



MYSTERY SHOPPING STUDY OF THE UTILITY SERVICE PROVIDERS 2024

A Report/Presentation by:



“Always asking questions, Always providing Answers”

Submitted: January 9, 2025

The information contained in this document is confidential and may be used only for Office of Utilities Regulations benefit. No part of this document may be reproduced or copied or used for any other purposes, without the permission of the OUR.

Contents



03 | Background & Methodology

06 | Summary of Key Findings

A close-up photograph of a hand holding a black pen, poised to write on a notebook. The notebook has a grid pattern and some faint, illegible text. The background is dark and out of focus. A white horizontal bar is overlaid at the bottom of the image, containing the text 'Background & Methodology'.

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. There were a total of two hundred and forty (240) interactions (see overleaf for summary). Each Shopper was given a specific scenario to “shop” . These scenarios were determined by the OUR based on its knowledge of and reports about providers services and offerings.

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 peak period occurred from the 25th of the current month to the 7th of the upcoming month while the off-peak periods occurred from the 8th of the month to the 24th.

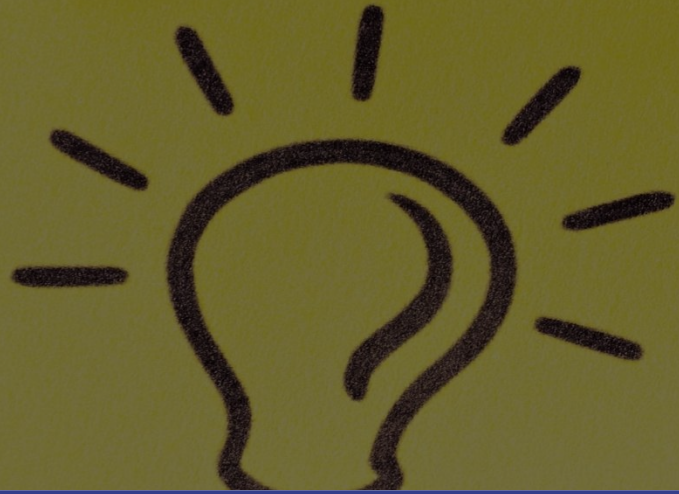
The data collection for this Mystery Shopping started August 2024 and ended October 2024. Peak Period visits were carried out during the periods August 25th to September 7th, September 25th to October 7th while Off-Peak period visits were carried out during August 13th to August 24th, September 8th to September 24th and October 8th to October 9th

Summary Interactions

The data collection for this Mystery Shopping started August 13th 2024 and ended October 9th 2024.

	Total Calls	Total Visits	Total Digital	Total Chats (Website)	Total Chats (Social Media)	Total Mobile App
Flow	12	18	26	6	18	2
Digicel	10	26	22	5	15	2
JPS	14	10	32	7	21	4
NWC	12	30	28	6	18	4
Total	48	84	108	24	72	12

240 INTERACTIONS ACROSS ALL CUSTOMER TOUCHPOINTS



Summary of Key Finding!

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

	TOTAL SCORE			PEAK TIME			OFF-PEAK TIME		
	2023	2024	Change	2023	2024	Change	2023	2024	Change
FLOW	65%	70%	+5	58%	78%	+20	71%	62%	-9
DIGICEL	59%	64%	+5	56%	62%	+6	61%	67%	+6
JPS	55%	70%	+15	53%	67%	+14	58%	72%	+14
NWC	43%	58%	+15	43%	60%	+17	42%	55%	+13
AVERAGE	54%	66%	+12	53%	66%	+13	59%	64%	+5

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.

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

	TOTAL SCORE			PEAK TIME			OFF-PEAK TIME		
	2023	2024	Change	2023	2024	Change	2023	2024	Change
FLOW	74%	89%	+15	78%	93%	+15	71%	85%	+14
DIGICEL	53%	82%	+29	60%	84%	+24	43%	81%	+38
JPS	80%	78%	-2	79%	71%	-8	81%	84%	+3
NWC	87%	57%	-30	88%	49%	-39	85%	65%	-20
AVERAGE	74%	77%	-3	76%	73%	-3	70%	79%	+9

THE ABOVE SCORES REPRESENT AN AVERAGE (MEAN) OF THE CALL CENTRE SCORES WITH A COMPARATIVE VIEW OF SCORES OBTAINED DURING PEAK AND OFF-PEAK PERIODS.

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

	TOTAL SCORE			PEAK TIME			OFF-PEAK TIME		
	2023	2024	Change	2023	2024	Change	2023	2024	Change
FLOW	64%	62%	-2	68%	67%	-1	59%	57%	-2
DIGICEL	56%	46%	-10	53%	51%	-2	58%	41%	-17
JPS	75%	78%	+3	76%	78%	+2	75%	77%	+2
NWC	61%	65%	+4	62%	68%	+6	60%	62%	+2
AVERAGE	64%	63%	-1	65%	66%	+1	63%	59%	-4

THE ABOVE SCORES REPRESENT AVERAGE (MEAN) SCORE OBTAINED FOR IN-STORE VISITS 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 (ONLINE/DIGITAL)

	TOTAL SCORE	PEAK - TIME	OFF-PEAK
	2024	2024	2024
FLOW	59%	74%	45%
DIGICEL	65%	50%	79%
JPS	54%	51%	56%
NWC	52%	64%	37%
AVERAGE	58%	60%	54%

THE ABOVE SCORES REPRESENT AVERAGE (MEAN) SCORE OBTAINED FOR ALL PROVIDERS.

THE UTILITIES' PERFORMANCE IN TOTAL CUSTOMER EXPERIENCE (DIGITAL – WEBSITE CHAT)

	TOTAL SCORE			PEAK TIME			OFF-PEAK TIME		
	2023	2024	Change	2023	2024	Change	2023	2024	Change
FLOW	74%	50%	-24	68%	50%	-18	83%	50%	-33
DIGICEL	51%	70%	+19	39%	69%	+30	61%	71%	+10
JPS	57%	68%	+11	50%	75%	+25	67%	64%	-3
NWC	0%	80%	+80	0%	85%	+85	0%	67%	+67
AVERAGE	46%	67%	+21	39%	70%	+31	53%	63%	+10

THE ABOVE SCORES REPRESENT AVERAGE (MEAN) SCORE OBTAINED FOR ONLINE CHAT VIA THE WEBSITE CHATBOT WITH A COMPARATIVE VIEW OF SCORES OBTAINED DURING PEAK AND OFF-PEAK PERIODS.

THE UTILITIES' PERFORMANCE IN TOTAL CUSTOMER EXPERIENCE (DIGITAL – SOCIAL MEDIA)

	TOTAL SCORE			PEAK TIME			OFF-PEAK TIME		
	2023	2024	Change	2023	2024	Change	2023	2024	Change
FLOW	43%	55%	+12	44%	74%	+30	42%	34%	-8
DIGICEL	33%	58%	+25	27%	38%	+11	42%	78%	+36
JPS	28%	47%	+19	29%	44%	+15	31%	50%	+19
NWC	23%	30%	+7	22%	47%	+25	24%	12%	+12
AVERAGE	32%	48%	+16	31%	51%	+20	35%	44%	+9

THE ABOVE SCORES REPRESENT AVERAGE (MEAN) SCORE OBTAINED FOR ONLINE CHAT VIA SOCIAL MEDIA WITH A COMPARATIVE VIEW OF SCORES OBTAINED DURING PEAK AND OFF-PEAK PERIODS.

THE UTILITIES' PERFORMANCE IN TOTAL CUSTOMER EXPERIENCE (DIGITAL - MOBILE APP)

	TOTAL SCORE			PEAK TIME			OFF-PEAK TIME		
	2023	2024	Change	2023	2024	Change	2023	2024	Change
FLOW	71%	100%	+29	33%	100%	+67	100%	100%	0
DIGICEL	100%	71%	-29	100%	43%	-57	100%	100%	0
JPS	36%	68%	+32	33%	64%	+31	36%	71%	+35
NWC	n/a	100%	-	n/a	100%	-	n/a	100%	-
AVERAGE	69%	85%	+16	55%	77%	+22	79%	93%	+14

THE ABOVE SCORES REPRESENT AVERAGE (MEAN) SCORE OBTAINED FOR ONLINE CHAT VIA THE MOBILE APP WITH A COMPARATIVE VIEW OF SCORES OBTAINED DURING PEAK AND OFF-PEAK PERIODS.