

**LOOK
INSIDE!**

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

Top of the Line: Insights into Upscale Consumers & their Kitchens

Research Institute for Cooking & Kitchen Intelligence:

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

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Objective & Methodology

- The goal of *Top of the Line: Insights into Upscale Consumers & their Kitchens* is to better understand attitudes about and usage of the home kitchens among upscale consumers, as well as their future remodeling plans.
- The survey was conducted online among 1,087 U.S. consumers 18 years old and older in October and November, 2009.
- The report compares study results between three groups of consumers:

| | | |
|--|---|----------------|
| Total Upscale interviews: 700 | 1) <u>Ultra High-End</u> – Household income \$200,000 or more | 93 interviews |
| | 2) <u>High-End</u> – Household income between \$100,000 and \$199,000 | 607 interviews |
| | 3) <u>Moderate</u> – Household income less than \$100,000 | 387 interviews |

- Throughout most of this report, results are shown for 'Total Upscale Consumers' – the Ultra High-End and High-End consumer segments combined – as well as each of the three consumer segments individually. Inclusion of 'Moderate' consumer data is included primarily to contrast and compare to responses from consumers at the upper end.
- Significant differences are shown **in bold** at the 90% confidence level throughout this report.

Key Respondent Characteristics

| Characteristic: | Consumer Segment: | | |
|-------------------------|-------------------|-----------|-----------|
| | Ultra High-End | High-End | Moderate |
| Own Home | 100% | 100% | 100% |
| Single Family Home | 94% | 94% | 94% |
| Median Household Income | \$250,000 | \$134,700 | \$48,900 |
| Median Age of Home | 18 Years | 21 Years | 28 Years |
| Median Home Value | \$530,800 | \$358,000 | \$199,100 |

A third of Ultra High-End Consumers (32%) have homes valued at over \$750,000 compared with only a fraction of High-End (5%) and Moderate Consumers (2%).

Creating a Dream Kitchen



Key Words to Describe their 'Ideal' Kitchen Spans Income Segments

- When asked to choose among 23 words those they associate with their ideal kitchen, the top three words selected by Upscale consumers and those in all three consumer segments were identical:

Organized

Well-Equipped

Comfortable

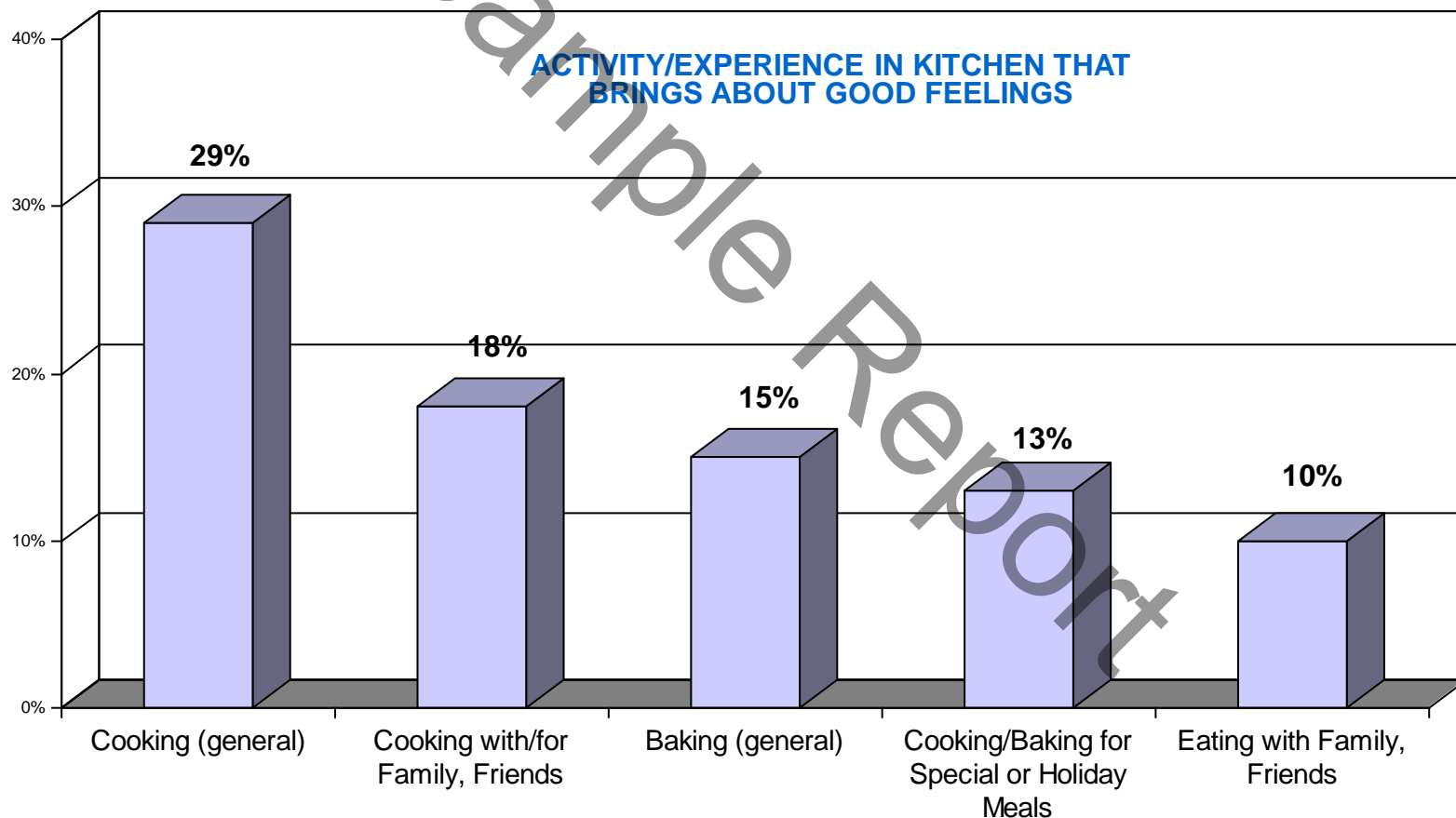
- While the top response from Ultra High-End consumers was 'well-equipped', the top response from the other groups is 'organized.'
- However, Ultra High-End consumers were more likely than their counterparts to choose the word 'sophisticated' to describe their ideal kitchen.
 - Both Ultra High-End and High-End consumers were more likely than Moderate Consumers to associate the words 'gourmet' and 'dazzling' with their ideal kitchens, with gourmet mentioned twice as often as dazzling.
 - Moderate Consumers were more likely than those in the two upscale segments to choose the words 'warm', 'homey', 'cozy', 'peaceful', 'traditional' and 'quiet.'
- Two words fall at the bottom of the list, mentioned by less than 10 percent of consumers in all three segments: 'minimalist' and 'retro.'

Kitchen Remodeling Activities & Attitudes



The Kitchen is a Place for Cooking But Also for Spending Time with Family & Friends

Describe something you do in your kitchen that makes you feel good, or a memory or experience that took place in your kitchen that made you happy. (open end)



NOTE: Adds to more than 100% because multiple answers accepted

Brand Perceptions & Attitudes



Ultra High-End Consumers are More Brand Conscious than Others

- Ultra High-End consumers are far more brand conscious and less price sensitive than consumers in the other two groups.

BRAND ATTITUDES

| Statement Describes Me Completely: | Total Upscale Consumers | Consumer Segment: | | |
|---|-------------------------|-------------------|----------|------------|
| | | Ultra High-End | High-End | Moderate |
| If I have to choose between brand name and features, I will choose features | 28% | 28% | 28% | 28% |
| I believe that the brands I buy somehow reflect on me | 16% | 25% | 14% | 12% |
| If I had to choose between a brand name and a good price, I will choose price | 16% | 14% | 17% | 25% |

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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