a city's economy. Therefore, there is nothing unforeseen in the fact that the status of a fashion capital has become an important policy target. City boosters and planners attempt to implement branding strategies in order to enhance a city 'fashionable' reputation and contribute to the city's economical development. In order to do so, they utilize various branding channels, and attempt to shape brand identity into a more recognizable brand image.

As indicated in the findings, fashion cities have the established sources of competitive advantage and recognized identities. Paris has a long history in high fashion, whereas London's fashion is innovative and trend setting, New York's international and accessible and Tokyo's experimental and avant-garde.

Despite the fact that in Milan there are also prevailing characteristics, like existence of recognized brands, history in ready-to-wear and quality of made in Italy, it might be insufficient to brand the city as a World Fashion Capital. What is more, regardless of Milan's long tradition as a city of fashion, without a proper branding policy, there is a potential threat of losing its distinctive identity.

The way in which Milan can distinguish itself is by liking its tradition in fashion with ability to innovate. The city should take advantage of its 'past glory' but also find new challenging ways to present its wide offer and ever-evolving profile, especially with regards to the forthcoming EXPO 2015, where such values as innovation, research and creativity will play a

crucial role. By combining such dichotomous standards at the initial glance, the city can indicate its unique ability to adapt to changes and meet the young people's expectations without loosing its heritage in fashion. Moreover, by being more 'fashion forward' and 'inventive' the city might become a more attractive destination for international audience. Finally, combining the heritage in fashion with innovation, not only in terms of fabrics and technological solutions but also retail channels, training and accessibility, might be a solution to sustain its competitive advantage the city gained throughout last decades.

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Appendix 1 Questionnaire

Gender M/F	
Age	
Nationality	
City of residence / Country	
City where you study / Country (before coming to Milan)	
University name	
Degree	

1. Milan Fashion and Design Capital

1.1. Why do you believe Milan could be considered a <u>Fashion Capital</u>?

(insert an 'X' on the scale of 1 to 5 where 1= I strongly disagree, 5= I fully agree)

Items	1	2	3	4	5
Thanks to the presence of Fashion Weeks					
Thanks to the presence of many artistic and cultural events linked to fashion open to the <u>wider public</u>					
Thanks to the presence of internationally renowned fashion fairs					
Thanks to the presence of many internationally renowned fashion brands					
Thanks to the presence of many fashion stores and specialised shopping areas					

1.2. In which areas do you believe Milan should improve in order to be considered a <u>Fashion Capital</u>?

(insert an 'X' on the scale of 1 to 5 where 1= I strongly disagree, 5= I fully agree)

Items	1	2	3	4	5
In making the Fashion Weeks more accessible to people interested in the fashion industry					
In the presence of artistic and cultural events linked to fashion open to the <u>wider public</u>					
In the presence of internationally renowned fashion fairs					
In the presence of many internationally renowned fashion brands					
In the variety of fashion stores and specialised shopping areas					

2. Shopping experience in Milan

2.1 <u>Fashion stores</u> in Milan

(insert an 'X' on the scale of 1 to 5 where 1= I strongly disagree, 5= I fully agree)

Items	1	2	3	4	5
In Milan you can find all the big internationally renowned fashion brands					
In Milan you can find all stores and products with original and local concepts					
The service offered in terms of store opening hours is good					
The service offered in terms of sales assistance is good					

2.2 Evaluate from 1 (very negative) to 5 (very positive) the overall shopping experience in Milan

Item	1	2	3	4	5
Overall shopping experience					

3. Evaluation of shopping areas

3.1. Dome/Corso Vittorio Emanuele

Which is the main point of strength of the"**Dome – Corso Vittorio Emanuele**"area?

(insert an X close to the **main point** of strength – only 1)

The exclusive image	
The convenience	
The young offer	
The opportunity to find the most popular brands	
The opportunity to find niche brands that nobody knows	
Other…………………………………………………………	
I cannot say because I am not familiar with the area	

3.2. Quadrilatero d'oro (Luxury Quadrilateral)

Which is the main point of strength of the"Luxury Quadrilateral"area?

(insert an X close to the **main point** of strength – only 1)

The exclusive image	
The convenience	
The young offer	
The opportunity to find the most popular brands	
The opportunity to find niche brands that nobody knows	
Other………………………………………………………	
I cannot say because I am not familiar with the area	

3.3. Brera

Which is the main point of strength of the"**Brera**"area?

(insert an X close to the **main point** of strength – only 1)

The exclusive image	
The convenience	
The young offer	
The opportunity to find the most popular brands	
The opportunity to find niche brands that nobody knows	
Other……………………………………………………………	
I cannot say because I am not familiar with the area	

3.4. Ticinese-Navigli

Which is the main point of strength of the"**Ticinese-Navigli**"area?

(insert an X close to the **main point** of strength – only 1)

The exclusive image	
The convenience	
The young offer	
The opportunity to find the most popular brands	
The opportunity to find niche brands that nobody knows	
Other……………………………………………………………	
I cannot say because I am not familiar with the area	

3.5. Buenos Aires

Which is the main point of strength of the"**Buenos Aires**"area?

(insert an X close to the **main point** of strength – only 1)

The exclusive image	
The convenience	
The young offer	
The opportunity to find the most popular brands	
The opportunity to find niche brands that nobody knows	
Other……………………………………………………………	
I cannot say because I am not familiar with the area	

3.6. Paolo Sarpi (Chinatown)

Which is the main point of strength of the"**Paolo Sarpi**"area?

(insert an X close to the **main point** of strength – only 1)

The exclusive image	
The convenience	
The young offer	
The opportunity to find the most popular brands	
The opportunity to find niche brands that nobody knows	
Other……………………………………………………………	
I cannot say because I am not familiar with the area	

3.7. Isola

Which is the main point of strength of the"**Isola**"area?

(insert an X close to the **main point** of strength – only 1)

The exclusive image	
The convenience	
The young offer	
The opportunity to find the most popular brands	
The opportunity to find niche brands that nobody knows	
Other…………………………………………………………	
I cannot say because I am not familiar with the area	

3.8. Choose a word to describe the different shopping areas in Milan

(if you don't know the area mark with an X)

Duomo/Corso Vittorio Emanuele	
Quadrilatero d'oro	
Brera	
Ticinese-Navigli	
Buenos Aires	
Paolo Sarpi (Chinatown)	
Isola	

4. Fashion & Design Capitals

4.1 Which cities do you consider as main international capitals of fashion and design? Give a brief explanation of your choice (ie the presence of innovative events or exhibitions, they are trend setters etc etc...)

N.	Fashion Capital	Reasons
1		
2		

5. Associations with Milan

5.1 Why did you decide to study in Milan?

1. …………………………………………………………

2. …………………………………………………………

3. ………………………………………………………..

5.2 In light of your experience in Milan define the city with three adjectives in order of importance.

1. …………………………………………………..…

2. …………………………………………………

3. ………………………………………………..

Appendix 2 Fashion students in Milan

University/Institute	Total number of fashion students (a.a. 2009-2010)	Number of International Fashion Students (a.a.2009-2010)	% of International Fashion Students (to total nr of students)
SDA Bocconi	42	37	88%
Bocconi University	1.311	522	40%
Catholic University	93	13	14%
Domus Academy	69	32	46%
European School of Economics	130	80	62%
IED	1.001	417	42%
Fashion Insitute of Burgo	400	200	50%
Istituto Marangoni	1.141	684	60%
IULM	171	5	3%
NABA	332	93	28%
Milan Politechnic	546	86	16%
Total	5.236	2.169	41%

Appendix 3 The characteristics of the World Fashion Capitals by international students- word Clouds

Paris

New York

London

accessibility (3)　avant-garde (2)　brands (4)　city (2)　creativity (5)　designers (11)
everyone (2)　fashion-shows (2)　fashion (2)　fresh (2)　heritage (2)　hip (2)　ideas (4)　innovation (10)
international (2)　lifestyle (2)　luxury (2)　originality (3)　schools (2)　shopping (2)　stores (4)　street-fashion (5)
style (3)　top (2)　trend-setter (24)　variety (8)　young (5)

Milan

artistic (2)　city (2)　craftsmanship (3)　creativity (2)　famous (2)　fashion-
brands (14)　fashion-events (4)　fashion-fairs (3)　fashion (10)
history (2)　luxury (3)　made-in-italy (3)　milan-fashion-weeks (6)　style (3)
trend-setter (5)

Tokyo

experiment (3)　innovation (4)　trend-setter (4)

Appendix 4 List of figures