Mastercraft Brand Position Report

April 2025

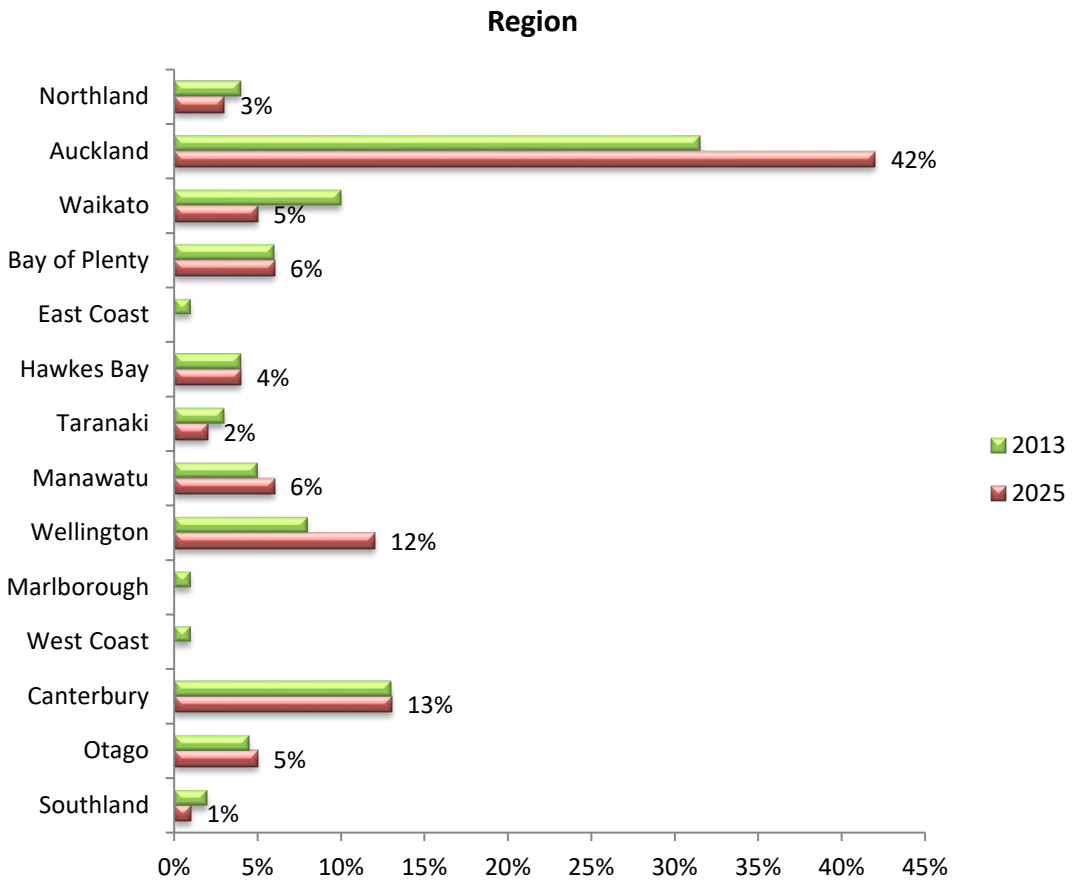
Background and Methodology

- Ignite Research conducted a brand position survey in 2013, and its now timely this position was updated.
- A new survey was conducted in April 2025 to update the current brand position.
- The qualifying target audience was major home decision makers aged 35-64 who were considering building or buying new, or renovating in the next 12 months. This time, we specifically aimed to target more households with a combined income of $100k+.
- Objectives of the research were to provide an updated understanding of:
  - Awareness of the Mastercraft brand and competitors
  - Key decision criteria
  - Perceptions of Mastercraft on key criteria
  - Information sources valued to help with purchase decisions
  - Interest in an all-in-one kitchen, plumbing and electrical supply company
  - Feedback on Trees for Survival sponsorship
  - Feedback on Youtube ads
  - NPS and reasons for rating
- An online survey was conducted through the research panel owned by Dynata (formerly Research Now).
- The total sample size achieved was n=425.

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Sample composition

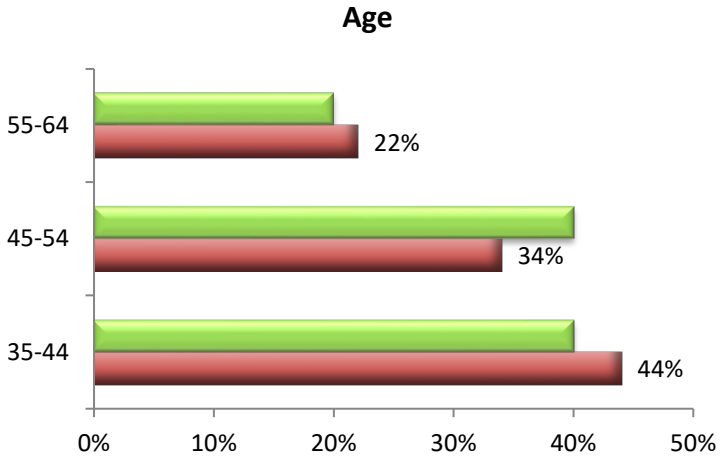
- The sample still reflects a representative geographic spread across New Zealand. This time, Nelson and Tasman were excluded and there was more sample from Auckland and Wellington.

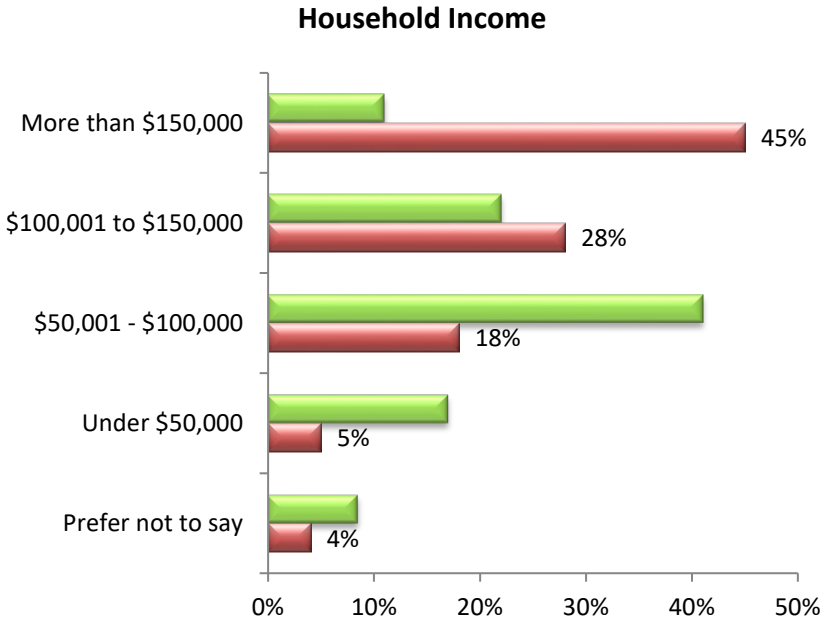


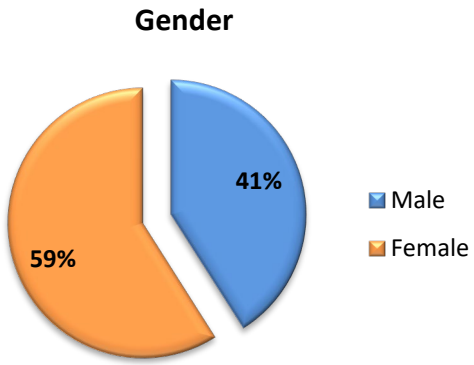
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Sample composition

- Compared with last time, the sample of decisions makers is made up of:
  - A similar gender proportion
  - Slightly more in the 35-44 age group
  - Many more in the higher household income category (due to targeting of higher income households). Note: HH incomes will be generally higher now anyway 12 years on.





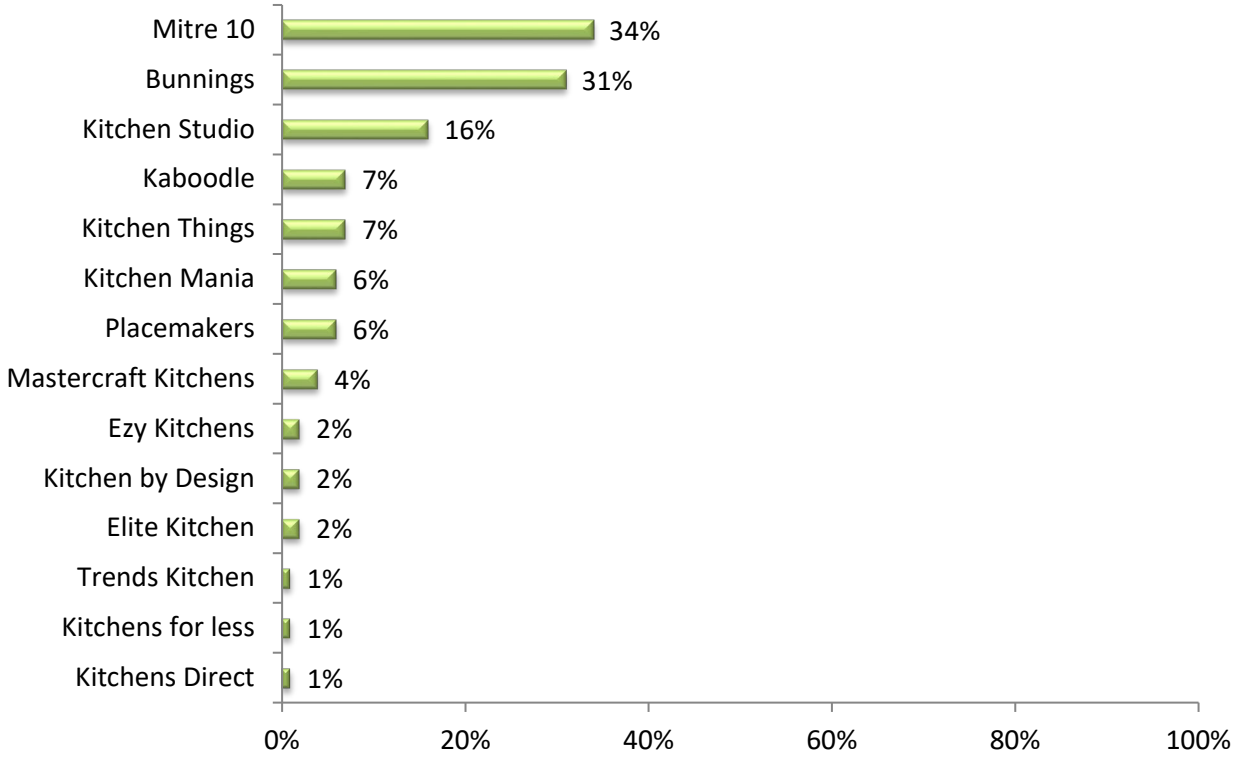


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Spontaneous recall of kitchen design / supply companies

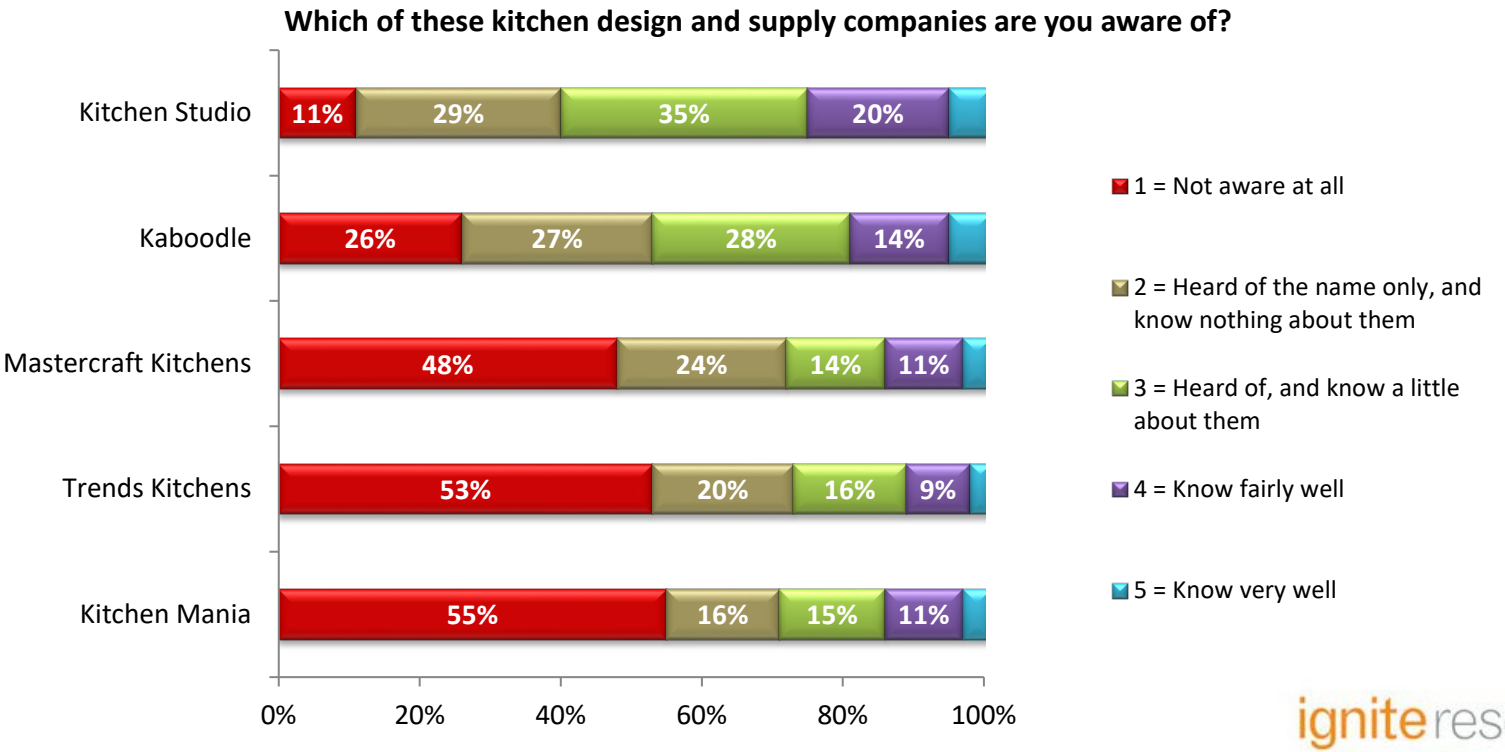
- Kitchen Studio remains the most highly recalled specialist kitchen design / supply company from a top of mind perspective.
- Mastercraft has a slightly higher top of mind profile to last time (4% vs 2.5%), but is still low and slightly behind Kitchen Things and Kitchen Mania.
- People continue to mainly recall the large building and home supply stores such as Mitre 10 and Bunnings when thinking about kitchen design and supply.

Please write down the names of kitchen design and supply companies that come to mind.



Awareness of kitchen design / supply companies

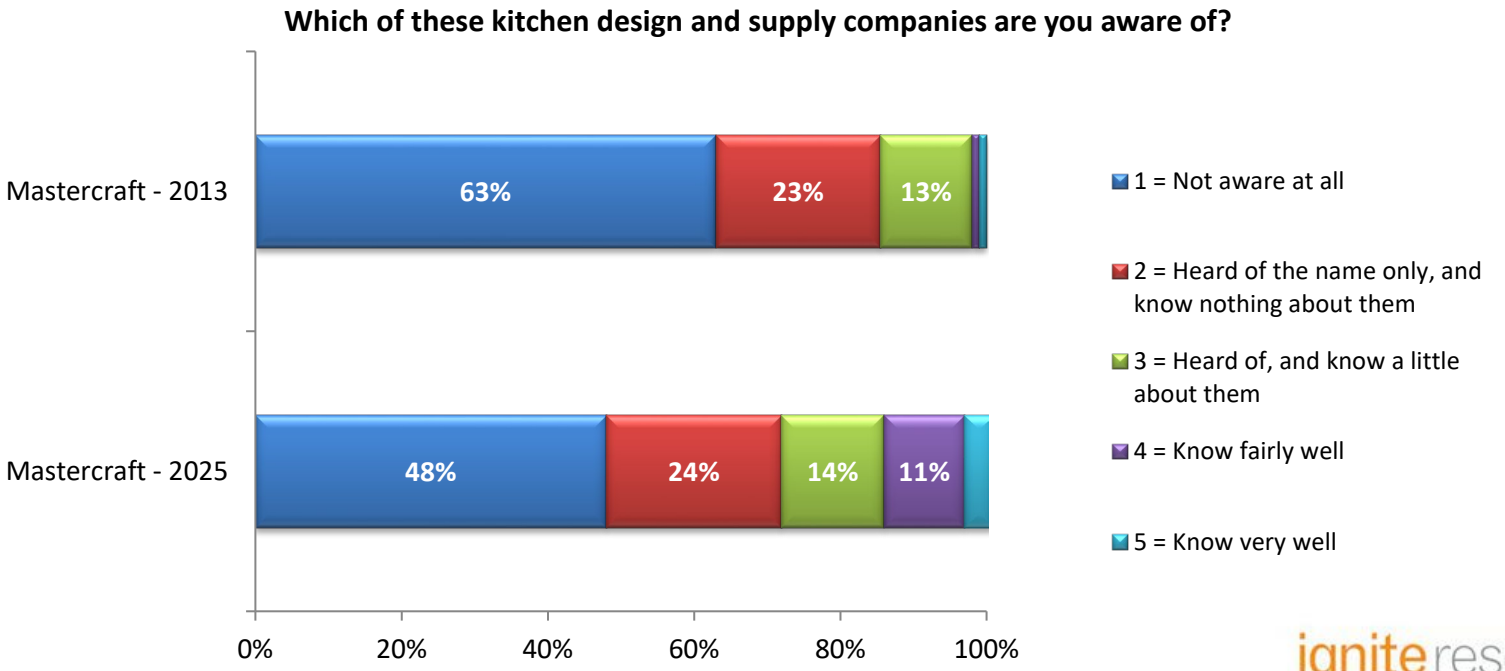
- When prompted, the target audience has the greatest awareness of, and familiarity, with Kitchen Studio.
- Kaboodle has attracted some awareness and appears a more well-known brand than Mastercraft.
- Promoted awareness of Mastercraft has increased to 52% (from 37% in 2013), with more people knowing more about the brand.
- Trends and Kitchen Mania are slightly less known than Mastercraft.



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Awareness of Mastercraft

- The level of familiarity with Mastercraft is higher (but that may be due, in part, to a higher income sample.
- Current awareness of Mastercraft is higher among:
  - 35-44 year olds (59%)
  - Males (69%) over females (40%)
  - People in Auckland (59%)
  - HH income above $200k (59%)
  - Families with mainly young children (67%)

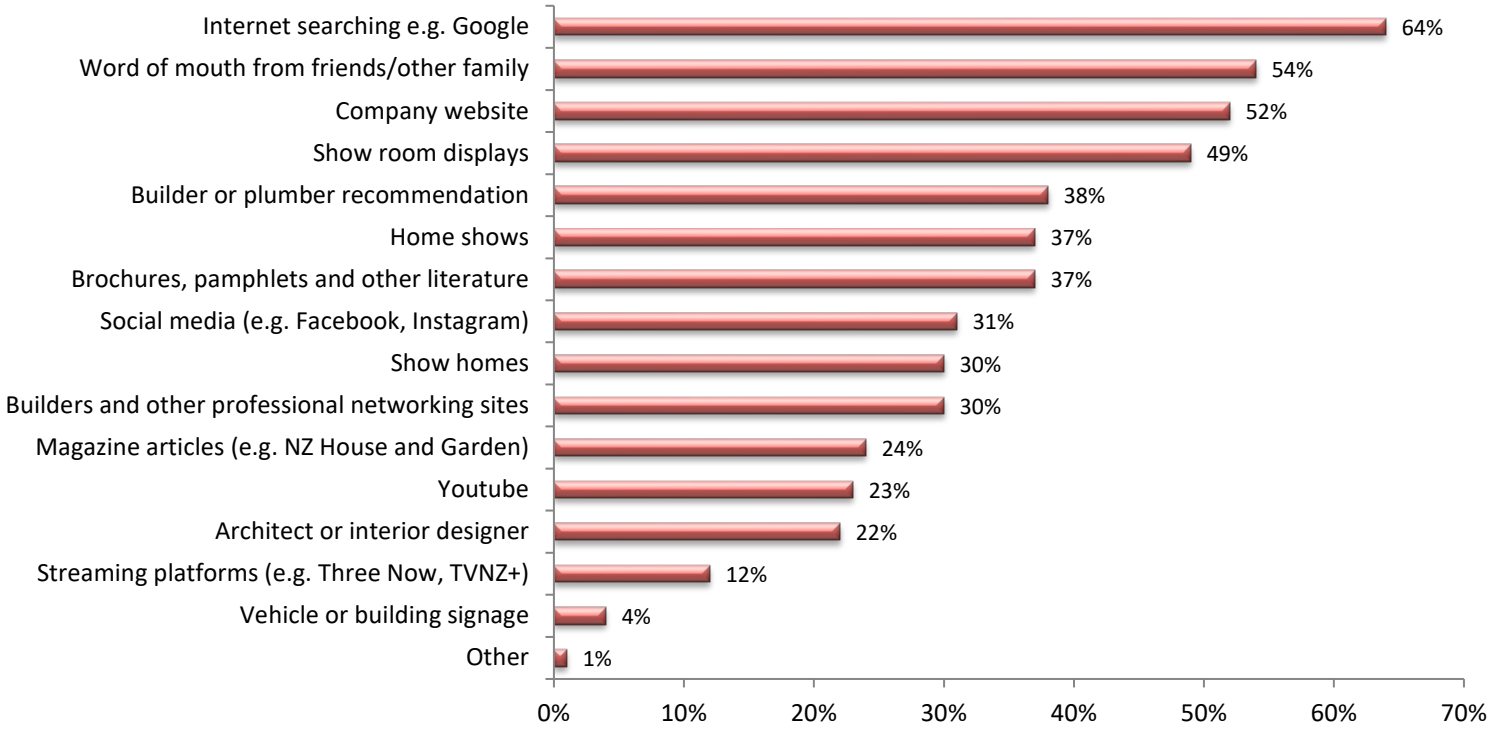


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Information sources valued

- Searching the internet remains the key platform that potential customers use to find out information about kitchen design / supply companies, as does searching on specific company websites. Being high on the search list and having a well designed website remain core to the decision process.
- People trust recommendations from people they know, and also what builders and plumbers say. Building a good referral network/programme is essential to the marketing efforts.
- People also like to visualize what (their) kitchen may look like through show room displays, and home shows.
- Social media is now a more prominent information source than it was 12 years ago, while traditional print sources have declined in value. Printed material material where images can be shown and talked about, therefore, still have a place.

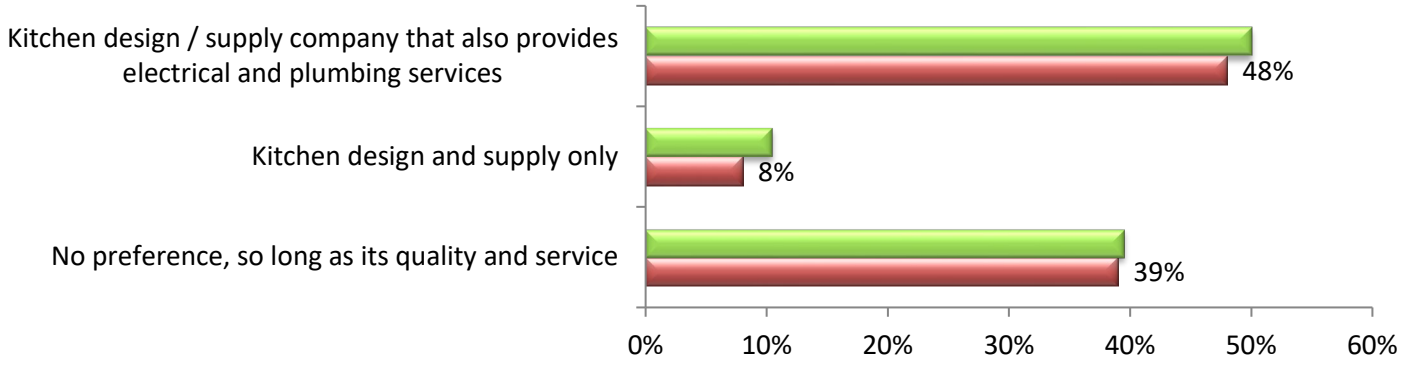
What sources of information would you use to find out about kitchen design and supply companies?



Ideal service offering

- There remains a clear preference for a one stop solution.
- Above all, the higher quality and service to be provided is paramount.

Would you prefer to use a kitchen design and supply company that also provides electrical and plumbing services, or one that does not offer these services?



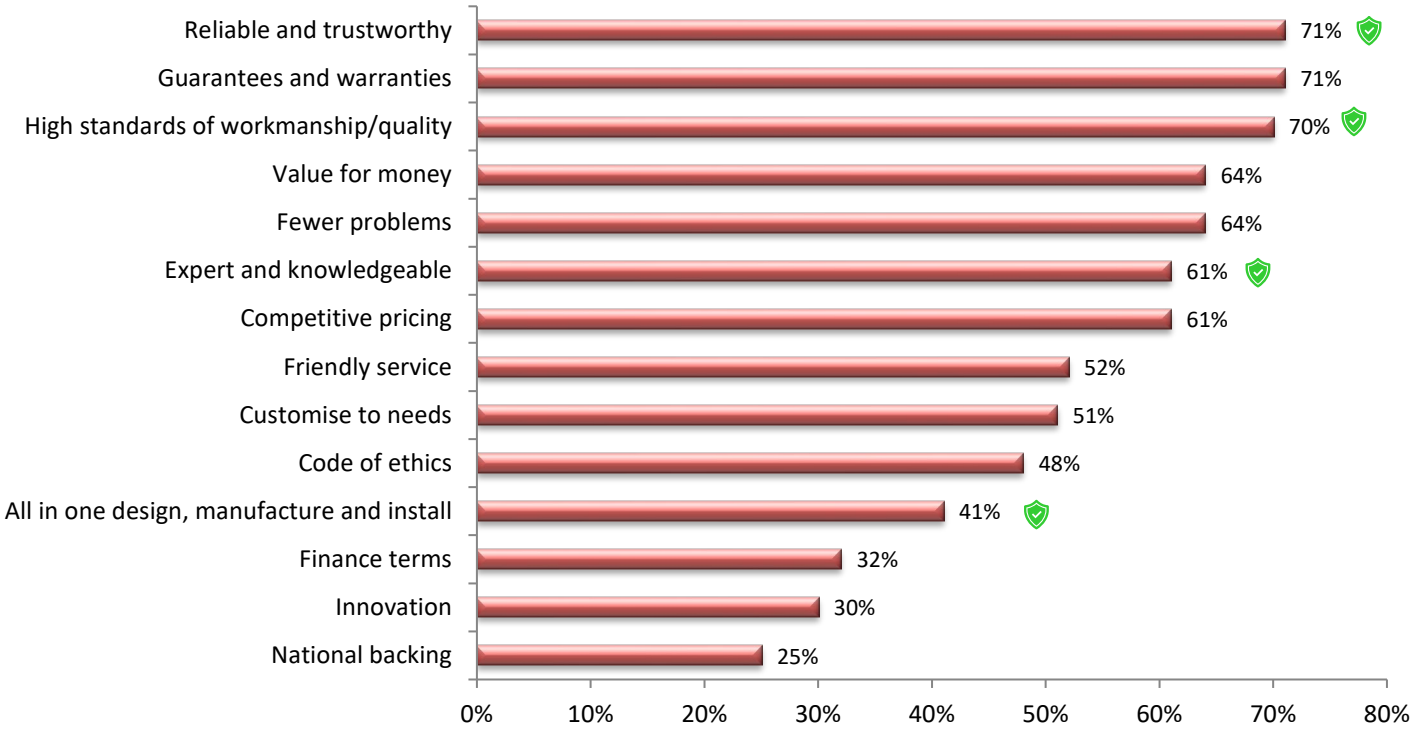
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Key factors when choosing a kitchen / design supply company

- To some extent, all attributes impact on the decision process.
- Most significant is that the company must demonstrate and instill trust. This is to be supported by high standards of workmanship and the provisions of guarantees and warranties if things go wrong. With the likelihood of fewer problems and value for money, people want peace mind backed with performance.
- A tick beside an attribute signifies where people aware of Mastercraft are more likely to associate that attribute with Mastercraft.

How important would the following factors be in helping you choose which kitchen design and install company to use?

% who say this attribute is very important

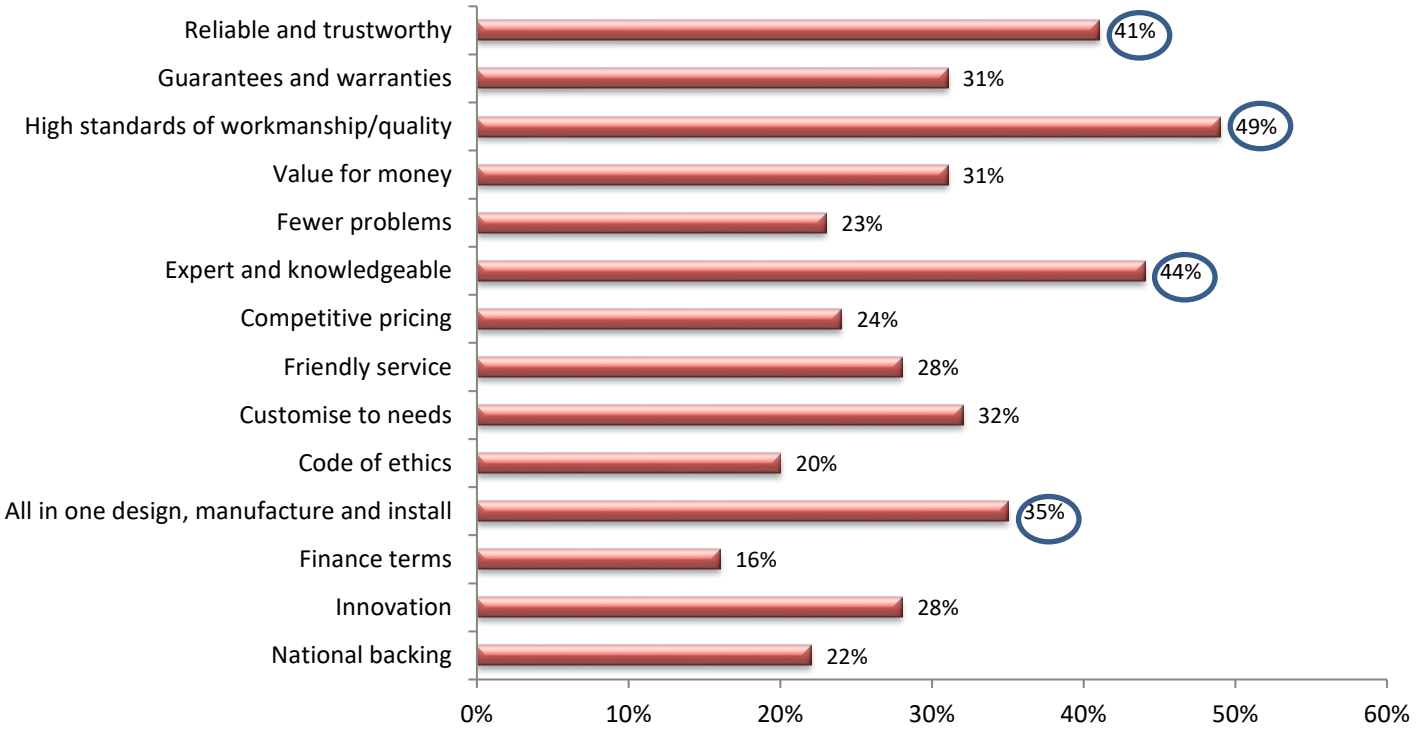


Key attribute associations with Mastercraft

- People aware of the brand were asked which ones they felt best described Mastercraft. The chart below is in order of most to least important in the decision process.
- Mastercraft is highly associated with reliability and trust, quality workmanship, and expertise and knowledge (all similar to last time).
- Key takeout is the need to push messaging on the provision of guarantees/warranties, and value for money (derived from competitive pricing and reliable, quality work).

Which of the following attributes best describes what you know about or think about Mastercraft?

% who say this attribute is very important



Logo Recognition

- Just under half the audience claimed to have seen at least one of the logos.
- The Kitchen logo resonated with more people than the other two.
- Higher income households ($200k+) generally had higher levels of awareness – Mastercraft Kitchens (32%), Electrical (16%) and Plumbing (19%) – as did households with mainly school age children.

Have you ever seen any of these logos before?







	%
Yes, Mastercraft Kitchens	25
Yes, Mastercraft Electrical	11
Yes, Mastercraft Plumbing	12
No, none of these	53
Not sure	14
Base: Total sample	**425**

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Trees for Survival

- Participants were shown a description of Mastercrafts's sponsorship of this programme.

> Mastercraft sponsors a programme called Trees for Survival Trees for Survival (TFS) is an environmental education programme which involves young people growing and planting native trees to help revegetate erosion prone land and improve stream flow and water quality. This also improves habitats for native birds & increases biodiversity. Mastercraft chose TFS because their values align with TFS as they both know the importance of the home and families and have a general care for future generations. By choosing Mastercraft you are directly helping to educate those future generations as well as protecting our beautiful environment.

- Clearly, knowing this about Mastercraft has a significant impact on potential consideration. 59% said that knowing this would favourably influence any future decisions to use Mastercraft.
- Those more likely to consider Mastercraft are 35-44 year olds, those who know something about Mastercraft already, and families with young kids.
- Positively, half of those who had never heard of Mastercraft before, or had heard the brand name only, would consider Mastercraft for their next kitchen job.

Knowing this now, does that make you more or less likely to consider Mastercraft for your next kitchen job?

	%
Much more likely	20
More likely	39
Makes no difference	38
Less likely	1
Much less likely	1
Base: Total sample	**425**

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Youtube ads

- Participants were shown two ads for Mastercraft Kitchens.



Why Choose Mastercraft Kitchens Reason #5

Mastercraft Services NZ Ltd • 44 views • 1 year ago



Why Choose Mastercraft Kitchens Reason #16

Mastercraft Services NZ Ltd • 50 views • 1 year ago

- One in five people (18%) said they had seen at least one of these before.
- Feedback was positive. Most people liked them and would also be motivated to consider Mastercraft for their next kitchen or cabinetry job.
- This feedback was consistent across all demo groups, including females – a group with lower awareness levels of Mastercraft.

What are your overall impressions of them?

Overall Impressions	Total %
I like them	38
I like them a little	27
Top 2 box	**65**
It is okay	31
I don't really like them	3
I'm not sure what I think	1
Base	**425**

Seeing these ads, would they motivate you to consider Mastercraft?

Consider Mastercraft?	Total %
Yes, a lot	29
Yes, a little	50
Top 2 box	**79**
No, not really	17
I'm not sure what I think	4
Base	**425**

NPS

- 44 people out of the 425 surveyed (or 10% of the sample) claimed to have used Mastercraft before for any kitchen, electrical or plumbing work. For households with incomes over $200k, and households with older children at home, this was 17%.
- Based off this relatively low base, NPS was an excellent 46.
- Reasons for customer advocacy include: quality outcome, professional team, assurances and guarantees, after sales service, good design, reflects the customer needs and tastes, an all-in-one package, and reputation of a national brand.
- The one Detractor referenced the kitchen design being “very standard”.

Based on your experience, how likely would you be to recommend them to someone else?

Promoters (9-10)	48
Passive (7-8)	50
Detractors (0-6)	2
NPS (P-D)	**46**
Base (used Mastercraft)	44

Key Insight Summary

- There was a slightly different sample this time that included a higher proportion of higher income households, and so direct comparisons with 2013 should be exercised with caution.
- That said, Mastercraft has a higher profile in the market than before, aso relative to some competitors like Trends and Kitchen Mania. There is a higher level of familiarity with the brand.
- There is still work to do to get people to not think of Mitre 10 and Bunnings, for example, when considering kitchen design and supply. And Kaboodle looks an emerging threat having snared a decent space in people's minds.
- Having an effective online presence is core to being on the consideration for many people – in terms of visibility and accessibility to searches, website design, networking sites, and a social media presence.
- Word of mouth recommendations are also critical to being considered, and the positive NPS score from customers shows the potential to leverage these assets.
- Opportunities to showcase Mastercraft's design and quality are also important. Show homes, home shows, printed material including magazines, can provide the visual attraction to the product and help generate that emotional connection.
- The three main things that people look for in choosing a company are Trust, Quality and Guarantees, with Value for Money coming in a close 4th.
- People trust Mastecraft and associate the brand with a quality product. So these attributes should be front and centre. There looks to be opportunity to strengthen messaging around guarantees and value for money, and using the digital marketing channels for gaining more effective and efficient cut through.
- The ads and Trees for Survival sponsorship resonate with most people and can influence future consideration for Mastercraft. How can these creatives and messaging reach a wider audience?