



Outdoor Kitchen Profile

Executive Summary

June 2019

NKBA
NATIONAL
KITCHEN+BATH
ASSOCIATION

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.

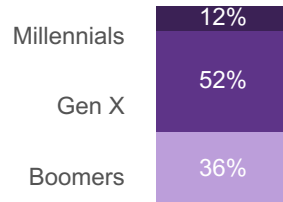
Many homeowners with outdoor kitchens are married Gen Xers, often both working full-time jobs who live in warmer climates.

DEMOGRAPHIC PROFILE

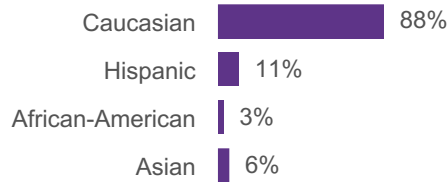
GENDER



AGE



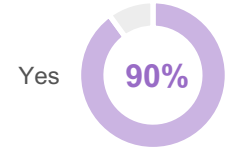
ETHNICITY



INCOME

Mean **\$183,000**

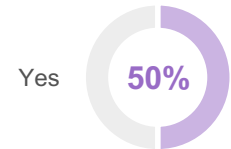
MARRIED



WORK FULL TIME

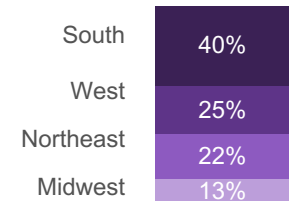


CHILDREN IN HH



REGION/CLIMATE

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



Homeowners with outdoor kitchens live in higher-value single-family homes in suburban areas.

HOME PROFILE

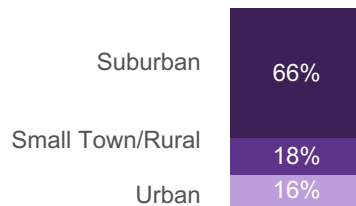
AGE OF HOME

Average **18 years**

YEARS IN HOME

Average **10 years**

HOME LOCATION



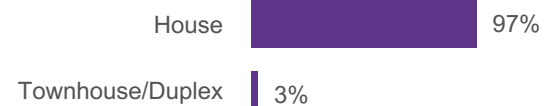
SQUARE FOOTAGE

Average **2,878**

VALUE OF HOME

Average **\$482,000**

HOME TYPE



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%

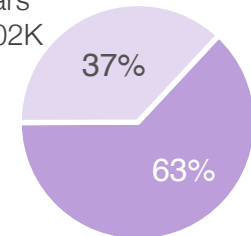
- Built an outdoor kitchen in past three years or definitely/probably will build in next 12 months and have started researching ideas/products
- Outdoor kitchen budget is \$5,000+ and it must include grill + refrigerator + at least one of the following items:
 - Cabinets/built-in storage with doors or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



TARGET HOUSEHOLDS

~545K

Completed past three
years
~ 202K

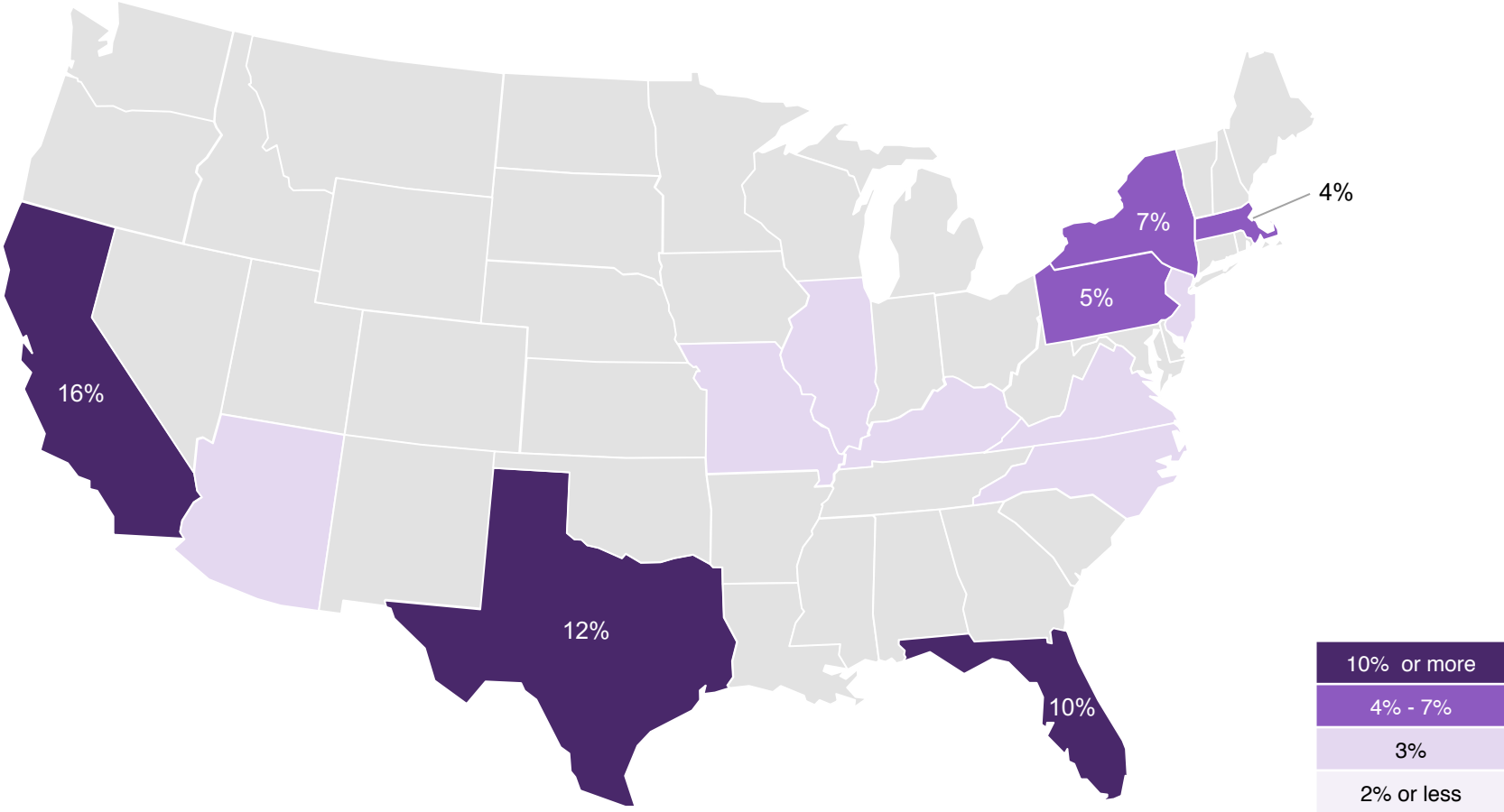


Plan next 12 months
~ 343K

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



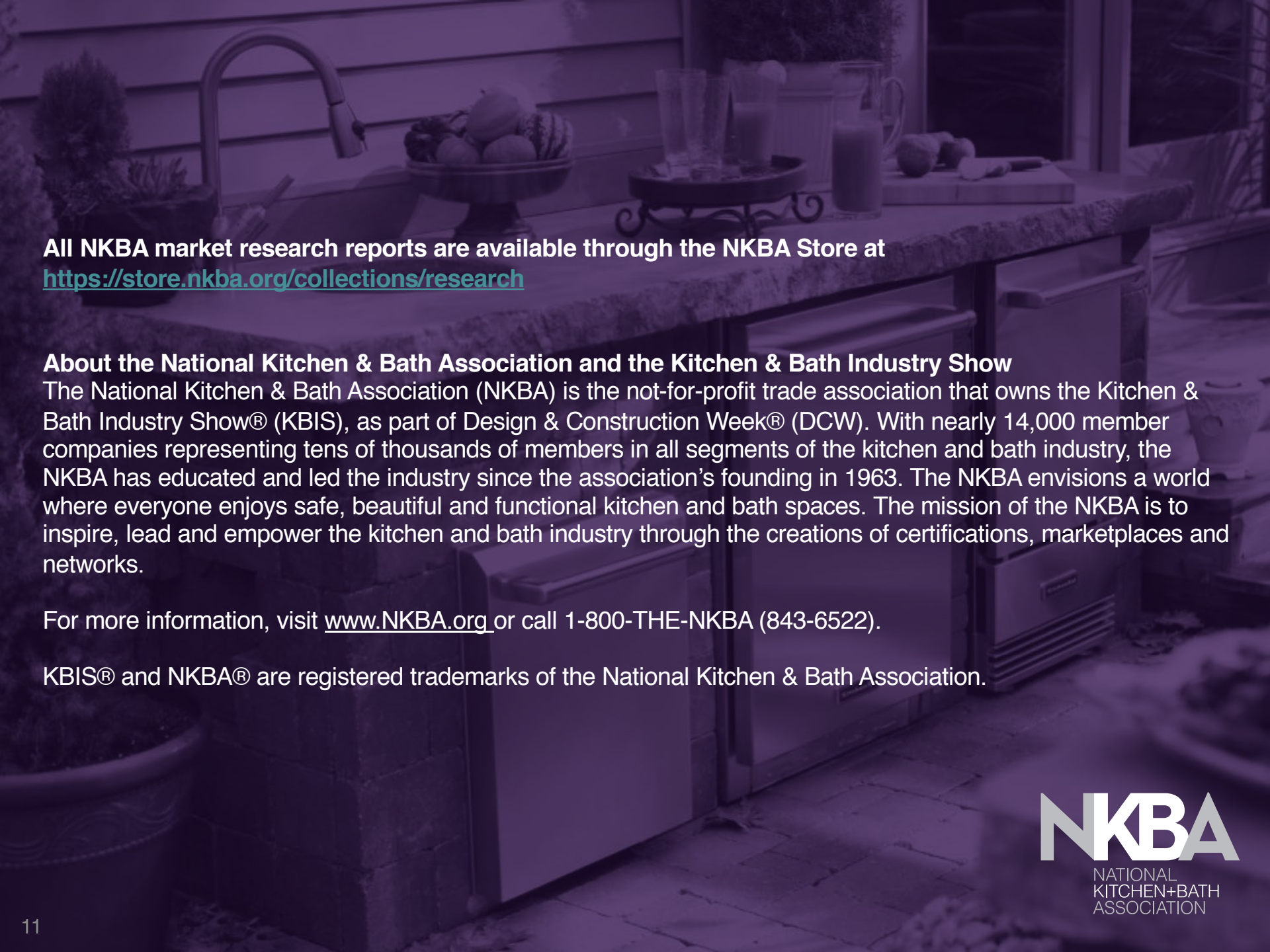
ACKNOWLEDGMENTS

NKBA wishes to acknowledge the following individuals for generously serving as subject matter experts on this study.

- **Danver Stainless Outdoor Kitchens**
Mitch Slater
- **Kalamazoo Outdoor Gourmet**
Russ Faulk, Alexis Hiller
- **Lynx Grills**
Scott Grugel, Christina Chung

THANK YOU!





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