

Detergents in Thailand

The Loyalty Illusion: Stated vs. Actual Behaviour

CLIENT

Be Digital Case Study

METHODOLOGY

AI-Moderated In-Depth Interviews

FIELDWORK DATE

April 2026

SAMPLE SIZE

102 Completed Interviews

TARGET

Thai detergent buyers

PLATFORM

Qual-AI by Be Digital

EXECUTIVE SUMMARY



The Loyalty Illusion

90% of buyers claim primary brand use, but 80% are heavy rotators in practice. Stated loyalty is conditional, not exclusive — the “autopilot” claim (85%) is easily overridden by promotions or stock-outs.



Price & Promotions Dominate

83% cite price or promotions as the primary switching trigger. “Buy 1 get 1” is the single strongest driver, mentioned by 25%. Specific discount thresholds (20–30%, 10–50 baht) cluster tightly — real elasticity, not vague price-sensitivity.



Cleaning vs. Fragrance Tension

The category splits mentally: Breeze, Attack, Omo lead on cleaning power; Downy and Hygiene own fragrance. 80% run multi-brand portfolios to bridge the gap — the white space is one product that delivers both.

SECTION A The Loyalty Illusion

KEY FINDINGS

- 90% claim to mostly use one brand, but 80% admit to rotating or switching when conditions are right.
- Among self-described “exclusive loyalists” (18%), many still switch when their brand is out of stock.
- The “autopilot” claim (85%) is largely conditional — overridden by promotions or stock-outs.
- 32% return to their main brand after switching — opportunistic shifts, not durable preference change.
- Stated loyalty often reflects primary preference or habit, not unwavering commitment.
- 7% explicitly stated they intended to buy one brand but switched live in-store at the shelf.

IMPLICATIONS

- ▶ Quantitative loyalty metrics significantly overstate true brand commitment — discount the topline number.
- ▶ Retention investment should focus on availability and promotional parity, not just brand affinity.

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I usually plan to buy Breeze, but if a larger bag has a better promotion, I'll pick the one with the promotion at that time.

— Respondent 9

KEY FINDINGS

- 83% cite price or promotions as the primary reason for switching or considering other brands.
- “Buy 1 get 1” promotions are the single strongest switching trigger, mentioned by 25% of respondents.
- 36% mention specific discount thresholds — 5–30% off, or 10–50 baht price drops.
- Out-of-stock situations push switching for 12% of buyers — a meaningful share lost without a fight.
- 86% of in-store switchers say they would return to their original brand long-term — opportunistic, not durable.

IMPLICATIONS

- ▶ Promotional cadence and depth — not brand love — is the most actionable lever for share gain.
- ▶ The cost of winning a switcher is low; the cost of holding them is high — design for repeat.



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

— Respondent 3

KEY FINDINGS

- The category splits cleanly: Breeze, Attack, and Omo lead on cleaning power (30% prioritize cleaning).
- Downy and Hygiene dominate the fragrance association (30% prioritize long-lasting scent).
- Pao occupies a distinct value/affordability position — sometimes seen as the older homemaker's choice.
- 80% run multi-brand portfolios — using one brand for cleaning, another for scent, often paired with separate softener.
- Many openly acknowledge the trade-off — Downy smells better, Breeze cleans better — and choose by occasion.

IMPLICATIONS

- ▶ The white space is “all-in-one” — decisive cleaning AND long-lasting fragrance in one product.
- ▶ Brand-stretch into the opposite axis (fragrance brand adds cleaning power, vice versa) is high-risk.



Even though I trust Breeze's cleaning the most, I love the fragrance of two other brands almost as much.

— Respondent 9

KEY FINDINGS

- 43% of respondents rate a non-main brand equal or higher on personality and love dimensions.
- The gap is most often blocked by price (28%) or by the main brand's superior cleaning performance (32%).
- Brand personas are clear: Breeze and Attack signal capability and family-orientation.
- Downy and Hygiene signal modernity, softness, and self-care — emotionally aspirational positioning.
- 41% identify with their main brand's persona — but a meaningful minority do not. A fragility window exists.

IMPLICATIONS

- ▶ The 43% latent preference pool is a structural opportunity — particularly for fragrance-first brands.
- ▶ Targeted promotions can convert latent preference into purchase by neutralizing the price barrier.

“

I don't like Attack's scent — too strong. I prefer Hygiene's soft, long-lasting fragrance.

— Respondent 36

KEY FINDINGS

- 29% of respondents cite their mother's brand as a factor in their current choice — a distinct loyalty mechanism.
- For some, inheritance translates to active loyalty driven by emotional connection and trust.
- For others, it's nostalgic — current choices are still ultimately driven by price or performance.
- Inherited loyalty is reinforced by perceived quality, not pure sentiment — performance still has to deliver.
- Pao is sometimes seen as an “older homemaker's brand” — generational positioning, both asset and risk.
- Personal preference — especially for scent — can override inherited loyalty within a generation.

IMPLICATIONS

- ▶ Inherited loyalty is real but conditional — performance drift erodes it within a single generation.
- ▶ Brands with strong inheritance equity can extend it through “family heritage” storytelling.

“

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

— Respondent 3

KEY FINDINGS

- Confidence and satisfaction with main brand dominate — 64% express trust in cleaning or scent performance.
- Regret emerges when a preferred brand is out of stock — small but emotionally charged for affected buyers.
- Curiosity and desire for novelty drive 29% of switching — new scents, new formulas, new packaging.
- 10% explicitly link scent to personal comfort, confidence, and daylong freshness.
- “Modern mother” personas attached to fragrance brands carry strong aspirational emotional weight.
- Confidence in cleaning is anchored to important-occasion outfits — not everyday wear.

IMPLICATIONS

- ▶ Tackle the regret moment with stock-availability commitments and immediate promotional bundling.
- ▶ “Confidence in important moments” is an under-used positioning angle for cleaning brands.

“

Like someone who is warm, who likes fragrance, who feels comfortable when wearing it.

— Respondent 26

 **STRENGTHS**

- Strongest cleaning power equity in the category
- The trusted choice for important-occasion outfits
- “Family-oriented” persona resonates broadly
- Wide availability and consistent in-store presence
- Premium pricing accepted as worth the cost for cleaning

 **BARRIERS**

- Fragrance is functional, not desirable — loses to Downy and Hygiene
- Higher price drives switching at 20–30% promotional thresholds
- Generates latent preference for more “loved” alternatives on personality
- Persona feels less modern than fragrance-first brands like Downy
- Stock-outs trigger immediate competitor adoption

"I always choose Breeze for important outfits because I'm confident stains will come out and the clothes will smell clean all day." — Respondent 9

 **Treat Loyalty as Conditional**

Stated 90% loyalty masks 80% rotation. Build retention strategies around availability and promotional parity, not just brand affinity. Discount the topline number.

 **Compete on Promotional Cadence**

“Buy 1 get 1” triggers 25% switching. Promotional rhythm is the single most actionable lever — match competitor cadence and depth, or lose share at the shelf.

 **Eliminate Stock-Outs**

12% of switching is triggered purely by availability. Stock-out moments hand share to competitors at zero cost — operational excellence is a brand strategy, not just supply chain.

 **Build the All-in-One Solution**

80% run multi-brand portfolios. A single product that delivers both decisive cleaning AND long-lasting fragrance addresses the largest unmet brief in the category.

 **Convert Latent Preference**

43% rate a non-main brand higher on personality. Targeted promotions to this segment unlock the largest available switch pool — neutralize the price barrier to convert.

 **Activate Inheritance Equity**

29% inherit their brand from their mother. “Family heritage” storytelling reinforces emotional loyalty for incumbents — and creates a durable barrier for challengers.