

LEAN  DATA

JUST POWER GARI CUSTOMER INSIGHTS

JANUARY 2019



WELCOME TO YOUR LEAN DATA RESULTS

1

Headlines

- + What stood out to us & top actionable insights

2

Customer Acquisition

- + How customers heard about Power Gari & why they purchased

3

Customer Experience & Impact

- + Customers' experience with Power Gari & changes in their lives

4

Competition, Retention & Feedback

- + Power Gari compared to alternatives, future plans to purchase & suggestions

5

Customer Poverty Profile

- + Measuring Power Gari customers' relative poverty through the EquityTool

Funded by:

BILL & MELINDA
GATES *foundation*

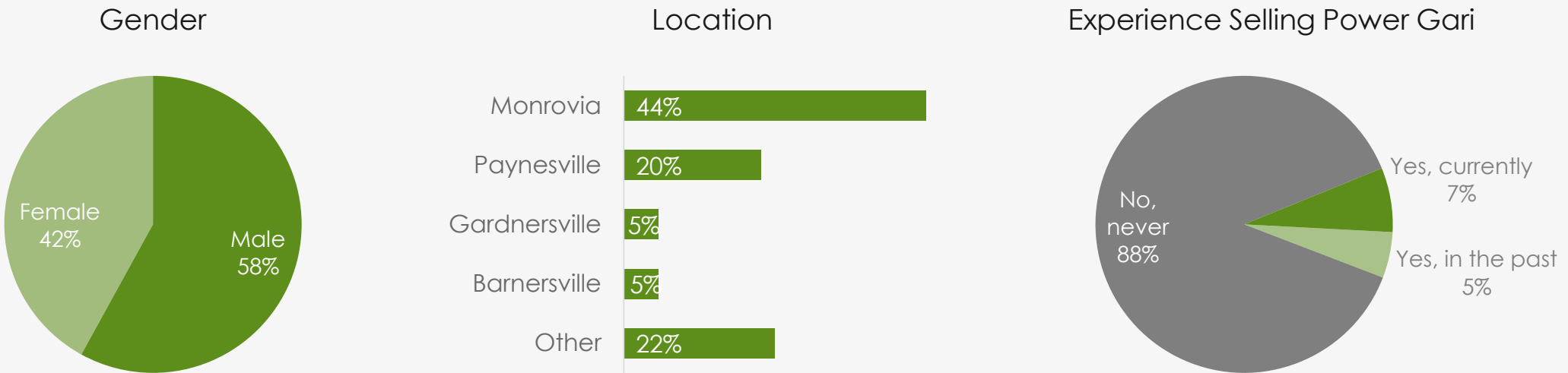
Delivered by:

LEAN DATA

DATA COLLECTION DETAILS

HEARING FROM POWER GARI CUSTOMERS

OBJECTIVE	To speak to customers who have purchased Power Gari at least once to understand how they heard about Power Gari and their motivations for purchasing, how they feel about available alternatives, what their household's experience is like consuming Power Gari, the impact that the product has had on their lives, and their suggestions for improvement.
METHODOLOGY	Four Lean Data researchers based in Liberia conducted phone surveys with customers over 15 days spanning September to December 2018.
RESPONSE RATES	The response rate was 57%, which is good for phone surveys. On average it took 20 minutes to complete the survey.
RESPONDENT DETAILS	We heard from 206 customers. Key sample characteristics are below.





Headlines

"The quality of Power Gari is higher than most other porridge."

TOP INSIGHTS THAT STOOD OUT TO US

RELEVANT INSIGHTS

MORE ON

1 Vitamins & nutrients are key motivator in customers' purchase

- 31% of customers were motivated to buy Power Gari due to vitamins & proteins
- Power Gari's nutritional value is the main reason promoters would recommend it
- 66% said nutrition & vitamins is the most important factor when buying porridge

Slides [8](#), [11](#), [12](#)

2 Power Gari meals are enjoyed by customers' full households

- 63% of customers said their whole household is the primary consumer of Power Gari
- 77% say that three or more people typically eat when they cook Power Gari
- 24% of those who plan to buy more in the future cite that their whole family likes it

Slides [13](#), [14](#), [20](#)

3 Customers report health improvements due to Power Gari

- 56% who report improved quality of life said they feel healthier & have more energy
- Increased strength & less stomach issues were other top improvements experienced
- 24% of those who plan to buy more Power Gari in the future cite health benefits

Slides [15](#), [20](#)

4 Lack of access to or familiarity with Power Gari is main challenge to growing customer base

- 96% of those who reported challenges said they cannot find Power Gari in the market or the sellers did not return to their community
- Improving product distribution was a top suggestion for improvement
- Lack of product knowledge was the top reason detractors would be less likely to recommend Power Gari to others

Slides [12](#), [17](#), [21](#)

TOP INSIGHTS THAT WE FOUND ACTIONABLE

IDEAS FOR ACTION



Target experienced porridge buyers to increase repeat purchase & impact



Improve & expand distribution channels to boost market supply



Adjust ingredients to improve taste to satisfy customers' appetites



Leverage local branding and diversify marketing channels

CONTEXT

- 40% of prior porridge buyers said their quality of life improved since buying Power Gari, compared to 25% who were not buying porridge before
- 37% of prior porridge buy Power Gari with some frequency, compared to 23% of non-porridge buyers
- Net Promoter Score for JUST by previous porridge buyers is 42 while that of non-porridge buyers is -4%.

- 96% of those who reported challenges said they cannot find Power Gari in the market or the sellers did not return to their community
- 62% of customers we spoke to have only purchased Power Gari once
- 56% of one-time purchasers have had trouble buying it because they have not seen the sellers or cannot find it in the market

- 20% of customers who offered suggestions for improvement suggested modifying the ingredients – such as salt, sugar, and milk quantities – to improve the taste
- Among detractors, a top reason they would not recommend Power Gari was the taste

- While most first heard about Power Gari from a seller, an acquaintance, or in the market, only 3% said they heard about it through mass media channels like the radio
- 15% of customers said they were motivated to purchase Power Gari because they were excited that it was a Liberian product and was well packaged
- Is Power Gari's strongest marketing channel a face-to-face sales pitch or word-of-mouth recommendation, or are there other channels that should be tapped into?

MORE ON

Slides [9](#), [11](#), [15](#)

Slides [11](#), [17](#)

Slides [12](#), [21](#)

Slides [8](#), [21](#)

2 Customer Acquisition

"I was encouraged by the [sales] team to taste it [Power Gari]. After tasting it, I fell in love with it."

AWARENESS AND MOTIVATION FOR PURCHASE

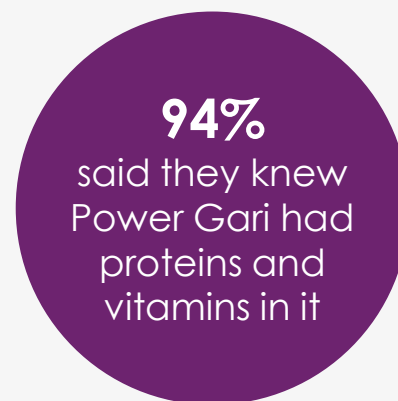
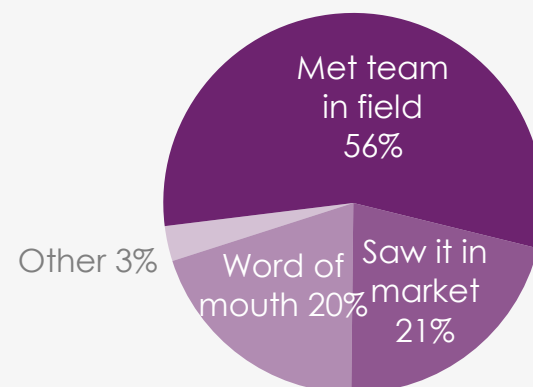
56% HEARD ABOUT POWER GARI FROM THE TEAM IN THE FIELD

We asked customers how they first found out about Power Gari and what motivated them to buy the porridge to understand Power Gari's strongest avenues of customer acquisition.

While sales agents were the primary source, word of mouth and point of purchase were tied in second place. A greater share of women heard about Power Gari through word of mouth, while a larger proportion of men saw it in the market or met the team in the field.

Top drivers of purchase were the high nutrition content of Power Gari, specifically, vitamins and proteins, and the persuasive sales team.

Q: How did you first hear about Power Gari? (n=206)



Q: What motivated you to buy Power Gari? (n=206)

31% Ingredients: proteins & vitamins

"The ingredients are good for children, from what I read on the pack. That's what encouraged me."

25% Persuasion from the sales team

"I was mostly encouraged to buy the product from the way the lady that was selling talked about it."

18% Curiosity to taste

"I saw people selling it in Redlight and from the look, I bought it to know how it tastes."

17% Great taste

"From what I tasted, I was encouraged to buy it. Especially the coconut flavor that I tasted."

17% Recommendation from friends

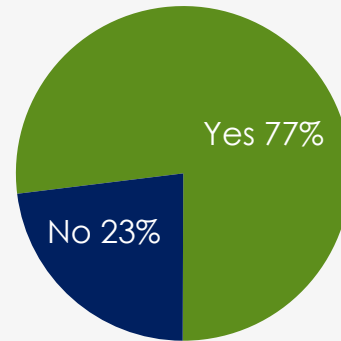
"I was encouraged by friends who have bought it before that it tastes good and contains some vitamins and proteins as well."

PORRIDGE PURCHASES BEFORE POWER GARI

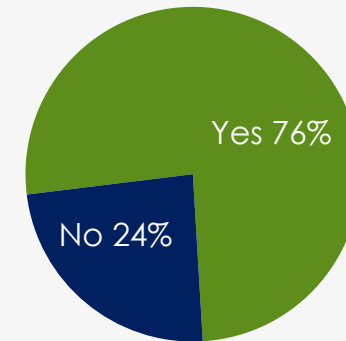
77% HAD BOUGHT PORRIDGE BEFORE PURCHASING POWER GARI

Three-quarters continue to buy another type of porridge in addition to Power Gari, making Power Gari a complement not a replacement of other options.

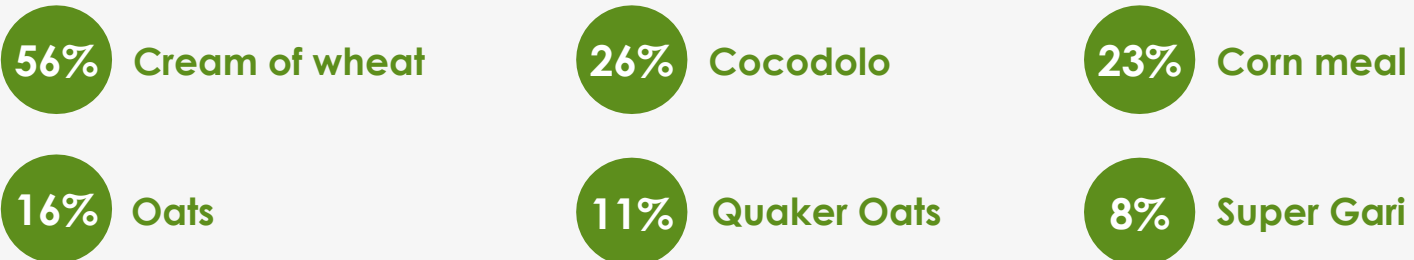
Q: Before you started buying Power Gari, were you buying porridge at all? (n=206)



Q: Are you still buying this type of porridge in addition to Power Gari? (n=157)



Q: What type of porridge was this? (n=158)



Customer Experience & Impact

“Power Gari is only available when the sale agents visit our market, otherwise you can't find it anywhere. They should have retailers who they could supply to regularly in each market.”

PURCHASING BEHAVIOR & PERCEPTIONS

62% HAVE ONLY BOUGHT POWER GARI ONCE

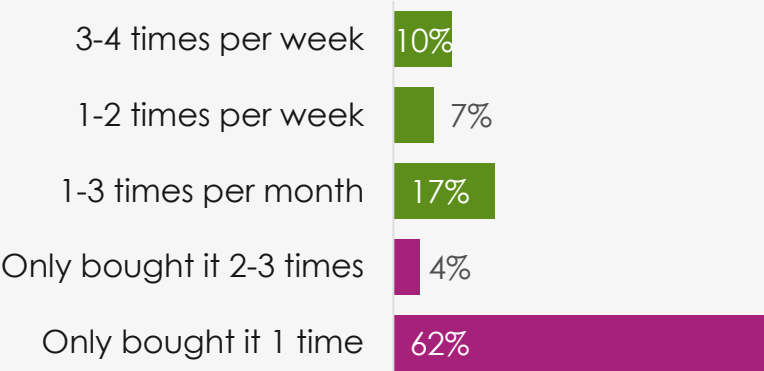
One-third of customers we spoke to buy Power Gari with some frequency, but the majority (62%) have only bought it once.

Those who had bought porridge previously were more likely to buy Power Gari with some frequency compared to those who were not buying porridge before.

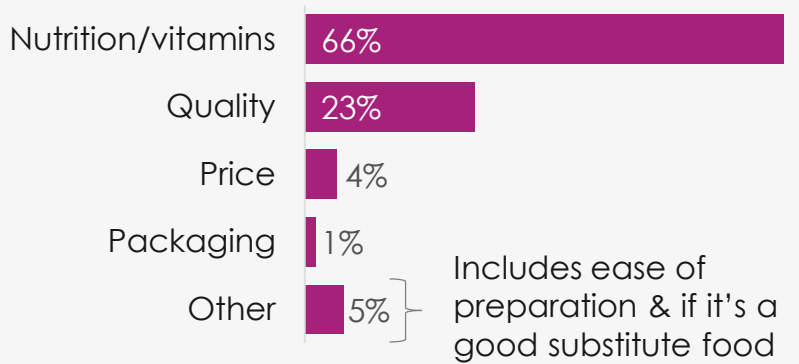
Nutritional content is the most important factor when customers decide what porridge to buy.

Customers feel confident that Power Gari's nutritional value will lead to health benefits, as 72% strongly agree that it will help their children's strength and energy levels.

Q: How often do you buy Power Gari? (n=206)



Q: What one factor is most important to you when buying porridge? (n=206)



Q: To what extent do you agree with the following statements? (n=206)



Strongly agree Somewhat agree Somewhat disagree Strongly disagree Don't know

NET PROMOTER SCORE

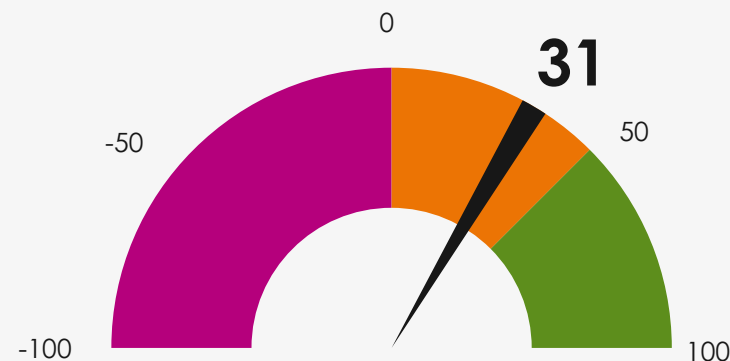
UNDERSTANDING VALUE DRIVERS & PAIN POINTS

The NPS is a gauge of customer satisfaction. It asks the question, "On a scale of 0-10, how likely are you to recommend Power Gari to a friend or family member?"

Scores above 50 are excellent, a negative score is considered poor. Apple, Amazon, and Netflix have net promoter scores of 66, 66 and 64 respectively.

Based on responses from 206 workers, JUST's NPS is 31, which is fair. Promoters value its fortification and that it is a locally-made product. Passives and detractors recommended a change in product ingredients, that is, more milk, less sugar.

It is interesting to note that NPS for customers who were previously buying porridge is 42. Those with no prior experience, although a small sample of 48, had an NPS of -4.



NET PROMOTER SCORE (NPS)

$$\text{NPS} = \% \text{ promoters} - \% \text{ detractors}$$

We also ask respondents to explain their score, yielding insights on value proposition:

PROMOTERS: 48%

9-10 likely to recommend

PASSIVES: 36%

7-8 likely to recommend

DETRACTORS: 17%

0-6 likely to recommend

IN CUSTOMERS' OWN WORDS

PROMOTERS
(n=98)

54%

Food fortification

"Power gari is well prepared with good vitamin and protein."

12%

Locally-manufactured product

"It is a pride for Liberians to produce such a produce made of cassava with lots of protein and vitamin."

PASSIVES
(n=74)

39%

Great taste

"Power Gari is good and does not taste like the other gari, which when you buy, you will buy sugar or milk again."

36%

Food fortification

"I will tell people about the nutrients it contains, and how it can help give strength and energy to children."

DETRACTORS
(n=34)

35%

Limited knowledge of product

"Gari is not bad but for now, I still need to know a little more about the product before recommendation."

15%

Improve the taste

"Needs to be improved with more milk."

POWER GARI HOUSEHOLD CONSUMERS

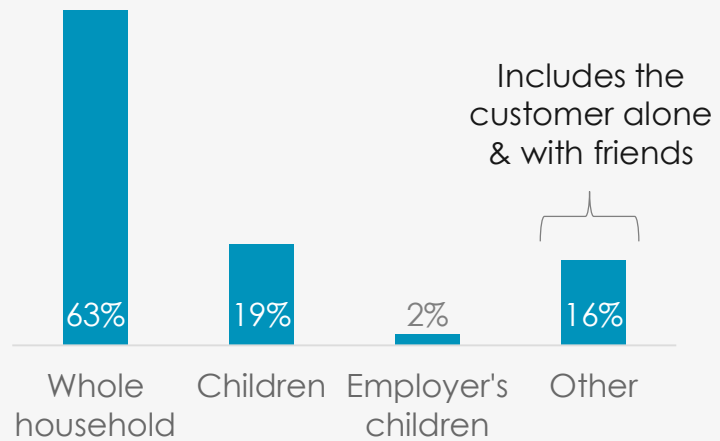
63% SAY THEIR WHOLE HOUSEHOLD EATS POWER GARI

We asked customers who eats Power Gari in their household and the ages of the children who eat Power Gari to understand how Power Gari is being consumed in the household.

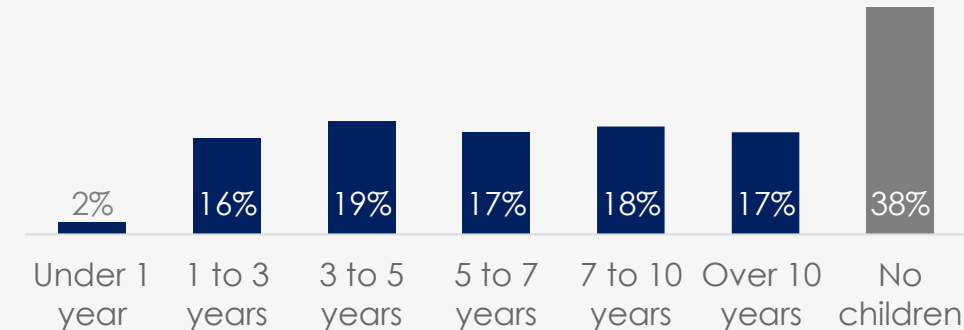
In 62% of households, children consumed Power Gari, but households without children also consumed Power Gari. In fact, 63% of the household reported the whole household as the primary consumer of Power Gari.

The ages of the children who consumed Power Gari range from under 1 year to over 10 years old, with no particular concentration in a specific age range.

Q: In your household, who is the primary consumer of Power Gari? (n=206)



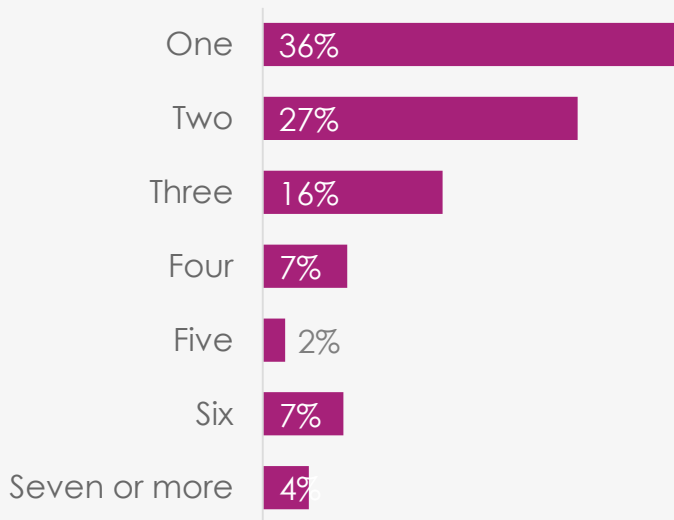
Q: How old are the children who eat Power Gari? (n=206)



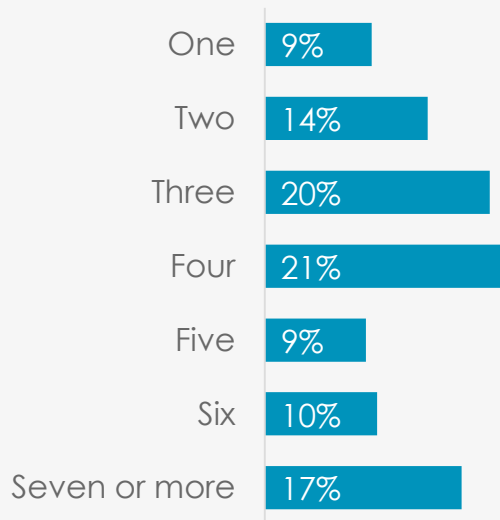
HOW HOUSEHOLDS CONSUME POWER GARI

63% OF CUSTOMERS GET 1 TO 2 MEALS FROM A SINGLE BAG OF POWER GARI

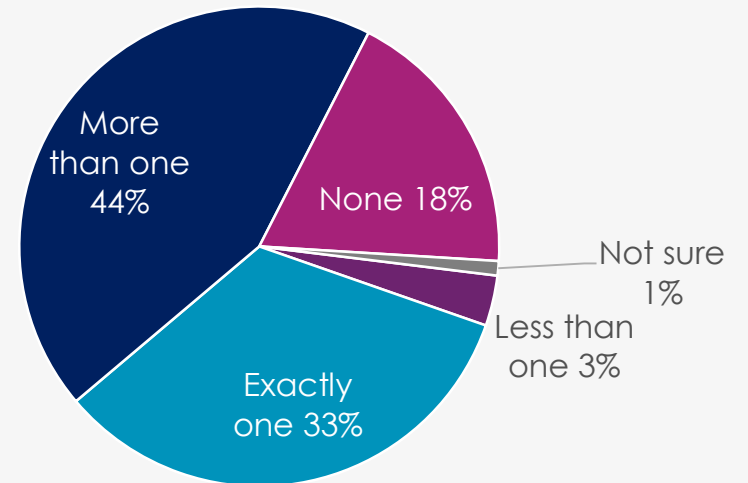
Q: How many times do you cook a single bag of Power Gari until it finishes?
(n=205)



Q: How many people in your household usually eat when you cook Power Gari?
(n=205)



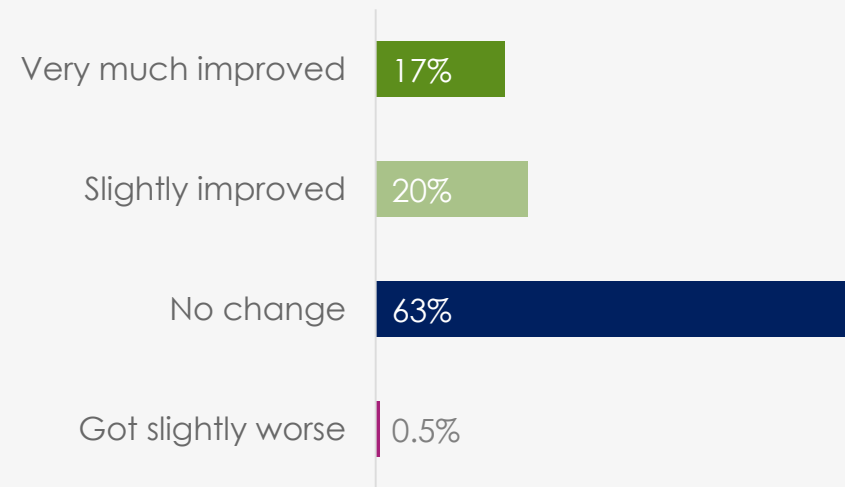
Q: Did your household eat more, less or exactly one bag of Power Gari in the last week? (n=206)



CHANGES IN QUALITY OF LIFE

37% FEEL THEIR QUALITY OF LIFE HAS IMPROVED

Q: How has your quality of life changed since buying Power Gari? (n=206)



We compared quality of life changes to porridge purchase history. We found that those who had bought porridge before were more likely to experience improvements in their quality of life.

40% of those who had bought porridge before said their quality of life had improved compared to 25% of those who were not buying porridge before Power Gari.

Q. How has it improved? (n=75)



IMPROVED

"It makes my son healthy and active."

"It increase my muscles and body size."

"Stomach running experience is not experienced again as before when I ate the ordinary gari."

Q. Why has it not changed? (n=130)



NO CHANGE

"It is not frequently seen in the market so I don't always eat it."

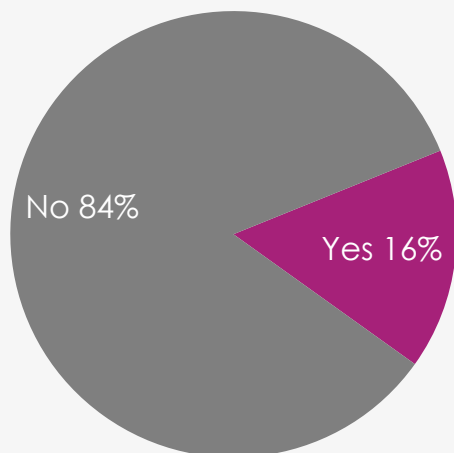
"I only ate this food once, so I can't tell you if the quality of my life has changed."

"No, I have not experienced anything yet since I starting eating this gari."

CHANGES IN HOUSEHOLD FOOD PURCHASES OTHER THAN POWER GARI

FEW REPORT CHANGES IN FOOD BOUGHT FOR THEIR HOUSEHOLD

Q: Other than Power Gari, have you made any changes in the type of food that you buy in your household? (n=206)



TOP CHANGES MENTIONED (n=33)

36% Buy less / don't buy **cream of wheat**

"When I use to buy the Power Gari, I stop buying the cream of wheat."

21% Buy **vegetables** if can't buy Power Gari

"We buy eddoess, yam, fufu when Power Gari is not available."

12% Buy less / don't buy **oats**

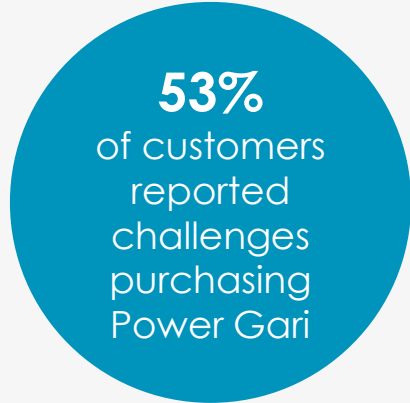
"I stop buying oats."

9% Buy less / don't buy **cocodolo**

"I have reduce the buying of rice and cocodolo."

CHALLENGES EXPERIENCED

96% OF CHALLENGES DUE TO ISSUES ACCESSING POWER GARI



TOP CHALLENGES REPORTED (n=109)

96% **Can't find in market / seller has not returned**

"I have been searching for it since I ate it but can't find it in any market."

"I only saw the seller once and since then, I have not come across any of the sellers again."

4% **High prices**

"The price is a bit high."

"Sometimes I go to town or Redlight but still can't find it. Some people increased the price."

2% **Seller out of stock**

"I phoned them once when I wanted some but was told that the production was done in Nimba and they had some shortage."

"I have been trying to buy Power Gari since the first time I tasted it but can't find it. The sales agent said that they don't have stock."

2% **Other reasons**

"I will buy a lot more for my kids to eat when they get out of school."

"The challenge has to do with the quality."

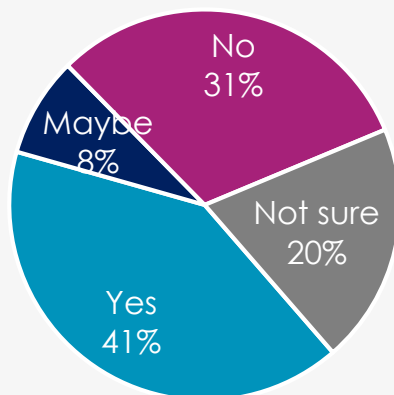
4 Competition, Retention & Feedback

"I know the value of Power Gari now so I want to make it my family's regular breakfast."

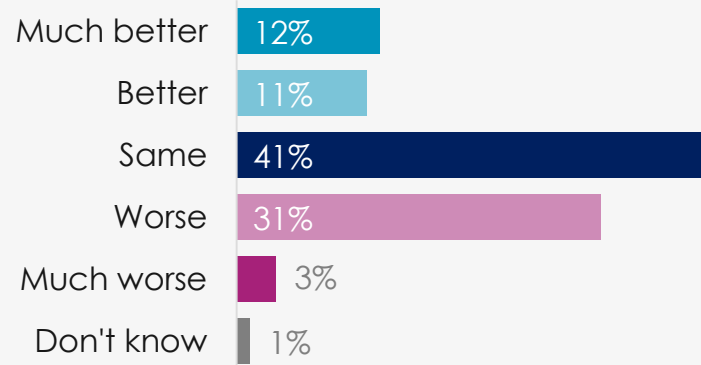
ACCESS TO ALTERNATIVES

49% CAN FIND SUBSTITUTE, 34% SAY SUBSTITUTE IS WORSE THAN POWER GARI

Q: Could you easily find a good substitute to Power Gari? (n=206)



Q: Is the substitute better, worse or same as Power Gari? (n=90)



56%
who said they buy
Power Gari weekly
said "yes" they
could easily find a
good alternative
to Power Gari

TOP ALTERNATIVES MENTIONED (n=90)

39% Cream of wheat

18% Cocodolo

16% Corn meal

13% Quaker oats

13% Regular gari

11% Vegetable products

FUTURE PURCHASES OF POWER GARI

86% PLAN TO PURCHASE MORE POWER GARI IN THE FUTURE

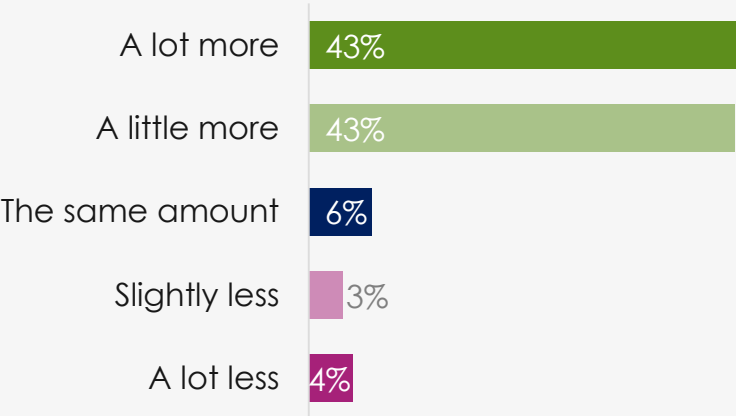
To understand customers' interest in Power Gari in the future, we looked at a few sub-segments of customers.

30% of those who have only bought Power Gari once plan to buy "a lot more" in the future, and 55% plan to buy "a little more."

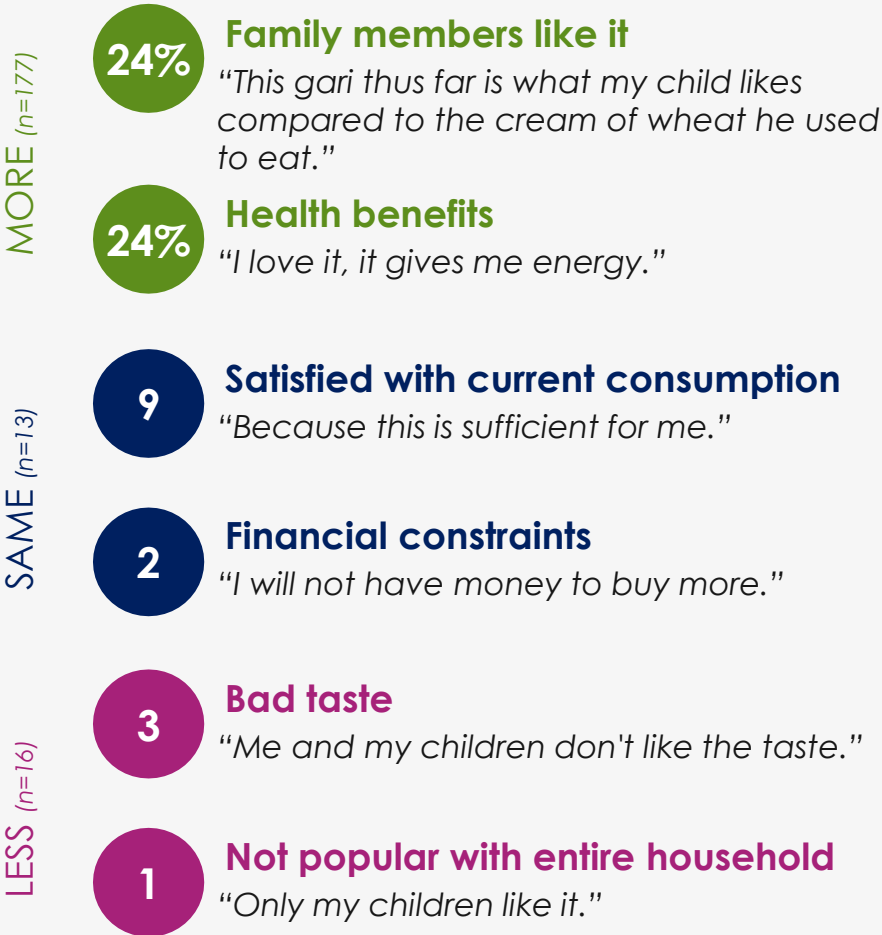
64% of those who say that they buy Power Gari once per week say they plan to buy "a lot more" in the future.

67% of promoters plan to buy "a lot more" Power Gari in the future, while 65% of passives plan to buy "a little more."

Q: In the future, will you buy less, the same amount or more Power Gari? (n=206)



TOP REASONS FOR FUTURE PURCHASE PLANS (n=206)



SUGGESTIONS TO IMPROVE POWER GARI

STRENGTHEN DISTRIBUTION NETWORKS, REDUCE PRICES, MODIFY CONTENTS



TOP SUGGESTIONS FOR IMPROVEMENT (n=107)

51% Improve product distribution

"Make the product accessible, like supplying to supermarkets and local businesses. Do more jingles and advertisements."

20% Modify Power Gari ingredients

"They should reduce the salt because people complained about it being salty when I use to sell it."

13% Reduce price

"Give a location where Power Gari can be easily found, and also reduce the price to 125."

8% Increase package volume

"The quantity in the bag is small, so they should think of increasing it or having different sizes."

7% Ensure Power Gari remains available

"I hope they don't come to fool us after we have got use to the product and they cut it off. I want this business to continue please."

6% Boost marketing

"They should have sub stations in each market and announce the locations of those stations on radio for the public to know."

ADDITIONAL FEEDBACK

APPEALS TO CONTINUE MANUFACTURING POWER GARI

At the end of each phone call, we asked customers if there was anything else that they would like to share.

17%
provided
unsolicited
feedback

ADDITIONAL SUGGESTIONS (n=34)

1 Improve product distribution

"They should establish point of sales to make the product accessible."

"I would like for the Power Gari to be supplied in my community."

2 Modify Power Gari ingredients

"Reduce the glucose in the palm oil flavor."

"They should add sugar and they should produce the peanut flavor."

3 Boost marketing

"Need to augment the advertisement and expand the branch in other communities ."

"The business advertisement was bad...the sellers can explain to people the importance of the products and how it is good for children."

ADDITIONAL APPRECIATION (n=9)

1 Continue producing Power Gari

"I just want to encourage your team to increase their production."

2 Great product

"Thanks to the producer of Power Gari, I really enjoyed it."

3 Opportunity to participate in survey

"Thanks for doing follow-up on your product. I hope it improves because you are doing a great job."

5 Customer Poverty Profile

"[Power Gari] has improved my kids health and cut down cost of buying other things for the kids."

CUSTOMERS' RELATIVE POVERTY THROUGH THE EQUITYTOOL

CUSTOMERS WE SPOKE TO ARE WEALTHIER THAN THE GENERAL POPULATION

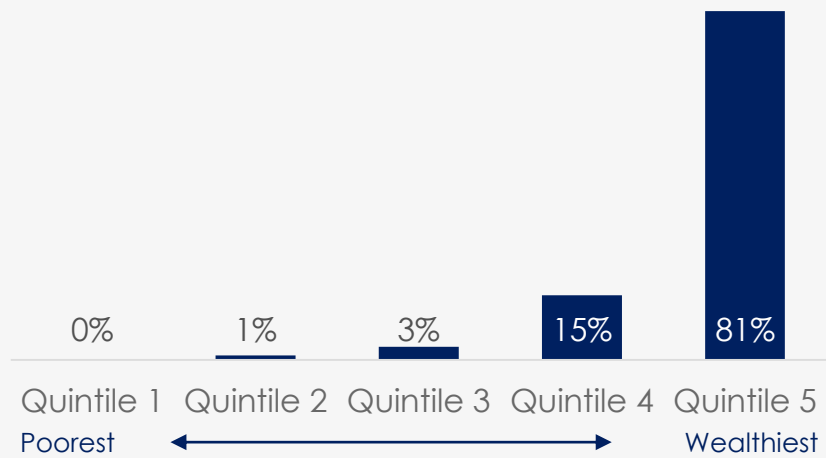
The EquityTool measures relative wealth to understand which wealth quintiles customers fall under and how they compare to their country's population.

The national or urban population is equally split into five quintiles, with 20% of the population in each quintile. Quintile 1 is the poorest and quintile 5 is the wealthiest.

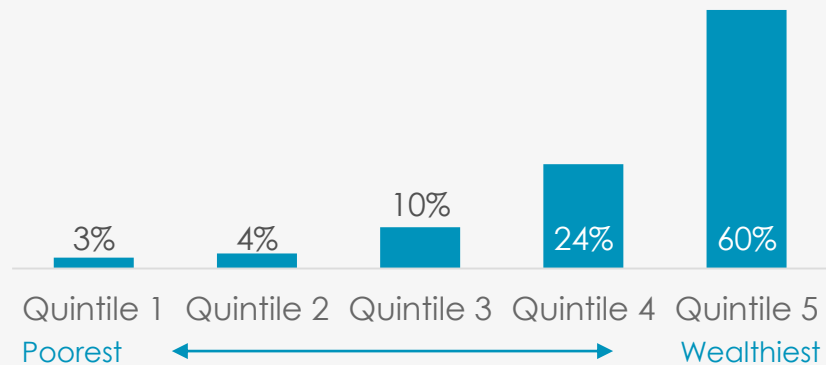
While JUST's results indicate that 81% of respondents were in the wealthiest quintile of the national population, Liberia's economy is one of the poorest in the region and internationally.

In a 2017 World Bank ranking of countries' gross domestic product based on purchasing power parity, Liberia ranked 163 out of 188.*

NATIONAL QUINTILE RESULTS (n=198)



URBAN QUINTILE RESULTS (n=198)



WORLD BANK: GROSS DOMESTIC PRODUCT RANKING BASED ON PURCHASING POWER PARITY* (2017)

#22: Nigeria	#112: Mali	#141: Niger	#163: Liberia
#77: Ghana	#120: Burkina Faso	#148: Mauritania	#164: Cape Verde
#84: Côte d'Ivoire	#128: Guinea	#149: Togo	#165: The Gambia
#110: Senegal	#136: Benin	#153: Sierra Leone	#168: Guinea-Bissau

*Source: <https://datacatalog.worldbank.org/dataset/gdp-ranking-ppp-based>

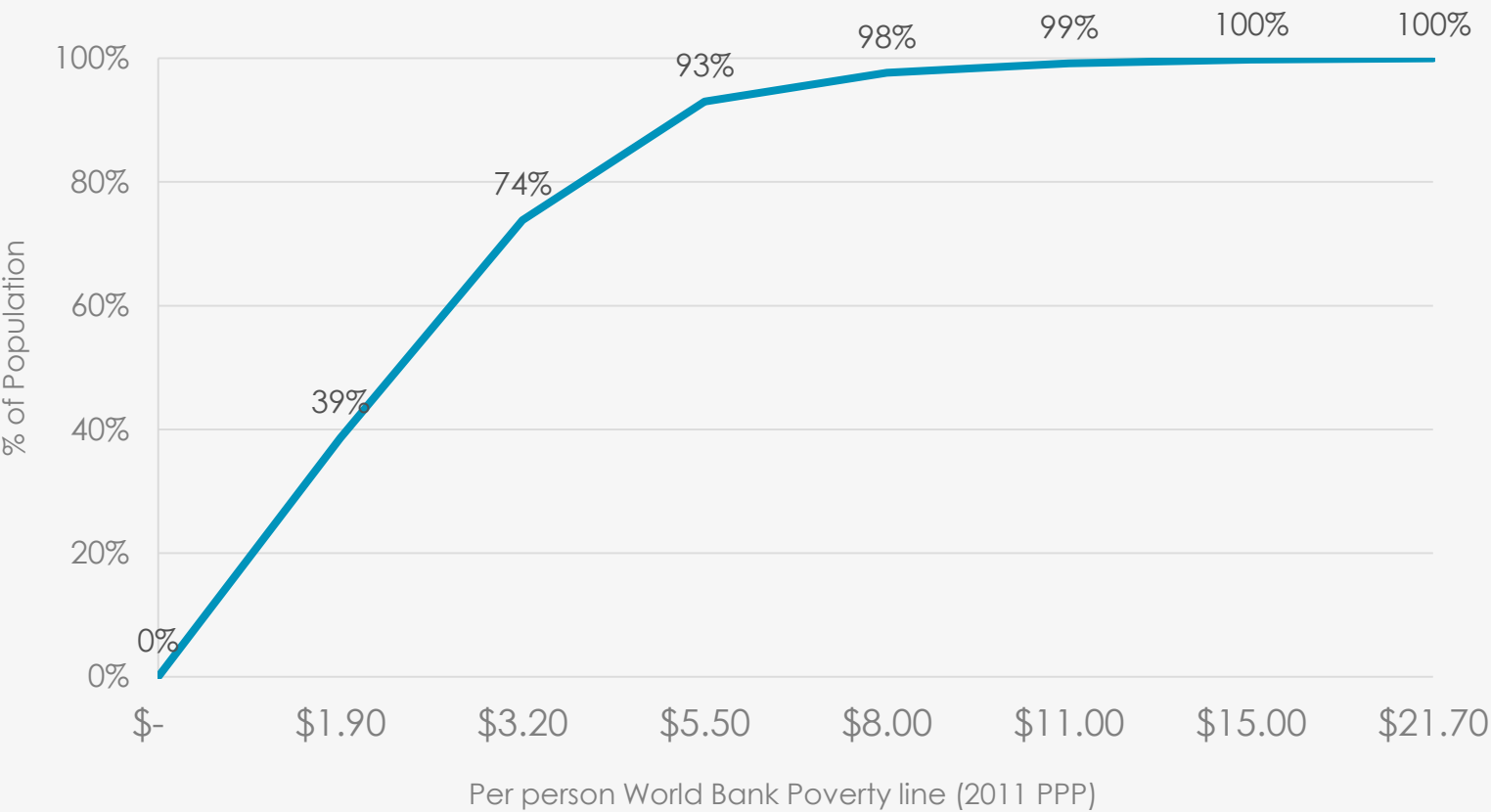
LIBERIA'S POVERTY HEADCOUNT RATIO FROM THE WORLD BANK

PERCENTAGE OF POPULATION LIVING BELOW WORLD BANK POVERTY LINES

The Lean Data team typically measures the poverty profile of a company's stakeholders through the Poverty Probability Index (PPI). The PPI uses internationally recognized poverty lines established by the World Bank to predict the poverty levels of survey respondents.

There is no PPI tool currently available for Liberia so we were not able to apply this to JUST's customers. Nevertheless, understanding the percentage of Liberia's population that lives below different poverty lines provides critical context to understand the relative poverty of JUST's customers.

LIBERIA: SHARE OF POPULATION LIVING BELOW WORLD BANK POVERTY LINES *(2014 data)*



QUESTIONS?

Tori Klein
tklein@acumen.org

Lornah Gacheri
lgacheri@acumen.org

Venu Aggarwal
vaggarwal@acumen.org

Delivered by:

LEAN DATA

Funded by:

BILL & MELINDA
GATES *foundation*