

Unifying®
Opportunities

Folia Water Endline Survey

Supplementary Assessment Findings

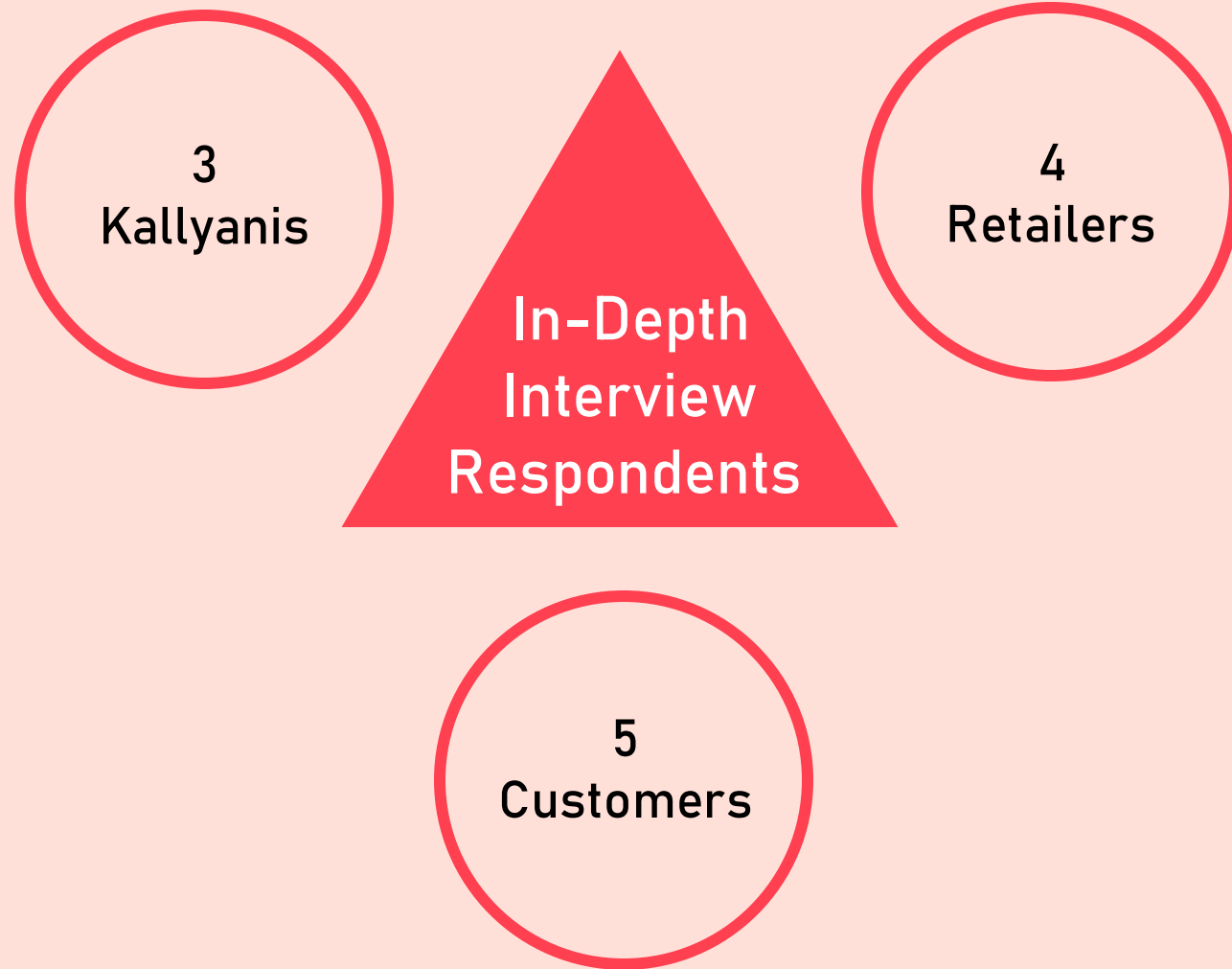
Jessore, Bangladesh | Jan 2021



iSocial®

These are the findings of a short assessment to supplement the
Endline Survey of the Folia Water field pilot with iSocial.





Positive Features of Folia Water

RETAILERS

- Folia filtered water is hygienic.

CUSTOMERS

- Water tastes lighter and cleaner.
- Kids like Folia Water.
- Diarrhea and other waterborne illnesses are reduced.
- Water tastes better.

KALLYANIS

- Folia filtered water is hygienic.
- Gets rid of iron.
- Purifies water.
- Helps with gas and other stomach problems.
- Impurities are visible on paper, serving as a visible indicator of effectiveness.



Negative Features of Folia Water

RETAILERS

- Setup topples easily.
- Litres purified per paper is too low.
- Impurities stuck on paper can be unsightly.
- Papers spoil easily.

CUSTOMERS

- Water gets too cold in Winter due to slow flow.
- Purifying 2 Liter bottles at a time is unsuitable for household use. More volume needed.
- Pots are not secure and topple. Not opportune with kids in the house.
- Papers need to be changed frequently.

KALLYANIS

- Setup topples over easily.
- Elderly and young cannot use the setup due to weight.
- Need to wait for bottom pot to be full before drinking.
- Two people needed to unload midway and drink water.
- Paper runs out in a day or two.
- Paper replacement is expensive over time.





Why Do Customers Buy Folia?



BETTER
TASTING
WATER

GOOD FOR
HEALTH

HABIT

FOR THE KIDS

HABIT

MARKETING
CAMPAIGNS

ATTRACTIVE
PRODUCT



Why Don't Customers Buy Folia?



THINK
TUBEWELL
WATER IS SAFE
ENOUGH

TEDIOUSNESS
OF USE

LACK OF
HABIT

NOT
INTERESTED
IN PAYING
FOR FOLIA

COMPETITORS
SUCH AS
JERIN WATER

FOLIA PAPER
NOT WIDELY
AVAILABLE

LACK OF
AWARENESS



Returning Customers

What causes customers to quit, continue, and linger?

Retailers	Customers	Kallyanis
Few Returning Customers.	Not Applicable	Some Returning Customers.
Campaigning revives sales (mostly one-time sales)		
Interim financial problems can explain start-stop		
Folia Water isn't seen as obligatory, hence usage is not regular		
Less demand during winter (seasonality) could explain some start-stop behaviour		
Some customers are simply start-stopping due to push sales by Kallyanis and retailers		



How to Increase Sales?

**Door to Door
Sales**

**More
Aggressive
Marketingg
Including
Online
Marketing**

**Provide
filtering
bottle with
filter and
paper**

**Parent-
Targeted
BCC
Campaign**

**Broader
Variety of
Gifts**

**Tagging KL
customers
directly to
retailer
stores**

**Stand & Tap
System**



How to Improve the Product?

**Make water
Dispensable
During
Filtration**

**Secure
Feeder Bottle
to Funnel**

**Utilize a
Stand to
Solve
Toppling
Problem**

**Increase Per
Paper
Capacity**

**Add
Expiration
Date to
Papers**

**Increase
Shelf-Life of
Paper**

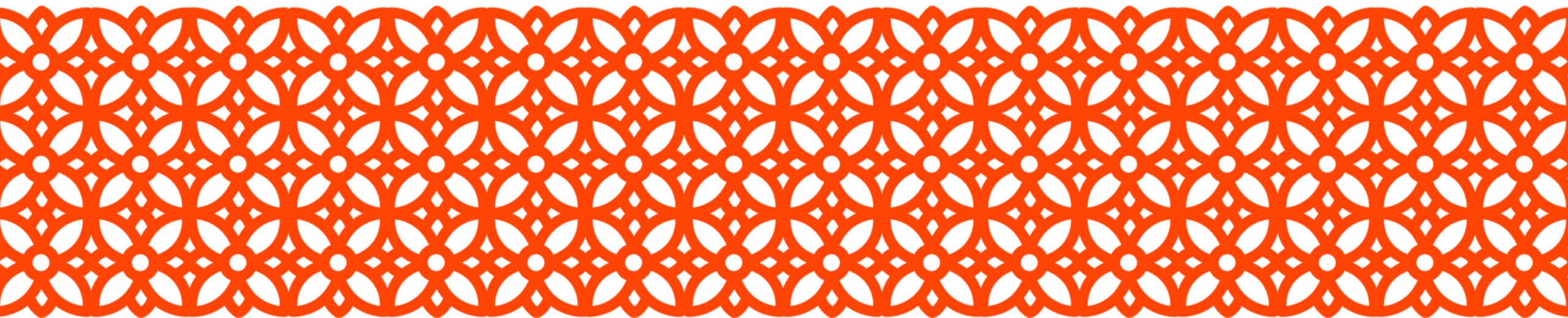
**Add Indicator
for When
Paper Should
be Replaced**



TAKEAWAYS & RECOMMENDATIONS

- The success of competitors proves there is a BoP market for water purification products.
- Price is less of a sticking point than capacity of each paper and frequency of replacement. Higher capacity papers should be developed.
- Some inconveniences in product use have been identified. Minimum viable convenience is probably somewhere between securing bottle to top of filter and providing a bottom bottle/stand with a tap.
- Price appears competitive. Focus should be given to marketing & BCC campaigns.
- Retailers unwilling to push new products. So demand creation needs to precede retail drive.
- Finding recurring customers will be difficult for retailers. Kallyanis/BPs can play a role here.





Thank You!

FOR MORE INFORMATION
www.iSocial.Com.BD
+8809606-003696

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