

Public

Switched On! 2018 customer survey results

Key background & themes

- 571 customers were invited to complete a short annual, online/phone quantitative survey, with 75 responses completed, compared to 165 responses in 2017. Fieldwork was conducted in November/December rather than September as last year or June/July previously.
- The proximity to the festive period resulted in a notably lower response, but the profile of the sample in terms of company type, role and length of relationship with ELEXON was consistent with previous years.
- Overall the results indicate a **period of steady performance**, and **striving for improvement**.
- **Quality and reliability of service** remains the biggest priority for participants in an environment where many feel under pressure to keep up with the pace of change.
- Overall **satisfaction** and perceived **value for money** remain steady, but **net recommendation** has shown a strong recovery. Perceptions have improved most with larger energy companies and those working in regulatory affairs.
 - **Key positives** remain similar – professional, knowledgeable, helpful, well organised, responsive
 - **Main negatives** raised (by a small minority from a very small sample set) – a desire for better support/service and more forward thinking on how to deliver value

Further themes

- The sense that ELEXON is improving is the **highest in 7 years**, across BSC Parties, large and small, and especially newer parties, but not with supplier agents/others.
- Ratings for **keeping costs down, quality of communication** and **facilitating industry debate** – have improved, and especially with large energy companies.
- Some express a desire for ELEXON to engage more, improve and review processes, communicate even more proactively and make greater use of technology.
- Feedback on the **website, portal** and **webinars** has improved (especially larger energy companies), with more now using webinars.
- Rating of the **OSMs**, the **Performance Assurance Processes** and the **BSC Service Desk** has dipped, especially with large energy companies and suppliers agents/others.
- The most valued ELEXON activities are its provision of **expertise, industry support, guidance** and being a **critical friend**. The Cross-code work plan and System Price Analysis Reports are the only services being valued less than previously.

Some guidance on interpretation

- Although **ALL** customers have been invited to participate in this survey, only a **sub-sample** of all customers actually complete it.
- Due to the small sample size, **one or two less positive comments** have had an impact on the results but have been reported for completeness.
- Some movement in results over time may therefore be purely due to **sampling variance** between years.
- At a **total sample** level, we would recommend treating movements of less than **+/-9%** with some caution unless they align with an expected outcome (e.g. enhancements to the website) as one or two not so positive comments has had an impact. When we look at sub-groups (e.g. larger energy companies) movements in results will need to be even bigger to be meaningful.

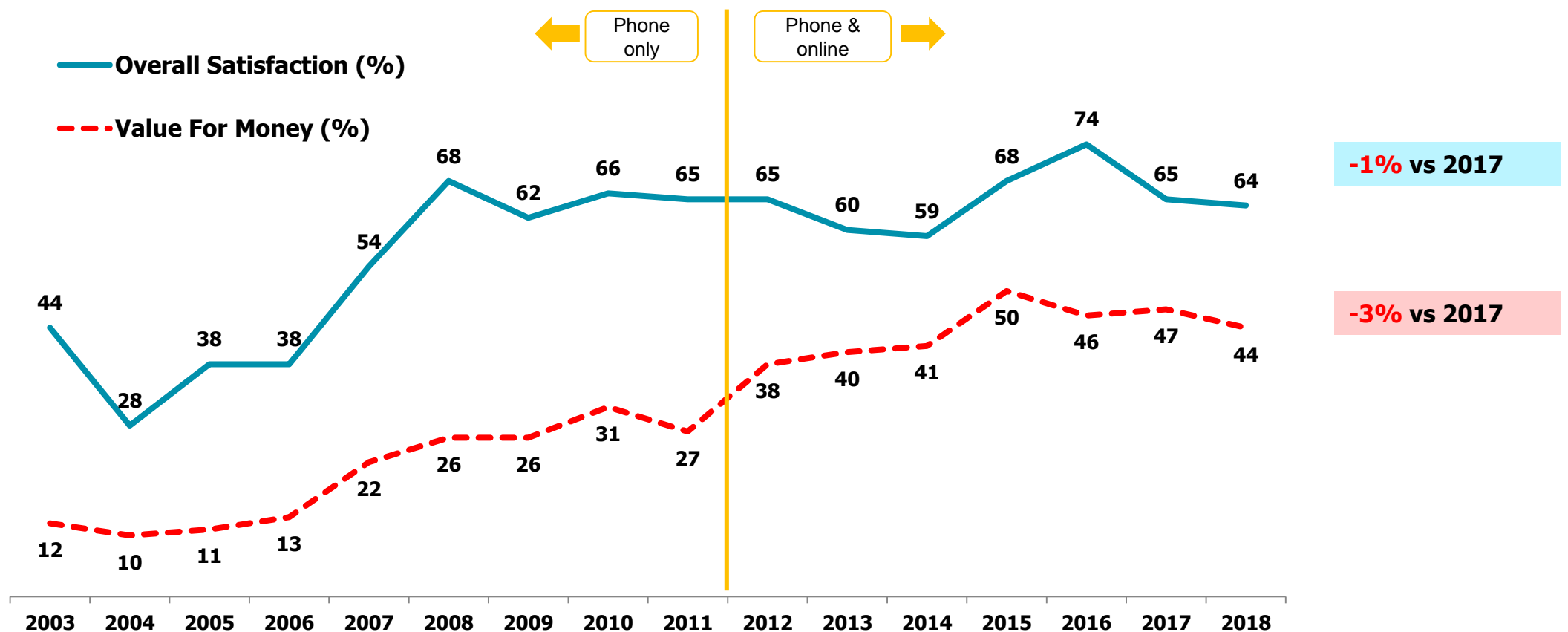
Sample group	Base size in 2018 sample	Sig. change YOY (80% confidence)	Sig. change YOY (95% confidence)
Total sample	75	+/- 9%	+/- 14%
Large energy companies	14	+/- 20%	+/- 28%
Other BSC Parties	36	+/- 13%	+/- 20%
Supplier Agents/Other	21	+/- 17%	+/- 24%
Ind.body/ Gov't	4	Qualitative only	

Overall satisfaction and value for money

SCORE 8+ (Out of 10)

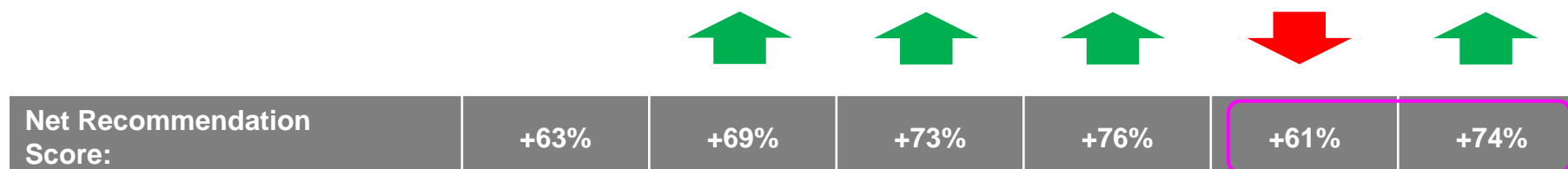
1 = Not at all satisfied/ 10 = Extremely satisfied

1 = Poor/ 10 = Excellent value for money



Overall satisfaction remains in line with 2017, but a further slight fall on value for money means it is down 6% on the peak in 2015.

Advocacy



%

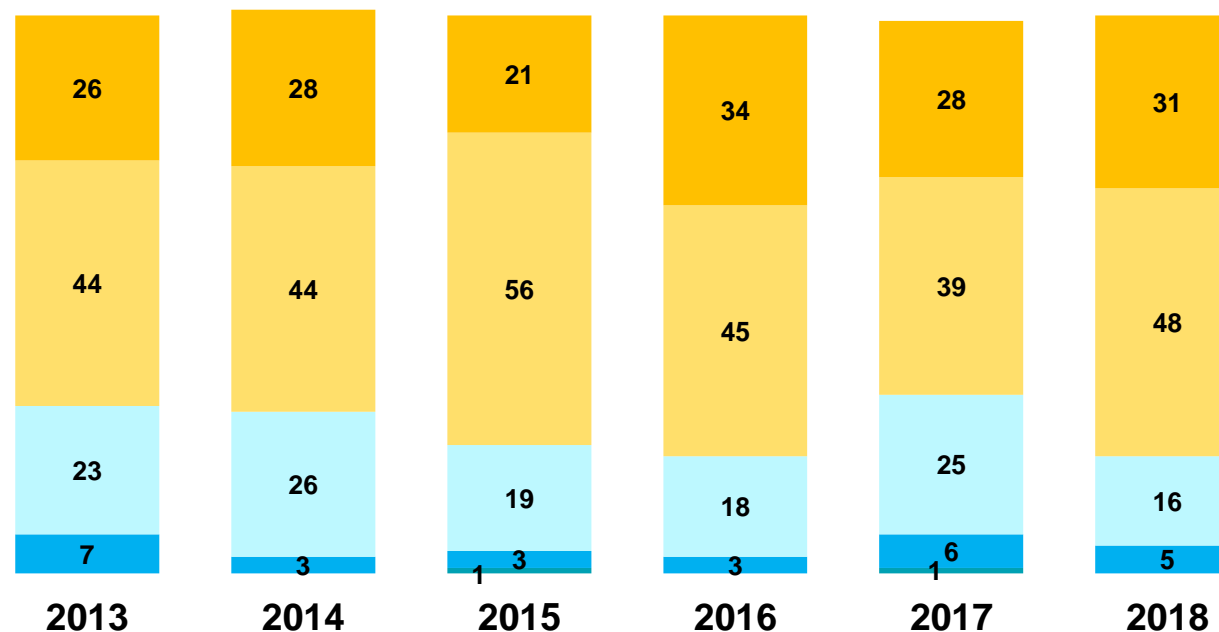
■ I would speak highly of them without being asked

■ I would speak highly of them if someone asked me

■ I would have no strong opinion either way

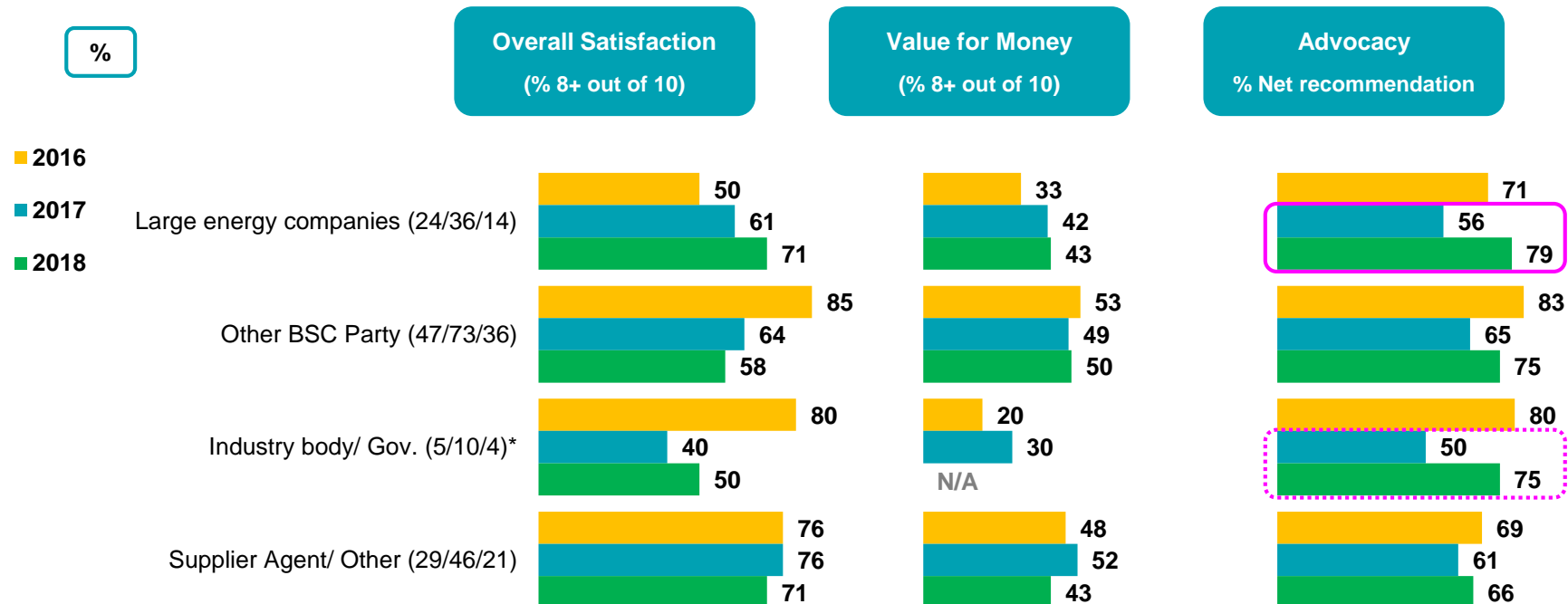
■ I would be critical of them if someone asked me

■ I would be critical of them without being asked



ELEXON's Net Recommendation score has recovered following the dip seen in 2017.

KPI by customer type



Directionally, there are signs of improved ratings with the larger energy companies and industry bodies, but more mixed results with other parties & agents.

Whether ELEXON's service has improved over past 12 months

%

***Net Improvement:**

+40%

+29%

+21%

+21%

+18%

+26%

+17%

+21%

+29%

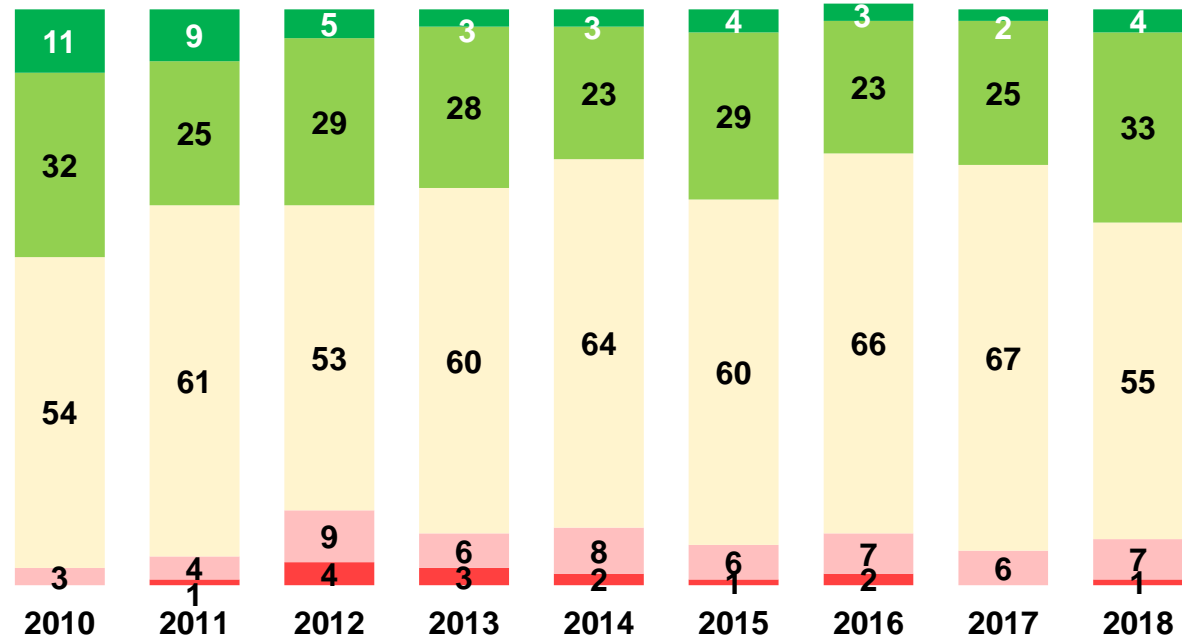
■ Improved a lot

■ Improved a little

■ Stayed the same

■ Got a little worse

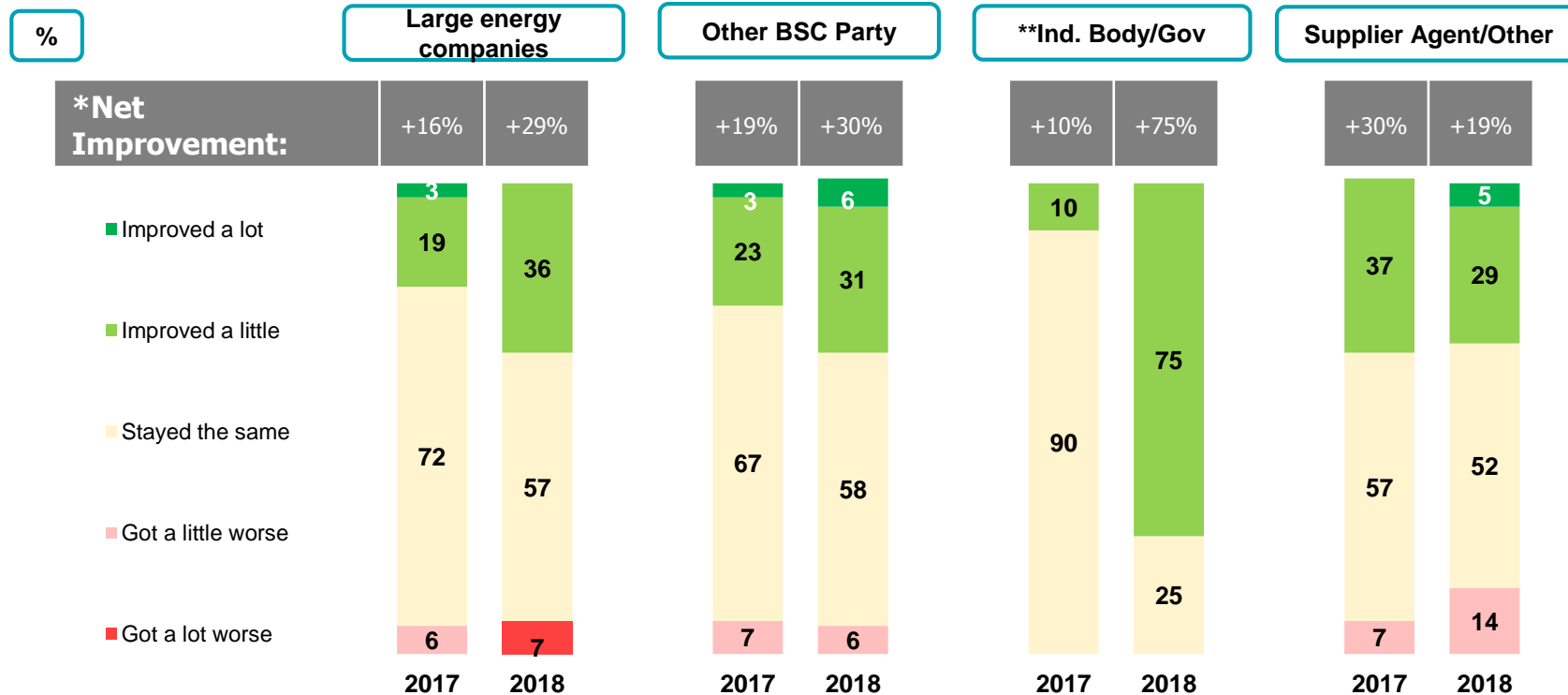
■ Got a lot worse



*Net improvement = % improved minus % got worse – an indicator of the 'sense' that ELEXON is improving

2018 has seen the strongest net improvement score since 2011.

Whether ELEXON's service has improved over past 12 months



*Net improvement = % improved minus % got worse – an indicator of the 'sense' that ELEXON is improving

The perceived net improvement has come more from parties and industry bodies than from supplier agents/others.

Areas for improvement – spontaneous feedback

While **64%** gave ELEXON a score of 8, 9, or 10 out of 10 for overall satisfaction
36% gave ELEXON a score of less than 8 out of 10.

67% of those have spontaneous suggestions for improvements:



Almost 1 in 5 would like to see ELEXON review and improve its processes.

Detailed attribute ratings

SCORE 8+ (Out of 10)
1 = Poor/ 10 = Excellent

%

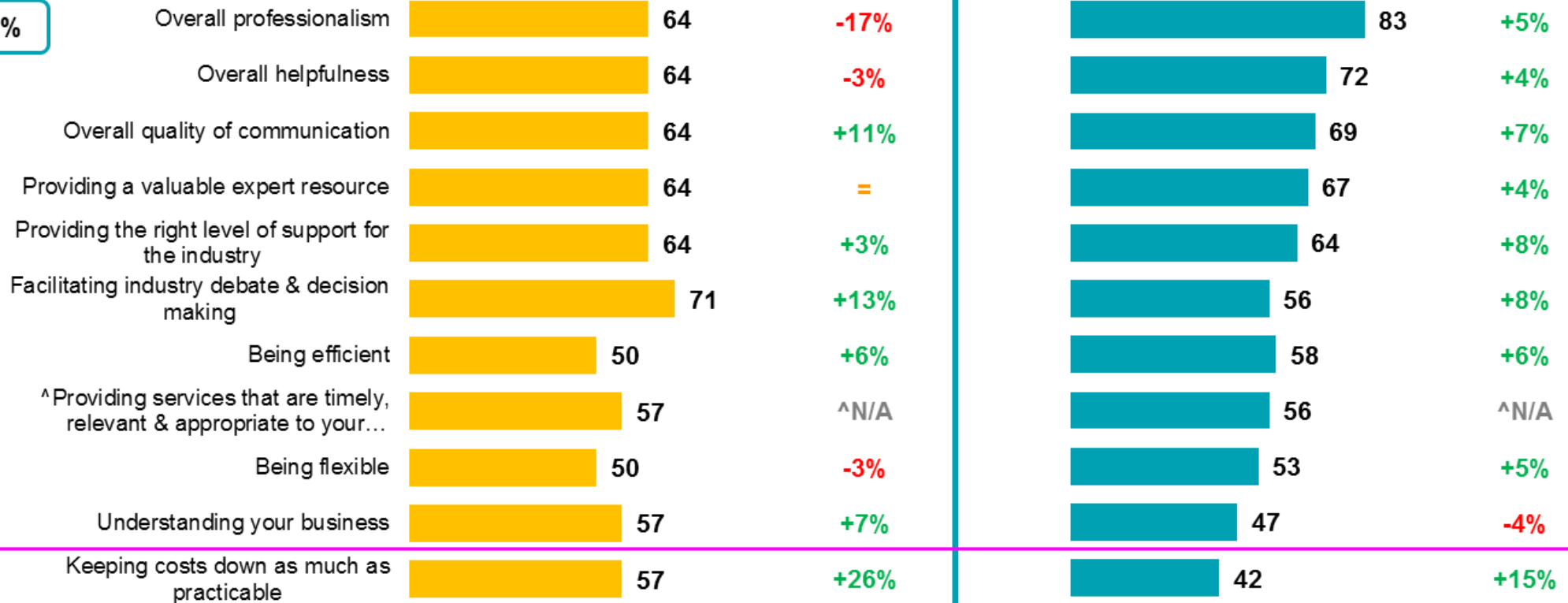
Large energy companies
of 14 respondents

Change vs.
2017

Other BSC party

of 36 respondents

Change vs.
2017



Supplier agents/others
of 21 respondents

Declines of 13% or more for expert resource, professionalism, flexibility & efficiency

Although the larger energy companies are rating professionalism less well, most other aspects are rated higher by them and other BSC Parties.

^attribute wording change for 2018 (added 'that are timely')

Overall rating of ELEXON service areas

SCALE 1 to 5
1 = Not At All Well/ 5 = Very Well

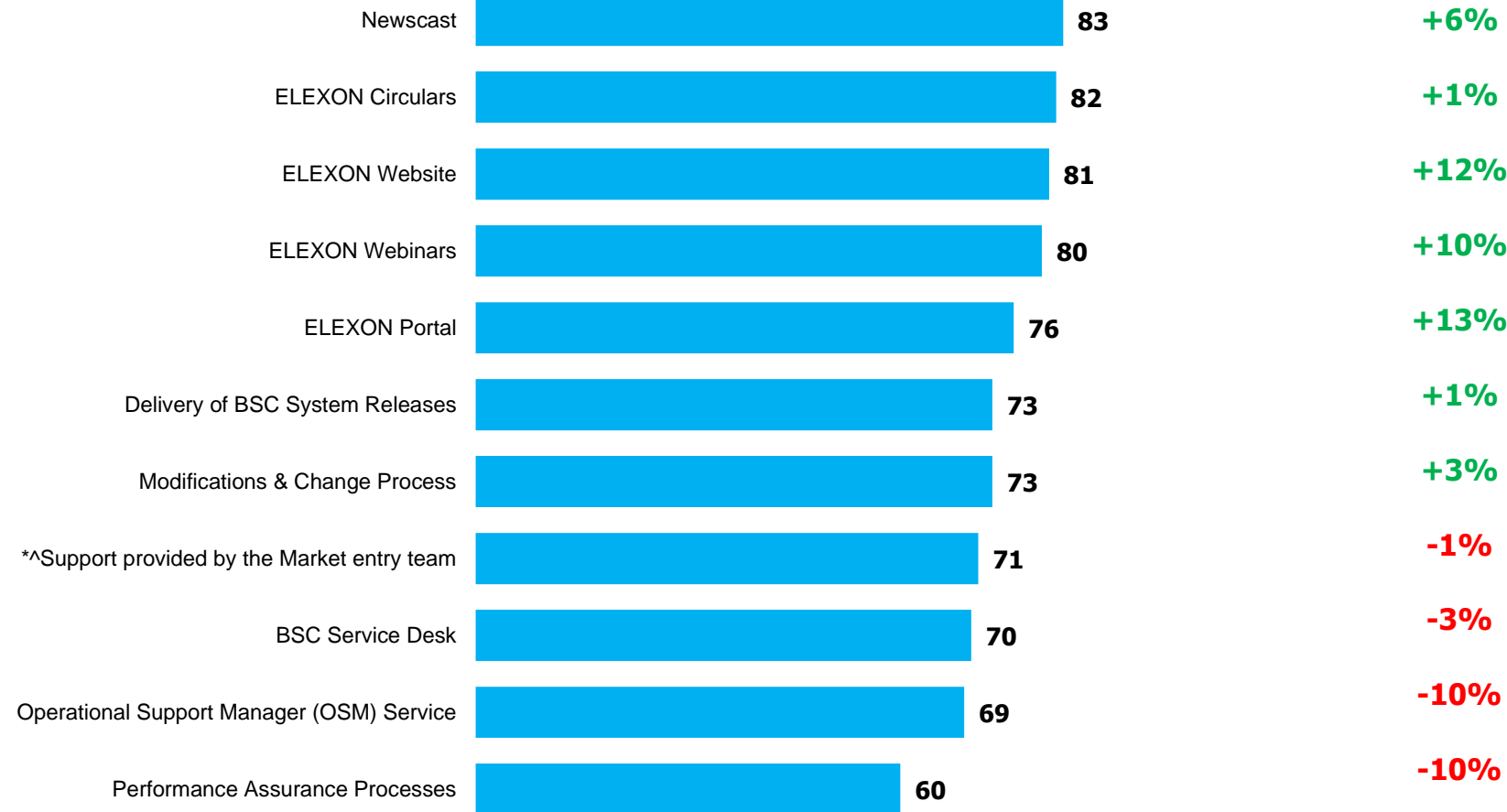
%

Top 2 Box
Score (4/ 5)

2018

Change versus

2017



^attribute wording change for 2018

* Caution: Low base size

Base: Those experienced service in past 12 months (various)

Detailed attribute ratings

SCALE 1 to 5
1 = Not At All Well/ 5 = Very Well

Top 2 Box
Score (4/ 5)

%

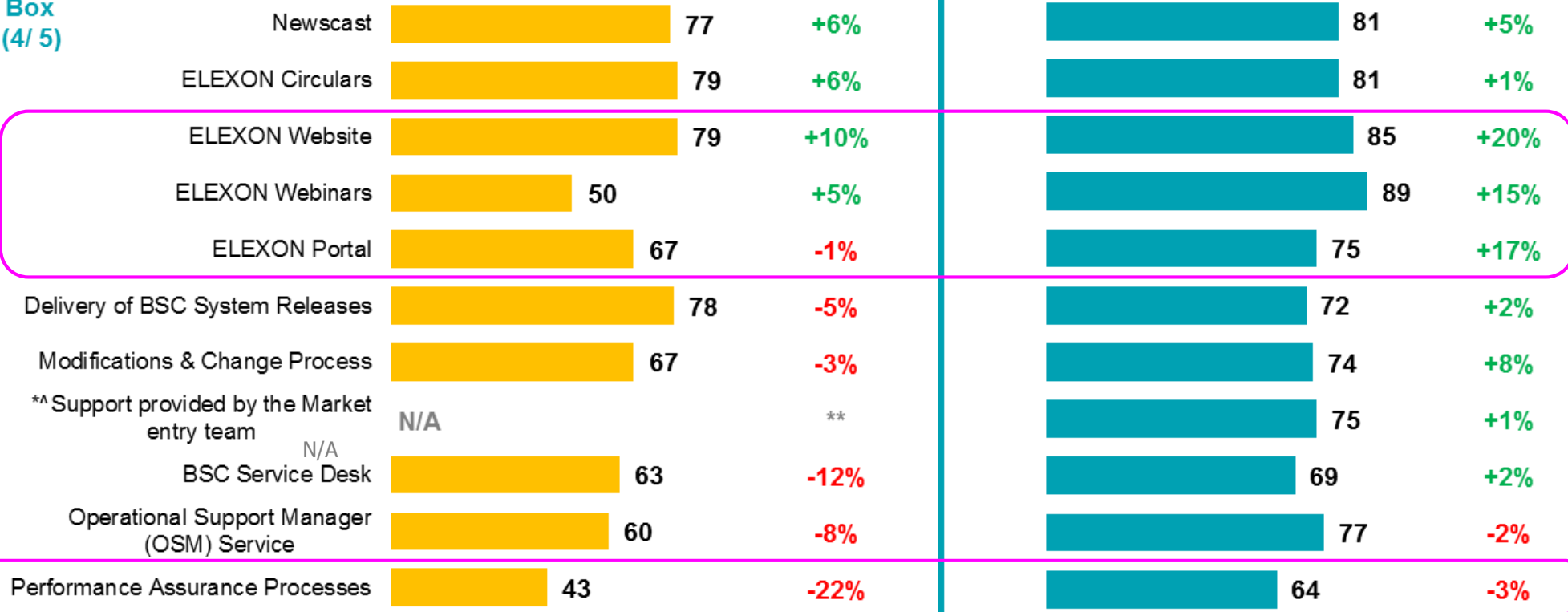
Large energy companies
of 14 respondents

Change vs.
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Other BSC party

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Change vs.
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Supplier agents/others
of 21 respondents

Increase of 19% for the Portal

Declines of 11% or more for OSMs, Performance Assurance Processes, Market Entry & Circulars

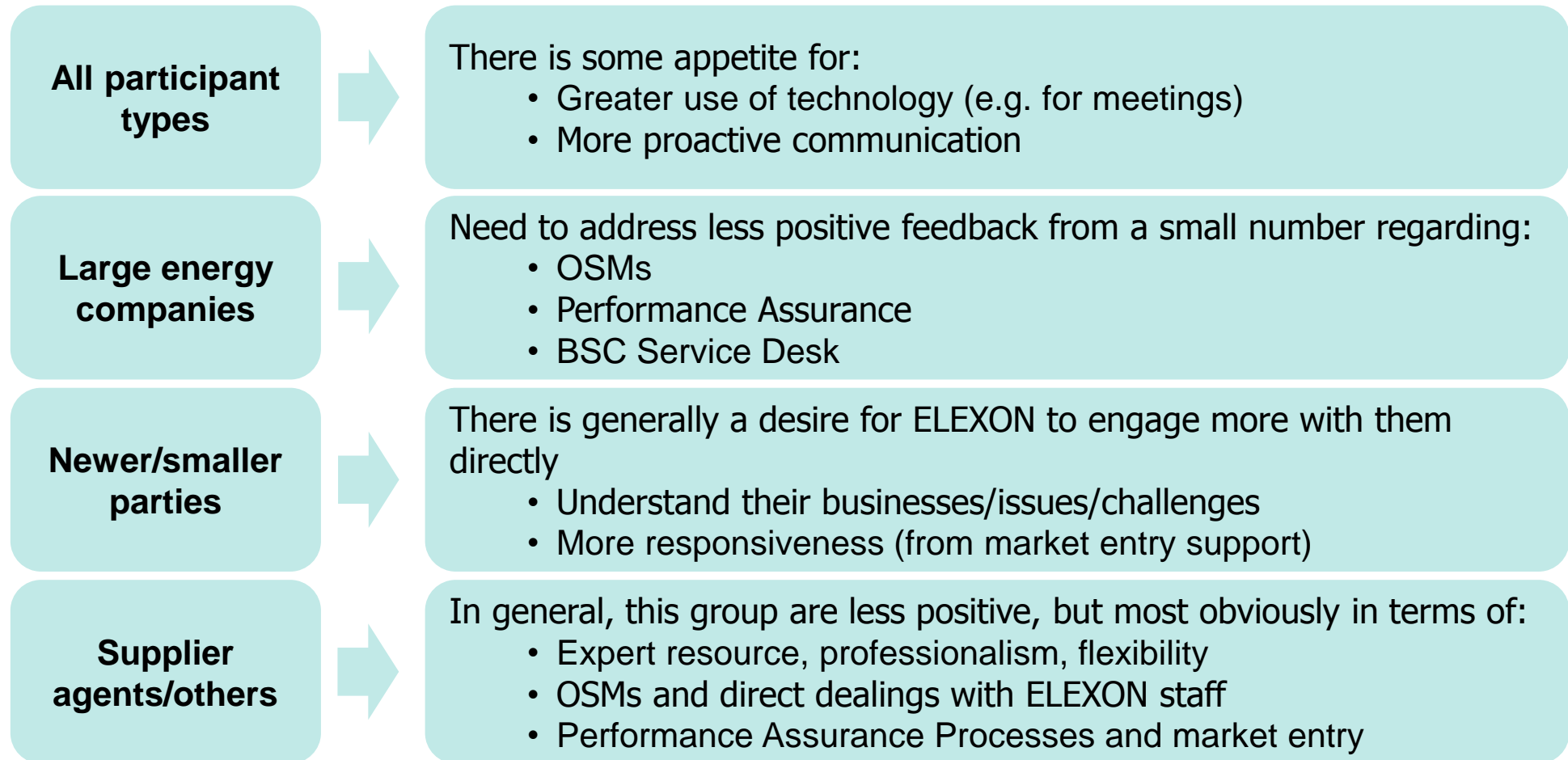
Lower scores for Performance Assurance Processes, OSMs and the BSC service desk are coming more from larger energy companies than other BSC Parties.

[^]attribute wording change for 2018

***CAUTION: Low Base Size (**too low to show trend)**

Next steps

Overall the results indicate a period of steady performance, and striving for improvement. 92% do not think ELEXON is getting worse, and 'net improvement' is the best in 7 years. There are still some opportunities to strengthen quality of service:





Thank you

ELEXON