Study Overview

RESEARCH PURPOSE
• Educate designers and manufacturers on the outdoor kitchen market and provide a profile of US homeowner needs, preferences and usage of outdoor kitchens.

RESEARCH OBJECTIVES
• Determine behaviors and touchpoints when shopping for outdoor kitchens.
• Identify products and materials homeowners desire and select for their outdoor kitchens.
• Understand how homeowners use/plan to use their outdoor kitchens.
• Understand customer satisfaction among homeowners who have completed an outdoor kitchen.

METHODOLOGY/SAMPLE
• 15-minute online survey among a national panel sample conducted in March 2019.
• Respondent qualifications:
  ✓ Age 21-70
  ✓ Homeowner
  ✓ Income $60,000 or more
  ✓ Built an outdoor kitchen in past three years or definitely/probably will build in next year and has started researching ideas/products.*
  ✓ Outdoor kitchen budget is $5,000+ and ODK must include grill + refrigerator + at least one of the following items:
    – Cabinets/built-in storage with doors or drawers
    – Countertop/food prep surface
    – Dishwasher
    – Ice maker
    – Fireplace
    – Pizza oven
    – Sink
• 303 total completes:
  ✓ 113 completed* an outdoor kitchen
  ✓ 190 planning* to build an outdoor kitchen
Key Findings

RESEARCH & SHOPPING
• Homeowners are seeking advice from designers and garden specialists for their outdoor kitchens.
• Key sources for design and layout include home-improvement (HI) retailers/websites, outdoor specialty retailers, contractors, magazines, TV shows and HI websites.
• The top purchase channels for products and materials are HI retailers and outdoor specialty stores.
• Nearly all homeowners (84%) use professional installers for at least part of their outdoor kitchen installation.

FOOTPRINT & PROFILE
• Typical spend is about $13,000 on an outdoor kitchen, but a quarter of homeowners are building very high-end kitchens ($30,000+).
• Most outdoor kitchens are between 100 and 400 square feet, including a sitting area in the meal preparation space.
• Many of these spaces are located immediately next to the home and share an exterior wall, though some are set away from the home, and a few are transition rooms.
• “Family-friendly” and “casual” are key for the look and feel of outdoor kitchens.

KEY PRODUCTS / DESIGN
• Fixed overhead structures or pergolas with stone/brick walls are most popular, providing multiple benefits: protection, atmosphere and privacy.
• Key components for the outdoor kitchen include a grill, refrigerator (both required), sink, cabinets, countertop/food prep surface, lighting and TV.
• Overall appearance, layout/flow, shelter for protection/privacy and material/product selections are all key in outdoor kitchens.
Key Findings

APPLIANCES

• Most consumers select a built-in, under-counter refrigerator for their outdoor kitchen.
• Most also include a built-in grill with natural or propane gas; some include a second grill.
  • The majority of grills have a stainless-steel finish and include other features like side burners and/or warming racks.
• Freestanding heaters are popular to improve comfort during cooler seasons.

COUNTERTOPS & FLOORING

• Natural stone countertops are the most popular for outdoor kitchens.
• Counter-height and bar-height counters are both being used.
• Natural stone is also most popular for flooring in outdoor kitchens, along with pavers, poured concrete and cut stone.

SEATING & STORAGE

• Counter/bar seating and conversational seating areas are most common in outdoor kitchens.
• Freestanding dining tables are less popular.
• Built-in cabinetry with stainless-steel/metal or wood doors are most prevalent in outdoor kitchens.
  • Cabinet door and drawer styles vary, but colors are usually gray/silver or beige, tan or brown.
  • Cabinets are used mostly for storing non-food items, e.g. cooking/grilling tools, cleaning supplies, glassware, dishes and charcoal/wood chips.
Key Findings

INFRASTRUCTURE & ELECTRICAL
- Most outdoor kitchens include some infrastructure elements, especially electricity, water, drainage and gas lines.
- Electrical outlets power small appliances and entertainment.
- Overhead and ambient lighting are common in most outdoor kitchens.
- Inclusion of task and floor lighting and cooking ventilation is limited.

OUTDOOR KITCHEN USAGE
- Most homeowners use or plan to use their outdoor kitchen at least a few times a week, for three seasons out of the year.
- Outdoor kitchen usage is most often for family meals or smaller get-togethers (10 or fewer people).
- The male head of household takes the lead for cooking outdoors.
- Meal prep and clean up often includes the use of the indoor kitchen, suggesting the benefit of an easy transition between kitchens.

CHALLENGES & OPPORTUNITIES
- Key improvement opportunities include ease of preparing food in winter, storage and keeping bugs out.
- Some wish they had spent more time or money on an overhead structure, increased space, counters/cabinets or better temperature/lighting.
- Some homeowners would like more selection for counters, cabinets/storage and appliances.
Many homeowners with outdoor kitchens are married Gen Xers, often both working full-time jobs who live in warmer climates.

**DEMOGRAPHIC PROFILE**

**GENRE**
- 56% Men
- 44% Women

**AGE**
- 12% Millennials
- 52% Gen X
- 36% Boomers

**ETHNICITY**
- Caucasian: 88%
- Hispanic: 11%
- African-American: 3%
- Asian: 6%

**MARRIED**
- Yes: 90%

**WORK FULL TIME**
- Self: 73%
- Spouse: 71%

**CHILDREN IN HH**
- Yes: 50%

**INCOME**
- Mean: $183,000

**REGION/CLIMATE**
- South: 40%
- West: 25%
- Northeast: 22%
- Midwest: 13%

Typical Summer Highs 90°F
Typical Winter Highs 44°F

Base = Total (n=303) completed and planning
Homeowners with outdoor kitchens live in higher-value single-family homes in suburban areas.
The outdoor kitchen market in the U.S. is currently small, comprising about a half a million American households.

### Market Sizing
**(US Market)**

#### Homes in Target *

- **~38.9 million**
  - Single, detached, owner-occupied homes with annual household incomes of $60,000 or more

#### Outdoor Kitchen Incidence

- **1.4%**
  - Built an outdoor kitchen in past three years or definitely/probably will build in next 12 months and have started researching ideas/products
  - Outdoor kitchen budget is $5,000+ and it must include grill + refrigerator + at least one of the following items:
    - Cabinets/built-in storage with doors or drawers
    - Countertop/food prep surface
    - Dishwasher
    - Ice maker
    - Fireplace
    - Pizza oven
    - Sink

#### Target Households

- **~545K**
  - Completed past three years ~ 202K
  - Plan next 12 months ~ 343K

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*Note: The numbers above represent market size potential based on survey and census data, and do not meet thresholds of a volumetric forecast. Key elements of a volumetric forecast lacking in this analysis include economic data, sales data, marketing spend data, product availability, etc.*
More than one-third of the outdoor kitchen market is in California, Texas and Florida.

Share of Outdoor Kitchen Market by State

- California: 16%
- Texas: 12%
- Florida: 10%
- Others: Various percentages as shown on the map.
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THANK YOU!
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