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KITCHEN CONVERSATIONS: APPLIANCES

*Exploring Online Discussions about Refrigerators,
Dishwashers & Cooking Appliances*

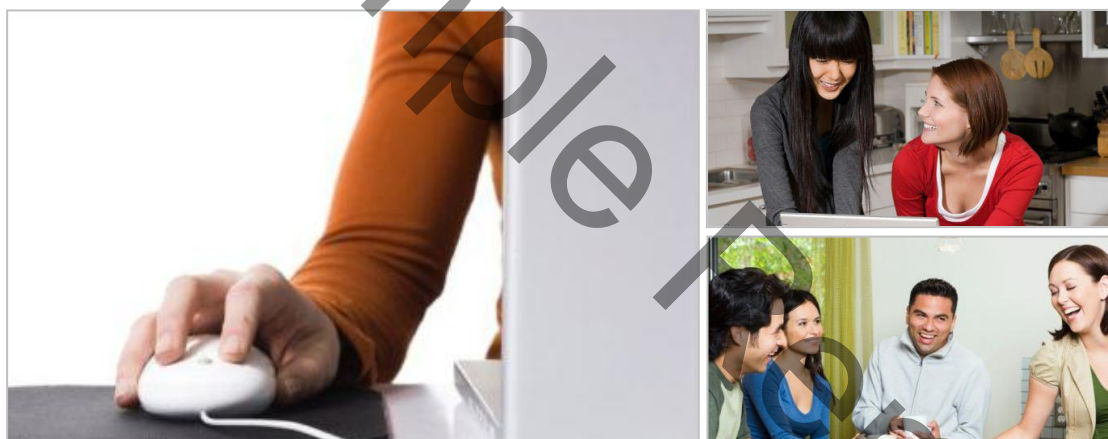


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INTRODUCTION & METHODOLOGY

Sample Report

INTRODUCTION & METHODOLOGY

Kitchen Conversations Overview

Millions of people are talking. Sharing their thoughts, experiences, likes and dislikes on forums, blogs, YouTube, Twitter, Facebook, and other user-generated content networks. **The online media channel is a critical driver of offline purchase behavior** with user-generated content and social networking driving much of the innovation and collaboration occurring around the Internet today. Consumed by increasingly complex, fast-paced lives, people are constantly bombarded by news, information and marketing messages. **In today's attention economy and the era of the social web, the name of the game is trust and the new ROI is Return on Influence.**

The goals of this study are to offer some preliminary insight to online attitudes and emerging themes related to kitchens and to provide a top-level analysis of online brand visibility and sentiment for RICKI members.

This report focuses on three major kitchen categories:

1. Refrigerators
2. Dishwashers
3. Cooking appliances (ovens, stoves, ranges, cooktops)

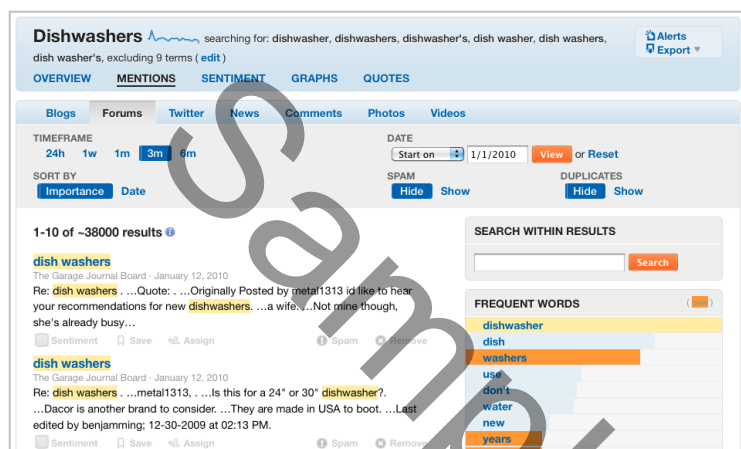
NOTES:

- Other category reports also available are: Faucets and Ventilation/Hood.
- For RICKI members, online conversations about specific brands were analyzed.

Methodology

The research was conducted in three key phases using a combination of: 1) the latest social media monitoring technologies, 2) detailed contextual theme analysis (completed manually by the RICKI research team), and Google search trends.

Step I – Social Media Research:



For the purposes of this study, RICKI analyzed **1,800 online conversations** taking place on forums and message boards during Q1 2010 (January 1, 2010 – March 31, 2010). Forums operate on a premise of open and free discussion and typically feature questions, comparisons, polls of opinion as well as debates on various topics. Compared to forums, blogs, which were excluded in this analysis, are more likely to be used for commercial or publicity purposes, including back-links for establishing higher organic search engine rankings. **Forums, in our opinion, provided a**

better sample for unbiased, deeper online consumer discussions.

A key component of this phase of the social media research included building accurate search and monitoring profiles. In order to eliminate irrelevant results, it was necessary to exclude certain terms from the search profiles. For example, when analyzing the category term “dishwashers”, we needed to exclude terms like “job” or “jobs”, “restaurant” or “hiring”, in order to eliminate any results related to dishwasher job opportunities.

Step II – Contextual Theme Analysis:

The initial data set across all categories encompassed an estimated 6,000 forum posts.

Approximately 1,000 posts were exported for each category. RICKI then completed a comprehensive contextual theme analysis of 300 discussion posts for each of the six kitchen categories (1,800 total) to establish the most popular conversation topics.

In our opinion, the contextual theme analysis phase is a critical step in social media monitoring required to uncover the most popular themes. This manual, labor-intensive process is critical for identifying pertinent themes. Current automated processes offered by social media analysis packages on the market cannot provide this type of targeted analysis.

In many cases, a single forum post by one person encompasses a number of topics so it is imperative to conduct a detailed manual review of all posts to make sense of the massive amount of text found online. Themes representing less than 5% of the conversations for each category are not shown.

The report includes select verbatim quotes. These comments are generally left 'as is' with grammar unchanged, however misspellings were corrected, including brand names.

Step III – Google Search Trends:

In addition to thoroughly examining online conversations, we also explored Google search engine activity to uncover keyword search trends related to kitchens. Google 'Insights for Search' feature analyzes web searches among Google's multiple search domains and databases.

For the purposes of this report, we analyzed kitchen category keywords within the Google web search database. All searches were filtered within the Home & Garden category.

Here is an overview of what's included (or how to read the data presented):

Keyword:	Category keyword (for example: kitchen faucet)
Timeframe:	January 2008 – May 2010
Database:	Google Web Search
Category:	Home & Garden (and related sub-categories when appropriate)
Interest:	Graph with trend line showing keyword activity and interest over time
Top Searches:	Related search terms with the highest level of interest (The data is displayed on a scale of 0 to 100, with 100 indicating the most frequently used search terms)
Rising Searches:	Related search terms that have experienced significant growth (If the word "Breakout" is used instead of a percentage, the search term experienced a change in growth greater than 5,000% with respect to the preceding time period of January 2006 to May 2008).

NOTE: Results from Google keyword research is intended for exploratory and informational purposes only.

Word Clouds



A word cloud is a visual depiction of the most popular words represented by different font sizes and colors. Words appearing more frequently in the discussions are represented by larger font sizes. The different colors do not carry any weight or value, but rather serve as a way to add visual interest and make the word cloud easier to read.

The word cloud enables you to quickly uncover themes based on keyword density or how frequently different terms appear. Each kitchen category conversation analysis includes a word

cloud that was created by extracting forum post titles and content, then manually removing irrelevant words and category terms. This process required several phases of review and filtering for each category in order to uncover the most relevant terms. For purposes of this report, we included the top 50 terms for each category.

Internet Shorthand

Internet shorthand is a type of slang that is frequently used among Internet users. Such terms often originate with the purpose of saving keystrokes. Here are a few of the shorthand terms that you will likely see in the verbatim quotes included throughout this report.

BTW – By The Way
DD – Dear Daughter or Due Diligence
DH or DUH – Dear Husband, Darling Husband or Duh Hubby
HD – Home Depot
IL – In Laws
IMHO – In My Honest Opinion, In My Humble Opinion
IMO – In My Opinion
IOW – In Other Words
LOL – Laughing Out Loud
MIL – Mother In Law
MW - Microwave
OTOH – On The Other Hand
PITA – Pain In The A**
S-B-S – Side by Side
SS – Stainless Steel
TIA – Thanks In Advance
YMMV – Your Mileage May Vary

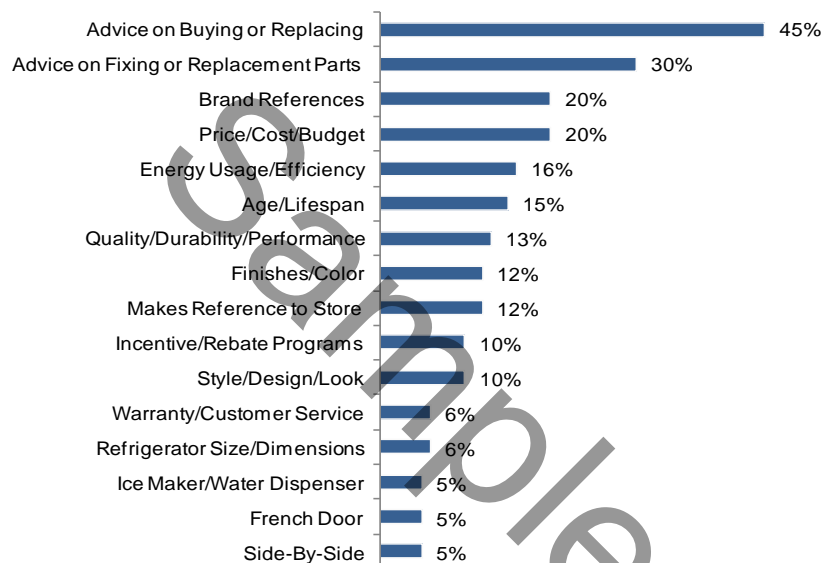
ONLINE KITCHEN CONVERSATIONS

Sample Report

Refrigerator Conversations – Popular Topics

Overview

The following chart highlights the most popular online conversation themes related to refrigerators. The results are based on an analysis of 300 Internet forum/message board conversations over a three-month period from January 1, 2010 to March 31, 2010.



“What happened to the refrigerators that lasted forever? The only time I ever needed a new refrigerator was when I moved to a new house that didn't have one. This thing is 5 years old.

MadJack

“My new refrigerator is a **Frigidaire with a stainless look satin-finish so you don't have the fingerprints.**

WindyCityMom

(NOTE: Adds to more than 100% due to multiple themes within conversations)

- The most popular conversation theme was people actively seeking or giving advice on buying a new refrigerator, with nearly half of the discussions referencing the purchase or replacement of this appliance.
 - One out of five posts mentioned price or budget and one in 10 made reference to some sort of incentive or rebate program.
- Another major theme was refrigerator repair. A third of the online conversations centered-around seeking or giving advice on troubleshooting problems or replacement parts.
- Refrigerator brand affinity appeared prominently and in some cases passionately. One out of five conversations included people sharing their experiences or making recommendations for – or advising against – a specific brand of refrigerator.
- Energy efficiency as well as product lifespan, quality and performance were also relatively top of mind.
 - Conversations about efficient refrigerators often related to how efficient new appliances are and Energy Star ratings. Others focused on their “old” unit but still wanting to allow it to “die a natural death”, that is, wait until it stops working to replace it.
- Refrigerator design, finish and style were also prominent themes in conversation threads.

Refrigerator Conversations – Select Verbatim Quotes

“**We are big fans of stainless steel appliances.** We remodeled our kitchen about 3 years ago and we've been very satisfied with the appliances so far. We purchased a KitchenAid dishwasher and the rest of the appliances from **Frigidaire's Professional Series line** (double oven with convection, over-the-range microwave, cook top and refrigerator). The custom tile work we had installed for the backsplash had stainless accents in some of the tiles as well. Stainless works really well with the granite countertops and stainless sink. **My wife really likes her kitchen, so that makes me happy by extension.**

Steve W

“We have a neighbor who sells electronic parts to companies who use them. He said that the **electronics in the refrigerators, dishwashers and stoves are only rated to last 7 years. So, he bought his appliances based on what the electronics ratings were - and he bought LG.** So, that'll be our next purchase I think.

WeLuvNC

“Overall, **I now treat appliances as disposables,** meaning when they quit you buy a new one, and make sure they take away the old one and dispose of it.

Kjbrill

“So many **refrigerators today are going for the 'Energy Star' rating that they are putting in smaller compressors than they used to and the life expectancy of the appliance is less than your old one.** Happy fridge shopping.

Jim R

“Yes, **older refrigerators are inefficient;** however, if they still work there is nothing wrong with keeping them until they die a natural death. **The "footprint" of replacing a still working unit is much larger than continuing to use the old one.** This counts for all appliances, not just refrigerators. I have a 1951 Frigidaire by General Motors stove/oven that is still going strong. Of course, **some people just like to waste money and resources by replacing with the latest and newest piece of garbage made in China while claiming to be "green".**

DesertSun41

“**I absolutely LOVE my stainless steel appliances.** The ones I bought were mid-range in price – Jenn-Air dual fuel range (stove top is gas, oven is electric), Jenn-Air dishwasher - deep tub and cleans great, Jenn-Air double oven - super bold look with pro handles, and **Jenn-Air refrigerator.** The only drawback to any of these appliances is that even though the Jenn-Air refrigerator is supposed to be 26 cubic feet of storage capacity - it's not roomy. I definitely would consider an upgrade to Sub-Zero or a larger pro refrigerator when I move to a house with a larger kitchen.

DiscoBunny19

“I'll chime in on the **recommendations for GE appliances. Everything we have is GE and they have served us well. On the fridge, don't get a side-by-side as it is a very inefficient setup storage-wise.** I wish our fridge had the freezer on the bottom, perhaps the pullout type. **Besides seeming to make more sense, it is logical that the regular refrigerator be higher up since it is the compartment most often accessed.**

Peter C

ABOUT RICKI

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The Research Institute for Cooking & Kitchen Intelligence (RICKI) is the leading authority for insightful consumer and product research, dedicated exclusively to uncovering trends, that enable better decisions and smarter product development by today's leading kitchen brands.

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).

RICKI capabilities combine the latest research tools, including social media monitoring, with time-tested research methodologies and a team of creative-thinkers with extensive industry expertise to bring insights that make the home kitchen a better place.

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Sample Report

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