

**PUBLIC UTILITIES  
REGULATORY COMMISSION**



# **REGULATORY BRIEF**

**ISSUE 14**

2024 Regulatory Expectation Survey:  
Consumers' Satisfaction and  
Expectation of Utility Service  
Providers and Regulatory  
Services

## KEY HIGHLIGHTS

**Reliability:** About 54% of utility consumers generally feel there is some consistency in the delivery of reliable services, meeting their expectations most of the time, although there are occasional lapses.

**Assurance:** 58% of respondents have high confidence in PURC's expertise and ability to manage utilities effectively while 51% have high confidence in the service providers' expertise and ability to manage utilities effectively.

**Tangibles:** There is high consumer satisfaction with the facilities of NEDCo and ECG while relatively low to moderate satisfaction with regard to GWL and PURC.

**Empathy:** Approximately 49% of respondents believe that while PURC demonstrates some empathy, there is room for improvement in personalized service. Close to 55% of respondents feel that the utilities lack empathy, pointing to instances where their concerns were not adequately addressed.

**Responsiveness:** 60% and 57% of respondents were satisfied with PURC's and the utilities responsiveness respectively, while acknowledging occasional slow response times and unresolved issues.

## 1. Introduction

This issue of the Regulatory Brief presents findings of a Regulatory Expectation Survey carried out by the Public Utilities Regulatory Commission (PURC) in 2024 to assess the level of customer satisfaction and expectations with respect to regulatory and utility service provision.

The brief also provides some comparative analysis on the findings of same activity carried out by the Commission in 2023. This comparison is done to determine the dynamics in responses with respect to how consumer satisfaction and expectations of the Commission in particular had evolved over the past year.

### 1.1 About the PURC Regulatory Expectation Survey

The PURC Regulatory Expectation Survey is undertaken annually to assess the quality of service rendered by the regulated utilities and by the Commission itself, and to determine how well the services provided by these entities meet the satisfaction and expectations of consumers and the public. In so doing, the Commission is able to obtain first-hand information about the experiences and expectations of the public, and also ascertain how well the public perceives the Commission's regulatory activities so as to activate the necessary interventions to help address any regulatory gaps.

### 1.2 Scope of Survey

The survey in 2024, covered all 16 regions of Ghana. One thousand, six hundred and ninety-six (1,696) consumers of water and electricity in the regulated electricity and water utilities were sampled using a mixed sampling design. The specific utilities considered in the survey were the Ghana Water Limited (GWL), Electricity Company of Ghana (ECG), and the Northern Electricity Distribution Company (NEDCo).

## 2. Results of the Survey

### 2.1 Demographic Information of Respondents

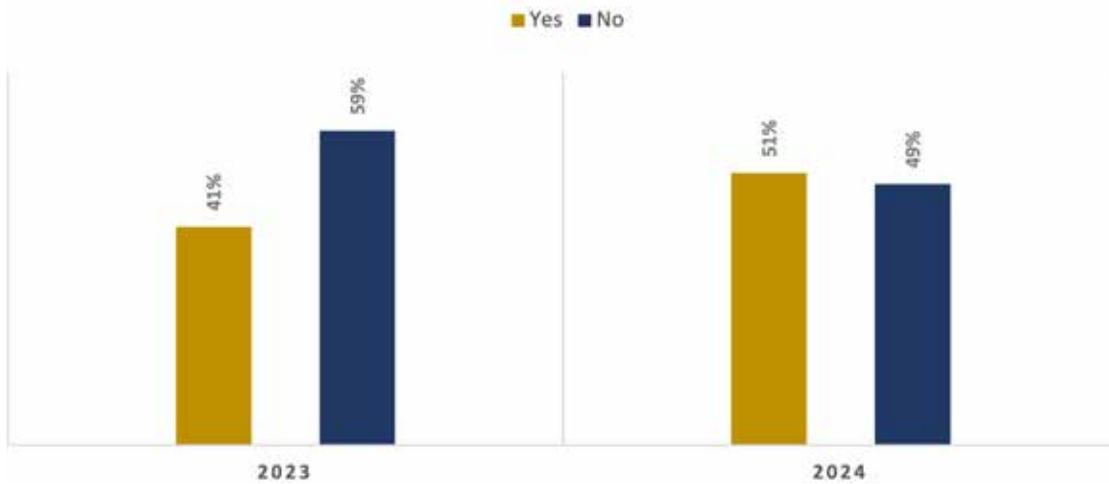
Responses were obtained from 1,696 respondents across the country. This number was however a reduction from the 2,175 respondents who participated in the 2023 survey. Respondents comprised residential and non-residential customers including academic institutions, utility service providers, and government institutions. Approximately 58% of these respondents have been customers of the utilities for over 10 years.

### 2.2 Regulatory Satisfaction and Expectations of the PURC

#### 2.2.1 Stakeholder Experience with the Commission

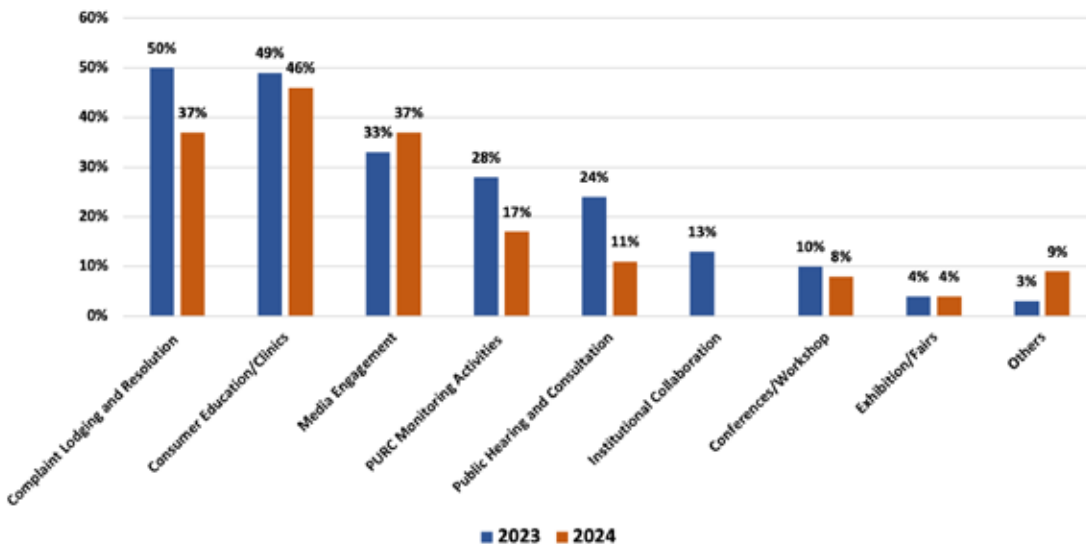
The survey sought to determine stakeholders' prior experiences and interactions with the Commission. The findings presented in Figure 1 suggests that about 41% of respondents had prior engagements or interactions with the Commission in 2023. This number however increased to 51% in 2024, indicating that more stakeholders are becoming aware of the PURC.

Figure 1: Stakeholder Engagement with the Commission



Survey participants who responded affirmatively encountered the Commission through various means as presented in Figure 2. The statistics in 2023 and 2024 shows that most respondents engaged the Commission by filing complaints during consumer education programs and media engagements in the various regions.

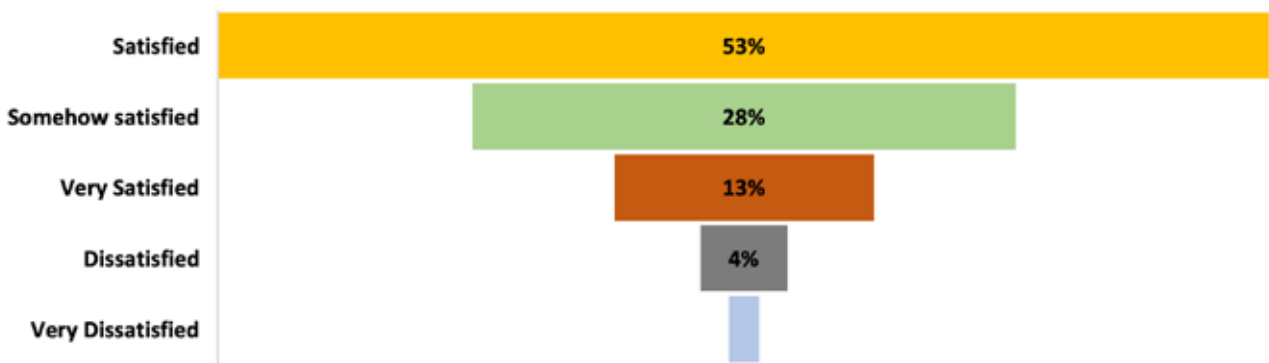
Figure 2: Stakeholder Experience with the Commission



### 2.2.2 Customer Satisfaction with Operations of PURC

In 2024, the majority of the respondents (91.90%) indicated that they would recommend the services of PURC to others after stating how satisfied they were with the Commission’s regulatory performance. This was an improvement over 2023, where 89% of respondents affirmatively recommended the services of PURC to others. Reasons attributed to the decisions of respondents are detailed in the full survey report available on the PURC website

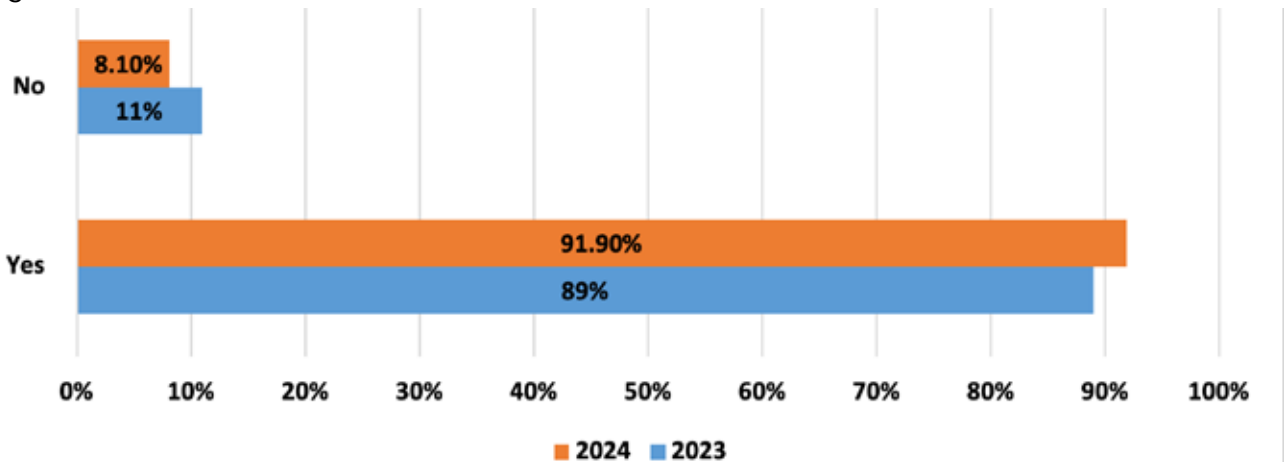
Figure 3: Satisfaction with PURC's Regulatory Performance, 2024



### 2.2.3 Recommending PURC to Others

In 2024, the majority of the respondents (91.90%) indicated that they would recommend the services of PURC to others after stating how satisfied they were with the Commission’s regulatory performance. This was an improvement over 2023, where 89% of respondents affirmatively recommended the services of PURC to others. Reasons attributed to the decisions of respondents are detailed in the full survey report available on the PURC website.

Figure 4: Recommendation of PURC



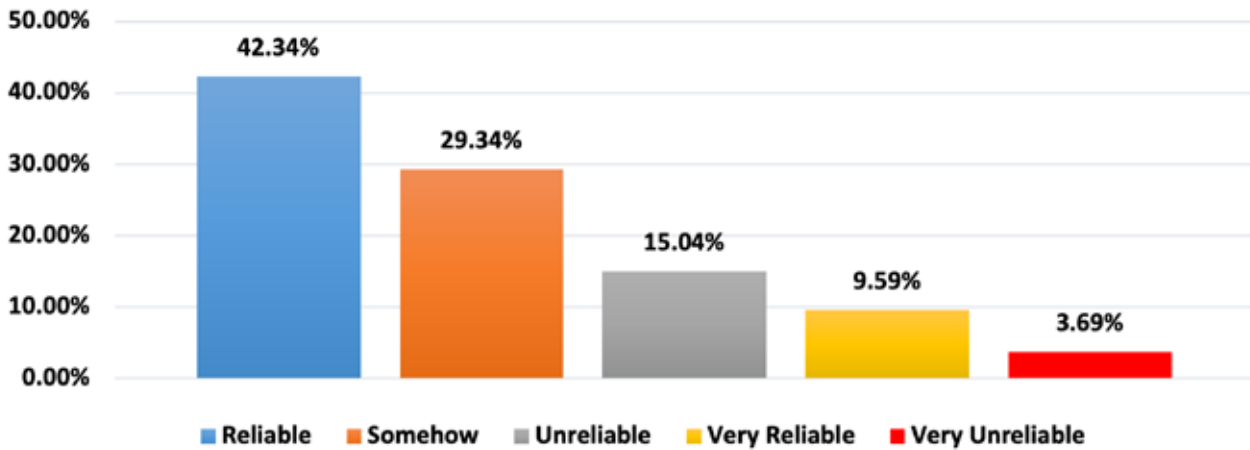
### 2.3 2024 Customer Satisfaction with Ghana Water Limited (GWL)

This section of the report sought feedback from customers of the Ghana Water Limited (GWL) with respect to their experiences and satisfaction with the services rendered by the utility.

#### 2.3.1 Reliability of Water Supply from GWL

Reliability denotes the ability of GWL to be able to perform the required service dependably and accurately. Majority of survey respondents (42.3%) indicated that, water supply from GWL was reliable, while 15.04% of respondents indicated that supply was unreliable.

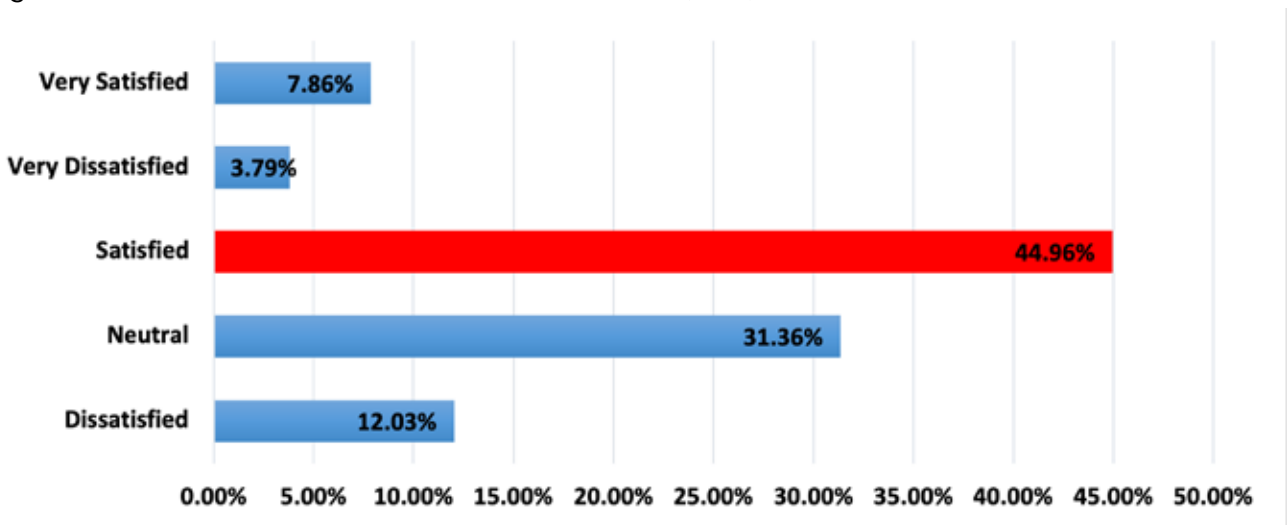
Figure 5: Reliability of Water Supply from GWL (2024)



#### 2.3.2 Customer Satisfaction with GWL’s Customer Service

Respondents in this survey assessed GWL with respect to the quality of customer service extended to stakeholders. As shown in Figure 6, most respondents (45%) indicated that, they were satisfied with GWL’s customer service. The findings suggest that with a little effort by GWL, more consumers could be drawn to the company’s services, although the alternative way is equally possible given the over 30% neutral respondents.

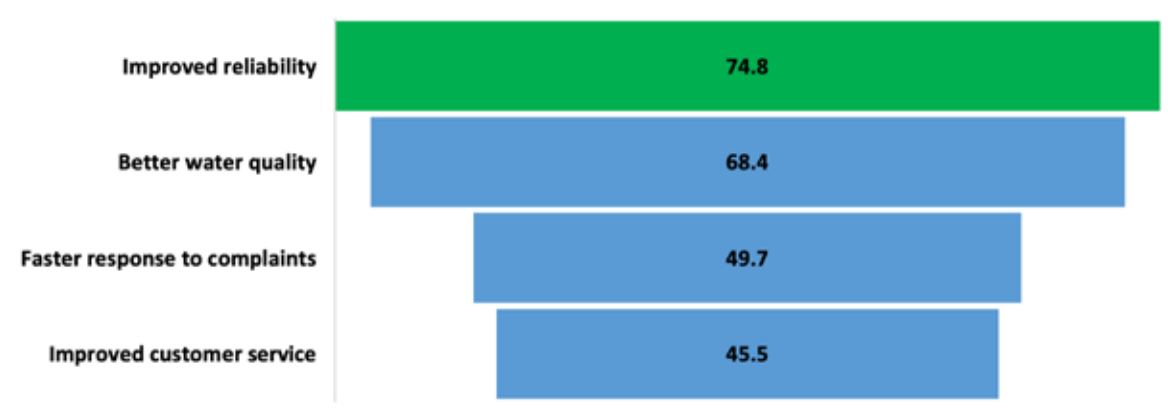
Figure 6: Customer Satisfaction with GWL Customer Service (2024)



### 2.3.3 Expected Improvements in GWL’s Services

Following the reliability of supply and satisfaction of stakeholders, respondents were further asked to provide their expected improvements with respect to the services provided by GWL. Typical of consumers, better and quality services were expected from most respondents. The responses of consumers were grouped into four thematic areas as presented in Figure 6.

Figure 7: Expected Improvement in Services



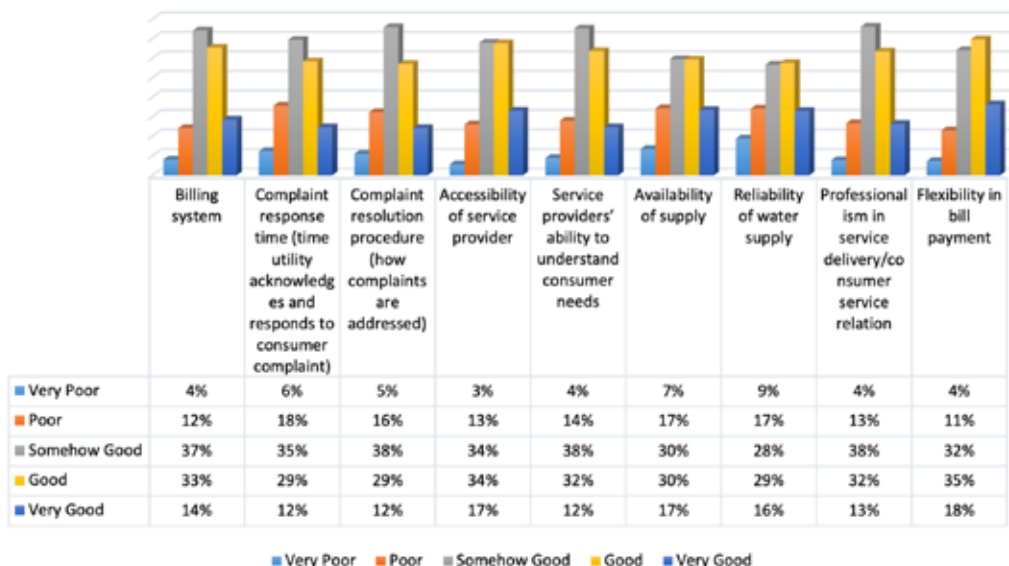
### 2.3.4 Accessibility to GWL Offices

This is a component of tangibility where respondents were asked to indicate the ease of locating and accessing the offices of the utility company. Tangibles are the ‘visible’ aspects of the service that are employed by businesses to improve external customer satisfaction. How satisfied consumers are with this component contributes significantly to the overall satisfaction of consumers. The Customer Satisfaction Score (CSAT) results showed that only 2 out of 10 respondents indicated the offices of GWL are either easy or very easy to access or locate. Most respondents could not readily locate GWL offices or that the offices were not easily accessible to them.

### 2.3.5 Customer Satisfaction with Quality-of-Service Delivery (Water)

This survey ascertained customers’ satisfaction with the quality of service offered by GWL nationwide. The results showed that majority of respondents were not impressed with most of the indicators presented for assessment. Details of these are presented in Figure 7.

Figure 8: Customer Satisfaction with Quality-of-Service Delivery

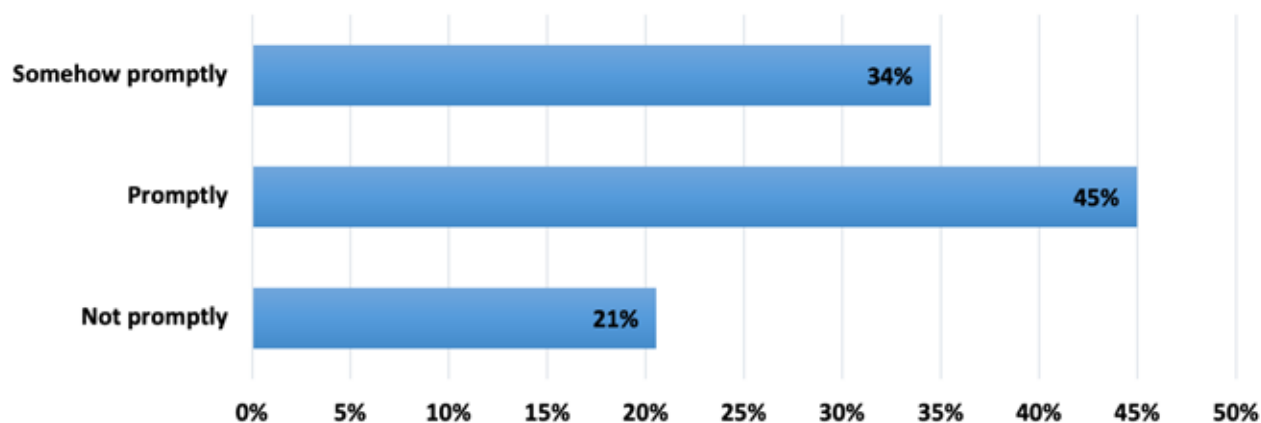


The findings from the above results implied that customers were generally not satisfied with the quality of services provided by GWL.

### 2.3.6 Responsiveness to Customer Requests (Water)

Responsiveness in terms of this consumer satisfaction survey basically refers to the will and the promptness with which a utility provides service to its customers. Respondents were thus asked to assess GWL's promptness in responding to their requests. Majority of the respondents (45%) indicated GWL has been prompt in providing feedback to their requests. However, 21% of respondents indicated that GWL has not been prompt with requests.

Figure 9: Promptness to Customer Requests (2024)



## 2.4 2024 Satisfaction with the Electricity Distribution Companies

### 2.4.1 Electricity Service Providers of Respondents

This nationwide survey necessitated identifying the specific electricity service provider of all respondents given that the southern part of Ghana is served by the Electricity Company of Ghana (ECG), while the northern part is served by the Northern Electricity Distribution Company (NEDCo). This finding is presented in Table 1.

Table 1: Electricity Service Provider of Respondents

ELECTRICITY SERVICE PROVIDER	FREQUENCY	PERCENT
Electricity Company of Ghana (ECG)	980	55%
Northern Electricity Distribution Company (NEDCo)	791	45%
Total	1771	

### 2.4.2 Reliability of Electricity Supply (NEDCo & ECG)

Analysis of respondents' assessment of electricity reliability was conducted under the respective service providers. For consumers of ECG, the average rating was 3.4 with a CSAT of 52%. This means that 5 out of 10 people indicated that the service supply of ECG is either reliable or very reliable. In the case of NEDCo, 62% of the customers rated the reliability of NEDCo services as either reliable or very reliable (See Table 2).

Table 2: Reliability of Electricity Supply (ECG and NEDCo)

EVALUATION QUESTION	ECG	NEDCO
How would you rate the reliability of electricity from your supplier?		
Average Rating	3.44	3.67
CSAT (%)	52%	62%
Std Deviation	0.76	0.65

### 2.4.3 Customer Satisfaction with Electricity Service Provider

Customer services provided by ECG and NEDCo were assessed by respondents who indicated their level of satisfaction. Using the same parameters for GWL, the findings revealed that both ECG and NEDCo had a weak satisfaction rating. For ECG, 4 out of 10 consumers find their services satisfactory while for NEDCo 5 out of 10 respondents. Generally, as presented in Table 3, both utility companies are rated average in terms of their performance in consumer service provision.

Table 3: Customer Satisfaction with ECG and NEDCo

EVALUATION QUESTION	ECG	NEDCO
How satisfied are you with the customer service provided by your supplier?		
Average Rating	3.40	3.40
CSAT (%)	48%	52%
Std Deviation	0.97	0.97

### 2.4.4 Expected Improvements in Services provided by Electricity Supplier

Based on the experiences of respondents of the services rendered by their respective service providers, the survey sought to determine the expectations of respondents and areas they require the utility companies to improve upon. Generally, the feedback and expectations were alike for both utilities. For instance, 76.7% of ECG customers said the company should improve in service reliability while 69% of NEDCO customers indicated same. Similarly, 61.2% of ECG and 68% of NEDCo consumers mentioned the utilities should focus on more accurate billing.

Table 4: Expected Improvements by Customers

EXPECTATION	PERCENTAGE OF ECG RESPONDENTS	PERCENTAGE OF NEDCO RESPONDENTS
Improvement in service reliability	76.7	69
Accurate billing	61.2	68
Faster response to complaints	48	51.7

Other expectations expressed by respondents include:

*"They should come regularly to read the meters and not wait for the bills to pile up"*

*"I expect ECG staff to bring our bills in time"*

*"Improvement on our revenue collection"*

*"Timely delivery of bills"*

*"Reduction of electricity tariff and bills"*

*"Meters should be available for the customers and acquisition process should be easy and fast".*

### 2.4.5 Accessibility to Offices of Electricity Service Provider

This parameter intended for respondents to assess the ease with which they access or locate the offices of the utilities. Analysis of the data on ECG suggests a high average rating in that respect. The results indicate that 8 out of 10 respondents revealed that the offices of ECG are easily accessible to them in their areas of jurisdiction. Similar results were recorded for NEDCo as presented in Table 5.

Table 5: Office Accessibility Rating of ECG

EVALUATION QUESTION	ECG	NEDCO
<b>How easily are you able to locate the offices of your electricity service provider?</b>		
Average Rating	4.09	4.01
CSAT (%)	82%	81%
Std Deviation	0.53	0.63

### 2.4.6 Customer Satisfaction with Quality-of-Service Delivery (Electricity)

The quality of electricity supply has become topical in Ghana for most electricity consumers. This survey therefore provided respondents the opportunity to assess their electricity service providers on some key service quality parameters as presented in Table 6. Generally, ECG received good rating by its customers with the least CSAT score of 62% for billing system. Accessibility to ECG offices had the highest CSAT score of 78% indicating that 7 out of 10 were either satisfied or very satisfied with accessibility to the company.

Table 6: Customer Satisfaction with Quality of Service (ECG)

STATEMENT (ECG)	AVERAGE RATING	CSAT SCORE
Billing system	2.61	62%
Complaint response time (time utility acknowledges and responds to consumer com-plaint)	2.70	63%
Complaint resolution procedure (how complaints are addressed)	2.74	64%
Accessibility of service provider	3.03	78%
Service providers' ability to understand consumer needs	2.80	67%
Availability of power supply	2.94	75%
Reliability of power supply	2.80	67%
Professionalism in service delivery/consumer service relation	2.85	72%
Flexibility in bill payment	2.81	69%

Similarly, in the case of NEDCo, the company had high rating with respect to quality-of-service delivery. Complaint response time was the parameter with the least CSAT of 62%, suggesting that 6 out of 10 customers are satisfied with the response time of NEDCo to their concerns. Complaint resolution also had a comparatively low CSAT of 64%. Accessibility of the service provider and availability of power had the highest CSAT scores of 80% and 82% respectively. This means a strong satisfaction with respect to access to NEDCo offices and the availability of power supply.

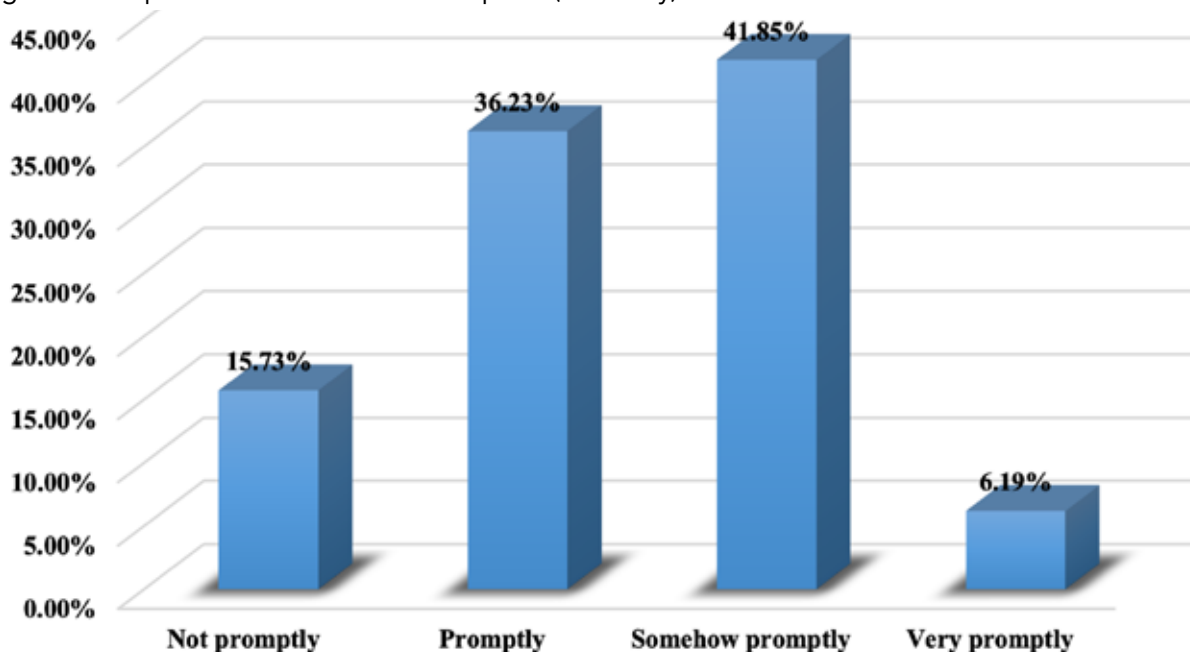
Table 7: Customer Satisfaction with Quality of Service (NEDCo)

STATEMENT (NEDCo)	AVERAGE RATING	CSAT SCORE
Billing system	2.86	70%
Complaint response time (time utility acknowledges and responds to consumer complaint)	2.71	62%
Complaint resolution procedure (how complaints are addressed)	2.74	64%
Accessibility of service provider	3.01	80%
Service providers' ability to understand consumer needs	2.84	70%
Availability of power supply	3.16	82%
Reliability of power supply	3.06	75%
Professionalism in service delivery/consumer service relation	2.76	66%
Flexibility in bill payment	2.88	71%

### 2.4.7 Responsiveness to Customer Requests (Electricity)

This parameter measures the relative promptness with which electricity service providers respond to the needs and queries of their customers. As presented in Figure 9, majority of respondents representing about 42% indicated that, they were somehow satisfied with the responsiveness of their service provider. About 16% of respondents indicated that, their service providers were not prompt in responding to their requests.

Figure 10: Responsiveness to Customer Requests (Electricity)



## 2.5 Overall Satisfaction with Utility Service Provision

Having analysed the individual utility companies, this section was designed for respondents to make their overall judgement of the utility sector (water and electricity). The results as presented in Table 8 suggest weak customer satisfaction. The estimated weighted rating was 3.4 with a CSAT of 49%. This is an indication that majority of respondents are not satisfied with the services rendered by both the water and electricity utilities.

Table 5: Office Accessibility Rating of ECG

STATEMENT	AVERAGE RATING	CSAT (%)	STD. DEVIATION
Overall Consumer Satisfaction	3.4	49%	1.91

## 2.6 Customer Expectations of Utility Service Providers and PURC

Based on the overall assessment of both water and electricity utilities, respondents provided some comments and suggestions with respect to their expectations of services rendered by the utilities and PURC. These are outlined below.

*"The services of ECG are very poor and I believe if they get competitors they will sit up"*

*"We need improvement in the services provided. We need value for our monies. It is quite frustrating when your lights just go off without warning".*

*"ECG and Ghana water should improve on their reliability"*

*"NEDCo should do more extensions"*

*"NEDCo should purchase more meters and make them available when customers apply for them".*

*"They should have time for customers"*

*"They should understand the situation customers are going through"*

*"They should learn to understand customers"*

*Additionally, most respondents expect PURC to reduce tariffs in the coming years and also to ensure transparency in the tariff process. Several respondents stated that'*

*"Tariff should be reduced in the year 2025"*

*"PURC should do more on Community engagements with consumers"*

In summary, respondents expect an improvement in the current services rendered by utilities and hope that , PURC will engage more with consumers in 2025.

### 3. Conclusions and Recommendations

The survey results provide vital information about stakeholder attitudes and expectations of PURC and service providers. While overall satisfaction is low, there is room for improvement, particularly in terms of service delivery, openness, and consumer protection. By addressing the following areas and implementing the recommendations, PURC and the utilities can continue to meet the demands of their stakeholders.

#### **Recommendations for the Public Utilities Regulatory Commission (PURC)**

It is recommended that the Commission intensifies public engagement through social media and other platforms to gather feedback and address concerns.

The Commission as the arbiter must improve the efficiency and effectiveness of the complaint resolution process to ensure timely responses to consumer issues.

There is the need for the Commission to intensify its leverage of modern technology to streamline operations and improve service delivery. The visibility of the Commission still remains low and efforts must be made to ensure there is improvement.

#### **Recommendations for Utility Service Providers**

Utility companies must adopt smart management systems to monitor and optimize water and electricity usage and distribution. Similarly, efforts must be made to utilize data analytics to improve decision-making and operational efficiency.

There is the need for utility companies to collaborate with PURC on joint initiatives aimed at improving service delivery and addressing sector challenges. This particularly can be done in the area of consumer education, etc



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Consumption (kWh) -----> Total Amount (GHS)

Customer Type: Residential

Preference: Consumption (kWh)

Consumption (kWh):

Energy Charge (GHS):

Levies/Taxes (GHS):

Service Charge (GHS):

Total Amount (GHS):

**CALCULATE**

**WATER TARIFFS**

Consumption (m3) -----> Total Amount (GHS)

Customer Type: Residential

Preference: Consumption (m3)

Consumption (m3):

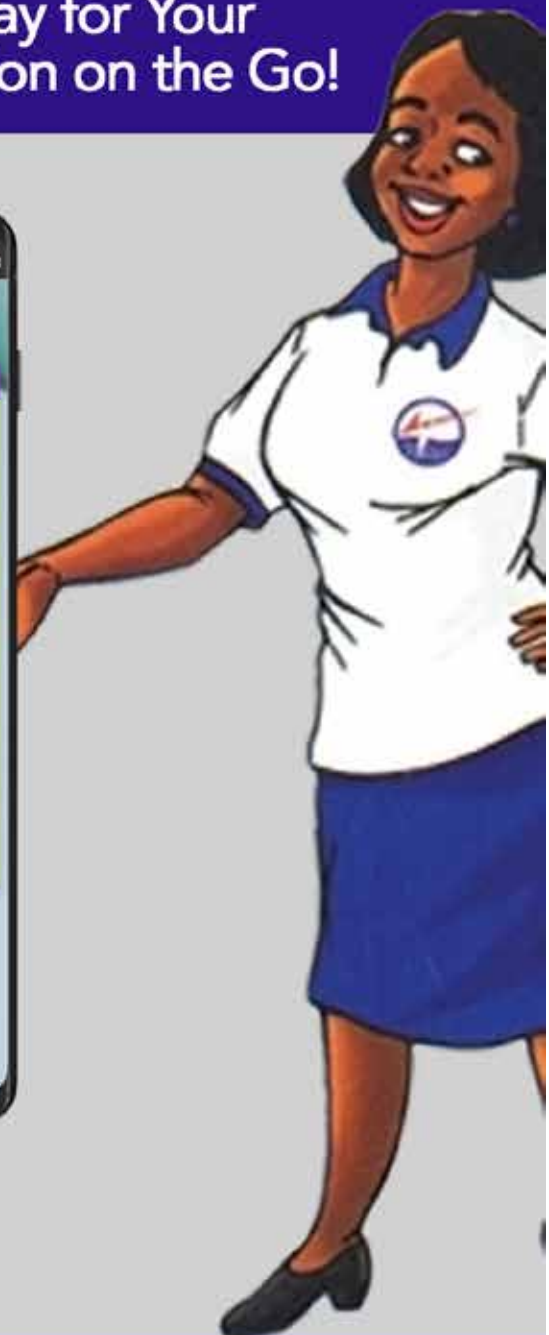
Water Charge (GHS):

Levies (GHS):

Service Charge (GHS):

Total Amount (GHS):

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Diversity Factor (%):	100%	▼ <input type="checkbox"/> Apply
Monthly Electricity Consumption (kWh):	0.6	
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	<input type="button" value="CLEAR"/>	

	
LED Bulb	Iron
1	1
ON	OFF
Appliance Rating (W): 10	Appliance Rating (W): 1200
Duration of use (h): 2 hours a day	Duration of use: 1 hour a week

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