



What did we learn from listening to 4,800+ customers in Omidyar Network's Education portfolio?

In July 2018, 24 Omidyar Network education investees took part in a 12-week Lean Data "Sprint" to collect customer feedback and impact data across our global portfolio.

The Lean Data team listened to more than **4,800 customers in 14 countries** through phone interviews and online surveys.

Here we share some of the things we learned.

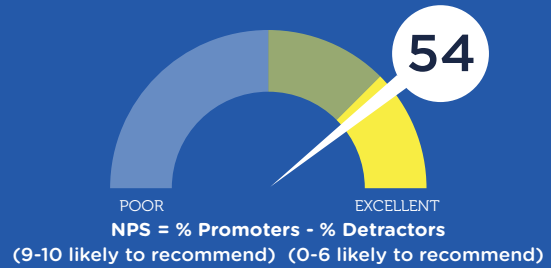
Our investees' average Net Promoter Score is high - but varied across investees.

Investees' average NPS score is 54, but scores range from 8 to 95.

Promoters praised quality and learning at high-NPS companies.

Detractors were dissatisfied with content and delivery at low-NPS companies.

The NPS is a widely used measure of customer loyalty; it asks "On a scale of 0-10, how likely are you to recommend X to a family or friend?" A NPS score of above 50 is considered excellent.



3 in 4 people say their quality of life improved because of the investee.

43% say their quality of life "very much improved".

"New & improved skills" & "academic performance" were the top mentioned outcomes, but there were differences across business models.

Type

Top Outcomes

School Models

Improved Academic Performance

Skilling Programs

New & Improved Skills; Career Opportunities

Ed Tech

More Access to / More Effective Delivery of Quality Education Content

Early Childhood Education

Improved Literacy / Numeracy Skills; Increased Confidence



42% OF PAYING CUSTOMERS RATED THE INVESTEE AS "VERY GOOD" VALUE FOR MONEY

An additional 29% rated it "good" value for money.

Even though **58%*** of surveyed customers live on less than \$8 / day, they are saying they are getting good value. This tells us that despite income constraints, customers see education as a valuable use of limited funds.



63% COULD NOT EASILY FIND ALTERNATIVES, DEMONSTRATING THAT ENTREPRENEURS ARE OFTEN MARKET PIONEERS

This dimension of impact – whether a company is providing a scarce product or service – is often overlooked.

For those customers who said that they could easily find alternatives, **56%** said the investee was "better" than alternatives.

*Emerging markets only, 2011 Purchasing Power Parity (PPP). PPPs measure the total amount of goods and services that a single unit of a country's currency can buy in another country. This equalizes the purchasing power of currencies allowing for cross-country comparison

While there was wide variation in overall impact performance, seven of the 24 companies scored above average across the majority of the core impact metrics.

The remaining 17 companies' scores were mixed: some scored above average on 3-4 impact metrics, while others scored below average for all metrics. This underlines the value of collecting **customer-level impact data** to identify what's working and where companies can improve.



From open ended feedback, we were able to spot trends in value drivers and areas for improvement.

Individual organizations received actionable feedback on what customers valued most, and potential areas for improvement to increase reach and impact. Aggregating this data enables us to observe trends across the portfolio based on business model.

Top Value Drivers

Top Suggestions For Improvement

School Models

[Quality of Education Outcomes
Teaching Method / Delivery of Content]

[Improved Facilities
More / Better Teachers
Communication Between School & Parents]

Skilling Programs

[Content Quality
Teaching]

[Curriculum & Variety
Improve Delivery (e.g. Timing, Methods, Resources)]

Ed Tech

[Delivery of Content
Quality of Education Outcomes]

[Depth & Variety of Content
UX]

Early Childhood Education

[Quality of Content
Quality of Education Outcomes]

[Wider Choice of Content
Delivery of Content]

And finally, there's no substitute for hearing directly from the people our investees are serving. **Here are a few customer quotes...**

Impact of Technology

"Sometimes it happens that I am unable to solve an easy question. I feel shy asking the teacher such questions. But I can ask the Doubtnut app anything. Concepts that are not very clear to me become clear when I use the app."
- Student, Doubtnut, India

Hearing the Unexpected

Q: If you had to describe Spark Schools in one word what would it be?
A: "Amazeballs"
- Parent, Spark Schools, South Africa

Importance of Exposure

"...because of ALU I have been exposed to things I didn't know I wanted for my future...now that I know them, I have a vision of a life that I want to live..."
- Student, African Leadership University, Mauritius

An Online Course in a Time of Need

"eduK came into my life at a time when I was depressed. I had just lost my baby. During the pregnancy I took the eduK shoes courses for her and made a beautiful collection... I also learned to make boxes and I made the motherhood souvenirs. eduK came into my life and opened my horizon. Thank you eduK for making a difference in my life!!"
- Student, eduK, Brazil



Education & Confidence

"When I joined Anudip training, I did not know the difference between he/her. Now my English has improved. It also helped me develop my confidence! I was an introvert, but now I am a very social person. It is all because of Anudip"
- Student, Anudip, India

Developing the Ability to Have Deeper Conversations

"Ready4K makes my child think deeply and internally about some of the questions. Our conversations are less superficial and more relevant now. It also helps him develop an emotional understanding about himself."
- Parent participating in ParentPowered's Ready4K program, USA



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