

QUILTING IN AMERICA™ 2006

Presented by Quilter's Newsletter Magazine, a ckMedia publication, and International Quilt Market & Festival, divisions of Quilts, Inc.

Research Objective and Methodology

Quilting in America™ surveys have been conducted every three years since 1994 with the intent to measure the amount of time and money quilters spend on their hobby and profile key market segments.

The study is conducted in two phases: Phase I, administered by NFO Research, Inc., surveys 40,000 U.S. households to measure the size and dollar value of the quilting industry. This phase reports a 65% response rate.

Phase II, conducted by DP Research Solutions, surveys in-depth, 2,500 qualified dedicated quilters to learn more about them, their quilting habits and buying behaviors. This phase reports a 70.2% response rate.

Size of U.S. Quilting Market

- 17% (19.135 million) of U.S. households reporting quilting participation.
- Total quilters in the U.S. now exceed 27 million, which represents almost a 100% increase from the 14 million quilters reported in 1997.
- With each quilting household spending an average of \$172.29, the estimated total dollar value of the quilting industry stands at \$3.3 billion.

Dedicated Quilters =

Individuals that spend more than \$600 per year on quilting-related purchases.

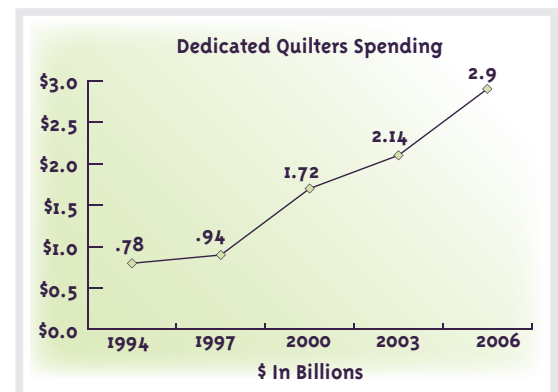
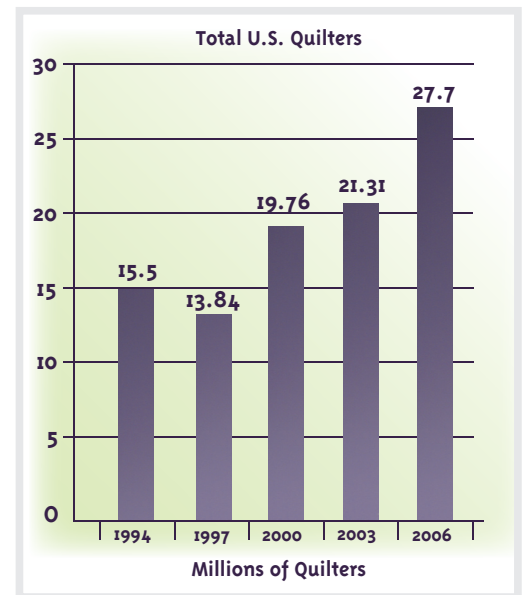
- They represent 4.7% of all quilters, yet account for 88% of total industry expenditures.
- In the 2006 report spending a total of 2.89 billion, an increase of 34.6% from 2003

Who is the Dedicated Quilter...

- Female
- 59 years old
- Well educated (72% attended college)
- Affluent (\$87,026 HH income)
- Spend on average \$2,304 per year on quilting
- Quilting for an average of 13.5 years
- **Quilting style** • 45% prefer traditional quilts
• 49% enjoy both traditional and contemporary styles

Her Skill Level

	Beginner	Intermediate	Advanced
Percent	8%	57%	34%
Yrs Quilting	4.5	11.8	18.3
Hrs/Month	22	39	65
Age	57.8	59.4	59.1





Her Quilting "Stuff"...

- The majority (83%) have a room dedicated to sewing/quilting activities.
- On average, they have \$6,517 of quilting tools and supplies. • On average, they own \$3,195 worth of fabric.

Sewing Machines

- They own an average of 2.6 sewing machines. • 23% own more than 4 machines.
- In the past 12 months, 28% purchased a new machine spending \$2,145 on the machine and an additional \$177 on accessories.

Fabric

- In the past 12 months, each purchased an average of 98.7 yards of fabric at a cost of \$816.60 (which equated to \$8.27 average price per yard).
- **Favorite Patterns** • Small-scale florals (73%) • Tone-on-tone neutrals (63%) • Batiks (62%) • Holiday prints (60%)
- **Color Schemes most often purchased** • Jewel tones (37%) • Bright colors (31%) • Pastels (21%) • Earth tones (21%)

Books

- Bought an average of 5 quilting books over last 12 months with an average price of \$21.50 per book.
- **Favorite places to buy books** • Quilt shops (53%) • Fabric stores (30%) • Online (26%) • Mail order (19%)

Magazines

- Subscribe or read an average of 4.2 quilting magazines.
- Spend an average of 5.1 hours reading quilting magazines each month.
- **Primary reasons offered for reading quilting magazines:**
 - Learn new tips and techniques
 - Get quilting inspiration
 - Learn about new products

Internet

- Majority (89%) own a personal computer
- 73% have high speed internet access
- 75% accessed the internet in the last 30 days
- 73% visited quilting specific sites
- Average 2.2 hours per week on quilting websites
- **Primary reasons for visiting quilting websites:**
 - Get free quilt patterns
 - Learn about quilting products
 - Shop for quilting supplies
 - Find block patterns
 - Search for fabrics

Key Findings 2006

- Number of quilters in the U.S. has grown by 6.3 million in the past 3 years to 27.7 million.
- Total U.S. quilting industry has grown by 35.5% in the past 3 years to \$3.3 billion.
- Dedicated quilter market has grown by 34.6% in the past 3 years to \$2.89 billion.
- 4.7% of all quilters—Dedicated Quilters—account for 88% of total quilting industry expenditures.
- 230% increase in non-dedicated spending.

Quilting in America™ 2006 Detailed Report

An extensive report providing detailed narrative, charts and data will be available in December 2006.

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