

QUILTING IN AMERICA™ 2014

Research Objectives & Methodology

Quilting in America™ 2014 is the seventh 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 TNS Global, Inc., surveys 93,000 U.S. households to measure incidence of participation and the dollar value of the quilting industry. When 7,500 completed surveys were received, TNS closed the survey for tabulation.

Phase II, conducted by DP Research Solutions, surveys in-depth 2,763 qualified “dedicated” quilters to learn more about them, their quilting habits and buying behaviors. This phase reported a 57% response rate in 2014.

Quilting in America™ 2014 Detailed Report

An extensive report providing detailed narrative, charts and data is available at ShopFonsandPorter.com/QIA

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Size of U.S. Quilting Market

- 10.3% of U.S. households (12.62 million) are home to at least one active quilter
- Total quilters in the U.S. is 16.4 million
- Quilting households spent an average of \$298 in 2014 up 36% from 2010
- **Estimated total dollar value of the quilting industry stands at \$3.76 billion.**

Dedicated Quilters

Defined as those households that spend more than \$500 per year on quilting-related purchases.

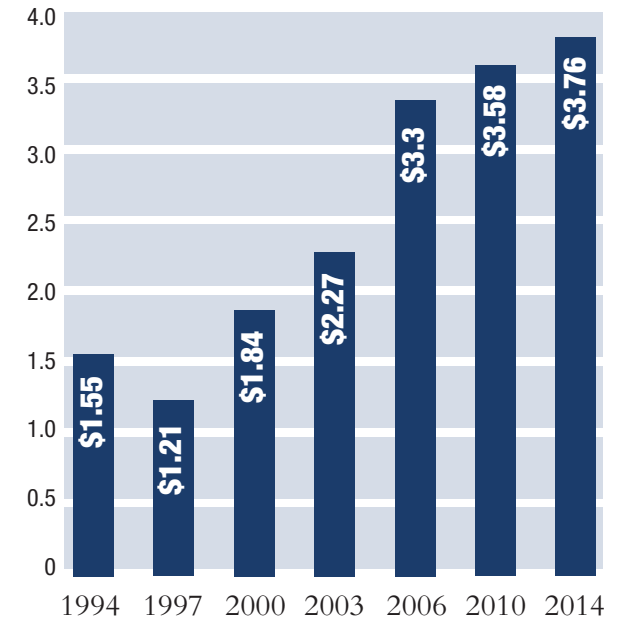
- They represent 12.2% of all quilting households, and account for 60.4% of total industry expenditures
- In 2014, dedicated quilters report spending a total of nearly \$2.27 billion

Who is the Dedicated Quilter...

- Female
- 64 years old
- Well educated (79% attended college)
- Affluent (\$101,080 household income)
- Quilting for an average of 20.3 years
- Spent on average \$3,296 per year on quilting
- Quilting style(s): 81% prefer traditional quilting, 38% art quilting, and 35% modern quilting

	ALL QUILTERS	BEGINNER	INTERMEDIATE	ADVANCED
PERCENT		9%	50%	41%
YEARS QUILTING		6.9	17.4	26.2
HRS/WEEK		5.1	8.2	13.8
AGE		64.1	65.1	65.1

\$ VALUE OF TOTAL U.S. QUILTING MARKET (IN BILLIONS)



Year	Total Quilters in U.S.
1994	15.50 M
1997	13.84 M
2000	19.76 M
2003	21.31 M
2006	27.00 M
2010	21.30 M
2014	16.41 M

From the Quilting in America™ 2014 Survey presented by F+W, A Content + eCommerce Company

Her Quilting “Stuff”...

- The majority (88%) have a room dedicated to sewing/quilting activities
- On average, she has \$12,861 of quilting tools and supplies
- On average, she owns \$5,939 worth of fabric

Sewing Machines

- She owns an average of 3.1 sewing machines
- 30% own more than 4 machines
- In the past 12 months, 27% purchased a new machine, spending \$2,504

Fabric

- In the past 12 months, each purchased an average of 99.9 yards of fabric at a cost of \$1173 (*\$11.74 average price per yard*)
- **Favorite types:** Batiks (60%) • Small-scale Florals (51%) • Reproduction Prints (25%) • Minky (16%)
- **Color Schemes most often purchased:** Jewel Tones (68%) • Bright Colors (63%) • Earth Tones (58%) • Neutrals (45%) • Pastels (40%)

Thread

- In the past 12 months, each spent an average of \$158 on thread
- On average, she owns \$803 worth of thread and has an average of 189 spools of thread in her collection (*\$4.24 average price per spool*)
- **Color Schemes most often purchased:** Neutrals (77%) • White (55%) • Earth Tones (52%) • Black (50%) • Jewel Tones (40%)

Books

- Bought an average of 3.6 quilting books for last 12 months with an average price of \$20.40 per book
- **Favorite places to buy books:** Online retailers (35%) • Quilt shops (24%) • Sewing specialty chain (16%) • Quilt show/event (8%)

Magazines

- Subscribe to or read an average of 3.7 quilting magazines
- Spend an average of 4.8 hours reading quilting magazines each month
- **Primary reasons offered for reading quilting magazines:** Learn new tips and techniques • Get quiltmaking inspiration • Learn about new products

Internet

- 87% own a tablet or ebook reader
- 86% access the Internet daily
- 53% learned of the sites they visit regularly through print/digital magazines
- 3 hours spent per week browsing, visiting, or interacting with quilting related sites
- 3.5 hours spent per week watching quiltmaking online broadcasting
- **Primary reasons for visiting quilting websites:** Quiltmaking inspiration • Learn new tips and techniques • Get free quilt patterns • Purchase/search for new fabrics • Purchase/search for quilting tools, equipment, and supplies

Key Findings 2014

- The estimated value of the quilting market in 2014 is \$3.76 billion (*up 5% since 2010*)
- Total number of quilters in the U.S. is 16.4 million (*down 23% from 2010*)
- Average quilting household annual expenditure is up 36% to \$298
- 12.2% of quilting households are considered “dedicated,” responsible for generating 60% of quilt industry spending (*\$2.27 billion*)