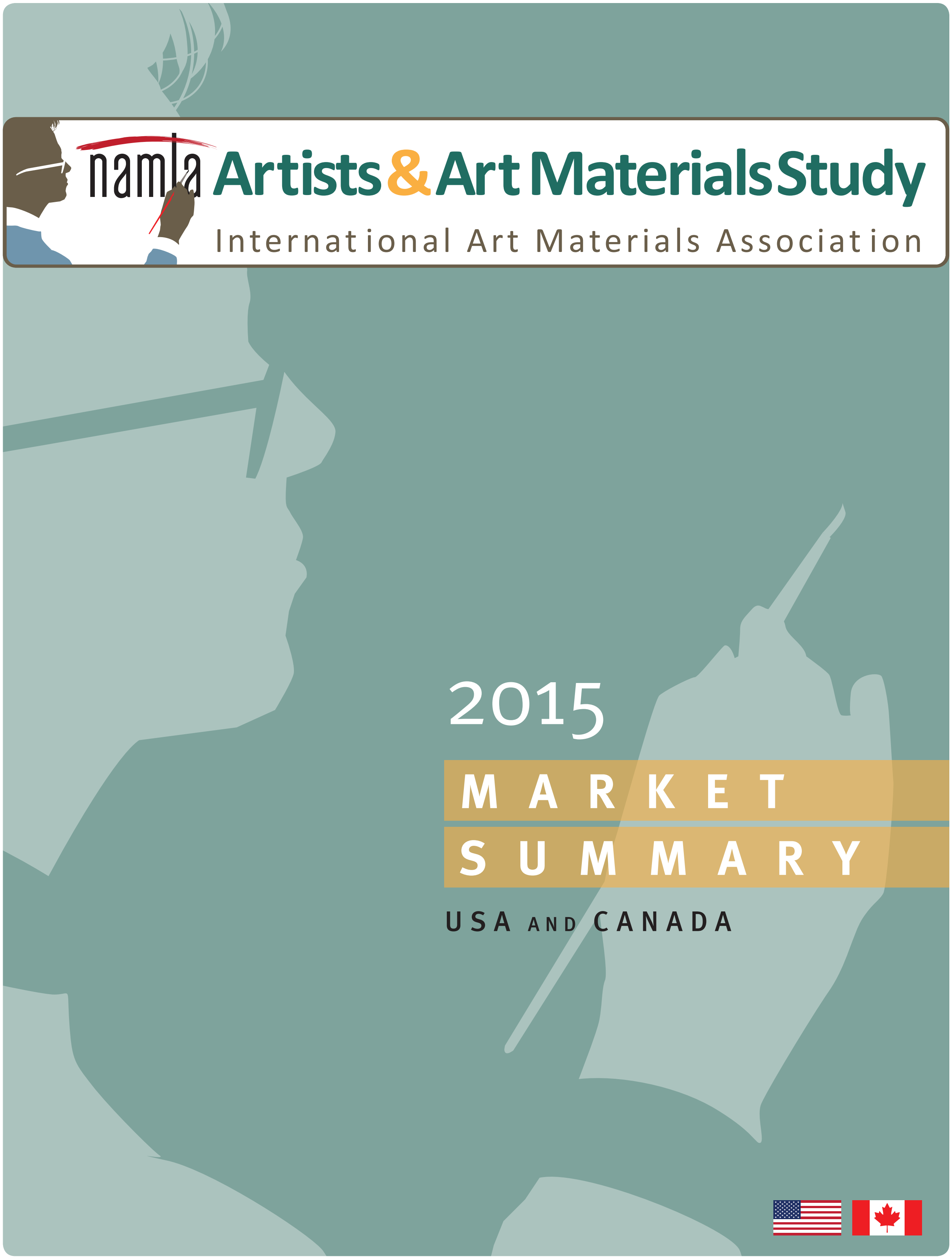


namta Artists & Art Materials Study

International Art Materials Association

2015 MARKET SUMMARY

USA AND CANADA

Introduction

NAMTA is pleased to publish the third edition of the *Artists & Art Materials Study*. This market summary will help businesses and organizations understand the importance of investing in the perennial world of art and art materials.

Methodology

This study is based on surveys of active artists and retailers, analysis of government and business data, and numerous industry interviews. The 2014–2015 online surveys gathered data from these respondents:

- 5,136 U.S. artists (December 2014)
- 879 Canadian artists (December 2014)
- 128 U.S. and 22 Canadian art materials retailers (March 2015)

Many sources posted links to the artist survey (no one source contributed more than 25% of Canadian or 16% of U.S. respondents):

- Artist-focused websites, social media, e-newsletters
- Art materials retailer websites, social media, e-newsletters
- College art department e-newsletters and social media

Sponsors

A. Franklin & Associates
Ampersand Art Supply
Blick Art Materials
Canson
Crescent Cardboard
Daler-Rowney
Escoda Sabatés
F+W Media
Faber-Castell
Fredrix Artist Canvas/Tara Materials
Gamblin Artist Colors
Global Art Materials
Golden Artist Colors
Grafix
Grimstad Comerford Group
HK Holbein
Jack Richeson & Co.
Logan Graphic Products
Princeton Artist Brush
R & F Handmade Paints
Reeves & Associates
SAMPRO-Hammer & Associates
Speedball Art Products
Strathmore Artist Papers

DEFINITIONS FOR THIS STUDY

ACTIVE ARTISTS

- Represent an enthusiast subset of anyone who created an artwork in the past year
- Usually create 10 or more artworks per year
- Read art-related content
- Shop at art supplies stores and websites
- Create a painting or drawing (nearly 90%)

ARTWORKS

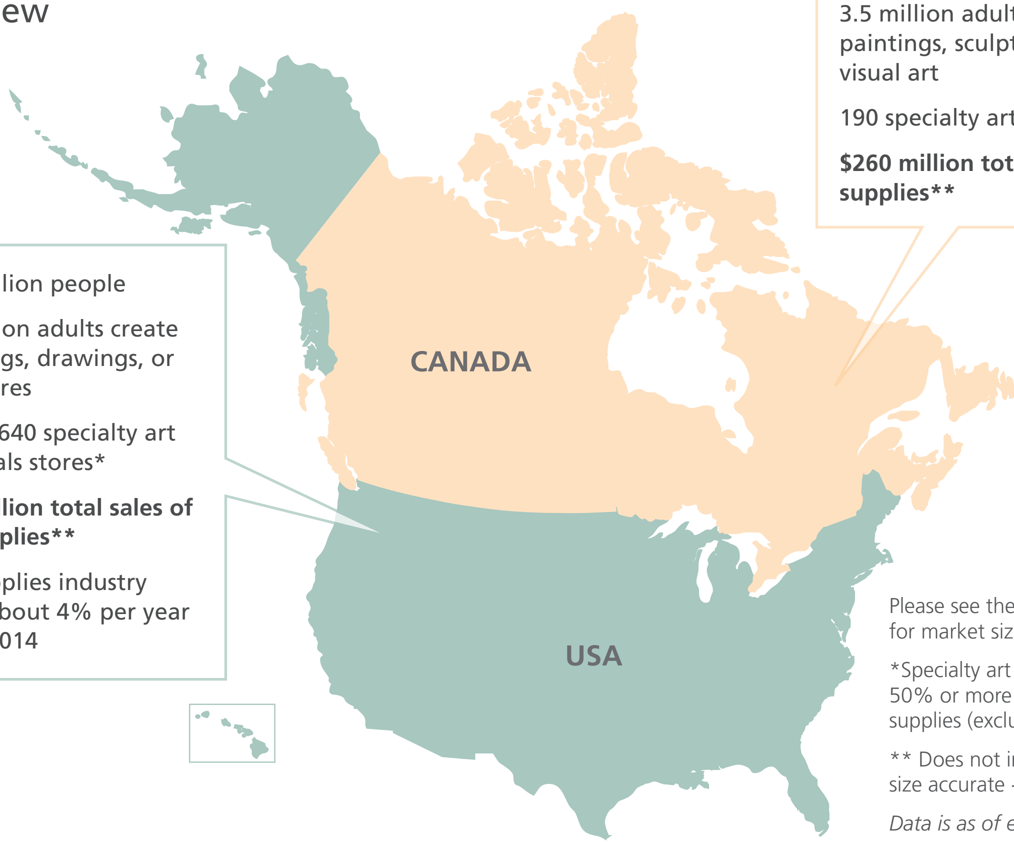
- Paintings
- Drawings
- Mixed media and collages
- Handmade books, cards, art journals
- Fiber art
- Communication art, graphic design
- Three-dimensional art
- Digital art

ART SUPPLIES

- Paints
- Drawing materials
- Brushes and other tools
- Surfaces (canvas, panels, paper, etc.)
- Easels, lighting, storage, etc.
- Content (books, magazines, digital)
- Sculpting, polymer clay, ceramics
- Other materials (metal, glass, fiber, etc.)
- Framing (included for artists but not retailers)

Market Size

Overview



36 million people

3.5 million adults create paintings, sculptures, or other visual art

190 specialty art materials stores*

$260 million total sales of art supplies**

320 million people

22 million adults create paintings, drawings, or sculptures

About 640 specialty art materials stores*

$1.5 billion total sales of art supplies**

Art supplies industry grew about 4% per year 2012–2014

Please see the appendix on pages 18–19 for market size calculations.

*Specialty art materials stores generate 50% or more of their sales from art supplies (excluding framing).

** Does not include framing. Market size accurate +/-20%.

Data is as of early 2015.

2009, 2012 and 2015 indicate the year the survey was conducted, usually early that year. Annual data, therefore, covers the prior year. For example, 2015 sales data covers the 2014 calendar year.

Retail Channels

USA

	2012	2015
Art materials stores	37%	34%
Online art materials stores	13%	14%
Crafts chain stores	34%	35%
Related retailers (framer, college, hardware, etc.)	10%	8%
Online general retailers (Amazon.com, etc.)	4%	7%
Others	2%	2%
TOTAL	**100%**	**100%**

See page 18 for background data. This data is approximate and is +/-10% because of lack of data from some key industry participants. So 34% market share for art materials stores is between 31% and 37%. Art supplies in this table do not include framing.

Canada

Art materials stores have much higher market share in Canada. Hart's rough estimates of Canadian retail channel shares are art materials stores, 58%; online art materials stores, 8%; crafts chains, 7%; related retailers, 22%; others, 5%.

Art Materials Retailers

Number of Retailers

Totals are as of early 2015.

Specialty art materials stores

These retailers gain half or more of their sales from art materials. The number of U.S. stores declined about 12% from 2012 to 2015. The U.S. Census has noted similar declines in other specialty retail sectors.

There are about 175 to 200 specialty art materials store locations in Canada, the same as in 2012. (See notes on page 19.)

U.S. art materials specialty store locations:

	2009	2012	2015
Independent stores (fewer than 10 locations)	NA	642	518
Artist & Craftsman Supply	13	18	25
Blick Art Materials	31	38	65*
Jerry's Artarama	15	16	19
Plaza Artist Materials	12	11	13
TOTAL	**NA**	**725**	**640**

Retailers with 10 or more locations in 2015 are listed. NA indicates data not available.

**Blick acquired 45 Utrecht stores in 2013.*

Related specialty stores

These retailers in the U.S. consist of about 2,050 college, book, craft, office, hardware, and other stores that are significant customers of art supplies wholesalers but art supplies are not their major business. Canada has about 400 to 500 of these kinds of stores.

Major crafts chains

Each crafts chain carries art supplies that differ in quantity and in terms of fine art versus craft brands. Michaels is thought to sell the most fine art supplies. (See notes on page 19.) The number of crafts chain locations increased 12% from 2012 to 2015.

Number of locations of major U.S. crafts chains:

	2009	2012	2015
Aaron Brothers	161	134	120
A.C. Moore Arts & Crafts	136	140	137
Hobby Lobby Stores	432	514	655
Jo-Ann	764	770	850
Michaels Stores*	1,009	1,064	1,168
TOTAL	**2,502**	**2,622**	**2,930**

Location counts are from within the first quarter of each year.

Michaels Stores included 118 locations in Canada in 2015, 89 in 2012, and an unknown number in 2009.

General merchandisers

General merchandisers are included here because some artists indicated they buy art supplies at these locations.

More retailer data is available in the *Artists & Art Materials 2015 Study: Retailer Survey Results* report at NAMTA.org/study2015.

Art Materials Retailer Sales Revenue

Data indicates that bigger retailers got bigger and many smaller retailers exited the business. About 19% of the art materials retailers in business in 2012 had gone out of business by 2015. The percentage of retailers with sales of $500,000 or less decreased from 50% to 41% from 2012 to 2015.

Percentage of surveyed U.S. **retailers** at various sales levels (including multistore retailers and online retailers):

GROSS SALES	2009	2012	2015
More than $4,000,000	—	—	13%
$2,000,001–$4,000,000	—	—	16%
$1,000,001–$2,000,000	—	—	18%
Over $1,000,000	**29%**	**28%**	**47%***
$700,001–$1,000,000	10%	9%	6%
$500,001–$700,000	11%	14%	6%
$200,001–$500,000	18%	27%	25%
$100,001–$200,000	17%	8%	6%
$100,000 or less	15%	14%	10%
TOTAL	**100%**	**100%**	**100%**
Median	**$450,000**	**$550,000**	**$800,000**

108 U.S. retailers responded to this question. A dash (—) indicates data was not calculated for that year.

Canada: *Median gross sales were C$650,000 per retailer based upon data from 21 retailers.*

**Additional sales levels are provided for the 2015 column. The same dollar ranges were used on the survey each year.*

Percentage of surveyed U.S. retailer **storefronts** at various sales levels (excluding online sales):

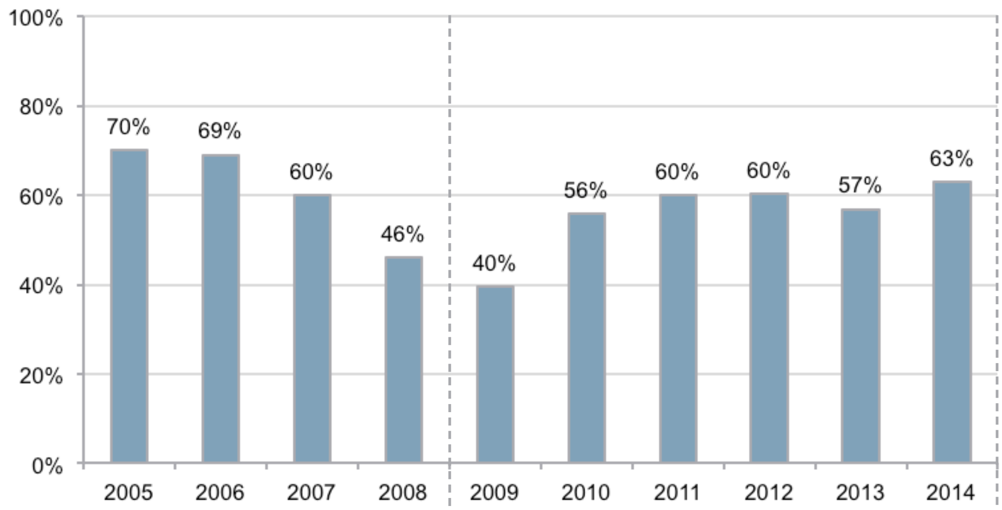
GROSS SALES	2015
More than $2,000,000	8%
$1,000,001–$2,000,000	27%
$500,001–$1,000,000	20%
$200,001–$500,000	26%
$100,001–$200,000	11%
$100,000 or less	8%
TOTAL	**100%**
Median	**$583,333**

Canada: *Median gross sales were C$450,000 per storefront.*

Art Materials Retailer Sales Growth

The recession of 2007–2009 took a bite out of the percentage of retailers reporting growth and the amount of growth.

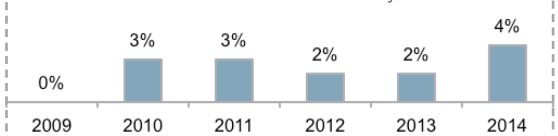
Percentage of U.S. retailers reporting an increase in sales:



Data is from the 2009, 2012, and 2015 surveys.

Median retailer sales growth:

Data from 2012 and 2015 retailer surveys.

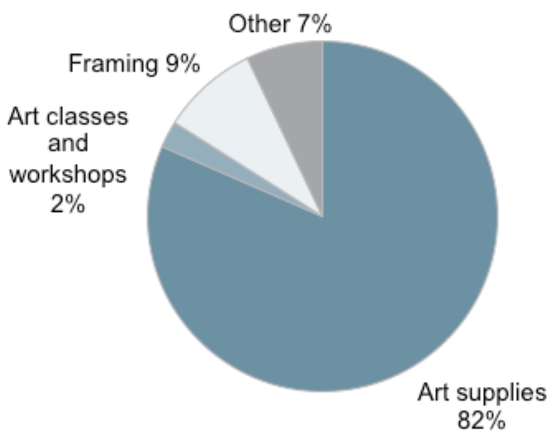


Retailer Product Trends

Sales by product category

U.S. art materials retailers operating mainly through storefronts derived 82% of their sales revenue from art supplies. Percentages per product group were about the same for 2009, 2012, and 2015. All retailers carried art supplies; 38% offered art classes and 55% offered framing.

Retailer percentage of total sales per major product category, 2015:



Art supplies sales by category

The 82% of sales from art supplies is then broken down by product category. For example, a typical retailer had annual per-storefront median sales of $583,333 in 2015. $478,333, or 82%, was from art supplies. Of that $478,333, 11.2% was from pads and paper, or $53,573.

This report provides sales/spending by product category for retailers (below) and artists (page 11). Use the following retailer table to understand sales by specialty art supplies stores. Use the artist data on page 11 to estimate market share by product category.

Percentage of U.S. art materials storefront retailers' total art supplies revenue from each category:

ART SUPPLIES CATEGORY	2009	2012	2015
Oil paints	10.1%	9.1%	12.2%
Acrylic paints	12.8%	10.8%	11.5%
Watercolors	6.8%	6.9%	8.3%
Spray paint/aerosols	—	2.4%	3.0%
Drawing materials (pencils, pastels, pens, markers, ink)	12.6%	13.1%	12.4%
Brushes	9.9%	9.3%	9.0%
Canvas products	12.1%	12.9%	12.4%
Panels, cardboard, foam boards	8.0%	6.9%	7.8%
Pads and paper	13.2%	14.6%	11.2%
Furniture, easels, lighting, projectors	4.5%	4.9%	4.8%
Portfolios and storage	5.1%	3.8%	3.6%
Books, magazines, videos	2.5%	2.6%	1.7%
Sculpting, polymer clay, ceramics	2.6%	2.8%	2.1%
TOTAL (traditional art supplies)	**100%**	**100%**	**100%**

40 U.S. retailers provided sales data per product segment for 2015. Canadian percentages were similar. A dash (—) indicates category was not tracked that year.

Product growth areas

The highest percentages of U.S. retailers reported 2015 sales growth in the categories of oil paints, acrylic paints, brushes, wet media drawing materials, canvas, and spray paint. Keep in mind if a product were carried by only a few retailers but grew for all of them, it would show up as a low percentage on this table.

Percentage of surveyed U.S. retailers indicating growth in each category:

CATEGORY	2009	2012	2015
Oil paints	42%	42%	59%
Acrylic paints	51%	52%	56%
Watercolors	29%	39%	37%
Spray paint/aerosols	—	45%	43%
Drawing materials (dry media, including pencils, pastels)	52%	49%	37%
Drawing materials (wet media, including pens, markers, ink, etc.)	—	46%	46%
Printmaking supplies	—	38%	35%
Brushes	43%	37%	48%
Canvas products	61%	39%	44%
Panels	32%	35%	31%
Cardboard, foam board	—	17%	15%
Pads and paper	43%	54%	39%
Decorative papers	—	37%	17%
Sculpting, polymer clay, ceramics	15%	17%	19%
Furniture, easels, lighting, projectors	13%	8%	9%
Portfolios and storage	16%	17%	7%
Books, magazines, videos	23%	23%	9%
Computer graphic supplies for digital art	—	7%	6%
DIY framing supplies	—	7%	15%
Framing services	30%	21%	26%
Classes and workshops	26%	32%	26%
TOTAL	**672%***	**662%**	**624%**

Total indicates retailers typically reported six categories grew.

**The 2009 total is an estimate that makes the annual totals comparable. A dash (—) indicates category was not tracked that year.*

Active Artists

Overview

Active artists by segment

Active artists are the enthusiast subset of the creative participants surveyed in studies like the Craft & Hobby Association's (CHA's) Attitude & Usage Study. Active artists spend about five times as much as creative participants. Active artists are segmented into three groups:

- **Professional artists** derive half or more of their household income from selling their own artworks.
- **Students** have taken a semester-long course in art in the past 12 months and are under age 30.
- **Recreational artists** are all others.

Key findings per U.S. segment, 2015:

KEY FINDING	PRO	STUDENT	REC
Percentage of active artists	10%	11%	79%
Age, median	55	22	58
Time spent, median hours per week	27	15	9
Most popular art forms	Acrylic, oil, watercolor paintings	Wet and dry media drawings, oil paintings	Acrylic, watercolor, oil paintings
Different forms of art created, median	5	7	5
Artworks created, median	75	59	38
Spending on art supplies, median	$1,470	$363	$745
Percentage who shopped at art supplies stores	82%	91%	81%
Use smartphone to view art resources	64%	86%	59%
Read e-newsletters about art	50%	16%	43%
Use Facebook for art	52%	44%	43%
Most popular social media for art	Facebook	Tumblr	Facebook

Artist survey conducted in December 2014. Data is for the year 2014 unless noted otherwise.

More artist data available in the *Artists & Art Materials 2015 Study: Artist Survey Results* report at NAMTA.org/study2015.

Time Spent Creating Art

Artists are spending more time creating art. U.S. artists now typically spend 10.5 hours per week, up from 8 hours in 2009 and 10 hours in 2012. Canadian artists now spend 8.6 hours per week, up from 7 hours in 2012.

Percentage of artists spending various amounts of time creating art:

TIME PER WEEK	USA 2015	CANADA 2015
More than 30 hours	12%	10%
21–30 hours	14%	11%
11–20 hours	23%	23%
6–10 hours	24%	22%
1–5 hours	23%	28%
Less than an hour	3%	6%
None	0%	0%
Median hours	**10.5**	**8.6**

Spending Patterns

Median spending per U.S. artist was highest in 2008, just before the recession, at $848, then dipped to $700 in 2011 and recovered to $750 in 2014. Keep in mind U.S. median household income peaked in 2009 and was still 3% below that in 2014. Canadian artist median spending was $700 in 2011 and has risen to $800 in 2014.

Percentage of artists reporting art supplies spending at various levels:

SPENDING LEVEL	USA 2015	CANADA 2015
More than $2,000	16%	15%
$1,001–$2,000	23%	25%
$751–$1,000	11%	13%
$501–$750	15%	15%
$401–$500	7%	7%
$301–$400	8%	7%
$201–$300	7%	8%
$101–$200	7%	7%
$100 or less	5%	3%
TOTAL	**100%**	**100%**
Median	**$750**	**$800**

Art supplies spending includes furniture, content, and framing but not classes.

Spending by Product Category

This table is an overview of artist spending. To approximate market share by fine art supplies category, use the market sizes on page 3 (such as $1.5 billion for the USA) and recalculate the following percentages without framing. U.S. category spending shares have remained steady over time except for a significant decrease in other creative materials and an increase in framing.

Percentage of artists' total spending, per category:

PRODUCT CATEGORY	USA 2009	USA 2012	USA 2015	CANADA 2012	CANADA 2015
Paints: acrylic	—	10%	8%	14%	14%
Paints: oil	—	7%	7%	5%	5%
Paints: watercolor	—	4%	4%	4%	3%
Paints: other	—	2%	3%	2%	3%
PAINTS TOTAL	**15%***	**23%**	**22%**	**25%**	**25%**
Drawing materials (pencils, pens, markers, ink, pastels, etc.)	7%	9%	7%	7%	7%
Brushes and other tools	7%	6%	6%	6%	6%
Canvas, panels, board	15%* combined	16%* combined	14%	16%* combined	17%
Paper, pads, blank books			7%		18%
Other creative materials (fabric, decorative paper, ceramics, printmaking, etc.)	13%	15%	11%	13%	10%
Furniture, easels, lighting, storage, portfolios, etc.	10%	6%	6%	6%	7%
Books, magazines, videos, digital content, software, apps	15%	9%	8%	8%	8%
Framing supplies and services	18%	16%	20%	16%	13%
All categories	**100%**	**100%**	**100%**	**100%**	**100%**

**The 2009 spending categories are not comparable with subsequent years.*

Narrower categories tend to elicit higher spending responses.

A dash (—) indicates the subcategory was not surveyed that year.

Spending by Retail Segment

This is an overview of artist-reported spending by retail segment; see page 3 for market share. The artist survey results for this question are affected by the survey being online-only, making the online spending percentage high, and the survey being promoted by art supplies stores, making the crafts chain percentage low. Use this table to understand national differences and stability of spending by channel.

Percentage of total artist spending at each type of store:

PRODUCT CATEGORY	USA 2009	USA 2012	USA 2015	CANADA 2012	CANADA 2015
Art supplies stores	33%	31%	33%	58%	57%
Crafts chain stores (Hobby Lobby, Michaels, etc.)	17%	17%	16%	11%	11%
Framers, hardware stores, or bookstores	—	10%	12%	11%	10%
Mass merchandisers (Walmart, etc.)	—	—	1%	—	2%
Online art supplies or crafts stores	29%	32%	28%	11%	14%
Online general retailers (Amazon.com, etc.)	—	5%	6%	2%	3%
Other	—	5%	4%	7%	3%
TOTAL	**NA**	**100%**	**100%**	**100%**	**100%**

Kinds of Artworks Created

Artists were most likely to have created dry media drawings, acrylic paintings, watercolors, wet media drawings, or mixed media/collages. The digital art participation rate was 16% for recreational artists and 41% for students. Types of art with significant increases in participation included oil paintings, wet media (pen, ink, markers), dry media (pencils, graphite, charcoal), and mixed media.

Percentage of artists creating each type of artwork in the past 12 months (participation rate):

TYPE OF ART	USA 2009	USA 2012	USA 2015	CANADA 2015
Oil paintings	29%	30%	34%	25%
Acrylic paintings	42%	51%	50%	64%
Watercolors	44%	45%	46%	49%
Any paintings	**69%**	**77%**	**81%**	**86%**
Pastel drawings	27%	23%	23%	21%
Colored pencil drawings	—	34%	31%	29%
Drawings using pencils, graphite, charcoal	—	51%	55%	54%
Drawings using pen, ink, markers	—	40%	44%	44%
Any paintings or drawings	**82%**	**91%**	**92%**	**94%**
Murals, wall art, graffiti	17%	10%	9%	9%
Mixed media or collages	55%*	40%	44%	46%
Handmade books, cards, art journal pages	52%*	34%	35%	35%
Functional art (painting or drawing on furniture, kitchen items, etc.)	31%*	19%	18%	18%
Three-dimensional art (sculpture, ceramics, found objects, etc.)	43%*	27%	27%	25%
Fiber art, quilts, fabric art	—	23%	20%	21%
Any murals, mixed, handmade, functional, 3-D, fiber (Six categories)	**77%***	**71%**	**73%**	**74%**
Communication art or graphic design	21%	19%	18%	15%
Digital paintings or drawings using a tablet or mouse	24%	17%	19%	16%
Any type of artworks	**100%**	**100%**	**100%**	**100%**

A dash (—) indicates the material was mentioned by fewer than 3% of respondents.

**The 2009 artist survey had significantly more respondents from quilting, mixed media, and fiber arts websites.*

The number of artworks produced by artists in the USA and Canada increased significantly from 2012 to 2015. The segments that drove this increase included paintings and drawings in general and handmade books/cards/art journal pages. An example of how to interpret these tables is as follows: 18% of Canadian artists created functional art, typically three works.

Median number of artworks produced by participants in each segment:

TYPE OF ART	USA 2009	USA 2012	USA 2015	CANADA 2015
Oil paintings	6	6	6	5
Acrylic paintings	5	5	6	8
Watercolors	6	5	6	6
Any paintings	**11**	**10**	**12**	**12**
Pastel drawings	4	4	4	3
Colored pencil drawings	—	4	5	5
Drawings using pencils, graphite, charcoal	—	10	10	10
Drawings using pen, ink, markers	—	10	10	10
Any paintings or drawings	**22**	**24**	**27**	**26**
Murals, wall art, graffiti	3	2	2	2
Mixed media or collages	6	5	5	5
Handmade books, cards, art journal pages	10	6	10	10
Functional art (painting or drawing on furniture, kitchen items, etc.)	3	3	3	3
Three-dimensional art (sculpture, ceramics, found objects, etc.)	5	5	5	4
Fiber art, quilts, fabric art	—	5	4	4
Any murals, mixed, handmade, functional, 3-D, fiber (Six categories)	**15**	**12**	**13**	**11**
Communication art or graphic design	8	10	8	7
Digital paintings or drawings using a tablet or mouse	10	9	7	5.5
Any type of artworks	**43**	**39**	**43**	**41**

A dash (—) indicates the material was mentioned by fewer than 3% of respondents.

Materials Used

Participation rates

U.S. and Canadian artists reported using significantly more types of media and surfaces in 2015 than 2012. Canadian artists were more likely to use acrylic paint and stretched canvas. U.S. usage grew by five points or more for adhesives, drawing pencils, graphite, and wood/conservation panels. Artists typically used five mediums.

Percentage of each USA 2015 segment using these in the past year:

MEDIUMS	PRO	STUDENT	REC
Oil paint	39%	36%	33%
Acrylic paint	58%	62%	57%
Watercolors	46%	49%	48%
Gouache	23%	22%	19%
Tempera	4%	9%	4%
Encaustics	12%	2%	8%
Spray paint	15%	26%	11%
Pastels (soft)	23%	27%	23%
Pastels (oil or wax)	12%	17%	13%
Colored pencils	33%	51%	39%
Drawing pencils	48%	72%	50%
Sketching charcoal	25%	54%	25%
Graphite	32%	54%	30%
Pen and ink (drawing and calligraphy)	39%	71%	39%
Markers	27%	46%	28%
Other (inks, clay, fabric, etc.)	31%	18%	25%

SURFACES, MATERIALS, TOOLS	PRO	STUDENT	REC
Paper (loose, sketch book, tablet)	77%	93%	81%
Blank books or cards	24%	28%	32%
Decorative paper or collage materials	32%	34%	34%
Canvas (stretched)	59%	58%	57%
Panels (wood or conservation)	49%	34%	36%
Panels (canvas-wrapped or cardboard)	27%	24%	27%
Plastic film	7%	9%	7%
Found objects	32%	41%	32%
Ceramics	10%	16%	7%
Wood, metal, plastic, or other formed materials	32%	42%	25%
Fiber or fabric	23%	31%	26%
Adhesives/glue	44%	51%	42%
Graphics or animation software	19%	34%	11%
Computer	45%	58%	34%
Smartphone	16%	20%	13%
Scanner	29%	40%	23%
Printer	43%	44%	37%
Camera	44%	53%	42%
Digital drawing tablet or iPad	20%	27%	14%

Materials artists want to try

U.S. and Canadian artists have nearly identical lists of desired materials to try. The following materials have received increasing mentions since 2009 and 2012: watercolors, encaustics, and markers. These answers came directly from nearly 5,000 artists in this fill-in-the-blank question. If this had been a checklist, the percentages would be much higher.

Top 15 answers for artists, in order of frequency of mention:

	USA 2015	CANADA 2015
Watercolors	13%	13%
Encaustics	11%	13%
Oil paint	10%	11%
Pastels	9%	7%
Acrylic paint	7%	9%
Markers	6%	6%
Inks	5%	5%
Clay, ceramic (not polymer)	5%	5%
Wood	5%	5%
Fiber, fabric	4%	5%
Gouache	4%	4%
Screen printing, silkscreen, printmaking	4%	—
Digital drawing, digital other	3%	—
Pens	3%	4%
Metal, metallic paints, flakes	3%	3%
Panels	—	3%
Canvas	—	3%

The above counts include synonyms and word variants. A dash (—) indicates the material was mentioned by fewer than 3% of respondents.

Social Media

Print and digital media context

Artists continue to use books and magazines alongside digital resources for art. Canadian artists' content habits were nearly all within a few percentage points of U.S. recreational artists. This question did not ask about Tumblr, which students indicated was more popular than Facebook for art.

Percentage of artists regularly looking at these kinds of resources regarding art:

	PRO	STUDENT	REC
Books	78%	64%	75%
Individual artists' websites or blogs*	77%	74%	73%
Magazines	70%	47%	69%
Search engines (Google, etc.)	61%	63%	57%
Google Images	55%	70%	48%
Gallery or museum websites	59%	50%	49%
YouTube	43%	40%	46%
Facebook	52%	44%	43%
E-newsletters	50%	16%	43%
Pinterest	37%	41%	36%
Brand or manufacturer websites	40%	15%	36%
Retailer websites	38%	16%	36%
Online art communities (DeviantArt, Wet Canvas, etc.)	36%	40%	34%
E-learning websites	16%	7%	20%
Instagram	20%	45%	12%
Smartphone apps	14%	25%	13%
Flickr	9%	8%	6%
Snapchat	1%	6%	1%

**Individual artists' websites or blogs include social media feeds, pages, and posts.*

Popular sites

Artists look at these sites regarding art (ranked by % of artists mentioning):

PRO	STUDENT	REC
#1. Facebook	**#1. Tumblr**	**#1. Facebook**
#2. Pinterest	#2. DeviantArt	**#2. YouTube**
#3. YouTube	#3. Facebook #3. Instagram #3. YouTube	**#3. Pinterest**
#4. Wet Canvas	#4. Pinterest	#4. Wet Canvas

This was an open-field question. Same rankings indicate same frequency of mention. The sites in bold are viewed significantly more often than the other sites.

What artists want versus what retailers post

Artists want a wide range of content from their favorite art materials retailers. Many retailers, however, only post sales and new product announcements. Retailers can attract bigger audiences with a wider range of content.

Percentage of U.S. artists wanting each content type from retailers and percentage of U.S. retailers posting this content on social media, 2015:

CONTENT TYPE	ARTISTS WANT	RETAILERS POST
Announcements of sales or special offers	62%	87%
Artworks by other artists	59%	59%
How-to videos	57%	30%
New product announcements	57%	84%
Quick tips and ideas	55%	35%
Product demo videos	54%	39%
Product reviews	54%	23%
Community art events	53%	60%
How-to articles	45%	23%
Contests	37%	29%
Artist profiles	37%	23%
Book reviews	27%	4%
Inspiring quotes or photos	24%	43%
Funny stuff	12%	25%
Quizzes and questions	9%	9%

Darker blue indicates higher percentages.

Impact of Digital Tools on Art Output

Artists using digital tools and media produce more art using traditional materials than those who do not. Those who looked at Facebook regularly regarding art, used computers to help create art, or used a digital drawing tablet or iPad created more art than those who did not (36%, 44%, and 62% more, respectively). They created more paintings, drawings, mixed media, and other art forms, with the exception of computer users creating fewer paintings. Users of digital drawing tablets or iPads for art created significantly more drawings using wet media (pen, ink, markers) and dry media (pencils, graphite, charcoal).

Reintroducing Older People to Art

44% of U.S. and Canadian recreational artists reported having stopped doing art at some point in their lives, usually because of career or family demands. They typically get back to art in their 40s, 50s, and 60s. What most often helps them get started again? Classes! Retailers should make sure their communities offer art classes for adults.

What helped returning artists get started again:

RESOURCE	USA 2015	CANADA 2015
Local art class (at school, museum, studio, etc.)	45%	45%
Friends	37%	40%
Books	32%	37%
Magazines	26%	27%
Online how-to tutorials and videos	24%	30%
Relatives	24%	21%
Art museum or gallery	19%	16%
Nothing, just on my own	18%	19%
Art supplies store staff	17%	26%
Social media (Facebook, Pinterest, etc.)	15%	17%
Other (spouse, therapist, etc.)	15%	14%
Online class	9%	13%
TOTAL	**282%**	**306%**

Totals indicate artists usually are helped by about three different resources.

Appendix: Market Size Background Data

See page 3 for U.S. and Canadian market sizes.

Number of Artists

The U.S. Census Survey of Public Participation in the Arts (SPPA) indicated about 9% of U.S. adults (age 18+) created a "painting, drawing, or sculpture" in 1992, 2002, and 2008. The 2012 SPPA data for visual art is not comparable to previous years; the 2012 survey wording left out drawing and positioned the question of visual art creation as an "other" to videos and photos. 76.7% of the 2014 population is age 18 or older.

The Statistics Canada General Social Survey for 1992 and 1998 noted 12% of Canadian adults "reported pursuing visual art activities such as painting and sculpting," not including photography or crafts. The question was discontinued after 1998. The fine art participation percentages have been stable in both Canada and the USA over time, so Hart applied the 12% to the 2015 adult population (age 18+) of 29 million for a current estimate. The 2012 Arts and Heritage in Canada: Access and Availability Survey indicated 10% of Canadian adults were involved in visual arts (visual art or fine craft, such as pottery, ceramics, leatherwork, and weaving). This leaves out painting and drawing, which have much higher participation rates than these niche crafts, so 12% is still reasonable.

Retail Sales of Art Supplies

The U.S. estimate of $1.5 billion (accurate +/-20%) is based upon reported growth from major art materials retailers and suppliers. The industry grew 3%, 5%, and 6%, respectively, in the past three years. If that is applied to the 2011 total of $1,302,000,000, the 2014 rounded total is then $1,493,000,000.

The Canadian estimate of $260 million is calculated by taking the 2012 total of $225 million and using the same three-year growth rates as for the U.S. (3%, 5%, 6%). The Canadian market is then 17% of the size of the U.S. market, same as in 2012. The number of artists in Canada is 16% of the U.S. Median artist spending was $800 in Canada versus $750 in the USA. This drives the market size ratio above the artist ratio. Major Canadian retailers and suppliers did not provide growth data for a more accurate estimate.

Retail Channel Market Shares

This data is approximate. Major crafts chains, online retailers, and art supplies stores did not provide reliable data per business. The % changes from 2012 to 2015 reflect the following known data:

- Art supplies stores (independents and chains) segment decreased about 15% from 2012 to 2014, based upon survey data, confidential interviews, net 12% of stores closing, and continuing art supplies stores growth of about 11% from 2011 to 2014.
- Online art supplies stores reported growth.
- The U.S. Census reports e-commerce sales increased from 3.7% of retail sales in 2008 to 6.6% in 2014.
- Number of crafts chain locations increased 12%. Crafts chain growth varied significantly with art materials. The rumored best, Michaels, reported net sales across all craft/art categories grew 12% from 2011 to 2014. Crafts chain locations overall increased 11%. No indications from suppliers that crafts chain sales of fine art supplies per store increased.
- Number of related retailers likely decreased 10% to 15%, according to the U.S. Census. College stores are selling significantly less art materials than a few years ago.
- Amazon sales of art materials are thought to have increased significantly.
- Artists reported spending similar percentages per retail channel for 2009, 2012, and 2015.

Industry Growth

The following table provides data from 85 U.S. art materials retailers that completed the 2015 retailer survey questions regarding growth, confidential interviews with five of the largest U.S. art materials retailers, and confidential interviews with six of the largest fine art materials suppliers. The Hart consensus estimate is an average of those three percentages per year. Canadian industry growth data is not available.

In comparison, Michaels Stores, Inc. a crafts chain with an estimated 5% to 10% of sales from art supplies, reported comparable store sales growth of 1.7% in 2014, 2.9% in 2013, and 1.5% in 2012.

Reported growth by U.S. art materials businesses:

	2012	2013	2014
Median growth of 85 art materials retailers	2%	2%	4%
Weighted average growth of five of the largest retailers	5%	5%	7%
Weighted average growth of six of the largest suppliers	3%	5%	6%
Hart consensus estimate	**3%**	**5%**	**6%**

Number of Specialty Art Materials Stores

These totals include only stores selling at least 50% art supplies (not including framing or classes). The number of specialty art materials stores (about 640 in the USA and 175 to 200 in Canada) is from a 2015 Hart census of retailers based upon mailing lists from major art materials wholesalers and NAMTA prospects lists, retailer websites, and phone calls to verify what retailers sold and whether they were still in business. Hart checked the 2012 U.S. list and determined 19% of the stores on that list had closed by 2015; the 2012 number of stores was 725. Some new stores have opened, but not many. The number of Canadian stores remained stable from 2012 to 2015.

Number of Related Specialty Stores

The 2012 total was 2,500 that sell some art materials. The U.S. Economic Census indicates the number of retail establishments/locations decreased from 2007 to 2012 in many sectors that sell art supplies: hobby, toy, and game stores (NAICS 451120, includes craft supplies), 12%; bookstores, 28%; and hardware, 6%. Hart estimates the number of related specialty stores decreased by about 18%, to 2,050.

Number of Major Crafts Chains

These totals are from sometime in the first quarter of each year. Data are from the Michaels Stores 10-K reports, store counts on Aggdata.com, and website store locators.

Additional Data: Students

Hart estimates 252,000 university students in the USA were majoring in fine art in 2014–2015. National Center for Education Statistics (NCES) data for 2011–2012 (latest available) shows postsecondary enrollment for those majoring in visual and performing arts was 944,000. The number of bachelor's, master's, and doctor's degrees awarded in visual and performing arts was 114,456 in 2011–2012. 26% of those degrees were in fine arts (fine arts and art studies minus art history and arts management). So, 26% of 944,000 is 245,000 in 2011–2012. Growth averaged 1% per year in fine arts and art studies degrees awarded 2006–2012. So 1.03 times 245,000 is 252,350.

2015, 2012, and 2009 Study Comparison

The 2009 market size estimate is not comparable. The 2009 study had relatively more fiber arts and mixed media respondents. The 2012 and 2015 studies are fully comparable. Similar sources provided artist survey respondents.

More Information

Please visit NAMTA.org/Study2015 for the 2015 *Artist Survey Results, Retailer Survey Results, Study Highlights* presentation, and the 2009 and 2012 studies. Each study addresses different key topics such as retailer financial benchmarks and feedback for suppliers, and artist motivations, styles, learning sources, and other creative activities.