

CASE STUDY: Detergents — Research Report

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1. EXECUTIVE SUMMARY

The analysis of 102 transcripts reveals a complex interplay between stated brand loyalty and actual purchasing behavior in the Thai laundry detergent category. While a significant portion of respondents (90%)[1] claim to primarily use one brand, their actual behavior often deviates due to external factors, primarily price promotions and product availability. A substantial 80% of respondents[2] identify as heavy rotators or switchers, indicating that loyalty is often conditional rather than exclusive.

A key finding is the pervasive influence of price and promotions, with 'buy 1 get 1' offers being a particularly strong trigger for switching, mentioned by 25% of respondents[3]. Out-of-stock situations for preferred brands also frequently lead to switching, affecting 12% of respondents[4]. This highlights a category where functional benefits and immediate value often override deeply ingrained brand preference at the point of purchase.

The tension between cleaning efficacy and fragrance preference is central to choice. While brands like Breeze, Attack, and Omo are consistently associated with strong cleaning power, Downy and Hygiene are highly valued for their long-lasting and appealing scents. Many respondents manage multi-brand portfolios to address these distinct needs, using one brand for heavy-duty cleaning and another for fragrance. Latent preferences for brands other than their primary choice are common, with 43% of respondents[5] rating a non-main brand as equal or higher on personality/love dimensions, often due to superior fragrance or perceived modernity. Inherited brand use, passed down from mothers, also plays a role, influencing 29% of respondents[6], though this loyalty is often reinforced by perceived quality or price rather than pure sentiment.

2. ANALYSIS BY TOPIC

OPENING

Respondents generally provided straightforward answers about their last purchase, typically mentioning the brand and the retail channel (e.g., 7-Eleven, Lotus's, Big C, Shopee). This section primarily served its purpose of warming up respondents and confirming recent purchase occasions, often volunteering details about promotions or product attributes that were later probed.

PROBE P1 - Format mismatch

This probe was not triggered for any respondent based on the provided data and rules.

PROBE P2 - Claimed exclusive loyalty with in-store decision / Heavy rotator

A significant majority of respondents (80%)[2] identified as heavy rotators or switchers (q9_loyalty = 'whatever' or 'one_of_few'). Even among the 18% of respondents[7] who claimed exclusive loyalty (q9_loyalty = 'exclusive'), many revealed conditional loyalty. For instance, 12% of respondents[4] stated they would switch if their preferred brand was out of stock. The primary drivers for switching or rotating brands were overwhelmingly price and promotions, mentioned by 83% of respondents[8]. Common promotional triggers included 'buy 1 get 1' (25%)[3] and discounts ranging from 5% to 30% or specific amounts like 10-50 baht (36%)[9]. The desire to try new scents or products also motivated switching for 29% of respondents[10]. Despite switching, many respondents (32%)[11] expressed a tendency to return to their main brand, often citing superior cleaning performance or preferred scent.

PROBE P3 - Habit-vs-preference gap

A notable finding is the frequent gap between a respondent's main brand and the brand they rate highest on 'love/personality' dimensions. 43% of respondents[5] indicated using a main brand while rating another brand as equally or more aligned with their personality or lifestyle. This gap is often attributed to price differences (28%)[12], availability (12%)[4], or the main brand's superior functional performance (e.g., cleaning power), even if another brand offers a more appealing scent or image (32%)[13]. For example, R4 uses Breeze for cleaning but feels Pao and Downy align more with her personality, prioritizing cleaning efficacy over personal alignment. Inherited habit also plays a role, with 29% of respondents[6] mentioning their mother's brand as a factor in their choice, sometimes overriding personal preference.

PROBE P4 - Image-reality gap / Inherited brand

Respondents often associate brands with clear personas. Brands like Breeze and Attack are frequently linked to efficiency, cleanliness, and family-oriented individuals (e.g., 'คนทำงาน เล่นกีฬา' [R98], 'รักความสะอาด ใส่ใจคุณภาพ' [R29], 'คนที่มีความสามารถมีความจริงจัง' [R34]). Fragrance-focused brands like Downy and Hygiene evoke images of modernity, pleasantness, and self-care (e.g., 'อ่อนโยน ดูน่าค้นหา' [R2], 'คนที่มีความอบอุ่นชอบความหอม' [R26], 'คนอ่อนหวานนุ่มละมุน' [R84]). Pao is sometimes seen as a brand for older homemakers or those seeking value (e.g., 'แม่บ้านอายุเยอะหน่อย' [R19]). Many respondents (41%)[14] identify with the persona of their main brand, reinforcing their choice.

Inherited brand use is a significant loyalty mechanism, with 29% of respondents[6] explicitly stating that their mother used a particular brand. For some, this translates to active use due to a strong emotional connection or perceived reliability (e.g., R3, R28, R52, R54, R80). For others, it's more of a nostalgic recognition, with current choices driven by personal preference or price (e.g., R9, R36, R48).

PROBE P5 - Switched from plan

This was a high-value probe, capturing live switching moments. 7% of respondents[15] explicitly stated they intended to buy one brand but switched to another. The primary reasons for these switches were out-of-stock situations (e.g., R8, R32, R49) or attractive promotions (e.g., R6, R14, R92, R98, R101). The new choice often did not stick long-term, with 86% of these switchers[16] indicating they would return to their original planned brand after the trial, suggesting that these switches are often opportunistic rather than a fundamental shift in preference.

PROBE P6 - Autopilot claim with external influence / Channel-decision mismatch

Many respondents (85%)[17] claimed to purchase their main brand on "autopilot" (q16_decision_offline/online = 'always_same') yet also cited external influences like promotions, advertising, or packaging. Probing revealed that for many of these respondents[18], these influences acted as "recognition-reinforcers" for their existing brand choice, or as triggers for opportunistic purchases of other brands when promotions were strong (e.g., R3, R9, R25, R40, R56, R62, R63, R77, R81, R83, R88, R92, R94, R96, R97, R101). Only 7% of respondents[19] explicitly stated that external influences had no effect on their autopilot behavior. The 'autopilot' is often conditional, easily overridden by compelling promotions or out-of-stock situations.

Online unplanned purchases (P6b) were rare, with only 1 respondent (R82) explicitly stating an unplanned online purchase. This respondent was driven by a discount.

CLOSING

The closing question, asking for a single desired change, consistently highlighted key areas for brand improvement. The most frequent requests were for better pricing/value (21%)[20], enhanced or longer-lasting fragrance (25%)[21], and improved cleaning efficacy (11%)[22]. Environmental friendliness and gentleness on skin/fabric were also mentioned (10%)[23]. This indicates that while current offerings meet basic needs, there's a desire for brands to excel further in these core areas.

3. NOTABLE QUOTES BY TOPIC

OPENING

Respondent 23: "[ผงซักฟอกกำลังจะหมดจำเป็นต้องซื้อผงซักฟอกกำลังจะหมดจำเป็นต้องซื้อดูเลย]"

(Detergent is running out, need to stock up on detergent.)

PROBE P2 - Claimed exclusive loyalty with in-store decision / Heavy rotator

Respondent 3: "[ลดเท่าไรก็ได้ขอแค่ลด]"

(Any discount is fine, as long as there's a discount.)

Respondent 8: "[เพราะแบรนด์นั้นหมดเลยเลือกไฮยีนส์แทน]"

(Because that brand was out of stock, so I chose Hygiene instead.)

Respondent 9: "[ต้องลดราคาประมาณ20-30%หรือมีโปรโมชันซื้อ 1 แถม 1 ถึงจะดึงดูดใจพอให้ตัดสินใจลองเปลี่ยนจากบรีสไปซื้อแบรนด์อื่นในตอนนั้น]"

(Must be a discount of about 20-30% or a buy 1 get 1 promotion to be attractive enough to decide to switch from Breeze to another brand at that time.)

Respondent 15: "[ฉันรู้สึกว่ามันคุ้มค่าเงินมากค่ะ เนื่องจากซักเสื้อผ้าแต่ละครั้งใช้น้ำยาเยอะมาก และฉันจะซื้อไปกักตุนไว้ใช้ได้หลายเดือนค่ะ]"

(I feel it's very good value for money. Because each time I wash clothes, I use a lot of detergent, and I buy it to stock up for several months.)

PROBE P3 - Habit-vs-preference gap

Respondent 3: "[เพราะใช้มาตั้งแต่รุ่นแม่แล้วค่ะ]"

(Because I've been using it since my mother's generation.)

Respondent 4: "[ต้องการความสะอาดซักคราบหมดจด]"

(Need cleanliness, removes stains completely.)

Respondent 9:

"[แม้จะเชื่อมั่นในประสิทธิภาพการซักสะอาดของบริษัมากที่สุด แต่ก็ชื่นชอบความหอมของอีกสองแบรนด์ในระดับที่ใกล้เคียงกัน]"

(Even though I trust Breeze's cleaning performance the most, I also like the fragrance of the other two brands to a similar extent.)

Respondent 12: "[สิ่งที่ทำให้อยากใช้โอโมอยู่เนื่องจากหาซื้อง่ายราคาถูกทำความสะอาดได้ดี]"

(What makes me want to use Omo is that it's easy to find, cheap, and cleans well.)

PROBE P4 - Image-reality gap / Inherited brand

Respondent 19: "[แม่บ้านอายุเยอะหน่อย]"

(A bit older homemaker.)

Respondent 36: "[ไม่ชอบกลิ่นของแอทแทค กลิ่นค่อนข้างแรง ฉุน ชอบกลิ่นของไฮยีนมากกว่า กลิ่นหอมอ่อนๆ แต่ติดทนนานมาก]"

(Don't like the scent of Attack, the scent is quite strong, pungent. Prefer Hygiene's scent, a soft fragrance but very long-lasting.)

Respondent 41: "[ทำงานในไร่เหงื่อเยอะ เวลาซักรู้สึกได้เลยว่าเสื้อผ้าสะอาด]"

(Working in the fields, sweating a lot. When washing, I can really feel that the clothes are clean.)

Respondent 56:

"[นึกถึงคนใช้แล้วนี่ก็คือคุณแม่สมัยใหม่ที่มีความเท่มีความเปรี้ยวเหมือนชมพู่อรียาหรืออะไรอย่างเงาะดูแล้วดูสวยดูดีท่ามีความพร้อม]"

(I think of modern mothers who are cool, like Chompoo Araya or someone like that. Looks cool, beautiful, ready.)

PROBE P5 - Switched from plan

Respondent 6: "[ฉันทิ้งระหว่างคาวานี่ และไฮยีน สุดท้ายฉันเลือกไฮยีนเพราะชอบกลิ่นมากกว่า]"

(I chose between Downy and Hygiene. In the end, I chose Hygiene because I liked the scent more.)

Respondent 8: "[เพราะแบรนด์นั้นหมดอะเลยเล็กไฮยีนส์แทน]"

(Because that brand was out of stock, so I chose Hygiene instead.)

Respondent 92: "[บริคเอ็เซลซื้อหนึ่งแถมหนึ่ง]"

(Breeze Excel buy one get one free.)

PROBE P6 - Autopilot claim with external influence / Channel-decision mismatch

Respondent 3: "[ส่วนมากเพื่อนจะแนะนำแบรนด์ที่มีโปรโมชันลดราคาเราก็จะสนใจ]"

(Mostly friends recommend brands with discount promotions, so we become interested.)

Respondent 9:

"[ปกติตั้งใจไปซื้อบริสอยู่แล้วแต่ดีไซน์ที่เด่นบนชั้นวางจะช่วยให้หาของได้ไวขึ้นส่วนโปรโมชันจะมีผลในแง่ของขนาดเช่นถ้าตัวที่ตั้งใจซื้อไม่มีลดราคาแต่ถุงใหญ่กว่ามีโปรโมชันคุ้มกว่าก็จะเลือกหยิบตัวที่มีโปรโมชันของบริสในตอนนั้นแทน]"

(Normally I intend to buy Breeze, but the prominent design on the shelf helps me find it faster. Promotions affect the size, for example, if the one I intended to buy isn't on sale, but a larger bag has a better promotion, I'll pick the one with the Breeze promotion at that time instead.)

Respondent 56:

"[การเลือกคาวนนี่ทำให้มีความรู้สึกเรามีความพร้อมเรามีเป็นสามัญมีความแบบคนรุ่นใหม่ที่เราเลือกสิ่งดีๆให้กับชีวิตให้กับครอบครัวเราแต่งตัวออกไปเสื้อผ้ากลิ่นหอมทำให้เรามีความมั่นใจในตัวองว่าไม่มีเสื้อผ้าไม่มีติดคอกลิ้นเหงื่อหรือกลิ่นอาหารที่เราปรุงอาหารให้ครอบครัว]"

(Choosing Downy makes me feel ready, modern, choosing good things for my life and family. When I dress up, my clothes smell good, making me confident that my clothes won't have sweat odor or food smell from cooking for my family.)

CLOSING

Respondent 18: "[ราคาอะ]"

(Price.)

Respondent 20: "[กลิ่นความหอมอย่างเดียวละ]"

(Only the fragrance.)

Respondent 55:

"[ฉันอยากเห็นแบรนด์ที่ทำหน้าที่เป็นทั้งผงซักฟอกและน้ำยาปรับผ้านุ่มในตัวเดียวแบบหนึ่งร้อยเปอร์เซ็นต์คือไม่ใช่แค่เอาสองอย่างมาผสม]"

มันเจ๋งๆแต่เป็นนวัตกรรมที่สามารถซักคราบหนักได้เด็ดขาดแบบปริชแต่ในขณะเดียวกันก็ต้องทำให้เสื้อผ้านุ่มและก็หอมติดทนนานเหม็นอับที่ออกมาจากร้านซักแห้ง โดยที่เราไม่ต้องซื้อน้ำยาบักผ้านุ่มแยกอีกเลย]"

(I want to see a brand that functions as both detergent and fabric softener 100% in one product. Not just mixing the two, but an innovation that can remove tough stains decisively like Breeze, while also making fabric soft and fluffy and long-lasting fragrant, like it just came from a dry cleaner, without us having to buy separate fabric softener anymore.)

4. EMOTIONAL MOMENTS & SENTIMENT

Confidence & Satisfaction

Many respondents expressed a strong sense of confidence and satisfaction with their chosen brands, particularly regarding cleaning efficacy and pleasant scents. This confidence often stems from consistent positive experiences and the ability of the product to meet their expectations for cleanliness and freshness.

- Context: Discussing the main brand's performance or the feeling after washing clothes.
- Quote: Respondent 9:
"[เช่นเวลาที่ฉันมีชุดตัวเก่งที่ต้องใส่ไปงานสำคัญหรืองานเลี้ยงฉันจะเลือกใช้บรีสซักเสมอเพราะมั่นใจว่าคราบสกปรกจะออกหมดและเสื้อผ้าจะมีกลิ่นหอมสะอาดติดทนนานทำให้ฉันรู้สึกมั่นใจตลอดทั้งวันโดยไม่ต้องกังวลเรื่องกลิ่นอับ]" (For example, when I have a favorite outfit for an important event or party, I always choose Breeze to wash it because I'm confident that all stains will be removed and the clothes will have a long-lasting clean scent, making me feel confident all day without worrying about musty smells.)
- Pattern: This sentiment is widespread, with 64% of respondents[24] expressing confidence in their main brand's ability to clean effectively or provide a desirable scent. This confidence is a key factor in their continued use, even when other brands offer promotions.

Regret & Disappointment

Conversely, some respondents conveyed regret or disappointment when their preferred brand was unavailable or when a trial product failed to meet expectations. This highlights the emotional investment users have in their laundry routines and the disruption caused by unmet needs.

- Context: When a preferred brand is out of stock or when trying a new brand that doesn't perform as well.
- Quote: Respondent 45: "[เคยค่ะ รู้สึกเสียดายค่ะ เพราะปกติชอบใช้บรีสค่ะ]" (Yes, I have. I feel regret because I normally like using Breeze.)

- Pattern: This emotion, though less frequent, appeared in 3% of respondents[25], particularly when faced with out-of-stock situations for their preferred brand. Another instance of disappointment arose when a trial brand did not deliver on its promises, as seen with R63 who felt "ผิดหวัง" (disappointed) when a new brand didn't clean well.

Curiosity & Desire for Novelty

A notable undercurrent is a strong curiosity and desire to try new products, especially new scents or innovative formulas. This suggests that while habit is strong, consumers are open to exploration if a new offering presents a compelling reason.

- Context: Responding to questions about switching behavior or what would make them try a new brand.
- Quote: Respondent 56:
 "[อะไรที่ทำให้บางครั้งเปลี่ยนเป็นใช้แบรนด์อื่นหนึ่งอาจจะเห็นโฆษณาทำให้อยากลองสินค้าหรือกลิ่นใหม่สองเรียกการโปรโมชันการลดราคาเมื่อเห็นการลดราคาบางครั้งก็อยากจะลองตัวใหม่ดูก็ได้สิ่งใหม่ๆกลับมา]" (What makes me sometimes switch to another brand? First, I might see an advertisement that makes me want to try a new product or scent. Second, promotions or discounts. When I see a discount, sometimes I want to try a new one, so I end up with new things.)
- Pattern: This desire to explore new scents or products was evident in 29% of respondents[10], often triggered by advertising, social media reviews, or attractive packaging. This curiosity, however, is often balanced with a return to trusted brands if the new experience isn't superior.

Comfort & Personal Alignment

Many respondents associate specific brands with feelings of comfort, freshness, and personal alignment, particularly through scent. This emotional connection goes beyond mere functionality.

- Context: Describing the feeling of wearing clothes washed with a preferred brand or defining the persona of a brand user.
- Quote: Respondent 26: "[เป็นเหมือนคนที่มีความอบอุ่นชอบความหอมใส่แล้วสบายใจ]" (Like someone who is warm, likes fragrance, feels comfortable when wearing it.)
- Pattern: This sentiment was expressed by 10% of respondents[26], linking specific scents to personal well-being, confidence, and a sense of freshness throughout the day.

Addressing Client Objectives

This analysis directly addresses the client's objectives and hypotheses, providing evidence from the qualitative data.

1. Understand the gap between stated brand loyalty and actual brand-choice behavior:

The data strongly indicates a significant gap. While 90% of respondents[1] claim to mostly use one brand, and 18%[7] claim exclusive loyalty, their actual behavior reveals a high degree of fluidity. A substantial 80% of respondents[2] admit to rotating between brands or switching when conditions are favorable. The "autopilot" claim (85%)[17] is often conditional, easily overridden by external influences. This suggests that stated loyalty in quantitative surveys may reflect a primary preference or habit rather than an unwavering commitment.

2. Identify the patterns underlying respondents' loyalty claims (habit, price, family, latent preference, multi-dimensional substitution):

- **Habit:** This is a strong underlying factor. Many respondents explicitly state they use a brand "เป็นประจำ" (regularly) or "ใช้มานาน" (used for a long time) (e.g., R1, R13, R40, R52, R72). For 22% of respondents[27], habit is a primary reason for sticking with their main brand, even when other brands offer similar benefits or better prices.
- **Price:** This is the most dominant driver of actual choice behavior. 83% of respondents[8] mention price or promotions as the primary reason for switching or considering other brands. The "buy 1 get 1" promotion is a particularly powerful trigger, mentioned by 25% of respondents[3], often leading to immediate switching even from a planned purchase. Discounts of 10-30% or even 5-10 baht are sufficient to prompt a switch for many (36%)[9].
- **Family/Inherited:** This is a distinct loyalty mechanism, influencing 29% of respondents[6]. Phrases like "แม่ใช้" (mother uses) or "ใช้มาตั้งแต่รุ่นแม่" (used since mother's generation) are common (e.g., R3, R28, R52, R54, R80). This inherited loyalty is often reinforced by perceived quality or value, rather than being purely sentimental.
- **Latent Preference:** This is a significant finding. 43% of respondents[5] use a main brand but rate a non-main brand as equal or higher on personality/love dimensions. This suggests an underlying attraction to other brands that doesn't always translate into purchase due to factors like price, availability, or the main brand's superior functional performance. For example, R4 uses Breeze for cleaning but feels Pao and Downy align more with her personality.
- **Multi-dimensional Substitution:** This pattern is highly prevalent. 80% of respondents[2] are not exclusively loyal to a single brand. Many maintain a portfolio of brands, switching based on specific needs or opportunistic factors. For instance, R48 uses Breeze for heavy stains and adults' clothes, but D-Nee for children's clothes. R68 uses Downy for herself (due to preferred scent) and Hygiene/Breeze for other family

members. This demonstrates that "loyalty" often means loyalty to a *set* of brands that fulfill different roles, rather than a single brand.

3. Surface the cleaning-vs-fragrance tension that defines category choice:

This tension is a central theme.

- **Cleaning Brands:** Breeze, Attack, and Omo are consistently associated with strong cleaning power, stain removal, and overall effectiveness. 30% of respondents[28] prioritize cleaning efficacy, often citing these brands for their ability to handle tough stains or ensure clothes are "สะอาดหมดจด" (completely clean).
- **Fragrance Brands:** Downy and Hygiene are predominantly chosen for their appealing and long-lasting scents. 30% of respondents[29] explicitly prioritize fragrance, often seeking "กลิ่นหอมติดทนนาน" (long-lasting fragrance) or "หอมสดชื่น" (fresh scent).
- **The Trade-off:** Many respondents acknowledge a trade-off. For example, R48 notes that Downy has a better scent but Breeze is superior for stain removal. R11 states Downy has more fragrance but Breeze is better at stain removal. This often leads to multi-brand usage, where consumers combine a strong cleaning detergent with a separate fabric softener (e.g., R48, R60, R65) or rotate between detergents based on the primary need for a particular wash load (e.g., R37, R68, R77, R85, R100).

Hypotheses & areas of interest

- A meaningful share of respondents who claim to be "loyal" to a single brand will reveal price-driven, habit-driven, or family-inherited patterns rather than genuine preference.
- **Supported:** This hypothesis is strongly supported. Even among those claiming exclusive loyalty, probing revealed that price (e.g., R6, R92, R98, R101), out-of-stock situations (e.g., R8, R32, R49), or family influence (e.g., R86) often drive actual purchase decisions. The "autopilot" behavior is frequently a habit reinforced by availability and acceptable performance, rather than a deep, unwavering preference.
- Many respondents will rate a non-main brand as equal or higher on personality/trust/love dimensions (the "latent preference" gap). Promotional pricing, fragrance preferences, and switching-cost inertia are likely drivers.
- **Strongly Supported:** 43% of respondents[5] exhibit this latent preference. Promotional pricing (28%)[12] is a clear driver preventing the switch to the "loved" brand. Fragrance preferences are also a major factor, with many expressing a liking for the scent of a non-main brand (e.g., R9, R18, R31, R52, R56, R59, R66, R68, R75, R78, R82, R84, R88, R89, R93, R95, R97, R98, R100). Switching-cost inertia (the perceived effort

or risk of changing a routine) is also evident, as many return to their main brand even after a positive trial of another (e.g., R9, R14, R34, R55, R63).

- The category appears to split mentally into "cleaning brands" (Breeze, Attack, Omo) and "fragrance brands" (Hygiene, Downy), with Pao occupying the price/value role. Respondents likely run multi-brand portfolios across this dimensional split rather than single-brand loyalty.
- Strongly Supported: The data clearly shows this mental split. Breeze (e.g., R4, R11, R23, R35, R42, R48, R55, R58, R62, R63, R71, R73, R74, R77, R83, R85, R89, R90, R92, R94, R95, R96, R102), Attack (e.g., R1, R12, R17, R32, R40, R50, R51, R58, R59, R62, R63, R72, R73, R74, R77, R83, R85, R88, R89, R90, R94, R95, R102), and Omo (e.g., R3, R10, R12, R15, R22, R28, R29, R30, R32, R34, R41, R45, R49, R51, R54, R55, R56, R70, R75, R76, R80, R83, R85, R87, R88, R89, R94, R95, R96, R97, R98, R99, R100, R102) are consistently praised for cleaning. Downy (e.g., R2, R6, R9, R11, R14, R18, R20, R21, R26, R31, R33, R37, R39, R40, R42, R43, R45, R46, R47, R48, R52, R54, R56, R59, R60, R61, R62, R63, R64, R65, R67, R68, R69, R71, R75, R77, R78, R79, R82, R83, R84, R85, R88, R89, R90, R93, R94, R95, R97, R99, R100, R102) and Hygiene (e.g., R2, R6, R8, R9, R11, R12, R13, R16, R18, R20, R21, R22, R25, R28, R30, R31, R36, R38, R39, R40, R42, R43, R44, R45, R46, R47, R48, R52, R54, R56, R59, R60, R61, R64, R65, R66, R67, R68, R72, R75, R76, R77, R78, R81, R82, R83, R84, R85, R86, R88, R89, R90, R91, R94, R95, R96, R97, R98, R99, R100, R102) are frequently chosen for scent. Pao is indeed seen as a value option, often chosen for its affordability (e.g., R13, R44, R50, R86). The widespread multi-brand usage (80%)[2] confirms that consumers build portfolios to meet diverse needs.
- Promotional thresholds for switching (price drop %, buy-1-get-1) will cluster around respondent-mentioned numbers — a real elasticity signal rather than just stated price-sensitivity.
- Supported: The data provides clear elasticity signals. The "buy 1 get 1" promotion is a highly effective trigger, mentioned by 25% of respondents[3]. Specific price drops mentioned include "ประมาณ 20%" (R7), "10 บาท" (R8), "20-30%" (R9, R18, R78), "5-10 บาท" (R14), "ถูกกว่าถึงสิบเซ็นต์" (R22), "ลดราคาประมาณสามสิบเปอร์เซ็นต์" (R24), "ซื้อ 3 แถม 2" (R30), "15 เปอร์เซ็นต์ขึ้นไป" (R83), and "10-50บาท/ถุง" (R100). This demonstrates concrete price elasticity rather than vague price sensitivity.
- Family/inherited brand-use ("my mother's brand") will appear as a distinct loyalty mechanism, separate from personal preference.
- Supported: Family/inherited brand use is indeed a distinct mechanism, mentioned by 29% of respondents[6]. While it often initiates usage, personal preference and

perceived product quality (e.g., R3, R28, R52, R54, R80) or price (e.g., R28) often become reinforcing factors. In some cases, personal preference for scent or performance can override inherited loyalty (e.g., R36, R48).

References

[1] Claimed primary brand use (count of 102): R1, R2, R3, R4, R5, R6, R7, R8, R9, R10, R11, R12, R14, R17, R18, R19, R20, R21, R22, R23, R24, R25, R26, R27, R28, R29, R30, R31, R32, R34, R35, R36, R37, R38, R40, R41, R42, R43, R44, R45, R46, R47, R48, R49, R50, R51, R52, R53, R54, R55, R56, R57, R58, R59, R60, R61, R62, R63, R65, R66, R67, R68, R69, R71, R73, R74, R75, R76, R77, R78, R79, R80, R83, R84, R85, R86, R87, R88, R89, R90, R91, R92, R93, R94, R95, R96, R97, R98, R99, R100, R101, R102

[2] Heavy rotators or switchers (count of 102): R1, R2, R3, R4, R5, R7, R8, R9, R10, R11, R12, R13, R14, R15, R16, R17, R18, R19, R20, R21, R22, R23, R24, R25, R26, R27, R28, R29, R30, R31, R32, R33, R34, R35, R37, R38, R39, R40, R42, R43, R44, R45, R46, R47, R48, R49, R50, R51, R52, R54, R55, R56, R57, R59, R60, R61, R64, R65, R66, R67, R68, R70, R71, R73, R74, R75, R76, R77, R78, R81, R82, R83, R87, R88, R89, R92, R93, R94, R95, R96, R97, R98, R100

[3] Buy 1 get 1 mentions (count of 102): R5, R9, R15, R24, R33, R39, R44, R45, R46, R49, R52, R53, R55, R56, R62, R65, R67, R69, R71, R75, R81, R83, R92, R94, R96, R101

[4] Out-of-stock as a switching trigger (count of 102): R2, R8, R28, R32, R41, R49, R54, R58, R73, R85, R90, R102

[5] Latent preference (non-main brand rated higher on love/personality) (count of 102): R3, R4, R8, R9, R12, R14, R18, R20, R22, R31, R32, R38, R40, R43, R45, R46, R48, R52, R54, R56, R59, R60, R61, R66, R67, R70, R75, R77, R78, R81, R82, R83, R86, R88, R90, R93, R94, R95, R96, R97, R98, R99, R100, R102

[6] Inherited brand use (mother used) (count of 102): R3, R5, R9, R12, R20, R22, R28, R36, R37, R40, R45, R46, R48, R52, R54, R57, R63, R66, R68, R71, R77, R78, R80, R85, R86, R88, R90, R99, R100, R102

[7] Claimed exclusive loyalty (count of 102): R6, R41, R51, R53, R62, R63, R69, R72, R79, R80, R84, R85, R86, R87, R90, R91, R99, R101

[8] Price/promotion as primary driver for switching/rotation (count of 102): R3, R4, R5, R7, R8, R9, R10, R11, R13, R14, R15, R16, R17, R18, R19, R20, R21, R22, R23, R24, R25, R26, R27, R28, R29, R30, R31, R32, R33, R34, R35, R37, R38, R39, R40, R42, R43, R44, R45, R46, R47, R49, R50, R52, R54, R55, R56, R57, R59, R60, R61, R62, R63, R64, R65, R66, R67, R68,

R69, R70, R71, R73, R74, R75, R76, R77, R78, R81, R82, R83, R85, R87, R88, R89, R92, R93, R94, R95, R96, R97, R98, R99, R100, R101, R102

[9] Specific price drop/discount mentions (count of 102): R3, R7, R8, R9, R14, R18, R22, R24, R30, R33, R35, R39, R49, R50, R52, R56, R59, R61, R62, R65, R66, R67, R69, R71, R75, R78, R81, R82, R83, R88, R92, R93, R94, R95, R96, R100, R101

[10] Desire to try new things/scents (count of 102): R1, R7, R9, R11, R18, R24, R29, R31, R33, R38, R40, R55, R56, R59, R60, R62, R67, R75, R76, R78, R82, R83, R84, R85, R86, R89, R90, R93, R95, R102

[11] Tendency to return to main brand after switching (count of 102): R1, R6, R9, R14, R19, R20, R26, R27, R28, R30, R32, R34, R40, R45, R46, R47, R49, R50, R55, R56, R58, R63, R69, R73, R74, R76, R77, R88, R89, R92, R93, R95, R102

[12] Price gap as reason for habit-preference gap (count of 102): R3, R4, R5, R8, R12, R14, R18, R20, R22, R32, R43, R45, R49, R50, R56, R59, R61, R64, R65, R66, R68, R75, R78, R82, R88, R93, R95, R96, R100

[13] Main brand's functional performance overriding latent preference (count of 102): R4, R9, R11, R12, R23, R31, R32, R35, R38, R40, R42, R43, R48, R52, R55, R58, R59, R61, R62, R63, R71, R73, R74, R77, R83, R85, R89, R90, R92, R94, R95, R96, R102

[14] Identification with main brand persona (count of 102): R1, R4, R17, R24, R25, R27, R29, R30, R35, R37, R39, R41, R42, R45, R47, R48, R52, R53, R54, R56, R57, R58, R62, R63, R68, R71, R73, R74, R76, R79, R80, R83, R84, R88, R89, R91, R92, R95, R96, R97, R98, R102

[15] Switched from plan (count of 102): R6, R8, R14, R32, R92, R98, R101

[16] Return to original planned brand after switching (count of 7): R8, R14, R32, R92, R98, R101

[17] Autopilot claim with external influence (count of 102): R3, R9, R10, R11, R12, R16, R17, R18, R19, R20, R21, R22, R23, R24, R25, R26, R27, R28, R29, R30, R31, R32, R33, R34, R35, R37, R38, R39, R40, R42, R43, R44, R45, R46, R47, R48, R49, R50, R51, R52, R54, R55, R56, R57, R58, R59, R60, R61, R62, R63, R64, R65, R66, R67, R68, R69, R70, R71, R73, R74, R75, R76, R77, R78, R79, R81, R82, R83, R84, R85, R86, R87, R88, R89, R90, R91, R92, R93, R94, R95, R96, R97, R98, R99, R100, R101, R102

[18] External influences as recognition-reinforcers or opportunistic triggers (count of 86): R3, R9, R10, R11, R12, R16, R17, R18, R19, R20, R21, R22, R23, R24, R25, R26, R27, R28, R29, R30, R31, R32, R33, R34, R35, R37, R38, R39, R40, R42, R43, R44, R45, R46, R47, R48, R49, R50, R51, R52, R54, R55, R56, R57, R59, R60, R61, R62, R63, R64, R65, R66, R67, R68, R69, R70, R71, R73, R74, R75, R76, R77, R78, R79, R81, R82, R83, R84, R85, R86, R87, R88, R89, R90, R91, R92, R93, R94, R95, R96, R97, R98, R99, R100, R101, R102

[19] External influences having no effect on autopilot (count of 7): R41, R53, R80, R91, R99, R101, R102

[20] Desired change: better pricing/value (count of 102): R13, R18, R22, R30, R32, R39, R44, R49, R50, R56, R60, R62, R64, R65, R70, R75, R81, R83, R95, R99, R100

[21] Desired change: enhanced/longer-lasting fragrance (count of 102): R15, R16, R19, R20, R21, R26, R27, R28, R33, R36, R48, R52, R54, R57, R59, R61, R68, R69, R78, R82, R84, R89, R93, R95, R97, R98

[22] Desired change: improved cleaning efficacy (count of 102): R11, R32, R38, R42, R61, R63, R64, R92, R95, R101, R102

[23] Desired change: environmental friendliness/gentleness (count of 102): R10, R17, R21, R31, R36, R40, R46, R56, R86, R96

[24] Expressed confidence/satisfaction in main brand (count of 102): R1, R6, R9, R13, R23, R24, R26, R27, R29, R30, R31, R32, R35, R37, R38, R41, R42, R44, R45, R48, R50, R52, R53, R54, R55, R56, R57, R58, R59, R61, R62, R63, R64, R65, R68, R69, R71, R72, R73, R74, R76, R77, R78, R79, R80, R81, R83, R84, R85, R86, R87, R88, R89, R90, R91, R92, R93, R94, R95, R96, R97, R98, R99, R100, R102

[25] Expressed regret/disappointment (count of 102): R45, R63, R73

[26] Linked scent to personal comfort/confidence (count of 102): R26, R37, R48, R56, R68, R84, R88, R91, R93, R95

[27] Habit as primary reason for loyalty (count of 102): R1, R13, R40, R41, R52, R53, R58, R62, R63, R69, R72, R79, R80, R84, R85, R86, R87, R90, R91, R99, R101, R102

[28] Prioritized cleaning efficacy (count of 102): R1, R4, R11, R23, R30, R32, R34, R35, R38, R42, R48, R50, R53, R55, R58, R62, R63, R71, R73, R74, R77, R80, R83, R85, R89, R90, R92, R94, R95, R96, R102

[29] Prioritized fragrance (count of 102): R2, R6, R9, R18, R20, R21, R26, R31, R33, R36, R37, R48, R52, R54, R59, R61, R65, R68, R69, R78, R82, R84, R85, R88, R89, R91, R93, R95, R97, R98, R102