

Presented by The Quilting Company brands: Fons & Porter, McCall's Quilting, Quilters Newsletter, Quiltmaker, and Quilting Arts in cooperation with Quilts, Inc., producers of International Quilt Market & International Quilt Festival.

# Quilting in America™ 2017

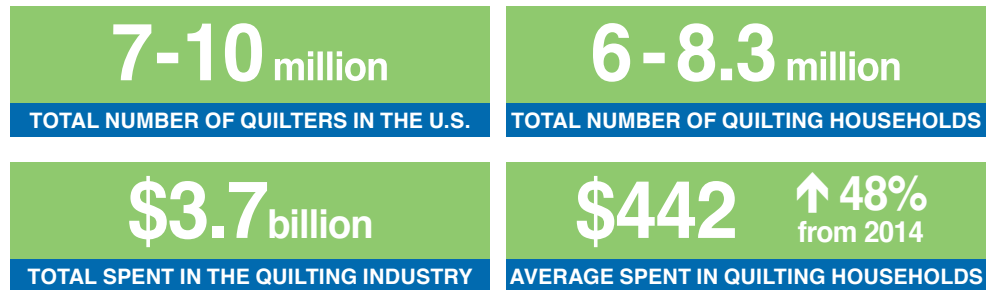
## Research Objectives and Methodology

Quilting in America™ 2017 is the eighth in a series of studies done since 1994 with the intent of measuring the amount of time and money quilters spend on their hobby, in addition to profiling the key segments of the market.

The study is conducted in two phases: Phase I, administered by ORC International in January 2017, involved surveying an online, national panel of households to measure incidence of participation and the dollar value of the quilting industry. When 6,105 completed surveys were received, ORC closed the survey for tabulation. This information, along with new sources of market data that were not previously available, were used to present the 2017 findings.

Phase II was conducted by Advantage Research, Inc. in April and May 2017. Survey invitations were sent to a total of 415,104 quilters over a period of several weeks. The invitees consisted of customers from APQS, The Quilting Company, Hobbs Batting, Northcott Fabrics, Quilting Treasures, and Quilts, Inc. When the survey closed, a total of 21,347 completed surveys had been received, yielding a response rate of 5.1%.

## SIZE OF U.S. QUILTING MARKET



## DEDICATED QUILTERS

- Defined as those households who spend more than \$500 per year on quilting-related purchases.
- They represent 16.4% of all quilting households, and account for 72.2% of total industry expenditures.
- In 2017, dedicated quilters report spending an estimated \$2.4 billion to \$2.6 billion.

## WHO IS THE DEDICATED QUILTER?

- Female
- 63 years old
- Well educated (70% attended college)
- Affluent (\$95,900 household income)
- Quilting for an average of 19 years
- Spends on average \$3,363 per year on quilting
- Quilting style(s): 85% prefer traditional quilting, 20% art quilting, and 37% modern quilting

All Quilters	Percent	Years Quilting	Hours/Week	Age
<b>beginner</b>	<b>10%</b>	<b>6.1</b>	<b>6.9</b>	<b>60.9</b>
<b>intermediate</b>	<b>59%</b>	<b>16.8</b>	<b>11.7</b>	<b>63.2</b>
<b>advanced</b>	<b>31%</b>	<b>26.6</b>	<b>17.6</b>	<b>63.4</b>

## U.S. QUILTING MARKET VALUE (\$ billions)



## THE DEDICATED QUILTER

### Buying Habits

#### FABRIC

- In the past 12 months, the Dedicated Quilter purchased an average of 99 yards of fabric at a cost of \$925 (\$9.34 average price per yard).
- 94% plan to purchase fabric in the next 12 months.
- Favorite types: Batiks (72%); Small Floral Prints (65%); Holiday Prints (64%); Print Solids/ Blenders, etc. (64%); and Tone-on-Tone Neutrals (58%).

#### THREAD AND BATTING

- The majority of Dedicated Quilters plan to purchase thread in the next 12 months.
- 83% will purchase 100% cotton thread, up from 79% in 2014. Fewer, 44%, plan to purchase a poly/cotton blend of thread; 30% plan to purchase polyester thread. 15% plan to purchase pre-wound bobbin thread, up from 9% in 2014.
- Over half, 54%, purchase batting in queen form, while 43% purchase in rolls. 66% are most likely to have purchased natural cotton, 55% cotton/ poly blend.

#### BOOKS AND MAGAZINES

- Dedicated Quilters have spent an average of \$136 on books, magazines, and DVDs in the past 12 months.
- They read an average of 3.4 magazines regularly and spend an average of 6 hours a month reading quilting-related magazines.
- The top reasons they read magazines is to learn new tips and techniques (88%), get quiltmaking inspiration (75%), find out about quilting products (63%), look at photos of quilts (62%), and find block patterns (60%).
- A large percentage of Dedicated Quilters, 85%, obtain information and/or inspiration about quiltmaking from magazines.

#### SEWING MACHINES

- 95% own a sewing machine, up slightly from 2014.
- 86% own a traditional machine; 45% own a serger; 18% own a longarm; 14% own a midarm. Those owning a longarm machine are up from 11% in 2014.
- In the past 12 months, 26% purchased a new traditional sewing machine for an average price of \$2,212.
- 9% plan to purchase a sewing machine in the next 12 months.

## The Under-45 Quilter

The 2017 study reveals some important observations of a younger group of quilters, those under 45, who are more likely to be an occasional quilter with less commitment to the craft, largely based on time and work constraints. We believe this to be an important group:

- Educated (4-year college graduate 35%; post-graduate degree 23%).
- Affluent (\$98,000 average household income).
- More likely to be an occasional quilter, but they still devote on average 10 hours a week to quilting, vs. 13 for the total sample, which is substantial given the other demands on their time. And this group is twice as likely to be employed full-time while devoting this time to her craft.
- Though more likely to be beginners, this age group is not entirely a "newbie" group since the percentage of Intermediates is on par with the total sample.
- 26% have purchased a traditional sewing machine and 26% attended a quilt show in the past year, suggesting a growing commitment to quilting.
- Modern quilting is much more prevalent in this age group.
- In general they spend less but only by 10% and that is largely driven by lower spending on machines and equipment.
- Websites (75%) and online video (63%) play a stronger role for information and inspiration than the total sample.
- Facebook, Instagram, and Pinterest are important sources for this group.
- In addition to internet search and social media, blogs are also important to this group.

## Internet and Social Media

### SHOPPING TRENDS

97% of Dedicated Quilters are purchasing fabric, batting, and/or thread in person, mostly at retail locations. Still, two-thirds of Dedicated Quilters (68%) are purchasing items online.

### FAN CLUB

Dedicated Quilters are learning about websites through Google searches, friends or relatives, and 50% are using social media sites like Facebook or Pinterest, up from 14% in 2014.

### INSPIRATION

Quilting-related websites were cited as good sources by 64% of dedicated quilters, up from 28% in 2014. And 52% turn to online classes and videos about quiltmaking, up from 30% in 2014.

### SURFING

Dedicated Quilters spend 7.9 hours weekly on the internet browsing, visiting, or interacting with quilting-related sites, which is a significant increase from 2.5 hours in 2014.