

**LOOK
INSIDE!**

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first few pages of
the full report.



Kitchen Remodelers:

Spending, Use of Professionals & Sources for Ideas

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.
 - Data was also analyzed for two levels of kitchen remodelers:



MAIN MARKET REMODELERS

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



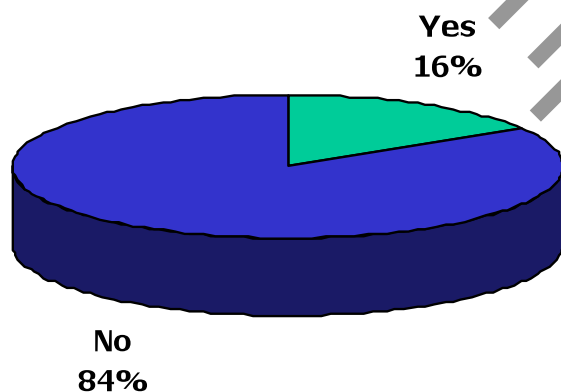
HIGH-END REMODELERS

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

Kitchen Remodel Spending

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.

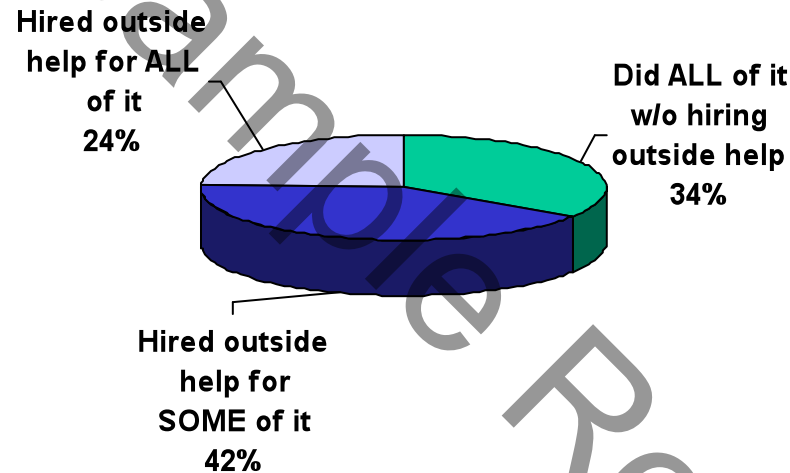
More Likely to Have Remodeled Kitchen:

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

Method for Undertaking Kitchen Remodel

DIY vs. Hiring Outside Labor

Did you do the labor on this recent project yourself or did you hire outside help?



- Almost two-thirds of kitchen remodelers (66%) hired outside help to do at least some of the labor on their last kitchen remodel.
 - High-End Remodelers are nearly twice as likely as Main Market Remodelers to have hired outside help to do all of the labor on the project (37% and 21%, respectively).
 - Household income relates to how projects are undertaken. As income increases, so does the likelihood of hiring outside help for the entire project. Also, women are more likely than men to use outside help for the entire project.
- About the same proportion of remodelers hired outside help for all of the project in all three study periods (26% in 2006, 28% in 2008 and 24% in 2010).

Idea Sources for Kitchen Remodeling

Number of Idea Sources

MEAN NUMBER OF IDEA SOURCES USED

TOTAL REMOLDERS:

<u>2008</u>	<u>2010</u>
3.7	5.6

- Comparing the number of idea sources used in the 2008 and 2010 studies, it is clear that remodelers of all stripes are relying on significantly more sources today.

MAIN MARKET REMODELERS:

<u>2008</u>	<u>2010</u>
3.8	5.2

- Younger consumers (age 18 to 44) consult more sources than their older counterparts.
- As income increases, so does the number of idea sources used.
- High-End Remodelers collect ideas from more sources than do Main Market Remodelers.

HIGH-END REMDOLERS:

<u>2008</u>	<u>2010</u>
4.3	7.2

NOTE: Question asked slightly differently in 2006 and therefore not comparable to later years.

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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