# MYSTERY SHOPPING STUDY OF THE UTILITY SERVICE PROVIDERS 2022

**Prepared for:**

Office of Utilities Regulation
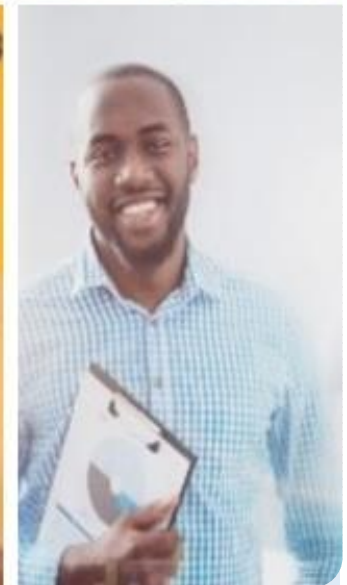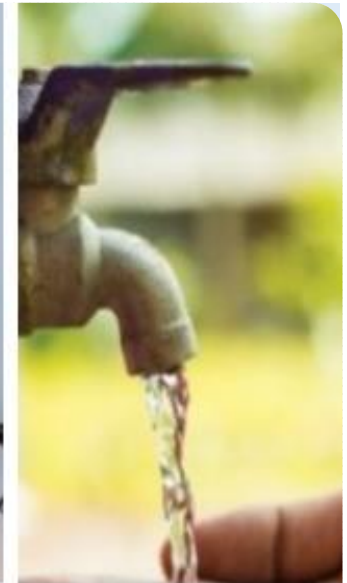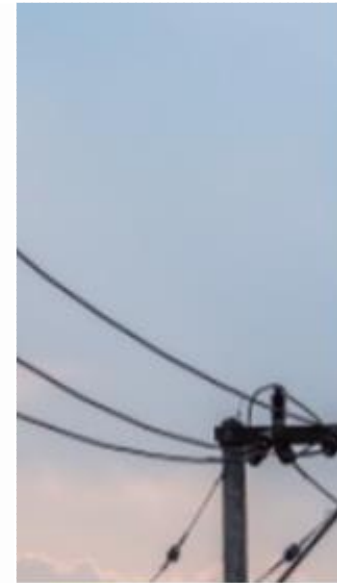
**A Report/Presentation by:**

**Market Research Services Limited** (Est.1975)

**16 Cargill Avenue
Kingston 10**

**"Always asking questions, Always providing Answers"**

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# Introduction & Background To The Study

The Office of Utilities Regulation ("OUR") is a corporate body established under the Office of Utilities Regulation Act to regulate the provision of prescribed utility services in Jamaica. "Prescribed utility services" refer to the generation, transmission, distribution and supply of electricity, the provision of telecommunications services, the supply and distribution of water and the provision of sewerage services.

As regulator, the OUR's role includes determining the regulatory framework within which the regulated entities operate as well as setting the utility service rates and standards for some of these entities. In carrying out this role, the OUR must ensure that it takes into account the needs of all relevant stakeholder groups which includes the Government of Jamaica, the utility service providers and its largest stakeholder group - the consumers of these utility services.

In order to honor this role, the OUR decided to embark on an annual mystery shopping program designed to monitor the service level that is delivered by the various service providers. Market Research Services Ltd. (MRSL) was the agency selected to complete the study.

This document represents MRSL's management report of the findings.

# Methodology

The mystery shopping involved the selection of a range of different persons across all demographic groups who visited, made calls to and participated in online chats with the various stores, call centres and chat rooms of the different utility companies respectively. Each Shopper was given a specific scenario to "shop" including:

**Telecoms:** Enquiring about internet, Bill Payment IVR, Bill Payment App., Refund Process

**JPS:** Bill Estimate, Service Application, Upgrade in Deposit, Refund Process

**NWC:** Water Schedule, Water Billing, Refund Process

Shoppers remained anonymous throughout the process. In order to achieve this, they had to ensure that they were fully apprised of the data collection tool and the key areas to check for.

Shoppers comprised both males and females and persons across the age spectrum. No single shopper was allowed to shop more than one location for the same company during the time of the study. This was an important quality control measure in order to ensure that their previous experience with another location did not influence their thoughts for the other.

Visits and calls were done during both the typical peak (busy) and off-peak (less busy) period determined by dates. The dates for peak visits and calls were February 25, 2022 to March 11, 2022.

# Methodology Cont'd.

In the case of the shops by visits, shoppers evaluated both the service delivered by the Customer Service Representative as well as the facilities and measures in place for safeguarding against COVID-19.

The data collection tool was an electronic one with specific questions about their experience. A numeric scoring method was used allowing equal weight to each question asked. Therefore, each positive answer yielded a score of five (5) while its negative answer yielded a score of zero (0). In the final analysis the sum of scores method was used to determine the location's customer service performance.

# "Shops" Description

|  | Total Calls | Total Visits | Total Chats |
|---|---|---|---|
| Flow | 6 | 31 | 12 |
| Digicel | 6 | 27 | 6 |
| JPS | 6 | 17 | 6 |
| NWC | 6 | 14 | 6 |

# Changes To The Tool

The 2022 tool featured changes that allowed for a more probing evaluation. In the 2022 evaluation a wider range of scenarios were implemented. These were specific to the different utility companies and applied equally across the different service modalities (in store, call centre, web chat). These changes have resulted in a new baseline set of results that are not comparable to the other years. This became necessary due to the changes that came with COVID and the resultant change in customers' experiences when dealing with the utilities.

# Summary Findings

# THE UTILITIES' PERFORMANCE IN TOTAL CUSTOMER EXPERIENCE (In Store, Call Centre & Online Chats)

|  | TOTAL SCORE | PEAK | OFF-PEAK |
|---|---|---|---|
| FLOW | 38% | 38% | 37% |
| DIGICEL | 55% | 52% | 59% |
| JPS | 56% | 57% | 54% |
| NWC | 45% | 47% | 40% |
| **AVERAGE SCORE** | **49%** | **49%** | **48%** |

THE ABOVE SCORES REPRESENT AN AVERAGE OF THE INSTORE SCORE, THE CALL CENTRE & ONLINE CHATS WITH A COMPARATIVE VIEW OF SCORES OBTAINED DURING PEAK AND OFF PEAK PERIODS.

# THE UTILITIES' PERFORMANCE IN TOTAL CUSTOMER EXPERIENCE (IN STORE)

| | TOTAL SCORE 2022 | PEAK TIME | OFF-PEAK TIME |
|---|---|---|---|
| FLOW | 64% | 60% | 69% |
| DIGICEL | 59% | 58% | 61% |
| JPS | 60% | 45% | 88% |
| NWC | 63% | 67% | 58% |
| AVERAGE | 62% | 58% | 69% |

THE ABOVE SCORES REPRESENT TOTAL SCORE OBTAINED FOR BOTH CUSTOMER SERVICE AND THE PHYSICAL SPACE WITH A COMPARATIVE VIEW OF SCORES OBTAINED DURING PEAK AND OFF-PEAK PERIODS.

# THE UTILITIES' PERFORMANCE IN TOTAL CUSTOMER EXPERIENCE (CALL CENTRE) 2022

|  | TOTAL SCORE | PEAK TIME | OFF-PEAK TIME |
|---|---|---|---|
| FLOW | 46% | 46% | 50% |
| DIGICEL | 61% | 54% | 60% |
| JPS | 89% | 100% | 67% |
| NWC | 57% | 48% | 61% |
| **AVERAGE** | 63% | 62% | 60% |

# THE UTILITIES' PERFORMANCE IN TOTAL CUSTOMER EXPERIENCE (ONLINE CHAT) 2022

|  | TOTAL SCORE | PEAK TIME | OFF-PEAK TIME |
|---|---|---|---|
| FLOW | 8% | 15% | 0% |
| DIGICEL | 46% | 46% | 55% |
| JPS | 21% | 25% | 6% |
| NWC | 17% | 25% | 0% |
| AVERAGE | 23% | 28% | 15% |

# COVID MEASURES IN STORE (PEAK AND OFF-PEAK) 2022

|  | TOTAL SCORE | PEAK TIME | OFF-PEAK TIME |
|---|---|---|---|
| FLOW | **67%** | **64%** | **76%** |
| DIGICEL | **62%** | **62%** | **59%** |
| JPS | **59%** | **50%** | **89%** |
| NWC | **64%** | **60%** | **66%** |
| **AVERAGE** | **63%** | **59%** | **73%** |