

The Arts and Crafts Consumer - US - January 2019

Report Price: £3254.83 | \$4395.00 | €3662.99

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



"Participation in crafts has declined slightly among the adult population, while there was a small uptick among kids and teens from the last year. As of now, crafting is being bolstered by adults of the iGeneration (aged 18-24) and most of all Millennials (aged 25-42). In order to stay relevant, arts and crafts retailers will have to tap into the crafting motivations of these generations."

- **Mike Gallinari, Travel & Leisure Analyst**

This report looks at the following areas:

- Traditional crafts are declining
- Stereotypes persist
- Mass merchandizers and craft stores are in tight competition
- Talent and time deter people from crafting

**BUY THIS
REPORT NOW**

VISIT:
store.mintel.com

CALL:
EMEA
+44 (0) 20 7606 4533

Brazil
0800 095 9094

Americas
+1 (312) 943 5250

China
+86 (21) 6032 7300

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

The Arts and Crafts Consumer - US - January 2019

Report Price: £3254.83 | \$4395.00 | €3662.99

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

Table of Contents

Overview

What you need to know

Definition

Executive Summary

Overview

The issues

Traditional crafts are declining

Figure 1: Adult craft participation in the last 12 months (net) – Simmons, 2010-18

Stereotypes persist

Mass merchandizers and craft stores are in tight competition

Figure 2: Craft purchase location, November 2018

Talent and time deter people from crafting

Figure 3: Barriers to crafting for interested noncrafters, November 2018

The opportunities

Hispanic crafters

Figure 4: Craft participation, by race and Hispanic origin, by type, November 2018

Simple projects

Figure 5: Craft participation, by type, November 2018

Instagram may be the new Pinterest

Figure 6: Social media usage for project inspiration, iGens and Millennials, November 2018

What it means

The Market – What You Need to Know

Crafting is down among adults, up among teens and kids

Fewer households with kids makes reaching the youth more important

The end of Toys“R”Us leads craft stores to diversify

Screens fight for attention

Michaels is toying with competitors

Hobby Lobby sticks to its principles

Jo-Ann rebrands

Etsy gets-y serious

Mass merchandizers are relying on scale, convenience

The Market

Traditional craft participation by adults continues its bumpy ride

Figure 7: Adult craft participation in the last 12 months (net) – Simmons, 2010-18

All surveyed crafts decline among adults

Figure 8: Adult participation in specific crafts in the last 12 months (Simmons), 2010-18

**BUY THIS
REPORT NOW**

VISIT: store.mintel.com

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

Americas +1 (312) 943 5250 | China +86 (21) 6032 7300

APAC +61 (0) 2 8284 8100 |

EMAIL: reports@mintel.com

The Arts and Crafts Consumer - US - January 2019

Report Price: £3254.83 | \$4395.00 | €3662.99

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

Uptick in participation among kids and teens

Figure 9: Teens' and kids' participation in crafts in the last 12 months (Simmons), net any craft, 2010-18

Declining for adults, photography is rebounding for teens

Figure 10: Teens' participation in specific crafts in the last 12 months (Simmons), 2010-18

Figure 11: Kids' participation in specific crafts in the last 12 months (Simmons), 2010-18

Market Factors

Continued decline of the share of households with children

Figure 12: Share of households, by presence of related children, 2008-18

There's money to spend, but people may need convincing to craft

Figure 13: Disposable personal income change from previous period, January 2007-November 2018

Market Perspective

RIP Toys"R"Us

Party on

Mobile games make recreation a battle royale

Figure 14: Profile of mobile device gamer, March 2018

Reuniting families by limiting screen time

Figure 15: Millennial priorities, by parental status, March 2018

Key Retailers

Michaels Stores Inc.

Figure 16: Net of sales and number of Michaels and related stores at the end of FY 2012-17

Hobby Lobby

Figure 17: Hobby Lobby 50%-Off Christmas Sale, November 2018

Jo-Ann Stores, Inc.

Etsy

Mass merchandisers

Figure 18: Walmart's Art, Craft, Sewing & Party Supplies website menu, December 2018

Key Trends – What You Need to Know

Paper crafts, crocheting emerging on social

Magnets attracting attention

Turning against perfection

Tariffs threaten to raise prices

Print media continues to struggle

Etsy may be alienating its base

In 2019, put a ^_^ on it

Dressing up a hobby

Wellness hits arts and crafts

What's Popular?

Paper chase

BUY THIS
REPORT NOW

VISIT: store.mintel.com

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

Americas +1 (312) 943 5250 | China +86 (21) 6032 7300

APAC +61 (0) 2 8284 8100 |

EMAIL: reports@mintel.com

The Arts and Crafts Consumer - US - January 2019

Report Price: £3254.83 | \$4395.00 | €3662.99

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

Figure 19: Top arts and crafts topics on Instagram, globally, November 2017-18

Crocheting conversations on the rise

Figure 20: Top arts and crafts topics on Pinterest, November 2017-18

Licensed characters attract fan purchase

Figure 21: Opinions of licensed character merchandise, by gender and parental status, July 2018

Magnets attracting consumers

Celebrating our #fails

Figure 22: Instances of "Pinterest fails" on Pinterest, November 2017-18

Public shared workshops

What's Struggling?

Tariffs affect craft materials

Folding magazines make bad papercraft

Etsy changes vex sellers

What's Next?

2019 arts and crafts trends

Subdued yet rich

Continued cosplay growth

Wellness through crafting

Figure 23: LEGO Forma: First Of Its Kind Partnership with Indiegogo, October 2018

Etsy Premium

Craft with me?

The Consumer – What You Need to Know

Millennials are the craft generation

Hispanics are a huge opportunity

Easy, please-y

Technology is the future

Specialty retailers face challenges from online sellers

Pinterest most popular source of inspiration, but doesn't reign

Make instructions digestible

There is value in the process

The Crafter

Crafting most popular among the young

Figure 24: Craft participation, November 2018

Figure 25: Incidence of crafting, by gender and generation, November 2018

Millennial passions include crafts

Figure 26: Passion for crafting, by gender, generation, and income, November 2018

Crafting lowest among highest earners

Figure 27: Craft participation, by household income, November 2018

BUY THIS
REPORT NOW

VISIT: store.mintel.com

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

Americas +1 (312) 943 5250 | China +86 (21) 6032 7300

APAC +61 (0) 2 8284 8100 |

EMAIL: reports@mintel.com

The Arts and Crafts Consumer - US - January 2019

Report Price: £3254.83 | \$4395.00 | €3662.99

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

Impressions of crafters

They're everywhere!

Figure 28: Craft participation, by area, November 2018

Crafting isn't always about the destination

Figure 29: Perceptions of process over result, by gender, November 2018

The Projects

Simple crafts are the most popular

Figure 30: Craft participation, by type, November 2018

Parent crafting drop-off

Figure 31: Craft participation of parents, by age group of children, November 2018

Hispanics are big into crafting

Figure 32: Craft participation, by race and Hispanic origin, by type, November 2018

Connector pins vs needles

Figure 33: Participation in specific crafts, by gender, November 2018

Figure 34: Ownership/interest in tech devices, Net, by gender, May 2018

Looking toward the future

Cosplay

Figure 35: Craft participation, by generation, November 2018

Shopping for Craft Supplies

Craft retailers face challenges

Figure 36: Craft purchase location, November 2018

Specialty craft retailers can improve party supplies

Figure 37: Craft purchase location, by craft type, November 2018

Jo-Ann Stores still wins in textiles, but aiming for multicategory appeal

Figure 38: Craft purchase location, by craft type, November 2018

Specialty retailers need to hold on to younger consumers

Figure 39: Craft purchase location, by generation, November 2018

Men shop wherever local may be

Figure 40: Craft purchase location, by gender, November 2018

Figure 41: Reasons for choosing a craft retailer, by gender, November 2018

Price is the most important factor by far

Figure 42: TURF analysis – Craft supply retailer considerations, November 2018

Amazon beating craft stores on price

Figure 43: Path to purchase between Amazon and brick-and-mortar retailer, April 2018

Inspiration

A life less Pinteresting

Figure 44: Sources of project inspiration, November 2018

Instagram is becoming a more important platform

**BUY THIS
REPORT NOW**

VISIT: store.mintel.com

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

Americas +1 (312) 943 5250 | China +86 (21) 6032 7300

APAC +61 (0) 2 8284 8100 |

EMAIL: reports@mintel.com

The Arts and Crafts Consumer - US - January 2019

Report Price: £3254.83 | \$4395.00 | €3662.99

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

Figure 45: Social media usage for project inspiration, iGens and Millennials, November 2018

Magazines have value, but need to modernize

Figure 46: Usage of magazines for inspiration, by generation, November 2018

Black and Hispanic crafters browse beyond Pinterest

Figure 47: Social media inspiration sources, by race and Hispanic origin, November 2018

Craft stores need to be more personable

Figure 48: Sources of inspiration, social media vs retailers, by generation, November 2018

Figure 49: Attitudes toward companies, October 2018

Tech crafters look to varied sources for inspiration

Figure 50: Inspiration sources, by craft type, November 2018

Barriers to Crafting

Lack of interest is the primary barrier

Figure 51: Barriers to crafting, November 2018

Aw, there's nothing in that craft bag for me

Figure 52: Barriers to crafting for interested noncrafters, November 2018

Crafts aren't a hobby for the elderly

Figure 53: Interest-based reasons for not crafting, by generation, November 2018

Time is a factor for Millennials, Gen Xers

Figure 54: Reasons for not crafting, Millennials and Generation X, November 2018

Attitudes toward the Process

Millennials are into the process

Figure 55: Attitudes about the arts and crafts process, by generation, November 2018

Cheer up, young ones

Figure 56: Discouragement, by generation, November 2018

White crafters more likely to craft alone

Figure 57: Attitudes toward crafting, by race and Hispanic origin, November 2018

Appendix – Data Sources and Abbreviations

Data sources

Consumer survey data

Consumer qualitative research

Direct marketing creative

Abbreviations and terms

Abbreviations

Terms

Appendix – The Market

Figure 58: Adult craft participation in the last 12 months, 2010-18

Figure 59: Teen craft participation in the last 12 months, 2010-18

Figure 60: Kids craft participation in the last 12 months, 2010-18

**BUY THIS
REPORT NOW**

VISIT: store.mintel.com

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

Americas +1 (312) 943 5250 | China +86 (21) 6032 7300

APAC +61 (0) 2 8284 8100 |

EMAIL: reports@mintel.com