

Arts and Crafts Consumer - US - January 2015

Report Price: £2466.89 | \$3995.00 | €3133.71

The above prices are correct at the time of publication, but are subject to change due to currency fluctuations.



“The abundance of online communities available to support craft inspiration and instruction has opened new doors for novices and experts interested in crafting. Moreover, these digital platforms have given marketers fresh insights into the wants and needs of the target crafting audience.”

– Dana Spencer, Lifestyles & Leisure Analyst

This report looks at the following areas:

- How can marketers convert browsers into crafters?
- Is DIY shifting from a necessity back to optional in the growing economy?
- Can engaging boys increase the number of men interested in crafting?

The arts and crafts market was boosted in 2008 as consumers turned to DIY (do-it-yourself) tactics to cut spending during the economic downturn. As the economy continues to strengthen, however, participation in arts and crafts remains steady, with approximately 129 million US adults taking part. The popularity of crafting has remained stable in part due to the awareness and engagement driven by social networking platforms like Pinterest and online marketplaces like Etsy. The growth of this market is reflected in the expansion of specialty craft chains, with all three major companies (Michaels, Hobby Lobby, and Jo-Ann Stores) adding new store locations in the past two years.

While the core crafting audience remains young women and mothers, there are opportunities for marketers to pursue other segments, such as Hispanics and men, who over index for spending in the category. These secondary segments may have crafting needs that are yet to be satisfied as their motivations, shopping behaviors, and preferred crafts differ from the core audience.

BUY THIS
REPORT NOW

VISIT:
store.mintel.com

CALL:
EMEA
+44 (0) 20 7606 4533

Brazil
0800 095 9094

Americas
+1 (312) 943 5250

APAC
+61 (0) 2 8284 8100

EMAIL:
reports@mintel.com

DID YOU KNOW?

This report is part of a series of reports, produced to provide you with a more holistic view of this market

Arts and Crafts Consumer - US - January 2015

Report Price: £2466.89 | \$3995.00 | €3133.71

The above prices are correct at the time of publication, but are subject to change due to currency fluctuations.

Table of Contents

Scope and Themes

What you need to know
 Definition
 Data sources
 Consumer survey data
 Consumer qualitative research
 Direct marketing creative
 Abbreviations and terms
 Abbreviations
 Terms

Executive Summary

The market: Crafting participation rates are stable

Figure 1: Arts and crafts activities in the last 12 months, July 2007-September 2014

Women aged 18-34 most likely to craft

Figure 2: Participation in arts and crafts in the last 12 months

Retailers: Expansion plans demonstrate continued interest in crafting

Figure 3: Arts and crafts stores shopped at in the last three months, July 2007-September 2014

Figure 4: Retail destinations for art and craft materials, November 2014

Innovations and innovators

Marketing strategies

The consumer

Photo projects are the most popular type of craft

Figure 5: Top five types of arts and crafts made in the last 12 months, November 2014

Male crafters spend more than average on craft materials

Figure 6: Dedication to crafts in the last 12 months – Median dollar amount spent on art/craft projects, by gender and by age, November 2014

Crafters inspired by Pinterest and craft magazines

Figure 7: Top resources for craft ideas and inspiration, November 2014

Crafters just want to have fun

Figure 8: Top motivations for making arts/crafts, by gender, November 2014

What we think

Issues and Insights

How can marketers convert browsers into crafters?

The issues:

The implications:

Is DIY shifting from a necessity back to optional in the growing economy?

The issues:

**BUY THIS
REPORT NOW**

VISIT: store.mintel.com
 CALL: EMEA +44 (0) 20 7606 4533 | Brazil 0800 095 9094
 Americas +1 (312) 943 5250 | APAC +61 (0) 2 8284 8100
 EMAIL: reports@mintel.com

Arts and Crafts Consumer - US - January 2015

Report Price: £2466.89 | \$3995.00 | €3133.71

The above prices are correct at the time of publication, but are subject to change due to currency fluctuations.

The implications:

Can engaging boys increase the number of men interested in crafting?

The issues:

The implications:

Trend Application

Trend: Play Ethic

Trend: Click and Connect

Trend: Survival Skills

The Market

Key points

Crafting participation holding relatively steady, overall

Figure 9: Arts and crafts activities in the last 12 months, July 2007-September 2014

Figure 10: Needlearts enthusiast market size and spending, 2013

Michaels and Hobby Lobby experience growth

Figure 11: Arts and crafts stores shopped at in the last three months, July 2007-September 2014

Traditional crafting popular with kids aged 6-11

Figure 12: Toys and games kids own or use, May 2005-June 2014

Figure 13: Toys and games kids own or use, May 2005-June 2014

Figure 14: Kids' tablet use, by gender and age, April 2013-June 2014

Pinterest pushes craft market forward

Figure 15: Number of unique US visitors to Pinterest from January 11- October 14 (in millions)

Retailer Overview – Brick-and-mortar Retailers

Key points

Michaels Stores Inc.

Company overview

Figure 16: Michaels Stores share of revenues, by product category, fiscal years ending 2011-13

Figure 17: Michaels store count at end of fiscal years 2009-13

Competitive analysis

Jo-Ann Fabric and Craft Stores

Company overview

Competitive analysis

Hobby Lobby Stores Inc.

Company overview

Competitive analysis

Retailer Overview – Online Enterprises

Key points

Etsy

About

BUY THIS
REPORT NOW

VISIT: store.mintel.com

CALL: EMEA +44 (0) 20 7606 4533 | Brazil 0800 095 9094

Americas +1 (312) 943 5250 | APAC +61 (0) 2 8284 8100

EMAIL: reports@mintel.com

Arts and Crafts Consumer - US - January 2015

Report Price: £2466.89 | \$3995.00 | €3133.71

The above prices are correct at the time of publication, but are subject to change due to currency fluctuations.

Impact on crafters

Figure 18: Etsy email, December 2013

Pinterest

About

Figure 19: Pinterest website traffic, December 2013-November 2014

Impact on crafters

Craftsy

About

Innovations and Innovators

Craftwell eBrush

Figure 20: Craftwell eBrush: A brief demonstration video, June 2014

OttLite Craft Caddy Lamp

Renegade Handcrafted CB2 Collection

Brother International Corporation ScanNCut machine

Figure 21: Brother™ ScanNCut Feature: Direct Cut and Scanning, September 2014

3-D Printing

Figure 22: Shapeways, "How 3-D Printing Works," 2014

Figure 23: Crayon Creatures, 2014

Craft trends

Upcycling

Personalization

Function over form

Cake decorating

Marketing Strategies

Figure 24: Brand analysis of key retailers

Figure 25: Social media followers by platform, November 2104

Michaels Stores

Figure 26: Michaels email ad, April 2014

Online initiatives

Figure 27: Michaels Instagram page, April 2014

Jo-Ann Fabric and Craft Stores

Figure 28: Project Runway Threads Premiere TV ad, October 2014

Online initiatives

Figure 29: Jo-Ann Stores mobile app, April 2014

Hobby Lobby

Online initiatives

Figure 30: Hobby Lobby email landing page, April 2014

Walmart

Online initiatives

BUY THIS
REPORT NOW

VISIT: store.mintel.com

CALL: EMEA +44 (0) 20 7606 4533 | Brazil 0800 095 9094

Americas +1 (312) 943 5250 | APAC +61 (0) 2 8284 8100

EMAIL: reports@mintel.com

Arts and Crafts Consumer - US - January 2015

Report Price: £2466.89 | \$3995.00 | €3133.71

The above prices are correct at the time of publication, but are subject to change due to currency fluctuations.

Opportunities for other retailers

Types of Arts and Crafts Made in the Last 12 Months

Key points

A variety of craft types are popular with consumers

Figure 31: Any arts and crafts made in the last 12 months, November 2014

Women more likely than men to make crafts

Figure 32: Types of arts and crafts made in the last 12 months, by gender, November 2014

18-34s more likely to craft

Parents and larger households more likely to make arts and crafts

Figure 33: Types of arts and crafts made in the last 12 months, by age of children in household, November 2014

Figure 34: Any arts and crafts made in the last 12 months, by household size, November 2014

Household income not a driver for craft participation

Figure 35: Any arts and crafts made in the last 12 months, by household income, November 2014

Involvement in Arts and Crafts

Key points

Women more likely to have crafted as children

Figure 36: Involvement with arts and crafts, by gender, November 2014

Figure 37: Toys and games kids own or use, by gender, April 2013-June 2014

Childhood crafting in and out of the classroom

Figure 38: Involvement with arts and crafts, by household income, November 2014

Money Spent on Arts and Crafts

Key points

Advanced crafters and male crafters spend more than average

Figure 39: Dedication to crafts in the last 12 months – Separate art/craft projects worked on, by skill level, November 2014

Figure 40: Dedication to crafts in the last 12 months – Median dollar amount spent on art/craft projects, by skill level, November 2014

Male crafters spend more than women

Figure 41: Dedication to crafts in the last 12 months – Median dollar amount spent on art/craft projects, by gender and by age, November 2014

Figure 42: Dedication to crafts in the last 12 months – Median dollar amount spent on art/craft projects, by presence and age of children in household, November 2014

Duration of Involvement in Arts and Crafts

Key points

Engaging longtime crafters

Figure 43: Length of involvement, by presence of children in household, November 2014

Retailers Shopped for Arts and Crafts Materials

Key points

Preferred retail destinations

Figure 44: Retail destinations for art and craft materials, by gender, November 2014

Figure 45: Arts and crafts stores shopped at in the last three months, July 2007-September 2014

**BUY THIS
REPORT NOW**

VISIT: store.mintel.com

CALL: EMEA +44 (0) 20 7606 4533 | Brazil 0800 095 9094

Americas +1 (312) 943 5250 | APAC +61 (0) 2 8284 8100

EMAIL: reports@mintel.com

Arts and Crafts Consumer - US - January 2015

Report Price: £2466.89 | \$3995.00 | €3133.71

The above prices are correct at the time of publication, but are subject to change due to currency fluctuations.

Arts and Crafts Purchasing Behaviors

Key points

Female crafters looking for a good deal

Loyalty programs could be improved

Male crafters likely information seekers

Figure 46: Shopping behaviors for arts and crafts in-store, by gender, November 2014

The Crafting Experience

Key points

Craft inspiration

Crafters most inspired by Pinterest

Men find inspiration in home improvement

Figure 47: Home Depot Pinterest page, January 2014

Figure 48: Resources for craft ideas and inspiration, by gender, November 2014

Motivation

Crafting: fun for all ages

Figure 49: Motivations for making arts/crafts, by gender, November 2014

Figure 50: Michaels email landing page, April 2014

Crafting as stress relief

Parents want kids to express creativity

Figure 51: Motivations for making arts/crafts, by gender, November 2014

Longtime crafters see all the benefits of crafting

Figure 52: Motivations for making arts/crafts, by duration of involvement, November 2014

Location of craft making

Few crafters work in a dedicated crafting space

Figure 53: Location of craft making, by gender, November 2014

Crafting is typically solo, potential to promote more social aspects

Impact of Race and Hispanic Origin

Key points

Furniture and home décor popular craft types for Hispanics

Figure 54: Types of arts and crafts made in the last 12 months, by race/Hispanic origin, November 2014

Hispanic crafters spend more than average

Figure 55: Dedication to crafts in the last 12 months – Money spent on art/craft projects, by race/Hispanic origin, November 2014

Whites more likely to be long-term crafters

Figure 56: Length of involvement, by race/Hispanic origin, November 2014

Hispanics less likely to shop in specialty craft stores

Figure 57: Retail destinations for art and craft materials, by race/Hispanic origin, November 2014

Hispanics looking for high-quality craft materials

Figure 58: Shopping behaviors for arts and crafts in-store, by race/Hispanic origin, November 2014

**BUY THIS
REPORT NOW**

VISIT: store.mintel.com

CALL: EMEA +44 (0) 20 7606 4533 | Brazil 0800 095 9094

Americas +1 (312) 943 5250 | APAC +61 (0) 2 8284 8100

EMAIL: reports@mintel.com

Arts and Crafts Consumer - US - January 2015

Report Price: £2466.89 | \$3995.00 | €3133.71

The above prices are correct at the time of publication, but are subject to change due to currency fluctuations.

Black consumers look to HGTV for inspiration

Figure 59: Resources for craft ideas and inspiration, by race/Hispanic origin, November 2014

Consumer Segmentation

Segmentation overview

Figure 60: Crafting segments and characteristics, November 2014

Figure 61: Crafting segments, November 2014

Heavy Crafters

Definition and demographics

Characteristics

Opportunity

Casual Crafters

Definition and demographics

Characteristics

Opportunity

Large Project Crafters

Definition and demographics

Characteristics

Opportunity

High Output Crafters

Definition and demographics

Characteristics

Opportunity

Mid-Low Budget Variety

Definition and demographics

Characteristics

Opportunity

Segment demographics

Figure 62: Crafting segments by gender, age, household income, primary residence, November 2014

Segment characteristics

Figure 63: Type of art/craft made most often, by crafting segments, November 2014

Figure 64: Shopping behaviors for arts and crafts in-store, by crafting segments, November 2014

Figure 65: Resources for craft ideas and inspiration, by crafting segments, November 2014

Figure 66: Length of involvement, by crafting segments, November 2014

Appendix – Other Useful Consumer Tables

Participation in arts and crafts

Figure 67: Arts and crafts activities in the last 12 months, by gender, August 2013-September 2014

Figure 68: Arts and crafts activities in the last 12 months, by age, August 2013-September 2014

Figure 69: Arts and crafts activities in the last 12 months, by race/Hispanic origin, August 2013-September 2014

Figure 70: Arts and crafts activities in the last 12 months, by household income, August 2013-September 2014

BUY THIS
REPORT NOW

VISIT: store.mintel.com

CALL: EMEA +44 (0) 20 7606 4533 | Brazil 0800 095 9094

Americas +1 (312) 943 5250 | APAC +61 (0) 2 8284 8100

EMAIL: reports@mintel.com

Arts and Crafts Consumer - US - January 2015

Report Price: £2466.89 | \$3995.00 | €3133.71

The above prices are correct at the time of publication, but are subject to change due to currency fluctuations.

Figure 71: Toys and games kids own or use, by age, April 2013-June 2014

Figure 72: Toys and games kids own or use, by gender and age, April 2013-June 2014

Figure 73: Toys and games kids own or use, by race/Hispanic origin, April 2013-June 2014

Hobbies and leisure time

Figure 74: Video games, by demographics, April 2013-June 2014

Figure 75: Free time, by demographics, April 2013-June 2014

Figure 76: Hobbies/activities, by gender, April 2013-June 2014

Figure 77: Hobbies/activities, by age, April 2013-June 2014

Figure 78: Hobbies/activities, by gender and age, April 2013-June 2014

Figure 79: Hobbies/activities, by race/Hispanic origin, April 2013-June 2014

Figure 80: Electronics, by gender, April 2013-June 2014

Figure 81: Electronics, by age, April 2013-June 2014

Figure 82: Electronics, by gender and age, April 2013-June 2014

Figure 83: Electronics, by race/Hispanic origin, April 2013-June 2014

Figure 84: Tablet use, by demographics, April 2013-June 2014

Figure 85: Tablets use, by gender, April 2013-June 2014

Figure 86: Tablet use, by age, April 2013-June 2014

Figure 87: Tablet use, by gender and age, April 2013-June 2014

Figure 88: Tablets, by race/Hispanic origin, April 2013-June 2014

Figure 89: Tablets activities, by gender, April 2013-June 2014

Figure 90: Tablets activities, by age, April 2013-June 2014

Figure 91: Tablets activities, by gender and age, April 2013-June 2014

Figure 92: Tablets activities, by race/Hispanic origin, April 2013-June 2014

Types of arts and crafts made

Figure 93: Types of arts and crafts made in the last 12 months, November 2014

Figure 94: Types of arts and crafts made in the last 12 months, by age, November 2014

Figure 95: Types of arts and crafts made in the last 12 months, by gender and age, November 2014

Figure 96: Types of arts and crafts made in the last 12 months, by race/Hispanic origin, November 2014

Figure 97: Types of arts and crafts made in the last 12 months, by household income, November 2014

Figure 98: Types of arts and crafts made in the last 12 months, by presence of children in household, November 2014

Figure 99: Types of arts and crafts made in the last 12 months, by household size, November 2014

Type of art/craft made most often

Figure 100: Type of art/craft made most often, November 2014

Figure 101: Type of art/craft made most often, by gender, November 2014

Figure 102: Type of art/craft made most often, by age, November 2014

Figure 103: Type of art/craft made most often, by crafting segments, November 2014

Involvement with arts and crafts

Figure 104: Involvement with arts and crafts, November 2014

Figure 105: Involvement with arts and crafts, by age, November 2014

**BUY THIS
REPORT NOW**

VISIT: store.mintel.com

CALL: EMEA +44 (0) 20 7606 4533 | Brazil 0800 095 9094

Americas +1 (312) 943 5250 | APAC +61 (0) 2 8284 8100

EMAIL: reports@mintel.com

Arts and Crafts Consumer - US - January 2015

Report Price: £2466.89 | \$3995.00 | €3133.71

The above prices are correct at the time of publication, but are subject to change due to currency fluctuations.

Figure 106: Involvement with arts and crafts, by gender and age, November 2014

Figure 107: Involvement with arts and crafts, by race/Hispanic origin, November 2014

Figure 108: Involvement with arts and crafts, by household income, November 2014

Figure 109: Involvement with arts and crafts, by frequency of crafting, November 2014

Figure 110: Involvement with arts and crafts, by skill level, November 2014

Figure 111: Involvement with arts and crafts, by crafting segments November 2014

Figure 112: Involvement with arts and crafts, by crafting segments, November 2014

Dedication to arts and crafts

Separate art/craft projects worked on

Figure 113: Dedication to crafts in the last 12 months, November 2014

Figure 114: Dedication to crafts in the last 12 months – Separate art/craft projects worked on, November 2014

Figure 115: Dedication to crafts in the last 12 months – Separate art/craft projects worked on, by presence of children in household, November 2014

Figure 116: Dedication to crafts in the last 12 months – Separate art/craft projects worked on, by age of children in household, November 2014

Figure 117: Dedication to crafts in the last 12 months – Separate art/craft projects worked on, by duration of involvement, November 2014

Figure 118: Dedication to crafts in the last 12 months – Separate art/craft projects worked on, by crafting segments, November 2014

Figure 119: Dedication to crafts in the last 12 months – Separate art/craft projects worked on, by crafting segments, November 2014

Money spent on crafts

Figure 120: Dedication to crafts in the last 12 months – Money spent on art/craft projects, by gender, November 2014

Figure 121: Dedication to crafts in the last 12 months – Money spent on art/craft projects, by age, November 2014

Figure 122: Dedication to crafts in the last 12 months – Money spent on art/craft projects, by presence of children in household, November 2014

Figure 123: Dedication to crafts in the last 12 months – Money spent on art/craft projects, by age of children in household, November 2014

Figure 124: Dedication to crafts in the last 12 months – Money spent on art/craft projects, by skill level, November 2014

Duration of involvement

Figure 125: Length of involvement, November 2014

Figure 126: Length of involvement, by gender, November 2014

Figure 127: Length of involvement, by presence of children in household, November 2014

Figure 128: Length of involvement, by age of children in household, November 2014

Frequency of crafting

Figure 129: Frequency of crafting, November 2014

Figure 130: Frequency of crafting, by gender, November 2014

Figure 131: Frequency of crafting, by age, November 2014

Figure 132: Frequency of crafting, by race/Hispanic origin, November 2014

Figure 133: Frequency of crafting, by presence of children in household, November 2014

Figure 134: Frequency of crafting, by age of children in household, November 2014

Figure 135: Frequency of crafting, by duration of involvement, November 2014

Skill level

Figure 136: Skill level, November 2014

Figure 137: Skill level, by household income, November 2014

Figure 138: Skill level, by duration of involvement, November 2014

**BUY THIS
REPORT NOW**

VISIT: store.mintel.com

CALL: EMEA +44 (0) 20 7606 4533 | Brazil 0800 095 9094

Americas +1 (312) 943 5250 | APAC +61 (0) 2 8284 8100

EMAIL: reports@mintel.com

Arts and Crafts Consumer - US - January 2015

Report Price: £2466.89 | \$3995.00 | €3133.71

The above prices are correct at the time of publication, but are subject to change due to currency fluctuations.

Figure 139: Skill level, by frequency of crafting, November 2014

Retail destinations

Figure 140: Retail destinations for art and craft materials, November 2014

Figure 141: Retail destinations for art and craft materials, by age, November 2014

Figure 142: Retail destinations for art and craft materials, by gender and age, November 2014

Figure 143: Retail destinations for art and craft materials, by household income, November 2014

Figure 144: Retail destinations for art and craft materials, by presence of children in household, November 2014

Figure 145: Retail destinations for art and craft materials, by age of children in household, November 2014

Figure 146: Retail destinations for art and craft materials, by duration of involvement, November 2014

Figure 147: Retail destinations for art and craft materials, by frequency of crafting, November 2014

Figure 148: Retail destinations for art and craft materials, by crafting segments, November 2014

Figure 149: Retail destinations for art and craft materials, by craft made most often, November 2014

Figure 150: Arts and crafts stores shopped at in the last three months, by demographics, August 2013-September 2014

Figure 151: Arts and crafts stores shopped at in the last three months, by race/Hispanic origin, August 2013-September 2014

Figure 152: Arts and crafts stores shopped at in the last three months, by demographics, August 2013-September 2014

Figure 153: Arts and crafts stores shopped at in the last three months, by race/Hispanic origin, August 2013-September 2014

Purchasing behaviors

Figure 154: Shopping behaviors for arts and crafts in-store, November 2014

Figure 155: Shopping behaviors for arts and crafts in-store, by age, November 2014

Figure 156: Shopping behaviors for arts and crafts in-store, by household income, November 2014

Figure 157: Shopping behaviors for arts and crafts in-store, by crafting segments, November 2014

Craft inspiration

Figure 158: Resources for craft ideas and inspiration, November 2014

Figure 159: Resources for craft ideas and inspiration, by age, November 2014

Figure 160: Resources for craft ideas and inspiration, by household income, November 2014

Figure 161: Resources for craft ideas and inspiration, by crafting segments, November 2014

Figure 162: Resources for craft ideas and inspiration, by craft made most often, November 2014

Craft motivations

Figure 163: Motivations for making arts/crafts, November 2014

Figure 164: Motivations for making arts/crafts, by age, November 2014

Figure 165: Motivations for making arts/crafts, by household income, November 2014

Figure 166: Motivations for making arts/crafts, by presence of children in household, November 2014

Figure 167: Motivations for making arts/crafts, by age of children in household, November 2014

Figure 168: Motivations for making arts/crafts, by skill level, November 2014

Figure 169: Motivations for making arts/crafts, by crafting segments, November 2014

Location of craft making

Figure 170: Location of craft making, November 2014

Figure 171: Location of craft making, by household income, November 2014

Figure 172: Location of craft making, by crafting segments, November 2014

**BUY THIS
REPORT NOW**

VISIT: store.mintel.com

CALL: EMEA +44 (0) 20 7606 4533 | Brazil 0800 095 9094

Americas +1 (312) 943 5250 | APAC +61 (0) 2 8284 8100

EMAIL: reports@mintel.com

Arts and Crafts Consumer - US - January 2015

Report Price: £2466.89 | \$3995.00 | €3133.71

The above prices are correct at the time of publication, but are subject to change due to currency fluctuations.

Figure 173: Location of craft making, by crafting segments, November 2014

Appendix – Trade Associations

BUY THIS
REPORT NOW

VISIT: store.mintel.com
CALL: EMEA +44 (0) 20 7606 4533 | Brazil 0800 095 9094
Americas +1 (312) 943 5250 | APAC +61 (0) 2 8284 8100
EMAIL: reports@mintel.com