

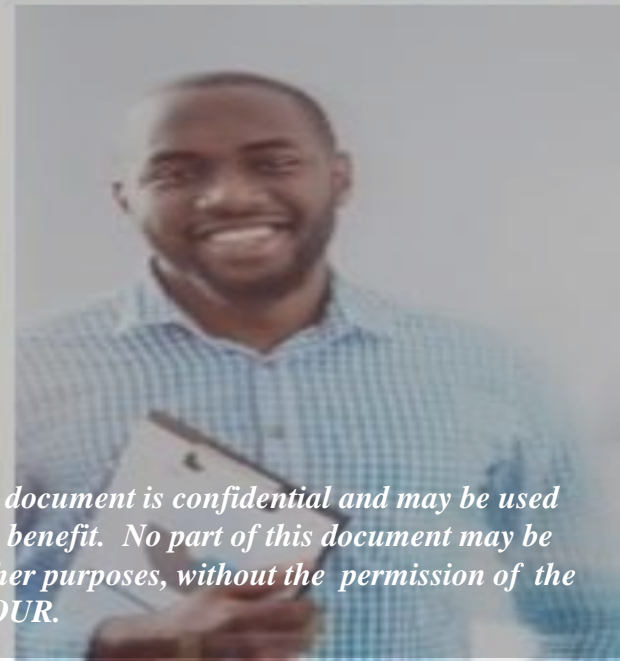
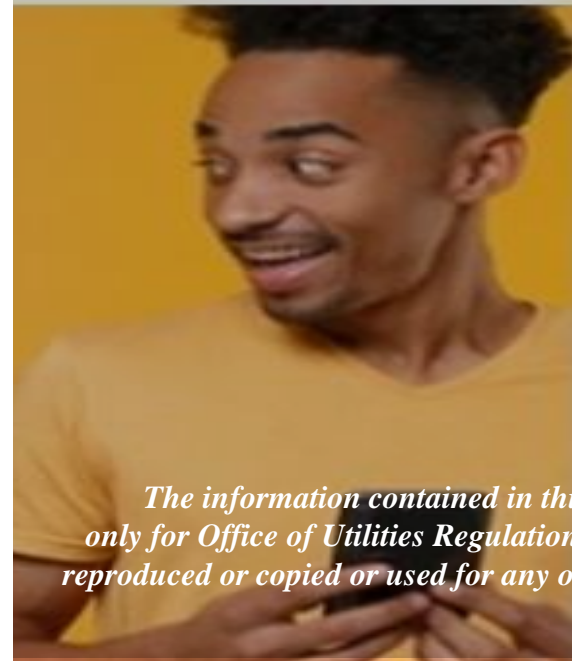
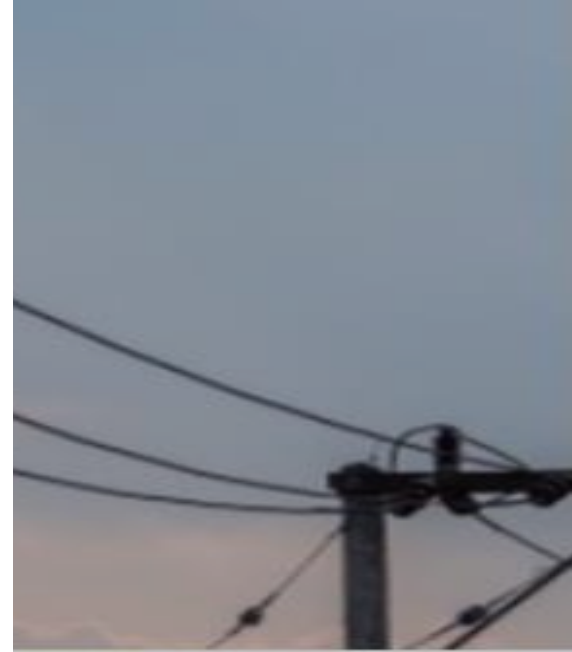


MYSTERY SHOPPING STUDY OF THE UTILITY SERVICE PROVIDERS 2023

A Report/Presentation by:



“Always asking questions, Always providing Answers”



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Contents



03 | **Background & Methodology**

06 | **Summary, Conclusions & Recommendations**

A hand holding a pen over a document with a checklist. The document has several rows of text, each starting with a square checkbox. The background is a dark blue gradient.

Background & Methodology

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 and off-peak and calls were March 24 2023 to April 9th and April 10, 2023 to April 24th 2023 respectively.

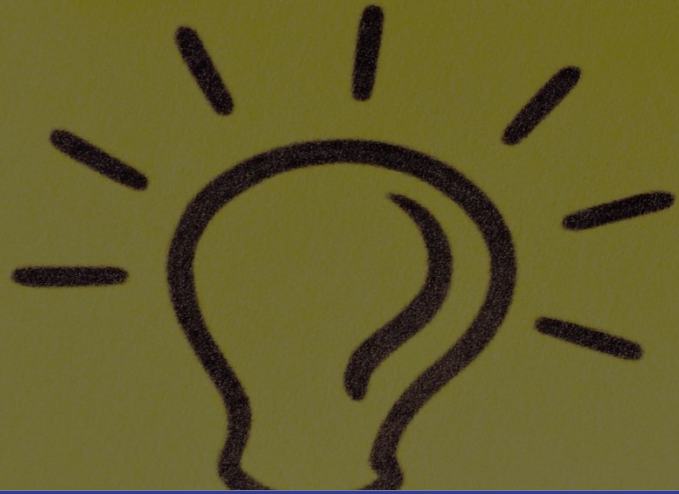
Methodology Cont'd.

In the case of the shops by visits, shoppers evaluated both the service delivered by the Customer Service Representative as well as the maintenance and care of the facilities.

The data collection tool was an electronic one with specific questions about their experience. The final overall score is a weighted average score with natural weighting occurring based on the scenario shopped and the number of legitimate questions.

Addition to the Scope

The 2023 study featured inclusion of the social media platforms of FaceBook, Twitter, Instagram and Mobile Apps for each of the service provider where these modalities are accessible to customers. This became necessary due to the greater push towards digital as a consumer access point.



Summary of Key Finding!

THE UTILITIES' PERFORMANCE IN TOTAL CUSTOMER EXPERIENCE (In Store, Call Centre, Website Chats, Social Media & Mobile App)

	TOTAL SCORE	PEAK	OFF-PEAK
FLOW	65%	58%	71%
DIGICEL	59%	56%	61%
JPS	55%	53%	58%
NWC	43%	43%	42%
AVERAGE SCORE	54%	53%	59%

THE ABOVE SCORES REPRESENT AN AVERAGE (MEAN) OF THE INSTORE SCORE, THE CALL CENTRE & ONLINE CHATS (CHAT BOT AND MOBILE APP) WITH A COMPARATIVE VIEW OF SCORES OBTAINED DURING PEAK AND OFF-PEAK PERIODS. THERE IS NO COMPARATIVE SCORE FOR 2022 AS SOCIAL MEDIA AND MOBILE APP WERE NOT INCLUDED IN THAT STUDY.

CONCLUSION & RECOMMENDATION

Conclusion Summary

- All things considered, utility service providers are delivering all together a mediocre level of service to customers, obtaining an average score of 54% across all channels.
- There is not a meaningful difference in the level of service being delivered in the peak (53%) versus off peak (59%) times.
- There appears to be a real need for service providers to zero in on their customer experience with the service being delivered by their staff in all areas.
- It is to be noted that while some providers perform better in some channels than others, as a category (utility services) there is much room for improvement.
- These results may be used by the OUR to highlight the areas of strengths and weaknesses as well the areas for immediate focus for the relevant players in this high demand industry.
- It is clear from these findings that some providers have made much effort to address the weak areas coming out of the last study and this is very evident in the change in some of the scores obtained this year. This type of response must be encouraged across all service providers.
- Finally, with only 54% overall score, service providers still have a huge gap to fill to get to the target best practice of 80%.

Issues/Opportunities and Recommendations

Issues and Opportunities Summary - Overall

- The NWC delivers the best overall score in the Call Centre service channel, 87%, followed by JPS (80%), FLOW (74%) and Digicel (53%).
- The NWC reported improvements across all scenarios evaluated via the Call Centre channel especially in the scenarios of water schedule and the refund process.
- Service delivery in the Branch or face-to-face channel is led by the JPS (75%), followed by FLOW (64%), NWC (61%) and Digicel (56%).
- Significant improvements were observed for JPS' in Branch service channel in nearly all scenarios evaluated except for upgrading deposits. Areas in which outstanding improvements were noted include professional attire, the greetings by representatives, and the provisions for persons with special needs.
- FLOW (74%) comes out on top for online chats via the website, followed by JPS (57%), and Digicel (51%). The NWC delivers 0% for its website interactions with customers.
- All providers perform poorly the interactions via social media. Flow delivers best in this channel with a score of 43%, followed by Digicel (33%), JPS (28%), and NWC (23%). Flow's social media performance is bolstered by its Facebook performance (53%).
- Digicel (100%) delivers best overall in the mobile app service channel. They are followed by Flow (50%) and JPS (33%).

Issues/Opportunities and Recommendations

Issues and Opportunities Summary - FLOW

- The main area of focus for improvement for Flow coming out of this study is in its Call Centre service channel especially with regards to its handling of queries regarding the refund process and bill payment using the mobile app. Flow representatives were reported to underperform especially in the courtesies displayed to customers when transferring them to other departments for help.
- With regards to the In-store service channel, Flow underperforms in the provision of services for persons with special needs and giving the customer access to a manager/supervisor when they needed additional assistance.
- Flow generally performs better than other providers across all social media channels.

Issues and Opportunities Summary - Digicel

- Digicel's performance in the Call Centre service channel declined across all scenarios evaluated except with regards to queries about bill payment using IVR. The main area in which Digicel consistently fails is in the courtesies displayed to customers when addressing their queries including opening and closing pleasantries.
- Additional attention is needed to ensure representatives fully explain to customers the alternatives available to them to make bill payments outside of the IVR.
- Digicel's Branch service delivery could improve with additional attention to services for persons with special needs and access to the manager/supervisor when the need arises.
- Digicel performs best in the digital space through its mobile app. but underperforms in the social media space via Twitter.

Issues/Opportunities and Recommendations

Issues and Opportunities Summary - JPS

- JPS was reported to deliver excellently in the general /core service areas during interactions via the Call Centre service channel. JPS representatives are however weak in responding to customers' needs in the more targeted areas.
- More specifically, there is a need for JPS to focus on training representatives to deliver better service when addressing customers' concerns with regards to bill estimates, service applications, prepaid meter queries, upgrade in deposits, and the refund process.
- The JPS performs much better in the Branch or face-to-face service channel and delivers the best results across all providers in this area.
- The JPS should investigate how to improve its interactions in the social media space especially via Instagram.
- JPS' performance in its Mobile App deserves great attention as well for both bill payment and bill balance enquiry where it achieved a score of 43% and 29% respectively.

Issues and Opportunities Summary – NWC

- The NWC delivers best above all service providers in the Call Centre service channel. This was achieved by a notable improvement in the service delivered by its representatives across all the scenarios evaluated and was especially outstanding in queries related to water schedule.
- The NWC recorded a stable performance in its Branch or face-to-face service channel as well.
- There is an important need however for the NWC to pay close attention to its service delivery in the digital space. This is especially critical as customers are being encouraged to rely more on digital platforms for interacting with NWC. NWC was the weakest performer in all scenarios evaluated in the digital space via social media.
- The NWC performed weakest in its Facebook interactions with its customers.