2018



U.S. HOUZZ KITCHEN TRENDS STUDY



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Big Ideas

CLUTTER DRIVES US MAD

Most homeowners admit to obsessing over decluttering kitchen surfaces and putting things away hence, the abundance of built-in cabinet storage and organizers that cater to these needs. Pullout waste bins, utensil and dish organizers, and wine/bar cabinets have become increasingly popular.

ENGINEERED QUARTZ ECLIPSES GRANITE

Countertops are the top feature to splurge on during kitchen renovations. Engineered quartz is now the most popular material for countertops, as granite continues a three-year decline. The popularity of quartz is highest in urban and suburban areas, while granite is still the top choice in rural areas.

STYLES IN TRANSITION

More renovating homeowners are opting for a completely different kitchen style compared the previous two years. Iconic modern and traditional styles are giving way to transitional, contemporary, and farmhouse styles. Similarly, homeowners are leaning away from a more traditional U-shaped kitchen layout toward an L-shape.

SAN FRANCISCANS SPEND THE MOST ON REMODELS

Among the top 20 U.S. metro areas, homeowners in San Francisco spend the most on kitchen remodels, averaging \$70,000 for a major remodel of a large kitchen (200 square feet or more), compared with \$42,000 nationally. Overall, costs vary significantly by scope of remodel, size of kitchen, and region. Coastal cities spend the most on average.

A RECIPE FOR TECHNOLOGY

Technology is no stranger to modern kitchens, with many homeowners integrating new electronics, such as wireless speakers, and new appliances with high-tech features, such as wireless or voice controls. These preferences continue to evolve as new devices, such as home assistants, take the place of older ones, like TVs.

At a Glance

Renovated Kitchen Characteristics

Average Remodel Spend (on a major remodel larger kitchens (200+ sq. ft.)	Avg. spend: Minor remodel large kitchen \$22,000	Avg. spend: Minor remodel small kitchen \$13,700	Avg. spend: Major remodel small kitchen \$25,800	Avg. spend: Major remodel large kitchen \$42,000
Pro Hiring (among renovating	Overall hiring	#1 pro type hired: General contractor	#2 pro type hired: Kitchen designer	#3 pro type hired: Direct specialty hire
homeowners)	85% -2pp [#]	52 %	26%	22%
Scope Details	Increase kitchen size	Average kitchen size	Change to kitchen layout	#1 new layout: L-Shaped
homeowners)	40% +4pp [#]	230 sq. ft.	50%	36%
Top Upgraded Features	Countertops	Sink 89%	Backsplash	Faucets
(among renovating homeowners)	94%	09 %	00%	00%
Countertop & Flooring Materials	#1 countertop material: Engineered quartz	#2 countertop material: Granite	#1 flooring material: Hardwood	#2 flooring material: Ceramic or porcelain tile
(among homeowners updating countertops or flooring)	43%	34% -6pp [#]	29%	25% -5pp [*]
Style Change (among renovating	Change to kitchen style	#1 new kitchen style: Transitional	#2 new kitchen style: Contemporary	#3 new kitchen style: Farmhouse
homeowners updating style)	87% +12pp [#]	25% +9pp [#]	17% -4pp [#]	12 %
Top Colors (among renovating	#1 Wall color: Gray	#1 Flooring color: Wood-medium	#1 Countertop color: Multicolored	#1 Cabinet color: White
homeowners)	27%	30%	27% -5pp [#]	43%
Top Project Triggers (among renovating	Can no longer stand old kitchen	Wanted to do it all along and finally have the means	Purchased my home recently and want to personalize it	Old kitchen deteriorated or broke down
homeowners)	41%	36% -3pp#	28%	20% -5pp

#Reflects percentage point difference between 2018 and 2017 study findings (see 2017 study); shows only statistically significant differences at 90% confidence levels.

About Renovating Homeowners

The Urge to Purge

Most homeowners admit to obsessing over decluttering kitchen surfaces (75%) and putting things away (66%), followed by recycling, cooking from scratch, and washing dishes. Urbanites are more likely to obsess over recycling than disinfecting counters or baking, compared with rural renovators.



*Percentages reflect proportion of homeowners who have completed, are currently working on, or are planning a kitchen renovation during 2017-18.

Boomers in the 'Burbs

Most kitchens today are being renovated by homeowners living in the suburbs. Since the majority of the renovating homeowners are 55 or older (60%), it is not surprising that the majority of renovators living in the suburbs are also 55 or older (58%).



*Percentages reflect proportion of homeowners who have completed, are currently working on, or are planning a kitchen renovation during 2017-18.

Budget and Spend

\$42,000 Kitchens

The average spend on a major remodel of a kitchen 200 square feet or larger is \$42,000^{*}, while a major remodel of a smaller kitchen averages \$25,800, both of which include replacing all of the cabinetry and appliances. Kitchen remodels that are more limited in scope cost roughly half as much.

AVERAGE SPEND ON A COMPLETED KITCHEN REMODEL (PRO & DIY) BY SCOPE AND SIZE*



*Average spend on remodels combines data from this study with data on spend reported in the Houzz & Home Study for 2015 and 2016. *Major remodel* refers to a remodel in which at least all the cabinets and appliances are replaced; *minor kitchen remodel* includes all other remodels.

San Francisco Has Highest Remodel Costs

Spending on a kitchen update is highest in the San Francisco metropolitan, averaging \$70,000 for a major remodel and \$35,400 for a minor remodel of a large kitchen (200 or more square feet). Philadelphia, Washington D.C., and New York are distant runners-up. Among the top 20 U.S. metro areas, the average spend on a major remodel of a larger kitchen is the lowest in the Miami and Riverside, California, metropolitan areas (\$31,500 and \$31,200, respectively).

AVERAGE SPEND ON A COMPLETED REMODEL OF A LARGE KITCHEN (PRO & DIY) - TOP 20 METROS (IN \$1,000S)*

\$35	5.4	San Francisco, CA	\$70.0
	\$28.2	Philadelphia, PA	\$55.6
Ś	531.7	Washington, DC	\$54.9
	\$29.2	New York, NY	\$51.5
Ś	32.2	Seattle, WA	\$50.2
	\$20.6	Houston, TX	\$49.5
	\$28.0	Los Angeles, CA	\$45.7
Ś	30.9	Boston, MA	\$45.6
т	\$16.8	San Diego, CA	\$44.9
	\$20.5	St. Louis, MO	\$44.8
	\$29.2	Minneapolis, MN	\$43.7
	\$21.2	Atlanta, GA	\$40.5
	\$19.2	Dallas, TX	\$40.4
	\$21.3	Detroit, MI	\$39.7
Minor Domodol of a	\$19.4	Denver, CO	\$39.6
	\$24.1	Chicago, IL	\$39.0
Large Ritchen	\$19.9	Phoenix, AZ	\$36.6
Major Domodol of a	\$26.0	Tampa, FL	\$34.2
Major Remodel of a Large Kitchen	\$17.0	Miami, FL	\$31.5
	\$22.2	Riverside, CA	\$31.2

*See Page 9 footnote for sources and remodel and size definitions.

Coastal Cities Command Greater Spend

Kitchen remodel costs also vary widely by region for small kitchens, those less than 200 square feet. Homeowners in San Francisco spend the most on major and minor remodels of such kitchens (\$43,900 and \$22,300, respectively). Homeowners in Boston, Seattle, and Washington D.C., spend over \$30,000, on average, for a major remodel, with other major coastal cities close behind.

AVERAGE SPEND ON A COMPLETED REMODEL OF A SMALL KITCHEN (PRO & DIY) – TOP 20 METROS (IN \$1,000S)*



*See Page 9 footnote for sources and remodel and size definitions.

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Splurging on Countertops

Countertops, appliances, and cabinets are the most common splurges during kitchen renovations (42%, 36%-39%, and 31%, respectively), whereas homeowners tend to save on flooring, backsplashes, and lighting fixtures (11%, 10% and 10%, respectively).



*Percentages reflect proportion of homeowners who chose to splurge or save on a feature among those installing the feature as part of a completed kitchen renovation during 2017.

Triggers and Scope

All Roads Lead to a New Kitchen

More than a quarter of kitchen upgrades (28%) are driven by a recent home purchase, with an even greater share in urban center renovators (34%) citing that reason. That said, "no longer being able to stand the kitchen" and "finally having the means" continue to be the leading reasons for starting a kitchen renovation. Interestingly, fewer homeowners are citing multiple reasons for a renovation compared with last year, as evidenced by a year-over-year decline in four of the seven chosen project triggers.

EVENTS TRIGGERING KITCHEN RENOVATIONS*

Rural Suburban Urban



*Percentages reflect proportion of homeowners who have completed, are currently working on, or are planning a kitchen renovation during 2017-18 #Reflects percentage point difference between 2018 and 2017 study findings (see 2017 study); shows only statistically significant differences at 90% confidence levels.

Countertops First to Go

Countertops, sinks, and backsplashes are the most common upgrades during kitchen renovations (94%, 89% and 88%, respectively). While the majority of renovating homeowners also choose to replace cabinets and/or all appliances (82% and 59%, respectively), urbanites are even more likely than suburban or rural dwellers to replace them.



*Percentages reflect proportion of homeowners who have completed, are currently working on, or are planning a kitchen renovation during 2017-18

More Choose to Enlarge

More homeowners (40%) are choosing to increase their kitchen size compared with those in the previous two studies (36% in 2016-17 and 37% in 2015-16). Rural homeowners are the most likely to enlarge their kitchens (46%) compared with the suburban (37%) and urban renovators (40%), and they also have the largest kitchens after upgrades.



*Percentages reflect proportion of homeowners who have completed, are currently working on, or are planning a kitchen renovation during 2017-18. **Percentages reflect proportion of homeowners who completed, were working on, or were planning a kitchen renovation during 2015-16 (see 2016 study), 2016-17 (see 2017 study), and 2017-18.

'U' Is Out, 'L' Is In

Half of homeowners (50%) update their kitchen layout during a renovation, an increase compared with two years ago (47%). The U-shaped layout is no longer the most popular option (32%), as the L-shaped layout made significant gains in popularity compared with two years ago (35% vs. 27% in 2015-16). Galley and single-wall layouts are also gaining ground.



*Percentages reflect proportion of homeowners who completed, were working on, or were planning a kitchen renovation during 2015-16 (see 2016 study) and 2017-18. **Percentages reflect proportion of homeowners who changed their kitchen layout as part of their completed, current, or planned kitchen renovation during 2017-18.



Blurring the Kitchen Lines

Half of renovating homeowners open their kitchen to other interior spaces (49%), with a completely open transition (56%) or double doors (23%) being the most common. One in five homeowners (18%) made their kitchen more open to the outdoors, most commonly by installing exterior double doors or single doors (42% and 29%, respectively).



MAKING THE KITCHEN MORE OPEN TO OTHER SPACES*

*Percentages reflect proportion of homeowners who have completed, are currently working on, or are planning a kitchen renovation during 2017-18. **Percentages reflect proportion of homeowners who are making their kitchen more open as part of their completed, current, or planned kitchen renovation during 2017-18.



Help Wanted

Nearly nine in 10 kitchen renovators (85%) hire help for their projects, with urban and suburban homeowners significantly more likely than rural dwellers to hire a pro (89% and 87% vs. 78%, respectively). General contractors and kitchen remodelers are hired by nearly two-thirds of renovating homeowners on a combined basis (52% and 11%, respectively), while one in five (22%) hires specialty service providers such as electricians or plumbers directly, without a general contractor (22%).

HIRING PROFESSIONAL HELP*

Rural Suburban Urban



*Percentages reflect proportion of homeowners who have completed, are currently working on, or are planning a kitchen renovation during 2017-18. **Specialty service providers refers to electrician, plumber, tile specialist, cabinet maker, and other trades.; project managers refers to general contractors and remodelers.

Look and Feel

Style and Storage Matter Above All

Similar to past findings, the majority of homeowners prioritize storage over all other functions of their kitchens, with ease of working, playing, living, or entertaining not far behind. Aside from function, style and beauty are considered the most important aspects of a well-designed kitchen.

TOP FUNCTIONAL AND DESIGN PRIORITES OF UPGRADED KITCHENS*



*Percentages reflect proportion of homeowners who have completed, are currently working on, or are planning a kitchen renovation during 2017-18.

Toward a Middle Ground

More homeowners (87%) are choosing a style makeover in 2017-18 kitchen renovations than in the previous two studies (75% in 2016-17 and 77% in 2015-16). Iconic styles such as modern and traditional appear to be falling out of favor somewhat, as homeowners lean toward transitional, contemporary, and farmhouse styles. Style preferences vary significantly across urban, suburban, and rural dwellers. (See Appendix p. 35.)

Changes to Style by Project Year*

75%

2016-17

87%

2017-18

KITCHEN STYLE CHANGES DURING UPGRADES

77%

2015-16



*Percentages reflect proportion of homeowners who completed, were working on, or were planning a kitchen renovation during 2015-16 (see 2016 study), 2016-17 (see 2017 study), and 2017-18. **Percentages reflect proportion of homeowners who are changing the style of their kitchen as part of their completed, current, or planned kitchen renovation during 2017-18.

White and Wood Make It Good

White continues to gain in popularity in updated kitchens, with white countertops, backsplashes, and wall finishes gaining six percentage points each compared with the previous years study. (For example, white countertops increased to 27% in 2017-18 from 21% in 2016-17.) White is even more popular in urban and suburban kitchens compared with rural areas. The choice of wood flooring is also on the rise (52% in 2017-18 vs. 49% in 2016-17).

Cabinets Appliances Stainless steel 73% 43% White 9% White 25% Wood Black stainless 8% 9% Grav Black 5% Multi-colored 7% 1% Multi-colored 4% Brown Countertops Backsplash +6pp# Multi-colored 27% White 36% 27% +6pp# Multi-colored 19% White -4pp# 15% 13% Grav Grav 8% 11% Beige Black -4pp# 6% Blue 5% +1pp# Beige Floors Walls 27% 52% +3pp# Wood Gray 24% 13% White +6pp# Grav 21% 10% Beige Brown 7% 9% Blue Beige 6% -2pp# Multi-colored 7% Green

POPULAR COLOR CHOICES*

*Percentages reflect proportion of homeowners who have completed, are currently working on, or are planning a kitchen renovation during 2017-18. #Reflects percentage point difference between 2018 and 2017 study findings (see 2017 study); shows only statistically significant differences at 90% confidence levels.

Products and Finishes

No Runaway Dishes

Among renovating homeowners who are upgrading their cabinets (82%), many opt for built-in storage to help with decluttering. Pullout waste/recycling bins (67%), utensil organizers (35%), and wine/bar storage (20%) are significantly more popular compared with just the last year (63%, 30%, and 15%, respectively), and more homeowners have warmed up to the idea of dish organizers over the last three years.

BUILT-IN SPECIALTY STORAGE IN UPGRADED KITCHEN CABINETS*



*Percentages reflect proportion of homeowners who are updating cabinets as part of their completed, current, or planned kitchen renovation during 2017-18. **Percentages reflect proportion of homeowners who completed, were working on, or were planning a kitchen renovation during 2015-16 (see **2016 study**), 2016-17 (see **2017 study**) and 2017-18 #Reflects percentage point differences between 2018 and 2017 study findings (see **2017 study**); shows only statistically significant differences at 90% confidence levels.

Shaker, Not Raised

Most homeowners upgrading their kitchen cabinets opt for custom or semi-custom cabinetry (40% and 34%, respectively), although a significant share of urbanites choose ready-to-assemble cabinetry. Homeowners are increasingly leaning toward Shaker cabinet styles (57%) and away from the raised-panel door styles (17%) compared with two years ago. After Shaker, urbanites disproportionately favor flat-panel styles.



*Percentages reflect proportion of homeowners who are *updating cabinets* as part of their completed, current or planned kitchen renovation during 2017-18. **Percentages reflect proportion of homeowners who are *updating cabinets* as part of their completed, current or planned kitchen renovation 2015-16 (see **2016 study**) and 2017-18. #Reflect percentage point difference between 2018 and 2017 study findings (see **2017 study**); shows only statistically significant differences at 90% confidence levels.

Engineered Quartz Now #1

Countertops are the top feature upgraded in kitchen renovations (94% of renovating homeowners) and engineered quartz is now the most popular material for them (43%), having a greater share in 2017-18 compared with the previous two years (41% in 2016-17 and 38% in 2015-16 projects, respectively). In contrast, the classic look of granite is on a three-year decline (34%, 40% and 43%, respectively).



*Percentages reflect proportion of homeowners who are updating countertops as part of their completed, current, or planned kitchen renovation during 2017-18. ***Natural stone* refers to countertop materials selected during countertop upgrades such as Granite (34%), Quartzite (8%) Marble (6%) and Soapstone (5% of upgraded countertops). #Reflects percentage point difference between 2018 and 2017 study findings (see <u>2017 study</u>); shows only statistically significant differences at 90% confidence levels.

Wood-Like Flooring on the Rise

One in two homeowners are choosing wood or wood-like materials (53% combined), among those updating their flooring (73%). While natural hardwood continues to be the most popular (29%), its popularity is on a decline (34%, 31% and 29% percent in 2015-16, 2016-17, and 2017-18 projects, respectively). In contrast, wood-like flooring such as engineered wood or laminate are on the rise (19%, 21% and 24% percent, respectively). Hardwood is most favored by urbanites (see Appendix p. 36).



*Percentages reflect proportion of homeowners who are updating flooring as part of their completed, current, or planned kitchen renovation during 2017-18. **Percentages reflect proportion of homeowners who are updating wall finishes as part of their completed, current, or planned kitchen renovation during 2017-18. #Reflects percentage point difference between 2018 and 2017 study findings (see <u>2017 study</u>); shows only statistically significant differences at 90% confidence levels.

Appliances With a Side of Tech

Nine in 10 homeowners replace all or some appliances during kitchen renovations (90%), with refrigerators and dishwashers the most common upgrades. High-tech features such as color-touchscreen controls or built-in speakers appear in one in four new appliances (25%). Wireless and voice-controlled appliances are in 11% of upgraded appliances (combined) in 2017-18 projects and are markedly gaining in popularity.



*Percentages reflect proportion of homeowners who are updating appliances as part of their completed, current, or planned kitchen renovation during 2017-18. **Percentages reflect proportion of homeowners who completed, are working on or are planning a kitchen renovation during 2015-16 (see <u>2016 study</u>), 2016-17 (see <u>2017 study</u>) and 2017-18.

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Tech Assistant in the Kitchen

One in seven homeowners incorporates new electronics in the kitchen during renovations (14%). Among them, TVs are significantly less desirable in 2017-18 projects (64%) compared with two years ago (79% in 2015-16). Home assistants are becoming increasingly popular, as evidenced by many being added during kitchen upgrades (22%). Certain new electronics, such as wireless speakers and central control panels for home systems, are particularly favored in urban areas.

UPGRADED ELECTRONICS IN KITCHENS*

Rural Suburban Urban



*Percentages reflect proportion of homeowners who are updating electronics as part of their completed, current, or planned kitchen renovation during 2017-18.

Kitchen Best Sellers

Five of the most popular kitchen categories for the Houzz Shop in 2017 are below, including a best seller for each.



* Links to the product, clockwise from the left: Rockwell 33" Apron Front 2-Bowl Sink, Sundance Kitchen Cart with Wood Top, Kendall 24" Counter Stool, Faventia Ceramic Floor/ Wall Tiles, Euro-Style Stainless Steel Range Hood

Methodology



APPROACH

Houzz is an all-in-one resource for homeowners working on a home renovation or decorating project. Our large and engaged user community is able to provide unprecedented insights on the latest market trends based on users' home improvement activity. We aggregate and share these insights with the community to give people greater confidence in the choices they make for their homes, and to give home professionals greater insights into their clients' wants and needs. With these goals in mind Houzz conducted an online quantitative survey of registered Houzz users regarding kitchen renovation projects, fielded between Sept. 17 and Oct. 11, 2017.

COMPLETES AND QUALIFICATIONS

The 56-question survey gathered information from Houzz users who reported to be 18 years old or older and homeowners. Additionally, respondents were required to have completed a kitchen remodel or addition project in the previous 12 months, to be currently working on one, or planning to start one in the next three months. The final sample consists of 1,734 respondents with a kitchen project. Additionally, in the instances of by-area reporting for kitchen projects, 309, 402, and 1,016 respondents fell in the urban, rural, and suburban segments, respectively.

SAMPLING AND WEIGHTING

Data were gathered via a link in the Houzz newsletter sent out by email twice a week to registered Houzz users. The link invited homeowners to share their kitchen project details, and then subsequently terminated people who do not meet the qualification criteria above were then eliminated. Respondents and people who did not meet the qualification were notified that aggregate findings would be shared with the larger Houzz community to help others in completing their own kitchen renovations. The final data were reviewed to ensure representativeness of the Houzz user populations.



Appendices

A. Kitchen Renovation Choices by Segment

Style After Renovation	Rural	Suburban	Urban
Transitional	15%	30%	20%
Contemporary	9%	17%	24%
Farmhouse	24%	9%	8%
Rustic	7%	2%	2%
Appliances	Rural	Suburban	Urban
Range(s)	71%	72%	86%
Cooktops(s)	47%	47%	32%
Wall oven(s)	38%	38%	26%
Voice-activated controls	1%	2%	3%
Built-in speakers	4%	6%	8%
Built-In Features	Rural	Suburban	Urban
Built-in desk/buffet	16%	11%	9%
Built-In Specialty Storage	Rural	Suburban	Urban
Cookie sheet/tray organizer	62%	54%	49%
Revolving corner trays (Lazy Susan)	43%	45%	34%
Spice organizer	42%	44%	37%

B. Kitchen Renovation Choices by Segment

Wall Materials	Rural	Suburban	Urban
Exposed brick	4%	2%	10%
Quartzite	1%	4%	4%
Hardwood	7%	2%	0%
Granite	4%	2%	5%
Floor Materials	Rural	Suburban	Urban
Hardwood	24%	30%	34%
Ceramic or porcelain tile	20%	26%	29%
Laminate	14%	19%	7%
Countertop Materials	Rural	Suburban	Urban
Butcher block or wood slab	18%	11%	12%
Quartzite	3%	9%	9%
Marble	6%	4%	9%
Soapstone	6%	3%	7%
Concrete	5%	2%	2%
Functional Priorities	Rural	Suburban	Urban
Easy to entertain	59%	63%	71%
Easy to host family gatherings	37%	40%	46%
Design Priorities	Rural	Suburban	Urban
Stylish and beautiful	54%	63%	61%
Adds to resale value	18%	29%	20%
Gourmet/pro-style cooking setup	13%	17%	19%

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C. Kitchen Renovation Choices by Segment

Colors	Rural	Suburban	Urban
White cabinets	30%	48%	43%
White countertops	19%	29%	29%
White backsplash	27%	38%	39%
White floors	2%	2%	3%
White walls	20%	22%	34%
Wood flooring	51%	55%	48%

D. Links to Resources on Houzz

Houzz is the easiest way for people to find inspiration, get advice, buy products, and hire the professionals they need to help turn their ideas into reality.

PHOTOS	FIND PROS	BROWSE PRODUCTS	ARTICLES
Kitchen	Architects & Building Designers	Kitchen & Dining Furniture	Kitchen Makeovers
Kitchen/Dining Room	Cabinets & Cabinetry	Tabletop	Kitchen Workbook
Great Room	Design-Build Firms	Major Kitchen Appliances	Kitchen of the Week
Enclosed	General Contractors	Small Kitchen Appliances	Small Kitchens
L-shaped Kitchen	Home Builders	Kitchen Storage & Organization	Colorful Kitchens
U-shaped Kitchen	Interior Designers and Decorators	Kitchen Tools & Gadgets	White Kitchens
Galley	Kitchen & Bath Designers	Kitchen & Table Linens	Kitchen Styles
Single-wall	Kitchen & Bath Remodelers	Cookware & Bakeware	Kitchen Backsplashes
Contemporary Kitchen	Carpenters	Kitchen Knives & Accessories	Kitchen Cabinets
Modern Kitchen		Tile	Kitchen Storage
Transitional Kitchen		Kitchen and Cabinet Lighting	Kitchen Counters
		Kitchen Fixtures	Kitchen Islands
			Kitchen Layouts
			Kitchen Lighting
			Kitchen Pantries
			Kitchen Sinks