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The Emergence of Los Angeles as a Fashion Hub: A Comparative Spatial Analysis of the New York and Los Angeles Fashion Industries

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Abstract

The US fashion industry is a useful lens through which to view the transformation of the country's urban economic systems. Initially an industrial vanguard, fashion has evolved into a more design-oriented sector and a central part of the 'cognitive-cultural economy'. Fashion is also a clear demonstration of place-specific comparative advantage and specialisation, intensely linked to 'place in product'. The paper traces the fashion industry's evolution from 1986 to 2007, focusing on New York and Los Angeles. The composition of the industry in each locale demonstrates each city's comparative advantage and these advantages may be key determinants of their future fortunes. Using geographical information systems (GIS), fashion's current spatial form is studied. Within the industry's sub-sectors, spatial patterns and similar geographical clustering emerge. The industry may be facing somewhat of a reconfiguring of its economic geography; however, the fashion industry's spatial-structural patterns persist within each city. We also find that fashion, like high technology and Hollywood, tends to produce regional network agglomerations, strong headquarter cities and co-location of particular sectors. Our findings are consistent with the larger theoretical and empirical observations on the post-industrial landscape.

Introduction

The US fashion industry, a vanguard of the manufacturing economy, is a useful lens through which to view the transformation of the country's urban economic systems over

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the past 20 years. While its roots can be traced to a strong manufacturing base located in US urban cores, rather than becoming obsolete, the industry has evolved into a more design-oriented sector that has become a central part of what Scott (2008a, 2008b) calls the 'cognitive-cultural economy' and its accoutrements of new media, consumption spaces and 'buzz' (Currid and Williams, 2010a). Fashion is strongly aligned with the new 'creative' thrust of contemporary economic development practice and urban policy (Evans, 2009; Ponzini and Rossi, 2010; Pratt, 2009). The domestic manufacturing of fashion has given way to a highly semiotic production process that is synergistic with other cultural and consumption-oriented industries (Scott, 1996; Currid, 2007). The industry relies on media and prestigious design institutes churning out highly skilled labour as much as factories and economies of scale (Rantisi, 2002, 2004).

In this paper, we look at the evolution of fashion as a conventional manufacturing-based industry and its increasing role as a design industry that creates symbolic content in the contemporary 21st-century metropolis, a place marked by spaces of consumption, amenities and city branding (Zukin, 1998; Florida, 2002; Clark, 2004; Glaeser *et al.*, 2004, among others). Building on the work of Rantisi (2002, 2004), we study the industrial dynamics of New York City's fashion industry. We expand upon Rantisi's pioneering work by looking at the way in which the industry has evolved differently in Los Angeles and compare the spatial breakdown of the industry in these distinct locales. In order to unpack the ways in which the industry contributes in different ways, we break down the fashion industry into four parts—manufacturing, wholesale, supply and design—and trace these sectors over time. While we commence our analysis with a national and metro comparison, we then narrow our focus to the US fashion capitals: New York and Los Angeles. Using County Business Pattern data, we trace the evolution of the industry in each city from 1986 (which we use as a proxy for the decline of the urban manufacturing economy) to 2007. We analyse the industry's composition over time and consider each city's comparative advantage and how these advantages may be key determinants of their future fortunes. In the final part of our analysis, we conduct geographical information systems (GIS) analysis of the spatial attributes of the current composition of the fashion industry in each city. We find that spatial concentration is more evident in New York than Los Angeles due to both spatial form and the nature of the industry in each locale. However, we find that, within the industry's sub-sectors (design, wholesale, manufacturing and supply), spatial patterns and similar geographical clustering emerge. We observe that the industry may be facing somewhat of a reconfiguring of its economic geography; however, the fashion industry's spatial-structural patterns persist within each city. Our work informs the extant literature on the importance of cross-fertilisation and geographical proximity in post-industrial economic development. While previous work has documented the importance of these geographically embedded mechanisms, we hope our research illuminates the spatial configurations of the important social and economic processes that occur within industrial clusters. We also find that, like other innovation-driven industries (such as technology, finance), fashion exhibits strong winner-take-all markets, whereby New York and Los Angeles possess a disproportionate concentration of the sector. We conclude with a discussion of current policy and economic development measures targeting the fashion industry in each city and the impact of broader forces on the spatial patterns of the industry.

Theories and Concepts

The Rise of the Post-industrial City

The deindustrialisation of US urban centres is a story that has been told clearly and cogently

innumerable times, most seminally by Piore and Sable (1984). Market saturation, low-cost overseas manufacturing and relaxing of trade agreements enabled domestic producers and retailers to seek out much cheaper manufacturing elsewhere. The fashion industry was not impervious to this dramatic economic restructuring. Pre-1970 almost all of the US' apparel-supply chain was located domestically and 70 per cent in large metropolitan areas. One in 10 manufacturing jobs could be found in the apparel industry, with 70 per cent of these jobs being located in large, 500+ employee establishments (Doeringer and Crean, 2006). Since 1980, there has been an 81.5 per cent decline in US apparel manufacturing jobs alone. New York City, the US capital of the fashion industry, experienced almost identical losses (US Bureau of the Census, 1980–2008). Like other manufacturing industries, apparel increased product differentiation and simultaneously moved production offshore to Latin America, Mexico and the Caribbean. These locales were still close enough to deliver on time, but offered far cheaper labour. Today, the majority of US apparel manufacturing establishments have downsized to fewer than 20 workers (Doeringer and Crean, 2006). The fashion industry's manufacturing collapse mimicked the wider problems facing US industries.

Fashion has re-emerged in the cognitive cultural economy (Scott, 2000). While the industry still heavily relies on manufacturing, the design aspect of fashion has become a critical part of the symbolic and cultural capital of cities around the world: New York, Paris, London and increasingly Los Angeles (Molotch, 1996; Rantisi, 2004; Currid, 2007). Additionally, the industry has incorporated flexible specialisation (Piore and Sabel, 1984), whereby it relies on economies of scope and rapid production of new styles of clothing.

Fashion and the Creative City

Fashion's role in contemporary urban economic development revolves partially around the paradigm of cities as spaces of consumption (Zukin, 1995, 1998; Glaeser *et al.*, 2001) or what Clark (2004) calls the "city as an entertainment machine", whereby amenities and cultural capital are positioned to lure talented labour pools and the 'creative class' (Florida, 2002). This emphasis on cultural capital has the second-order effect of enabling places to create their own 'distinction' from other places in an increasingly homogenised economy (Markusen and Schrock, 2006). The physical and visual manifestation of such development efforts in this new creative urban agenda appears in

> boldly expressed slogans concerning the new role of culture and creativity in the physical and economic revitalisation of cities (Mommaas 2004, p. 507).

Cultural industries, whether they are defined as the artists moving into loft space or the establishment of a fashion district, have experienced 'semantic and symbolic expansion' within this new schema where they are thought to be agents of regeneration in the old urban core (Evans, 2009), along with being viable revenue and job generators in their own right (Currid, 2006; Pratt, 2009). The consumption-oriented development agenda has not been entirely supported; in fact, quite to the contrary. Some scholars have cast this *leitmotif* in a more cynical light, arguing that cities have forsaken their positions as vanguards of upward mobility to become playgrounds for the élite replete with hip neighbourhoods and music scenes, but absent of middle-class services and rife with class stratification (Kotkin, 2006; Peck, 2005).

The role of fashion in both economic and semiotic city development has played out specifically in two US cities: New York and Los Angeles. In her seminal analysis of the fashion industry, Rantisi (2004) found that, since the mid 20th century, US fashion has moved from being a second-tier, apparel manufacturing sector to a world-renowned design-oriented industry,

with its headquarters firmly rooted in New York City. The collapse of the manufacturing sector of the fashion industry forced the industry to downsize, consolidate and ultimately focus on in-house design. In other words, fashion became a design- and innovation-oriented industry in order to survive in the post-industrial economy. Certain historical events enabled this transition: the establishment of New York's semi-annual Fashion Week (tied to the Milan, Paris and London Fashion Weeks), the rise in importance of American *Vogue* and *Women's Wear Daily* and the establishment of prestigious design schools (Pratt, Parsons and the Fashion Institute of Technology) solidified the city's significance around the world as a serious player (Rantisi, 2004). The city's dominant position and the US fashion industry's more recent emphasis on design-oriented production continue to increase in importance over time. Today, New York City is almost 16 times more concentrated in fashion designers than any other US metro. Los Angeles is second, with five times more designers than other metros (Currid, 2006). Nine of the Fortune 1000 companies are fashion industry firms located in New York City. Together, they bring in a combined annual revenue of US$31 billion (Forbes, 2009). The city's semi-annual Fashion Week alone generates a totally annual economic impact of $733 million (NYEDC, 2009).

While New York remains the country's centre of design, Los Angeles has sought to create an advantage in high-end casual sportswear, even establishing its own Fashion Week and developing a downtown Fashion District. In addition to the more conventional importance of the fashion industry as an important source of city revenue and jobs, both Los Angeles and New York have benefited from the branding that fashion provides their cities and symbiotically the branding these cities provide designers (for example, C&C California, 'made in New York' or Andrew Marc New York).

Fashion mimics the attributes strongly associated with the post-industrial economy: it relies intensely on knowledge, perpetual innovation and close proximity (Rantisi, 2002; Currid, 2007). The industry also overconcentrates in particular headquarters (New York, Milan, Paris, London and increasingly Los Angeles) that are strongly connected to one another, reflecting a global city network of the cultural industries (Sassen, 2001; Currid-Halkett and Ravid, 2010). The process of 'getting things done' occurs in these discrete cities with subsequent distribution of production and products world-wide. As Kawamura (2005) points out, fashion is a 'collective' process whereby many different people and institutions are necessary to its productions, including 'critical intermediaries' (Zukin and Maguire, 2004), such as fashion magazines and editors, alongside the designers.

Yet fashion departs from other examples of innovation-driven industries because it produces tangible products alongside its information and semiotic content. In this respect, particularly in Los Angeles, fashion operates in a dual role in the 21st-century urban economy. Fashion relies on just-in-time materials for preliminary designs, product samples and limited batches of high-end apparel that are not produced offshore. Thus, New York's Garment District and Los Angeles' Fashion Districts play important roles not just in facilitating the concentration of designers but also by providing the materials and supplies necessary for the innovation and preliminary production processes (Rantisi, 2002; Currid, 2007). In this respect, the fashion industry operates within a traditional manufacturing agglomeration, retaining clustering qualities similar to Marshall's (1890/1920) 'industrial district' and relying on what Scott (1996, p. 308) calls a 'durable workforce'. Simultaneously, the designers also produce the intangible buzz and cultural milieu that has become so important to contemporary economic development (Currid and Williams, 2010a). We look at how these facets within the industry play out in Los Angeles and New York, unpacking both their sector and spatial

composition and considering how the distributions within the industry might explain each city's distinctive role as a fashion centre.

Methods

In order to compare and contrast the fashion sectors in New York and Los Angeles over time, we used the US Census County Business Patterns (CBP) data from 1986 to 2007. The data provide an annual detailed geographical and industry snapshot for US business establishments (US Bureau of the Census, 1980–2008). The data are particularly suitable for time-series comparisons across different geographies as the methods for data collection are the same over time and across geographical locations. For the purposes of this data analysis, we used establishments; while the County Business Patterns data do have employment size figures, the data have been inconsistently reported over the years and, in some years, the numbers were missing for particular fashion industry sectors. On the years employee size was reported, the averages were comparable in scale to the establishment data. Therefore, establishments were used for the analysis in order to remain consistent over the time-frame of the study.

The County Business Patterns data break down each industry into NAICS codes (North American Industry Classification System)—for example, apparel manufacturing is NAICS code 315. To analyse the different sectors of the fashion industry we identified the NAICS codes associated with each sector. New York City's Economic Development Corporation (NYEDC) separates the industry into design, wholesale, retail and supply sectors and this research uses the same NAICS codes identified by the NYCEDC in order to make our research comparable with New York City's definition of the industry. (See Appendix 1 for NAICS code specifications.) Using the same codes as NYCEDC also provides an accepted standard to work with and a way to incorporate and compare our finding with New York City's research. Previous to the NAICS coding system (NAICS started in 1997), County Business Patterns data used the Standard Industrial Classification System (SIC) coding system. Crosswalks were developed for each year the NAICS and SIC codes changed (2007, 2002, 1997, 1987, 1977).[1]

The fashion industry was broken down into four sectors: supply (textile miles, piece goods), wholesale, manufacturing (apparel, leather, costume jewellery) and design (see Figure 1). (Please see Appendix 1 for the complete listing of SIC/NAICS codes used.)[2]

Once the NAICS and SICS codes were identified, it was possible to parse out the County Business Patterns data by sector and geography for each year of interest (1986–2007). The study started by performing a comparison of the fashion industry as a whole for each metropolitan statistical area (MSA) in the US. The New York and Los Angeles MSAs had larger portions of this industry than any other MSA. The fashion industry was then broken down by sector—design, wholesale, manufacturing and supply for Los Angeles and New York—in order to compare and contrast the strength of the industry in each city and the US as a whole.

It has been established that the design sector was highly clustered in New York and Los Angeles (Currid and Williams, 2010b), but questions persist with regard to the extent to which the other sectors within fashion converge spatially. To understand the current spatial distribution of the industry in each city, a GIS-based zip-code-level industry analysis was performed for each fashion sector in each MSA, using the latest County Business Patterns (CBP) data (2007). Zip-code-level CBP data were downloaded and parsed by industry sector and then joined to GIS files representing all the zip codes in each of the MSAs. The firm density (establishment numbers/area) of each fashion sector was then analysed and visualisations were developed to identify those neighbourhoods in each city where the density of establishments existed at higher standard

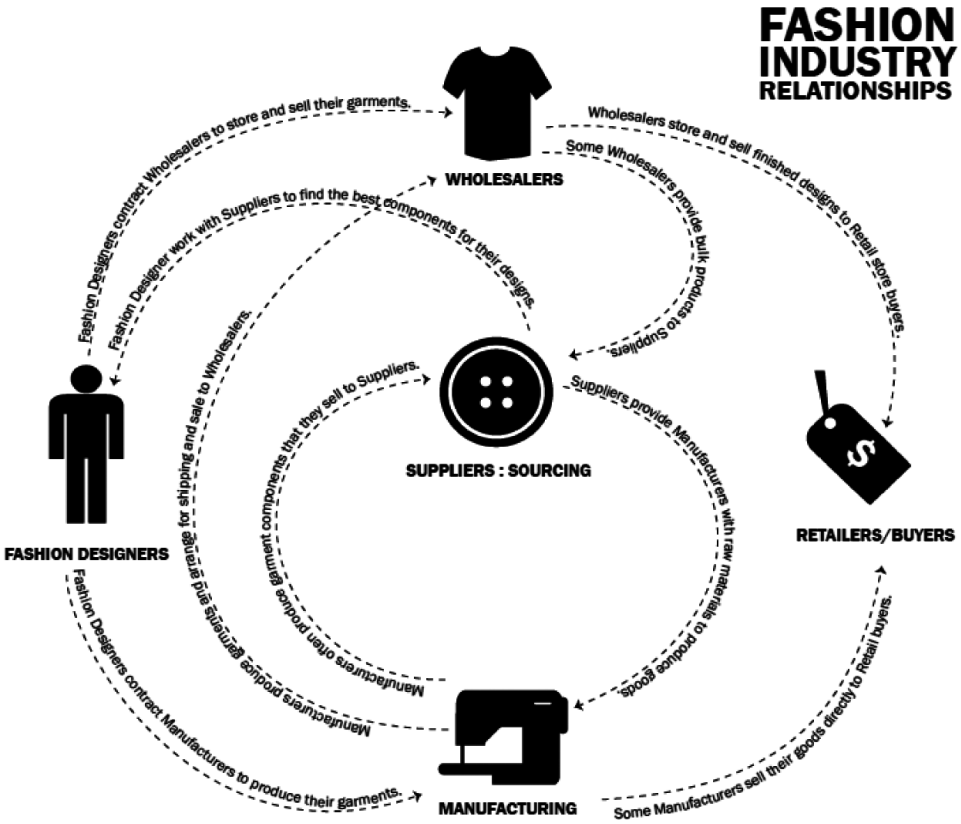

Figure 1. Fashion industry relationships.

deviations away from the mean density of establishments for that sector. The results clearly showed areas within each MSA that have higher than average numbers of establishments in each fashion sector. In both cities, the spatial distribution of establishments was closely tied to the metro area's fashion district.

In order to test the spatial clustering tendencies seen in the fashion-sector density maps, spatial statistics were used on the zip-code-level CBP data in New York City and Los Angeles. The global Moran's I statistic was employed using different distance bands to determine the regional clustering patterns (Tables 1 and 2). We used the global Moran's I statistical tests to determine whether spatial autocorrelation (clustering) occurs based on feature locations and attributes. The result explains the level of clustering, dispersion or random nature of the data. The results illustrated that the clustering occurred for all fashion industry sub-sectors (supply, manufacturing, wholesale and design) (see Tables 1 and 2 for results). We then employed the Getis–Ord, G*i or 'hot-spot' statistic to look at the localised clustering patterns in each city. The Getis–Ord or G*i statistic is used to determine 'hot-spots' or areas that have values higher than you might expect to find by random chance; it outputs a z-score which represents the significance of clustering at a specified distance. Areas identified as hot-spots using this z-score not only have values that are significantly high, but also values that

are significantly higher than those in the areas surrounding them. The 'hot spots' analysis showed that, overall, the fashion industry subsectors in both cities clustered around each city's fashion district. At the same time, both cities appeared to have secondary clusters for fashion design and manufacturing.

Results

Distribution of the Fashion Industry among and within Cities

We looked at these four sectors of the industry on the national level over time and found that the industry concentrates in two discrete locations: New York and Los Angeles. The national share of the industry has decreased in other metropolitan areas. This shift seems to follow a trend in the specialisation of the industry into niche markets, as well as the bi-coastal advantage of these two cities. Next, we discuss these findings in more detail.

Overall, wholesale is the largest component of the fashion industry, capturing 48 per cent of all establishments related to fashion (see Figure 2). While manufacturing has declined in the US, it remains an important part of fashion, contributing almost a quarter of the industry, the same share as supply establishments. While fashion is increasingly thought of as an innovation-oriented industry, design establishments are only 4 per cent of the national share of the industry and they are overwhelmingly concentrated in New York City, reflecting the command-and-control nature of the industry (Sassen, 2001).

After we looked at the national distribution of the fashion industry across the four identified sectors, we looked at the 2007 national share of each component across US metros. In all four sectors, New York City and Los Angeles capture a disproportionate share of the industry. In 2007, New York captures 30 per cent of the national share of wholesale, 14 per cent of supply, 17 per cent of manufacturing and 27.5 per cent of design establishments. Los Angeles captures 16.4 per cent of wholesale, 11 per cent of supply, 32.4 per cent of manufacturing and almost 14 per cent of the national share of design. No other metro possesses anywhere near as much of the national share in any of these sectors. For example, in 2007, Miami is ranked third in wholesale and manufacturing and captures just 4.7 per cent and 2 per cent of the national share respectively. Miami, Chicago and San Francisco are ranked third, fourth and fifth in design and possess just 5 per cent, 4.4 per cent and 2 per cent of this sector respectively (see Figure 3). Chicago is fourth in wholesale and captures less than 3 per cent of the national share in the sector. San Francisco is ranked fourth in apparel manufacturing and yet captures just 2 per cent of national share (see Appendix 1 for detailed tables.)

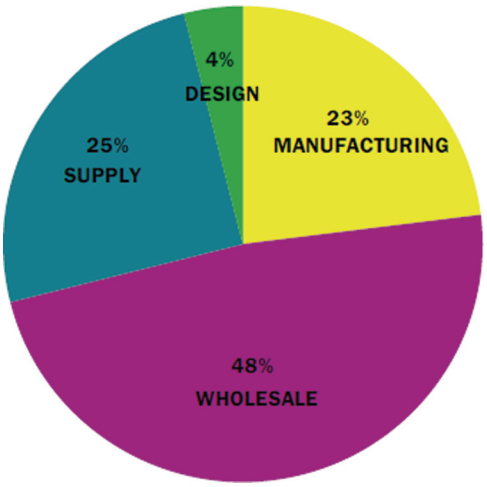

Figure 2. The composition of the fashion industry establishments in the US, 2007.
Source: US Bureau of the Census (2007).

Our comparison of US metros demonstrates that Los Angeles and New York are dominant across all facets of the fashion industry. While it has long been established that New York is the epicentre of fashion design (Rantisi, 2004) and that Los Angeles has held a comfortable second place position (Currid, 2006), our analysis demonstrates that these cities not only act as

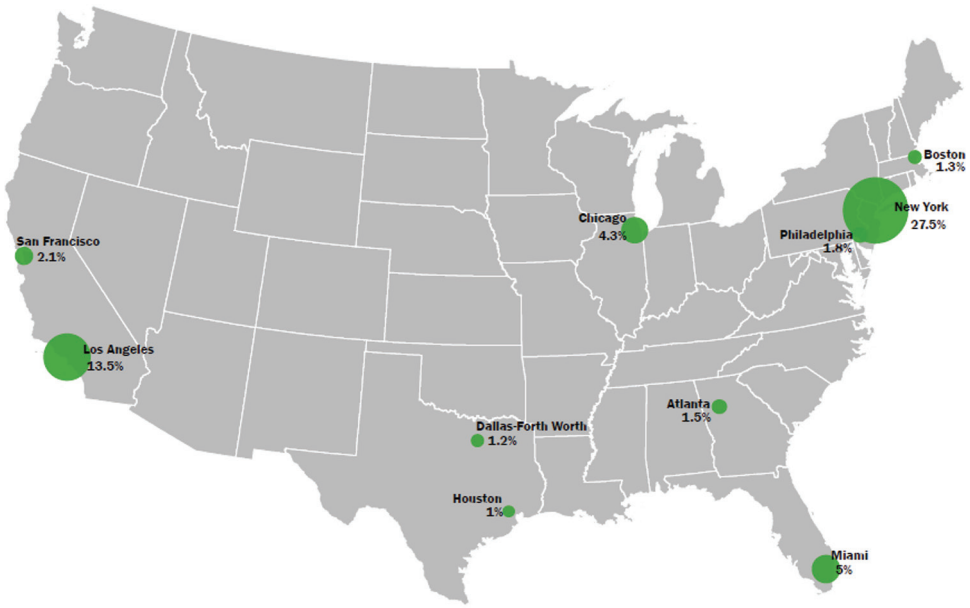

Figure 3. The distribution of the national share of fashion design establishments in the US, 2007.

Source: US Bureau of the Census (2007).

innovation centres for the industry, but also operate as important centres of production and trade as well. We speculate that these concentrations are linked to the need for fashion to have just-in-time materials and production for samples and high-end design collections.

After establishing these two cities' central positions in the industry, we sought to determine the comparative advantage each city has in particular sectors within the industry. The current composition of the industry in both cities reflects the overall reputation each city has cultivated within the broader fashion industry. Each demonstrates considerable unique strengths. New York has a strong advantage in design; this sector represents 5 per cent of the city's overall fashion industry, 1 per cent higher than national distribution and 2 per cent higher than Los Angeles (see Figure 4). At 15 per cent, New York is significantly less represented in supply than national composition (25 per cent) in the sector but on a par with Los Angeles (15 per cent) by this measure (see Figure 5). Besides design, New York's real distinction is that it is more comprised of wholesale than both the US and Los Angeles: 63 per cent of New York's fashion industry is represented by wholesale (versus 48 per cent for the US and 43 per cent for Los Angeles). Los Angeles' comparative advantage is in manufacturing: at 39 per cent, manufacturing is the leading sector within the city's fashion industry. Apparel manufacturing is notably more dominant in Los Angeles than in New York and in the US. The share of this sector in Los Angeles' and New York's overall composition is 23 per cent and 17 per cent respectively.

The Longer View

In the next stage of our research, we looked at the trajectory of the industry over time in New York, Los Angeles and the US. We commenced our analysis with 1986, the earliest data we could attain at the four-digit SIC level. This year is also approximately around the end of the major deindustrialisation of US cities, thus enabling us to study fashion from the nascent

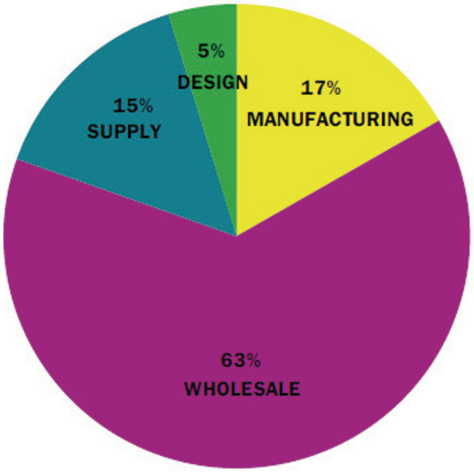

Figure 4. New York City: the composition of the fashion industry, 2007.

Source: US Bureau of the Census (2007).

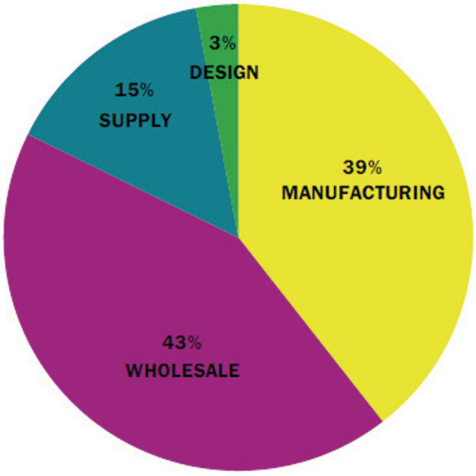

Figure 5. Los Angeles: the composition of the fashion industry, 2007.

Source: US Bureau of the Census (2007).

years of the post-industrial economy to the present day. Our time-series analysis tells an underlying story which highlights the rapidly changing direction of the industry. We draw two results from our findings. First, while New York remains the US fashion capital, the data demonstrate that Los Angeles is developing a notable fashion industry and emerging as an important alternative US-based centre outside New York City. Secondly, across all sectors within the industry, Los Angeles has increased its number of establishments. However, Los Angeles' emergence is not usurping New York City's advantages. New York has gained in national share and establishments within the design and wholesale facets of the fashion industry.[3] Instead of taking over New York's position, our analysis suggests that Los Angeles is increasing its share in two sectors of the US economy that are conventionally considered in decline: supply and manufacturing.

New York's advancement in design and wholesale sectors reflects overall national trends. From 1986 to 2007, the US has experienced an increase in its number of wholesale establishments by 46 per cent and has doubled in size in design establishments during the same time-period. Conversely, since 1986, the US has declined by 40 per cent in apparel manufacturing and 20 per cent in the fashion and apparel supply sector. New York's establishment data reflect similar trends (see Figure 7 and Appendix 1). However, New York remains the design headquarters, capturing 27 per cent of national share in this sector.

Los Angeles has a distinctly different story to tell. In the past 20 years, Los Angeles has developed a substantive fashion industry where previously it did not exist. It has dramatically increased both its national share and absolute number of establishments in all sectors within the fashion industry. In one respect, these results are unsurprising: given the initial lack of a fashion sector, the city had nowhere to go but to increase its position. Remarkably, however, Los Angeles' increased position in the domestic fashion industry is in sectors within the fashion industry that have witnessed a decline in New York and the US overall. Additionally, Los Angeles has established a small but important cultural niche in casual sportswear. Since 1986, Los

Angeles has increased its number of manufacturing establishments by 62 per cent and almost tripled its number of wholesale establishments (from 1563 to 4203). Similarly, it has increased its supply sector by 50 per cent (from 987 to 1450 establishments). While Los Angeles has not expanded its design sector on a par with New York in absolute numbers, the city has increased its national share by 5.4 per cent from 1998 to 2007 (see Figure 6). (We commence with 1998 instead of 1986 because the SIC codes prior to this year do not accurately capture fashion design establishments. There is no way to distinguish fashion design establishments using SIC codes. Please see note 1 for greater detail.) Los Angeles' national share in these industries has also increased dramatically (see Figures 7 and 8). Perhaps the most notable finding is that, while the rest of the US has witnessed dramatic declines in apparel manufacturing, Los Angeles has not only increased its national share but has dramatically increased in absolute numbers as well (see Figures 7 and 8). We speculate that this result may be partially explained by Los Angeles' cheap immigrant

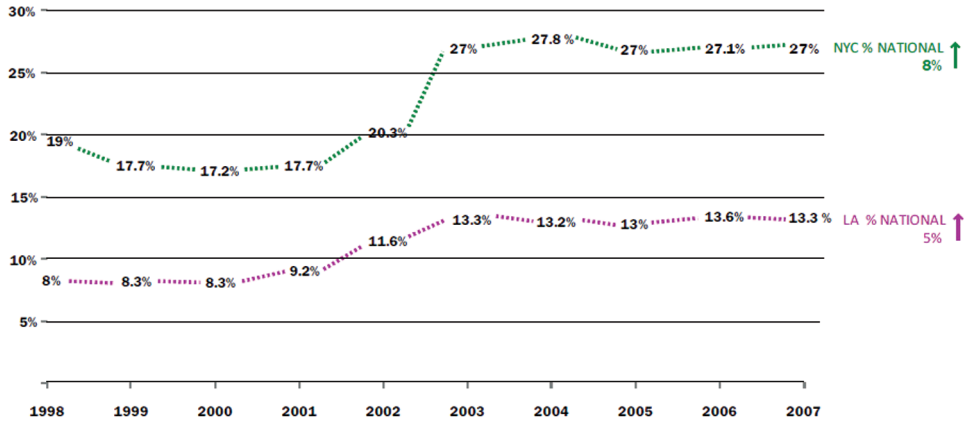

Figure 6. New York and Los Angeles: share of national fashion design establishments, 1998–2007.

Source: US Bureau of the Census (1998–2007).

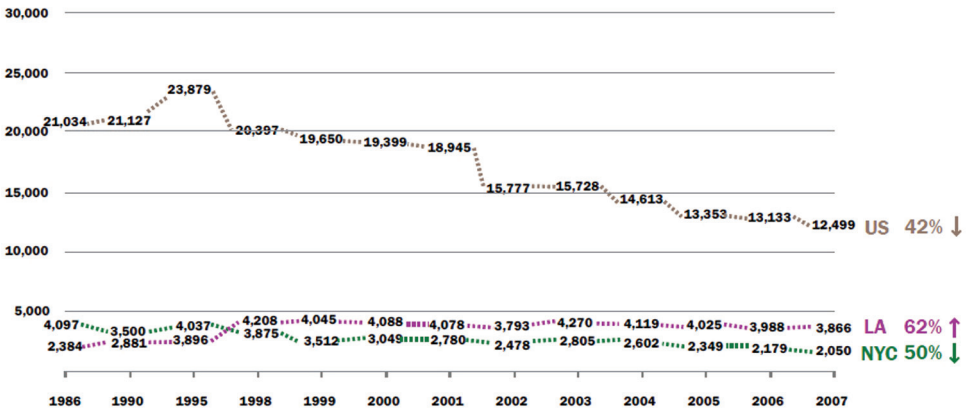

Figure 7. Apparel manufacturing establishments, 1986–2007.

Source: US Bureau of the Census (1986–2007).

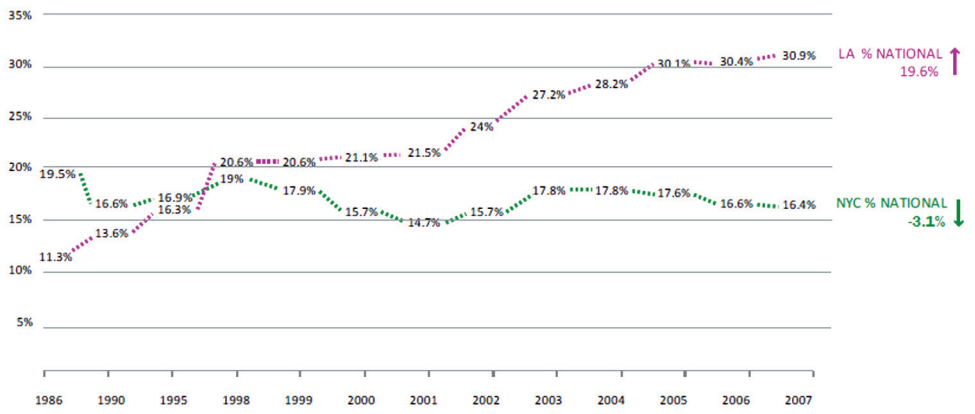

Figure 8. National share of apparel manufacturing establishments.
Source: US Bureau of the Census (1986–2007).

labour that works in apparel manufacturing establishments (Waldinger, 1999).

While Los Angeles may have demonstrated increases due to its lack of a previous concentration of the industry, its rate of increase is still notably more than other US cities. In absolute numbers, New York still leads in wholesale, design and supply (Los Angeles surpassed New York in manufacturing in 1998). Los Angeles, however, has established itself as a rapidly growing centre within particular aspects of the industry. While these figures might indicate that Los Angeles could surpass New York over time, the results must be viewed circumspectly. Despite Los Angeles' inroads, New York remains significantly more dominant in design and thus the 'place in product' (Molotch, 2002) aspect of fashion will remain branded by New York for the foreseeable future.

The Economic Geography of the Fashion Industry

New York and Los Angeles have established a bi-coastal national concentration of the fashion industry, as each is able to cultivate a unique position in the industry. At the same time, these two cities have remarkably different spatial forms, thus suggesting the industry would organise itself differently in the two cities. Los Angeles is one of the most sprawling urban areas in the US, while New York City is one of the densest (Currid and Williams, 2010b). A comparison of the spatial distribution of fashion production establishments in each city allows us to understand how space plays a role in the way the industry organises itself and may indicate whether close proximity is important to fashion's industrial and innovative activities. To get at this line of inquiry, spatial statistics were employed to analyse fashion industry spatial trends; the results showed similarities in the spatial distribution of the industry in both cities. Broadly speaking, these findings demonstrate that location is an important component of how the fashion production chain operates. Place and proximity appear to matter for the production and distribution of fashion industry products, but this need varies across the sub-sectors.

Looking at the spatial distribution of all the fashion industry sub-sector establishment densities indicates that each city has an important localised industrial hub. In each case, this hub is centred within each

city's fashion district. In New York City, this neighbourhood is the Garment District: demarcated as the area between 5th and 9th Avenues and 34th to 42nd Streets. Seventy-nine per cent of New York City's fashion industry establishments (all sectors) have their centres within this neighbourhood (see Figure 9). There are a few other locations of concentration within the MSA: Long Island City in Queens, Sunset Park in Brooklyn and lower Manhattan. However, these neighbourhoods hold a much smaller number of establishments when compared with the Garment District in midtown Manhattan.

Los Angeles also exhibits a core location for the fashion industry in its Fashion District;

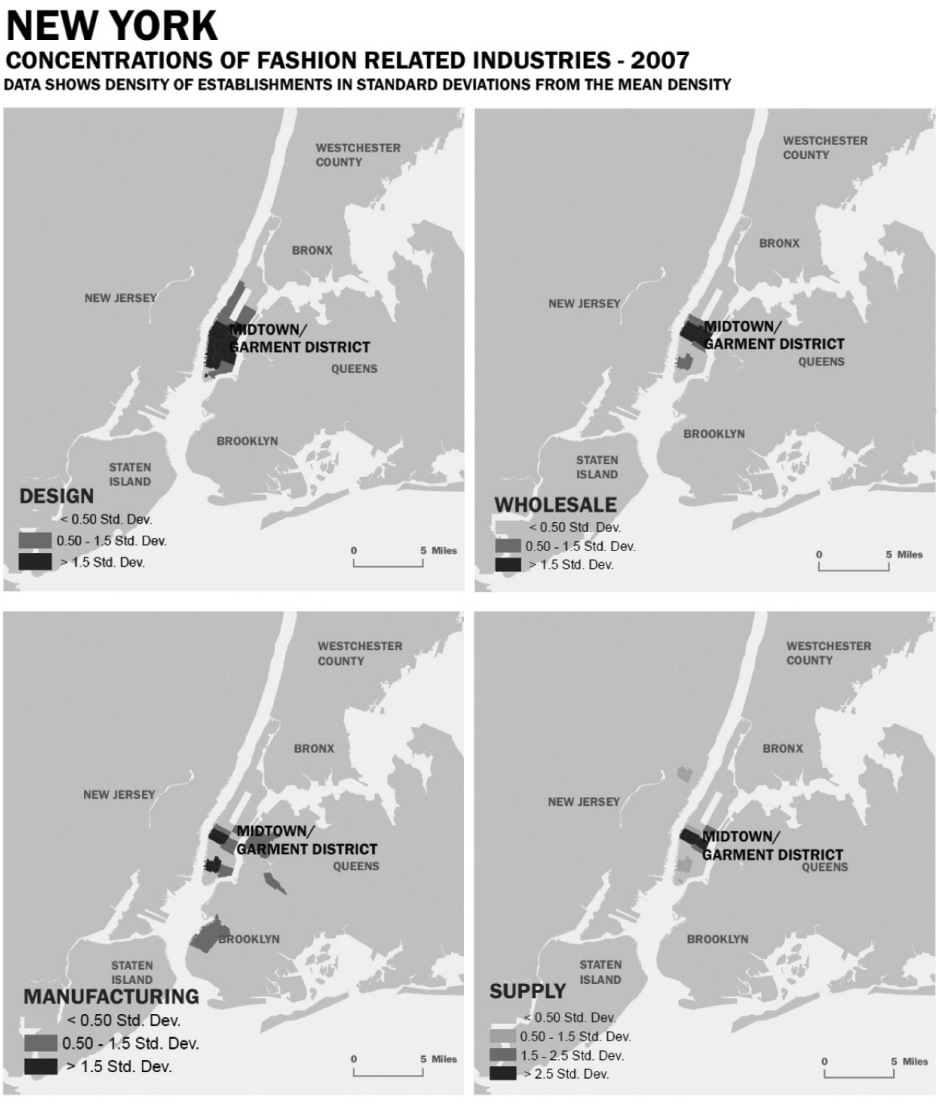

Figure 9. New York City: the density of fashion-related industries—represented as standard deviations from the mean.

however, the concentration is considerably less than that of New York. Los Angeles' downtown core (and Fashion District) holds only 32 per cent of the industry's activity within the larger MSA. Manufacturing, wholesale and supply remain primarily downtown and in the nearby outskirts south of Los Angeles. While the downtown core is home to all aspects of the industry (manufacturing, supply, design and wholesale all have a presence), other neighbourhoods within the city are important to fashion (see Figure 10).

We speculate that Los Angeles' more dispersed fashion industry can be at least partially explained by its larger, more sprawling geography. There is simply more space to establish the industry in a number of locales throughout the city. Additionally, Los Angeles

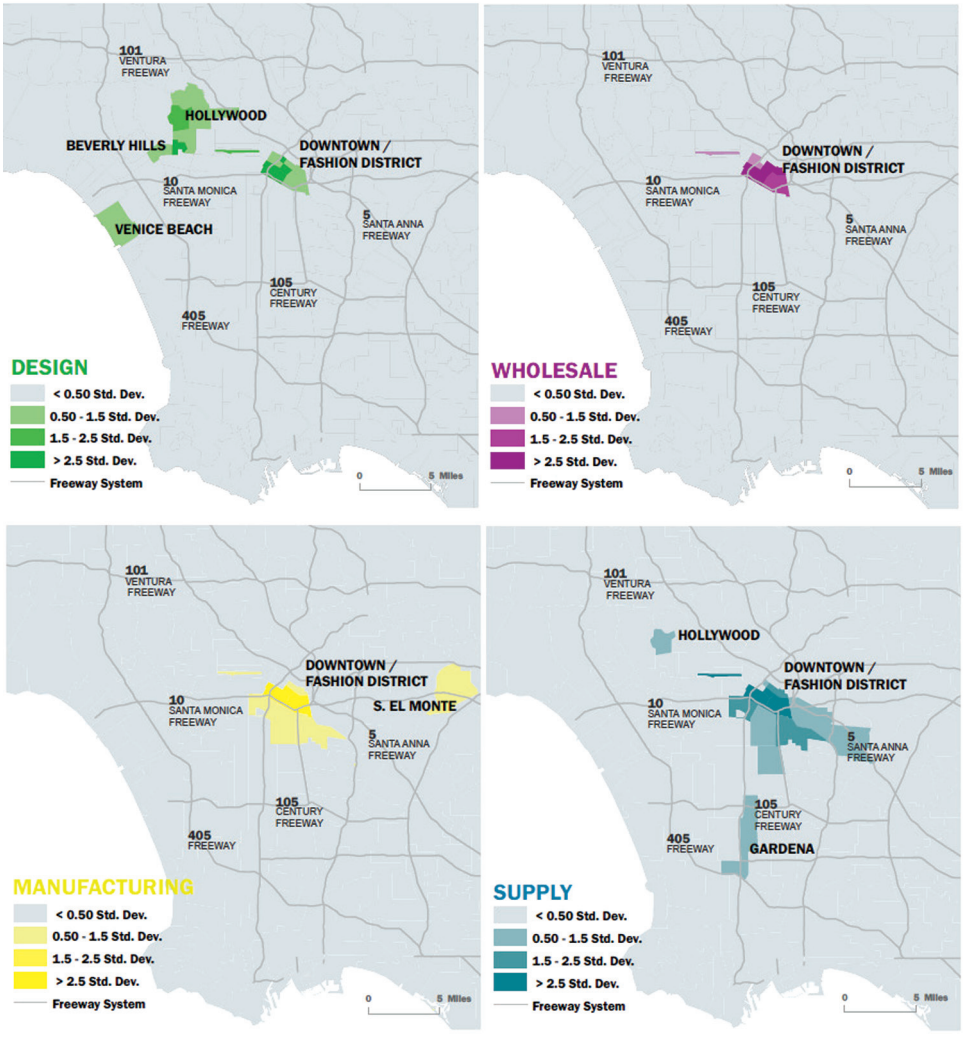

Figure 10. Los Angeles: density of fashion-related industries—represented as standard deviations from the mean.

engages in medium-to-low (MTL) apparel manufacturing that does not require close proximity to designers because the production is less design-oriented and more budget-focused. However, as previous research has indicated, designers have a tendency to be near other aspects of the industry in order to produce the just-in-time parts of their innovation and production processes (Rantisi, 2002; Currid, 2007). We believe this quality of fashion production may explain the concentration of the different sub-sectors of the industry in the downtown core of both cities.

Given the differences in spatial form in the two cities, we employed spatial statistics to understand the extent to which the concentrations of the industry cluster and therefore might exhibit similar or disparate spatial tendencies. The results showed that, while the overall numbers of establishments with the Fashion District in Los Angeles might be less than in New York City, the tendency of the industry sub-sectors to cluster in similar ways was apparent (Tables 1 and 2). The results of the Getis–Ord, G*i or 'hot-spots' statistic shows that wholesale and supply are the two sub-sectors of the industry which are the most concentrated in both cities (see Tables 3 and 4) and this concentration is observed within each city's fashion district. The results also illustrate that fashion design and manufacturing in both cities cluster within the fashion district, but also appear to have secondary clusters or sub-districts outside the district. The hot-spot statistic produces z-scores for values that are spatially clustered: the higher the z-score, the higher the probability that the values (in this case, the number of establishments) have spatial clustering tendencies. In other words, the fact that high values (high number of establishments—i.e. hot-spots), or low values (cold-spots) are near each other is not random.

Wholesale and supply appear to be the most clustered fashion industry sub-sectors in the two cities, a finding which reflects the

Table 1. Moran's I cluster results for fashion industry establishments in Los Angeles

City	*Feature*	*Distance type*	*Distance (miles)*	*Z-score*	*Moran's I*
LA	Supply	Fixed	5	17.75	0.29
LA	Manufacturing	Fixed	5	20.33	0.35
LA	Wholesale	Fixed	5	17.75	0.21
LA	Design	Fixed	5	13.75	0.21

Notes: A positive Moran's I index value indicates a tendency toward clustering, while a negative Moran's I index value indicates a tendency toward dispersion. The Z-score indicates the strength of the clustering: the higher the Z-score, the more the data are spatially clustered.

Table 2. Moran's I cluster results for fashion industry establishments in New York City

City	*Sub-sector*	*Distance type*	*Distance (miles)*	*Z-score*	*Moran's I*
NYC	Supply	Fixed	5	28.17	0.16
NYC	Manufacturing	Fixed	5	30.37	0.19
NYC	Wholesale	Fixed	5	30.54	0.26
NYC	Design	Fixed	5	55.87	0.4

Notes: A positive Moran's I index value indicates a tendency toward clustering, while a negative Moran's I index value indicates a tendency toward dispersion. The Z-score indicates the strength of the clustering: the higher the Z-score, the more the data are spatially clustered.

way these sectors operate. There are economic advantages to wholesale and supply establishments locating in close proximity; this closeness allows buyers to see a greater number of products in a shorter amount of time. In Los Angeles, wholesale appears to be the most concentrated industry sub-sector with a z-score of 13.96. Supply is slightly less concentrated at 11.40. In New York City, supply is more concentrated with a z-score of 30.96 and wholesale slightly less clustered with a z-score of 22.89. It should be noted that, in both cities, the highest z-scores are in zip codes adjacent to each other, further illustrating the concentration of the industry in these areas. In both cities these contiguous high-cluster zip codes are centred within each city's fashion district (Tables 3 and 4). The lower z-scores found in Los Angeles for both sectors illustrate the more dispersed nature of the industry in Los Angeles.

Manufacturing and design establishments in both cities cluster around their fashion districts, but each city also has a secondary cluster elsewhere; this finding shows that, while it is important for these two industries to be near the wholesale and supply chain, other factors influence location choices for industry sub-sectors. In Los Angeles, manufacturing has hot-spot clusters in the Fashion District (z-score of 10.297) and South El Monte (z-score 6.56) a municipality just east of downtown Los Angeles known for its manufacturing base. In New York City

Table 3. Zip codes with the highest establishment 'hot-spot' z-scores for fashion industry sub-sectors in Los Angeles

Zip code	*Name*	*Hot-spot Z-score*
Supply		
90021	Downtown/Fashion District	11.4
90015	Downtown/Fashion District	10.4
90058	South Central	7.12
90014	Downtown, wholesale, fashion	3.66
90011	Central city south-east LA	2.91
Manufacturing		
90015	Downtown/Fashion District	10.3
90014	Downtown, wholesale, fashion	9.03
90021	Downtown/Fashion District	7.93
91733	South El Monte (second cluster)	6.56
90007	South LA	4.44
Wholesale		
90015	Downtown/Fashion District	13.96
90014	Downtown, wholesale, fashion	10.44
90013	Wholesale District/Skid Row	5.48
90021	Downtown/Fashion District	4.95
Design		
90014	Downtown, wholesale, fashion	9.57
90015	Downtown/Fashion District	8.31
90069	West Hollywood (second cluster)	5.18
90046	Hollywood/Hollywood Hills (second cluster)	4.55
90048	Mid city west (second cluster)	3.3

Notes: Z-scores are the result of the Getis–Ord, G*I hot-spot statitics. Higher Z-scores indicate higher levels of clustering. All the Z-scores in the table represent a 99 per cent confidence that the values were not a result of random chance.

Table 4. Zip codes with the highest establishment 'hot-spot' Z-scores for fashion industry sub-sectors in New York City

Zip code	*Name*	*Hot-spot Z-score*
Supply		
10018	Garment District	30.65
10001	South of Garment District	10.5
10016	Murray Hill/Kips Bay	4.069
Manufacturing		
10018	Garment District	30.22
10001	South of Garment District	10.13
11232	Sunset Park (second cluster)	4.89
11101	Long Island City (third cluster)	4.24
10013	North of Garment District	3.8
Wholesale		
10036	North of Garment District	22.89
10018	Garment District	19.71
10001	South of Garment District	12.06
10016	Midtown East	4.3
10017	Midtown East	4.03
Design		
10018	Garment District	28.806
10001	South of Garment District	9.529
10011	West Chelsea/Meat Packing (second cluster)	6.06
10013	Tribeca (second cluster)	5.808
10036	North of Garment District	5.08

Notes: Z-scores are the result of the Getis–Ord, G*I hot-spot statitics. Higher Z-scores indicate higher levels of clustering. All the Z-scores in the table represent a 99 per cent confidence that the values were not a result of random chance.

the fashion manufacturing base is highly clustered in the Garment District (z-score 30.22) but has secondary districts in Long Island City (z-score 4.24), Queens and Sunset Park, Brooklyn (z-score 4.89). Both these areas are just outside the city centre and are known for their manufacturing base. Z-scores of these secondary clusters(4.89, 4.24) are much less than the z-score found in the Garment District centre, showing the dominance of the Garment District in New York. That said, both secondary areas have larger manufacturing buildings and in some cases cheaper rents, which we suspect allows for the economies of scale characteristic of mass apparel manufacturing. Our results indicate that proximity might not matter for some parts of the fashion manufacturing industry because firms can operate in areas outside the traditional fashion district where production costs might be cheaper. This observation is more apparent in Los Angeles. Yet the high z-scores in both cities' fashion centres show that proximity does matter for some of those within the manufacturing sector that depend on proximity more than other facets of the fashion production chain.

Similar to manufacturing, design has secondary neighbourhood clusters in Los Angeles and New York City. However, we theorise that this result may have more to do with the amenities these neighbourhoods offer (for example, the 'buzz') and less to do with cost provisions. Like other fashion sectors, Los Angeles designers cluster in the fashion district (z- score 9.57), yet they

also cluster in Hollywood/West Hollywood/ Hollywood Hills (z-score 5.18), a district which is in close proximity to media and event venues where designers might sell their design ideas and products in a larger global marketplace (Currid and Williams, 2010b). In New York City, a similar pattern can be found. Designers centre themselves near the garment district (z-score 28.06), but also can be found in the more trendy neighbourhoods of the Meatpacking District (z-score 6.06) and Tribeca (z-score 5.808). Informal interviews with designers show that for some locating in these districts might have more to do with the social scene while still being relatively close to the fashion district. Andrew Rosen, the CEO of Theory, decided to move to the Meatpacking District for the storefront retail opportunity it provided, the ability to have manufacturing and design in one location, and the opportunity to work in a more vibrant neighbourhood where his employees could enjoy the trendy local restaurants, clubs and retail (interview, Andrew Rosen, 2010). Generally, designers remain interested in locating in the fashion district, but some designers appear to be interested in being closer to the 'social scene' which allows them to present their products in a larger marketplace and to cultivate buzz and media attention around their products (Currid, 2007).

It should be noted that, while both Los Angles and New York City have secondary clusters in design and manufacturing, the strength of the clustering in each of these areas is less than the primary clusters within each city's fashion core. So, while there appears to be clustering in these secondary areas, the fashion district in each city remains more important. Additionally, the co-clustering of these two fashion sub-sectors within New York City's Garment District is much higher than the secondary clusters, which demonstrates that the Garment District is still the dominant location for these industries within New York City. Contrast this result to Los Angeles: Los Angeles' Fashion District has higher clustering results for manufacturing and design, however, the hot-spot z-scores of the secondary districts are not far behind, illustrating more spatial dispersion in the sectors overall.

An analysis of the spatial statistics highlights that, overall, the fashion industry is less clustered in Los Angeles than in New York, which might be explained by the divergent spatial forms of the two cities and their respective comparative advantage. Los Angeles' fashion industry distributes its low-cost manufacturing throughout its vast suburban areas, thereby creating a greater manufacturing market in this area. New York continues to strongly hold onto the advantages proximity offers within its urban centre's Garment District, developing a specialised market of design and wholesale trade where proximity is highly valuable. At the same time, the results also illustrate that each fashion industry subsector has the tendency to exhibit similar spatial patterns, despite the two cities' different geographical forms.

Discussion: The Multipolarity of US Fashion

Our results speak to a departure from the conventional wisdom that New York is the US definitive fashion capital. In our analysis of the past 20 years, we find that Los Angeles has emerged as an important centre for the fashion industry and has attained its own unique comparative advantage. In pure numbers, Los Angeles is creating its own niche that is both rivalrous and complementary to New York. From a domestic perspective, New York is the design capital, while Los Angeles is becoming the production centre in terms of actual manufacturing and global trade in the wholesale market. While this sector of the industry is not often thought of as the central piece of post-industrial economies, it has become a very important part of Los Angeles' fashion industry's niche advantage, enabling

both cities to be 'fashion capitals' of different parts of the production process.

Los Angeles' emergence as a fashion hub highlights the way in which the industry is evolving into geographically concentrated niche markets. While New York appears to be the 'command-and-control' centre of innovation (Sassen, 2001) in *prêt à porter* (Rantisi, 2004), Los Angeles has been emerging as a centre of both manufacturing and casual sportswear producing medium to high-end labels (for example, Vince, Mike & Chris, American Apparel) that are sold in boutiques and department stores around the world. Thus while New York still maintains its place-based branding as one of the world's leaders in fashion design, Los Angeles is establishing its own distinction that has allowed it to emerge as a multifaceted design and manufacturing hub.

Moreover, Los Angeles has tied some of its fashion industry to the great success of its entertainment agglomeration (Scott, 1996) and the buzz created by celebrities and film stars who frequent LA Fashion Week and are photographed by *paparazzi* in designer clothing for mainstream media (Currid and Williams, 2010a). LA's increased emphasis on its fashion industry is a natural extension of the city's global reputation as a star-studded entertainment complex (Currid-Halkett, 2010).

Policy and planning are at work in both cities and may influence the future trajectories of the industry. Los Angeles has taken a proactive stance to cultivate the fashion industry and the Los Angeles brand. Los Angeles policymakers and planners are working towards making the city's downtown a version of New York's Garment District and are encouraging this growth and proximity in the wholesale and supply sectors. The city's Community Redevelopment Authority is launching a $1 million year-long study entitled the 'Fashion District Design for Development' in order to envision the future of the city's downtown fashion core (Hyland, 2010). Conversely, the New York Planning Department is aiming to rezone the Garment District for more lucrative real estate ventures, a crusade that has been vehemently opposed by local fashion designers and other Garment District workers (Bagli, 2009). New York City planners and officials have argued that the great desirability of the neighbourhood lends itself towards an overall rezoning (Ohrstrom, 2008). Recent efforts by the Design Trust for Public Space, have built a case to maintain zoning in the Garment District through their project, 'Made in Midtown?', which was funded by the Council of Fashion Designers and supported by major fashion labels such as Diane von Furstenberg and Nanette Lepore. (Made in Midtown, 2010). These efforts have slowed plans to rezone the area as the city rethinks how to balance the Garment District's role with the demands of other interests (Pasquarelli, 2010). However, if Los Angeles continues to expand its share of the fashion industry while New York battles out whether or not to support protective zoning for the industry, there is strong reason to believe that Los Angeles will make great strides as a competitor to New York's position as a fashion capital.

There is also the larger reshuffling of the world's economic order, the forces of globalisation opening up markets and the increasing emphasis on the Pacific Rim, particularly the economic juggernauts of China and India (Jacques, 2009; Nolan, 2004; Friedman, 2006; Florida, 2005). Los Angeles' port position as the gateway to the East may make it the obvious place for Chinese wholesale trade and manufacturing goods for the Pacific Rim. The effects of deindustrialisation across the US and increased globalisation have helped Los Angeles' position as a gateway to the East and a place to both import and export goods from afar. Geographically, Los Angeles is in an enviable position to reap the benefits of Chinese consumer culture and to export Los-Angeles-based apparel goods, particularly in the medium-to-low price range. Chinese

consumers are also being watched as the next entrants into the luxury goods market (*Financial Times*, 2010).

While spatial proximity among sectors within the industry matters, our GIS analysis indicates that spatial proximity is slightly less concentrated in Los Angeles and may matter less than we previously thought for low-end fashion, particularly with the rise of 'fast fashion' and the convenience of manufacturing facilities in Mexico and South America (Doeringer and Crean, 2006). We speculate that this finding has to do with the sprawling nature of the Los Angeles metropolitan area and urban form through which manufacturers can take advantage of the lower-cost manufacturing communities just outside the city's core. This current picture of US fashion mimics the economic geography of other cultural industries that have found homes in both major metropolises (Currid and Williams, 2010b; Florida and Jackson, 2010; Scott, 2000).

However, our work indicates that, despite the vast differences in these cities, the industry's sub-sectors tend to form particular spatial patterns that adhere to the social and economic transactions essential to fashion production documented in the extant literature. Even across these disparate geographies, wholesale and supply tend to cluster whereas manufacturing and design have primary clusters that locate near the fashion district and secondary clusters that appear to serve different purposes. For manufacturing, this secondary cluster serves medium to low fashion price points, which requires less dense concentration with other aspects of the industry. In design, these secondary clusters are located in areas of the cities where the 'social scene' becomes important. This economic geography mimics that which has been observed in other innovation-driven industries that require face-to-face contact for information transfer and idea generation but can use more distant geographies for production processes (Sassen, 2001; Christopherson and Storper, 1986; Saxenian, 1994; among others). More broadly, our work affirms many of the observations of how industries organise themselves socially and economically in a post-industrial economy. While much of the previous work has articulated the precise mechanisms embedded in particular places (see for example, Storper, 1997), our work sheds light on the spatial composition of these industrial dynamics. While the two cities produce distinct spatial configurations, we also see an overarching typology of how particular sectors within the industry co-locate and we speculate that the 'map' of the fashion industry strongly correlates with the qualitative work done on the transactions that occur within the industry. We find that, rather than being remarkably different from other innovation-driven industries, fashion, like high technology and Hollywood, tends to produce regional network agglomerations, strong headquarter cities and co-location of particular sectors. Our findings, therefore, are consistent with the larger theoretical and empirical observations on the post-industrial landscape.

Given the infinite and non-ergodic variables that influence economic and geographical outcomes, it is almost impossible to know precisely what turn the US fashion industry will take. However, it is clear that the fashion industry in the US exhibits a bi-coastal spatial form that embodies many of the economic and social forces impacting other post-industrial activity and the cities and regions in which it occurs.

Notes

1. It should be noted that crosswalks are the best estimate between NAICS and SIC code changes. In other words, it is often hard to completely align an NAICS/SIC definition from one year to the next. This difficulty means that, for years in which the codes change, a slight increase or decrease in numbers may be apparent. This is because the code redefinitions in certain industries often do not align completely with the previous NAICS code definitions, creating

a slight variance. It is standard practice to use the BLS crosswalks to perform time-series analysis even with the variances it creates. The crosswalks used are provided in Appendix 2.

2. While retail is an important part of the consumption and revenue generation within the industry, it is not directly linked to the development of products and therefore was not included in the analysis. In order to clarify the various aspects of the fashion industry, we will take a moment to define the four identified sectors. Manufacturing is defined as the range of activities necessary to produce garments. Manufacturers buy materials and carry out the production process from pattern making to sewing to selling to wholesalers and retailers (Bowles, 2000). Suppliers provide the raw materials to manufacturers or they supply manufactured goods to wholesalers. Wholesalers buy great quantities of manufactured goods and then sell these products in smaller batches to retailers. Some major retailers purchase goods directly from wholesalers (for example, Target, H&M). Designers are the innovation arm of the industry. They create initial designs of clothing and jewellery and are involved in various aesthetic aspects of the process (for example, picking out fabrics, patterns or colours) (US Bureau of Labor Statistics, 2007).
3. It is important to note that we are only looking at design from 1998 to 2007. The reason for this methodological approach is because before1998 SIC codes are used and there is no code in the SIC system for fashion designers. The US Census Bureau crosswalks NAICS code 541490 to 1 per cent of SIC code 7399. This is an estimate at best and while the pre-1998 estimates are included, we are concerned that they do not accurately correspond to the previous NAICS code.

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Appendix 1.

Table A1.

Year	*NY*	*LA*	*US*	*NY percentage of national*	*LA percentage of national*
Manufacturing esablishments					
1986	4 097	2 384	21 034	19.48	11.33
1990	3 500	2 881	21 127	16.57	13.64
1995	4 037	3 896	23 879	16.91	16.32
1998	3 875	4 208	20 397	19.00	20.63
1999	3 512	4 045	19 650	17.87	20.59
2000	3 049	4 088	19 399	15.72	21.07
2001	2 780	4 078	18 945	14.67	21.53
2002	2 478	3 793	15 777	15.71	24.04
2003	2 805	4 270	15 728	17.83	27.15
2004	2 602	4 119	14 613	17.81	28.19
2005	2 349	4 025	13 353	17.59	30.14
2006	2 179	3 988	13 133	16.59	30.37
2007	2 050	3 866	12 499	16.40	30.93
Wholesale establishments					
1986	4 449	1 563	17 898	24.86	8.73
1990	4 802	2 044	21 173	22.68	9.65
1995	5 946	2 644	27 330	21.76	9.67

Table A1. (Continued)

Year	*NY*	*LA*	*US*	*NY percentage of national*	*LA percentage of national*
1998	6 648	3 332	29 431	22.59	11.32
1999	6 395	3 373	29 111	21.97	11.59
2000	6 327	3 453	29 039	21.79	11.89
2001	6 155	3 366	28 287	21.76	11.90
2002	6 232	3 626	28 547	21.83	12.70
2003	8 039	4 075	27 523	29.21	14.81
2004	7 878	3 961	26 356	29.89	15.03
2005	7 768	3 887	25 752	30.16	15.09
2006	7 655	3 922	25 408	30.13	15.44
2007	7 801	4 203	26 083	29.91	16.11
Design establishments					
1986	24.26	19.07	331.55	7.32	5.75
1990	23.46	24.41	440.79	5.32	5.54
1995	24.99	24.79	535.96	4.66	4.63
1998	204	85	1 066	19.14	7.97
1999	200	94	1 130	17.70	8.32
2000	202	97	1 172	17.24	8.28
2001	227	118	1 283	17.69	9.20
2002	355	202	1 748	20.31	11.56
2003	459	226	1 702	26.97	13.28
2004	512	242	1 839	27.84	13.16
2005	530	255	1 962	27.01	13.00
2006	549	275	2 025	27.11	13.58
2007	582	287	2 152	27.04	13.34
Supply establishments					
1986	2 514	987	16 972	14.81	5.82
1990	2 120	1 039	16 439	12.90	6.32
1995	2 177	1 242	17 556	12.40	7.07
1998	2 231	1 531	17 526	12.73	8.74
1999	2 147	1 607	17 592	12.20	9.13
2000	1 989	1 587	17 132	11.61	9.26
2001	1 892	1 601	17 086	11.07	9.37
2002	1 707	1 558	16 652	10.25	9.36
2003	2 343	1 693	15 417	15.20	10.98
2004	2 214	1 621	14 781	14.98	10.97
2005	2 067	1 594	14 264	14.49	11.17
2006	1 958	1 542	13 825	14.16	11.15
2007	1 821	1 450	13 527	13.46	10.72

Appendix 2.

Table A2.

	NAICS			
2007 NACIS description	*2007*	*2005*	*2002*	*1997*
Fashion designers				
Other specialised design services	541490	SAME	SAME	SAME
Wholesale				
Men's and boys' clothing and furnishings wholesalers	424320	SAME	SAME	422320
Women's, children's and infants' clothing and accessories merchant wholesalers	424330			422330
Jewellery, watch, precious stone and precious metal merchant wholesalers	423940	SAME	SAME	421940
Home furnishing merchant wholesalers	423220			421220
Supplier				
Textile mills	313	SAME	SAME	SAME
Textile mill products	314	SAME	SAME	SAME
Piece goods, notions and other dry goods merchant wholesalers	424310			422310
Manufacturing				
Apparel manufacturing	315	SAME	SAME	SAME
Leather and allied product manufacturing	316	SAME	SAME	SAME
Costume jewellery and novelty manufacturing	339914	SAME	SAME	SAME
Fastener, button, needle, and pin manufacturing	339993	SAME	SAME	SAME

Table A3.

SIC 1987	*SIC 1977*
Fashion designers	
7399 (1 per cent)	7399 (1 per cent)
Wholesale	
5136	5136
5137	5137
5094	5094
5023	5023
Supplier	
2211, 2221, 2231, 2241, 2257, 2258, 2259, 2261, 2262, 2269, 2273, 2281, 2282, 2284, 2295, 2296, 2297, 2298, 2299, 2391, 2392, 2393, 2394, 2397, 2399, 3069, 5131, 5714	2211, 2221, 2231, 2241, 2257, 2258, 2259, 2261, 2262, 2269, 2271, 2272, 2273, 2281, 2282, 2283, 2284, 2295, 2296, 2297, 2298, 2299, 2391, 2392, 2392, 2393, 2394, 2397, 2399, 3069, 3569, 5133, 5134, 5714
Manufacuturing	
2251, 2252, 2253, 2254, 2273, 2311, 2321, 2322, 2323, 2325, 2326, 2329, 2331, 2335, 2337, 2339, 2341, 2342, 2353, 2361, 2369, 2371, 2381, 2384, 2385, 2386, 2387, 2389, 2395, 2396, 2399, 3021, 3111, 3131, 3142, 3143, 3144, 3149, 3151, 3161, 3171, 3172, 3199, 3961, 3965, 3999	2251, 2252, 2253, 2254, 2311, 2322, 2323, 2327, 2328, 2329, 2331, 2335, 2337, 2339, 2341, 2342, 2351, 2352, 2361, 2363, 2369, 2371, 2381, 2384, 2385, 2386, 2387, 2389, 2395, 2396, 2399, 3021, 3111, 3131, 3142, 3143, 3144, 3149, 3161, 3169, 3171, 3172, 3199, 3479, 3961, 3963, 3964, 3999, 5699