

# 2024 Outdoor Power Equipment Study

Insights on how residential owners shop, where they seek information, and what motivates their parts & accessories purchases.



# Introduction

Our 2024 Outdoor Power Equipment study equips retailers, OEMs, and dealers with data and actionable insights on how consumers research and purchase parts & accessories.

This report contains findings and analysis from a survey that was conducted from August–September 2023. Respondents included 438 US-based consumers, all of whom own outdoor power equipment (defined as lawnmowers, tractors, chainsaws, trimmers, or similar) and have made at least one parts & accessories purchase in the previous 12-month period.

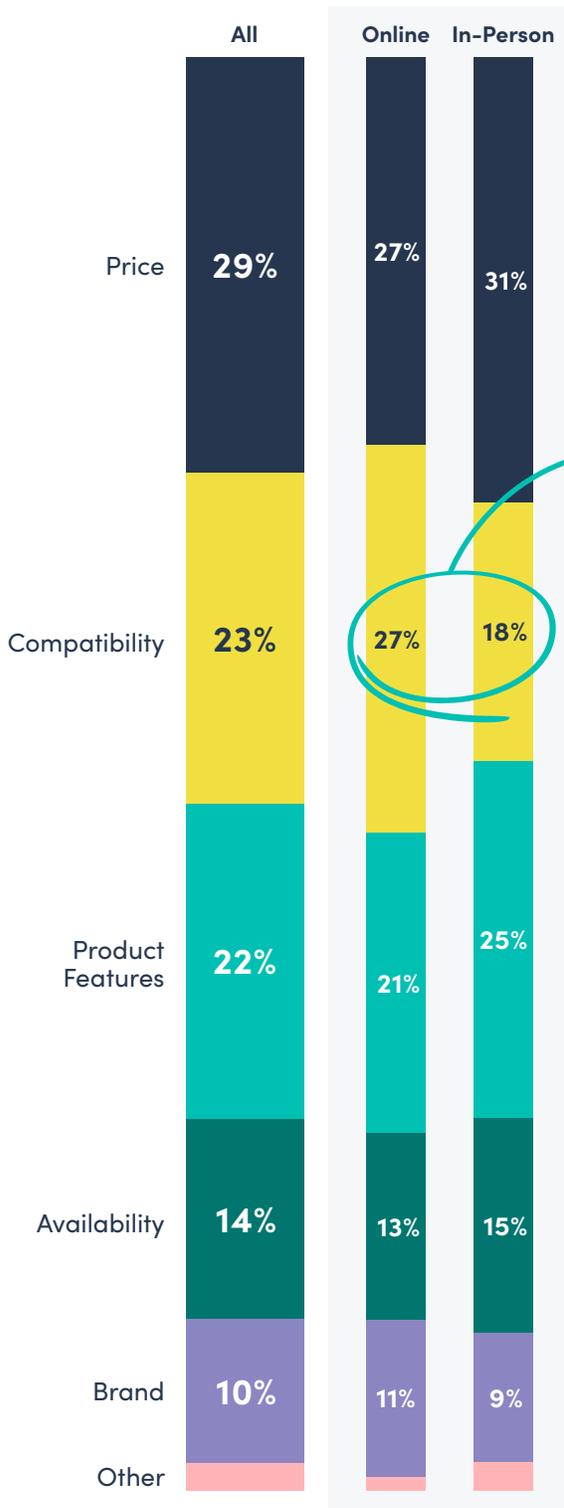
Within this report, we'll examine where owners shop, how much they spend, what motivates them to choose specific channels, and what notable differences exist between groups. In addition, we'll explore the impact these findings have on retailers, and provide short and long-term next steps for responding to owners' motivations and needs.

# Contents

<b>01</b>	<b>MOTIVATIONS</b>	<b>4</b>
<b>02</b>	<b>PURCHASES BY CHANNEL</b>	<b>5-7</b>
<b>03</b>	<b>SPEND BY CHANNEL</b>	<b>8</b>
<b>04</b>	<b>SPOTLIGHT: HIGHER SPENDERS</b>	<b>9</b>
<b>05</b>	<b>INFORMATION SOURCES</b>	<b>10-12</b>
<b>06</b>	<b>OWNER DEMOGRAPHICS</b>	<b>13</b>
<b>07</b>	<b>NEXT STEPS</b>	<b>14-16</b>

# When shopping for parts & accessories, what matters most?

Most important factor when shopping for OPE P&A



Today’s consumer isn’t motivated by a single factor – or even torn between two priorities when shopping for parts and accessories. Instead, our study suggests that owners have three strong motivations that guide their buying decisions: **Price, Compatibility, and Product Features.**

A comparison between Online and In-Person shoppers reveals the same top motivations, with one notable difference. Online shoppers are *significantly more likely* than in-person shoppers (27% vs. 18%) to say that **Compatibility** (“Fitment”) is their top consideration. One potential explanation for this difference is that without the help of a dealer or salesperson, owners need to take more personal responsibility for what fits their equipment.

The implications for retailers and OEMs – especially those have an ecommerce presence – are significant. It’s not enough to compete on price. Consumers demand more, and to succeed, sellers need to include accurate fitment information with P&A and clearly communicate how their products differ from the competition.

### How do leading OEMs compare?

OEM	Sells P&A Online	Fitment Information	P&A Specs/ Key Features
JOHN DEERE	✓	✓	✓
DEWALT	✓	✓	Available for some parts
TORO	✓	✓	Available for some parts
Husqvarna	✓	✓	Available for some parts
HONDA	✗	✓	✗
STIHL	✗	Available for some accessories	Available for some accessories
EGO	✗	✗	✗

# Online, in-store, or both?

Owners are split between in-person shopping and ecommerce, and show a strong desire to blend the two

Among owners who've purchased P&A in the past year,



Owners were asked to select their primary reason for buying P&A either primarily online or in a physical store or dealership. **Nearly 40% of online shoppers say convenience guides their decision to choose ecommerce** and just over 20% shop online because of lower prices. On the other hand, **nearly 40% of in-store shoppers say their top motivation is seeing or inspecting products** and another 37% are motivated by immediate availability.

## WHAT IS YOUR PRIMARY MOTIVATION FOR BUYING P&A ONLINE?

- 38%** Convenience of shopping from home
- 21%** Lower prices
- 13%** Wider selection
- 8%** Easier price comparison

## WHAT IS YOUR PRIMARY MOTIVATION FOR BUYING P&A AT A PHYSICAL LOCATION?

- 38%** See / inspect products
- 37%** Immediate availability
- 12%** Avoiding shipping costs
- 7%** Personalized assistance



## Owners want online shopping tools that enhance the in-person experience

While owners are relatively split in their preference to shop primarily online or at a physical store or dealership, there is a clear desire to blend the two. Nearly **7 in 10 owners are interested in checking dealer inventory online** and close to half are interested in buying products online for in-store pickup.

Among owners who mainly buy P&A in person, the preference for checking product availability online is significantly higher – **78% say it's important to see if products are in-stock at a retailer when shopping online.**

68%

of owners want to see if OPE products are in-stock at a local store or dealer when shopping online

45%

of owners want to buy OPE products online and pick them up at a local store or dealer

## Omnichannel consumers seek strong connections with brands they buy from

It's not surprising that owners who are interested in buying parts and accessories online for in-store pickup also have a strong affinity for online tools that allow them to see a retailer or dealer's inventory (90%).

What is surprising, however, is how much this group of owners also values online tools and programs that deepen their connection with OPE brands and retailers.

Specifically, owners who show a strong interest in "buy online, pick up in store" programs are **over two-and-a-half times more likely than other owners to express interest in online loyalty programs. This group is also twice as likely as other owners to value My Garage/ My Account tools that allow them to save and recall previous purchases.**

Among owners who are interested in buying P&A online for pick up in-store:

53%

say that getting loyalty points or rewards for their purchase is extremely or very important

*\*compared to 19% of other owners*



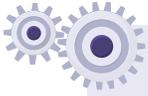
54%

say that My Account tools that save purchase history are extremely or very important

*\*compared to 27% of other owners*



# What role does the OEM play in owners' buying journey?



78%

of owners are likely to buy replacement or maintenance parts directly from a manufacturer's website

*\*Of these, 32% say they're extremely likely*



77%

of owners are likely to buy accessories directly from a manufacturer's website

*\*Of these, 29% say they're extremely likely*



56%

of owners are likely to buy anything for their equipment through a manufacturer's mobile app

*\*Of these, 20% say they're extremely likely*

Fewer than 10% of owners make most of their parts & accessories purchases on a manufacturer's website. Despite this, a majority express interest in shopping with manufacturers online. Specifically, our study shows that **over 75% of owners say they're likely to buy replacement parts, maintenance parts, or accessories direct from a manufacturer's website**, and over half of owners would be interested in buying anything for their equipment using a manufacturer's mobile app.

To better understand this seemingly paradoxical finding, we took a closer look at owners who say they're extremely likely to buy parts or accessories from a manufacturer's website, but don't make most of their purchases there today. When compared with owners who have little or no interest in shopping with manufacturers online, this group is significantly more likely to use online parts diagrams. In addition, this group is more than twice as likely to: 1) shop primarily at a dealership or hardware store and 2) turn to their dealer for advice on what to buy.

## What separates owners who are extremely likely to buy parts or accessories on manufacturer's websites from those who aren't?

84%

have used a parts diagram in the past year to search for OPE parts and accessories

*\*compared with 67% of owners who have limited or no interest in shopping with OEMs online*

2x

more likely to make most of their P&A purchases at local dealerships or hardware stores

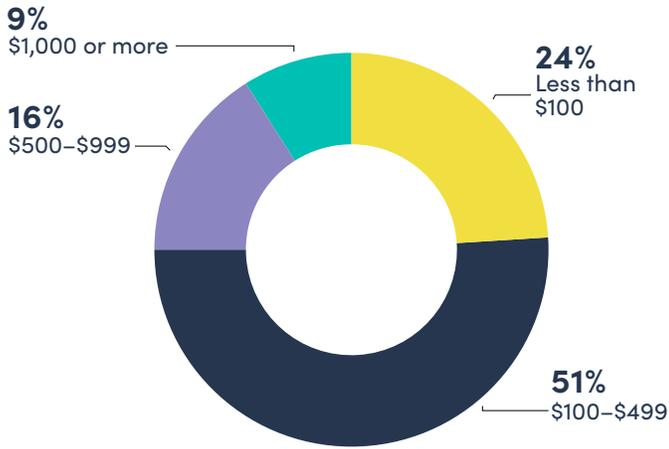
*\*26% vs. 11% of owners who have limited or no interest in shopping with OEMs online*

38%

say that their local dealer is their #1 source of advice on what to buy for their equipment

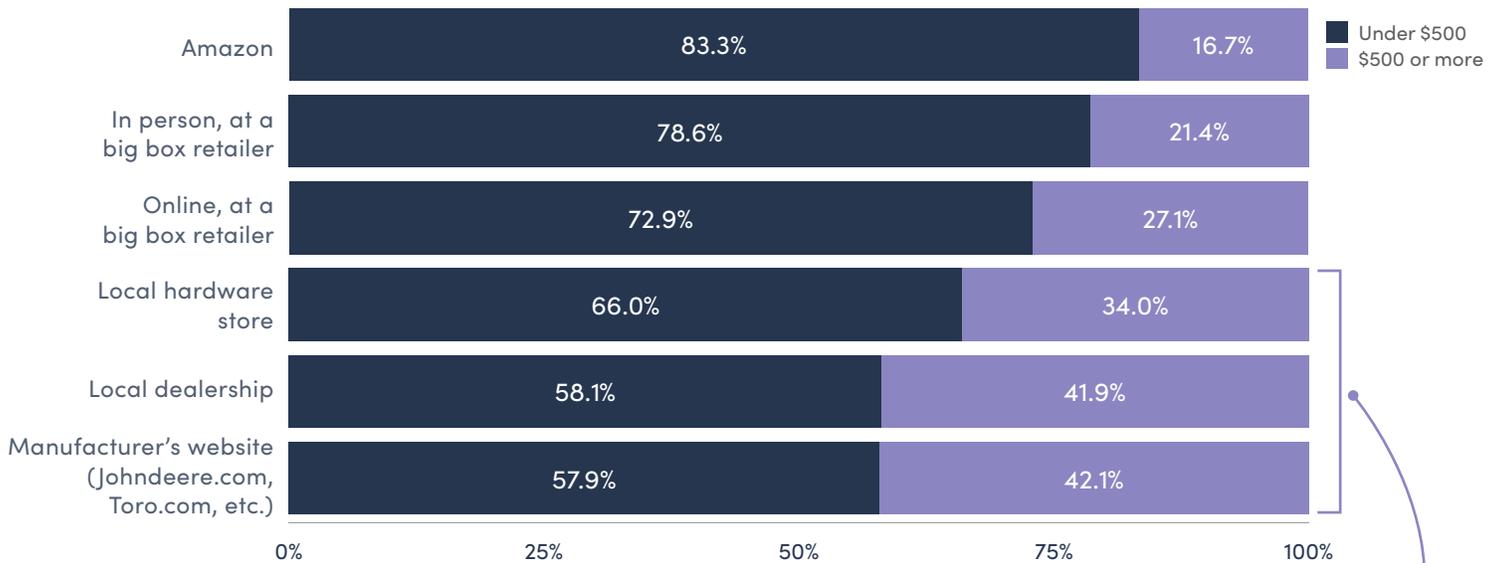
*\*compared with 18% of owners who have limited or no interest in shopping with OEMs online*

# How much do owners spend on parts & accessories?



About **half of all owners surveyed said they spent between \$100 and \$499 on OPE parts and accessories in the past year** and an additional 24% spent less than that (under \$100).

Not surprisingly, shopping primarily on Amazon is correlated with a significantly lower annual spend on P&A. Eighty-three percent (83%) of owners who shopped for OPE P&A mainly on Amazon spent under \$500 on parts and accessories last year, compared with just over 70% of owners who did the majority of their shopping on any other channel.



Owners who do most of their shopping at local hardware stores, dealerships, or on manufacturers' websites are almost **twice as likely to spend \$500 or more annually on P&A**

\*39% vs. 20%

# A SPOTLIGHT ON HIGHER SPENDERS

While most OPE owners (75%) report spending less than \$500 annually on parts and accessories, **25%** invest more in their equipment, and are also significantly more likely to want and use digital tools that simplify their buying process.

## Among owners who spent \$500 or more on parts & accessories in the past year:



73%

are extremely or very likely to use an OPE manufacturer's mobile app when shopping for parts & accessories

*\*compared to 51% of low spenders*



54%

say that My Garage / My Account features that save purchase history are extremely or very important

*\*compared to 34% of low spenders*



49%

are extremely or very likely to shop for parts & accessories using a subscription or auto-replenishment service

*\*compared to 22% of low spenders*

OPE owners who invest more in parts and accessories don't just stand out because of how much they spend – they also tend to be younger than other owners.

**Over half of higher spenders (54%) are under the age of 45** (compared with 20% of low spenders) and about **one-third are between the ages of 35 and 44.**

Younger age as a whole is also correlated with a high interest in digital tools. Among *all owners under 45*:

65%

are extremely or very likely to use an OPE manufacturer's mobile app when shopping for parts & accessories

56%

say that My Garage / My Account features that save purchase history are extremely or very important

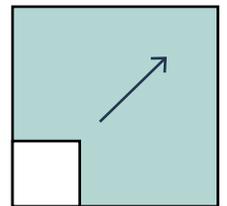
50%

are extremely or very likely to shop for parts & accessories using a subscription or auto-replenishment service

## Big spenders are also big on social

High spenders are **3x more likely to follow OPE brands on social media**

*\*45% of high spenders vs. 14% of low spenders*



And among this socially engaged group,

96%

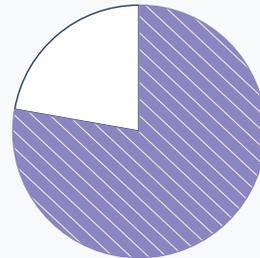
have made an OPE purchase based on something they saw on social.

*\*compared to 73% of low spenders*

# Parts diagrams are a valuable tool for owners

For both DIYers and anyone who wants to understand the exact part they need to repair or replace on their equipment, parts diagrams are a critical tool. Additionally, since parts diagrams typically provide focused results for a very specific need (as opposed to a general keyword search), they're more likely to result in a successful search – and ultimately, a successful purchase.

Our study confirmed that the majority of owners who've used parts diagrams say that they are very important to their buying process. What's more, **over half of this group of owners (51%) say that diagrams are their #1 or #2 way to search for OPE parts and accessories.**



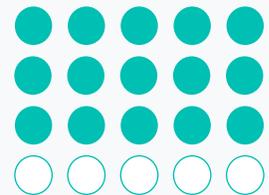
78%

of OPE owners report using a parts diagram in the past year

Among owners who've used a parts diagram,

75%

say it was **very important** in their buying process (8 out of 10 or higher)



## OEMs and Parts Diagrams

	Online Diagrams	Shoppable Diagrams
JOHN DEERE	✓	✓
DEWALT	✓	✓
TORO	✓	✓
Husqvarna	✓	✓ <small>*many products not available for purchase</small>
HONDA	✓	✗ <small>*can add products to list &amp; send to dealer</small>
EGO	✗	✗
STIHL	✗	✗

## Top reasons why owners use parts diagrams:

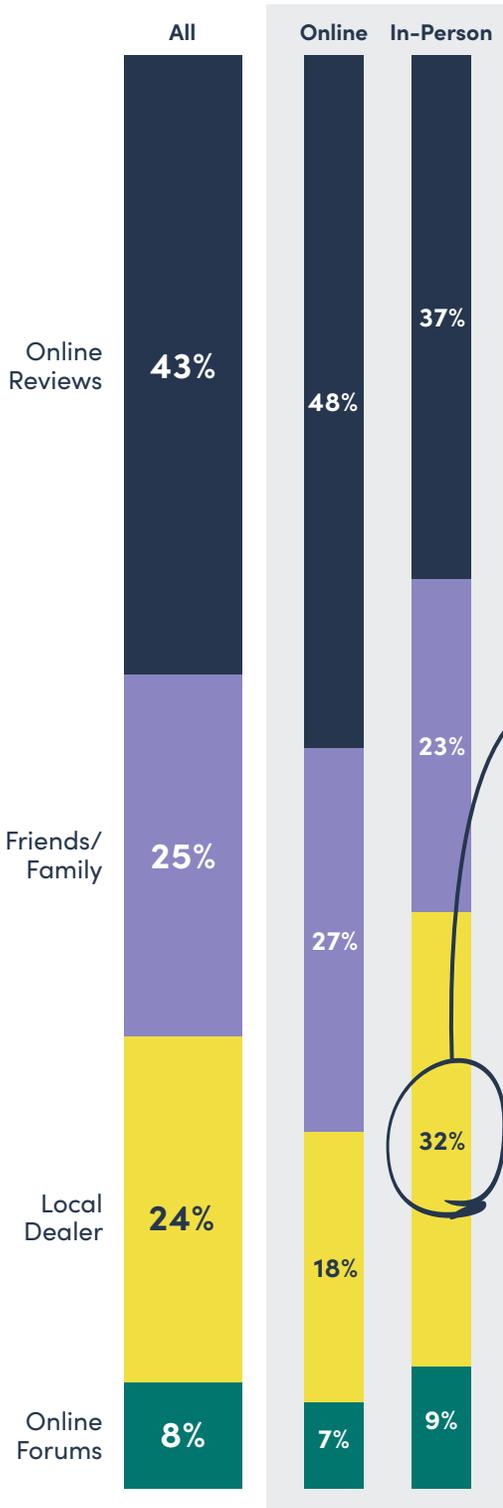
71% To make sure I was buying the right part

57% To find a specific part number

54% To understand what part I needed

# Where do owners go for advice on what to buy?

Top Source for P&A Recommendations



When asked where they seek recommendations on what to buy for their equipment, 70% of owners say that online reviews are their #1 or #2 source for advice. Additionally, over **40% of owners report that reviews are where they go first for P&A advice.**

About one-quarter of owners say that friends or family are their top source for recommendations, and an additional 24% say their local dealer is their top source of advice.

The story, however, is different when comparing owners who shop primarily online with those who shop primarily in-person. Not surprisingly, dealers are a more important source of advice for owners who shop mainly in person, **with nearly one-third saying their local dealer is their first source for P&A recommendations.**

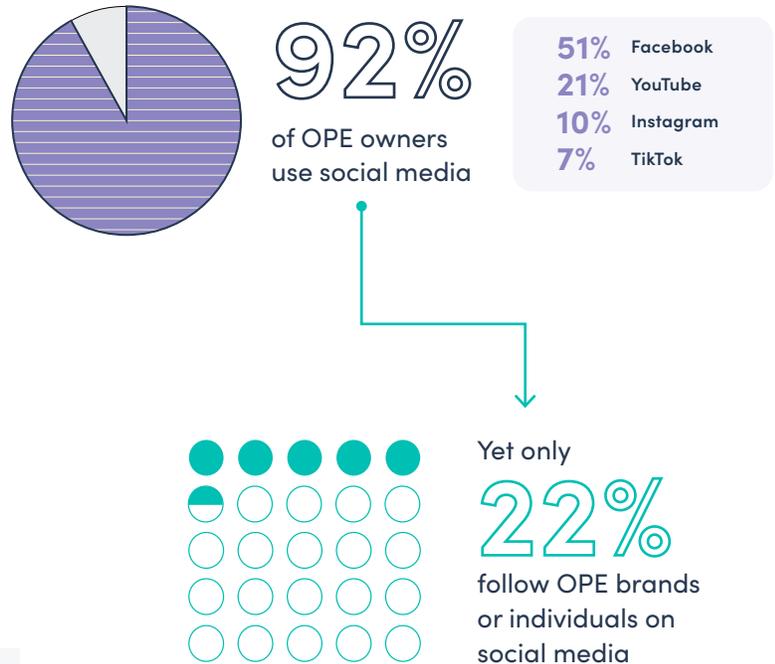
### RECOMMENDATION SOURCES & OWNER AGE

When compared with owners over 45, **owners under 45 are less likely to say that online reviews are their #1 source for advice and significantly more likely to rely on friends/family (32% vs. 23%) and online forums (12% vs. 5%) as their top source for product recommendations.**

Additionally, fewer than 20% of owners under 45 say their dealer is their top source of advice (compared with 27% of owners over 45). It's also worth noting, however, that the majority of owners who buy P&A primarily in dealerships are over the age of 45 (60%).

# Social media is a source of practical content that motivates purchases

While almost all owners surveyed use social media (92%), fewer than one in four (22%) follow OPE brands or influencers. Owners who *do* engage with OPE content on social media prefer practical information, with equipment reviews and installation tutorials topping their list of interests. Owners who follow OPE content on social are also heavily influenced by what they consume. A significant majority (85%) report that they've purchased either outdoor power equipment or something for that equipment based on something they've seen on social.



## Among owners who follow OPE social media accounts:

**MOST ARE SEEKING PRACTICAL, HANDS-ON CONTENT**

**77%** Equipment reviews

**74%** Installation tutorials

**59%** Parts or accessories reviews

**85%**

have made an OPE purchase based on something they saw on social

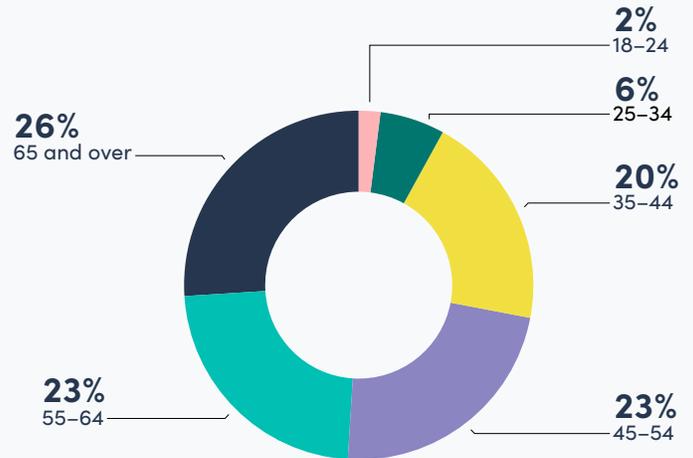


## OEM Social Presence

	Facebook Followers	YouTube Followers
JOHN DEERE	5.2M	303K
STIHL	3.7M	97K
DEWALT	2.6M	78K
Husqvarna	1.3M	44K
EGO	303K	11K
HONDA	155K	605K* <small>*entire Honda brand</small>
TORO	103K	34K

# Who did we talk to?

This report is based on the responses of 438 Outdoor Power Equipment (OPE) owners who purchased parts & accessories (P&A) for their equipment in the past 12 months. This study was conducted online in August 2023 among US-based adults over the age of 18. Participants were compensated for their time.

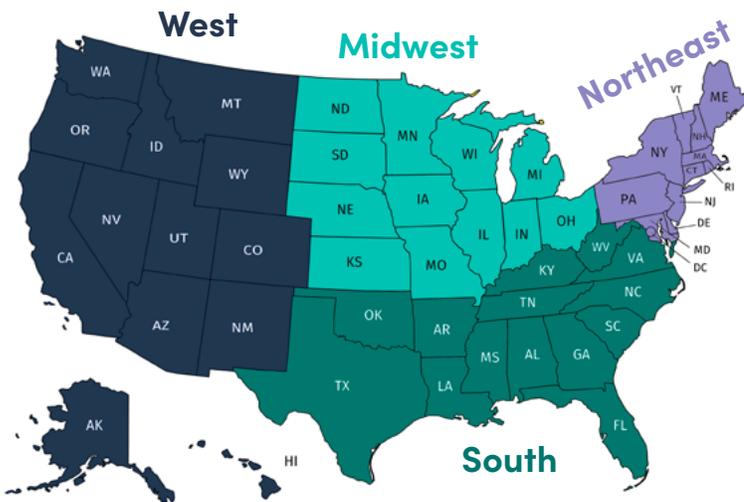


**Half** (49%) of respondents are over the age of 55 and nearly three-quarters (72%) are over the age of 45



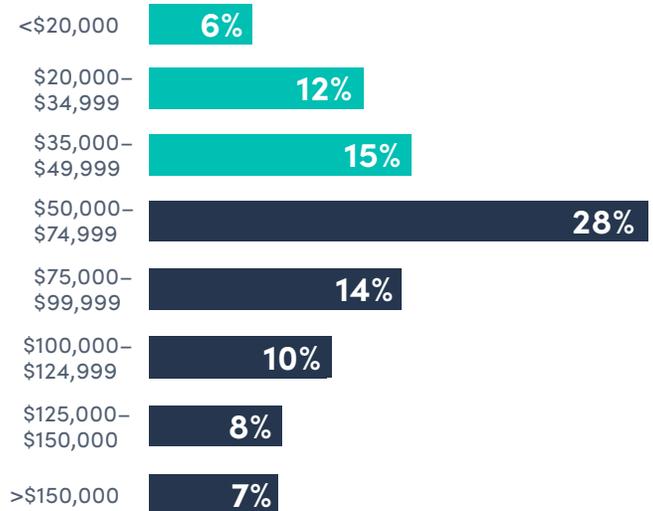
34%

of OPE owners recruited for this study purchased parts or accessories in the past year



**39%** South  
**23%** Midwest  
**22%** Northeast  
**16%** West

## Household Income



**Two-thirds** (67%) respondents have a household income of \$50,000 or higher

# TAKE THE NEXT STEP

In this section, we outline steps that OEMs and their dealer networks can take to act on the insights we have uncovered about where and how OPE owners shop for parts & accessories. Our recommendations are focused primarily on building and optimizing digital programs, tools, and resources to address changing customer motivations and needs.

## 1. Unify in-person and online experiences with a true omnichannel strategy.

While today's OPE owners are divided in their preference for online or traditional retail (**56%** vs. **44%**), they don't want to simply trade dealerships for digital. Instead, they have a strong interest in tools that connect online and in-person retail, which include viewing in-store inventory online (**68%**) and buying products online for in-store pick-up (**45%**).

To build an effective omnichannel strategy, OEMs and retailers should invest in experiences that allow consumers to move freely between channels while also taking advantage of the unique strengths of each.

While the application of these findings will depend on your organization's goals, here are a few ways to break down silos and promote a more seamless connection between traditional and digital retail:



Real-time dealer or distributor inventory on ecommerce channels



Ship-to-store / ship-to-dealership programs



Dealer-enabled ecommerce ("shop local" programs) on OEM channels



A "virtual parts counter" that brings personalized fitment guidance to digital

# TAKE THE NEXT STEP

## 2. Capitalize on the value of parts diagrams to streamline the path from search to purchase.

Nearly 80% of owners who've purchased parts or accessories in the past year have used a parts diagram, and a significant majority (75%) say this tool was very important to their purchase process.

How can retailers and OEMs make the most of this critical shopping tool? We recommend both improving the experience these diagrams provide, as well as enhancing diagram searches with tools that offer more personalized, relevant content. Here's where to start:



Integrate "shoppable" diagrams into digital channels (and optimize for mobile)



Make diagrams a prominent parts search method



Use diagrams to promote other frequently purchased parts or accessories



Enhance diagram results pages with related content (installation videos, reviews)



Consider cross-promoting diagrams on social media and marketing channels

# TAKE THE NEXT STEP

## 3. Deliver and sustain ongoing value with account-based ordering and loyalty programs.

When shopping online, OPE owners express interest in My Account or My Garage features that simplify their ordering process, and programs that reward them for their loyalty. This is especially true of owners who spend over \$500 on P&A annually (**54%**), as well as owners who are under the age of 45 (**56%**).

To act on this insight, it's not only important to build account creation into your ecommerce strategy — it's also critical to ensure that your customers are rewarded for this effort. Here are a few areas to consider:



Create “auto-replenishment” tools that allow account holders to easily repurchase consumables (oil, blades, etc.)



Once account holders populate their “garage” with equipment owned, filter parts & accessories search results by that equipment and provide recommendations based on frequently purchased items and order history



Consider OEM-only discounts, rebates, rewards, or loyalty programs that incentivize customers to shop with the manufacturer.

# About Herohub

Herohub is a digital product and professional services firm that creates custom solutions and strategies for OEMs and brands with dealer networks. Clients across a number of industries partner with Herohub to scale their ecommerce businesses, standardize their product data, and improve customer experience.

## INDUSTRY EXPERTISE



Powersports



Outdoor Power  
Equipment



Automotive



Manufacturing

## PRIMARY SERVICES

Audience research studies to map user behavior, identify opportunities and inform business and product strategy.

Digital product design, development, and support for clients using the Herohub product system and clients who want to build or evolve other product systems.

Strategic leadership, executive consulting, and collaborative roadmap development.