Dyson Vacuum Cleaner:
Shifting from domestic to international marketing with the famous bagless vacuum cleaner

International Marketing – Assignment 2
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Abstract

After dominating the local UK market and successfully developing a new market in the US, Dyson, the ambitious vacuum cleaners manufacturer still competes in the mature global market of vacuum cleaners. Adopting a differentiation strategy since its inception, the company aims to take its brand to the next level and to expand into new grounds. This comes in a critical time after a declining market share in its high end vacuum cleaners segment, and withdrawing its innovative and very expensive washing machine from markets. The paper attempts to select the most potential global markets for Dyson to put more marketing investments. The paper suggests those markets to be mostly Scandinavian. The paper also aims to shed the light on the mass distribution strategy adopted in the US market by Dyson. Finally the paper studies the opportunity for Dyson to repeat the huge success of its vacuum cleaner to enter new product category of washing machines.

Keywords: Vacuum Cleaners, Dyson, International Marketing, Upright Vacuum, Household Vacuums, Home Appliances, Consumer Goods, Branding, New Market Development, Pricing Strategies, Washing Machines, Advertising, Distribution
Dyson Vacuum Cleaner

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Introduction

The global vacuum cleaners market have had a steady growth rate of two percent from the year 2000 to 2005, and reached a total value of more than $13 billion in the year 2009. The majority of sales come from Western Europe and North America where Dyson competed successfully in the high end upright vacuum cleaners segment. However, Asia Pacific markets have been also growing rapidly where cities such as Shanghai, Beijing and Tokyo became among the world’s top 10 cities in vacuum cleaners sales in the year 2009. Most attractive target export markets include; the US, Hong Kong, France, UK, and Germany. This doesn’t seem strange when looking at global consumption data. The European market holds more than 44 percent of total world consumption followed by North America (35 percent). Asia, Oceana, Latin America, the Middle East and Africa emerging markets promise strong growth rate in consumption for domestic vacuum cleaners and floor polishers. Except for the UK, Dyson has a low market share in most of the developed countries. The top manufacturing countries of vacuum cleaners led by China also include; Germany, Mexico, South Korea, United States, and Malaysia. Dyson’s home land shared only 1.46 percent (ranked 11) of the total world’s domestic vacuum cleaners and floor polishers exports in the year 2006. Although Chinese consumers are considered to be new at using vacuum cleaners, the country holds more than 40 percent of the total world exports. This suggests a strong competition by new cheaper brands made by China, Mexico and Malaysia introduced to both developed and developing markets.
In addition to the bagless vacuums trend that Dyson invented and many competitors started to follow, vacuum cleaners consumer shows an increasing demand for lower-priced products. An environmental concern of using recycled plastic and lower energy consumption is also becoming a growing trend. Some competitors such as Groupe SEB added a noise reduction technology and lighter weights in their products. Another interesting innovation trend is the introduction of the first robotic vacuum cleaner in the American homes. A race towards achieving this has been on among Dyson, Maytag, Hoover and Electrolux’s Eureka.

Many Chinese manufacturers have penetrated developed markets through strong relationship with large retailers and establishing joint venture agreements in neighboring countries such as India. Electrolux, the leading appliances manufacturer also selected joint venture manufacturing in China. Domestic joint venture with Asian manufacturers was the option adopted by Whirlpool and Matsushita Electric Industrial Company to manufacture vacuum cleaners in the US. On the other hand, SEB for example depended on acquisition in their entry to the German and the Russian markets. Whirlpool also acquired Maytag.

On the other hand, the washing machines global market is still dominated primarily by European manufacturers exporting more than 70 percent of global exports in the year 2006. Italy alone holds about 30 percent of total exports, followed by Germany and South Korea. In terms of consumption, Europe also comes first with 73 percent of total global imports, followed by Asia, North America and the Middle East. Top players include; Whirlpool, Maytag, LG, Bosch and Zanussi. Price, energy efficiency and sustainability are increasingly important trends in the global market.
Analysis

After introducing an overview on the vacuum cleaners and washing machines global markets, the paper analyses briefly Dyson’s current marketing strategies comparing to its competitors’, as well as its overseas manufacturing experience in order to spot areas for improvement. The paper then goes further into detailed analysis and segmentation for potential new global markets for expanding its selling base and achieving more growth and globalization. The paper finally evaluates Dyson’s distribution strategy in the US.

Marketing Strategies

The company achieved a huge success filling a gap in consumer needs with its bagless innovation targeting high-end consumers. Dyson depended on recommendations and word of mouth over traditional advertising in selling its products. However, they started adopting informationative ads as well. The trend is clearly continued by looking at Dyson.com website. Rational appeal, sleek design in imagery and contents, and highlighting technical information aim to build the brand personality around superior quality and product innovation. Realizing the importance of advertising and facing high competition, Dyson moved on with increasing advertising budget. In the year 2002, Dyson was shopping for another advertising agency to replace Miles Calcraft Briginshaw Duffy. In 2007, Dyson signed a $20 million pan-European advertising contract with Leagas Delaney Inc. to market its products in all Europe except for the UK. Most if not all of Dyson’s competitors have tried to establish a unique brand personality across years. GE for example tried to position its vacuums in advertising as the housewife’s friend aiming for simplicity and emotional position. While Miele's personality is more of a status symbol with its stylish sport design. UK vendors used commonly personal door-to-door selling
for vacuum cleaners, a trend that showed declining effectiveness due to lack of control over salesman practice.²³

**International Market Segmentation**

In order to determine most potential markets for Dyson allocate marketing investments in developing or penetrating, the analysis will select the most attractive global markets in terms of vacuum cleaners sales volume and growth rate. The analysis will study each of these markets according to the international marketing segmentation framework suggested by Hollensen, S. (2007).²⁴ The segmentation excludes the United Kingdom, the United States, Japan and Australia, as Dyson is successfully marketing its products in these countries. As seen in (Exhibit 1), the analysis measures market attractiveness and Dyson’s competitive position for specific countries such as; Germany, Italy, Sweden, France, Spain, Netherlands, Belgium, Denmark, Norway, Finland, Canada, Russia and Eastern Europe, Singapore and New Zealand, Mexico, China, and the Arabian Gulf Arab countries. Countries of Eastern Europe, Scandinavian, and Arabian Gulf countries are grouped in a single score because of their homogeneity in terms of market conditions and competitive position in relation to Dyson. The matrix in Figure 1 below is between market attractiveness and Dyson’s competitive strength, scoring each dimension on a scale from one to five. “A Markets” illustrate Dyson’s primary markets with the most potential strategic growth. These primary markets include; Sweden, Netherlands, Canada, Eastern Europe, Arabian Gulf and Russia. Secondary countries and markets, “B Markets” where Dyson also has opportunities for selective strategies and joint venture include; Germany, Spain, Belgium, Denmark, Norway and Finland. “C Markets” of China, Mexico and Italy are considered to be risky countries for Dyson’s business to invest or grow.²⁵
**International Markets Subsegments**

After determining the most potential countries and markets for growth, the analysis develops subsegments in those markets based on specific product characteristics for vacuum cleaners. The markets are segmented into three categories: A Markets, B Markets, and C Markets. Each segment is further divided into specific countries or regions.

- **A Markets** (High Country/Market Attractiveness & Competitive Strength): Netherland, Sweden, Canada, Singapore/New Zealand, Russia/Eastern Europe, Germany, France, Belgium, Finland, Denmark, Norway, Arabian Gulf.
- **B Markets** (Moderate Country/Market Attractiveness & Competitive Strength): Spain, Mexico, China, Italy, Singapore/New Zealand.
- **C Markets** (Low Country/Market Attractiveness & Competitive Strength): Mexico, China, Italy, Belgium, Finland, Denmark, Norway, Arabian Gulf.

cleaners and washing machines. In terms of developing subsegments from the primary markets, they can be grouped into four key segments:

1. 21-50 years old female household of Netherlands, Sweden, France, Belgium, Denmark, Norway, and Finland of household income in middle and high segments.

2. 21-50 years old female household in Canada, Singapore, and New Zealand of household income of the highest 10 percent.

3. 21-50 years old female households in Eastern Europe of household income of the highest 10 percent.

4. 21-50 years old female household in Arabian Gulf nationals of household income household income in middle and high segments.

Taking Sweden as an example of the Scandinavian homogenous household consumer, the buyer is empowered by a substantial bargaining power with high purchasing power, independence and sophistication. The market has near perfect competition with variety of vendors and brands.\(^{26}\) In the year 2003, the household spending in Canada have risen by around ten percent.\(^{27}\) In the year 2006, there was also an increase in household spending due to the availability of more affordable homes.\(^{28}\) Canada, New Zealand and Singapore being mostly immigrant societies, consumers can be considered to be price-cautious and prefer lower-priced practical products especially for new immigrants. In a study published by Gallup in the year 2010, 43 percent of Gulf Cooperation Council (GCC) population is classified as thriving. GCC nationals enjoy high per capita and high buying power.\(^{29}\) The region perceives Western brands as high quality and a state of esteem and self-actualization. The emerging economy of Eastern Europe witnessed a substantial three percent increase in disposable household income between
the years 2006 to 2007, while started to deteriorate rapidly after the global financial crises in the year 2008.30

**Dyson Distribution in the United States**

Dyson penetrated the US market with 350 percent more sales from 2003 to 2005. The company’s US distribution adopted primarily a mass distribution strategy being available in more than 1500 locations.31 Dyson adopted a selective distribution strategy in some cases such as in Vacuum-Direct.com, an online specialty retailer that offers only Dyson and Miele vacuums.32 The company distributed its products in the US through majority department stores33 and mass retailers such as Electric City, Best Buy,34 Wal-Mart, Sears, and Home Depot. As most of its developed markets, Dyson provided its shoppers in the US with a sleek online shopping experience and free shipping at Dyson.com website. Dyson also have partnered in distribution with the vast number of online US specialty retailers such as ABC Vacuum Warehouse, Vacuum-Direct.com, Best Vacuum, and Banksvac.com. General non-specialty online retailers such as Overstock.com, and The Conran Shop are also among Dyson’s distribution partners. Other high and medium brands also share similar distribution network with Dyson.35

**Washing Machines Category**

Dyson’s competition in this category is much more diversified.36 While Dyson has achieved a good success in its comfort zone of vacuum cleaners, the company still has a substantial gap in terms of size and diversification to plan the competition in other categories. The Contrarotator washing machine is still a question mark in Dyson’s portfolio. Customers expected simply a twice better washing in return for the twice more price. Product innovation in less cloth damaged and high capacity simply were less than customers’ expectations. Compliant
with Dyson’s good old differentiation strategy, The Contrarotator had a sleek futuristic design and represented Dyson’s brand image successfully.\textsuperscript{37} In the year 2001, there was news about manufacturing the new washing machine in Australia.\textsuperscript{38}

**Conclusions**

Dyson has been able to succeed because of its product innovation and premium quality differentiation strategy. Targeting the high-end buyers and positioning its brand around premium quality and high price was an enabler for success. With more price-cautious global customers, Dyson wasn’t able to communicate and educate its customers about the value behind its innovating premium products as a justification for their high prices. Declining market share because of competition becomes expected. Customers switched to lower priced alternatives when they didn’t see the value delivered by the extra money spent. The company’s dependency on word of mouth was not leveraged or integrated enough in its global advertising campaigns.

In terms of potential growth, the company still has a huge room for growth in many high-end markets in Scandinavian countries, Canada, Australia and other global emerging markets. Dyson should focus its marketing spend in penetrating more of its developed high-end markets of Netherlands and Sweden. The company should leverage that Scandinavian base to develop new homogenous markets in Norway, Belgium, Finland and Denmark. Scandinavian area should be the top global markets of focus for Dyson’s high-end brands with the most potential for appealing to high purchasing power and quality-focused consumers. The secondary marketing focus should be towards high-end segments of Canada, Australia, New Zealand, Hong Kong, Japan and Singapore. The third focus should be for developing new markets among the high-end
segment of Eastern Europe, the Middle East, Spain, Germany and France, where high competition and fragmented needs are key challenges. Despite the fact that the Chinese market represents a huge opportunity for growth to many vacuum manufacturers, it is not the best option for Dyson’s premium product at that stage of growth. Dyson will be faced by aggressive competition by cheaper and more mature manufacturing in this part of the world with lack of compensating high-end and quality-focused customers.

In terms of its mix, Dyson did not capitalize enough on its product innovation advantage in addressing all global consumer trends of power saving, noise reduction and water consumption. Dyson’s advertising strategies still didn’t reach its maturity level for a global player. Changing agencies and adopting country and region-level focused campaigns should not help building Dyson’s brand into a global one. Premium pricing was the correct strategy, but the difference was too high between similar competitor products.

In terms of distribution strategies in the US, Dyson’s huge success in this market is a tangible evidence of its mass distribution strategy adopted there. However, Dyson can still take the advantage of being close to all buyers while keeping its premium brand image preserved (See Recommendations). Dyson also did not establish strong partnerships with specialty wholesalers in the US as it did with general wholesalers. The move of its manufacturing to Malaysia in order to drop cost was a correct decision. However, this adds up a greater risk in controlling product quality and depending on a single foreign country to place all manufacturing activities.

Dyson can repeat its huge success in vacuum cleaners in the washing machine category and other categories as well. The factor for success is targeting the high-end segment of
consumers while maintaining a strong marketing communication strategy to educate its customers about the value of its products.

**Recommendations**

Dyson should continue to capitalize on its winning advantages of premium quality and product innovation. Innovation should be more about customer needs rather than just providing impressive features. Consumers at the end qualify a vacuum cleaner quality by simply how good it cleans. Same concept for washing machines and similar categories, better cleaning should be Dyson’s R&D focus. Dyson should revise its pricing strategy in order to stay selling at a premium, but within a reasonable difference between competitors for its customers to still favor in trade of quality.

Dyson should rethink its marketing strategy from a global perspective. While a reasonable degree of localization is critical for success, a standardized global positioning for Dyson as the top technology, premium product, and British-made quality should be emphasized. Rather than a premium UK product, Dyson did not yet establish a clear brand personality as its competitors did. A brand image around the future, the technology of tomorrow, the smart appliances and the world-class cleanliness should guide its global campaigns. As a premium product, Dyson should focus on emotional appeal more into its advertising campaigns. Besides having the right rational amount about the benefits of its features, emotional appeal about technology, lifetime products and future should be more prominent.
For the coming five years, 60% of the marketing budget should be allocated to Western Europe, especially Scandinavian countries where Dyson has the most potential for success. Replacement buying should be encouraged to build a strong awareness. Communicating the UK and US success to Scandinavian consumers should also leverage the new market development. In France and Germany where high competition and large population exist, greater degree of localization should be adopted. Twenty percent of marketing budget should be allocated to more penetration of Dyson’s existing strong markets such as the UK, US, Japan and Australia. While the remaining 20 percent should be allocated to secondary new markets of Eastern Europe, the Middle East, Hong Kong, and New Zealand.

Repeating the success through wholesalers in the US is possible in new markets. Suburban areas should be covered by strong distribution channels. Dedicated local websites should be built with a compelling user experience. Dyson can take advantage of its existing strong relationship with global online distributors to succeed in European and global markets. Global online retailers such as e-Bay and Amazon should be a primary focus for Dyson to establish strong relationship with. Business segments should also be targeted through housekeeping companies and hospitality businesses.

While mass distribution proved success in the US, it is argued that this strategy shouldn’t be adopted for premium products. Dyson can combine both benefits of mass and selective distribution by forming agreements with wholesalers and retailers to display Dyson’s products in separate and distinguished kiosks or sections inside their stores with strong place branding and accompanying branding activities and promotions. Same goes for online retailers where Dyson
can have its special web pages with unique branding, user experience and features that set it apart from competitors. Dyson should also target department stores, household multiples and grocery multiples to cope with a growing global trend for consumers’ preferences in shopping styles.

For Dyson’s new washing machine, the company should aim to work on two parallel paths to repeat the success of vacuum cleaners. First; the price should be reduced to be at 130 percent of closest competitor. This should help customers to easily tradeoff its benefits for its cost. In order to do that, the company needs to move washing machines production to lower cost global places in Eastern Europe and the Far East. R&D investment should also aim to minimize production costs. Marketing the new washing machines should capitalize on the huge success for Dyson’s vacuums as a reason to encourage consumers to trust the new product offered.

To maintain premium product quality whilst keeping production costs down, Dyson needs to invest in its overseas manufacturing facilities. Personnel selection and careful training should be formed by a strong quality control by Dyson’s experienced managers.
## Exhibit 1 – Vacuum Cleaners International Markets Segmentation

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### CASE ANALYSIS - DYSON VACUUM CLEANER

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End Notes

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