



## **Electrolux Global Vacuuming Survey 2013 Report**

### **Introduction and methodology**

The Electrolux Global Vacuuming Survey 2013 is an online survey among 28,000 consumers from 23 countries on their vacuum cleaning habits and preferences. Overall, it shows both many differences and many similarities when it comes to vacuum cleaning among consumers in different countries, different age and gender. While it shows the “what”, it does not seek to explain the reasons behind the similarities and differences.

The survey was independently conducted by survey companies Cint\* and Netigate\*\* during April 9 and June 7 2013 with nationally representative samples from 23 countries based on gender and age. Before fieldwork started the survey was quality controlled for each market. The following countries were part of the survey: Sweden, Denmark, Finland, Norway, UK, Germany, France, Poland, Portugal, Turkey, Russia, USA, Canada, Mexico, Colombia, Argentina, Chile, Brazil, China, Japan, Korea, Thailand and Australia.

The fieldwork of the survey was conducted through panels located in OpinionHUB, an international platform and marketplace for online panels. The panels in OpinionHUB are recruited through telephone interviews, web recruitment, face2face interviews, via newsletters and other member lists. The majority of the panels are owned by market research agencies and media companies. All panels follow the recommendations of ESOMAR. Panels located in the platform are certified according to ISO 26362.

Netigate provided the survey tool and the online panels were provided by Cint (for more information see end of the report).

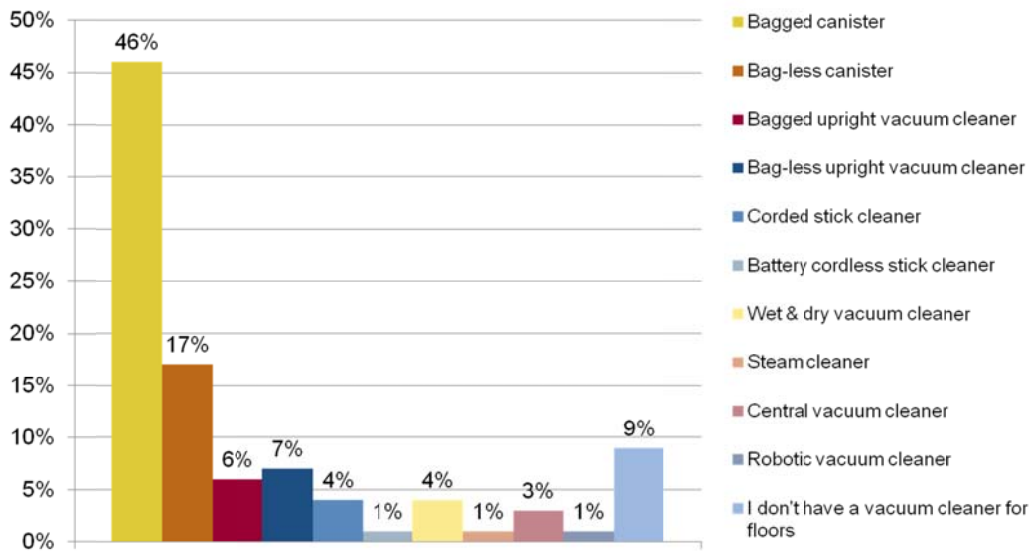
For definitions of different types of vacuum cleaners see end of the report.

This report covers the global result with specific differences between countries, gender and age. For more result details: [paul.palmstedt@electrolux.com](mailto:paul.palmstedt@electrolux.com)

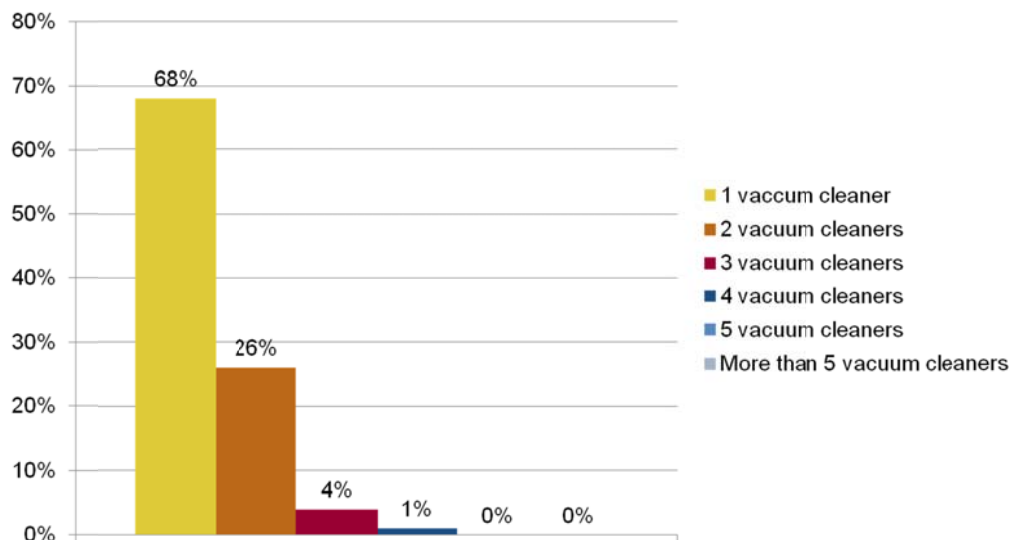
## Survey results

### 1. Vacuum cleaner ownership

- 46% uses a bagged canister as their primary vacuum cleaner and 17% a bag-less canister
- 1% uses a robotic vacuum cleaner as their primary vacuum cleaner
- 68% has one vacuum cleaner in the household. 26% has two cleaners. Very few (5%) has more than three vacuum cleaners in the household.
- 51% acquired their main vacuum cleaner during or after year 2010
- Only 11% owns a main vacuum cleaner which is ten years old or more
- Almost no-one uses a main vacuum cleaner that is older than 30 years



**Graph 1: Which of the following best describes your primary vacuum cleaner?**



**Graph 2: How many vacuum cleaners do you have in your household?**

#### **Country** differences in ownership

- Bagged canisters are most popular in the Nordic countries with the following shares: Sweden (84%), Denmark (74%) and Norway (73%). Among the non-European countries, Chile stands out with a share of 63%.
- Bagless canisters as a share of total ownership are most popular in Australia (39% say that a bagless canister is the primary vacuum cleaner), followed by France (36%) and Korea (32%).
- Upright vacuum cleaners (bagged and bagless) are most common in English speaking countries: US (57%), UK (46%), Canada (34%) and Australia (20%).
- Very few (1% globally) owns a robotic vacuum cleaner. Highest ownership of robotic cleaners in this survey has Turkey (4%), Denmark and France (3%).
- In many countries, it is still relatively common not to have a vacuum cleaner: Colombia (36%), Brazil (26%), Mexico (25%), Thailand (24%), Argentina (23%) and China (19%).

#### **Gender** differences in ownership

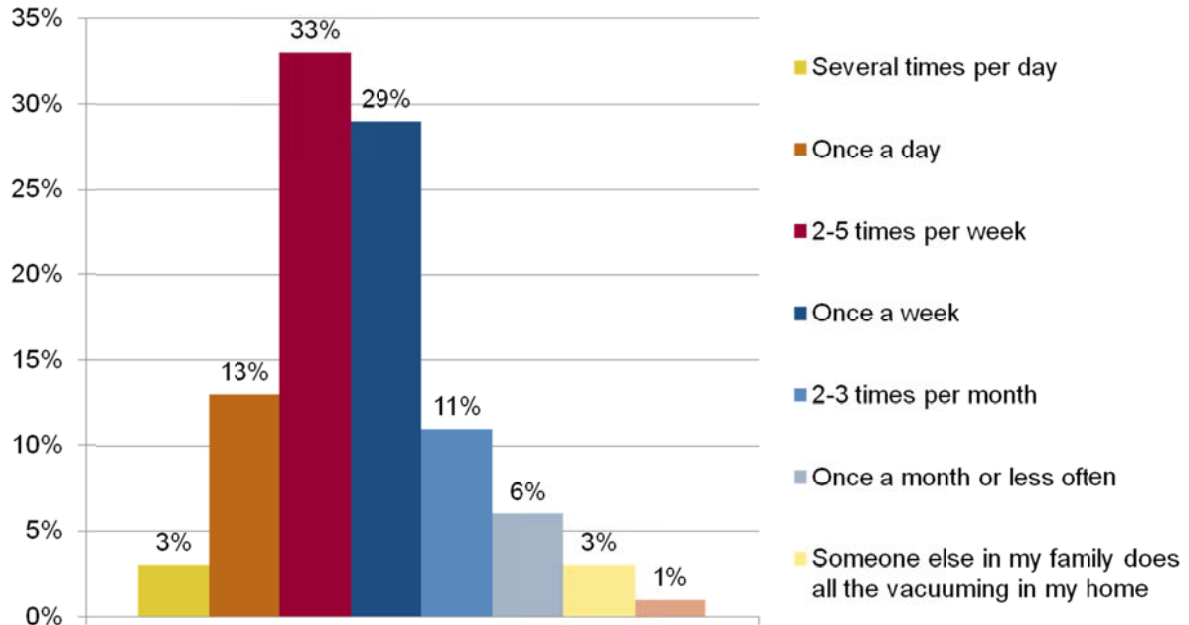
- There are very small differences between the genders in terms of which type of vacuum cleaner they own. It is not the case that there are more women globally who say they own bagless vacuum cleaners or that more men have robotic cleaners.

#### **Age** differences in ownership

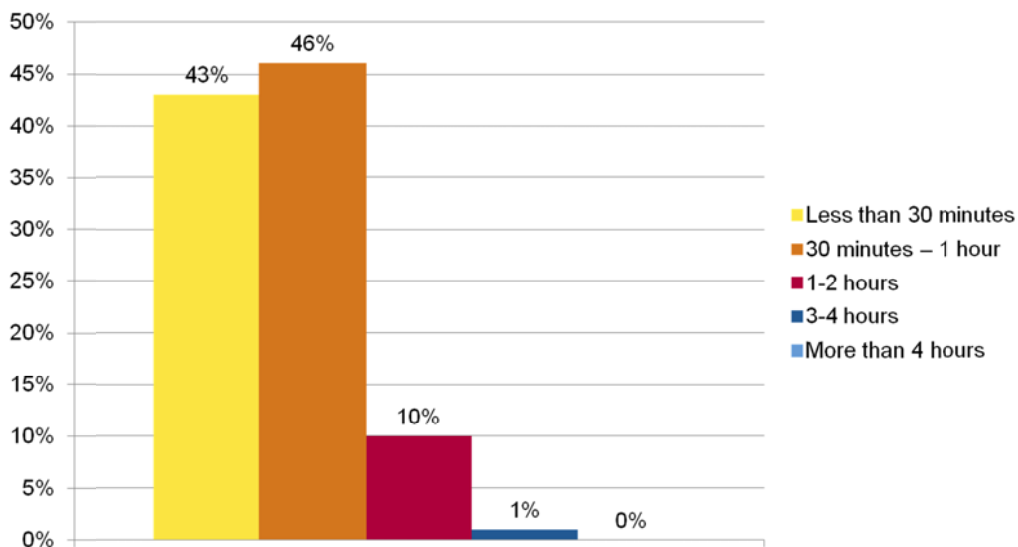
- There are few or small differences in ownership between the different age groups. Younger people own bagged canisters to a lesser extent than older groups (44% of 18-30 years old vs. 50% of 61-70 years old). 5% in the 18-30 group own a corded stick cleaner compared to 2% in the 61-70 age group. 13% of the 18-30 age group doesn't own a vacuum cleaner for floors, compared to the global average of 9%.

## 2. Vacuuming frequency

- 33% vacuums 2-5 times per week and 13% once a day. 3% vacuums several times per day
- 6% vacuums once a month or less often
- 89% vacuums for less than one hour (of which 43% less than 30 minutes)
- Close to no one vacuums longer than 4 hours



**Graph 3: How often do you in most cases vacuum at home?**



**Graph 4: When you vacuum, how long does it usually take?**

### **Country** differences in frequency

- The most frequent vacuum cleaning people are the Koreans. 11% of Koreans vacuum several times per day and another 29% vacuum once a day. The Koreans are followed by the Turks, with 13% vacuuming several times per day and 21% once a day. In third place come the Chileans, with 31% vacuuming once a day (all these countries have a high urban percentage respondents in the survey, where dust could be perceived as a bigger problem than in rural areas).
- At the other end, 17% of the Chinese and 16% of the Thais vacuum once a month compared to the global average of 6% vacuuming once a month or less often.
- The quick-cleaners live in Korea and Japan. 68% in both countries spend less than 30 minutes when vacuuming, which is substantially more than the global average of 43% (note that apartment size in these two countries are generally smaller than average)
- The two Portuguese speaking countries Brazil and Portugal are leading globally when it comes to time spent when cleaning. 22% and 20% respectively spend 1-2 hours when vacuum cleaning, compared to the global average 10% . An additional 3% in each country spend between 3-4 hours, which is also world leading.

### **Gender** differences in frequency

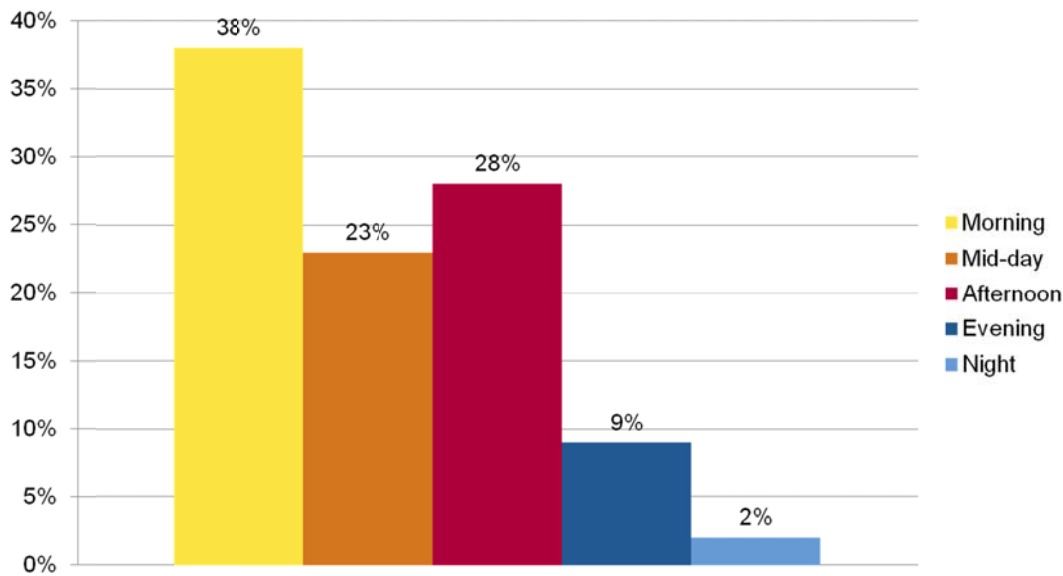
- More women than men say that they vacuum once a day (14% vs 12%) and 2-5 times per week (35% vs. 31%), but the difference is not huge. More men than women say that they vacuum only 2-3 times per month (13% vs. 10%) and once a month or less (6% vs. 5%), but again the difference on a global level is not dramatic.

### **Age** differences in frequency

- Overall, the younger you are the more often you vacuum. 16% of the 18-30 years old vacuum at least **once a day**, compared to 11% of the 61-70 years old. 33% of the 51-60 and 61-70 years old vacuum **once a week**, compared to 26% of the 31-40 age group.
- Consequently, 48% of the 18-30 years old vacuum less than 30 minutes, compared to 41% of the +51 years old.

### **3. Timing of vacuum cleaning**

- Vacuuming in the morning is most common (38%), followed by afternoon (28%). Only 9% vacuum in the evening
- Most people (64%) vacuum equally often between the seasons. Only 13% vacuum less often in the summer.
- A big majority (69%) do a quick vac in-between the regular deep cleaning



**Graph 5: What time of the day do you in most cases vacuum?**

**Country** differences in timing

- Colombians are morning cleaners. 82% say that they mostly vacuum in the morning. Overall do people in Latin America prefer to vacuum in the morning: Chile 67%, Brazil 65%, Mexico 63% and Argentina 59% (compared to global average 38%). Also the Japanese prefer the morning for vacuuming, with 62% saying that they mostly vacuum in the morning.
- While only 9% globally prefer to vacuum in the evening, almost 17% of the Thais are evening cleaners, followed by 16% of Koreans and 15% of the Finns.
- Many Chinese are late vacuumers. 16% of the Chinese respondents say they vacuum during the night (global average 2%) and another 11% in the evening (global average 9%). The Chinese thereby stand out from all other countries when it comes to vacuuming during the night.
- 23% of Swedes, 21% of Danes and 18% of Norwegians vacuum less often during the summer season. During spring and autumn, 99% globally vacuum as usual. The only country that stands out is Thailand, where 23% of Thais vacuum less often during the autumn.
- A quick vac in-between the regular deep cleaning is more common in Latin America than elsewhere. 88% in Colombia and Chile, 87% in Mexico, 80% in Argentina and 78% in Brazil agree, compared to 69% on average globally. Least prone to do a quick-vac in-between the regular deep cleaning are the Polish (52%) followed by Australians and Chinese (55%).

**Gender** differences in timing

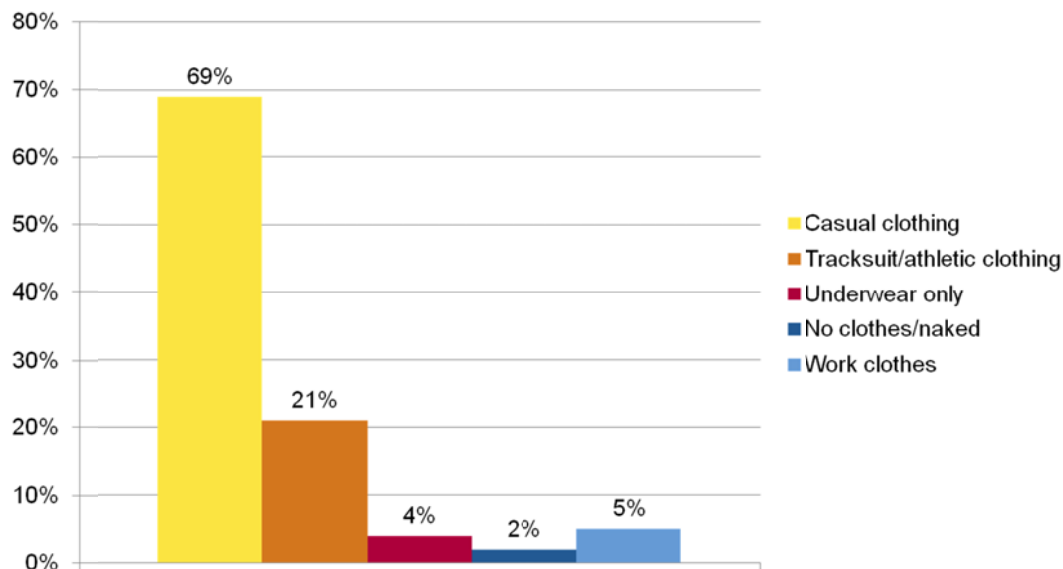
- More women globally than men say that they vacuum in the morning (40% vs. 35%), and more men than women (40% vs. 35%) say that they vacuum in the afternoon or in the evening.
- More men than women say that they vacuum less often in the winter (24% vs. 17%), but apart from winter vacuuming there are few really big differences between men and women when it comes to timing.

### Age differences in timing

- 37% of the younger generation (18-30) prefers to vacuum during weekends compared to their parents in the 51-60 and 61-70 age groups, where only 31% and 22% vacuum during weekends.
- Mornings are not so popular for vacuuming among the 18-30 years old. Only 27% prefer this time of the day, compared to the global average of 38% and 49% of the 61-70 years old.

### 4. Clothing when vacuuming

- 4% wear underwear only when vacuuming and 2% claim they vacuum naked (over 300 respondents in this survey)
- 21% wear a tracksuit/athletic clothing when vacuuming
- Most other people (69%) vacuum in casual clothing



**Graph 6: What do you in most cases wear when you vacuum?**

### Country differences in clothing

- Vacuuming naked seems to be mainly a Nordic/North American habit. 3,7% of Norwegians, 3% of Swedes and US respondents in this survey say they have no clothes when vacuuming followed by Canadians (2,6%) and Finns (2,5%). At the other end of the scale we find Chileans (0,1%) and Japanese (0,1%) where naked vacuuming seems to be almost unheard of.
- While Colombians don't vacuum naked (0,3%), they are much more in favor of wearing underwear only when vacuuming. A whole 13,2% of Colombians prefer this outfit, followed by Finns (8,4%) and Chileans (8,1%), compared to the global average of 4%.
- A majority in most countries (69% in global average) prefers casual clothing when vacuuming, but there are exceptions. Only 18% of Koreans use this outfit and a whole 76% instead prefer a

tracksuit/athletic clothing when they vacuum. That is far more than the second on the 'prefer-tracksuit-list': Portugal with 41%. The global prefer-tracksuit average is 21%.

#### **Gender** differences in clothing

- While the total global percentage of people who vacuum in their underwear only or even without any clothes is relatively small (4% and 2% respectively), there are some difference between men and women. 2.5% of men say they vacuum naked while only 0.6% of women do the same. 5.7% of men and 2.4% of women say that they wear underwear only when vacuuming.

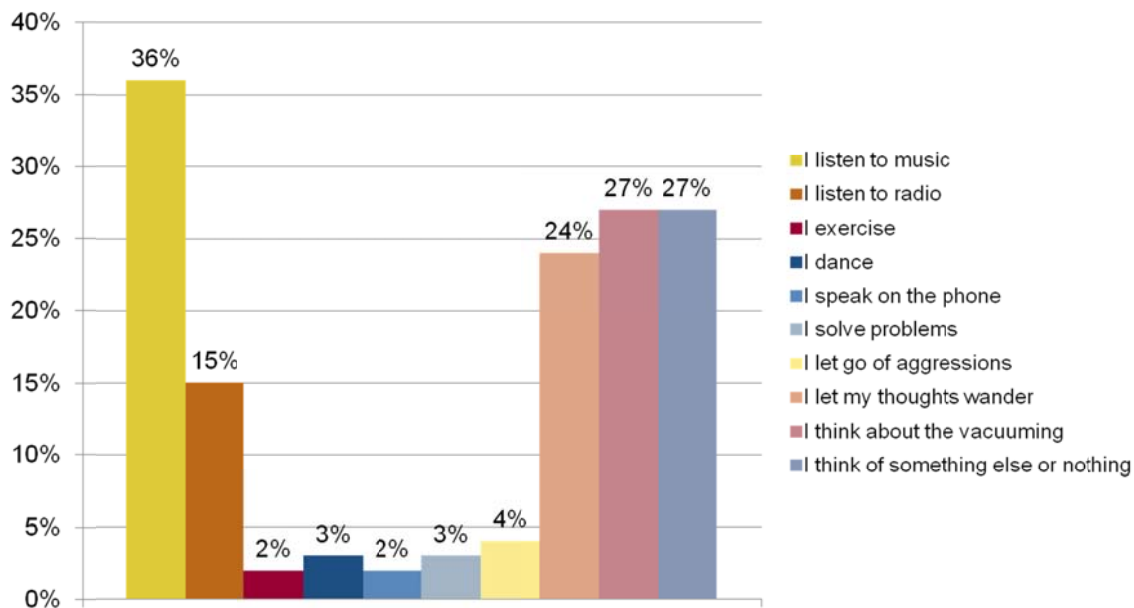
#### **Age** differences in clothing

- The younger generations (21% of the 18-30 age group) prefer to vacuum wearing tracksuits/athletic clothes while only 12% of the 61-70 years old prefers this outfit. 80% of this group dress in casual clothing instead, compared to 66% of the 18-40 years old.
- Underwear only when vacuuming is also a habit of the younger generation: 5% of the 18-30 age group prefers underwear compared to 3% of the 51+.
- Somewhat surprisingly, the percentages who say they prefer to vacuum naked do not differ significantly between the age groups: 2,1% of 18-30 and 1,6% of the 61-70 years old say that they in most cases vacuum naked.

#### **5. Doing when vacuuming**

- The most common thing to do in parallel to the cleaning is to listen to music (36%). Another 15% listen to radio.
- Most (22%) listen to a music mix and 12% to pop. Only listening to opera, blues, folk music, jazz, R&B/soul and reggae are not popular with vacuuming consumers (these music genres score 0-1% each in global average).
- Relatively few people to do something else when vacuum cleaning, like exercising, dancing, problem-solving, or talking in the phone. The global average for each of these activities is 2-4%





**Graph 7: What do you normally do while vacuuming?**

#### **Country** differences in 'doing when vacuuming'

- Most prone to listen to music when vacuuming are the Colombians (67%) and Mexicans (66%), while only 11% of Finns and Norwegians, and 8% of Japanese say they listen to music when vacuuming.
- Compared to global averages when it comes to music preferences when vacuuming a few countries stand out:
  - 7% of Thais listen to classical music compared to the global average of 3%
  - 13% of Thais, 13 % of Brazilians and 10% of Americans prefer to listen to country music compared to the global average of 3%. (Country music: Sertanejo in Brazil and Luk Thung in Thailand).
  - 9% of Turks listen to folk music when vacuuming compared to the global average of 1%
  - 11% of Koreans and 9% of Chinese prefer to listen to Asian pop when vacuuming compared to the global average of 2%. Koreans are also hip hop/rap fans as vacuuming music with a score of 6% compared to a global average of 2%
  - The jazz fans are found in Mexico with a score of 13% preference as vacuuming music compared to the global average of 1%
  - The rock/heavy metal fans are found in Brazil with a score of 12% preference as vacuuming music compared to the global average of 6%. The second most rock prone vacuuming country is Sweden with 10%.
- More Chinese than average say that they solve problems and let go of aggressions when vacuuming. 16% of Chinese solve problems compared to the global average of 3% and 13% of Chinese let go of aggressions when vacuuming compared to the global average of 4%. Mexicans also score high on letting go of aggressions (10%), but significantly fewer Mexicans (less than 2%) than Chinese solve problems when vacuuming.

- In most countries speaking on the phone while vacuuming seems to be done by around 2% of the population, but Thailand stands out from the crowd with 7%.

**Gender** differences in ‘doing when vacuuming’

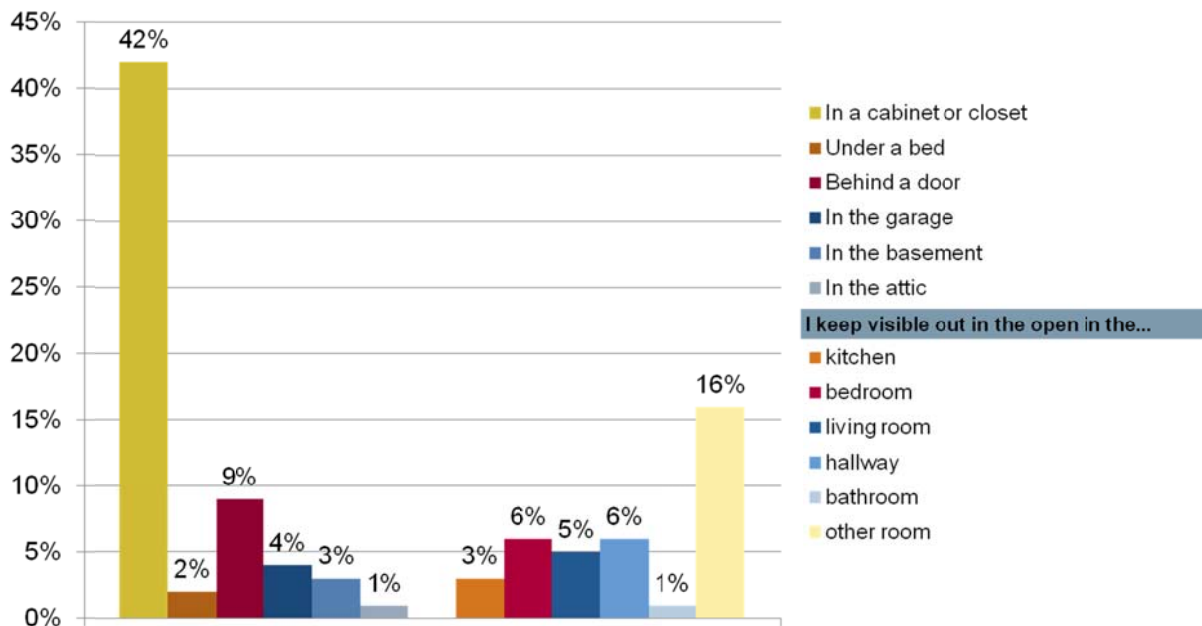
- More women than men (27% vs. 21%) say that they let their thoughts wander when vacuuming, while slightly more men compared to women think about the vacuuming (28% vs. 26%). More women than men dance while vacuuming (4% vs. 2%), but very few other differences can be traced between the sexes when vacuuming.

**Age** differences in ‘doing when vacuuming’

- Not surprisingly, a much higher percentage (51%) of the 18-30 years old listen to music when vacuuming compared to the +51 generation (19%). The younger generation also takes the opportunity to dance to a higher degree (6%) compared to the older +51 group (1%).

**6. Storage**

- Most vacuum cleaner owners (42%) keep their cleaner in a closet or cabinet
- 37% of vacuum cleaner owners globally keep their vac visible in a room.
- Most of them keep the cleaner visible in the hallway or in the bedroom (6% each)



**Graph 8: Where do you store your main vacuum cleaner?**

**Country** differences in storage

- While a most people (42%) in most countries keep their vacuum cleaner in a cabinet, Korea stands out as a clear exception. In Korea only 8% store the vac in a cabinet/closet, while a whole 27% keep

it visible out in the open in the living room (compared to 5% as the global average) and 14% keep it in the garage (compared to the global average of 4%).

- Apart from Korea, far more people in Japan and China (16% resp. 11%) than the global average, store their vacuum cleaners in the open in the living room.
- Storing the vacuum cleaner openly in the hallway is common in Norway (14%), Poland and the UK (13%), which is significantly above the global average of 6%.
- While 6% of people globally store their vacuum cleaner in the bedroom, Turkey stands out with 19% storing the vacuum cleaner there.

#### **Gender** differences in storage

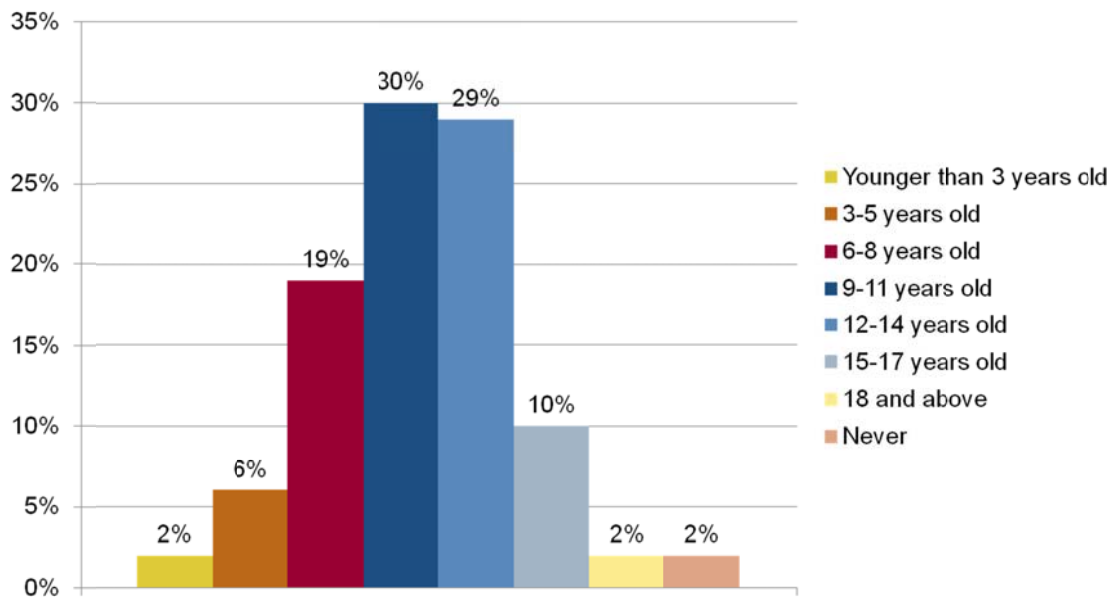
- There are no big differences between the sexes when it comes to storage. However, slightly more men (4,6%) compared to women (3,4%) say that they store the main vacuum cleaner in the garage.

#### **Age** differences in storage

- There are no big differences between the age groups when it comes to storage, but a few things can be noted: The older you are, the more likely that you store your vacuum cleaner in a cabinet or closet (39% in the group 18-30 vs. 51% in the 61-70 group). Consequently, it is more common among the 18-30 to store their vacs visible out in the open in the kitchen and living room (11% vs. global average of 8%).

### **7. Kids' vacuuming**

- 6% think that kids should start help with vacuuming when they are between 3-5 years old. An additional 2% even think kids below 3 years old should help out with the vacuuming
- At the other end, 2% think that kids should be 18 years and above when they start help with vacuuming
- Most common (30%) is that consumer think that kids should be between 9-11 years old when starting vacuuming, but a large group (19%) thinks 6-8 years is a suitable age.
- Most children below 18 years who live at home, help out with the vacuuming (62%)



**Graph 9: What do you think is the right age for kids/teenagers to start help out with vacuuming?**

#### **Country** differences in opinions on kids vacuuming

- Countries where a high share of respondents thinks that the right age is between 3-5 years old for kids to start help with the vacuum cleaning are: Finland (26%), Poland (13%), Russia (12%), and Norway (11%) compared to the global average of 6%.
- Finland, Poland and Russia also have significantly higher shares than average (36-38% versus global average of 19%) who think that kids should start help with vacuuming when they are between 6-8 years old.
- Korea and Turkey are the two countries in the survey where people tend to favor a relatively high age for kids to start help out with vacuum cleaning. 30% in each of these two countries think that kids should start help with vacuuming when they are between 15-17 years old (compared to global average of 10%). 9% and 10% of the Koreans and Turks also think that kids should be above 18 before they start to help with vacuuming, compared to the global average of 2%.
- In Thailand, 84% of children below 18 who live at home help out with the vacuum cleaning to some extent at least. In China and Russia, the number is 78% versus a global average of 62%.

#### **Gender** differences in opinions on kids vacuuming

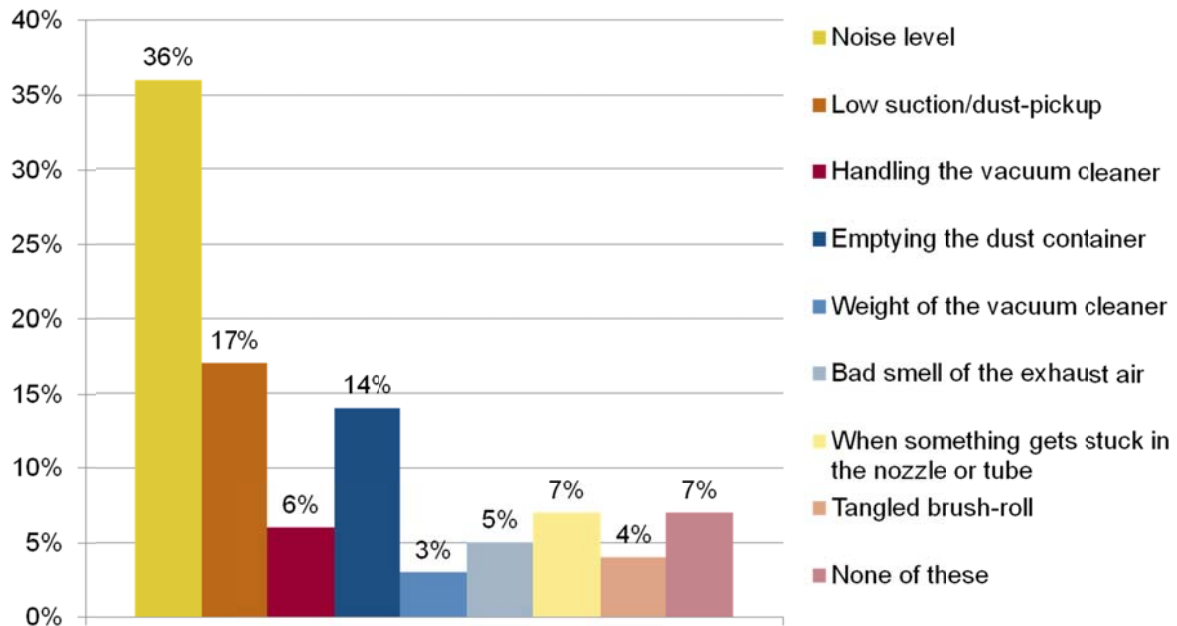
- Women are more prone to think that kids should start help-put with vacuuming in their early years. 9% of women, but only 6% of men think kids should start help-out before they are 5 years old. 21% of women and 18% of men think kids should start when they are 6-8 years old.

#### **Age** differences in opinions on kids vacuuming

- Overall, the younger you are the more you think that kids should wait until they are older to start help out with vacuuming. 40% of the 18-30 years old think that kids should be between 12-17 when they start helping out with vacuuming compared to 32% of the 61-70 years old.

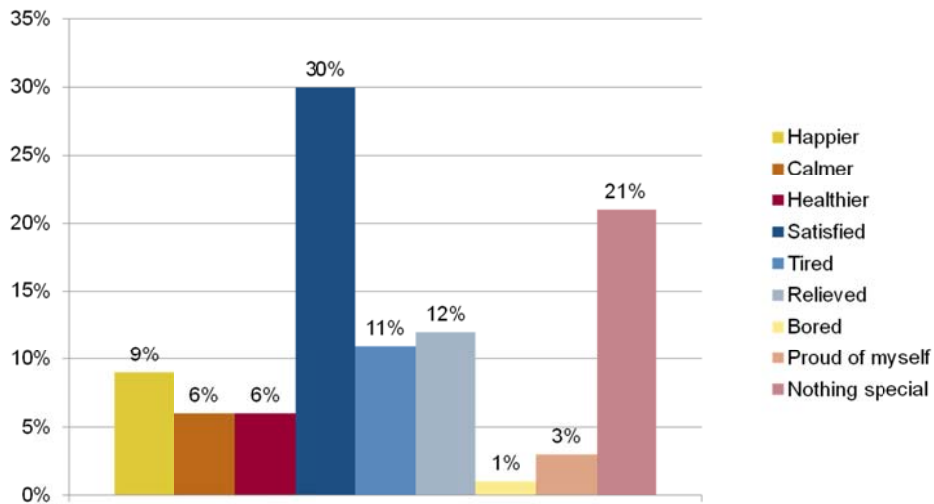
### 8. Feelings and annoying factors

- The single most annoying factor when vacuuming is the noise level (36%). It is more than double in importance than the second most annoying factor (low suction/dust-pickup; 17%). The third most annoying factor is emptying the dust container (14%)
- Weight of the cleaner is almost not an annoying factor at all. Only 3% list that as the most annoying factor when cleaning.



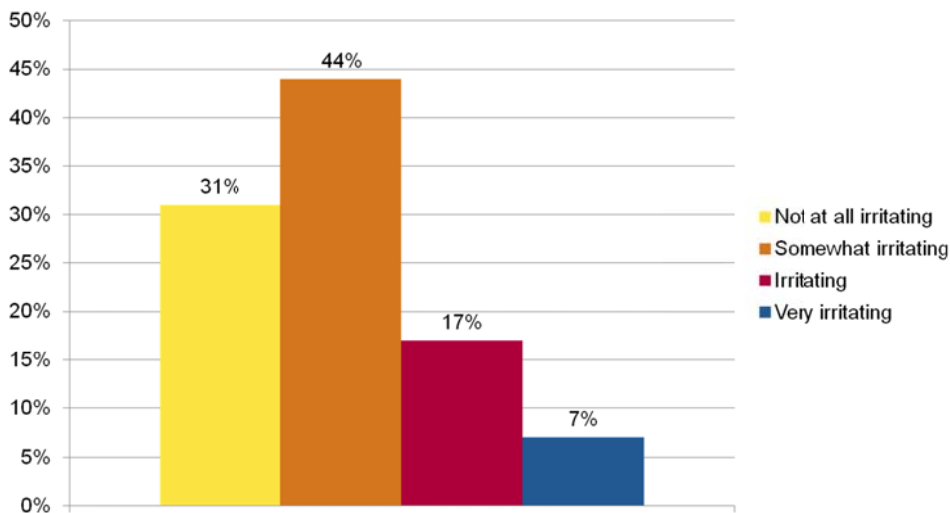
**Graph 10: Which is the most annoying factor when vacuuming?**

- Only 3% feel proud of themselves after vacuuming. The clearly most common feeling after vacuuming is satisfaction (30%), followed by relief (12%) and fatigue (11%). A lot of people are also indifferent (21%).



**Graph 11: How do you normally feel after vacuuming? I feel...**

- Of those owning a cleaner with a brush-roll, many know of the problem of untangling it from things that have got stuck, e.g. long hair. 36% untangles the roll after every cleaning. 24% think untangling is irritating or very irritating.



**Graph 12: How do you feel about untangling the brush roll?**

- Very few (8%) **never** looks in the dust-bag or dust container for that large thing they have heard being sucked into the cleaner
- 47% normally checks the dust-bag for that thing
- Almost as many (45%) say that it depends on what it is if they look or not.

#### **Country** differences in feelings and annoying factors

- The ones most prone to look in the dust-bag for something that is sucked into the vacuum cleaner are the Thais (77%) and the Russians (74%) compared to 47% of the survey population as a whole. The least prone to do so are the Norwegians (23%) and the Swedes (27%). A high percentage of the Norwegians and Swedes also say that it depends on what it is if they look for it or not.
- Thais, Brazilians and Koreans are the most annoyed by noise from the vacuum cleaner. 60% of Thais, 59% of Brazilians and 51% of Koreans think noise level is the most annoying factor when vacuuming. Least annoyed by noise are Australians (21%), Russians (22%) and Norwegians (22%).
- People in Russia (27%), the UK (24%), and Australia (23%) rate low suction/dust-pickup as the most annoying factor for vacuum cleaning, compared to the global average of 17%.
- Emptying the dust container is regarded as the most annoying factor by 14% of the global population. Many countries in South America have this factor high on the annoying list: Chile (29%), Argentina (28%) and Colombia (26%), compared to the global average of 14%. People in Russia also regard it as their second most annoying factor after low-suction.
- The most satisfied after vacuum cleaning are the Swedes (48%), followed by the Danes and the French (45%). Least satisfied after vacuuming are the Chileans (4%), who on the other hand top the tired list with 33% feeling tired after vacuuming compared to the global average of 11%. The Chileans also top the 'feeling calmer after vacuuming' list, with 19% compared to the global average of 6%.
- Most 'happy' after vacuum cleaning are the Koreans (26%), followed by the Turks (24%). The Turks were the ones who expressed most feelings after vacuuming with only 10% feeling 'nothing special' after vacuuming (global average 21%). Most indifferent were the Germans were 41% feel 'nothing special' after vacuuming.

#### **Gender** differences in feelings and annoying factors

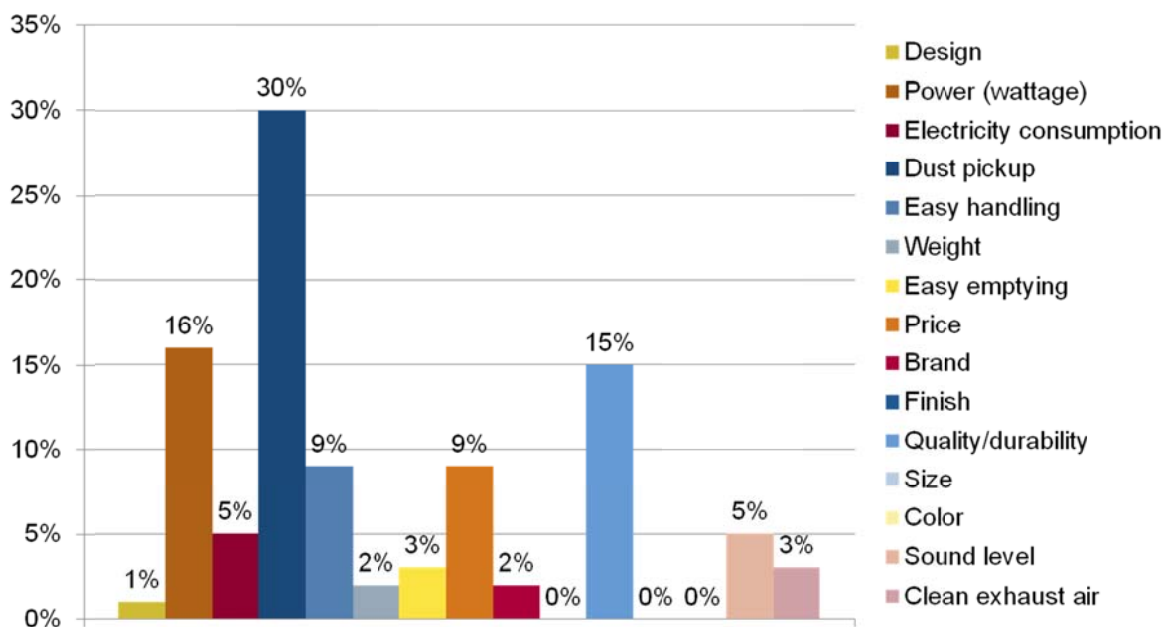
- Significantly more men (41%) than women (32%) say that they think noise is the most annoying factor when vacuuming. As a result, men also rate other annoying factors lower, e.g. 2% of men think the weight of the vac is the most annoying factor, while 4% of women do the same.
- There are some relatively small differences between men and women when it comes to feelings after vacuuming: More men feel calmer (7% vs. 6%), healthier (6% vs. 5%) and bored (1,6% vs. 0,9%) afterwards, while more women feel satisfied (32% vs. 29%), tired (12% vs. 10%) and relieved (13% vs. 11%) after vacuuming.

#### **Age** differences in feelings and annoying factors

- The younger you are, the more annoying you find the noise from the vacuum cleaner. 43% of the 18-30 years old find noise the most annoying factor when vacuuming compared to the global average of 36% and only 27% of the 61-70 years old. More people in the elderly groups find things stuck in the nozzle or tube the most annoying factor compared to the younger groups.

## 9. Buying a new cleaner

- Dust pickup is the single most important factor (30%) when buying a vacuum cleaner. Second most important (16%) is power/wattage, and quality/durability comes third (15%).
- Price is regarded as the single most important factor by only 9%.



**Graph 15: Which of the following do you think is the single most important factor when buying a vacuum cleaner?**

### Country differences when buying a new cleaner today

- With dust pickup as the single most important factor globally when buying a new vacuum cleaner (30% agree), there are still big differences between the different countries in how important this factor is. Dust pickup is most important for 57% of Chinese and 50% of Russians, but only for 9% of Mexicans and Argentines and for 7% of Colombians and French.
- For the French on the other hand, power/wattage is the single most important factor (35% agree), followed by Germans and Turks (25%). Power/wattage is of little importance to Chinese (2%), Finns (4%) and Swedes (5%).
- The quality/durability factor (third most important globally with 15%) is especially important for consumers in Thailand (30%), Colombia (27%) and the US (25%). Consumers in China and Japan,



most likely take this factor for granted. There 3% and 2% respectively think this is the most important factor when buying a new vacuum cleaner.

**Gender** differences when buying a new cleaner today

- Men and women across the globe agree that dust-pickup is the single most important factor when buying a new vacuum cleaner. They also agree on a number of other factors. However, easy handling is more crucial for women than men (11% vs. 8%), while more men put sound level as the most important factor (6% vs. 4%).

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**About Electrolux:**

Electrolux is a global leader in household appliances and appliances for professional use, selling more than 50 million products to customers in more than 150 markets every year. The company focuses on innovative solutions that are thoughtfully designed, based on extensive consumer insight, to meet the real needs of consumers and professionals. Electrolux products include refrigerators, dishwashers, washing machines, cookers, air-conditioners and small appliances such as vacuum cleaners sold under esteemed brands like Electrolux, AEG, Zanussi and Frigidaire. In 2012, the Electrolux Group had sales of SEK 110 billion and 61,000 employees. For more information go to [www.electrolux.com/press](http://www.electrolux.com/press) and [www.electrolux.com/news](http://www.electrolux.com/news).

**\*About Cint**

Cint is a company that develop and market leading SaaS, web-based software solutions for businesses, organizations and individuals involved in market research. Headquartered in Stockholm, Sweden, Cint has offices across Europe, Asia and North America.

**\*\*About Netigate**

Netigate is a Swedish SaaS company that provides tools and solutions for online research. Netigate allows everyone to perform advanced surveys in a very simple manner via Internet or mobile phones. The company was founded in 2005 and now employs approximately 70 people. Netigate has its head office in Stockholm, Sweden and has additional offices in Norway, Germany and Poland. Among our customers you find several of Europe's leading companies, for example Electrolux, Ericsson, Vodafone, E.ON and DB Schenker.