

**LOOK
INSIDE!**

Take a look at the
first few pages of
the full report.



Remodelers 360

*How Americans Use their Kitchens
& their Remodeling Experiences*

Research Institute for Cooking & Kitchen Intelligence:

*Helping kitchen-related businesses make smarter decisions
and better products by delivering actionable insights.*



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Background & Objectives

- The goal of *Remodelers 360* is to determine how Americans are currently using their kitchens, their design preferences, their remodeling experiences, and to gain insight into how best to market to today's consumers.
- *Remodelers 360* was first conducted in 2006 and is repeated every two years, with some adjustments made based on member input and secondary research into hot topics. The second wave of the study was conducted in 2008.



Methodology



- The 2010 *Remodelers 360* study was conducted among 2,906 U.S. consumers between the ages of 18 and 64 from February 12 through March 2, 2010.
- The study was conducted online in partnership with a leading national online panel company, GMI (Global Market Insite, Inc.), headquartered in Seattle, WA.
- In addition to gathering data from the general population on various topics related to their kitchens, the study includes in-depth questions about kitchen remodeling.
 - A subset of respondents who had remodeled or improved their kitchens was oversampled to allow for additional analysis. Once the general population target reached about 2,000, the survey screened tighter for kitchen remodelers.
 - The incidence of remodeling (or improving) a kitchen in the general population is 16 percent.
 - A total of 651 surveys were completed with respondents who had remodeled or made improvements to their kitchens in the past 12 months.
- When data is comparable (i.e., questions are exactly the same) and meaningful (i.e., statistically significant differences emerged), study findings from 2010 are compared to those from 2006 and 2008.
- Statistically significant differences are shown at the 95 percent confidence level.

Methodology, Cont.

- For the purpose of this report, the focus will be on 'true kitchen remodelers', that is, those who remodeled or made improvements to their kitchens in the past year AND spent \$2,500 or more.
 - These 403 respondents were asked an additional battery of questions specifically related to their recent remodeling experience.
 - We also have analyzed data for two levels of kitchen remodelers:



MAIN-MARKET REMODELERS

Spent between \$2,500 and \$14,999 on recent kitchen remodel



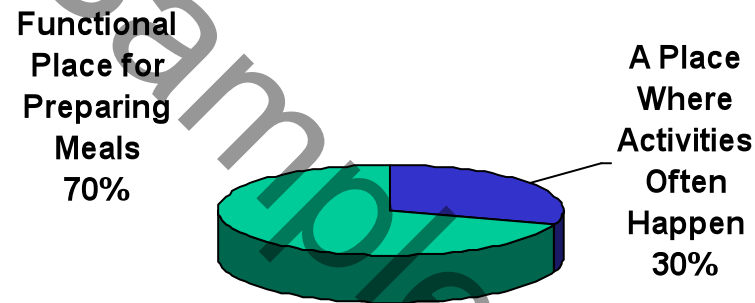
HIGHER-SPENDING REMODELERS

Spent \$15,000 or more on recent kitchen remodel

How People Use their Kitchens

Functional vs. Activity Centered Kitchen

Which of these best describes how your kitchen is used the most?



- Seven in ten people view their kitchens as mostly a functional place for preparing meals, while another three in ten consider it the hub of activity in the home.
 - This 70/30 divide has not changed significantly since surveying began in 2006.
- And two distinct groups of respondents emerged and remain constant from study to study: 1) upper-income women who are more likely to consider their kitchens as the central point of the home, and 2) lower-income men who are more likely to think of their kitchens as purely functional.

More Likely to Say 'Center of Activity':

- Women
- \$100,000+ HHI

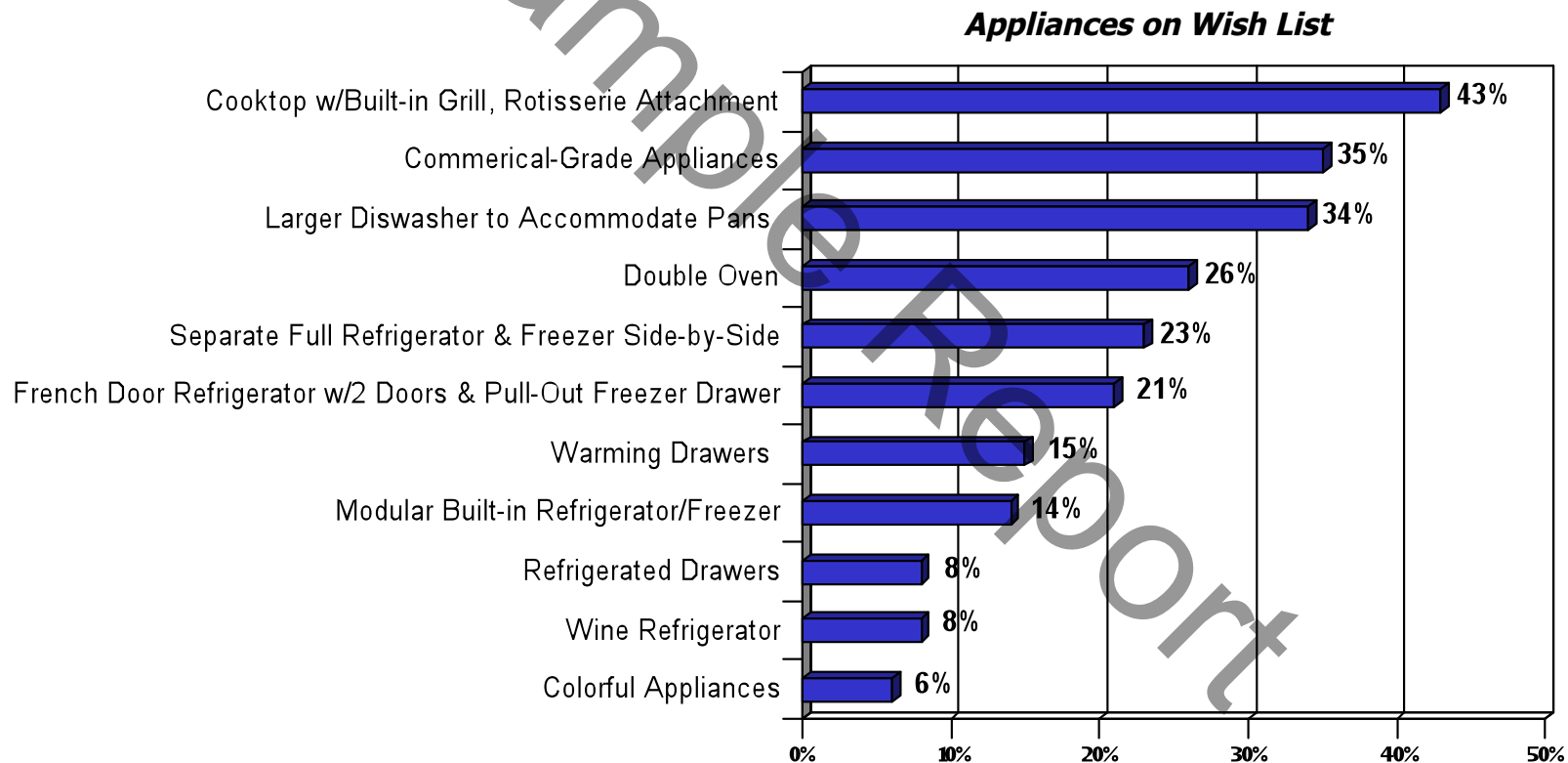
More Likely to Say 'Functional Place':

- Men
- <\$50,000 HHI

The 'Ideal' Kitchen

Kitchen Wish List: Appliances

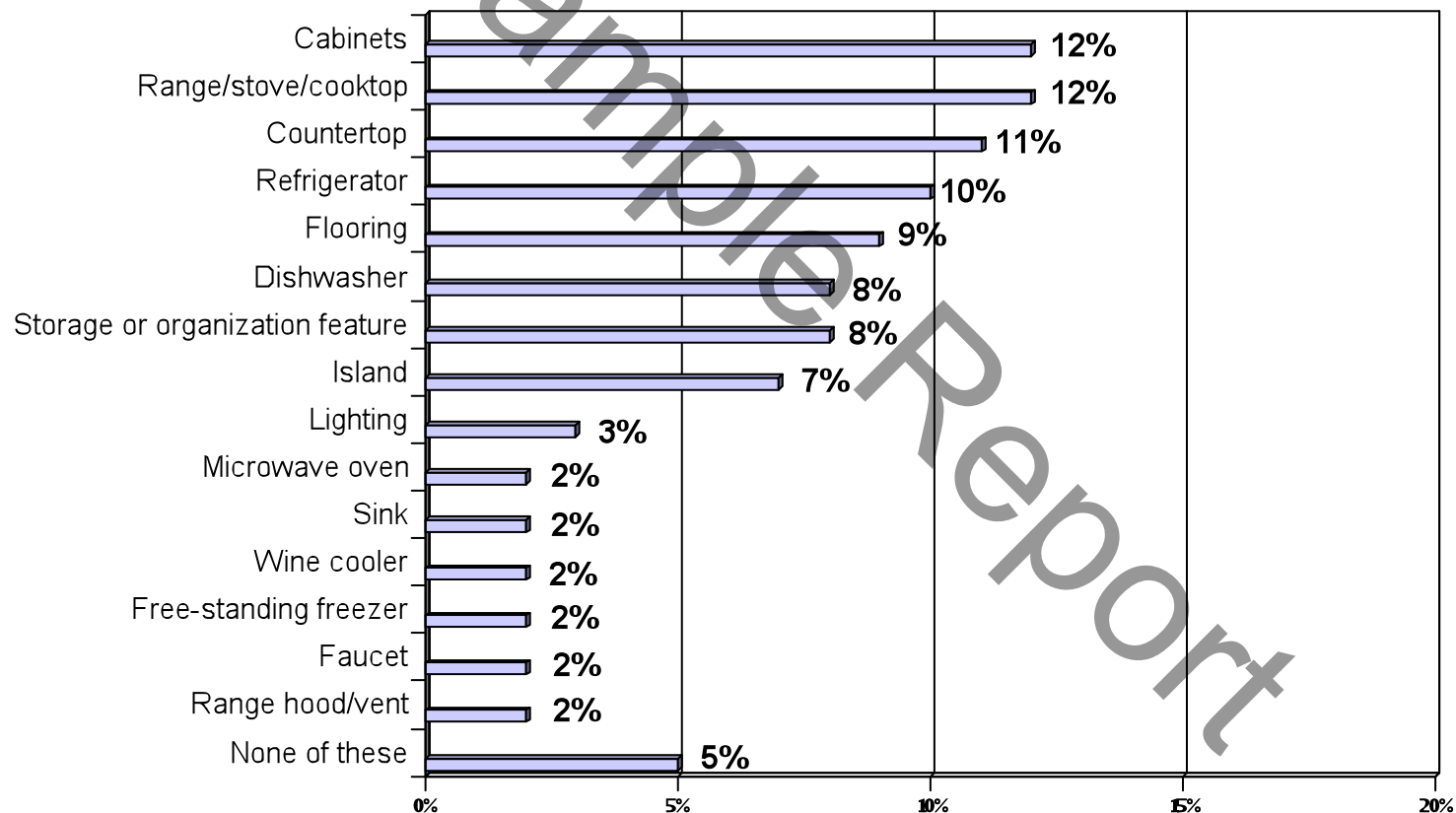
If you were creating your IDEAL kitchen, which of the following would you most want in the kitchen if cost were not a factor (from list)?



Purchasing & Plans

Change Would Make Now to Kitchen if Cost Were No Obstacle

If cost were not an obstacle, which one change or improvement would make to your kitchen in 2010 (from list)?



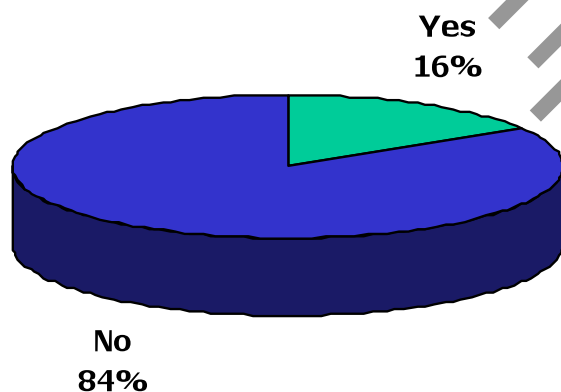
NOTE: Question not asked in previous study periods

Kitchen Remodelers

Sample Report

Recently Remodeled/Improved Kitchen

Have you remodeled or made improvements to your kitchen in the past 12 months?



- The incidence of kitchen remodeling continues to be lower than the 2006 baseline (20%).
- Kitchen remodeling declined to its current level of 16 percent beginning in 2008.

More Likely to Have Remodeled Kitchen:

- Men
- 18-34
- \$50,000+ HHI

About RICKI



- America's leading authority for kitchen research and intelligence.
- The research conducted by RICKI goes beyond traditional research methodologies to help companies gain a better understanding of the mindset of today's consumers by delving deeper into motivations and emotional drivers to pinpoint trends that will impact companies into the future.
- RICKI was founded by a group of professional market researchers. The Executive Director of RICKI spent 18 years in the home improvement industry and was a former president and board member of one of the leading associations for the overall home improvement sector, the Home Improvement Research Institute (HIRI).

To find out more about RICKI, visit: www.kitchenintelligence.org

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