

CK MEDIA

2007 NATIONAL SURVEY OF

SCRAPBOOKING IN AMERICA

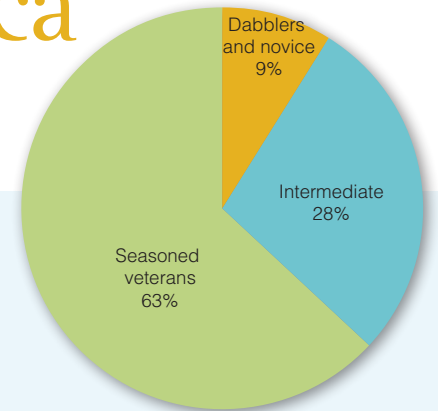
EXECUTIVE SUMMARY

A Benchmark Study
of the Scrapbooking
industry sponsored by
CK Media, the publishers of
Creating Keepsakes,
Papercrafts,
Simple Scrapbooks,
Digital Scrapbooking and
Craftrends magazines.

Scrapbooking in America Survey Highlights

Size of the U.S. Scrapbooking Market

The industry continues to grow with 29.4 percent of U.S. households reporting one or more people over the age of 18 participating in the hobby of scrapbooking or memory books in the past 12 months. These 32.6 million households spend an average of \$87.81 annually on scrapbooking supplies, representing an industry of more than \$2.87 billion.



MARKET SEGMENTS

Objective

The purpose of the Scrapbooking in America study is to assess size and value of the scrapbooking industry and to identify and profile key market segments. The profile can be utilized in strategic marketing efforts to specific segments of the scrapbooking population. The study was sponsored by CK Media, the publishers of *Creating Keepsakes* magazine, *Papercrafts*, *Simple Scrapbooks*, *Digital Scrapbooking* and *Craftrends* magazines.

Methodology

Phase One of the study was conducted by the nationally recognized market information group, TNS Global. CK Media used the TNS online 6th dimension panel with over one million U.S. households in its interactive sample and about three million individuals represented within those households. The size of the TNS 6th Dimension panel allows them to select extremely large samples that are representative of the U.S. online population, the U.S. population, or some specific demographic subset. Online panel surveys were conducted June through August, 2007 with 3,000 complete and qualified surveys represented in the data.

It is important to note that methodology differs significantly between Phase One and Phase Two of the Scrapbooking in America study. Phase One represents a general sampling of all American households and Phase Two is targeted to represent scrapbooking enthusiasts.

Phase Two of the survey was conducted by Volt Marketing. Respondents took either an online or mail survey and were sampled using one of three methods: 1) E-mail targeted to a sample of 5,000 crafters and scrapbookers, 2) Mail surveys sent out to a sample of 5,000 crafters and scrapbookers, or 3) Online recruitment using a pre-selected group of websites. After incomplete and outlier responses were removed, there were 3,218 survey responses registered from both the mail and Internet.

Phase One — Industry Tracker

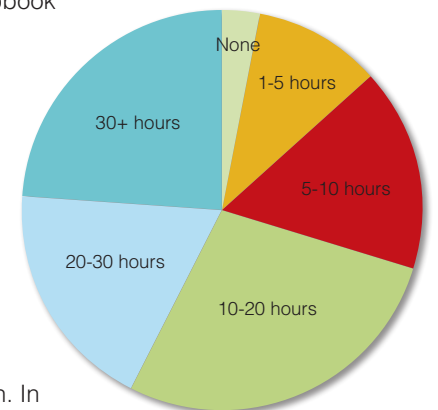
- The scrapbooking industry has surpassed \$2.87 billion. In the past 3 years the industry has expanded by 12.7 percent with a 24.4 percent increase in the number of households that scrapbook.
- Survey results indicate that 29.4 percent of households have participated in the hobby of scrapbooking in the past 12 months. In 2004, a total of 24.5 percent of households were involved in scrapbooking and in 2001 that number was 20.7 percent.

Phase Two — Scrapbooking Enthusiasts Scrapbooker Profile

- 50 percent of scrapbookers consider themselves addicts
- The #1 scrapbooking need is more space to organize supplies and work on projects
- 61 percent have spent more than \$50 on scrapbooking products in the past 30 days
- The median value of all the scrapbooking items a scrapbooker owns is \$2,006. That is up from \$1,853 in 2004
- 78 percent have a space in their home dedicated to scrapbooking

Scrapbooking Style

- The most common scrapbook design styles are clean and simple or bold and bright. But over half of scrapbookers (especially more advanced scrapbookers) say they vary their styles regularly.
- On average, scrapbookers worked on 4.39 albums in the past month. In 2004 the average was 3.2.

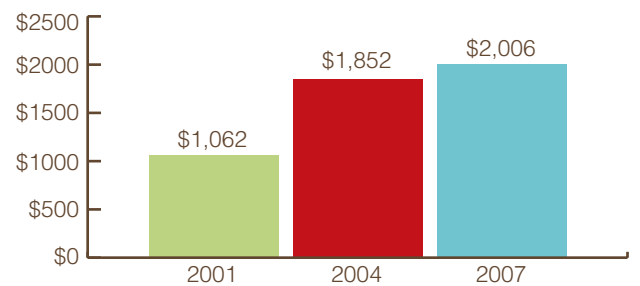


MONTHLY PARTICIPATION

- The most common scrapbook album themes are vacation, gift and baby

Scrapbooking Resources

- Magazines and online are the preferred sources overall for scrapbooking content
- 76 percent prefer to learn about new scrapbook techniques from a magazine
- The three most popular scrapbooking magazines are *Creating Keepsakes*, *Simple Scrapbooks* and *Scrapbooks Etc.*
- 35 percent have spent at least 5 hours reading scrapbooking magazines in the past 30 days



AVERAGE VALUE OF SCRAPBOOKING SUPPLIES OWNED

Scrapbooking Tools and Supplies

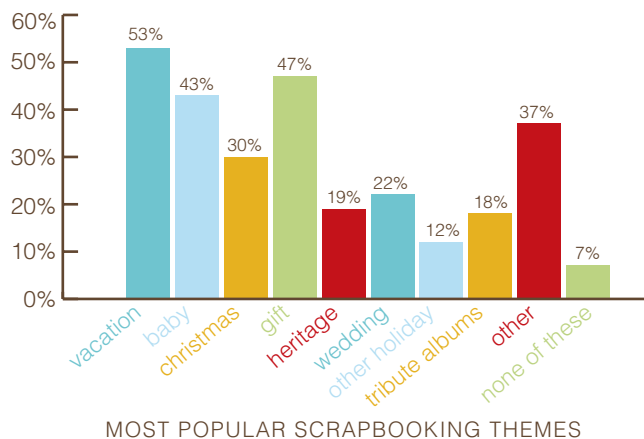
- Organizational products are the products that show the biggest jump in purchase intent. In 2004, 49 percent said they planned to buy organizational products within the next 12 months. In 2007 that increased to 62 percent
- The most common purchase driver of a scrapbooking product is whether it fits with a particular project need

Photography and Film

- 70 percent say they take many more pictures since they started scrapbooking
- 84 percent use computer software and/or a print device to make reprints or enlargements. That is up from 45 percent from the 2004 study
- Scrapbookers take 86 percent of photographs with a digital camera
- 95 percent own a digital camera
- 66 percent own photo editing software

Scrapbooking with a PC

- 87 percent of scrapbookers sometimes or always use their PC to scrapbook
- 55 percent have viewed video online about scrapbooking in the past 12 months
- The most popular ways to use the PC for scrapbooking are journaling and titles



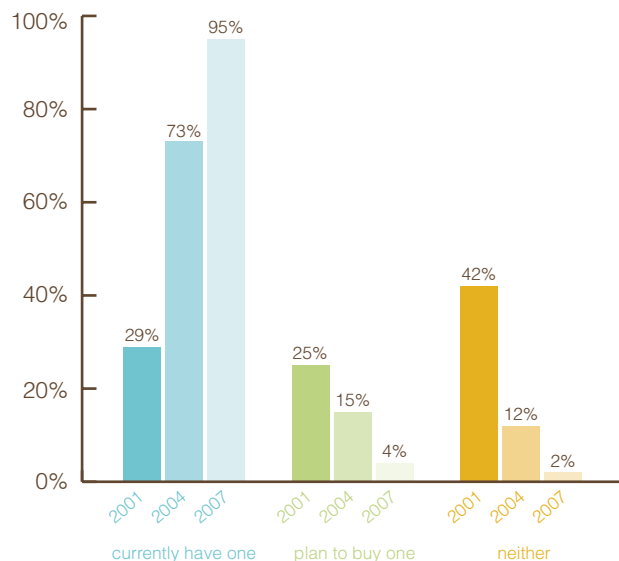
MOST POPULAR SCRAPBOOKING THEMES

Scrapbooking Classes and Workshops

- 33 percent have attended at least 3 classes in the past 12 months
- The most popular reasons to attend a scrapbook class are to learn new techniques and to learn about new products and tools
- The most common places to attend a scrapbook class are in a specialty store or at a friend's house

Personal Profile

- 55 percent of scrapbookers have graduated from college or better
- 20 percent of scrapbookers are full-time homemakers and 51 percent are employed full-time
- The most common hobbies besides scrapbooking are rubber stamping, cooking and home décor
- The most common leisure activities besides scrapbooking are leisure reading and photography



DIGITAL CAMERA OWNERSHIP

Phase Three — Market Segment Report

Novice and dabbler scrapbookers

- Most have been scrapbooking for 1-2 years
- 51 percent have influenced someone else to start scrapbooking
- Are more likely than dedicated scrapbookers to scrapbook as a way to capture their family history
- Most have spent between 1 and 5 hours scrapbooking in the past 30 days
- 82 percent plan to spend more time scrapbooking in the future
- 38 percent have used their computer to make a paper layout in the last 12 months
- 24 percent have made an all-digital layout in the past 12 months
- In the past 6 months, they have worked on an average of 2.5 albums
- On average, the total value of their scrapbooking tools and supplies is \$1,292

Intermediate Scrapbookers

- Most have been scrapbooking between 5 and 10 years
- 75 percent have directly influenced someone else to start scrapbooking
- Most have spent between 10 and 20 hours scrapbooking in the past 30 days
- 47 percent have used their computer to make a paper layout in the last 12 months
- 19 percent have made an all-digital layout in the past 12 months
- Intermediate and dedicated scrapbookers are more likely to alter digital pictures than novices
- In the past 6 months, they have worked on an average of 3.5 albums
- On average, the total value of their scrapbooking tools and supplies is \$2,358

Dedicated Scrapbookers

- Most have been scrapbooking between 5 and 10 years
- Are more likely than novice and intermediate scrapbookers to regularly vary their scrapbooking style
- 88 percent have influenced someone else to start scrapbooking
- 86 percent have a room or space in their home dedicated to scrapbooking. This is more often than novices or intermediates.
- 61 percent have used their computer to make a paper layout in the last 12 months
- 22 percent have made an all-digital layout in the past 12 months
- 57 percent spend over 6 hours per week looking at scrapbooking information on the internet
- In the past 6 months, they have worked on an average of 4.9 albums
- On average, the total value of their scrapbooking tools and supplies is \$4,312

Scrapbooking in America™

Detailed Report

This Executive Summary is just a highlight of an extensive report providing detailed narrative, charts and data. The detailed report taking a comprehensive look at the growth of the scrapbooking industry from 2001 to 2007 is also available. This report can be utilized in strategic marketing efforts to specific segments of the scrapbooking population.

To order the detailed report, call 888-247-5282 or visit www.ckmedia.com/sia

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