

Today's Quilting Trends

A Summary of the Quilter's Survey 2022 funded by Premier Needle Arts

Data for the Quilter's Survey was collected February 2022. Over 1 million quilters were invited to participate via email through 5 leading brands, with over 26,000 responses and 20 million data points. 92% are from the U.S., 6% from Canada, and 2% from other countries.



Who is the Quilter?

She is:

- Female
- In her 60's
- Retired
- With household income \$65k+
- 17.5% have a full-time job
- Comfortable with tech
- She's been quilting for over 10 years
- She starts 10 to 12 quilt projects a year, mostly Lap or Queen size, in a traditional style
- She spends more than 6 hours a week working on projects



Three factors that drive where she shops:

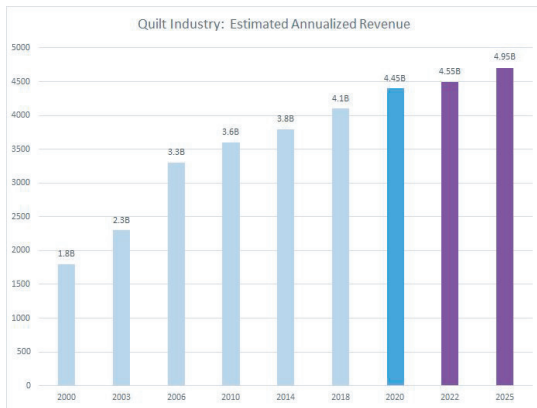
1. Availability (products)
2. Location convenience (in-store or online)
She prefers to shop 30 minutes or less from home
3. Fabric choices

Current Trends:

- Product availability is more important than price/promotion
- "How to" driving an increase in search traffic
- Majority of quilters (84%) are spending the same or more time than previous years
- Using more of her stash rather than replenishing vs. previous years
- Choosing to shop locally vs. online continues to be her preference and actually where she is shopping
- Utilizes digital/social media daily for connecting, but prefers hands-on/in-person

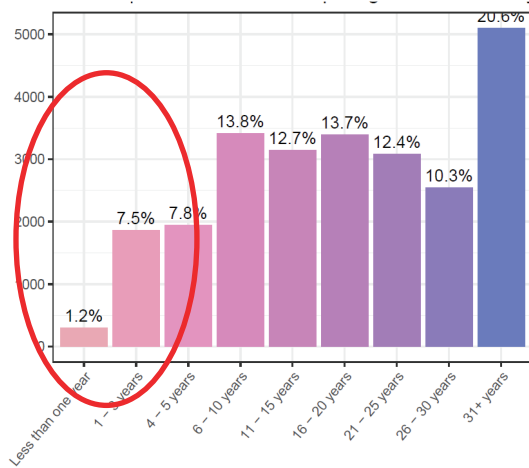


Quilting Industry - Looking Forward



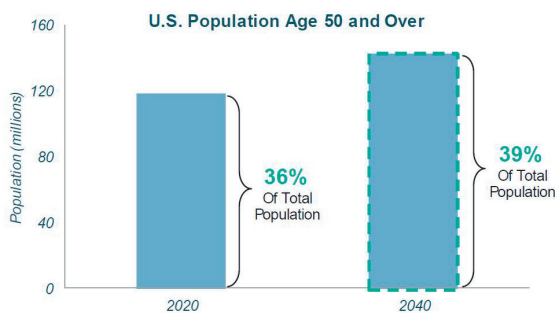
Strength of the Quilt Market will continue to provide stable and solid growth, approaching \$5 billion by 2026-2027

- Over 85 million “active creatives” in the U.S. and Canada representing more than \$35 Billion in sales (defined as individuals who have made a creative project in the past 12 months)
- Estimated 30 million active sewists, which has had a slight decrease since the pandemic years
- Quilt industry continues to have steady annual growth rates at GDP+ with 9 million to 11 million active quilters, which has remained consistent over the last 10 years



- New Quilters represent 8-10% of the population annually
- Independent interest continues to be the main driver for new quilters entering the market
- The majority of the new enthusiasts enter during 50's, when and where they have additional time and discretionary spend

Favorable Consumer Demographics



The Customer demographic profile of those that are age 50+ continues to expand through 2040 (favorable for the Quilt Industry).

Online or in person, the overall customer engagement activities will be a key factor for all retailers and brands.



Key Learnings - Looking Forward



Digital learning and inspiration continue to be in high demand, driven through YouTube and other digital media



Consumer experience before, during, and after the purchase will remain a variable of the purchase decision

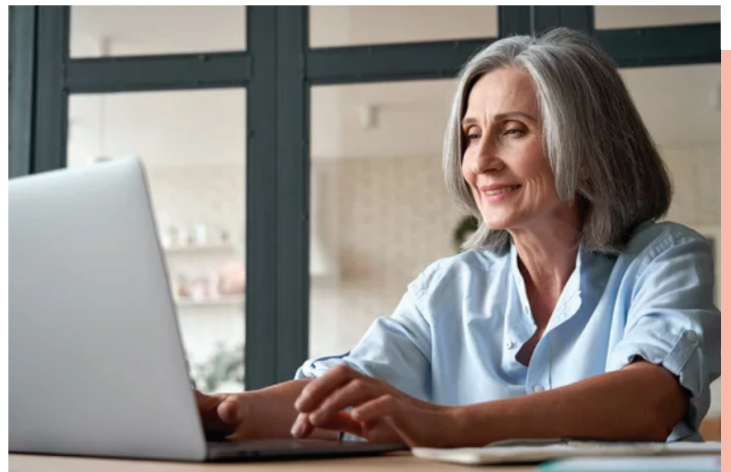


Preference will remain to purchase locally or through an independent quilt shop/sewing machine center



- Fabric selection will be a key factor of where consumers choose to shop/purchase
- Product selection/availability along with the overall consumer experience will be critical, more important than price in many cases
- "How-to" content, driven through video will continue to be an important element for education and customer engagement.

- E-commerce will continue to expand and provide choices for consumers
- The ability to be together at social events will return to pre-pandemic levels
- Increasing cost, driven by inflation, will have a minimal impact on the number of new projects a quilter begins in 2023



Funded by Premier Needle Arts