CaribTel Customer Experience Tracker

Wave 2 vs Wave 3: Quarterly Comparison Report

Market Divergence, Barbados Crisis, and the Pricing Paradox

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List of Abbreviations

CES	Customer Effort Score
CI	Confidence Interval
CRM	Customer Relationship Management
CSAT	Customer Satisfaction Score
CX	Customer Experience
NPS	Net Promoter Score
SMS	Short Message Service

Executive Summary

Wave 3 (July-August 2026) of the **CaribTel Customer Experience Tracker** ran six months after Wave 1 and three months after the Wave 2 pricing paradox finding. Between the two waves, CaribTel launched a loyalty value bundle in Jamaica and Trinidad & Tobago but did not extend it to Barbados.

Headline numbers look encouraging:

- **NPS overall: -18.5 to -16.6** (+1.9 points)
- **Churn intent: 41.6% to 35.9%** (-5.7 pts)
- **CES (mean): 3.05 to 2.99** (-0.1)

Do not be misled by the aggregate. Jamaica - the largest market at 52% of the customer base - responded strongly to the value bundle. That recovery is masking a structural collapse in Barbados:

- Barbados NPS: -30.4 → **-37.6** (-7.2 points)
- Barbados churn intent: 44.2% → **54.5%** (**)
- 37% of Barbados detractors cite pricing as their primary complaint
- Flow is now the preferred switching destination in Barbados, overtaking Digicel

Three findings define Wave 3:

1. **The bundle works - where it was deployed.** Jamaica recovered, T&T consolidated. The intervention mechanism is confirmed.
2. **Barbados is in a structural loyalty crisis.** NPS at -37.6, churn intent above 50%, and growing competitor traction from Flow.
3. **Market-level divergence makes aggregate reporting dangerous.** A headline NPS improvement conceals the worst country-level result in the tracker's three-wave history.

1 Methodology

1.1 Wave-over-wave design

All three waves used **identical core questionnaires, sampling methodology, and mode**, ensuring valid longitudinal comparison. Wave 3 added a three-question ad-hoc module on pricing perception and bundle awareness.

Table 1: Comparative methodology summary

Parameter	Value
Field period: Wave 2	April 15 - May 5, 2026
Field period: Wave 3	July 15 - August 5, 2026
Mode	SMS invitation $\rightarrow$ Enketo web form (self-administered)
Universe	Active CaribTel customers ($\geq$ 1 billable event in past 90 days)
Sampling method	Stratified random sampling, independent cross-sections per wave
Achieved sample: Wave 2	1700 valid responses
Achieved sample: Wave 3	1550 valid responses
Weighting	Post-stratification by country (CRM population shares)
Significance testing	Two-proportion z-test ($\alpha = 0.05$)
Ad-hoc module (Wave 3 only)	AH1: bundle awareness; AH2: price fairness (1-5); AH3: pricing format preference

1.2 Design integrity

- **Core instrument unchanged** across all three waves - all Q1-Q24 wording and scale anchors are identical
- **Independent samples** per wave (not panel): avoids attrition bias and respondent fatigue
- **Significance levels**: `***` $p < 0.001$, `**` $p < 0.01$, `*` $p < 0.05$, `ns` not significant

2 Headline Comparison

2.1 Overall KPI scorecard

Table 2: Headline KPI comparison (overall, population-weighted)

Metric	Wave 2	Wave 3	Change
NPS	-18.5	-16.6	+1.9 (ns)
CSAT Top-2 (%)	39.1%	39.6%	+0.5%
CES (mean, 1–5)	3.05	2.99	-0.06
Churn intent (%)	41.6%	35.9%	-5.7% (*)

*Significance: * p < 0.05; ** p < 0.01; *** p < 0.001; ns = not significant*

2.2 NPS trajectory: three-wave trend by country

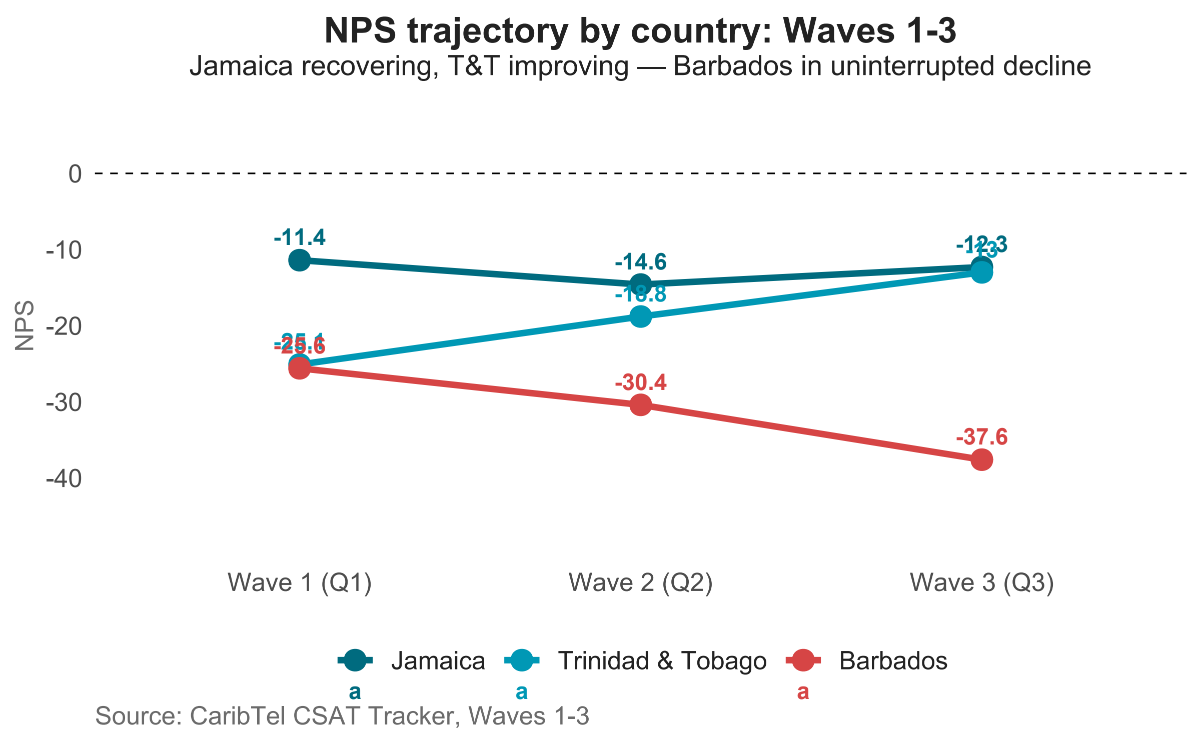

Figure 1: NPS trajectory by country: Waves 1-3

3 NPS Composition Changes

3.1 Detractors, passives, promoters by wave

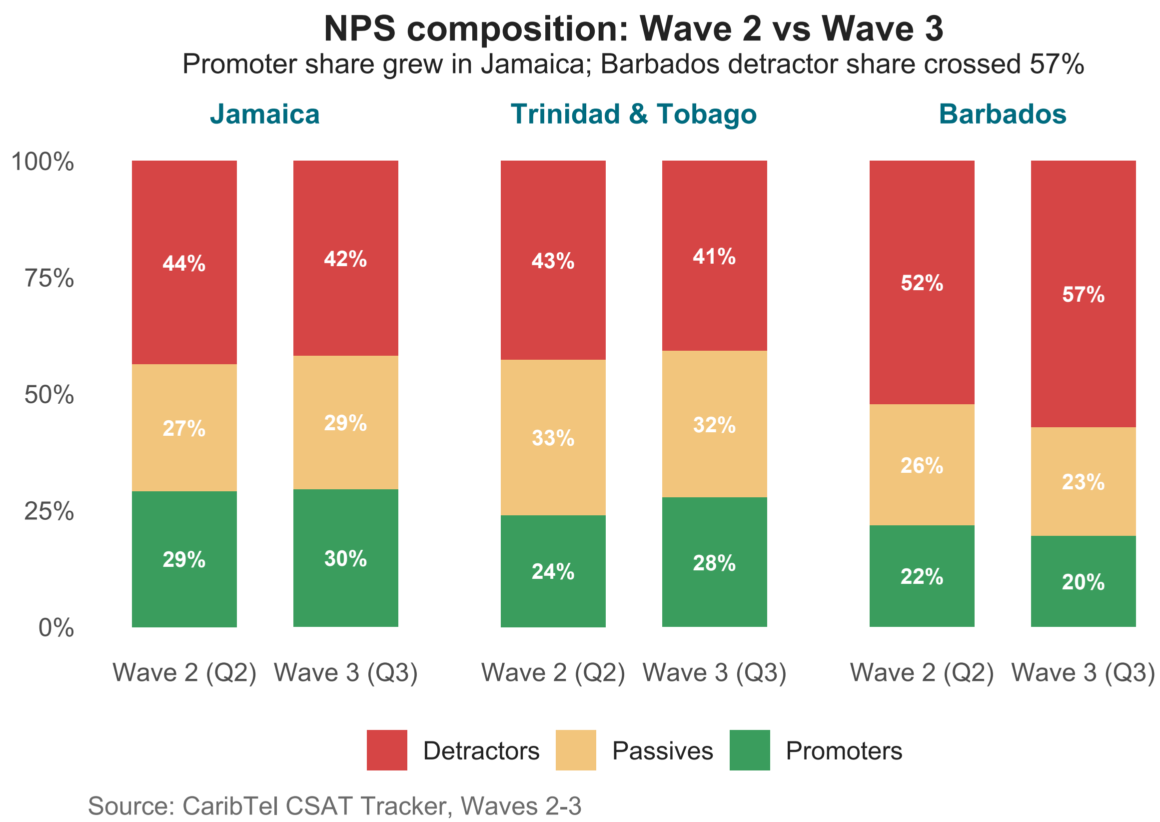

Figure 2: NPS composition by country: Wave 2 vs Wave 3

4 Driver Performance

4.1 Satisfaction drivers: Wave 2 vs Wave 3

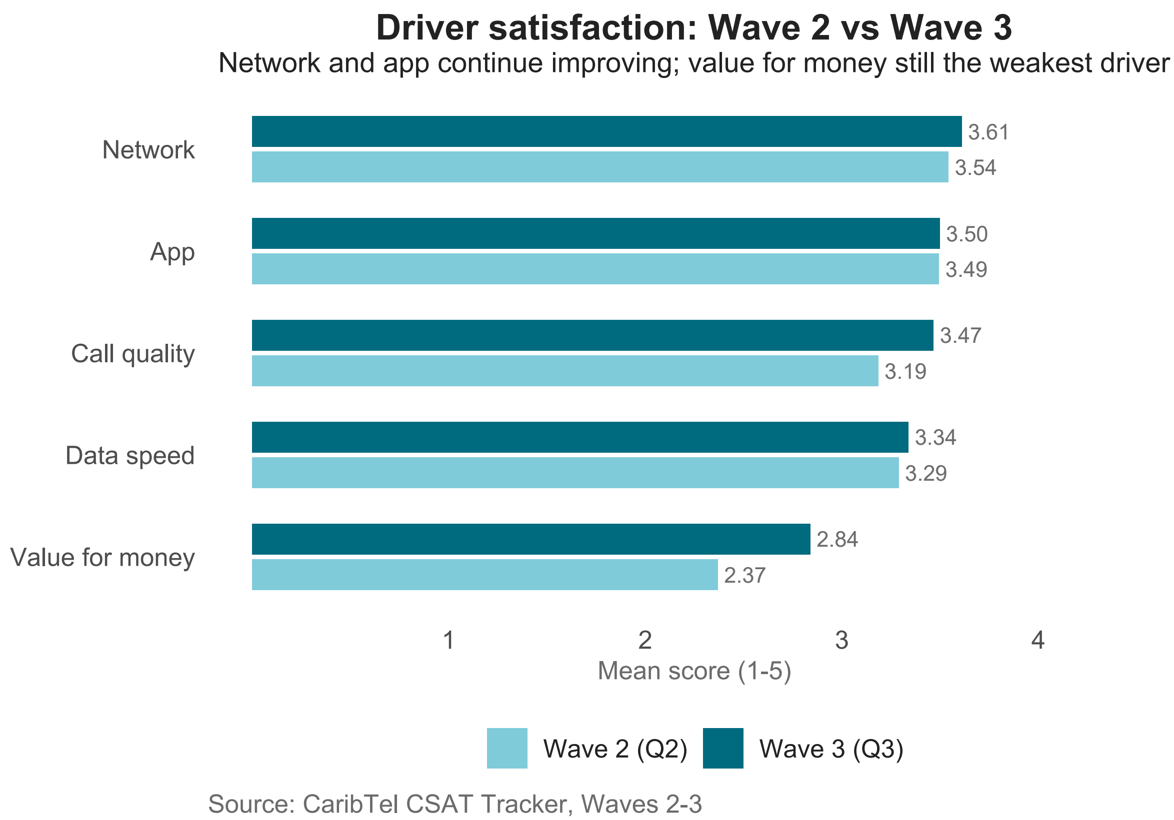

Figure 3: Satisfaction driver scores: Wave 2 vs Wave 3

4.2 Value for money: the persistent gap

Table 3: Value for money driver by country: three-wave trend

Country	W1	W2	W3	W2 vs W1	W3 vs W2
Jamaica	2.37	2.41	3.06	0.04	0.65
Trinidad & Tobago	2.35	2.40	2.83	0.05	0.43
Barbados	2.32	2.16	2.16	-0.16	0.00

5 Detractor Reasons: Pricing Diverges by Market

5.1 Overall detractor reasons

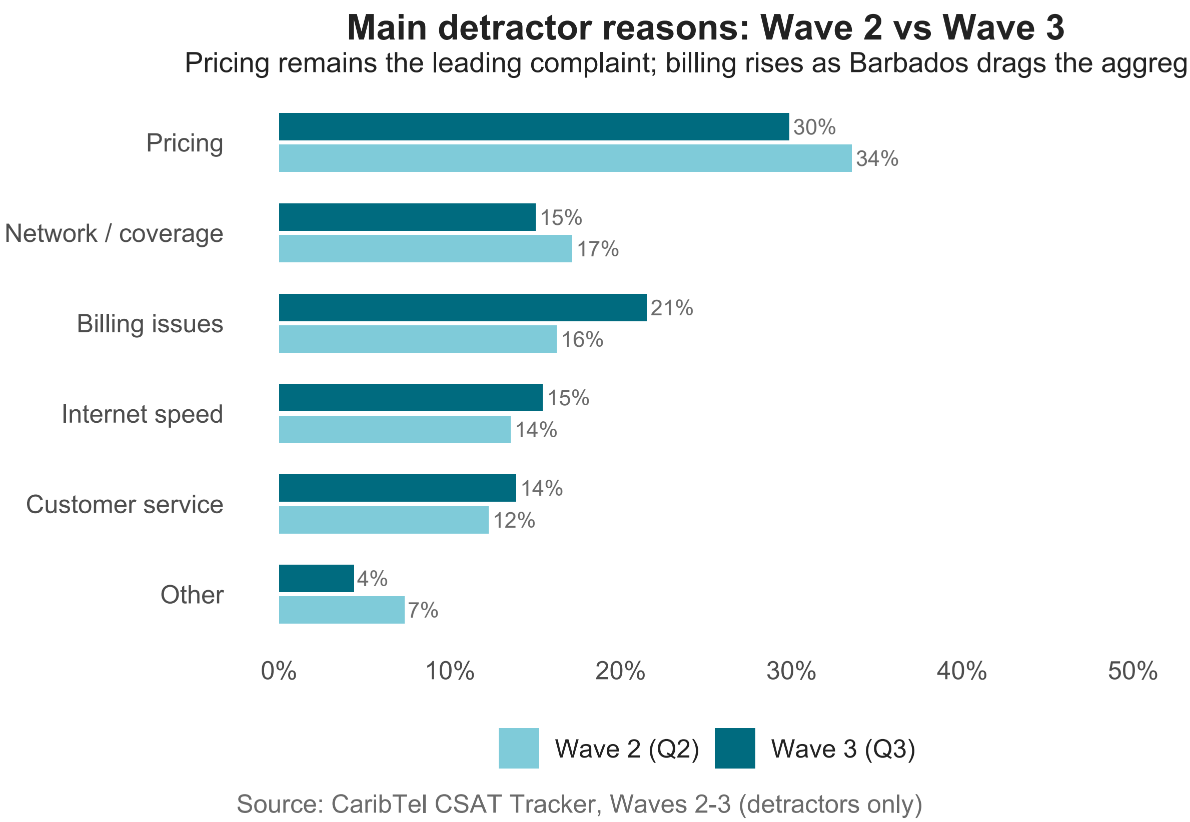

Figure 4: Main detractor reasons: Wave 2 vs Wave 3

5.2 Detractor reasons by country - Wave 3

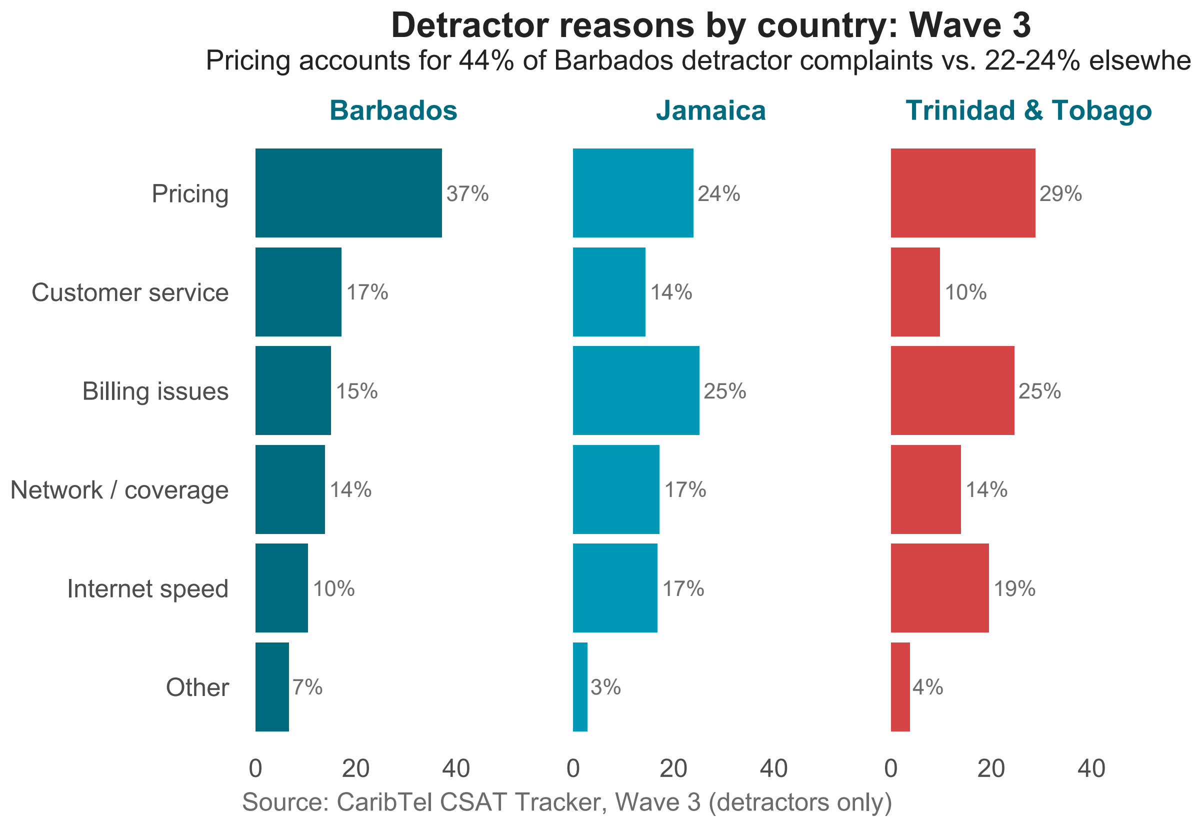

Figure 5: Detractor reasons by country: Wave 3

6 The Barbados Crisis

6.1 A market in structural decline

Barbados has now recorded the worst NPS in the tracker's history at -37.6. It received no operational interventions in Q1 and was excluded from the loyalty bundle launched in Q2. Three waves of data now show a consistent pattern: every KPI is moving in the wrong direction.

Table 4: Barbados - three-wave KPI trend

Metric	Wave 1	Wave 2	Wave 3
NPS	-25.6	-30.4	-37.6
CSAT Top-2 (%)	37.0%	34.2%	27.4%
Churn intent (%)	38.1%	44.2%	54.5%
Price: % citing as #1 issue	20%	37%	37%

6.2 Competitor traction: Flow gaining in Barbados

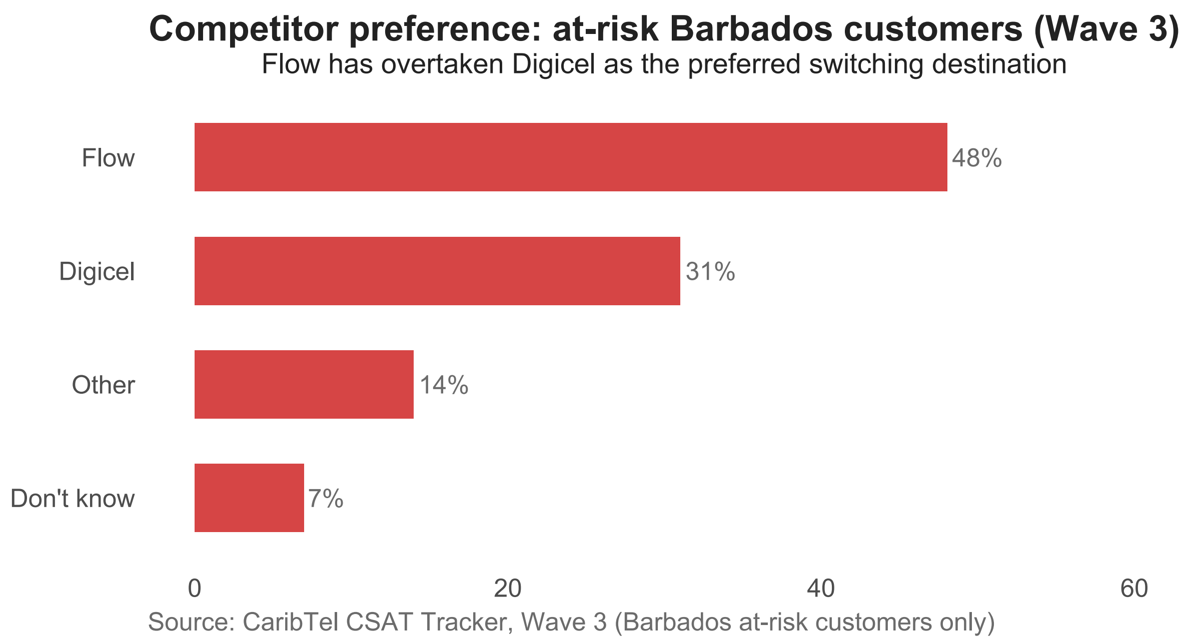

Figure 6: Competitor preference among at-risk customers: Barbados, Wave 3

7 Pricing Perception: Ad-hoc Module Results

7.1 Bundle awareness by country

Wave 3 included three bonus questions probing pricing perception and bundle awareness. Results reveal the equity gap created by the uneven rollout.

Table 5: AH1: Awareness of CaribTel's Q2 value bundle, by country

Country	Aware (%)	Not sure (%)	Unaware (%)
Barbados	11.2	12.4	76.4
Jamaica	65.0	10.3	24.7
Trinidad & Tobago	52.8	11.9	35.3

7.2 Price fairness perception

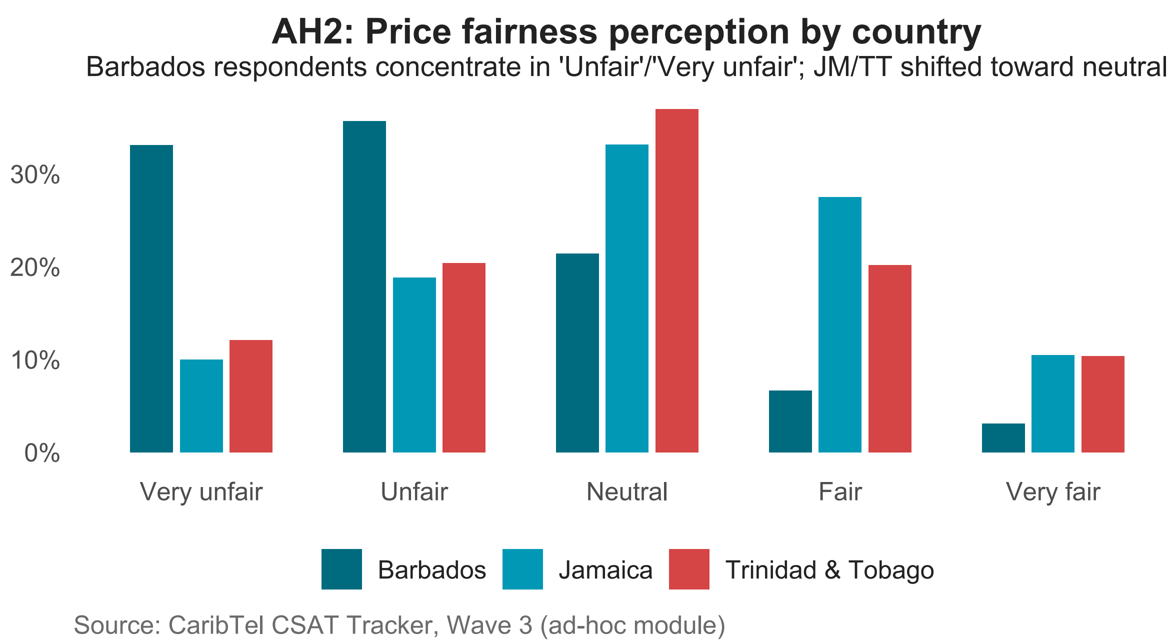

Figure 7: Price fairness perception by country: Wave 3

7.3 Pricing format preference

Table 6: AH3: Preferred pricing format by country

Country	Fixed bundle (%)	Pay-as-you-go (%)	No preference (%)
Barbados	68.3	19.0	12.6
Jamaica	62.7	25.8	11.5
Trinidad & Tobago	59.8	29.2	10.9

Key finding: Barbados shows the strongest preference for a fixed bundle (68%), despite having the lowest bundle awareness. Customers know what they want; they are simply not being offered it.

8 Churn Risk: A Market-Level Story

8.1 Churn intent trajectory: three waves

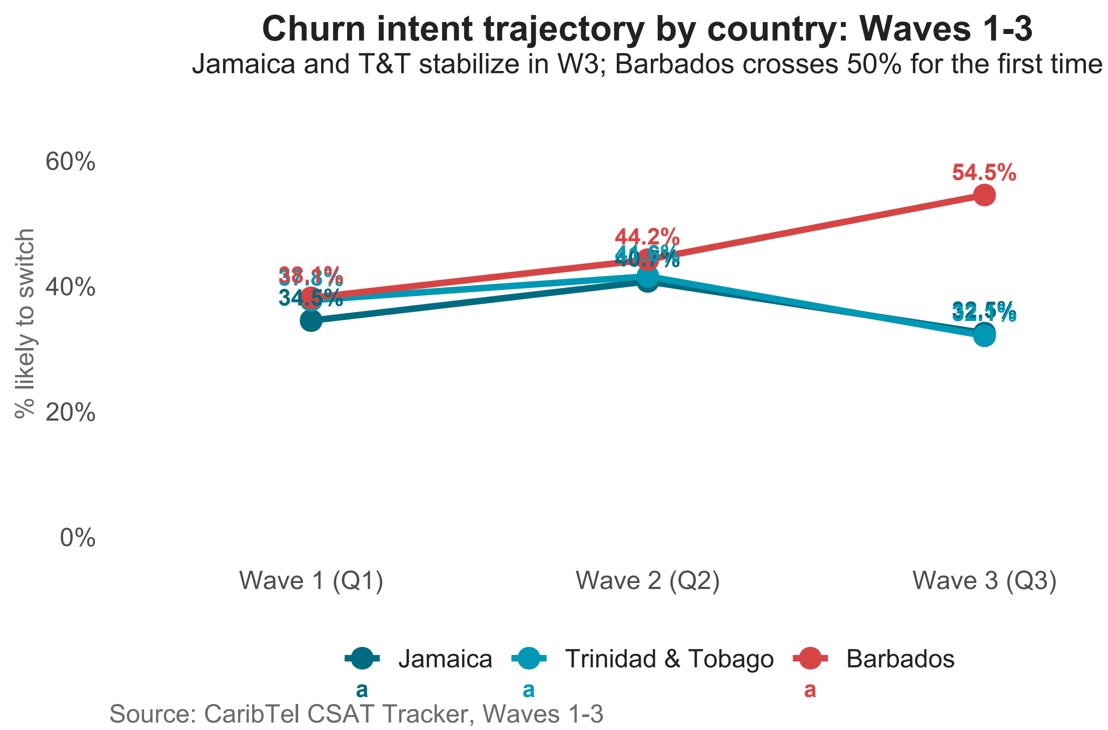

Figure 8: Churn intent trajectory by country: Waves 1-3

8.2 Statistical tests: churn change by country

Table 7: Churn intent change: two-proportion z-tests by country

Country	W2 (%)	W3 (%)	Change	p-value	Significance
Trinidad & Tobago	41.6%	32.1%	-9.5 pts	0.001	**
Barbados	44.2%	54.5%	+10.3 pts	0.002	**
Jamaica	40.7%	32.5%	-8.2 pts	0.002	**

9 The Strategic Paradox - Wave 3 Edition

9.1 Aggregate recovery, market collapse

The Wave 3 headline NPS of -16.6 marks the best result in the tracker's history. It is also the most dangerous moment in the tracker's history.

The aggregate improvement is driven almost entirely by Jamaica - the largest market - responding to the loyalty bundle. That response confirms the intervention works. The bundle mechanism is validated. The problem is where it was not deployed.

Barbados received no bundle, no operational investment, and no pricing relief across three consecutive waves. The result is now visible in the data: NPS at -37.6, churn intent at 54.5%, pricing cited by 37% of detractors, and Flow - not Digicel - emerging as the primary competitor threat. Customers are not leaving for a better network. They are leaving because they cannot afford to stay.

The ad-hoc module makes the mechanism explicit. Barbados respondents have the highest preference for a fixed bundle (68%) and the lowest bundle awareness (11%). They know what solution looks like. They are watching it be offered to their neighbours.

10 Conclusions and Recommendations

10.1 What worked

- **The loyalty bundle drove Jamaica's recovery.** NPS improved, churn intent fell, price fairness perception shifted toward neutral. The intervention is confirmed to work.
- **Trinidad & Tobago consolidated Wave 2 gains.** Three-wave trajectory now shows consistent, if slow, improvement.
- **Operational improvements continued.** Network, app, and CES scores kept improving in Jamaica and T&T.

10.2 What is urgent

- **Barbados is in a structural loyalty crisis.** NPS -37.6, churn intent above 50%, Flow gaining market share. This is no longer a trend to monitor - it is a retention emergency.
- **Aggregate reporting is hiding the risk.** Jamaica's size makes the company-wide numbers look healthy while Barbados deteriorates. Segment-level tracking must drive decision-making, not headline averages.

10.3 Recommendations for Q4

R1

Critical

: Deploy the bundle in Barbados immediately. The ad-hoc module confirms both high bundle preference and near-zero awareness. The mechanism works - it just hasn't been used here. Every quarter of delay costs loyalty that will not be recovered.

R2

High

: Launch a Barbados-specific retention campaign. Identify the highest-intent-to-switch customers through CRM and target them with direct outreach before the Q4 wave. Do not wait for the survey to measure the exit.

R3

Medium

: Continue the operational roadmap in all three markets. CES and network scores are improving; the playbook is working. Barbados infrastructure investment should be prioritised to match the level already applied in Jamaica and T&T.

R4

Tracker

: Run Wave 4 in Q4 with identical core methodology. Include a Barbados-specific module probing bundle reception if R1 is executed - this will confirm whether the intervention lands the same way it did in Jamaica.

Report produced as part of a survey design portfolio project. CaribTel and all data presented herein are entirely fictional.
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