

Discovering "The Dedicated Quilter"

*The first in-depth survey of American quilters, *Quilting in America*, was conducted in the summer of 1994, and the results published in the fall of that year. Quilters were asked the most intimate details of their lives-in-craft, and a remarkable 76+% responded. Jonathan Holstein has extracted from the survey information he thought would most interest Journal readers, and has drawn a few conclusions.*

—Editors' Note

In the summer of 1994 two surveys asked a number of American quilters about themselves and their participation in the craft. The first, done in June, was sent to 40,000 U.S. households randomly selected. The second, done in July, was sent to 2,000 active quilters, those known to participate in quilting activities of some sort (making, collecting, etc.). The 2,000 were picked randomly from a number of lists of such people.

The results of the two blind surveys, both of which had rather amazing response rates of over 76%, were tabulated and published in a study, *Quilting in America 1994*, by its sponsors, *Quilters Newsletter Magazine*, a division of Lemay Publications, Inc., the journal of record in the field of American quilting, and Quilts, Inc., of Texas. The latter is the organizer of International Quilt Market and International Quilt Festival.

The purpose of the surveys, conducted by two professional research groups (see notes on the surveys at end of article), was to derive information on the American quilt for its sponsors. The data was expected to be useful in a number of ways, from demographic studies to, of course, marketing. Said Nancy O'Bryant, Executive Vice President of Quilts, Inc., "It was an effort to quantify the breadth and depth of interest in quilting in the U.S. There were no up-to-date, statistically valid figures, merely anecdotal information, hardly reliable in making a case for more coverage of quilts and quilting in the mainstream media." The published summary was largely a study of "...those quilters who drive the market—the 5.4% of all quiltmakers who account for 50% of all quilting market expenditures." The information amassed, however, is of considerable interest as a profile of the involved quilter in American society. What follows are the survey results I found most interesting.

Numbers: The numbers game with American quilters is interesting. A previous estimate made in 1983 and based on figures from the Yankelovich Monitor (Yankelovich is a national polling company) projected more than 14 million Americans involved in quilts or quilting. This 1994 survey comes up with a figure of 15.5 million quilters over the age of 18, 1.1 per household which has quilters (14,091,000, or 14.7% of all U.S. household). Each of these households

spends an average of \$110 per year on quilt-related expenditures.

If we set the total projected number of quilters against an American population of 250 million, it means that 6% of all Americans are involved in quilting in some way. This is a truly remarkable number (it is as if all of the residents of New York City, Los Angeles, Chicago, and Houston were busily involved with quilts or quilting), and I am not sure what to make of it.

Of this number, the study estimates that there is a group of approximately 840,000 quilters (5.4% of all quilters) who make 50% of the total quilt market expenditures each year (\$777 million of a total of \$1.554 billion). These are hard core quilters (called in the survey "Dedicated" quilters, and qualified by annual expenditures of more than \$400 on quilt-related purchases). This core group lives in 646,000 households which boast an average of 1.3 quilters per household. These households comprise .07% of all American households and 4.6% of all households with quilters. Again, these are significantly large numbers. While I'm sure more than .07% of all American households eat pizza and fast food, have bicycles or VCR's, the number of people significantly dedicated to most leisure-time crafts, and making significant expenditures to support it, is, I would think, quite small.

This is what "dedicated" quilters, who were self-ranked in the survey by skill level, Beginners, Intermediates and Advanced/Experts, look like:

Their Ages: The majority span two generations, 35-75. The average age is 52; 32% are aged 18-44.

Their Education: Some 68% are college educated.

Where They Live: The largest number of quilting households are, naturally, located in the densest population centers. Taken, however, as a concentration per capita (the number of quilting households in relation to population density, in other words), there are unusual concentrations of all such households in the West North Central (Iowa, Kansas, Minnesota, Missouri, Nebraska, North Dakota and South Dakota); West and East South Central (Arkansas, Louisiana, Oklahoma, Texas, Alabama, Kentucky, Mississippi and Tennessee); and Mountain (Arizona, Colorado, Idaho, Montana, New Mexico, Nevada, Utah and Wyoming) regions. There is a concentration of households with dedicated quilters in the New England (Connecticut, Massachusetts, Maine, New Hampshire, Rhode Island and Vermont); West North Central (Illinois, Indiana, Michigan, Ohio and Wisconsin); Mountain and Pacific (Alaska, California, Hawaii, Oregon and Washington) regions. It appears that the first concentration (all quilting households) is in areas where traditional culture is still strongly in place, and the

second ("dedicated" quilting households) is more in areas of greater affluence and, perhaps, sophistication. It might also be seen as a difference between more traditional quilting culture and that which has developed in areas of greater exposure or receptivity to new ways of thinking about quilts and quilting.

Their Income: Their mean household income is in excess of \$62,000 annually. More than 1/3 have annual household incomes exceeding \$60,000, 8% have household incomes between \$100,000 and \$150,000, putting them among the country's more affluent consumers.

Their Quilting Experience: The dedicated quilter has 10.5 mean years quilting experience. Slightly more than 50% described themselves as "intermediate" in skill level when given a choice of Beginner, Intermediate, and Advanced Expert; the next highest category was Advanced/Expert (about 28%). Not surprisingly, there is a strong correlation between skill level and quilting activity, with its commensurate economic investment. People who classed themselves as beginners owned an average of several hundred dollars worth of fabric and \$1,160 worth of quilt-related tools and equipment. Those who saw themselves as experts had an average of \$1,392 in fabrics (21.6% owned fabric collections worth in excess of \$2,000) and \$3,897 in tools and equipment.

Their Quilt Learning: Most said quilts books and magazines were their best sources of quilting information. Classes were also valuable sources, as were friends and television. Magazines were first (more than 80% of intermediate, advanced, and expert quilters, and about 70% of beginners, used them). Friends and relatives were significant sources of information (40-50%) for all skill levels; quilt shows, classes, guilds, workshops, and lectures were much more important to advanced/expert quilters than beginners (an example is guilds, which only 9.9% of beginners used as a source of information as compared to 50% of advanced/experts). All together they purchased an average of five quilting books last year; the average price of the last purchase was \$21. Video tapes are not significantly used by those surveyed. "Beginners rented virtually no video tapes last year and advanced/expert quilters averaged only .3 quilting video rentals. . ."

Their Annual Expenditures (shopping, shopping): Says the report: "The dedicated quilter segment is an active group of shoppers." No kidding. Each spent about \$1,360 last year on quilt-related purchases. "Big ticket" items were \$405; books, magazines, and videos were \$152; fabric was \$420; and miscellaneous/related travel was \$356. Over the previous 12 months, in addition to the expected fabric, thread, batting, needles, quilting tools, notions and quilts books (all purchased by 73% or higher), they bought patterns (67.5%), the largest number of which (38.3%) were for wall hangings, with "wearables" next (33.6%), and bed quilts third

(31.1%), bearing out a note below that 75% of their projects are not bed quilts.

Their Equipment: The total value of each dedicated quiltmaker's quilting supplies was \$2,572, plus \$922 for fabric. More than 90% of all dedicated quilters owned scissors, sewing machine, steam iron, and rotary cutter. Almost 50% owned shelving or other storage equipment (indicating a significant space commitment to the activity). Some 37.5% owned quilt racks for displaying their work, and 34.7% had floor-standing quilting frames. Lap frames were owned by 32.1%, and "PVC-type frame for hand quilting" by 28.9%. The type distribution of frame was interesting: almost 50% (49.4) of advanced/expert quilters used floor frames as opposed to 14.5% of beginners. The latter's favorite frame was the lap type. Some 33.7% of all dedicated quilters said they owned personal computers (28.1% IBM or IBM clone versus 6.4% Apple MacIntosh), and 8.9% had quilt design software (2% of Beginners and 16% of Advanced/Experts).

Their Fabric Purchases and Preferences: They planned to buy 60 million yards of fabric in the next year. They spend \$420 on cloth in an average year (24% of them spend over \$500). The annual textile purchases of a dedicated quilter in the year preceding the survey amounted to 72 yards at an average of \$5.83 per yard. Quilters who rated themselves as advanced or expert bought an average of 107 yards per year at an average cost of \$6.49 per yard, and their fabric collections averaged \$1,392 in total value.

They much preferred 100% cotton fabrics; 88.5% used that "most often" in their quilts. The poly/cotton blends "run a distant second, with 10% of dedicated quilters using this type of fabric most often. . ." Some 20% of fabric purchases in the last year were solid colors; the rest were patterns. The most popular were floral prints, with 87% purchasing such prints, and the most popular had designs in small scale. As to preferred colors, 35.6% favored what were described as colors in the "jewel tone" family (royal blue, fuchsia, purple, and emerald green). Pastels were next; 31.3% reported they purchased most often in this color family.

Some 82.3% bought their fabrics at a general fabric store; 68.2% shopped at "independent quilt shops." Discount stores saw 47.1% of them. The higher the skill level, the more specialty shopping: 83.5% of advanced/expert quilters shopped at quilt stores as compared to 37.7% of beginners. And 62.6% of advanced/expert quilters selected quilt shops "as their favorite source for quilting fabric vs. 26.1% of beginners, who cite general fabric stores as their favorite source." The single most important characteristic in a retail outlet was, naturally enough, a wide fabric selection.

Their Projects: They start an average of 12.7 projects per year, more than one each month (I wonder what this means; how many projects do they finish?). The higher the skill level, the more projects are initiated. Advanced/expert

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quilters initiate an average of 17.1 projects per year. Of these, a startling 75% "are not bed quilts, but smaller projects such as miniature quilts, wall hangings, fashion articles and functional articles..." (mostly home decorating items). The largest single category of projects started was "Wall Hangings," with 2.2 projects started annually by the average dedicated quilter. This perhaps reflects an interest in making "art" through the quilting medium on the part of sophisticated quilters. Some other crafts of significant interest to them in addition to those mentioned above were Christmas decorations, embroidery, crocheting, doll making and knitting. Each spends an average of 40.2 hours per month (!) at their project; 23% spent more than 65 hours per month. (Some 62%, more than 500,000 people, said they planned to give more time to quilting during the next three years, but such good intentions are often significantly unrealized.)

They did have some other leisure time activities. Almost 80% said they read for pleasure, 68% walked for exercise, over 50% gardened. They cooked, took adult education classes, collected antiques, took photos, swam, watched birds, camped, rode bicycles, boated, made music and hiked, some with backpacks.

The Way They Work: Catch this: 92% said they preferred to work alone; I wonder what percentage of other American quilters would show this preference, and if it relates to the making of the top only. And this: The majority prefer traditional quilts and quilt patterns, though 44% also liked "variation on traditional patterns." Nearly 80% used machine piecing and rotary cutting during the past year. Some hand piecing was done by 47.1% (26.5% of beginners compared to 61.1% of advanced/expert quilters), hand appliqué was used by 53.6% (23.1% of beginners vs. 72% of advanced/experts), strip piecing by 52.1%, and machine quilting by 52.7%.

About 18.5% said they used surface embellishments (beginners, 4.6% vs. advanced/expert, 34.5%). Crazy quilting was done by 15.3%, paper piecing by 19.2%, string piecing by 12.2%, and percentages under 10 for such techniques as fabric painting, stenciling, rubber stamping, trapunto, dyeing fabrics, photo transfer and marbling.

I found these speculations most immediately interesting:

The "dedicated quilter" would appear from this study to be well-educated, affluent, active, have broad interests . . . a portrait of the idealized American mom updated for the 90's (all that healthy exercise and outdoor activity). Not surprisingly, she appears also to be conservative, preferring traditional patterns and colors and small-figured patterns (those which would be in "good taste"); design innovation in quilting is happening elsewhere. Additionally, I would guess many of these quilters came to it not through the more traditional mode of oral transmission but through the apparatus of the modern quilt revival.

The small number of bed-sized quilts included in her projects surprised me, but quilting is only one of a number

of needlework pursuits this energetic woman follows; 70% listed "sewing" as another craft they pursued distinct from other leisure-time activities (which, as we have seen, were numerous). Quilting appears to be a craft experience for her, a leisure-time pursuit more than a conscious effort to make "art" or, obviously, necessary bed covers. They are great consumers of quilt information in most media; their profiles, including the large numbers who have computers, indicates they are in technology-conscious families.

Their significant spending power gives them probably more clout in the market place than they realize. A number of mini- and not-so-mini-industries are built around their predilections. One interesting thing is the intense entrepreneurial nature of quilt businesses; most are classic examples of businesses developed to meet specific opportunities too small or specialized to be addressed by "big" business.

I leave it to the reader to mine these surveys further.

Sources and Survey Information: My information was drawn from these sources: Press releases containing information extracted from the surveys and prepared by Quilts, Inc., and *Quilters Newsletter Magazine*, and an "Executive Summary" of the survey results, also prepared by the two organizations. The latter contains summaries of survey findings, extensive tabulations of specific categories, information on methodology, etc., and is available for \$250 from *Quilter's Newsletter Magazine* through Tina Battock, QNM, Box 4101, Golden, CO 80402-4101. Her phone number is 303-278-1010. Its full title is "Quilting in America 1994: A Comprehensive Study of the U.S. Quilting Market Executive Summary."

Methodology: (The following information on methodology was taken from the Methodology section in the Executive Summary of the study.)

The first survey was done in July of 1994 by NFO Research, Inc. (said in the Executive Summary to be "the 8th largest marketing research company in the United States"). Its purpose was "to determine the size of the U.S. quiltmaking market in terms of both the number of adults (18-plus) involved in the activity and their annual expenditures."

The questionnaire went "to 40,000 U.S. households scientifically selected to be representative of all U.S. households. Six weeks were allowed for survey returns, and 30,667 households responded, a return rate of 76.7%."

The second survey was conducted by ABACUS Custom Research, Inc., "an independent marketing research company located in Emmaus, Pennsylvania." For study, an "nth" sample of 2,000 known quilting consumers was selected. Each was sent an "alert" letter in June of 1994 and the survey during the same month. "A total of 1,516 usable survey questionnaire surveys were obtained by fixed random sampling procedures. This represents a recovery of 76.3% of all eligible."