Research. Insight. Answers.

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# Consumer Attitudes on Battery

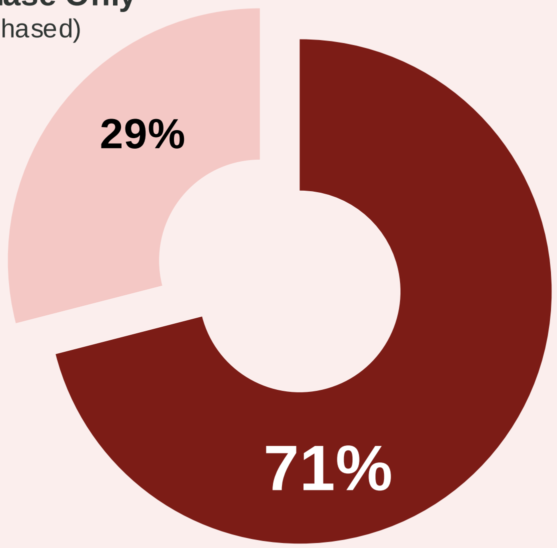
# Methodology

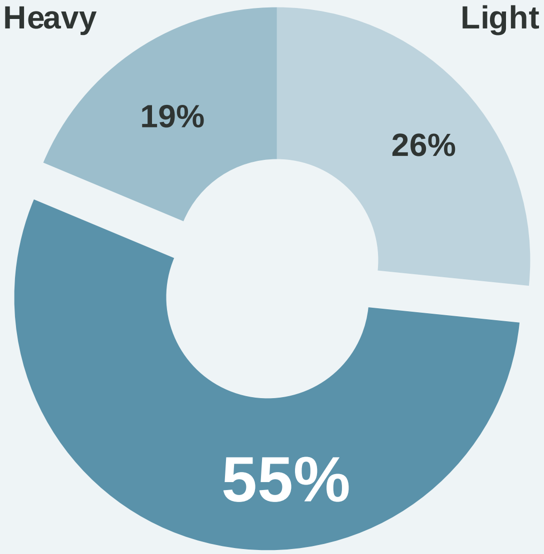
## Respondent Criteria

- Homeowner
- Have influence in the purchase and selection of home improvement products in their home
- Purchased outdoor power equipment in the past 12 months or plan to in the next 12 months
- Have a yard
- Are not in the Landscaping industry
- Perform light, moderate, or heavy DIY activity

## Project Methodology

- 603 online surveys were conducted in August 2024
- Data is trended back to similar studies conducted 2, 4, 6, and 8 years ago
- Length of survey is about 10 minutes
- Data is weighted to the 2022 study



# Objectives

1. Homeowners’ usage and attitudes towards battery powered OPE
2. Reasons homeowners consider or don’t consider battery powered OPE
3. Homeowners’ ownership and familiarity with robotic mowers

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Usage of Battery OPE

Attitudes Toward OPE Options

Awareness of Robotic Mowers

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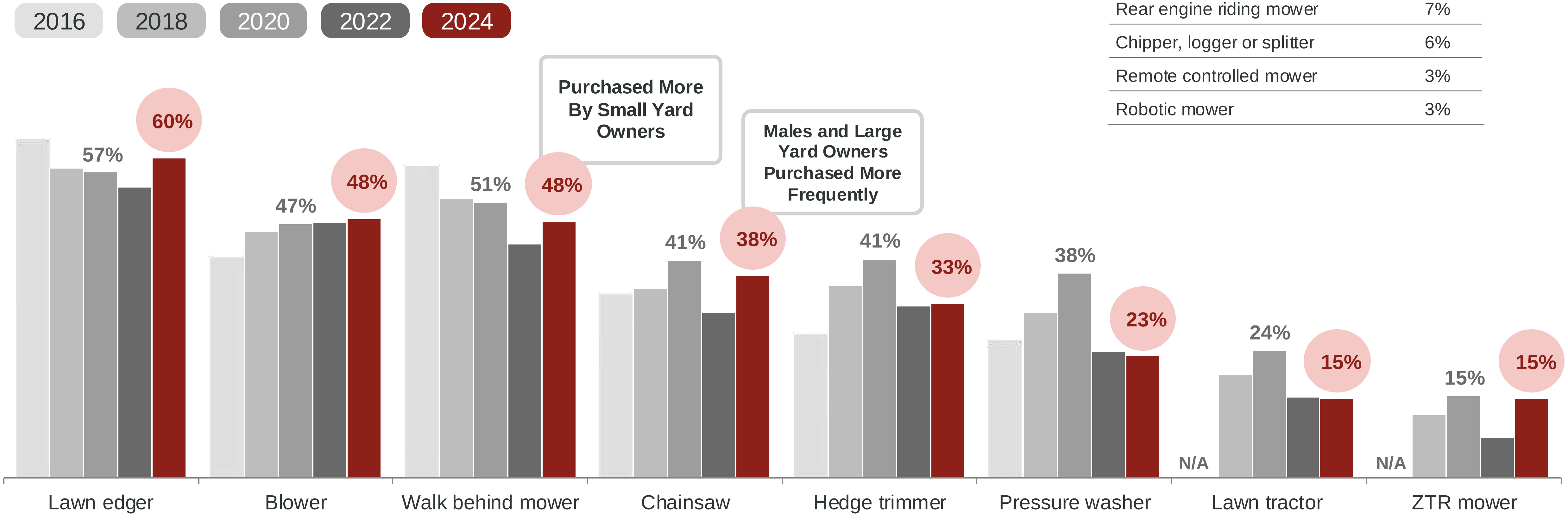
# Usage of Battery OPE

# OPE Purchases Dropped in 2022, but Many Return to Pre-Pandemic Levels

## OPE Purchased In Last 12 Months – By Year

(Of those who purchased OPE)




| Additional responses | 2024 |
|---|---|
| Slow blower | 11% |
| Rear engine riding mower | 7% |
| Chipper, logger or splitter | 6% |
| Remote controlled mower | 3% |
| Robotic mower | 3% |

Lawn tractor, ZTR mower, Rear engine riding mower, and Chipper, logger or splitter were not asked in 2016, due to a focus on smaller battery powered OPE. Robotic and Remote-controlled mowers added in 2022.

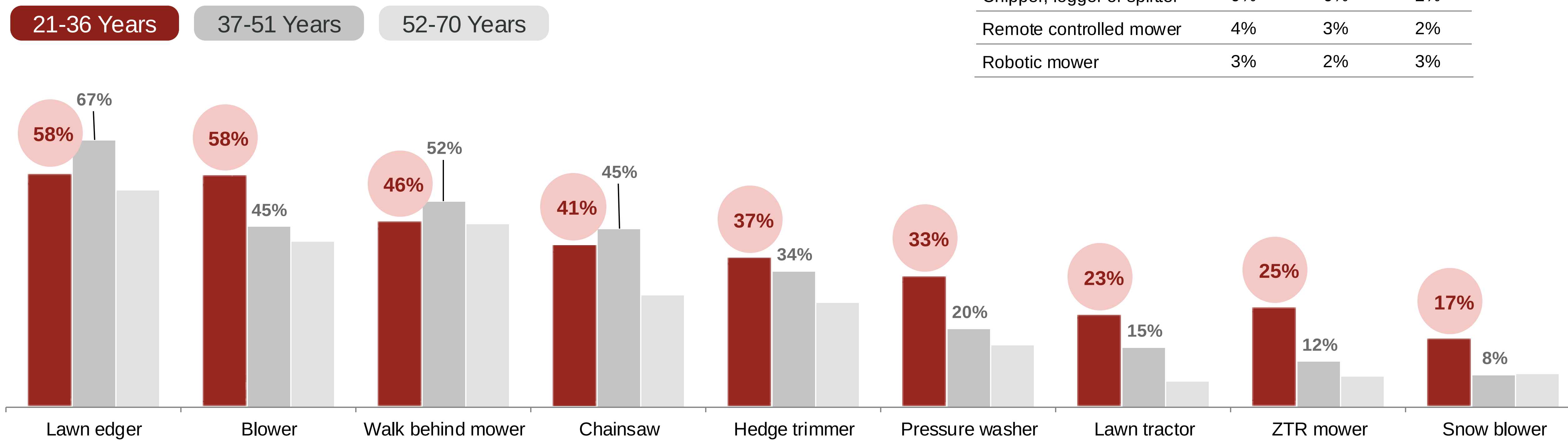
# Younger Homeowners Consistently Purchase More Outdoor Power Equipment

## A Steady Trend Observed Over Several Years

### OPE Purchased In Last 12 Months – By Age

(Of those who purchased OPE)

| Additional responses | 21-36 | 37-51 | 52-70 |
|---|---|---|---|
| Rear engine riding mower | 9% | 7% | 5% |
| Chipper, logger or splitter | 9% | 6% | 2% |
| Remote controlled mower | 4% | 3% | 2% |
| Robotic mower | 3% | 2% | 3% |

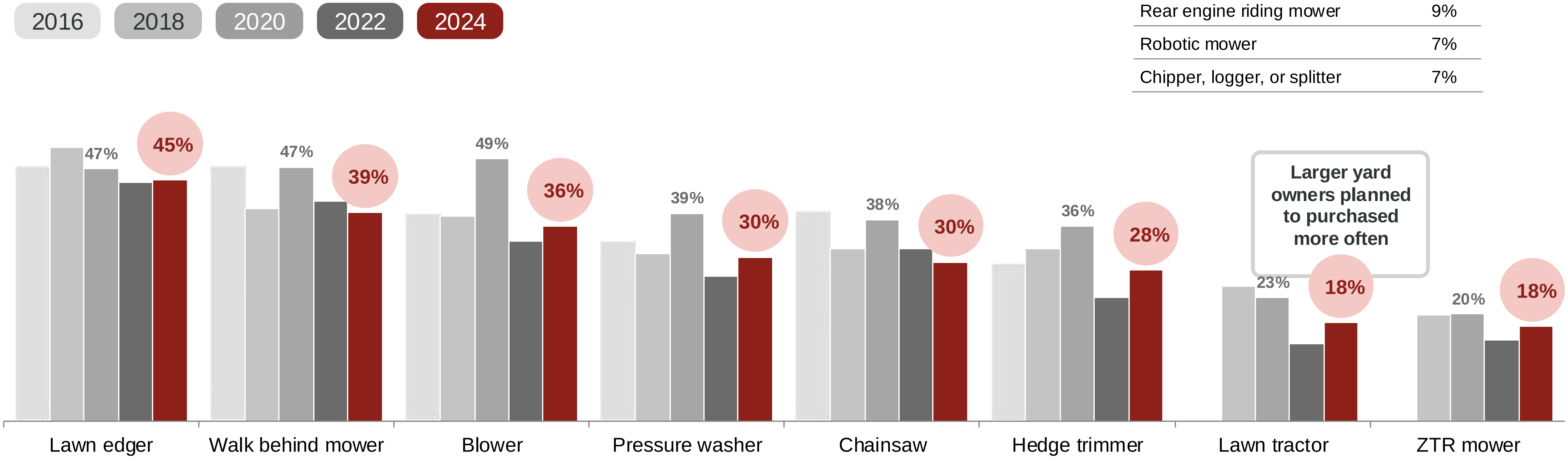



Lawn tractor, ZTR mower, Rear engine riding mower, and Chipper, logger or splitter were not asked in 2016, due to a focus on smaller battery powered OPE. Robotic and Remote controlled mowers added in 2022.

# Planned Purchases Returning to Pre-Pandemic Levels, with Expected Increases in 2025+

## OPE Plan To Purchase In Next 12 Months – By Year
(Of those who plan to purchase OPE)

| Additional responses | 2024 |
|---|---|
| Slow blower | 17% |
| Remote controlled mower | 11% |
| Rear engine riding mower | 9% |
| Robotic mower | 7% |
| Chipper, logger, or splitter | 7% |

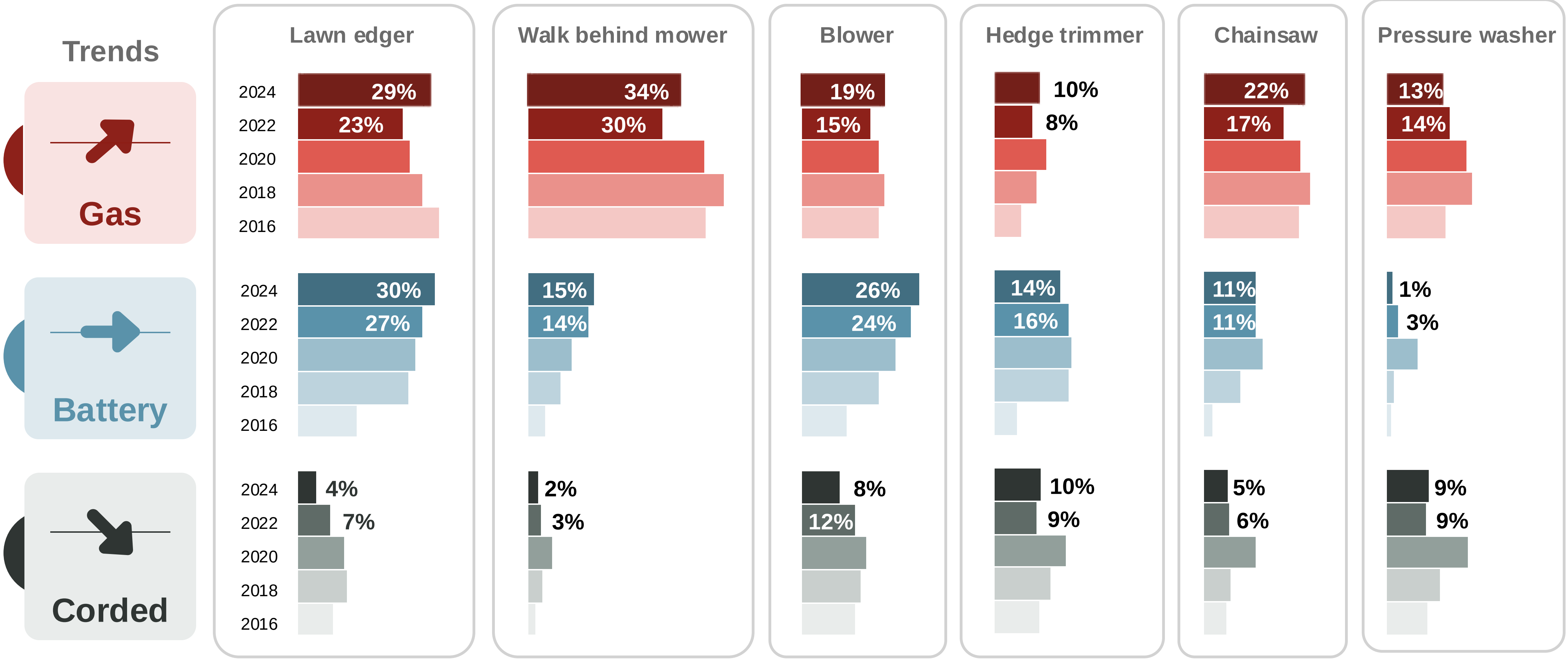



Lawn tractor, ZTR mower, Rear engine riding mower, and Chipper, logger or splitter were not asked in 2016, due to a focus on smaller battery powered OPE. Robotic and Remote controlled mowers added in 2022.

# Battery Growth Slows as Gas Purchases Rise

## Gas and Battery continue to take share from corded in many categories.

**OPE Purchased In Last 12 Months – By Type** (Of those who purchased OPE)

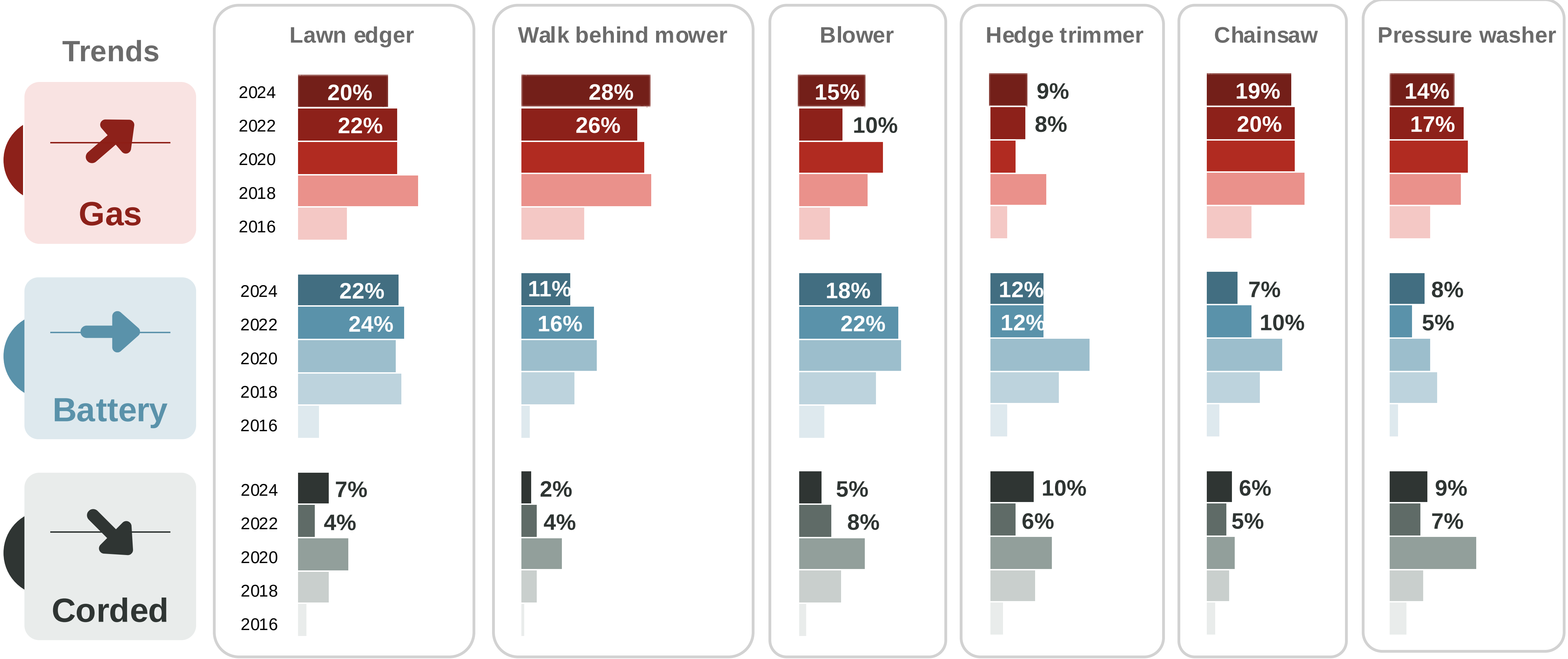



Includes top responses. Totals may exceed 100% due to multiple responses.

# Battery Expectations Flat or Down

## Walk-Behinds Seeing Biggest Shift Since 2022

OPE Planning To Purchase In Next 12 Months – By Type (Of those who plan to purchase OPE)



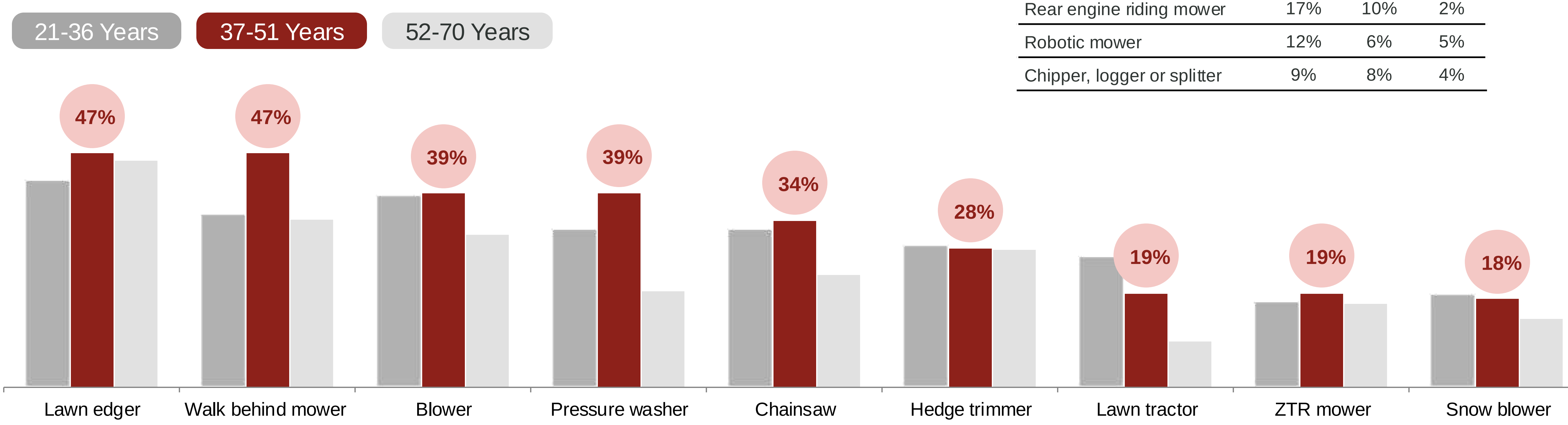

Includes top responses. Totals may exceed 100% due to multiple responses.

# Middle-Aged Consumers Present the Strongest Market Buying Opportunity

## Older Consumers Plan to Buy Less, While First-Time Home Buyers Average Around 34-35

### OPE Plan To Purchase In Next 12 Months – By Age

(Of those who plan to purchase OPE)




| Additional responses | 21-36 | 37-51 | 52-70 |
|---|---|---|---|
| Remote controlled mower | 14% | 9% | 9% |
| Rear engine riding mower | 17% | 10% | 2% |
| Robotic mower | 12% | 6% | 5% |
| Chipper, logger or splitter | 9% | 8% | 4% |

Lawn tractor, ZTR mower, Rear engine riding mower, and Chipper, logger or splitter were not asked in 2016, due to a focus on smaller battery powered OPE. Robotic and Remote controlled mowers added in 2022.

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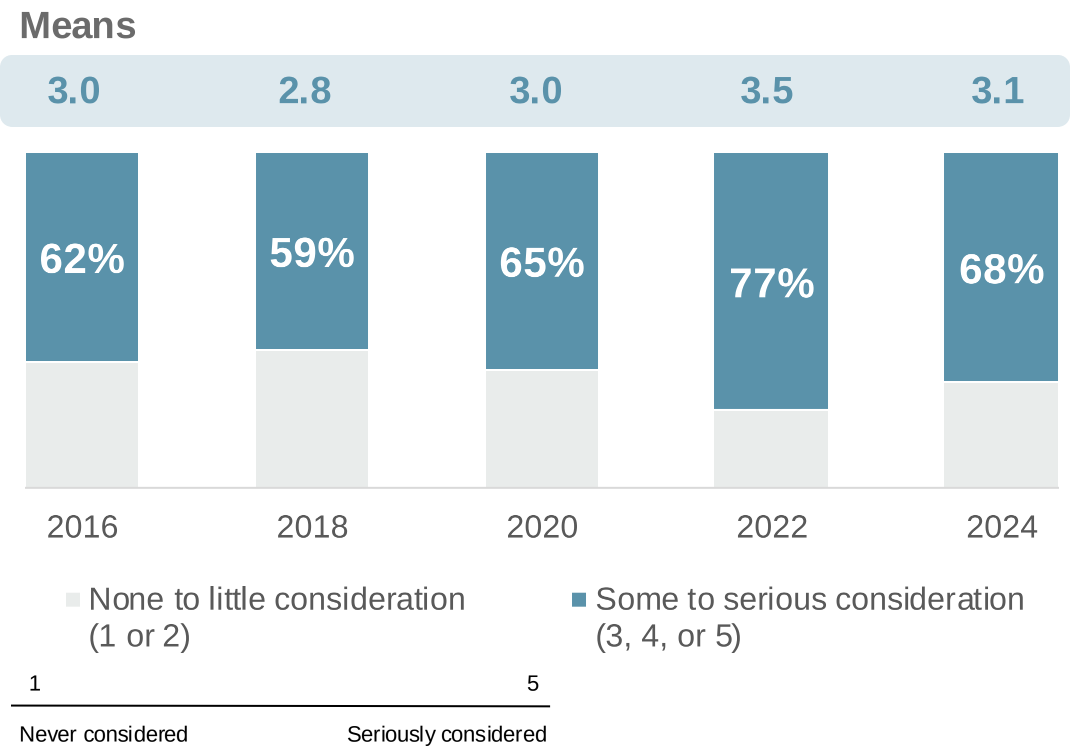
# Attitudes Towards Battery and Gas Powered OPE

# Battery Consideration Matches Recent Purchases, Stabilizing at Pre-Pandemic Levels

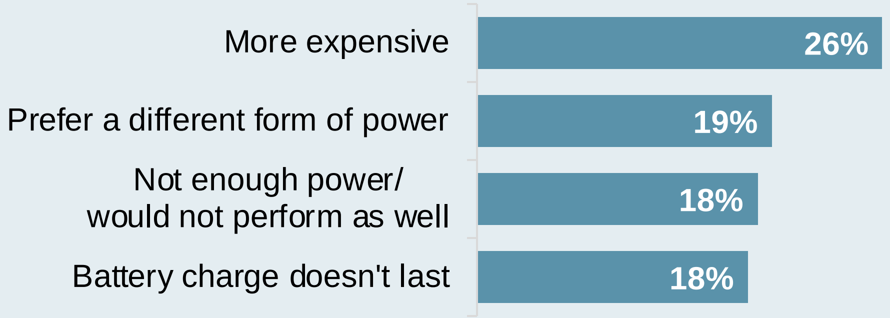
## Budget A Key Factor for Non-Buyers

### Non-Battery Purchasers: Consideration Of Battery OPE And Why (Unaided)

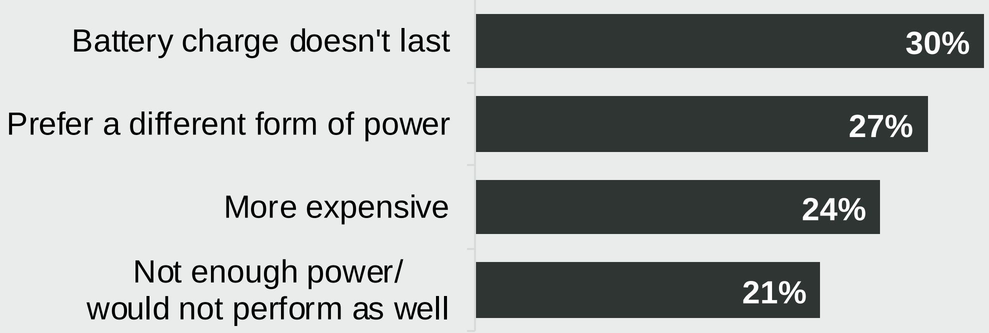



### Considered but NOT Purchased Battery

Heavy DIYers and younger HO had more consideration of battery power



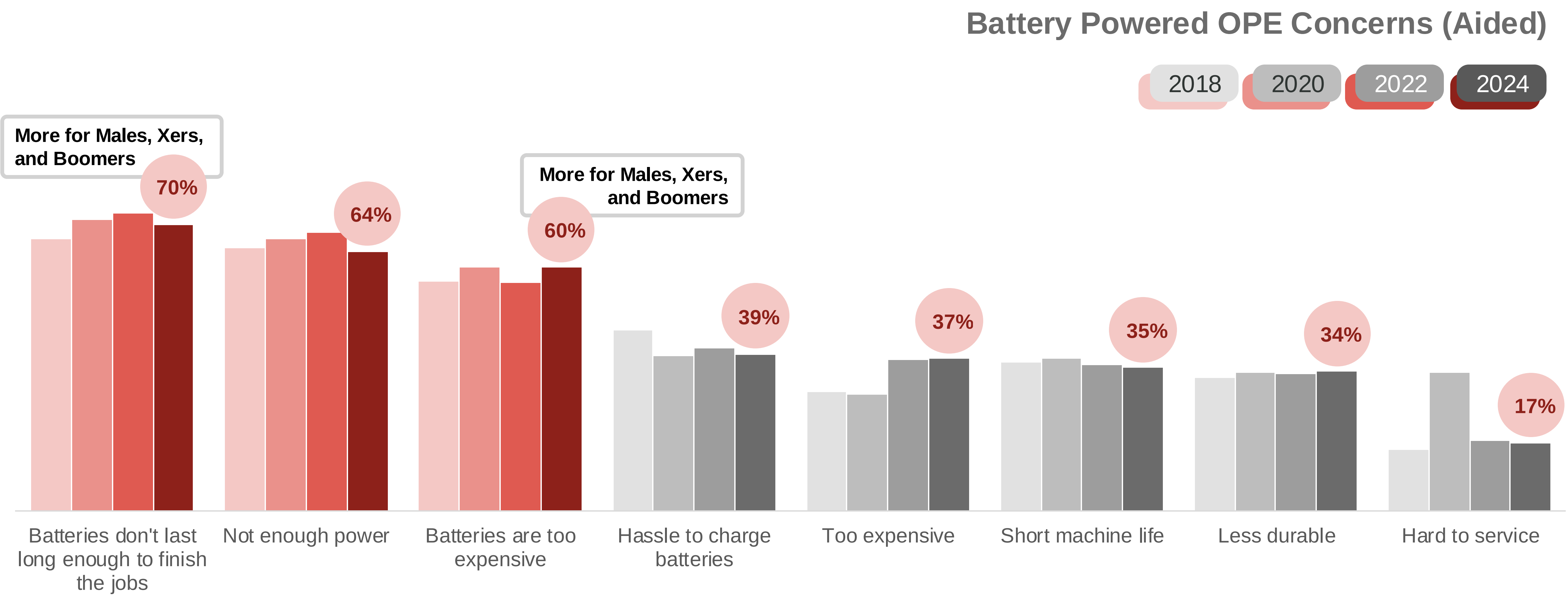

### Did NOT Consider Battery




Includes top responses.

# Top Battery Power Concerns Steady Since 2018

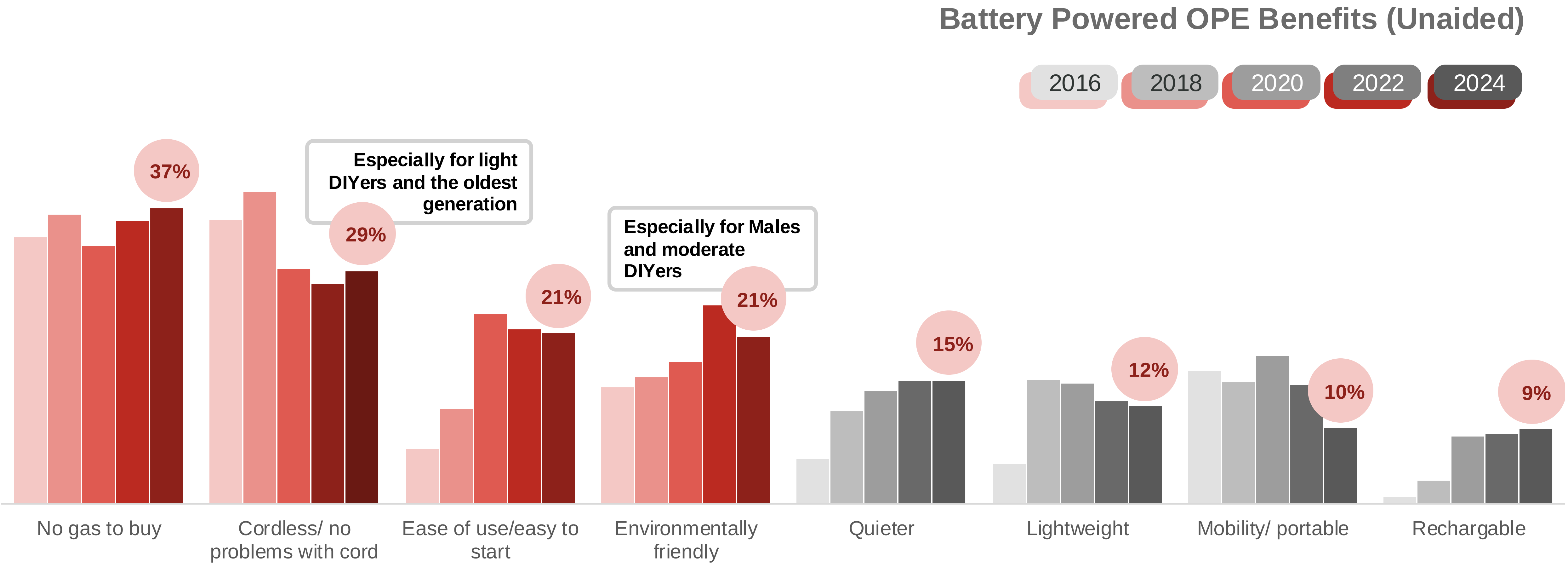
## Cost Concerns Rise in 2022 and 2024 Reflecting Market Conditions




Includes top responses. Totals may exceed 100% due to multiple responses.

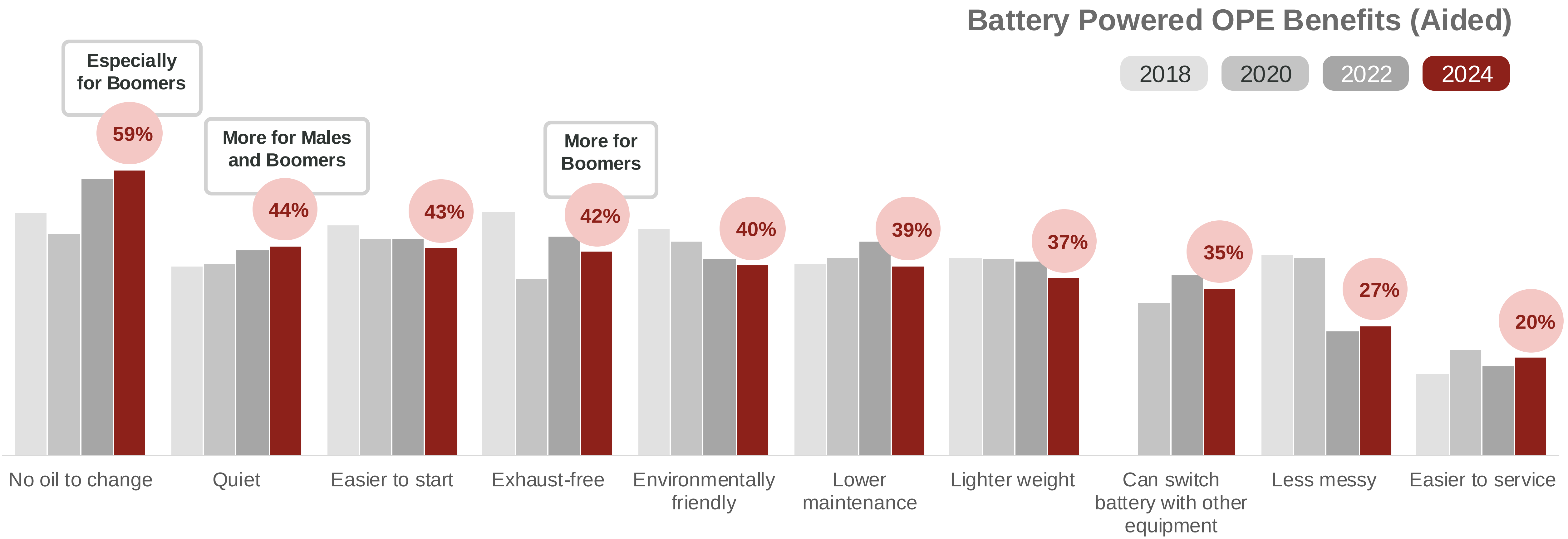
# Cost Savings and No Gas Remain Top Benefits

## Ease and Environmental Factors Grow Over Time




Includes top responses. Totals may exceed 100% due to multiple responses. In 2022, wording of responses altered to remove references to gas.

# Perceived Benefits Hold Steady, with Boomers Seeing More Than Other Generations




Includes top responses. Totals may exceed 100% due to multiple responses. Not asked in 2016. In 2022, wording of responses altered to remove references to gas.

# Attitude Hierarchy Remains Steady

## Battery Knowledge Grows

| Bottom 3 | Middle | Top 3 | | Mean Rating | Difference from 2016 |
|---|---|---|---|---|---|
| 14% | 43% | 43% | **Gas will always be more powerful than battery** | 6.6 | -0.2 |
| 13% | 48% | 39% | Being environmentally friendly is very important me | 6.5 | -0.4 |
| 16% | 49% | 36% | Gas powered outdoor equipment can last a lifetime | 6.3 | +0.1 |
| 14% | 56% | 29% | **Battery powered outdoor equipment is too expensive** | 6.1 | +1.1 |
| 16% | 59% | 26% | I know a lot about battery powered outdoor equipment | 6.0 | +0.6 |
| 20% | 53% | 27% | Battery powered outdoor equipment is just as good as gas powered | 5.7 | +0.3 |
| 25% | 49% | 26% | Gas powered outdoor equipment will be obsolete in 10-20 years | 5.5 | +0.7 |
| 25% | 56% | 19% | Battery powered outdoor equipment can last a lifetime | 5.3 | +0.2 |
| 30% | 55% | 16% | Battery performs better than gas powered outdoor equipment | 4.9 | +0.7 |
| 42% | 49% | 10% | Battery powered outdoor equipment is poor quality | 4.1 | 0.0 |
| 56% | 33% | 11% | **I know nothing about battery powered outdoor equipment** | 3.7 | -0.2 |

Mean Rating & Difference from 2016

1 Completely Disagree — 10 Completely Agree

# Perception Gap Between Gas and Battery Narrows

## Gas Still Seen as Superior and More Affordable

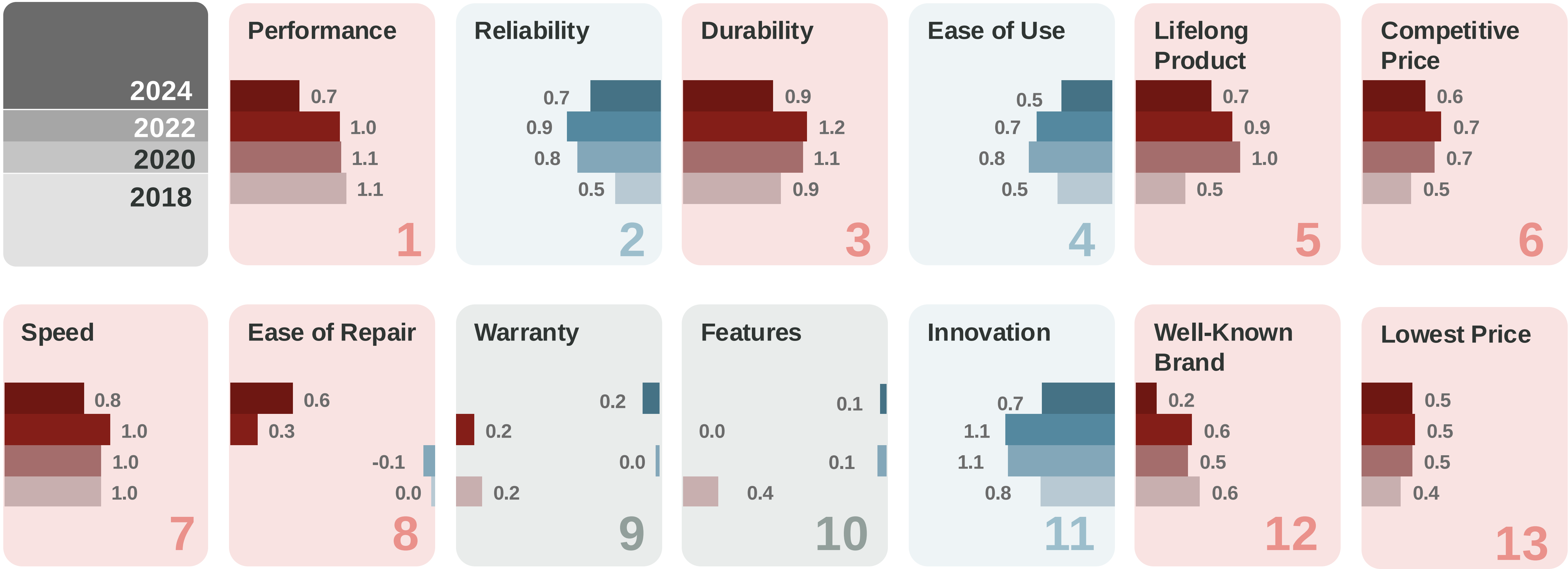
### Gas vs Battery Performance Ratings Comparison

Ordered by Importance

**Perception Gap**

(Difference between the mean performance ratings)

Gas Performs Better | Battery Performs Better

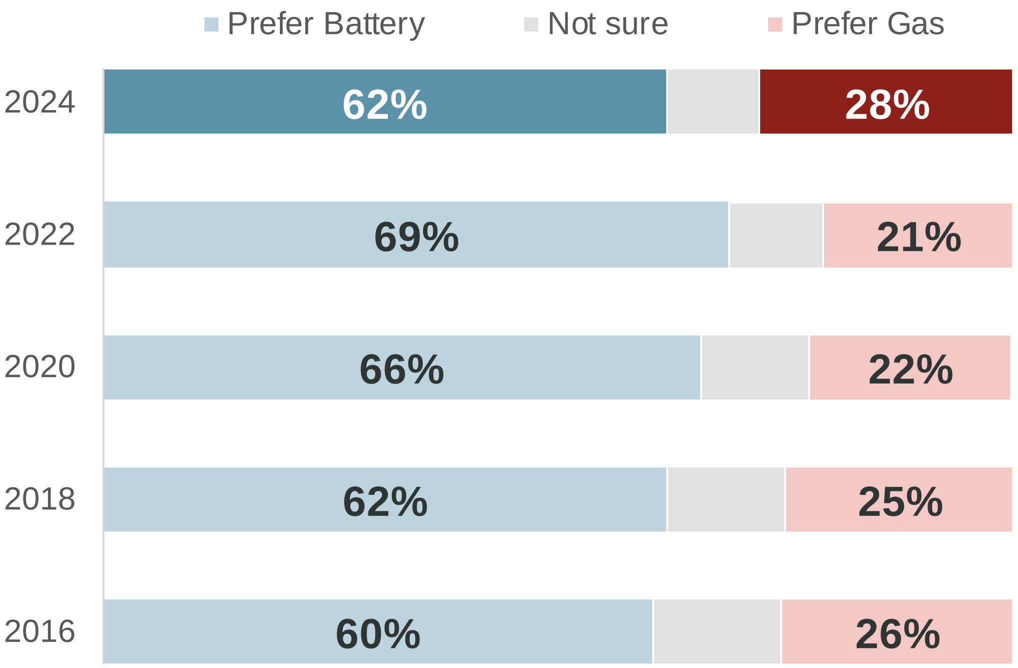



The perception gap is calculated using the difference between the mean performance ratings.
For example, if the average rating for Gas was rated at 9, and Battery was 8.3, there is a 0.7 performance gap favoring Gas.

# Battery Preference Remains 2:1 but Returns to Pre-Pandemic Levels

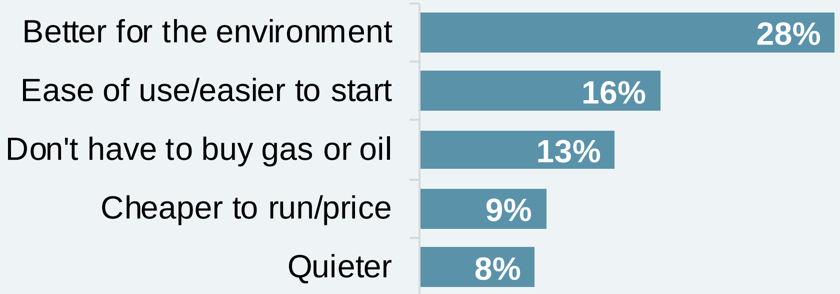
## Some Still Doubt Battery Performance Matches Gas

### Battery Or Gas Preference – All Things Equal

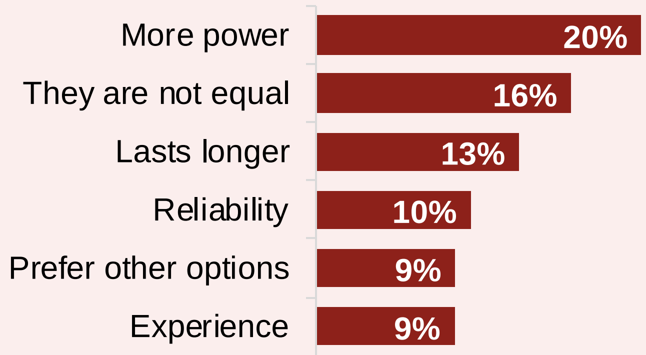



**Younger homeowners are more apt to select gas over battery than older homeowners**

### Why Prefer Battery (Unaided)




### Why Prefer Gas (Unaided)




Includes top responses. Totals may exceed 100% due to multiple responses.

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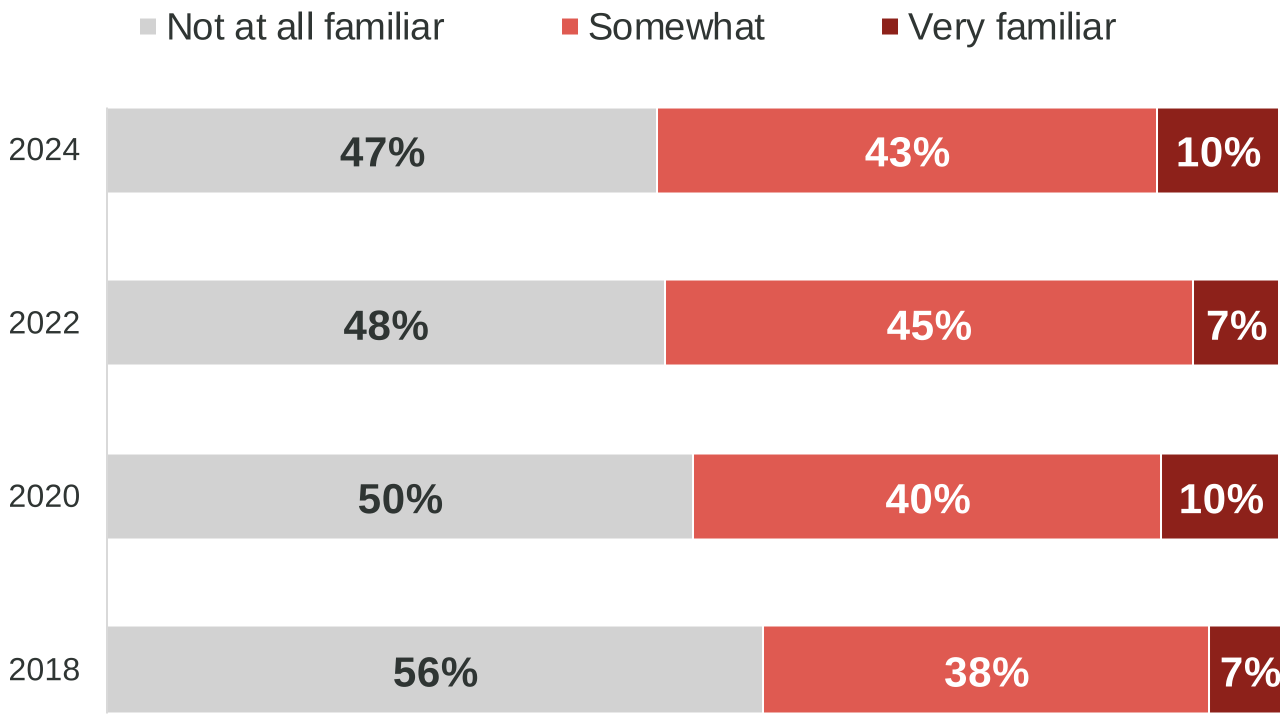
# Ownership and Familiarity with Robotic Mowers

# Familiarity Grows Slowly, Without Significance

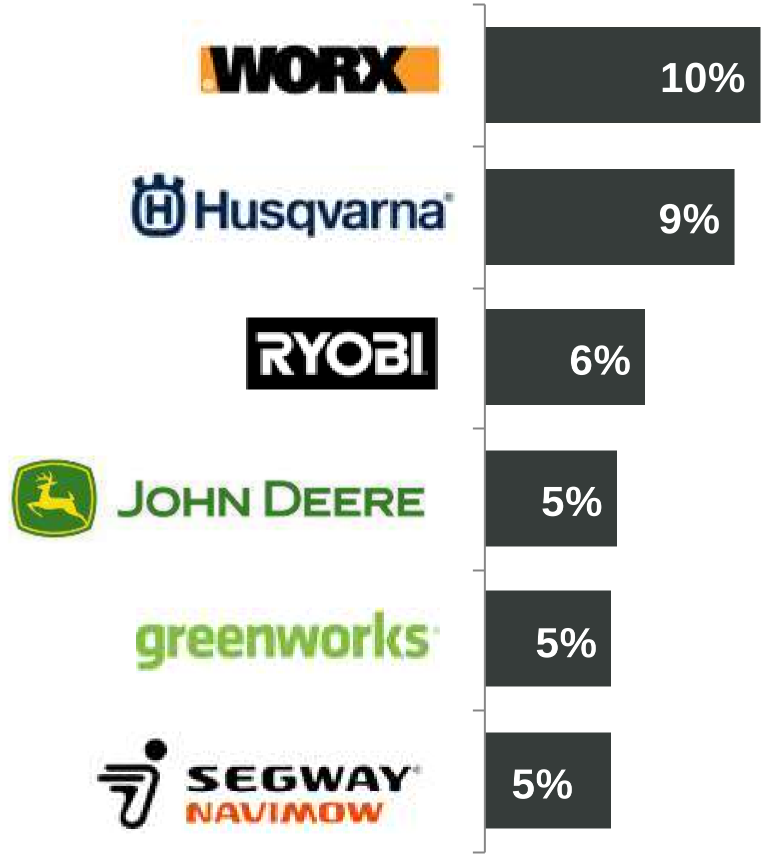
## Robotic Mower Familiarity

Females, light DIYers, older homeowners, and those with smaller yards are not as familiar with robotic mowers.



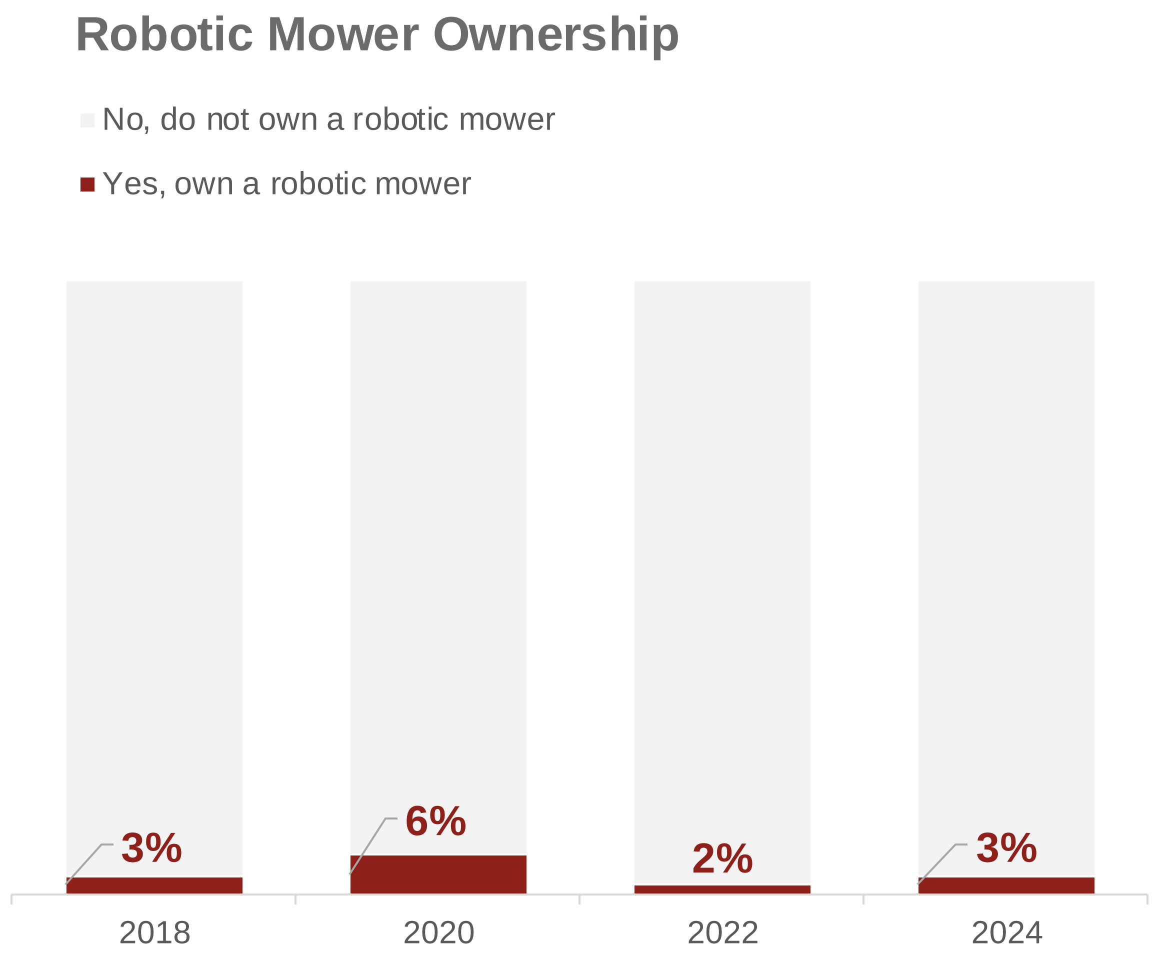

## Brands Of Robotic Mowers Aware Of

(Unaided)




*Question not asked in 2016. Includes top responses. Totals may exceed 100% due to multiple responses.

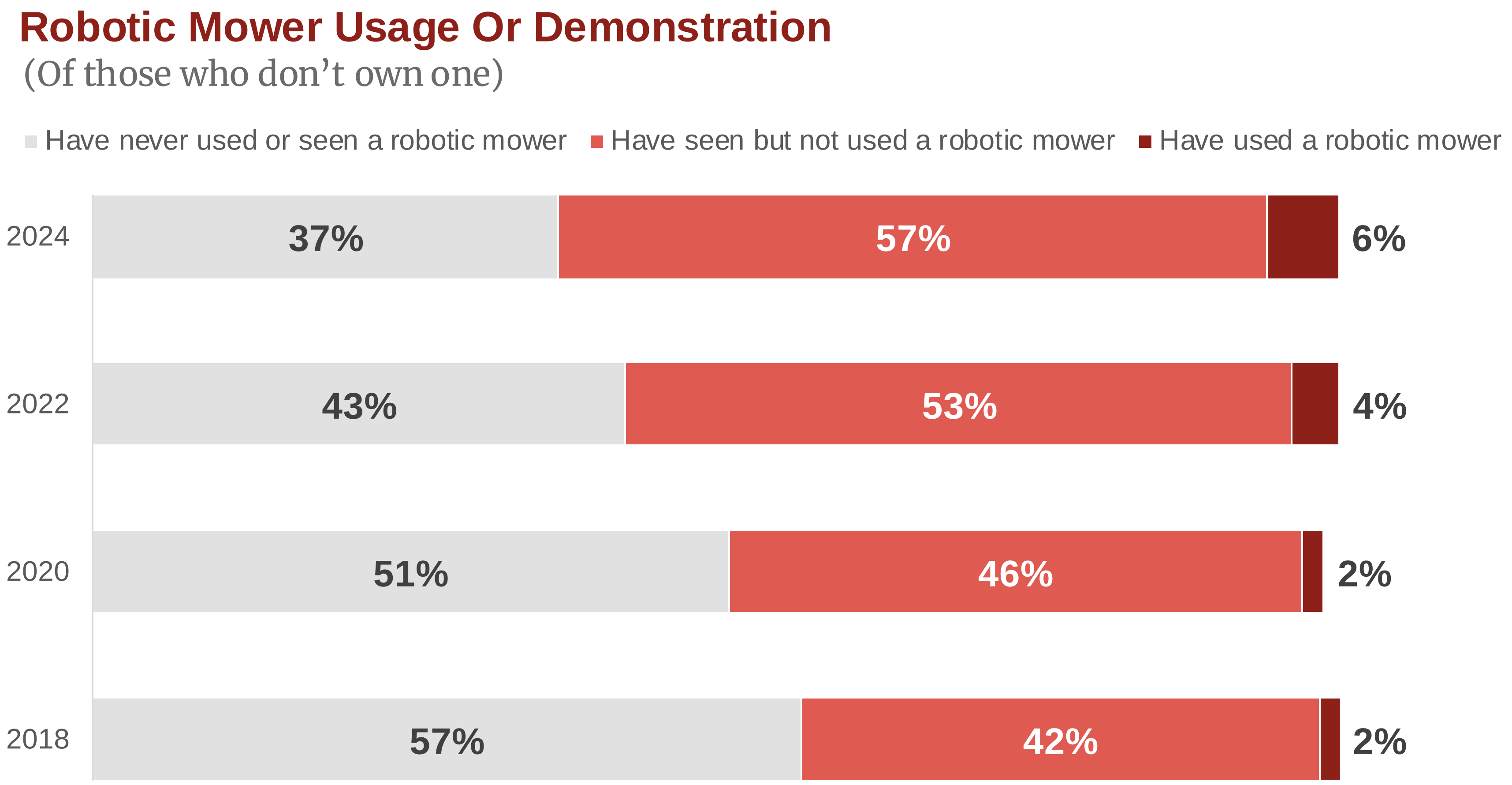
# Robotic Mower Ownership Unchanged Despite Rising Awareness






*Question not asked in 2016.

# Homeowner Exposure to Robotics Grows, But Not Usage or Purchases




Males, moderate and heavy DIYers, and younger homeowners are more likely to have seen but not used a robotic mower

Not asked in 2016.

# So What?

## Uncertainty, Budget Sensitivity

Homeowners may have confidence about their life, but uncertain about the world around them. They are making tradeoffs in discretionary spend. Know your customer's challenges and respond. How are you providing them comfort? Value is key. Offer a breadth of prices and value props to accommodate a range of needs.

## Battery Plateau

May be due to a budget sensitive mind set. Look for increased mobility, home improvement intent to be realized in the years ahead. This along with increasing confidence, improved affordability may result in a return to more premium products.

## Competition is Increasing

It's no longer enough to just show up. You must regain a competitive mind set to steal and maintain share. Know your consumer intimately to curate product and support for their needs. Expect pre-pandemic growth by end of 2025.

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# Thank You!


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