

# Housewares TrendTracker 2005



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# **About Housewares TrendTracker 2005**

Trend Tracker 2005, published by Riedel Marketing Group (RMG), delivers insight into the major trends that will impact the housewares industry over the next few years. The purpose of the report is to enable marketers and manufacturers of home goods and housewares products to anticipate what products and services consumers will want and need.

Riedel Marketing Group has been tracking housewares and home goods trends since 1999.

The primary source of insight used to shed light on the major trends of 2005 is primary consumer research conducted by Riedel Marketing Group with the company's proprietary HomeTrend Influentials Panel (HIP).

HomeTrend Influentials (HIPsters) are the consumers who are the first to jump on important new home-related trends, are the initial adopters of important new products for the home, and wield tremendous influence over mainstream consumers who take their purchase cues from these trendsetters.

By tracking and monitoring the home-related habits and practices and buying behaviors of a panel of these influential consumers, RMG is able to keep a finger on the pulse of what these trendsetting consumers are doing and thinking and buying, the new products they are embracing, and the new products they are rejecting.

The foundation for RMG's innovative research methodology is market research firm RoperASW's 30 years of research into a group they call the "Influentials". Roper has determined that the 10 percent of the population that is the most socially and politically active tells the other 90 percent how to vote, where to eat and what to buy. According to RoperASW, Influentials tend to be two to five years ahead of the public on many important trends, such as the adoption of major technologies (personal computers or cell phones) or new ideas such as the movement of recent years to rebalance work and family. Roper asserts that few important trends reach the mainstream without passing through the Influentials in the early stages. Influentials can stop a would-be trend in its tracks; they give the thumbs-up that propels a trend or the thumbs-down that relegates it to a short 15 minutes of fame. Influentials are the "early majority" for the nation and the consumer marketplace.

In addition to tracking the habits and practices of HomeTrend Influentials, RMG gleans insight from market research conducted by other market research companies and trade associations. Research by the following companies has been cited in this report: Harvard's Joint Center for Housing Studies, Bureau of the Census, Bureau of Labor Statistics, ACNielsen, the NPD Group, and Unity Marketing.

# **Trends to Watch in 2005**

## CHANGES IN DEMOGRAPHICS

The demographic groups that spend the most on home goods will increase by almost 600,000 households in 2005.

There will be 240,000 more married couple households headed by a person in the 45-to-54 age group and 350,000 more married couple households headed by a person in the 55-to-64 age group in 2005 than there were in 2004, according to the Bureau of the Census.

Projected Growth in Number of Married Person Households from 2004 to 2005 by Age Group				
	# of U.S. households		chg vs 04	% chg vs 04
	2004	2005		
total	56,988,327	57,370,994	382,667	0.67%
25-34	8,173,614	8,079,034	-94,580	-1.17%
35-44	12,975,570	12,713,781	-261,789	-2.06%
45-54	14,251,370	14,493,910	242,540	1.67%
55-64	9,744,689	10,096,708	352,019	3.49%
65-74	6,169,977	6,228,830	58,853	0.94%
>75	4,205,916	4,290,678	84,762	1.98%

Source: Bureau of the Census Projections of Household by Type of Household and Age of Householder, series 1

This bodes well for sales of housewares products because, according to the Bureau of Labor Statistics, married couple households between the ages 45 and 64 spend more on household furnishings and equipment than any other demographic group.

Household Furnishings & Equipment Spending, 2002							
Average Spending by AGE RANGE							
	Total	under 25	25 - 34	35 - 44	45 - 54	55 - 64	65+
Household Furnishings Total	\$1,518	\$812	\$1,469	\$1,823	\$1,900	\$1,811	\$903

Source: Bureau of Labor Statistics Consumer Expenditure Survey

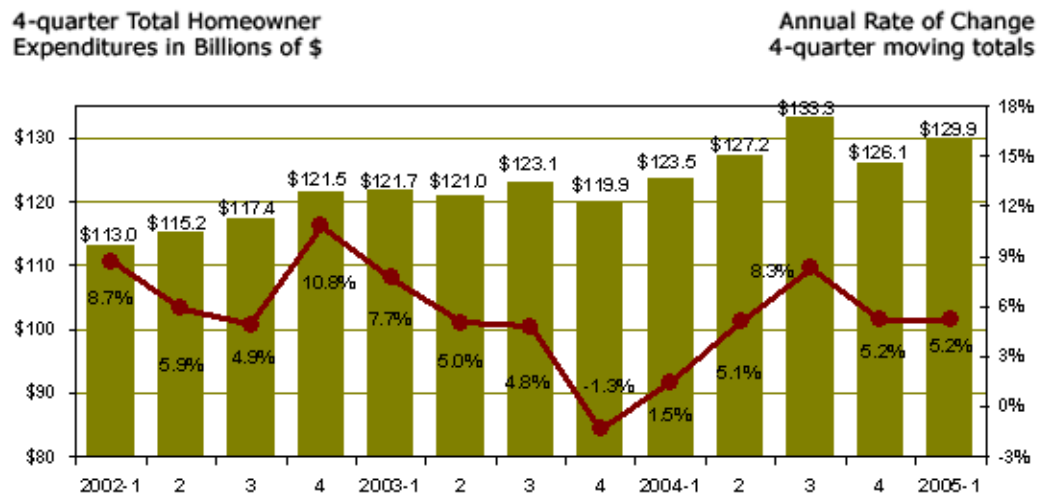
Household Furnishings & Equipment Spending, 1999						
Average Spending by HOUSEHOLD COMPOSITION						
	Total	Married/ Total	Married/ No Kids	Married W/Kids	Single Parent	Single Person
Household Furnishings Total	\$1,518	\$2,104	\$2,027	\$2,212	\$886	\$925

Source: Bureau of Labor Statistics Consumer Expenditure Survey

## REMODELING FEVER

Americans have had home improvement and remodeling fever for longer than I have been publishing Housewares TrendTracker reports and this preoccupation with remodeling and home improvement shows no sign of abating.

- According to the National Association of the Remodeling Industry (NARI), twenty-six million home owners make some kind of improvement to their homes each year. More than a million homes undergo major renovation or remodeling each year, up from 680,000 homes in 1985.
- The number of homeowners spending at least \$10,000 on major modifications such as kitchen and bath remodeling, room additions, or structural alterations has exceeded those buying new homes in the USA every year since 1987.
- According to the Remodeling Activity Indicator (RAI) devised by Harvard's Joint Center for Housing Studies, homeowners spent \$130 billion on home improvements in the past year, up from \$113 billion in 2001.



Source: Joint Center for Housing Studies.

- HomeTrend Influentials, who tend to be two to five years ahead of the public on many important trends, show no signs of losing interest in home improvement. HIPsters are always doing something to their home or planning to do something to their home in the future. Typically, a HIPster can easily

reel off a list of things that they are planning to do to their homes – short-term and long-term projects, minor home improvements and major remodeling projects. At least half of the HIPsters have remodeled at least one room in their home in the past several years and a number of HIPsters are planning to remodel in the next year or so.

The reasons for remodeling fever are three-fold.

1. The first reason is financial: a home is still the largest investment the average American makes. Home owners want to protect their investment. So, they do the projects that are needed to maintain their home and the projects – like adding new rooms – that will increase the value of their home.
2. The second reason is the escalating cost of real estate in many parts of the country. Many people are debating whether they should sell and move to an area where they can buy more home for the money or whether they should stay and invest in their current home. Many are deciding to stay put and remodel.
3. The third reason is that Americans are, as Faith Popcorn puts it, “building the perfect environment to reflect one’s personal needs and fantasies.” Research by Roper Starch Worldwide, a leading global marketing research and consulting firm, reveals that the American home is serving an ever increasing variety of functions, all of which need a space and equipment. While the majority of Americans have traditionally described their homes as “private retreats” and “family havens”, they are increasingly describing their homes as “entertainment centers”, hobby centers, learning centers, and galleries.



## THE NEW LIVING ROOM

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The hottest new room of the house is not even in the house; it is in the backyard. The backyard is at the heart of a trend growing in North America by leaps and bounds: the development of outdoor rooms that are comparable in design and construction to indoor family rooms or great rooms.

According to Outdoor Living Market 2005 published by Unity Marketing, 40% of home owners have plans to invest in a major outdoor living project and are expected to spend at least twice as much as the typical consumer on outdoor living purchases in 2005. Americans spent \$15.7 billion on products that enhance their outdoor living experience, such as furniture, decorative accents for garden, porch and patio, statuary, grills, and water features like ponds and fountains. Unity Marketing predicts that the next five years will be a period of strong growth for the outdoor living consumer market, with the market growing by over 35% from 2005 to 2010.

Today's patios and outdoor rooms are not the concrete slab patios of old that were furnished with inexpensive plastic table and chairs or cast off furniture. Melissa Birdsong, Lowe's Director of Trend & Design, describes today's outdoor room as similar to an indoor room, but with walls formed by trees, hedges or fences connecting to the home's exterior walls.

A great example of this trend towards "resort-quality" outdoor spaces can be found at the home of one of the Southern California HIPsters. They built an outdoor bar last summer. Looking at this bar area with its refrigerator, fiber optic lighting, stainless steel grill, seating for eight, and thatched roof, you would think that you were in a four-star resort hotel rather than in the backyard of a private upper middle class home.



## **THE NEXT ROOM TO BE REMODELED**

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The tiny, dimly lit laundry room stashed away in a corner of the basement or garage is a thing of the past. Americans are no longer willing to put up with an ugly, inconveniently located laundry room.

Slightly less than half of HIPsters have done something to their laundry room in the past year to make the laundry room a more pleasant space. Projects have included painting or wallpapering; adding better lighting; adding storage space, shelving, and/or space to hang clothes in the laundry room; and moving the laundry room out of the basement or garage into a more conveniently located area of the house. Several HIPsters added a new laundry room during their latest remodeling project.

More than half of HIPsters are planning to do something to their laundry room in the next year or so. A number want to add shelves and/or space for hanging clothes. Others say they want to clean out cabinets or reorganize the shelves in their laundry room. Several are planning to paint their laundry rooms and one is planning to remodel the laundry room along with the kitchen.

## **MAKING HOUSE CLEANING EASIER**

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The vast majority of Americans have recently made or will soon make some change in the way they clean their home or the products they use.

The majority of those who have made changes in the way they clean their home or are planning to make changes are changing when and how often they clean their home. They are not happy with the cleanliness of their homes and are trying to find better ways to keep on top of the house cleaning.

Some are doing a little bit of house cleaning every day instead of waiting to do a big clean-up once a week or so. One HIPster has found that “It takes less time to clean if it's not really that dirty”. Another has found that the house cleaning is less overwhelming if she cleans just one room or a small area of a room every day.

Others have done just the opposite and have set aside specific days for specific cleaning projects. For example, one HIPster has chosen one day a week to do the heavy duty cleaning to make sure it gets done weekly. Another has designated one day per week for house cleaning and laundry to help her stay on top of it all.

For some, the change they have made in their cleaning routine in the past year is that they have hired a house keeper or cleaning lady. Several are planning to hire a cleaning person to do “the heavy stuff”, the thorough cleaning, or specific chores.

Some are undertaking home improvement projects specifically to make housecleaning easier. For example, some are replacing carpet with tile or wood floors. Some are doing what one HIPster calls “streamlining the house” which means that they are getting rid of extra furniture and clutter so it will be easier to dust and sweep. Others are following the example of the HIPster who intentionally “eliminated all the frills such as curtains on windows and shower curtains” when she remodeled to cut down on the amount of housework she would have to do.

Because they are dissatisfied with the cleanliness of their homes and often feel overwhelmed by the task of keeping on top of the house cleaning, Americans eagerly embrace new household cleaning products that they think will help make house cleaning chores easier or less time consuming. Case in point: The vast majority of HIPsters are using a household cleaning product that they were not using a year ago. The new household cleaning products that are being given the thumbs up by HIPsters are the wet mop systems (the Swiffer Wet Jet and the Clorox Ready Mop), disposable wipes, disposable toilet bowl cleaners, and the Mr. Clean Magic Eraser.

## WHO IS DOING MORE COOKING?

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Among HIPster households, only four in ten households are spending more time now on meal preparation, household cleaning, laundry, or ironing than they did two years ago while four in ten are doing about the same amount of meal preparation, household cleaning, laundry, and ironing as they did two years ago.

Changes in the time spent on meal preparation, household cleaning, and garment care are directly related to changes in family size, household composition, and/or household dynamics.

The amount of meal preparation that is done tends to increase when family size increases (for example, a married couple has a child or an aging parent comes to live with the family); when the children move from infancy into the toddler stage and school-age children move into the teen years; when a woman who worked outside the home becomes a stay-at-home mom, and when a family member is diagnosed with an illness that requires dietary changes. The amount of meal preparation that is done tends to decrease when children move into their school-age years; when the amount of time the householder is spending at work or school increases; and when children leave home. When there are no major changes in household size, structure or dynamics, the amount of meal preparation typically does not change.

Changes in the amount of household cleaning being done in a household is directly related to the presence of children, the age of the children, and pets in the household. Plain and simple, the house gets dirtier when there are children and pets in the household. The house gets dirtier when children move from babyhood to toddler phase and from toddler phase to school age. The house gets dirtier when pets are added to the mix. When nothing has changed in the household – no additional children, children are not moving from one significant life stage to another, no new pets – the amount of house cleaning being done tends to stay about the same over time.

The amount of laundry is directly correlated to changes in household dynamics. Some are doing more laundry than they did a couple of years ago because they now have children. Some are doing more laundry now than they did two years ago because they have more children now than they did two years ago. Some are doing more laundry because their children are getting older. As the children get older, they are much more active, they “change their clothes a lot”, “their clothes are bigger and they have more of them” and “they care about how they look.” While most of the

HIPsters who have children report that the amount of laundry they do has increased as the children get older, a few report that the amount of laundry they have to do has either stayed the same or actually decreased as their children have gotten older. One says that the amount of laundry she is doing has decreased, because her daughter is older and doesn't seem to go through as many outfits as she used to. Another reports that her kids are older and not as messy. Most of the HIPsters who do not have children living in the household are not doing any more laundry than they did two years ago.

## SWING OF THE PENDULUM

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In last few decades of the 20th Century, with women's liberation and more women entering the workforce, American women rejected their mothers' and grandmothers' ways of keeping house and standards of household cleanliness. They lowered their expectations of how clean their homes should be and decided that there were more important things in life than a home that would pass the white glove test. They got so busy with work and outside activities that they stopped cooking and their families stopped sitting down together to eat dinner.

Now, the pendulum is swinging back regarding household activities. There is a return to old fashioned values regarding household cleanliness and family meals. But American women have no interest in having to do things the old fashioned time-consuming way nor do they necessarily have the skills.

Today's consumers want to be able to serve a home-cooked meal made with fresh ingredients to a family who sits down all together to eat the evening meal. However, they are not willing to spend hours in the kitchen every day preparing a meal made entirely from scratch. So they are embracing products and services that will allow them to put a good home-cooked nutritious meal on the table in the least amount of time. That is why such food products as bagged salad and pre-grated cheeses are so popular and concepts such as Dream Dinners are starting up around the U.S.: they allow today's consumer to provide meals made with fresh ingredients without having to do all the work themselves.

Today's consumers want a clean and tidy house of which they can be proud. However, they are not willing to spend hours a day cleaning the house at the expense of other activities. So they are embracing new household cleaning products and are hiring house cleaning services so that they can have a clean and tidy house without having to spend hours on house cleaning chores.

## EATING FOR HEALTH

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Americans are moving away from fad diets and toward what the St. Petersburg FL Times calls “a more centrist view of nutrition.” As Phil Lempert, a food-trend analyst for the Today show and ACNielsen, puts it, “The No. 1 diet in 2005 is no diet.”

The popularity of low carb diets such as Atkins and the South Beach Diet is waning. According to the NPD Group, a food marketing research group, the number of Americans who say that they are on a low-carb regime has fallen from 12% of the population to about 4%.

As usual, HIPsters are early adopters of new dietary trends. When asked what changes they have made in the way they prepare meals, the vast majority of HIPsters reported that they are trying to cook and eat healthier. Cooking healthier means first and foremost, more fresh vegetables; almost all of the HIPsters report that they are trying to incorporate more fresh vegetables into their family’s diet. Cooking healthier also means fresh ingredients; less frozen, prepared, or boxed food and more fresh ingredients.

The primary reason for this change to a healthier balanced diet is not so much for weight loss but rather for overall health. Most HIPsters say that they are trying to eat a healthier diet because they have become more health conscious.

The new “no-diet” diet – a well-balanced diet in moderation – means that all food groups, even grains, and especially fruits and vegetables are being embraced. For example, instead of cutting out all carbohydrates as advocated by such diets as Atkins and South Beach, the focus is shifting to increasing the consumption of “good” carbs (I.E. whole grains) and decreasing the consumption of the “bad” carbs (the so-called “white” carbs such as sugar and processed flour).

Another aspect of the well-balanced diet trend is the promotion of certain food groups as being particular good for you. Certain ordinary everyday foods are being promoted as having superpowers when it comes to weight loss, cancer prevention, and longevity. The 5-a-Day program being promoted by the National Institutes of Cancer and National Center for Chronic Disease Prevention and Health Promotion as well as food manufacturers such as Dole advocates consumption of at least five servings of fruits and vegetables every day. A book called “Superfoods Rx: Fourteen Foods That Will Change Your Life” advocates the consumption of such foods as beans, blueberries, broccoli, oats, oranges, pumpkin, soy, spinach, green or black

tea, tomatoes, turkey, walnuts, wild salmon, and yogurt. The dairy industry and certain food manufacturers such as General Mills, the producer of Yoplait yogurt, are heavily advertising the benefits of consumption of three servings of dairy products a day. Likewise, the apple industry is promoting the 3-Apple-a-Day Plan which advocates eating three fresh apples every day, one before each meal.



## RETURN TO THE HOME-COOKED MEAL

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Despite the myriad of convenience foods and home meal replacements that have been introduced by food manufacturers in the past few years, American consumers prefer to serve a home-cooked meal made with fresh ingredients.

HIPsters place a much higher priority on providing wholesome home-cooked meals than on getting dinner on the table in the shortest amount of time with the least amount of effort. When asked which of two phrases most closely reflected how they feel, the vast majority of HIPsters selected the statement “My priority is to provide wholesome home-cooked meals”. Only a handful selected the statement “my priority is to get dinner on the table in the shortest amount of time with the least amount of effort.”

HIPsters prepare home cooked meals from scratch most of the time and use very few pre-cooked ready-to-serve meals or pre-packaged ready-to-cook meals. When asked which of two phrases most closely reflected how they feel, nine out of twelve selected the statement “I prepare home cooked meals from scratch most of the time.” Two selected the statement “I use pre-cooked ready to serve meals or pre-packaged ready to cook meals most of the time.”

## **NOT ENOUGH HOURS IN THE DAY**

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Time is the enemy for today's American woman, especially those with families. There are just not enough hours in the day to get everything done.

So, consumers are trying to be more efficient in how they spend their time. There are three ways they are doing this:

- They are letting someone else do some of the work.

For example, in the area of meal preparation, consumers are letting someone else do some of the time-consuming prep work for them. They are letting the food industry do their salad making for them, marinate their chicken, chop their garlic and grate their cheese. They are letting supermarkets prepare a fresh entrees for them so that all they have to do is heat the meal up. They are going to Dream Dinners where they can assemble a week's worth of meals after the Dream Dinners staff has done all the time-consuming pre-preparation such as chopping all the vegetables and measuring the spices.

In the area of meal clean-up, the person who prepared the meal is delegating meal clean-up to others in the household.

In the area of house cleaning, more and more consumers are hiring a house cleaning service to come in and do the house work.

In the area of laundry, they are letting someone else (for example, the dry cleaner) do the ironing.

- They are changing the way they do things to save time and effort later.

For example, some HIPsters talked about how they avoid using some appliances and equipment (IE the food processor) for meal preparation because they add to the amount of clean-up that has to be done. Some use their barbeque grill frequently specifically to cut down on the number of pots and pans that need to be washed. Some refuse to use any type of cookware, bakeware, or kitchen tool that cannot be washed in the dishwasher.

Several HIPsters talked about how they are establishing specific household cleaning routines or schedules so they can stay on top of the cleaning chores so the house never gets really dirty.

To avoid having to iron, many HIPsters go to great lengths to make sure they get the clothes out of the dryer before they have a chance to wrinkle. Many HIPsters purposely buy clothing that does not need ironing and avoid buying things that will require ironing.

- They are using time saving products.

For example, several HIPsters have started using home food delivery services. Many HIPsters swear by the Swiffer and the disposable wet mop systems like the Swiffer Wet Jet and Clorox Ready Mop. A number of HIPster use OxyClean so they don't have to take the time to pre-treat stained clothes.

## **COLOR APPLIANCES ARE BACK**

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For several decades since the end of era of harvest gold and avocado green appliances, people have shied away from colorful appliances, even in small appliances. Although the portable appliance industry has been pushing color in small kitchen electrics for a number of years, by and large, consumers have been sticking with black, white, and stainless steel small kitchen electrics. For example, even though many HIPsters have embraced stainless steel refrigerators, dishwashers, and stoves, more than half of HIPster households have white or black kitchen appliances (both major and small) and the vast majority have white washers and dryers.

That appears to be changing. If HIPsters are any indication, consumers appear to be ready to embrace color appliances again. For example, HIPsters are overwhelmingly complimentary about the recently introduced line of Sears Elite washers and dryers that come in three designer colors (Pacific Blue, Champagne, and Sedona). They like the idea of a color washer because it adds some fun to a boring job, adds some cheer to a drab room, and makes the laundry room not look so much like a laundry room. (The only problem is that because so many of the HIPsters have bought a new washer and dryer in the past couple of years, they would not actually buy one of the new color washers and dryers; they simply are not in the market for a washer and dryer.)

The other indicator that Americans are ready to move beyond stainless steel into brighter colors is the reaction a small core group of HIPsters had to color appliances when I took them to the 2005 International Home and Housewares Show a couple of weeks ago. They loved Hamilton Beach's Eclectrics™ line of small kitchen electrics that come in an number of designer colors including pineapple, intrigue blue (a softer, lighter hue of blue than cobalt blue), seascape (a kind of turquoise-blue), apple, and Moroccan red. So taken were they with the Eclectrics line that several of them would have purchased the entire line of five appliances on the spot if they could have.

# **HIPsters Weigh in on What's “In” and What's “Out” for 2005**

There is a surprising amount of agreement among HIPsters regarding what is going to be “in” in 2005 and what is going to be “out”.

- Big flat screen and wall mounted televisions will explode in popularity in 2005 because the prices are coming down. Big boxy TVs that sit on the floor and huge entertainment centers or armoires to hide those house big boxy TVs will be “out”.
- More traditional home furnishings will be “in” in 2005: larger pieces of furniture but less of them, more romance, more “frills”, lace and softness, oak. The ultramodern, stark, sleek contemporary/modern look with lots of chrome and glass will be “out”.
- Stainless steel major kitchen appliances will still be “in” in 2005 and for many years to come but some new color will start to emerge at the very high end. HIPsters are not sure what the new color is going to be. One HIPster hypothesized that it “may be something luminescent like the material used for iPod and iBooks.” Another thinks that bold kitchen appliances will be “in”.
- Bold colors are “in” for 2005, not just on interior walls, but also on exterior walls, appliances (large and small), home furnishings, and bedding. The auto industry has been venturing into new colors that have never been used on cars before; the same will be true in the home furnishings industry. White anything (except dinnerware) will be “out”.
- For kitchen counters, natural stone materials, especially granite, is “in”. By far the most popular counter top among HIPsters is granite. Those who have recently remodeled their kitchens have installed granite counter tops. Those do not have granite counter tops plan to replace their current counter tops with granite when they remodel their kitchens. As granite starts to reach mainstream status, the very cutting edge consumers will start to switch to concrete or Silestone natural quartz surfacing for countertops. Countertops made of man-made materials, especially Formica and laminate, are “out”.
- Digital video recorders will be “in” in 2005 and VCRs will be “out”.
- Outdoor living rooms complete with high quality upholstered furniture and fireplaces and outdoor kitchens complete with big gas grills and refrigerators will be “in”. Cheap plastic patio furniture will be “out”.

- Family rooms and game rooms will be “in”. Formal living rooms will be “out”.
- Homes that reflect the personalities of the people who live there are “in”. Rooms that look the same as everyone else’s, that look like a Pottery Barn showroom are “out”.
- Larger, attractive, well-appointed, nicely decorated, bold colored, brightly lit laundry rooms that are near the main living space are “in”. Tiny, dingy, dark, damp, poorly-lit laundry rooms that are in the basement or garage are “out”.

# About Riedel Marketing Group



Riedel Marketing Group (RMG) – The Home Goods Marketing Specialist – is a marketing resource for housewares manufacturers and marketers.

A.J. Riedel, Senior Partner of Riedel Marketing Group (RMG), is a highly regarded marketing authority and a leading forecaster of consumer trends. She has been providing strategic marketing planning services to housewares and home goods companies since 1991.

In early 2004, A.J. established a new trend forecasting service designed to help manufacturers and retailers to determine if their new products will be embraced by mainstream American consumers. Called the HomeTrend Influentials Panel (HIP), this service tracks and monitors what HomeTrend Influentials (or HIPsters) are doing, thinking, and buying. HIPsters are the consumers who are the first to jump on important new home-related trends, are the initial adopters of important new products for the home, and are sought out by mainstream consumers for opinions and advice about home products and home decorating.

In addition to offering trend forecasting and consulting services, A.J. publishes in-depth market reports and trend reports based on custom proprietary research data and comprehensive secondary research combined with executive interviewing of industry experts. Since 1994, RMG has published more than thirty syndicated consumer market research reports.

A.J. has spoken at numerous trade association meetings and trade shows including the 2005, 2003, 2002 and 2001 International Housewares Shows. She is frequently quoted in the business press including the Chicago Tribune, the Los Angeles Times, the Washington Post, the Boston Globe, the Philadelphia Inquirer, Wall Street Journal, as well as in industry trade publications.

After earning her MBA at UCLA, A.J. started her marketing career at General Mills where she helped jump start Wheaties cereal sales in the early 1980s. As Senior Product Manager at RJR Nabisco, she increased Grey Poupon sales and started development of a new Grey Poupon line extension that was successfully introduced in the late 1980s. As Marketing Manager at Norelco from 1987 through 1990, A.J. revitalized the air cleaner business and identified five significant new business opportunities. A.J. founded Riedel Marketing Group in 1991.