

## CONJOINT ANALYSIS

The following 5 attributes were tested to understand which are key for driving the selection of fabric softener:

- Concentrated or diluted.
- Small or large size.
- Brand name (up to 3 by country).
- Variant (up to 4 by brand).
- Price.

Participants were asked the following question: If you were to buy a fabric softener, which option would you choose?

- Concentrate	- Concentrate	- Dilute	None, I will go home without buying softener
- Small bottle	- Small bottle	- Large bottle	
- Lenor	- Silan	- Lenor	
- Yellow	- Sensitive	- Blue	
- Price: \$2.95	- Price: \$3.95	- Price: \$2.95	

The drivers for the selection of fabric softeners, based on the combinations of the above attributes, are:

1. Brand
2. Price
3. Variant

In conclusion, this means that consumers typically follow their brand choice first, followed then by price, and finally their favourite variant.

## OBSERVATIONAL RESEARCH (QUANTITATIVE)

	<b>Form</b>				
	Form	Avg. dosage /load (ml)	Reco dosage (ml)	Dosage vs. Reco	CCI* Opportunity
<b>The Philippines</b>	Conc.	19	25	74%	+31%
<b>Hungary</b>	Conc.	56	26*	215%	0%
<b>Poland</b>	Conc.	56	35*	160%	0%

(\*) Category Consumption Index

Number indicates the ml of softener that consumers used in the dosage, as well as the recommended dosage. Dosage Vs reco indicates if consumers over or under dosed The Category Consumption Index opportunity shows the volume in case the consumers will match reco dosage.

	Completely softened	Partially softened	Not softened	CCI* Opportunity
<b>The Philippines</b>	69	0	31	+30%*
<b>Hungary</b>	89	6	5	+8%*
<b>Poland</b>	29	64	7	+39%*

(\*) Category Consumption Index

Numbers indicate the percentage of the loads completely softened (with fabric softener in all items), or partially softened (items removed before the softening steps), or not softened at all.

	Underwear	Rest of clothing	Households	Baby Clothes	CCI* Opportunity	
					Underwear	Baby clothes
<b>The Philippines</b>	26%/31%	49%/48%	16%/10%	9%/11%	*5%	+2%
<b>Hungary</b>	42%/87%	36%/1%	23%/8%	0%/4%	*10%	+4%
<b>Poland</b>	41%/80%	35%/3%	23%/12%	1%/5%	10%	4%

(\*) Category Consumption Index

Numbers indicate the percentage of items in the load. Numbers on the left are the weight of those items in the softened load, and the number on the right are the weight of those items in the non-softened load.

Example: Underwear represents 26% of the total items in the softened load in The Philippines, but 31% in the non-softened. Therefore there is an opportunity to increase consumption, quoting a +5% growth.

Category Consumption Index opportunity represents the volume growth potential, in case all the baby clothes were softened, or the underwear. Only those types of clothes are considered relevant opportunities for the category.

## EYE TRACKING (QUALITATIVE)

10 consumers, laundry shoppers in the last 3 months and 5 of them Fabric softener shoppers, were requested to perform a purchase with a portable eye tracking device. After training the shoppers on how to use the tool, the major findings are:

Consumers seem to pay attention to the brand and the price, as oppose to the benefit and the fragrance visual cues of the product.

In addition, some confusion was observed relating to the price tags.

## PERSONAL INTERVIEWS

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The findings shown were a result of personal interviews with 8 consumers, 4 of them regular users of fabric softener and 4 of them trying fabric softener for the first time. Interviews were held at a central location and had a duration of 90 minutes. The topics covered were the following: general comments, cleaning habits, attitudes towards laundry and fabric softeners.

1. Most of the consumers claimed to dose the concentrated fabric softener through the cap.  
Many of them did so the first time they tried the product, following the instructions (“it’s a new product, I needed help to know what to do”). Many of them claimed to use the cap to help regulate the dosage.
2. Housewives adjusted the dosage to achieve the scent profile they wanted. Those who started pouring a full cap, or by eye, claimed to immediately reduce dosage to meet their needs (to 1/2 or 1/3 of a cap). In particular, for the family’s outdoor clothes or for the husband’s clothes, they mentioned that they used an even smaller dosage.