

EMBROIDERY Summary of Findings

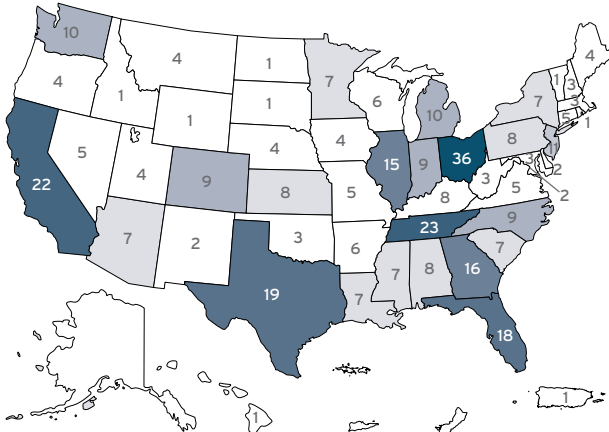
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PRINTWEAR
NNEP

For the purpose of this survey, commercial embroidery businesses are defined as those shops and individuals that offer customized embroidery services. This survey was delivered via email in August of 2018 to **18,437** subscribers of *Printwear* magazine. The survey was also included in an electronic newsletter delivered in July under the publication title, and an additional email from National Network of Embroidery Professionals (NNEP) in the same time period. Based on the August 2018 Certified Audience Statement for *Printwear* magazine, 59% of subscribers select embroidery as an area of business activity.

SURVEY RESPONDENT COMPOSITION

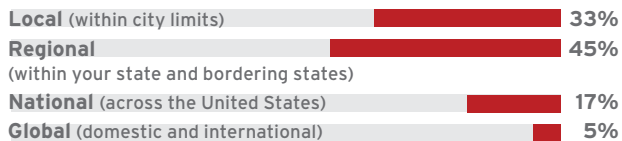
Businesses participating in the survey were primarily located in the U.S. and ranged in size and focus.



*8 respondents were from outside the US

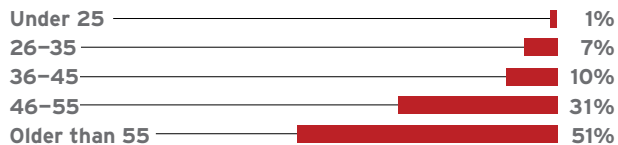
78% of survey respondents said they primarily serve their local or regional geographic area.

Primary Geographic Area Served:



The majority of survey respondents (82%) were at least 36 years old, and only 8% were 35 or younger.

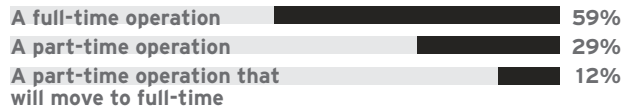
Survey Respondent Age Bracket:



91% of survey respondents indicated that *some portion of their business is directly related to embroidery*

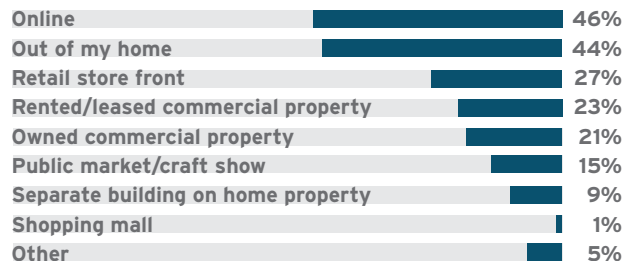
The survey indicated that the number of full-time commercial embroidery shops is greater than the number of part-time shops.

Full-Time vs. Part-Time:



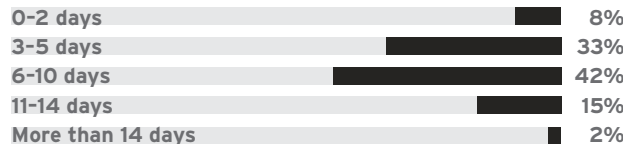
The majority of shops (46%) operate online.

Where Commercial Embroidery Shops Operate:



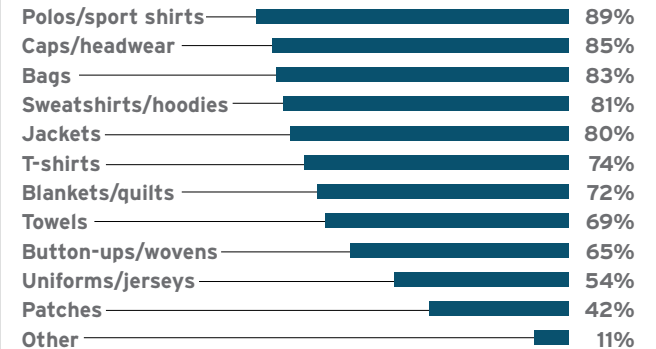
The survey indicated that the majority (83%) of shops have an average quote-to-finish time of 10 days or less.

Average Quote-to-Finish Times:



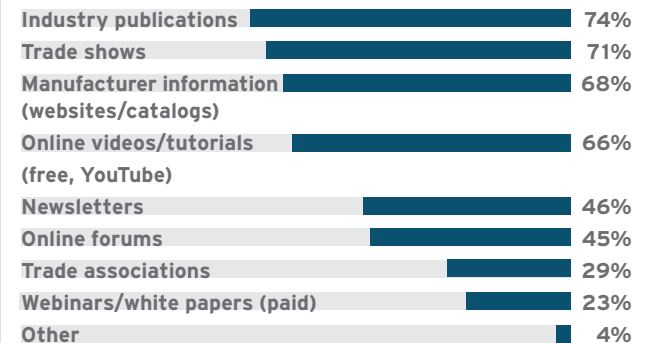
Polos/sport shirts and caps/headwear topped the list of products that commercial embroidery shops sell.

Products Embroidered to Sell:



74% of shops use industry publications as their resource for continued product knowledge and education, followed closely by trade shows.

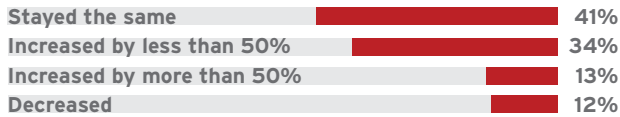
Resources Used for Product Knowledge and Education:



REVENUES AND OUTLOOK

88% of respondents reported that sales in the last 12 months have either stayed the same or increased.

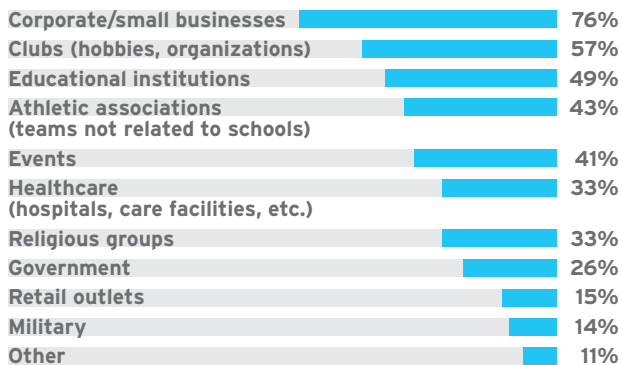
Sales in Last 12 Months for Embroidery:



71% of respondents have a positive general outlook for their commercial embroidery business

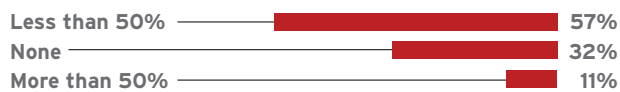
The majority of commercial embroidery shops are selling to corporate/small business (76%) and clubs (57%).

Top Market Segments for Commercial Embroidery:



68% reported that monogramming accounted for some portion of their commercial embroidery business.

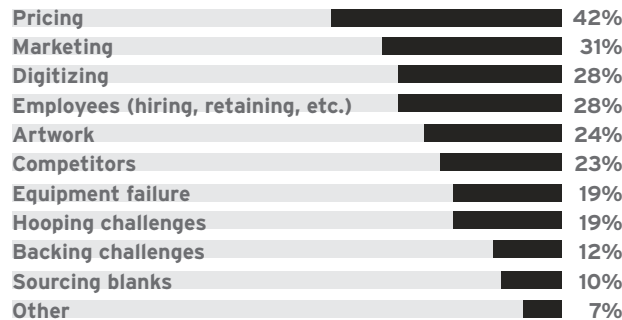
Monogramming Completed in Commercial Embroidery Shops:



37% of commercial embroidery shops produce contract/wholesale embroidery work for other decorators

The survey indicated that pricing was the greatest challenge in their commercial embroidery business.

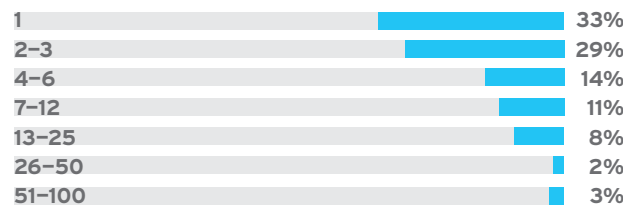
Greatest Challenges in Commercial Embroidery:



EQUIPMENT INFORMATION

The majority of respondents (62%) operate 3 or fewer embroidery heads (not needles) in their commercial business.

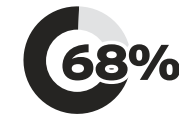
Total Embroidery Heads Currently Operating:



83% of respondents use single-head embroidery equipment



36% of respondents use multi-head embroidery equipment



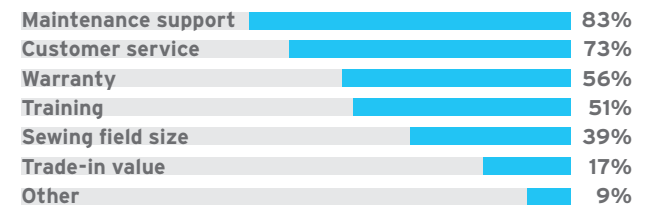
68% of respondents indicate that brand loyalty is important when purchasing embroidery equipment



50% of respondents have purchased used equipment in the past

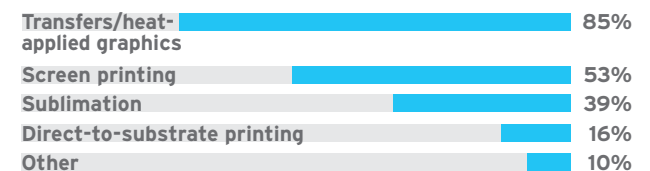
Survey respondents indicate that maintenance support and customer service are the top factors when considering the purchase of embroidery equipment.

Equipment Purchase Considerations:



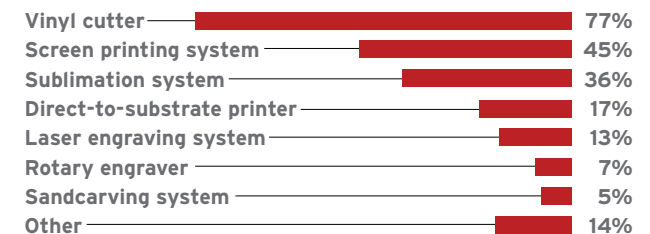
The survey indicated that respondents use transfers/heat-applied graphics most as an additional decorating technique to embroidery.

Additional Decorating Techniques Used with Embroidery:



The majority of survey respondents (77%) report using a vinyl cutter in addition to their embroidery equipment.

Additional Decorating Equipment Used:



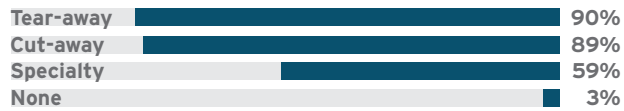


of respondents use specialty machines such as appliqué, chenille, laser bridge/etching, sequin and spangle

EMBROIDERY SUPPLIES AND TOOLS

When using stabilizers/backing, most shops indicate using tear-away and cut-away most frequently.

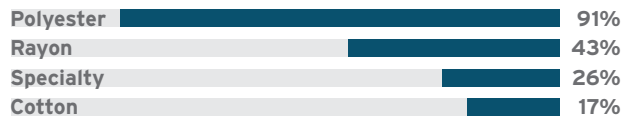
Types of Stabilizers/Backing Used Most:



THREADS AND DIGITIZING

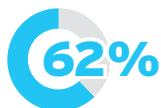
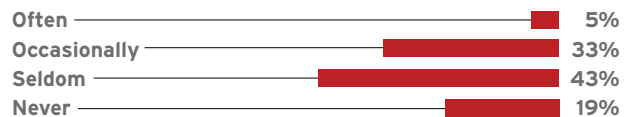
The majority of respondents (91%) use polyester thread for their commercial embroidery business.

Preferred Thread Type:



81% of respondents use metallic thread in their commercial embroidery business.

Metallic Thread Usage for Embroidery:



of survey respondents outsource digitizing work for their commercial embroidery business

ONLINE ACTIVITY

The survey indicated that of those shops with websites, 33% of them saw an increase in sales due to website activity in the past 12 months.

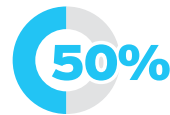


of survey respondents did not see an increase due to website activity in the past 12 months



of survey respondents do not have a website

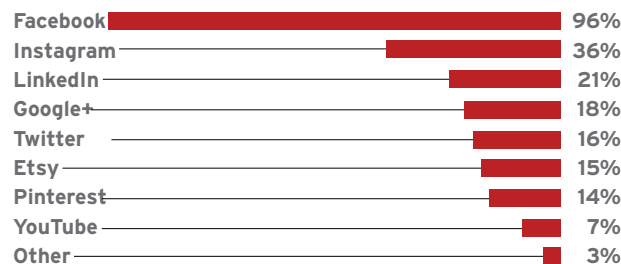
Half of those that use social media reported an increase in sales due to their social media presence.



of survey respondents stated they noticed an increase in sales due to social media presence

Of those that actively manage social media channels for business, 96% reported using Facebook for their business.

Social Media Channels Actively Managed for Business:



of survey respondents do not use social media for business

SURVEY METHODOLOGY

This survey was conducted via electronic mail through SurveyMonkey.com and complied with all CAN-SPAM act laws and the NBM privacy policy as found here <http://www.nbm.com/privacy-statement>. Respondents were selected from the *Printwear* subscriber and NNEP databases. All survey recipients were provided the same version of the survey. A total of 494 responses were received and no less than 131 responses were received on any one question. Some survey totals equal more than 100% because readers check all of the categories that apply.

All statistics and statements found in this report are based upon survey findings except where noted.

Published: November 2018

This survey was conducted in July/August 2018 and included verified businesses and subscribers of *Printwear* magazine and NNEP. These businesses are primarily involved in apparel decoration, including embroidery, screen printing, heat transfers, direct-to-substrate and sublimation. For more information regarding this survey information, please contact:

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