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Mager, Carol L. *Fashion Forward: Need Assessment for a Fashion Innovation Center in the Minneapolis-Saint Paul Region*

Abstract

This need assessment aims to inform local stakeholders about the interest level in developing a fashion innovation center in the Minneapolis-St. Paul metropolitan area. Throughout the history of the Twin Cities, production of outerwear and underwear had been very successful prior to the industry decline of the 1980's – 2000. This research looks at fashion incubator and innovation examples, the local business climate through demographics, influential consumer trends, as well as slow and sustainable fashion trends. Three previous iterations of innovation centers have failed. What is different now? Current trends in Millennial and Generation Z consumer behaviors are encouraging to small batch artisanal designers. Other local designers strive to use more sustainable production practices. This qualitative study used pragmatic semi-structured interviews to get feedback from 20 key industry informants. The interviews were analyzed using thematic interpretation. Study results bring to light factors affecting regional design entrepreneurs that may help shape future development of design-based resources for the region.

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Apparently, they can teach an old dog new tricks!

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Chapter I: Introduction

The apparel manufacturing industry within the seven-county metropolitan area of Minneapolis and Saint Paul, often referred to as the Twin Cities, use to be a vibrant working community with product lines focused predominantly on the underwear and outerwear industries. This is due largely to the extremely cold climate. These two cities along the Mississippi River began as fur trading outposts before Minnesota was even a state. In 1871, just after the end of the Civil War, local manufacturers such as Gordon & Ferguson were making buffalo hide coats to survive the bitter winter conditions (Bader, 2011). Soon afterward, Northwest Knitting Company, later known as Munsingwear, started making its iconic one-piece woolen union suit underwear, finding a niche that propelled the business to great heights. Several other well-known outerwear companies such as Energy Manufacturing and B.W. Harris Manufacturing, developed national reputations for fur coats and outerwear. B. W. Harris made warm jackets lined with sheepskin for soldiers in World War I and created the iconic raccoon coats popularized by college men of the 1920's. As early as 1906, this cohort of companies employed nearly 3% of Minnesota's wage earners, and more specifically employed 14% female workers at a time when women usually encountered stiff barriers to working outside the home (Bader, 2011).

During the depression, the United States' government ordered thousands of work clothes for Civilian Conservation Corps workers from local Minnesota manufacturers, buoying the flagging apparel manufacturing industry in the Twin Cities. Soon after, in preparation for World War II, the government ordered large quantities of field jackets, parkas and bomber jackets made by B.W. Harris and Energy Manufacturing (Bader, 2011). Munsingwear moved from production

of underwear into airplane wing covers, tents, and mosquito netting for the war effort (Bader, 2011).

The years after WWII were boom years for apparel manufacturing in the Twin Cities. Beginning in the late 1970's and throughout the 80's and 90's however, the United States trade policies and international agreements such as the North American Free Trade Act (NAFTA) (Dietz, 2016) as well as Asian currency devaluation, chipped away at domestic manufacturing by opening markets to cheaper overseas apparel manufacturing (Park & Kincade, 2002). Retailers began importing and creating their own in-house brands using cheaper foreign labor in manufacturing. Throughout the 1980's and 1990's apparel manufacturers' businesses within the Twin Cities collapsed and were forced to close their doors (Bader, 2011).

From the 1990's through the early 2000's, the apparel industry in the Twin Cities became much more of a design-based market rather than a manufacturing center. Design-based in this context means the designer sketches the concept image, then sends this paperwork to offshore manufacturers who make prototypes as well as production. Big retailers like Walmart and Target Corporation, as well as smaller businesses, all support hundreds of design and retail-related jobs of this sort (Bader, 2011).

This business model feeds the "fast-fashion" product development cycle that is costly in terms of environmental degradation but cheaply made and extensively marketed (Hethorn & Ulasewicz, 2008). While this arrangement may be cost efficient for retail businesses, it does not take into account the true costs of lax environmental standards, or inhumane labor conditions in third world countries where much of the manufacturing occurs (Brenner, 2014). Many large corporations promoting fast-fashion had contracts with factories in countries like Cambodia and Vietnam that do not have laws governing minimum wage standards, minimum working ages, or

maximum working hours per week laws (Bhardwaj & Fairhurst, 2010). With the increased speed of trend cycles and just-in-time manufacturing processes, came unintended but predictable consequences.

Two of the biggest negative consequences of the fast fashion model of manufacturing are environmental health and poor employee working conditions (Claudio, 2007). Recent statistics show that behind the energy sector, the fashion industry is the second largest polluter, with the second highest water usage (World Economic Forum [WEF], 2016). The global apparel manufacturing industry employs one of every six people in the world, in a \$2.5 trillion industry (Glasgow Caledonian University [GCU], 2017). The fast-fashion retail industry does not consider the heavy carbon footprint cost from the transportation of goods and materials (Gonzalez, 2014). Ever increasingly fast fashion cycles, fed by multi-million dollar social media marketing, creates fleetingly transient styling trends linked to poor quality goods and overproduction (Bhardwaj & Fairhurst, 2010)). Consequently, faster apparel production has increased the speed of obsolescence and garment disposal. Each year, 21 billion tons of clothing and textiles are either deposited in landfills (WEF, 2016) or sent to third world nations, causing huge waste disposal issues (Claudio, 2007).

Improvements in manufacturing technologies, just-in-time ordering systems, and supply chain systems, have all allowed production times to decrease exponentially in support of fast fashion (Park & Kincade, 2011). However, society is now seeing the unintended consequences of fast fashion manufacturing systems illuminated by the negative publicity associated with massive environmental degradation and unethical human rights violations causing tragedies like the 2013 Rana Plaza collapse (Institute for Global Labour and Human Rights, n.d.). Blatant over-

consumptive practices by a willing public are also part of the issues associated with this type of manufacturing (Bhardwaj & Fairhurst, 2010).

In the last ten years, there has been a shift in the way retail apparel businesses work. Amazon and other Internet-based companies have altered how Millennials and the following generations shop for apparel (Siegel, 2016). The immediacy of online purchasing reinforces the speed of change on almost all types of goods and services. Elite fashion shows have recently changed from presenting clothing lines which previously would have been available to retailers in six months, to new “see now, buy now” strategies (Brooke, 2016).

Along with helping automate production, the Internet and social media allow small to medium sized business entities (SMEs) access to larger markets so they also have more opportunity to address the desires of Millennials and other ecologically conscience consumers. There is renewed interest in a design and manufacture locally movement, that is now referred to as the “slow fashion” movement (Clark, 2008). Millennials, Generation Z’s (Gen Z’s) and other generations in increasing number, are asking for products that are more sustainable and have smaller carbon footprints. This means a trackable path to the consumer and a push towards “near sourcing” (Thomasson, 2012). The Internet and modern manufacturing technology may be the equalizers that support the redevelopment of smaller scale apparel manufacturing, specifically in the Twin Cities region. Ecologically based design trends are leading the way for small, more specialized manufacturers to fill niche demand for locally designed and manufactured sustainable fashion (Hoge, 2013).

Returning to the production matters, more recently, there have been three attempts at reviving the local industry by developing innovation centers in the Twin Cities region. The mid-1980’s, saw the first brief attempt at a fashion production training center. The organizer hired a

director from New York, who was not able to sustain the project for more than a year (E1, personal communication, January,16, 2018). In 2004, local designer Anna Lee, created Voltage: Fashion Amplified, a fashion event, as a means to promote Minnesota designers by combining live music and fashion. Two years later, it morphed into MN Fashion, which offered local designers workshops on pricing, sizing, marketing, and other apparel design and production skills. This organization operated until 2010 when Ms. Lee stepped down as executive director, due to lack of funding (D4, personal communication, February 16, 2018). A third attempt by The Makers Coalition was founded in 2011 by Jennifer Guarino, then CEO of J. W. Hulme (a local legacy leather bag maker), and now V.P. at Shinola in Detroit. Along with educators from the Dunwoody College of Technology, as well as other local manufacturing companies, they sought to train students in cut and sew production skills to fill a growing need for local sewn product workers. This organization trained workers for several years, until Dunwoody shut down the industrial sewing training program around 2014. Their graduates were able to find work, however they could not earn a living wage, since local employers did not value their expertise monetarily (Kirchner, personal communications, 2018, May 9). The Makers Coalition then began an affiliation with Industrial Fabrics Association International (IFAI) from 2015-fall 2017 when the association decided the goal of workforce training was not consistent with their mission. The Makers Coalition website currently is inactive and lacks any board member or executive director listings.

While previous apparel production training centers have not been successful, the Twin Cities region is still thriving with other types of innovation centers such as the 3M Innovation Center at 3M Corporate headquarters (Siegel, 2016), Mill City Innovation & Collaboration Center (Grayson, 2013), and the Towerside Innovation District (Central Corridor Funders

Collaborative and City of Minneapolis Great Streets Program, n.d.). The Twin Cities region has 17 Fortune 500 companies. Over the span of several decades, the area has developed a reputation for its outstanding healthcare-related businesses, such as in the Mayo Clinic and Medtronic (Blank, 2016). Innovation in general, is part of the DNA of the Twin Cities.

Currently many small independent designers in the Twin Cities region develop their designs locally and have their product made overseas, then shipped back. Others have tried to both design and manufacture within the continental U.S. and Canada, but not within Minnesota. Very few Twin Cities designers both design and manufacture at a sustainable business scale within the Minneapolis-Saint Paul region. Local entrepreneur E. Kingsbury noted that as local designers strike out to create their own lines, it is difficult to find locally trained professionals who know current industrial production techniques such as scaling patterns to size, laying a marker or doing quantity cutting and sewing (personal communication, March 21, 2016). Some cottage industry operations exist, but these are difficult to contact and do not work in larger scale volumes. They often lack technical garment manufacturing equipment and production level skills (Jung & Jin, 2014). Many young designers have the skills to do some technical jobs, but lack funds for capital equipment, or the business acumen required to become successful entrepreneurs.

These limiting factors have caused many promising designers to move to either New York City or Los Angeles, which is where most apparel manufacturing is based, in the United States. Having coastal access to both material shipping and a low cost immigrant labor market is a distinct advantage to these port cities (Chappel, 1999). Within the Twin Cities, these geographic and logistic deficits may be partially responsible for creative talent drain. If some entity could promote SMEs in apparel manufacturing, local startup businesses would give a

boost to the local economy, and may help meet the desires of Millennials and others for more locally sourced sustainable fashionable resources.

There is one business entity in the St. Paul area that does contract design and production. Clothier Design Source is owned by a local entrepreneur who started the business in 2006 (personal communication, September 25, 2017). This company provides design development, sourcing, production capability and small minimum orders of sewn product. Clothiers recently began offering an “educational academy” which is intended to teach new designers how to develop their product through contractors like Clothiers. It involves a series of six web-based presentations discussing how to work with Clothiers, how to prototype, preproduction steps, what technical design packet development entails, manufacturing processes and quality control issues. These classes are specific to Clothier’s processes and geared to beginning entrepreneurs. The website under Clothiers 4 Step Academy, states that it does not include marketing, funding or business advice (Clothier Design Source, n.d.).

Problem Statement

The Twin Cities region has a wealth of new and existing designers, but not an infrastructure to support sustainably sized regional apparel manufacturing. Data suggests apparel manufacturing employment in the Twin Cities region will decline by 44% by 2024 (Minnesota Department of Employment and Economic Development [DEED], 2017). Designers currently struggle to produce their lines because of the lack of skilled workers and technical equipment available. This causes talented designers to seek resources elsewhere, forgoing the possibility of creating locally designed, sourced and manufactured goods. The local business community also needs manufacturing opportunities for low wage-low skilled workers and immigrants who traditionally have worked in apparel manufacturing jobs. Local designers end up moving to Los

Angeles or New York City for access to manufacturing facilities and materials, instead of staying local, which is a talent drain for the region. There is also relatively little academic research related to fashion incubators and innovation centers specifically.

Purpose of the Study

The purpose of this study was to determine the need for a fashion innovation center (FIC) in the Twin Cities region. This study sought to determine if local stakeholders would support a fashion innovation center. The rapidly changing apparel retail environment and a growing segment of the population increasingly interested in sustainably produced and locally manufactured fashion, could give Twin Cities' design entrepreneurs an opportunity to take advantage of these societal trends.

The objectives of this investigative research project were to answer the following questions:

1. To what extent would local stakeholders support a fashion innovation center?
2. What are the barriers to developing a fashion innovation center in the Twin Cities?
3. What are potential benefits of developing a fashion innovation center in the Twin Cities?
4. What types of partnerships are necessary to support a fashion innovation center?
5. What does a fashion innovation center look like if developed in the Twin Cities?

Assumptions of the Study

The assumptions of this study are:

1. The researcher assumes there should be a fashion innovation center in the Twin Cities region.
2. Responses to interviews are candid and unprejudiced.

3. The interviewer does not prejudice responses.
4. Interview transcriptions are accurate and precise.
5. Interviewees know what a fashion innovation center is and how it functions.

Definition of Terms

This section is intended to clarify major terminology used in this study. Several terms have more than one generally understood definition, so it is imperative that the specific intended use be distinguished within this study.

Fashion hub. A geographic epicenter where four key fashion-related business sectors (supply, wholesale, manufacturing, and design) combine making the density of fashion related industries large enough to create an economy of scale (Williams & Currid-Halkett, 2010).

Fashion incubator. A formalized program sponsored by one or more major business concerns that offers “Designers in Residence” the opportunity to be mentored by industry leaders in design and manufacturing as well as marketing and business training (Brannigan, 2017).

Fast fashion. The fashion industry has decreased product time to market and lowered apparel goods pricing so greatly by sending production offshore, that sustainability experts feel the term “fast fashion” has come to mean “buying of new, inexpensive clothes every couple of weeks...and if it falls apart, you just toss it away!” (Hethorn & Ulasewicz, 2008 p.146).

Innovation center/innovation hub. Also known as a location offering shared workspaces, specialized equipment, business resources, and industry experts on staff who help educate and support designers needing experienced assistance to improve or create and launch their own design businesses. These centers may be private or publicly funded and offer various levels of support and funding structures. In 2005, Phan wrote about the emphasis on sharing

knowledge, resources, and stimulating innovation and competitiveness in a nurturing environment (as cited in Ayatse, Kwahar, & Iyortsuun, 2017).

Minneapolis and Saint Paul seven-county metropolitan area – also known as the Twin Cities region. The area encompassing the cities of Minneapolis and Saint Paul include these seven counties: Anoka, Carver, Dakota, Hennepin, Ramsey, Scott, and Washington. This region has a population of almost three million people and an area of about three thousand square miles. It is located in southeastern Minnesota, straddling the upper Mississippi River (Metropolitan Council, n.d.).

Pop-up retailing. A recent trend in apparel retailing where a short-term retail space opens up for a set time period, then is gone. (Trotter, 2017). Sometimes called “flash retailing” an older example is a typical farmers market open only on a certain day of the week.

Slow fashion. A fashion movement that aims at designing, producing, consuming and living more fulfilling lives by slowing down the fashion cycle, moving from quantity- to quality-based [purchasing]. Slow fashion is not just the opposite of fast fashion, but it is about more sustainable and ethical ways of being fashionable (Jung & Jin, 2014).

Small to medium sized enterprises (SME). Business firms having a small to medium sized staff, and/or revenue. It usually includes firms listed in the Russel indices such as Russel 2500 index and Russel Midcap index. For this study, the number indicates those companies with 50 - 250 employees (Business Dictionary, n.d.).

Limitations of the Study

The limitations of this study are:

1. The information gained is specific to and limited by the Twin Cities seven-county regional area.

2. It involves reviewing similarly sized population centers as the Minneapolis-St. Paul region that are centrally located in the U.S.
3. It is conducted over a three-month timeframe.
4. Findings may not be generalizable due to region-specific business, government, and educational institutions.
5. The size and demographic makeup of the cities and regional area is specific to the Twin Cities.
6. Poorly defined wording of question 6 of the interview instrument, gave responses that were unclear and overly broad, so that those responses are of questionable value.

Chapter II: Literature Review

The purpose of this study was to determine the need for a fashion innovation center in the Twin Cities region. This study sought to determine if local stakeholders would support a fashion innovation center. To evaluate the need for a FIC, the literature review will focus on four main areas: fashion incubators, local business climate and regional demographics, influential consumer trends, and the slow fashion movement.

Fashion Incubators

The fashion incubator concept began in 1987 when the city of Toronto Canada initiated the first such entity hoping to reenergize its local fashion industry (Toronto Fashion Incubator [TFI], 2017). It was a non-profit joint venture between the Fashion Industry Liaison Committee (FILC) which was a volunteer organization funded by the City of Toronto's Economic Development Division. Additional start-up funding was provided by the Federal Innovations Program of Employment and Immigration Canada organization, and it has continued to be supported through operating grants after receiving official "incubator" status by the City of Toronto Economic Development Corporation (TEDCO). The fashion industry was Toronto's second largest industrial employer before the economics of offshoring production drained their manufacturing base (TFI, 2017). Realizing their economic wellbeing was at stake, the city sought to create an engine that could foster design talent and encourage entrepreneurial education while supplying cooperative space, equipment and access to materials, supplies and experienced coaching.

The framework of the TFI is to offer two types of membership with different cost structures (TFI, 2017). The most involved level is as a resident, in which one rents a private studio workspace, have individual mentoring sessions, as well as full access to professional

manufacturing equipment and instruction. It entitles the designer to join seminars, take master classes in design, marketing, and business planning. Designers rent their studio workspace from TFI directly.

The lower level is the outreach membership, which for the annual fee of \$140.00 CAD provides access to their 8,000 square foot work space, some individual mentoring time, educational seminars, optional master classes, shared workspace, networking opportunities, promotional and marketing assistance, trend and resource contacts. As the oldest fashion incubator program, TFI became the model for many other programs throughout Europe and the United States (TFI, 2017).

New York City created their own version of the TFI in 2014 with the opening of Manufacture New York (Selko, 2014). Under the direction of Bob Bland, this program is a public-private initiative to promote small businesses returning to support the existing manufacturing sector still found in New York. They receive funding in the form of grants from the Fashion Manufacturing Initiative, the Council of Fashion Designers of America (CFDA) and the New York City Economic Development Corporation (NYCEDC). Their function is to provide space for local designers to create, manufacture and market their lines in New York. This incubator specializes in cooperative sourcing, sustainable manufacturing technology and offering public awareness campaigns (Bland, 2013).

Several other smaller cities have taken on the incubator model in conjunction with a large corporate sponsor, such as Macy's (Brannigan, 2017). Chicago began formulating their own incubator first in response to former Mayor Daley's 2005 Fashion Focus Chicago initiative. After three years, Macy's offered their State Street flagship store's 11th floor space which was then renovated and equipped with industrial cutting tables, sewing equipment, pressing stations

and tools. They also have a media room to make presentations and show lines to buyers (Chicago Fashion Incubator, n.d.). The Chicago Fashion Incubator (CFI) is a not-for-profit 501(C) (3) entity. They get grants from the City of Chicago, Driehaus Design Initiative, Macy's, Schiff Hardin, and the Chicago Cultural Mile (Chicago Fashion Incubator, n.d.). Their mission is to help designers learn technical product development, tutor them in business knowledge and help them launch their lines globally. The structure of this type of fashion incubator is to offer six Chicago-based designers a "designer in residence" position for a period of two years. This cohort works together, learns together, and develops their skills in an open workroom environment. Industry experts mentor these six designers in product design, planning, manufacturing, and quality assurance. They are also given legal, financial and marketing assistance. Together, they learn all aspects of entrepreneurship to then launch their own lines. CFI collaborates with local design schools, suppliers, contractors, as well as marketing and media companies. An impressive list of resource representatives all donate assistance or expertise as necessary, and are listed sponsors on their website.

Besides the Chicago Fashion Incubator, Macy's also sponsored similar incubators in Philadelphia, San Francisco (FiSF), Miami, and Washington DC (DCFI) (Fashionista, 2017). These incubators generally use the same basic structure as CFI with some minor differences. For example, the DCFI in Washington D.C. has a one-year educational program (DC Fashion Incubator, 2017). It has additional programs such as *#MadeInTheDistrict (MITD)-Fashion* for existing designers to get back-end help for production, *#MadeInTheDistrict-Business* for assistance in the business side of the fashion industry, and *#MadeInTheDistrict-Entrepreneur Incubator* that is the combined fashion and business program. Only participants of the MITD

Entrepreneur Incubator are eligible for the “designers in residence” program at Macy’s Metro Center facility.

There are independent innovation centers that use other structural models as well. Examples of these are the Nashville Fashion Alliance (Nashville Fashion Alliance, 2017), the Denver Design Incubator (DDI), Detroit Garment Group (DGG), and the Saint Louis Fashion Incubator (SLFI) (Brannigan, 2017). Nashville went through extensive planning and a \$100,000.00 Kickstarter fundraising campaign for start-up money. They also have a notable list of underwriters such as Bayer e3 Sustainable Cotton, Tennessee Valley Authority, and the Nashville Convention & Visitors Corporation which funded a formal economic impact study projecting out potential business growth to 2025 (Nashville Fashion Alliance, 2017).

Nashville, Denver, Detroit and St. Louis all have some things in common. First, they are not trying to compete with New York (N.Y.) and Los Angeles (L.A). Their goals are to revitalize their local fashion industries that could potentially improve the local economy as well. These communities are supportive of their fashion industries. Business and educational partners are cooperating to make localized fashion production possible. They are not aiming for large-scale production, such as that for Walmart or Target. The goal is to create smaller more sustainable lines using more efficient production technology and utilizing local suppliers to minimize their carbon footprint (Brannigan, 2017). Sometimes they have local talent for instruction, and sometimes they draw industry talent from New York or L.A. Several designer transplants have moved back to smaller cities for better quality of life. They enjoy more cost-effective and commutable city life (Brannigan, 2017).

Denver and Detroit incubators turned to crowd funding to raise capital. The St. Louis Incubator had the St. Louis Fashion Fund promoting a \$2 million fundraising venture called

Campaign for Fashion (Saint Louis Fashion Fund, 2017). The SLFI uses the same format of sponsoring six local area based designers for a two-year training program. It gives designers access to industry tools as well as mentoring to help them launch their businesses. This program started with their first class in January of 2017. The Denver Design Incubator (DDI) is funded as a 501(c) (9) organization and they sell memberships more like the TFI. They have a “library card” ala cart model that offers options such as the sourcing library, a one-day studio pass, a one-year punch card, monthly membership, as well as a corporate membership level. Clients may also purchase supplies in smaller quantities than the industry would usually allow (Denver Design Incubator, 2017). This incubator functions more like an artists’ cooperative.

Fashion businesses have historically supported low-wage low-skill workers, often times new immigrants, as they learn a trade to support themselves (Chapple, 1999). Keeping and encouraging new designers and manufacturing within the region would allow entrepreneurs to deliver more sustainable products and help support markets for independent designers. It would bring manufacturing jobs back to the region and help low-wage low-skill workers find occupation in a renewed industry.

In order to understand how an innovation center or incubator type entity may be helpful in addressing local apparel manufacturing, it is important to review what types, and how incubators have assisted in reinvigorating dormant production centers, or accelerated existing business ventures. However, there is almost no existing scholarly information dealing specifically with apparel manufacturing incubators. There is, however, information regarding other types of business incubators, which might be useful to understanding how this type of entity addresses the issues local apparel manufacturers and new entrepreneurs have encountered.

A study by Grimaldi and Grandi (2003) categorized four basic types of incubators. These are Business Innovation Centers (BICs), University Business Incubators (UBIs), Independent Private Incubators (IPIs), and Corporate Private Incubators (CPIs). All models are intended to help new business entities by supplying support services and professional advice to developing businesses. These researchers surmise that four types of incubators are differentiated based on the needs and specific requirements of potential incubatees. Grimaldi and Grandi, categorize incubators into two specialized models described as Model 1 and Model 2. Model 1 is publically and regionally funded, and follows a more traditional business model. Model 1 businesses often require assistance with physical assets, access to funding, supportive and creative working environments, and have a mid to long-term development orientation.

Model 2 businesses consist of private incubators who take on businesses that already exist, but are in need of financing and high value assets such as knowledge or technology-based companies that have a short-term development orientation. Grimaldi and Grandi (2003) describe the University Business Incubator as a hybrid, in that it is the one category of incubator that overlaps both Models 1 and 2 with university support having the ability to perform functions of either model for potential incubatees.

In their conclusions, Grimaldi and Grandi (2003) determined that “[t]he efficacy of the two main incubating models should be viewed as related to the degree of process integration between the tenants’ requirements and the incubators’ incentives, nature and objectives, rather than from the individual perspectives of the tenants or the operators” (p. 118-119). These findings support the view that incubators should specialize and that there is need for all four types of incubators in the business community.

An article by Hackett and Dilts (2004) focuses on an historical review of the literature regarding business incubators. Starting as early as 1959, the authors discuss the lack of commonly accepted understandings of the terms and concepts of business incubation. Further, they identify a “lack of meaningful incubator classifications, ...process models... definition and measurement of incubator-incubatee ‘success’” (Hackett & Dilts, 2004, p. 56). Later, they examine incubator configuration frameworks offered in the literature as well as various methods of choosing incubatees.

Key findings state that it is important to match incubatees’ needs with the incubator that best meets these needs, and that direct feedback to incubatees is instrumental to their business development. Another finding was that the level of incubator maturity was predictive of the success of the incubated start-up. Hackett and Dilts (2004) determined that graduating from an incubator was considered a key measure of success. The subject of what constitutes a “successful” incubator needs further clarification if it is to be used as a measurement tool. Is it the students’ success at launching a business, or the incubator’s success? Reported levels of incubator survival success, range greatly from over 80% to less than 55%. Other interesting findings were that despite claims that incubators are very good at creating local jobs, the evidence is generally contradictory. Hackett and Dilts determined that incubators are more cost-effective economic development tools than government programs to attract firms to a region, but that their actual economic improvement impact is extremely understudied.

Hackett and Dilts (2004) then discuss network theory, where they conclude that incubation success can raise the level of entrepreneurial intensity, and improve economies of scale and scope. Other studies within Hackett and Dilts’ research supported findings that incubators are efficient at reducing early development stage business costs, and that incubator

configuration must meet the local needs and norms. In their discussion of for-profit versus non-profit configurations, Hackett and Dilts note that the research regarding the sustainability and profit-oriented incubator models are less efficient than the non-profit models due to relatively lower fixed costs and expectations. The authors further state that it might “represent a better, more politically rational model for allocating community resources and demonstrating the community’s long-term commitment to facilitating economic development through entrepreneurship” (Hackett & Dilts, 2004, p. 71). Finally, they conclude that future research should focus on incubation process rather than on the details of the facility and configurations.

To evaluate fashion incubator structures like the original Toronto Fashion Incubator, it is important to note, there is a large percentage of governmental financial support for the enterprise. It is open to anyone who purchases one of two levels of support. Training is more on an individual needs basis. No hard timeline is associated with residency.

In the U.S., the Macy’s affiliated models have taken a more commercial support approach, although they originally started as city initiatives to revitalize local business communities. Local businesses, suppliers, contractors, government economic agencies, and educational institutions cooperate to support and finance these organizations. Each of these incubators take on six locally based designers for about a two to three year intensive training period, after which they should be able to launch their own businesses.

Independent innovation centers function more as cooperatives offering memberships and charging for classes, training and equipment as their ongoing source of support. They use either crowd funding or foundation fundraising to get their start-up money. Understanding how fashion incubators or innovation centers are initiated, structured, and funded helps explain the community drive behind them. The demographics of similarly sized and geographically

common fashion innovation centers should help fill in the missing information regarding what might be possible for the Twin Cities region.

Local Business Climate and Regional Demographics

Using current statistics from the Metropolitan Council, which is a regional planning and policymaking agency, gives a clearer picture of the business climate in the area. The population of the seven-county metropolitan area in 2016 was 3,041,526 (Metropolitan Council, n.d.). The regional forecast is for an increase in population through 2040 from current levels to 3,738,000 according the Metropolitan Council Regional Forecast (June 2017). With this growth come demographic shifts in race and ethnicity. The three major changes will be:

1. Latino population will increase from 168,000 in 2010 to 373,000 in 2040 becoming 10% of the total population, up from 6%.
2. Black and African American population increases from 234,000 in 2010 to 508,000 and will constitute 14% of the population, up from 8%.
3. Asian population and other non-Latino race groups will increase from 274,000 in 2010 to 588,000 in 2040 and will increase from 10% of the population to 16% by 2040 (MetroStats, 2017, p. 2).

Another major change will be the median age of the population. By 2040, 20% of the Twin Cities Metro area will be age 65 or older. Schools and workforces will be more racially and ethnically diverse and with increases in the aging population, may cause shortages in the workforce and lower school enrollment numbers (MetroStats, 2017).

The Minnesota Department of Employment and Economic Development Agency (DEED) gives a detailed breakdown as well as an overview of this region's economic factors. The major trend in the Twin Cities region over the past sixteen years has been slow but

consistent labor force growth. From 2006 to 2016, annual labor force growth averaged 4% (about 7,000 people added annually), however, between 2015 and 2016 there were more than 18,700 workers added to the workforce representing a growth rate of 1.1% (Minnesota Department of Employment and Economic Development [DEED], 2017).

Table 1 shows Twin Cities Metro Manufacturing Industry Employment Statistics from the third quarter of 2016. Breaking out the North American Industry Classification system (NAICS) codes for Apparel Manufacturing (315), Textile Product Mills (314), and Leather & Allied Product Manufacturing (316), it outlines the number of companies and jobs employing people in this group of industries (Minnesota Department of Employment and Economic Development, 2017). The documentation from the DEED Quarterly Census of Employment & Wages (QCEW) program gives a detailed breakdown of payroll and weekly wages in these three categories. This table describes the number of firms within the Twin Cities metropolitan area that are producing textile products, apparel, leather and associated products. It also lists the number of jobs in each category, the quarterly payroll, and the average weekly wages as of the third quarter of 2016.

Table 1

Twin Cities Metro Manufacturing Industry Employment Statistics, Quarter 3 2016

NAICS Code	NAICS Industry Title	Number of Firms, Q3 2016	Number of Jobs, Q3 2016	Quarterly Payroll, Q3 2016	Avg. Weekly Wages, Q3 2016
314	Textile Product Mills	61	619	\$5,214,199	\$647
315	Apparel Manufacturing	49	347	\$3,484,133	\$772
316	Leather & Allied Products	6	199	\$2,483,085	\$959

Source: DEED Quarterly Census of Employment & Wages (QCEW) Program

Table 2, Twin Cities Metro Manufacturing Industry Projections, highlights projections for these same three categories from 2014-2024. It displays the estimated employment, projected employment numbers, the percent of change, and the numeric change expected to occur (DEED, 2017).

Table 2

Twin Cities Metro Manufacturing Industry Projections, 2014-2024

NAICS Code	Industry	Estimated Employment 2014	Projected Employment 2024	Percent Change 2014-2024	Numeric Change 2014-24
314	Textile Product Mills	588	383	-34.80%	-205
315	Apparel Manufacturing	328	181	-44.80%	-147
316	Leather & Allied Products	209	231	10.50%	22

Source: DEED Employment Outlook

The expected decline in textile product mills and apparel manufacturing is -34.8% and -44.8% respectively. Only the leather and allied product sector is relatively unchanged with 10.5% growth expected. These projections indicate a continuing decline in apparel design and manufacturing employment in the coming decade if there is no major disruption in the local economy (DEED, 2017).

The forecast indicates local apparel-related industry will decline. Other logistical factors work against the region in efforts to become a successful small to mid-sized apparel design and manufacturing center. Williams and Currid-Halkett (2011) cite specific business practices as key in making Los Angeles and New York City major hubs. These include practices such as restructuring the local manufacturing industry to become a more contract-based model, and supporting a continuing influx of migration of Asian and Hispanic workers. They also both have highly developed mass transit systems (Chapple, 1999). Another especially important element, as noted by Williams and Currid-Halkett, is an adequate concentration of suppliers, wholesalers, manufacturing facilities, and design talent to create an economy of scale. While the Twin Cities may not currently have the same conditions and geography that helped develop New York and Los Angeles fashion hubs, the Midwest region is developing its mass transit system. It will gain population over the next several decades and the region will become more ethnically and racially diverse (METROSTATS, June 2017).

Several other economic trends are encouraging to local designers and manufacturers. Some apparel companies are bringing back (reshoring) small scale, high-value-added manufacturing (Joint Economic Committee, United States Congress, 2016). Retailers may be reshoring because they are requiring smaller production runs and faster turn times to maintain the fast-paced demand that fast fashion has created. The “Made in America” campaign is another

reason some retailers have brought back parts of their manufacturing. They also use domestic production to maintain their reputations as good corporate citizens (Joint Economic Committee, 2016). In the report, *The New Economy of Fashion*, the Joint Economic Committee, United States Congress (JECUSC) outlines strong indicators that the fashion industry, especially the design and high-tech manufacturing sectors are “poised for a resurgence as it concentrates on the high-value parts of the apparel global supply chain: research and development (R & D), design and marketing” (JECUSC, 2016, p. 1). This report also mentions that smaller U.S. cities are developing fashion centers enabled by industrial clustering, the availability of elite fashion schools, and highly skilled employees currently working in the industry. New York City maintains its reputation as the design-based capital, and Los Angeles remains the manufacturing-based capital, but the report notes secondary hub cities (San Francisco, Columbus, Nashville etc.) as having a strong economic rationale. This report cites research showing that by clustering similar design and manufacturing businesses in close proximity, it enhances the pool of labor, builds relationships between suppliers and producers, fosters innovation, and productivity, which can enhance economic opportunity for workers in both the design industry and ancillary businesses (JECUSC, 2016, p. 2).

Influential Consumer Trends

Evaluating consumer market trends is the key to determine the target market for future fashion consumers’ behaviors and understanding what they want. For most of the apparel retail industry, the predominant group of influencers is now the Millennial generation (Mahler, 2015). Millennials are defined as those born between 1982-2002 according to the Pew Research Center (2016). This generation is characterized as being tech savvy, goal oriented, optimistic, connected at all times, diverse, highly educated, and strongly global, civic and community-

minded (Reynolds, 2005). Data shows that consumers under 25 earn only about 54 percent of what older consumers earn on average, however the college educated Millennials spend a significantly higher proportion of their income on apparel items than older consumers (Lee, Kim, & Yang, 2015).

Marketing firms and large retailers are very uncertain about how to market to Millennials. This cohort is pushing to change the way business is done (Mahler, 2015). Millennials have signaled they are willing to pay more for services and brands that are committed to sustainable practices and ecologically sound resources (Johnson, 2015). What this means in terms of definition varies widely, but in general both Millennials and the following Generations Z (Gen Z), “are willing to pay more for products and services that come from companies who are committed to positive social and environmental impact” (Nielsen, 2015). It is no longer acceptable that corporations do business in a way that allows them to check off the box under corporate social responsibility (CSR). Millennials, Generation Z’s (Gen Z’s) and other generations in smaller numbers, want “inherent sustainability” which they view as directly helping consumers or some specified group, live sustainable lives (Mahler, 2015, para. 7). The Nielsen Global Survey taken in 2015, shows that “66% of global respondents say they would pay more for products from companies committed to positive social and environmental impact, up from 55% in 2014, and 50% in 2013” (Nielsen, 2015, November 11, para. 7).

Gen Z members (born in 1998 or later), have been called Millennials on steroids because they also love online shopping, although they are fiscally more conservative therefore they are also looking for deals (The Atlantic, 2017). Gen Z’s are much more multiracial and tolerant of diversity. There are more than 70 million Gen Z’s in the U. S. and they will have more purchasing power than the Millennials (The Atlantic, 2017). They are also digitally adept and do

not want to wear or purchase regular designer labels. As with Millennials, they are looking for deeper value in the products they purchase. The segment of consumers who chose to live sustainable lifestyles are deeply concerned about health issues, the environment, social justice, and personal development (Yeh & Chen, 2011). Emerich (2000) asserts these consumers make up more than “30% of the American, Japanese, and European populations representing an estimated \$340 billion US market and a \$546 billion market worldwide” (as cited in Lee, Kim & Yang, 2015, p.1).

Slow Fashion

The slow fashion movement began in the mid 2000’s. It is an offshoot of the slow food movement but the roots are very similar. With slow food, the movement sought to counteract the fast food frenzy that began thirty years ago (Clark, 2008). They sought to return food to importance in everyday life. Parkins and Craig, (2006) are quoted by Clark as saying “food should be approached with care and attention...an attempt to live in the present in a meaningful, sustainable, thoughtful and pleasurable way” (Clark, 2008, para. 4). A connection exists between the food we eat and the vendor who grew it. It is the same connection with slow fashion. This process creates an increased valuing of apparel made with care and handwork. Fletcher (2008) was one of the first to define slow fashion:

Slow fashion is about designing, producing, consuming and living better....it is not time-based but quality-based (which has some time components). Slow is not the opposite of fast – is not dualism – but a different approach in which designers, buyers, retailers and consumers are more aware of the impacts of products on workers, communities and ecosystems (p. 61).

The premise is to care about what you make, do your best work, take the time necessary to do a quality job, and use quality materials and inspired design. It will cost more initially, but the beauty of producing this way is that the consumer buys less, and values what they have more. Consumers will wear it more and it will last longer since it is made well and of high quality materials. Slow fashion is about changing the purchaser's mindset from quantity to quality (Fletcher, 2007). The client takes great pride in having a handcrafted item that is one of a very limited quantity ever made. Each one is individual and almost akin to couture (high fashion handmade items from Europe) in that respect. This type of quality, along with other eco-friendly design and fabrication aspects, raises the pricing structure but warrants the increased cost (Clark, 2008).

Another one of the main outcomes of this type of production scheme is the utilization of localized physical infrastructures as well as supporting resources in the community. Like the local farmer that raises fresh vegetables, the designer would not only conceive and specify the product locally, but bring the production facilities to the community to assist in manufacturing to the highest standards. Local production "gives rise to a ...distributed economy" where a network of local systems develop supporting design businesses (Clark, 2008, p. 428).

With locally designed apparel, consumers get off the fashion treadmill created by ongoing trend marketing. Local design reflects local culture and use of local resources. As an example, the Twin Cities has a wealth of Hmong artisans. Sewing is very important in their culture and their designs are often highly decorated with intricate handwork (Lor, X. n.d.). According to local Twin Cities Hmong designer Yayao Xiong, clothing lines of Hmong designers often stand apart from mass fashion because of distinctive silhouettes and detailing

(personal communication, October 31, 2017). Slow fashion designs give strong cultural and material value to the client when they know the backstory (Clark, 2008).

Cooperative and productive communities work together and link more transparent production systems into the manufacturing process. When the consumer knows the people who made their clothes, they know there is a story, a concern and an individualism behind it. This is the type of interrelationship and emotional connection, which develops with slow fashion pieces, especially if the production is also done locally (Jung & Jin, 2014). Ancillary businesses usually benefit as well as the original manufacturer. Another benefit of the slow fashion movement is that the manufacturing process becomes intrinsically more ecologically balanced. Making apparel in small batches (limited availability), tends to increase intrinsic value, and reduce overproduction and waste product (Cline, 2012).

Summary of the Literature

This section focused on reviewing the literature in four key areas: fashion incubators, local business climate and regional demographics, influential consumer trends, and finally the slow fashion movement. The information gathered helped inform and substantiate the underlying issues surrounding a lack of infrastructure in support of apparel and sewn goods production. Descriptions of types and functions of incubators illustrate potential models. Demographic apparel jobs levels and sewn production data starkly shows the reality of the regional apparel production industry if nothing is done to alter the outcome. Consumer trend data illustrates a potential rebound of small-batch artisanal slow fashion-type production in the region. Together this information sets the stage for reflecting on the data collected and further supports research analysis and conclusions.

Chapter III: Method and Procedures

The purpose of this study was to determine the need for a fashion innovation center in the Minneapolis-St. Paul metropolitan area. The data collected helped answer the following research questions:

1. To what extent would local stakeholders support a fashion innovation center?
2. What are the barriers to developing a fashion innovation center in the Twin Cities?
3. What are potential benefits of developing a fashion innovation center in the Twin Cities?
4. What types of partnerships are necessary to support a fashion innovation center?
5. What does a fashion innovation center look like if developed in the Twin Cities?

This chapter relates the research methods, subject selection process, described the research instrument, and broke down the data collection procedures used. It further described the data analysis methods and limitations of the study.

Research Methodology

This study followed a qualitative applied research framework, which according to Patton (2015), analyzes a societal issue or concern then looks for solutions. In addition, this research looked at current economic, demographic and business environment conditions at a brief point in time and in one localized area, so the most effective research design was a thematic descriptive methodology. Observing and reporting on phenomena in one place and time gives a baseline of knowledge from which to evaluate further developments (Gall, Gall, & Borg, 2007). It involved using pragmatic semi-structured interviews in order to get candid feedback, emotional responses and personal experiences from industry and educational experts. Patton (2015), specifically calls out this creative method of interview as successful in engaging research area experts because it

calls upon the interviewer to be open to whatever emerges “from design, through data collection and into analysis” (p. 492). Open-ended questioning allowed interviewees to use their deep knowledge and imagination in answering. Since this study was a need assessment, all possible solutions must be available for interviewees to put forth. As Lee and Nelson (2010) posit, macro-level needs assessment can focus on the issues of stakeholders as a group and offer different strategies and solutions to these issues through thoughtful analysis. As referenced in Gall, Gall & Borg (2007), using expert-based evaluation is a traditional and widely accepted method of evaluation. Guided semi-structured interviews with open-ended questions were used to gather data. Open-ended questions could be modified as the situation warranted (Patton, 2015). By using guided semi-structured interviews with open-ended questions, it insured that; variation was minimized, the instrument used was available for inspection, the interview was efficient and focused, and that resulting data was easier to find and compare (Patton, 2015). A pragmatic and utilization-focused interview format aimed at getting real-world feedback that could lead to useful practical insights. As Patten (2015) states, there are five principles to follow when using pragmatic utilization-focused interviews;

1. Frame the purpose as practical and action oriented
2. Identify and work with people who can bring about change
3. Ask action-oriented questions that will yield concrete answers
4. Work with intended users to facilitate engagement with and interpretation of findings
5. Follow through to implement and evaluate implementation of recommended actions

(p. 172-173)

Using this framework mirrored the goals of the study to answer the five research questions presented initially. It also offered the possibility of learning from industry experts what their

beliefs about the need for a FIC is, and potentially other possible solutions that this researcher may not have considered.

Subject Selection and Description

This study used purposeful sampling methods to find subjects. Key industry informants were chosen to give a more robust perspective of how local designers, fashion educators, recently graduated working fashion alumni, larger corporation and trade business representatives, as well as local small and medium sized entities (SMEs) fashion entrepreneurs view the need for an FIC in the region. Industry informant feedback was needed to discern their feelings about the business climate and industry growth potential. Purposeful utilization-focused sampling ensured group characteristics of interest in the Twin Cities fashion industry by key informants (Patton, 2015).

A research participant list was developed comprising Twin Cities based apparel designers, some of whom produce domestically, some who produce offshore, and merchants who design or select and order product from offshore sources. Fashion educators and recent alumni from Twin City schools having fashion programs were interviewed. Retail related fashion businesses and supporting fashion industry businesses were included. Some contacts were made, as Patton describes (2015, p. 298) from “snowball” or chain sampling. This opportunity occurred when interviewing multiple key informants, several whom recommended the researcher speak to the same specific person. These multiple-referred subjects were highly recommended, and, in fact did prove to have invaluable information and opinions regarding this research topic. Other designers were contacted through business connections or their design school association with their program chairs. This was a purposive sampling, interviewing 20 key industry

informants. Subjects were contacted via e-mail and asked for interviews. Appointments were made, and audio recordings of the interviews conducted by this researcher.

The Twin Cities region has three educational institutions offering apparel design courses in the Minneapolis-St. Paul area. They are identified as Institution 1, Institution 2, and Institution 3. The chair of the department at each institution, was interviewed and coded as E1, E2, and E3. In order to randomize the sample, each department chair was asked to supply the names and contact information of two recently graduated alumni from their respective educational institution, to be contacted for interviews. Recent fashion graduates have current experience and knowledge regarding finding work in the fashion industry around the Twin Cities. Alumni references are noted as A1, A2, A3, A4, A5, A6 in order to maintain anonymity.

To best represent fashion-related businesses, three market segments were specified. The first category represented large fashion industry entities. The second was medium sized fashion businesses, and the third was small entrepreneurial businesses. Key representatives from large companies' data were labeled as BB1 and BB2. Mid-sized fashion-related businesses data were labeled as MB1, and MB2. Smaller independent designers and fashion related SMEs' data were labeled as SB1 and SB2. Textile-related industry representatives were labeled as T1, T2, and T3. Minneapolis-St. Paul based apparel designers and designer-merchants, and fashion related businesses were coded as D1, and D2. Note that all alumni respondents were also independent designers, but are coded as alumni. Sample size is representative of a larger regional population, and results should be reliable.

Instrumentation

A new measurement instrument was developed specifically for this study. This instrument was a semi-structured interview platform with open-ended questions based on

naturalistic inquiry (Patton, 2015). The interview questions related directly to the research questions. Questions were posed in the same order so all interviewees had as nearly an identical experience as possible. This structured part of the interview was used to ensure data could be compared easily and precisely (Gall, Gall, & Borg, 2007). The interview platform is labeled Appendix A.

Reliability and validity. The interview platform was vetted for reliability and validity as described below.

Reliability. To ensure reliability of the interview questions, the researcher employed a peer review process as well as a pilot test to a convenience sample of academics and designers. After questions were formatted, the instrument was pre-tested by one representative of both the educators and design entrepreneur stakeholder groups, in order to be certain the questions were answerable and yielded usable results. Gall, Gall, and Borg (2007) suggest piloting the interview to detect bias, identify communication problems, and identify questions needing rephrasing or clarification. After running the pilot test, three questions were rephrased, and it was apparent there was a need for a list of definitions and their accompanying examples with linked websites. This information was added so respondents could see specific examples of the terminology. See Appendix B.

Validity. The specific data gained during this research project is not generalizable beyond the Twin Cities area and the subject under investigation. All instruments used in this study were developed specifically for this scenario. Data collected is also specific to the subjects interviewed and the research questions posed. Using an interpretive validity lens to view the data, Gall, Gall and Borg (2007), outline several ways to judge validity in qualitative studies.

They suggest evaluating data by usefulness, contextual completeness, triangulation, and outlier analysis among other factors.

Data Collection Procedures

The procedure was based on eliciting data from semi-structured interviews. There were three major groups of interviewees: fashion educators, working designers, retail and fashion related business representatives. Local fashion merchandising respondents represented business from large corporations, medium, and small companies. One trade organization representative and one non-profit interest group representative were interviewed as well. Local post-secondary educational department chairs for Fashion, Apparel and Merchandising departments were interviewed. As many local designers as possible were identified through fashion industry connections, and were asked for interviews.

Interviews for this study were key informant based, using a semi-standardized open-ended question format. Twin Cities' designers, merchants, and educators were interviewed in person or via telephone and recorded for transcription. Interviews were done solely by the investigator. Interview questions related to the state of apparel design, manufacturing, and the need for a FIC in the Twin Cities. Only the researcher knows the names and affiliations of the interviewees. Respondents were asked for their experiences in the Twin Cities fashion industry and for suggestions if they had knowledge of fashion incubators or fashion innovation centers.

All participants who responded to the researcher were asked for a personal interview. The location and time of the interview was suggested by the interviewee. Participants were given a copy of the implied consent document (Appendix C), a definition list Appendix B), as well as a copy of interview questions (Appendix A), well in advance of the interview. The consent form explained their identities would be kept anonymous and their responses were coded

so only the researcher knew their identity. Further, they were assured any identifying information would be deleted from all documentation. After any participant questions were answered, the recorder was turned on and the interview began using the same set of standardized open-ended questions. The final prompt was an open-ended question asking participants to discuss anything important that was related to a potential FIC but had not been previously addressed.

Participants were guaranteed anonymity and all data was labeled without identifying information. Session audio recordings were coded and securely stored on a password protected computer. Recordings were sent to a professional transcription service. All participants were sent a copy of their transcribed interviews to be able to make corrections or clarifications. Participants were promised a copy of the final study upon completion. Feedback was compiled to answer the research questions regarding the need for a fashion innovation in the Twin Cities region.

Data Analysis

The data from this study provided information regarding production and manufacturing issues local designers and businesses face and respondents opinions regarding the need for a FIC in the Twin Cities. Interviews were recorded, transcribed and session notes were reviewed using interpretational analysis methods. Gall, Gall, and Borg (2007) state that this type of analysis is helpful in finding constructs, themes, and patterns that help describe and parse out details in the issue being studied. After repeated readings of all transcripts, categories of responses became evident. Interview responses were coded according to theme and then categorized. After careful analysis of the data, conclusions were drawn based on the themes developed.

Limitations

The following are limitations of this study that were recognized by the researcher.

1. Limited timeframe for gathering data.
2. Issues contacting participants, scheduling conflicts and soliciting time from working subjects.
3. Data collected is not generalizable beyond the Twin Cities region.
4. Very limited existing scholarly research focused on fashion innovation centers or incubators
5. Several or all of these factors may have affected response rates.

Summary

This chapter outlined the methods and procedures used to answer the five research questions. It specified the subject selection, instrumentation, reliability, validity, data collection procedures, data analysis and limitations of the study. Interviews were conducted and analyzed by the researcher, using interpretational analysis methods. Major themes were teased out of subject responses as well as interview notes, and are represented in the analysis presented in chapter four.

Chapter IV: Results

The purpose of this study was to determine if there is a need for a fashion innovation center in the Minneapolis-St. Paul region. After conducting a series of 20 key informant interviews using a semi-standardized open-ended question format, a thematic interpretational analysis was done. First, each response was collected and categorized by question number, and secondly responses were split into three categories; educators, businesses, and designers. A secondary analysis was done to see if responses were influenced by their employment situation. All interview questions were formulated to answer the following five research questions:

1. To what extent would local stakeholders support a fashion innovation center?
2. What are the barriers to developing a fashion innovation center in the Twin Cities?
3. What are potential benefits of developing a fashion innovation center in the Twin Cities?
4. What types of partnerships are necessary to support a fashion innovation center?
5. What does a fashion innovation center look like if developed in the Twin Cities?

This chapter describes the thematic breakdown of the 10 question instrument as it applies to the five initial research questions. A summary table of themes is located at the end of the chapter.

Thematic Breakdowns Supporting Research Questions

This section ties responses from specific interview instrument questions to answer the five original research questions. Some research questions had only one question dedicated to them, while others had two or three interview questions targeting different elements relating to the research question.

Research question 1: To what extent would local stakeholders support a fashion innovation center? When broken down by answers to each research question, interview

questions that directly related to research question 1 are interview questions one and seven. Interview question one is the same as research question one, and interview question seven asked, how the trend toward slow fashion or small-batch artisanal fashion would be supportive of a local FIC? The following are thematic breakdowns of both interview questions one and seven.

Interview question 1-To what extent do you think the Twin Cities' fashion stakeholders would support a fashion innovation center? Responses to this question fell into two common themes. Theme-1 was that many respondents acknowledged the need for a FIC, but doubted that clients would financially support it or offer services in kind. This theme was not expressed by any one identified group of respondents (such as “educators”), but was reiterated by several respondents in all three categories of respondents. An experienced local designer expressed this theme like this, “The design community here is trained to take advantage of any and all attention that is offered, but not necessarily willing to share or contribute to keep that effort going.”

Theme-2 respondents enthusiastically supported the FIC concept, but wanted more structural details. A business respondent said,

We have quite a few growing fashion related companies here in the Twin Cities. The city of Minneapolis is interested in supporting a fashion innovative hub, as well, which is a huge indicator that there could be policy built around it, and there could be funding related to perhaps real estate or tax breaks that might drive some entrepreneurship. Plus, I think the economy is at a point where entrepreneurship is possible, and there's a real niche market for small batch manufacturing now. Stores and retailers are much more interested in hiring small design entrepreneurs doing small batch production.

Other individual comments ranged from, “I don't understand why this hasn't worked before”, to the statement that “support would depend upon who the stakeholders were.”

Interview question 7-How would the trend toward slow fashion or small-batch artisanal fashion be supportive of a local fashion innovation center? Three themes appear in response to this question. Theme-1 respondents concurred that Millennials and Gen Z's "seem willing and anxious to support local and legacy products." This first theme was expressed by two thirds of respondents. It represents acknowledgement of the growing trend towards small-batch artisanal design in both marketing and shopping. Theme-2 stated a desire for a FIC to educate the public about the value and quality of artisanal and sustainable design. Several local designers stated that "a fashion innovation center could help retrain the public to understand and appreciate sustainable practices and local design talent, and it could give the design community the recognition it needs." Theme-3 is expressed by a local retail representative who said,

Small innovative designers help drive new technologies and inspire bigger organizations. But people don't understand that small batch production requires as much or more expensive equipment as mass manufacturing. It's as much about finding and keeping knowledgeable staff who can use and maintain all the equipment that is difficult.

Research question 2:What are the barriers to developing a fashion innovation center in the Twin Cities? Interview question four addressed this research question directly. This question elicited four specific theme response types.

Interview question 4-What do you see as barriers to a fashion innovation center in the Twin Cities region? Theme-1 noted funding as the primary barrier. Theme-2 focused on the design industry being characterized as territorial. Theme-3 discussed attitudes around local design not being seen as fashionable or creative. Theme-4 describes up-and-coming designers as wanting the glamour associated with fashion design without wanting to, or being able to do the hard work of production necessary to carry it through. These four themes were evenly

distributed from respondent categories. Theme-1 identified the biggest barrier as “the lack of funding along with finding a smart strategic management team.” Theme-2, “territorialism” is best expressed by a local educator who said,

Traditionally it’s been a really secretive industry. People don’t share their resources. They don’t want to share their equipment or their stitchers or pattern makers...There’s a lot of competition. Finding a way to build a community is almost a bigger problem than finding the funding, facility, or the equipment.

Theme-3 is focused on “attitude.” This refers to several strongly held beliefs that Minnesota is not thought of as a fashion forward community. Part of this theme is expressed in the statement, “People in Minnesota are very practical and they want useful clothing that is going to last...and that doesn’t come from a fashion-centric sort of idea.” Another attitudinal barrier is that especially since the Project Runway design series aired, “everyone wants to be a designer, but nobody wants to do the work.” One seasoned and involved local designer stated it this way, “The industry is built on a lot of hard work...People get excited about the glamour of the runway and shows, but that’s just ‘playing dress-up.’ You should sell your work, or else it’s just a hobby and people in Minnesota have not come to believe that yet.” This same designer explained the failure of previous innovation centers by saying “there is a gap in our collective desire to make this happen.”

Research question 3: What are potential benefits of developing a fashion innovation center in the Twin Cities? This research question related to interview questions three and five. Question five directly referenced this question, and question three asked more specifically about economic indicators observed.

Interview question 3-What do you see as economic indicators showing potential in the local fashion market? Two main themes emerged from the responses. Theme-1 reflected the majority view that respondents noticed a large increase in designer “pop-up” shops as well as new designers appearing at art fairs and local markets. These respondents noted that local buying habits have become more “experiential.” For example, they noted new designers showing apparel lines at local microbreweries often accompanied by a band. Most business respondents, however, shared Theme-2 views, that pointed to their increased level of business engagement with local entrepreneurs. One respondent identified a 700% increase in local business over the past ten years, and several business respondents stated that the market was no longer simply local due to e-commerce, but that markets are now more national and international.

Interview question 5-What potential benefits do you foresee if a local fashion innovation center was developed? The themes running through the answers to this question were identified as: Theme-1 becoming an economic engine, Theme-2 capturing a resurgence in innovative design, and Theme-3 helping younger generations become part of a sharing economy. The responses were divided evenly for these three camps of thought. In Theme-1, several business experts felt that having an innovation center “could be an economic engine for the city and state,... able to create new business and entrepreneurship, and then also I would say [it could be] a needed talent pipeline for existing big businesses or growing small to medium-sized businesses.” A local designer reflected Theme-2 when they stated that “People in fashion leave Minnesota because they feel they’ve gotten too big and need more resources and better access to markets. They move to N.Y. or L.A. So having a center here would support and recognize talent here and keep them local.” Theme-3 was expressed by another designer seeing the need to

“start with [training] the young people, and they will continue to give back to the design community. They will help teach the next generation as they build something for themselves. The sharing economy is just starting to touch fashion.”

Research question 4: What types of partnerships are necessary to support a fashion innovation center in the Twin Cities? Three interview questions related to this research question. Interview question two inquires about likely users, question six about who or what the market for goods and services would be, and question nine reflects the research question directly.

Interview question 2-Who do you think would be the most likely users of a local fashion innovation center? Almost all respondents agreed upon the response to this question. Theme-1 identified the primary users as small design entrepreneurs, “up and coming designers, [some] with or without formal education – but all needing resources which they cannot afford.” In Theme-2, other respondents suggested a FIC could be used by experimental innovators or that it might bring about “a resurgence of existing designers having new creative projects...a second creative chapter.”

Interview question 6-Who or what do you think is the market for goods or services made in a fashion innovation center? This question had three basic themes emerge and responses were evenly distributed in the sample. Theme-1 was that small design entrepreneurs would become the primary market for experiential learning at an FIC. Theme-2 was that the market is open to any product with the prevalence of e-commerce, so there were a myriad of possible goods and services. Theme-3 was the primary market could be socially conscience consumers looking for more sustainable goods.

With Theme-1, respondents felt it would offer a great “opportunity to do test marketing, and [it] would be great to have a group of people who could test your clothing and do it in a safe environment so you could tweak it and make changes before you released it.”

Theme-2 stated that a FIC could be attractive to almost anyone because a huge range of possible users would supply a huge range of possible markets... “so it really depends on the products and services that are available, and figuring out the right way to set it up.” Theme-3 suggested that the market would predominantly be socially conscience consumers looking for locally produced sustainable goods. As one business respondent stated, “It will be attractive to students and post-graduate entrepreneurs from the local community who want the story behind the product.”

Interview question 9-What types of partnerships would be necessary or helpful to develop a fashion innovation center the way you envision it? Almost all Theme-1 respondents identified Target Corporation as a necessary partner. Theme-2 responses suggested partnerships with the Textile Center, local universities, the Craft Council, and economic advocacy groups from both cities. Theme-3 reflected mostly business responses that suggested partnerships with city policy and advocacy groups, the Chamber of Commerce, some strategic business partners, and local universities.

In Theme-1, 16 out of 20 respondents suggested Target Corporation be a key partner to any form of FIC development. As an example, one respondent said, “If Target was interested in getting behind something like this...well if Macy’s can do it, Target is bigger than Macy’s.” Another respondent said, “Target was an early partner in the Toronto Fashion Incubator, so why not here?” Theme-2 cited almost half of respondents suggested that partnerships with local colleges and universities, the Textile Center of Minnesota, the Craft Council and some form of local city economic development organization. This exchange represented these responses,

“engage all the schools here, the Textile Center, Craft Council and other bodies related to fabric, manufacturing, and sewing.” Theme-3 reflected several business respondents’ suggestion to gain support, “policy and advocacy from the city, the Chamber of Commerce, and some strategic business partners and schools.”

Research question 5: What does a fashion innovation center look like, if developed in the Twin Cities region? Interview question eight directly reflected this research question, and asked participants to share their opinions and ideas about how a FIC would be organized and structured.

Interview question 8-If a fashion innovation center could be developed in the Twin Cities, how do you see it being organized or structured? Two main themes emerged. The responses that led to development of Theme-1 were mainly suggested by larger business respondents and educators. Theme-1 states a venture like this requires a professional working board of directors, strategic managers, local and national business investors, foundation funders and cooperation with local educational and governmental organizations. Theme-2 responses were mostly expressed by individual design entrepreneurs who suggested keeping it small and without government influence so it would grow organically. This split in opinion regarding structure was directly related to employment status by category. As an example, a large business respondent offered the following statement,

[It’s] always important to have a working board that can oversee and contribute to areas such as marketing, finance, design and legal. Also, it’s important to have an executive director able to manage the design director (this person is invaluable when training designers to recreate their looks for production) as well as business mentors – those folks

who are able to coach designers in all areas of the business and how to sell to boutiques, etc.

Conversely, several independent designers expressed in Theme-2 that they preferred to have the organization run as a non-profit cooperative, without governmental input, or starting simply as a small business organization. This view suggested the FIC would grow with the success of individual mentees, essentially growing organically as the need developed. A key designer who set up a previous local designer mentoring organization, stated:

Start small, build something that is really exciting doing some cutting edge things, and then start growing a little bit so [you] let a few people in at a time, move into a new space, get people excited about that. Have an open-house, but I wouldn't be afraid to take it slow...take a couple of leaps as the need arose. I would build it from a business standpoint first and not a subsidized standpoint. It would be something where...if you want to be involved, you will spend the money. People would see the [other] people involved are operating at a certain frequency and then [those]who wanted in, maybe two people at a time or whatever, would figure out how to either get their business to that place, or perhaps there are classes offered on how to step up your game. I would just really focus on the business first and not try to make it for everybody.

Interview question 10-What additional questions or comments do you have about a fashion innovation center in the Twin Cities region? The final interview question was entirely open-ended and was intended to elicit creative ideas and personal stories that might add to the overall research. The responses to this question produced several key themes including: Theme-1, use a broader definition, Theme-2, most respondents wanted to be involved in whatever

iteration comes of this study, and Theme-3, a FIC should be centrally located and easily accessible.

Theme-1 stated that the name and concept of a fashion innovation center is too confining and should be broadened or perhaps substituted for a different title. Six respondents expressed views reflective of this sentiment, “I would question the words fashion and innovation, because is fashion really our lane? I’m not sure it is really about fashion...or is this about apparel, is it about technical apparel...Maybe it’s broader than apparel.” A similar point of view expressed it this way,

Just make sure it’s not too apparel-focused. I think there’s accessories, perhaps even home accessories, style based, softlines-based so you make it broader...it would be great to see local designers have access to be able to get their products off the ground and launch businesses. From a business perspective, to be able to tap into that talent on an affordable basis, to have somewhere to go, or...potentially even recruit from people who’ve been through there. Have it as a talent pool as well. Kind of a depository of knowledge, connections, expertise. I think that’s just a terrific initiative.

In Theme-2, almost all respondents were supportive of a FIC depending on how it was structured and functioned. Several respondents wanted to be involved with its creation, as suggested by this response:

On behalf of the ___ Innovation District and also ___, I think I can say that the ___ would like to be part of whatever would be formed. I think I would be really disappointed if something like this were created and we didn’t have a way into that discussion...We want to make sure we are serving our members and our artists and are always looking to build those bridges. And if it’s not us, then we would want to

participate. Maybe we would have a very strong involvement. Depending on how that would be formed...five years from now...in a new facility, we will have the ability to do much more on the fashion front. And if that incubator were in this neighborhood, or next to us, or part of what we do, that'd be great. We want to bring artists in that will serve our community, but will also draw people from around the country to come to the ___ to take classes.

Theme-3 is that the center must be centrally located and easily accessible to all. A key respondent explained:

Accessibility would be huge, especially with the Minnesota weather, I think. Public transport and connected by bridges to other buildings. There's a nice secure building downtown, but can I get there? Where will I park? Parking should be part of it too...because a lot of time we get these good buildings, but then it's a nightmare to figure out how to get there. [It must be] affordable for people to use.

To review a more concise thematic breakdown of interview questions 1-10, see Appendix D. These themes helped inform the conclusions to the five initial research questions. The final open-ended question allowed respondents the freedom to expound on the state of the industry, and their hopes for a FIC. Respondents' suggestions were often well beyond the scope of this study, but ultimately did round out the big picture in fuller detail.

Chapter V: Discussion, Conclusion and Recommendation

The purpose of this study was to determine if there is a need for a fashion innovation center in the Minneapolis-St. Paul region. In conducting this research and analyzing the resultant data, a larger picture of the issues, needs and desires of the local design community became more apparent to the author who has also worked in the apparel design industry since the 1980's.

There is a strongly expressed need within the creative community to have such an entity. However, there are specific issues that must be addressed if such an enterprise were to succeed. Simplistic answers to the question "why hasn't there been a successful incubator or innovation center in the Twin Cities previously?" has plagued local businesses, artisans and entrepreneurs.

To interested parties, the answer to that gnawing question seems to be - because there are too many competing interests for a small center, with too little funding, and too few leaders willing or able to put together and run a functioning design center of the scale and scope necessary to make it work on a sustainable level. The community leaders who have mounted previous efforts have often been designers themselves, who while having vision and knowledge, may not have had the organizational, financial backing, and business background to create a working center.

The following sections attempt to offer clarity from the data, and a working pathway towards creating a possible framework for a successful innovation center for the Twin Cities area and surrounding communities.

Restatement of the Problem

The Minneapolis-St. Paul region has a sizable population of apparel designers and legacy product lines, but lacks the infrastructure to support sustainably sized regional apparel manufacturing. Small local designers struggle to produce their lines because of a lack of skilled

workers and technical equipment. This causes talented designers to seek resources in New York or Los Angeles, eliminating the possibility of creating locally designed, sourced and manufactured goods.

Methods and Procedures

This needs assessment study used purposive sampling strategy to contact key informants. Several of these contacts recommended two additional informants who turned out to be invaluable resources. In total, 20 key industry informant interviews were conducted. The instrument used was a semi-structured, open-ended 10-question interview platform. All interview questions, attached protocol instruction, and key definitions were sent to the interviewee prior to the interview to insure focus and constructive use of respondents' time. All interviews were done by the researcher, and were recorded, coded for anonymity, transcribed and analyzed. The analysis was done using two methods. The first analysis was to organized by question number. The second analysis segmented respondents into three-category designations. The first category included local fashion design educator program chairs. The second category was local fashion related business representatives (small, medium, and large), and the third was local working designers. After reviewing the interview data repeatedly, a thematic analysis helped determine an overall picture of the answers to the five research questions.

Discussion

After multiple reviews of the data and field notes, the information garnered from local designers, apparel-related businesses and design educators was extremely important in developing conclusions about the five main research questions. Industry experts' opinions and personal experiences give varied and complex views of the fashion industry's desire for a FIC in

the Twin Cities. Using this researcher's analysis of the data, study findings are broken out to answer each of the five research questions.

Research question 1: To what extent would local stakeholders support a fashion innovation center? Initially there would be a great deal of support for an entity that would be a centralizing presence and resource intended to encourage development and innovation of softline products created in the Twin Cities area. This statement acknowledges that the research question was restrictive of the expressed needs of the local design community. The terminology itself, "fashion innovation center", was questioned and elicited several responses stating that the definition should be broadened and more inclusive. Broadening the definition would also potentially include more diverse users as well as larger potential partners, whose current businesses may be interested in supporting the local creative community in this type of venture.

Research question 2: What are the barriers to developing a fashion innovation center in the Twin Cities? Responses to this question highlight not only physical barriers in the industry, but psychological handicaps affecting the local region for the last two decades. The most common barrier mentioned was the financial limitations that come with starting up any type of new venture. However, there were two psychological barriers described as, territorialism and a lack of confidence in regional "fashionability."

Currently in the Twin Cities, creative entrepreneurs usually work alone or with only a few staff. They do not often share knowledge or equipment with others and can at times be territorial. There is no local industry-related mechanism for individual designers to communicate or collaborate with other designers or local businesses. Designers often feel they are working "in silos" as one respondent put it. Outside of one week of the year, known as MN Fashion Week,

local design entrepreneurs have little if any interaction with other designers. This isolation is not conducive to the current working trend of collaboration and creative team innovation.

Another psychological barrier is that many retail buyers, merchandising businesses, and some designers themselves do not see the Twin Cities community as “fashionable.” There currently is no merchandise market place where buyers can meet to see the scope of what local designers have to offer. New York, Los Angeles, and other cities have designated districts or areas, where buyers can meet with vendors, locate products and services, and in general connect with people in the design industries. The Hyatt Regency in downtown Minneapolis used to house dozens of apparel representatives’ offices where buyers went to source local product. This resource is no longer available.

Another perceived barrier is that young designers enjoy the glamorous aspects of fashion such as doing illustrations, choosing fabrications and showing designs at runway shows. However, many of these young entrepreneurs, when they find out how much work goes into manufacturing a product line, often lack the will to learn the skills necessary to do the work themselves, or to put together a qualified production team. Sewn product is extremely expensive to produce in small quantities, and much easier to outsource the time consuming and difficult jobs involved with having a production facility. The downsides are; increased expense, loss of control, and high minimum quantities required when outsourcing.

A key respondent, who previously created a fashion incubator-type organization in the Twin Cities, identified this lack of enthusiasm to manufacture locally and offered the adage “If a designer does not sell their work, they are simply the entertainment.” This statement is not only true, but is emblematic of the current state of the MN Fashion Week events that occur each spring in Minneapolis. Designers show their original samples, but rarely are able to manufacture

these garments. They often do not even have sales information available. In consequence, there are rarely professional buyers from the industry who attend these events. These fashion shows are often merely entertaining, with no purpose other than making the Minneapolis-St. Paul fashion community feel involved and creative. It is fun, but not economically sustainable.

Research question 3: What are potential benefits of developing a fashion innovation center in the Twin Cities? One obvious potential benefit is that a FIC could become an economic engine that drives more innovative production and design services in the region. It could attract new designers from both within and outside the region as well help keep local designers in the community. Another benefit that a FIC could have is to become a resource center to help not only build entrepreneurial businesses, but offer opportunities for small and large businesses to creatively collaborate with each other. Yet another potential benefit would be that it could become a centralized location for industrial institutional knowledge and connections to skills and equipment lacking in the region. This also means it could be a collective of resources for people to find contacts for design services such as screen-printing, or knitting machinery and fabric sources. A FIC could even help coordinate teaching programs between the three main educational institutions currently teaching fashion programs. Potentially, it might link more than one site as satellite extensions of learning. Following the example of the Textile Center of Minnesota, it could offer seminars, clinics and classes lead by industry specialists, and be a centralized meeting place for industry gatherings. All these possibilities exist, if a FIC were to be developed in the Twin Cities.

Research question 4: What types of partnerships are necessary to support a fashion innovation center? While almost every participant mentioned Target Corporation as a potential partner in an innovation center, there were also many other suggestions for collaboration. These

consisted of the Textile Center of Minnesota, the Craft Council, local business development organizations of both Minneapolis and St. Paul, and the three schools having design programs. One respondent noted that we are extraordinary lucky to have many Fortune 500 companies based in the Twin Cities, and suggested more than traditional fashion related companies might be interested in creative innovations that go beyond fashion. A local trade organization suggested contacting the Urban Manufacturing Alliance. Many respondents suggested a combination of government, large and small businesses, educational institutions and foundation funding sources. There are abundant potential resources in the region.

Research question 5: What does a fashion innovation center look like if developed in the Twin Cities? Both the businesses group and educational leaders were fairly consistent in suggesting that an entity such as this should be structured with a working board, a strategic manager, and experts to run the day-to-day working. Ties should be established with industry leaders, representatives from the three educational institutions, and dedicated experienced design industry people. This group of experts will be able to visualize an effective structure for such an organization. In initial conversations, many different types and levels of services were proposed. All respondents were open to suggestions, and several offered to house a potential FIC.

Local designers had the most varied responses to this question, which suggests a possible reason why previous iterations of an innovation center have failed. No two designers had the same needs or wants when it came to structuring a design center. Their responses varied greatly:

- It should be a small locally funded cooperative without any government interaction
- It should be a small start-up with self-sustaining business structure that grows organically with its successes.

- It should have a large stable funding source and could collaborate with the Textile Center, S.R. Harris and other sources for better access to raw materials.
- It should have one or two big corporate sponsors and be set up to train local sewers to make small production runs.
- It should be a non-profit collaborative space where designers can go for tutorials on equipment.
- It should have a large team organization, a trifecta...office and collaborative space, community workshops and classes, as well as mentorship and scholarship/grant opportunities.
- It should have sustaining memberships like shareholders, perhaps also an angel investor.
- It could be set up to make money.
- It should have professional paid employees with clear scheduled availability to rent equipment and expertise in working with the equipment.

In previous attempts to build an innovation entity, designers were responsible for setting it up and running it. The originator's vision may not have been the same as that in which other designers wanted to invest their time and energy. Most respondents felt that a center is much needed, however there is no consensus on how it should be structured or funded. Bringing together local entrepreneurial designers as a community could help build a more cohesive consensus of what a center should or could be. A more professional organizational structure may work better for all potential users.

Conclusions

From the gathered data, it can be concluded there is a strong need and support for some type of sewn product innovation center. However, after conducting the research, the answer to the question – Is there a need for a fashion innovation center in the Twin Cities? is yes, *and* it must be more than just *fashion* to be successful. In the process of conducting one-on-one interviews, strong connections developed with respondents allowing them to give unfiltered opinions since their responses would be anonymous. Some research questions opened topics that looked directly at the psyche of individuals in an industry known to be strongly ego driven. The creative arts community in the Twin Cities area is vibrant and generally well supported, however for some reason the fashion apparel and accessories industry has not been successful in drawing the types of collaboration and cooperation that build a well-established production presence in the region. Respondents' answers surfaced many possible reasons for this. There is no consensus on what such an entity should be. One business respondent openly questioned the premise of the needs assessment framework because, as this respondent pointed out, “are we really going to compete with New York and L.A. to be known as a center of ‘fashion’, is this our lane?”

Looking at the region's rich history in production of outerwear and underwear products, this appears to be a key problem. The Twin Cities region has been, and possibly could be again, strong in softlines production. However, our region will never compete with primary fashion cities, nor does it make sense to try. The Twin Cities must find a path of innovation that builds from the strengths of our roots. Our roots are based in practical and functional apparel. That does not mean Twin Cities' designers cannot be innovative or create businesses that are inspired

by fashion. It just means those companies will probably remain small artisanal companies that continue to inspire and energize the local design community having limited production capacity.

Product innovation fused with technology could potentially lead to larger-scale production in softlines products, but this will most likely be working with the medical industry, safety or technical fabrication industries. The Mayo Clinic, Medtronic, and 3M are only some of the locally based companies working in the growing medical industry sector. They could become partners in this type of new product innovation. For example, products could be engineered for use within the human body. Already there is a large increase in wearable technology that could become the basis for much more innovation. This requires the use of highly technical materials and product design engineering. These products could be the industry in which Midwestern ingenuity, engineering and creativity excel.

By looking at the strengths of the three local educational institutions with apparel programs, it is possible to see their individual program strengths linked as satellite training facilities to an innovation center. One specializing in wearable and advance technologies in research, while a second specializes in having a full suite of industrial softlines manufacturing equipment and CAD experience. The third specializes in sustainable design practices, working with diverse populations to help raise quality of life through learning and leadership. The larger concept is to have a central corridor or innovation district surrounding a main facility that could bring the whole design community together in flexible new ways.

If the definitional framework of a FIC is altered by suggesting the innovation center is not necessarily focused specifically on fashion or apparel, but sewn product, the answers to each question take on new meaning for what an innovation center could be.

Research question 1: To what extent would local stakeholders support an innovation center? Based on the research, it can be concluded that if the definition of the innovation center includes many types of products, the answer to this question is unequivocal. There is great potential support for an innovation center in the Twin Cities.

Research question 2: What are the barriers to developing an innovation center in the Twin Cities? Based on the research, it can be concluded that the major barriers are determining the proper format, organizational structure and services that should be offered, finding funding sources, and finding experienced staff. Also communicating the mission and potential uses of such a center will be important to getting the equipment and expertise to be able to function.

Research question 3: What are potential benefits of developing an innovation center in the Twin Cities? Based on the research, the potential benefits are that it could encourage additional economic development and spur industrial design production that would, in turn, help support the smaller artisanal design mission. Interaction between large corporate users and smaller entrepreneurs can lead to interesting cross-pollination of ideas and new collaborations. It may draw more innovative creatives to the area and help stem the flow of local designers leaving to go to New York or Los Angeles for market accessibility. It may connect local designers, entrepreneurs and businesses in a way that has not been done in the past, and lead to more collaboration and cooperation to help build many local industries.

Research question 4: What types of partnerships are necessary to support an innovation center? Based on the research, support should come from several large corporations such as Target, 3M, Medtronic, and the Mayo System, as well as smaller local businesses and potential users. There should also be support from local government economic agencies, the

Chamber of Commerce, trade associations, the Urban Manufacturing Alliance, all three local colleges and universities, the Textile Center of Minnesota, foundation funders and local design entrepreneurs. It would also be important to have local equipment vendors, material vendors, and business executives committed to lend their knowledge, connections and mentoring expertise.

Research question 5: What does an innovation center look like if developed in the Twin Cities? Based on the research, this format is yet to be determined. An innovation center could be attached to an entity like the Textile Center of Minnesota, which is centrally located between Minneapolis and St. Paul, it already exists in a designated innovation district, is easily accessible by light rail, is open to the possibility of including a sewn product innovation space within the Center because it fits the Textile Center's mission. All three schools are equidistant to the Textile Center and could become satellite locations in association with the program. Large corporations could donate equipment and schedule training time in exchange for access to creative thinking, concepting with young entrepreneurs, and perhaps prototype development. The sewn products developed could be tested or used as entry-level production sewing for a small but agile sample room. A small scale production site could even help pay the center's expenses eventually, and at the same time offer industrial sewing training at its satellite educational facility off-site at one of the local design schools which has existing equipment.

An innovation center like this should be based on the interaction of both large and small users who would support it in differing ways. Large corporate users may encourage employees to use the center to experiment with their personal projects, or may want to try running small batch research product runs. Smaller users may want the center to help develop business plans to guide the growth of their business concept. Other designers will come for the use of specialized

manufacturing equipment or CAD/CAM demonstrations. Perhaps it houses monthly meetings of specialized groups just as the Textile Center currently hosts differing groups within the needle-trade.

Educational symposiums, conferences, seminars, and classes could be offered in many areas of softlines development, production, and marketing. There must be a balance where larger corporate sponsors help stabilize funding so smaller entrepreneurs can afford to use the center's services, while also offering business enterprises access to innovative thinking and possible collaboration with smaller companies to the advantage of both. The goal could be that the center will eventually be self-sustaining by corporate and individual memberships.

In the following Figure 1 Findings of Research Questions, the answers to the five research questions are stated more concisely. Note that the identifier "fashion" has been replaced with the term "sewn product", from the original research questions in acknowledgement of respondents' suggestions to broaden the concept of this entity. This venture may not end up being called an "innovation center" either, but for the purpose of this study, will continue to be identified with that moniker.

1-To what extent would local stakeholders support a sewn product innovation center?

- There is great potential support *if* the center is more than just fashion & apparel-based.

2-What are the barriers to developing a sewn product innovation center in the Twin Cities?

- Finding the proper format & services, gaining funding, and gathering experienced staff.

3-What are potential benefits of developing a sewn product innovation center in the Twin Cities?

- It could encourage economic development & spur industrial design production, which could in turn, support small local artisanal designers. Interaction between small & large users is key.

4-What types of partnerships are necessary to support a sewn product innovation center?

- Several large corporations, medium, and small businesses, universities, local government economic agencies, foundation funders, Craft Council, and the Textile Center of Minnesota, Chamber of Commerce, and Trade Associations

5-What does a sewn product innovation center look like if developed in the Twin Cities?

- The proper structure is yet to be determined, and requires more research.
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Figure 1. Findings of research questions.

Recommendations

The purpose of this study was to determine if there was a need for a fashion innovation center in the Twin Cities region. Over the past 25 years, three concerted attempts were made to develop various fashion alliances, collectives and incubator type structures, but have not been successful. The lack of a centralized resource center has left entrepreneurs, small, medium, and large local businesses unable to connect and collaborate. The data in this study shows there is support and a need for this type of center in the Minneapolis-St. Paul region. However, in order to help smaller artisanal designers build their businesses, an entity like an innovation center should attempt to underpin its structure by collaborating with strong regional companies such as

the Mayo Clinic, Medtronic, and 3M as well as apparel companies such as the Target Corporation. New categories of products could be conceived and prototyped at the innovation center. These products will probably be more functionally related to the healthcare and wellness industries rather than fashion. Fashion will probably not be the dominant form of sewn product made in the Twin Cities, but a strong foundation in functional sewn product, could support the growth and development of local sustainable and regionally designed fashion products in a synergistic way. Pursuing functional innovative sewn-product design is one way to support the small regional fashion-related design that local fashion entrepreneurs' desire.

Recommendations Related to Developing an Innovation Center

Further study must be done to determine what the most effective platform of operation would be if this entity could be established. More specifically, the following recommendations will help determine what should be done if actually planning an innovation center.

- Broaden the definition of an innovation center by omitting the word “fashion” or create an entirely new name.
- The center should be professionally structured with a working board, executive director, and strong management team. Close ties to community resources and expertise is imperative. A balance of large corporate funders and small entrepreneurial members is important.
- Do further research on other incubators and innovation centers as potential models.
- Innovative technologies and industrial equipment must be the backbone driving creativity, to lead to more efficient manufacturing and design processes.
- The innovation center should partner with a neutral but supportive entity having close affiliation with the trade. The Textile Center of Minnesota is a natural ally and an

innovation center could function in tandem and complement this organization. It is also centrally located, equally accessible to both cities by mass transit, and located in an established innovation district. All three higher educational institutions are equidistant from the Textile Center as well.

- Collaborate with both traditional and other non-apparel-related businesses that might bring new energy and creativity to functional design thinking. Look to the strengths of the region with medical and industrial design sources. Think about wearable technologies, the medical industry, safety products and other potential users, and how these might be a source of innovation for production development.
- Strengthen local design community communication by offering educational gatherings, cultural events, and collaborative opportunities for creative design thinkers to meet and share ideas.

Recommendations for Further Study

The following are recommendations for further study.

- Business incubation studies are abundant, but there are very few studies focused specifically on fashion incubators, fashion alliances, and other variations of fashion innovation centers. Targeted research should be done regarding innovation centers in similar sized markets their structure, funding mechanisms and efficacy.
- Specific to this study, research should be done on potential funding formats, structure of such a center, and the proper personnel to head up such an enterprise. The innovation format suggested in the conclusion section is an amalgam of structures, not related to any currently existing center, but is worth investigating.

- All recommendations must be evaluated for feasibility and be professionally vetted to ensure a reasonable chance of success before attempting to launch a center of this magnitude.

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Appendix A: Interview Protocol

Date: _____

Interview Subject Code: _____

Title: A Needs Assessment for a Fashion Innovation Center in the Minneapolis-St. Paul Region

Interview Questions:

1. To what extent do you think the Twin Cities' fashion stakeholders would support a fashion innovation center?
2. Who do you think would be the most likely users of a local fashion innovation center?
3. What do you see as economic indicators showing potential in the local fashion market?
4. What do you see as barriers to a fashion innovation center in the Twin Cities region?
5. What potential benefits do you foresee if a local fashion innovation center was developed?
6. Who/what do you think is the market for goods or services made in a fashion innovation center?
7. How would the trend toward slow fashion or small-batch artisanal fashion be supportive of a local fashion innovation center?
8. If a fashion innovation center could be developed in the Twin Cities, how do you see it being organized/structured?
9. What types of partnerships would be necessary/helpful to develop a fashion innovation center the way you envision it?
10. What additional questions or comments do you have about a fashion innovation center in the Twin Cities region?

Appendix B: Definition of Terms

Definition of terms from the interviewer:

Fashion Innovation Center or Fashion Incubator: A location offering shared workspaces, specialized equipment, business resources, and industry experts on staff who help education and support designers needing experienced assistance to improve or create and launch their own design businesses. These centers may be private or publicly funded and offer various levels of support and funding structures. The emphasis is on sharing knowledge, resources, and stimulating innovation and competitiveness in a nurturing environment.

Examples: Toronto Fashion Incubator, <http://www.fashionincubator.com>

Chicago Fashion Incubator at Macy's on State Street, <https://www.chicagofashionincubator.org>

Nashville Fashion Alliance, <https://www.nashvillefashionalliance.com>

Slow Fashion: Slow fashion begins with intentional designing, producing and consuming of fashion-related products in a sustainable and ethical way by slowing down the fashion cycle and moving from a quantity to a quality-based consumer mindset. A major goal is producing locally with as much local material and workers as possible. This small-batch or artisanal-based manufacturing is generally considered very ecologically sustainable.

Examples: Amour Vert, <https://amourvert.com>

RÊve En Vert, <https://reve-en-vert.com>

Hackwith Design House, <https://hackwithdesignhouse.com/about/our-mission>

Appendix C: Implied Consent Form

Date: _____

Dear Participant,

You are receiving this because you agreed to be interviewed regarding a thesis paper I am writing titled “**A Needs Assessment for a Fashion Innovation Center in the Minneapolis-St. Paul region.**” This study aims to determine if local stakeholders would support a fashion innovation center. We will discuss issues surrounding fashion design, apparel manufacturing, and entrepreneurship within the Twin Cities metropolitan area. I would like to know what your most pressing problems, interests, and expectations are for the immediate future of the local fashion industry, as well as any ideas you have to improve the local fashion business environment.

You were contacted as a potential subject in this study because your name is associated with the fashion industry in the Twin Cities. The goal is to get the viewpoints of a representative cross-section of designers, manufacturers, retail businesses, suppliers, fashion educators, and recent fashion school graduates.

Your participation in this interview is voluntary, and will be considered implied consent. Your identity will be strictly confidential and will be known only by myself. Any reference to you will be encoded and kept on a password-protected computer. The interview consists of 10 questions and should take no more than 30 minutes. If you decide to participate there is no compensation, and you may discontinue the interview at any time.

All information gained from these interviews will be used to write a thesis paper trying to determine if a fashion innovation center is needed in the Twin Cities region. I will send you a transcribed and redacted copy of your interview for your review. If I do not hear back from you after a week, it will be considered approved. Should you have any questions, please ask. If you have questions after the interview, contact me at your convenience. Thank you for your time and participation.

Sincerely,

Carol Mager

St. Catherine University

2004 Randolph Avenue, St. Paul MN

E-mail: clmager@stkate.edu

Phone: 651-261-8108

Appendix D: Thematic Summary

Interview Questions

Question 1-To what extent do you think the Twin Cities' fashion stakeholders would support a fashion innovation center?

1-Most agree a FIC is needed and would have many clients, however several respondents doubt that many of these clients would give ongoing support, either financially or with services in kind

2-Responders enthusiastically supportive of the concept but want structural details

Question 2-Who do you think would be the most likely users of a local fashion innovation center?

1-Most responders identify small entrepreneurial designers as primary users

2-FIC will be used by experimental innovators and give existing designers a second creative kick-start

Question 3-What do you see as economic indicators showing potential in the local fashion market?

1-Large increase in local designers showing at pop-ups and regional art fairs and shows

2-Business respondents noted increased levels of engagement with entrepreneurs trying to start new ventures

Question 4-What do you see as barriers to a fashion innovation center in the Twin Cities region?

1-Lack of funding

2-Territorialism, not sharing or cooperating

3-Attitude, not seeing the region as fashionable or creative in apparel design

4-Wanting the glamour surrounding design, but not willing to do the hard work of production

Question 5-What potential benefits do you foresee if a local fashion innovation center was developed?

1-It could be an economic engine to build the local and state economy

2-It could spur a resurgence of innovative design and manufacturing locally

3-It may help train younger design generation to work collaboratively taking advantage of the sharing economy, and improving cross business cooperation

Question 6-Who or what do you think is the market for goods or services made in a fashion innovation center?

- 1-Small design entrepreneurs are primary market for experiential learning at a FIC
- 2-The market is open to any product or service with e-commerce, so it depends on the products or services offered
- 3-Primary market is socially conscience consumers looking for more sustainable locally made products

Question 7-How would the trend toward show fashion or small-batch artisanal fashion be supportive of a local fashion innovation center?

- 1-Data shows Millennial and following generations are willing to pay more for local artisanal and legacy products
- 2-A FIC could help educate the public by promoting the value and quality of small batch artisanal and sustainable design
- 3-Small innovative designers drive new technologies and inspire bigger organizations- but ultimately cost more to produce as well

Question 8-If a fashion innovation center could be developed in the Twin Cities, how do you see it being organized or structured?

- 1-Professionally structured with a Board, Executive Director, strategic managers, local business investors and foundation funders, along with educational institutions
- 2-Keep it small and without government intervention. Grow it organically as funding builds.

Question 9-What types of partnerships would be necessary or helpful to develop a fashion innovation center the way you envision it?

- 1-Majority of responders stated the need to partner with Target Corporation
- 2-Other key potential partners are the Textile Center, local schools and universities, the Craft Council, and local economic development organizations
- 3-Businesses suggested partnering with the policy and advocacy groups from the cities, the Chamber of Commerce, some strategic business partners and the local universities

Question 10-What additional questions or comments do you have about a fashion innovation center in the Twin Cities region?

- 1-The name & definition must be broadened to include more than apparel or fashion
 - 2-Many responders want to be included in its development and offered assistance
 - 3-A fashion innovation center must be located centrally and easily accessible to all
-