2019 customer survey results

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Kate Norton/Jon Wilkins

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Key background & themes

- In order to ensure it remains as relevant and actionable as possible, this year's survey underwent its first major revamp since 2012. Comparability on our key measures has been maintained, but some changes in other areas were agreed.

- Changes included the creation of 'focused modules' enabling us to gain a deeper understanding of some specific aspects of ELEXON's business and services, as well as more detailed profiling of survey responders to give us more granular and actionable insights.

- The 2019 survey was completed by 112 customers or stakeholders of ELEXON from a list of 439 invited (52 online, 60 by phone). All fieldwork was conducted between Wednesday 25 September and Thursday 24 October 2019. NB: This is more responses than last year (75 completed surveys in 2018).

The main themes that emerged were…

- ELEXON's customers are diverse in size and experience, but they all value ELEXON most for its quality, reliability and expertise.

- Where we can compare directly with earlier years, there is a sense of improvement over the past 12 months.

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Further themes

- Comms channels are widely used and highly rated, but there is scope for improvement of the BSC service desk, portal and relevance of info/ updates.

- OSMs are receiving more positive feedback, with only 1 in 20 being critical. There is some appetite for more regular contact and understanding of their business.

- The majority feel that BSC change is delivered well, but simplified and more timely communication is desired by some.

- There is a general sense of improvement around PAF recently, but still a need to overcome perceived lack of transparency and scope to spread awareness of changes in the deployment of PAF.

- Awareness of The Foundation Programme is limited with only 1 in 4 knowing something. There is widespread interest in learning more, especially about the relevance of its benefits.

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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 (approximately 25%).

- With limited base sizes available for analysis, we need to be careful when drilling down into small minority groups. Very small groups (under 10) are therefore only reported as numbers of people, not percentages.

- 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. an improvement has been made to the service asked about). When we look at sub-groups (e.g. company size segments) movements in results will need to be even bigger to be meaningful.

Sample group	Base size in 2019 sample	Sig. change YOY (80% confidence)	Sig. change YOY (95% confidence)
Total sample	112	+/- 9%	+/- 13%
Small company	45	+/- 14%	+/- 21%
Medium-sized company	22	+/- 19%	+/- 28%
Large company	45	+/- 14%	+/- 21%
New market entrants	9	Qualitative only	

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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 (%)

- - - Value For Money (%)

Phone only ←

Phone & online →

Overall Satisfaction (%): 44%, 28%, 38%, 38%, 54%, 68%, 62%, 66%, 65%, 65%, 60%, 59%, 68%, 74%, 65%, 64%, 71%

Value For Money (%): 12%, 10%, 11%, 13%, 22%, 26%, 26%, 31%, 27%, 38%, 40%, 41%, 50%, 46%, 47%, 44%, 53%

+7% vs 2018

+9% vs 2018

2003 2004 2005 2006 2007 2008 2009 2010 2011 2012 2013 2014 2015 2016 2017 2018 2019
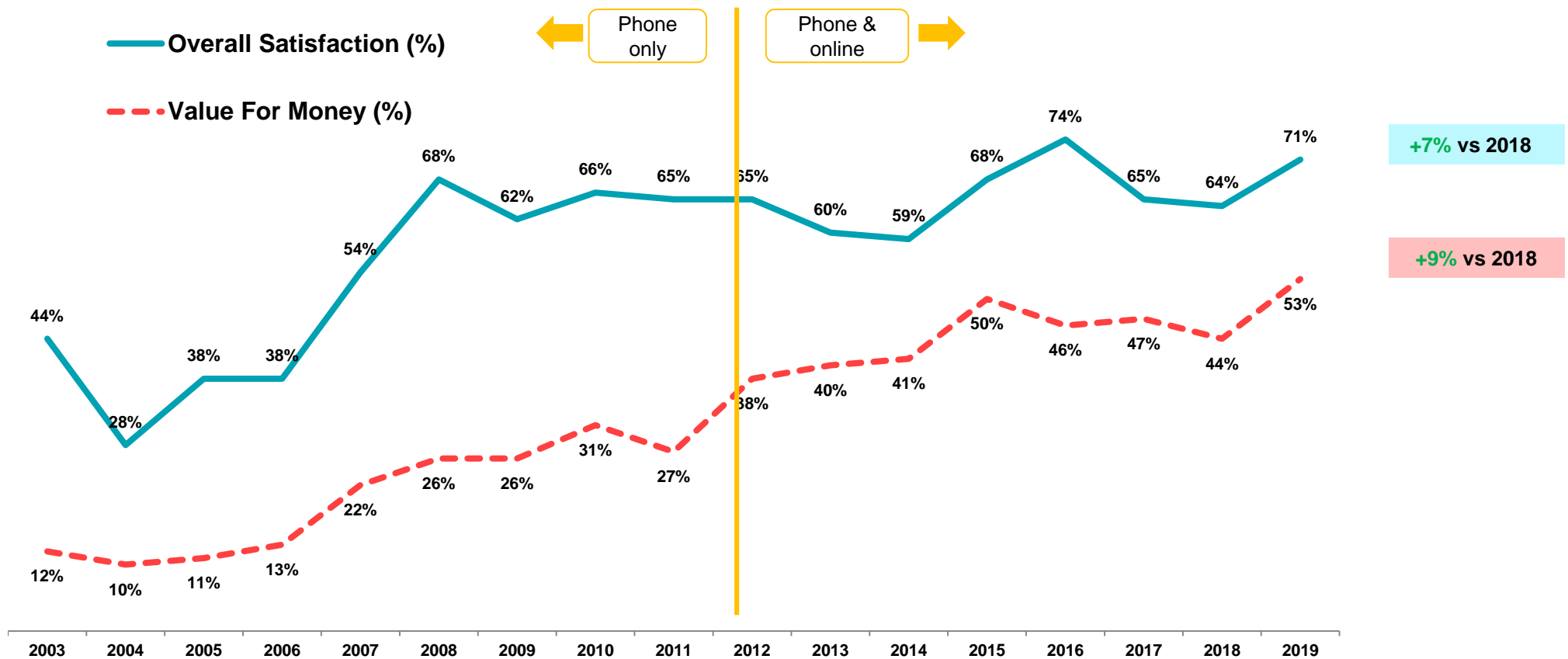
Overall Satisfaction has risen for the first time since 2016, reaching its second highest level to date. VFM has hit a new peak level.

Advocacy

Net Recommendation Score:	+63%	+69%	+73%	+76%	+61%	+74%	+63%

- ■ 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

	2013	2014	2015	2016	2017	2018	2019
Speak highly without being asked	26%	28%	21%	34%	28%	31%	21%
Speak highly if asked	44%	44%	56%	45%	39%	48%	48%
No strong opinion	23%	26%	19%	18%	25%	16%	24%
Critical if asked	7%	3%	3%	3%	6%	5%	5%
Critical without being asked			1%		1%		1%

Net Advocacy remains overwhelmingly positive (with just 6% saying they would be critical). Scores have dropped back to 2017 levels.

KPI by customer type

	Overall Satisfaction (% 8+ out of 10)	Value for Money (% 8+ out of 10)	Advocacy % Net recommendation
2019			
Small co. (<250 employees)	73%	51%	62%
*Medium Co. (250 - 1k employees)	73%	53%	68%
Large co. (>1k employees)	67%	56%	63%
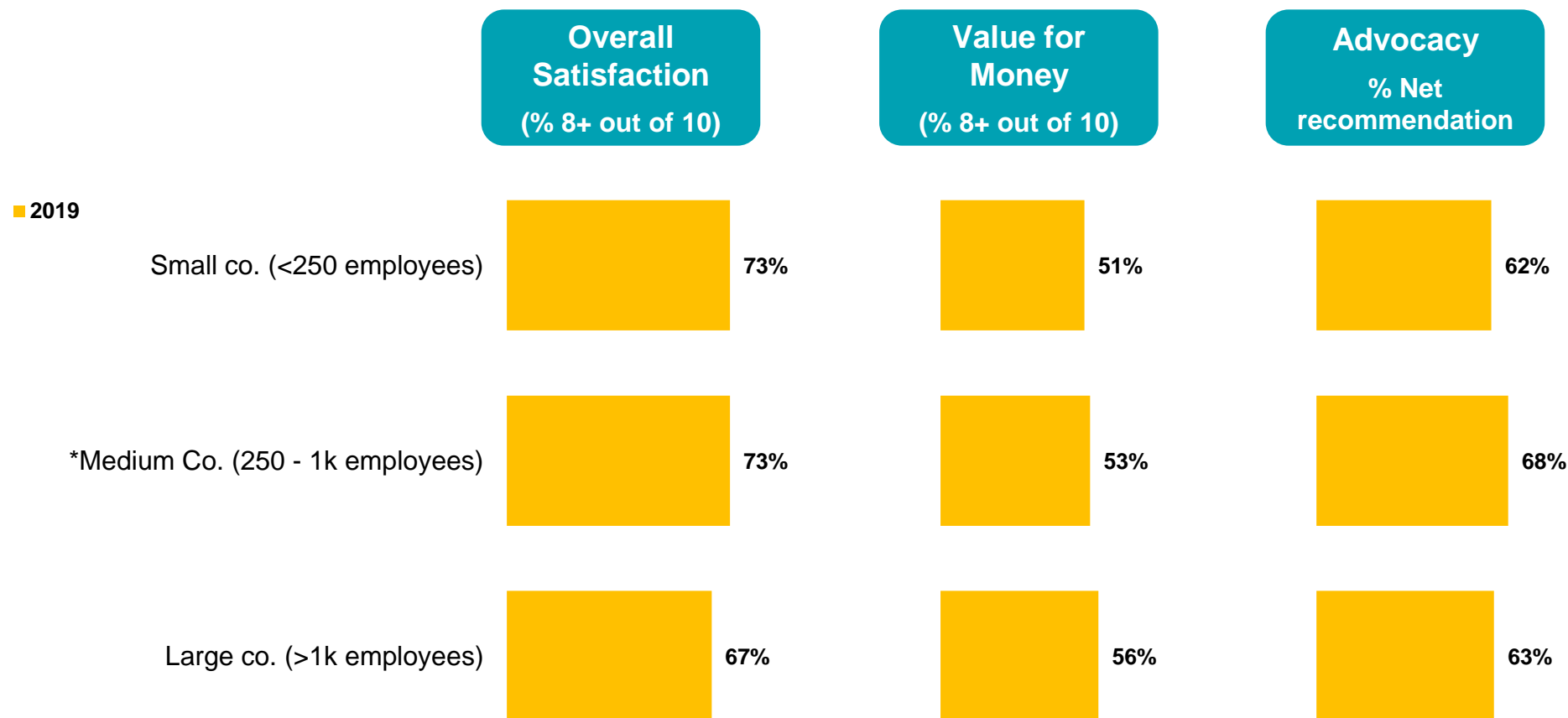
This year, a new company size segmentation has been introduced, based on number of full-time employees in the UK. The main KPIs are relatively consistent across the size of company worked for.

Whether ELEXON's service has improved over past 12 months
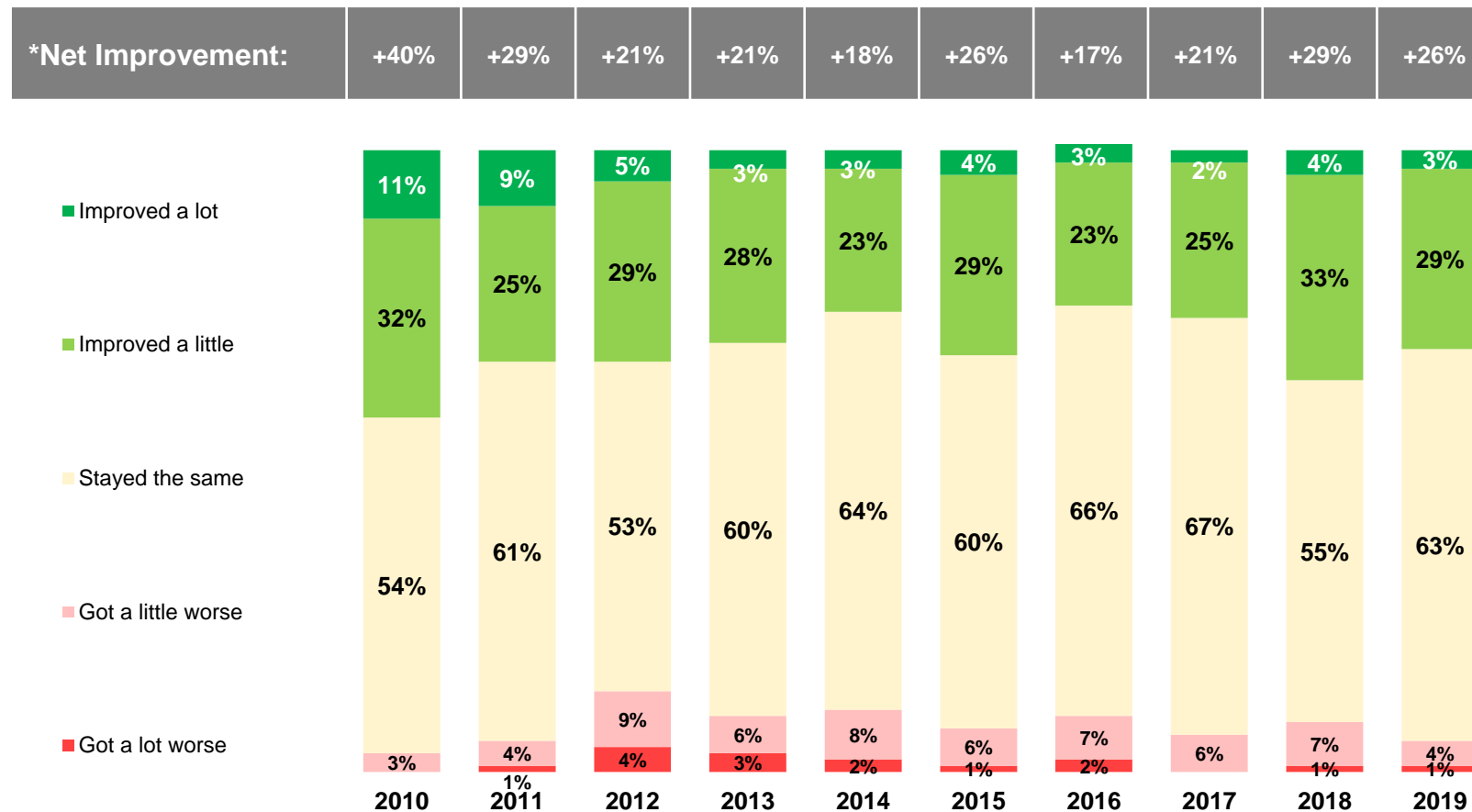
*Net Improvement:	+40%	+29%	+21%	+21%	+18%	+26%	+17%	+21%	+29%	+26%

- ■ Improved a lot
- ■ Improved a little
- Stayed the same
- ■ Got a little worse
- ■ Got a lot worse

	2010	2011	2012	2013	2014	2015	2016	2017	2018	2019
Improved a lot	11%	9%	5%	3%	3%	4%	3%	2%	4%	3%
Improved a little	32%	25%	29%	28%	23%	29%	23%	25%	33%	29%
Stayed the same	54%	61%	53%	60%	64%	60%	66%	67%	55%	63%
Got a little worse	3%	4%	9%	6%	8%	6%	7%	6%	7%	4%
Got a lot worse		1%	4%	3%	2%	1%	2%		1%	1%

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

Net improvement scores remain at a consistent level of +26%, with only 5% saying they felt ELEXON's service had actually got worse.

Whether ELEXON's service has improved over past 12 months

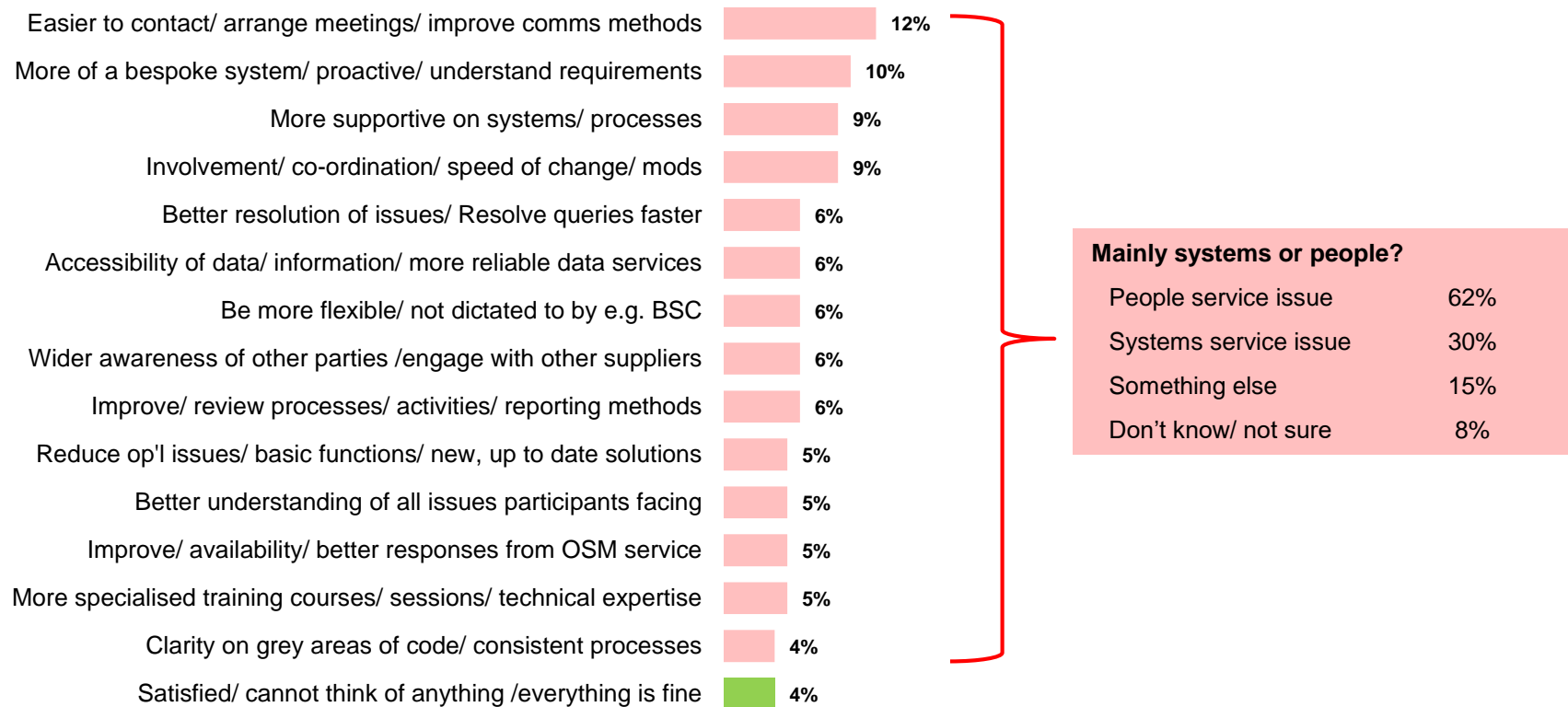| *Net Improvement:	Small co. (<250 employees) +22%	*Medium Co. (250 - 1k employees) +27%	Large co. (>1k employees) +29%
Improved a lot	2%	5%	2%
Improved a little	27%	32%	29%
Stayed the same	64%	55%	67%
Got a little worse	7%	9%	2%
Got a lot worse			

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

Those in larger organisations are taking a more positive view on the direction of service improvement, but all 3 groups are highly positive.

Base: Total sample (112), Small (45), Medium (22), Large (45)

Areas for improvement – spontaneous feedback

While **32%** felt ELEXON's service had improved, **63%** claimed it had not changed, and 5% felt it had got worse

69% offered spontaneous suggestions for improvements:

Easier to contact/ arrange meetings/ improve comms methods	12%
More of a bespoke system/ proactive/ understand requirements	10%
More supportive on systems/ processes	9%
Involvement/ co-ordination/ speed of change/ mods	9%
Better resolution of issues/ Resolve queries faster	6%
Accessibility of data/ information/ more reliable data services	6%
Be more flexible/ not dictated to by e.g. BSC	6%
Wider awareness of other parties /engage with other suppliers	6%
Improve/ review processes/ activities/ reporting methods	6%
Reduce op'l issues/ basic functions/ new, up to date solutions	5%
Better understanding of all issues participants facing	5%
Improve/ availability/ better responses from OSM service	5%
More specialised training courses/ sessions/ technical expertise	5%
Clarity on grey areas of code/ consistent processes	4%
Satisfied/ cannot think of anything /everything is fine	4%

Mainly systems or people?

People service issue	62%
Systems service issue	30%
Something else	15%
Don't know/ not sure	8%

Desire for further improvement is more often people related rather than system related e.g. communications, understanding, support

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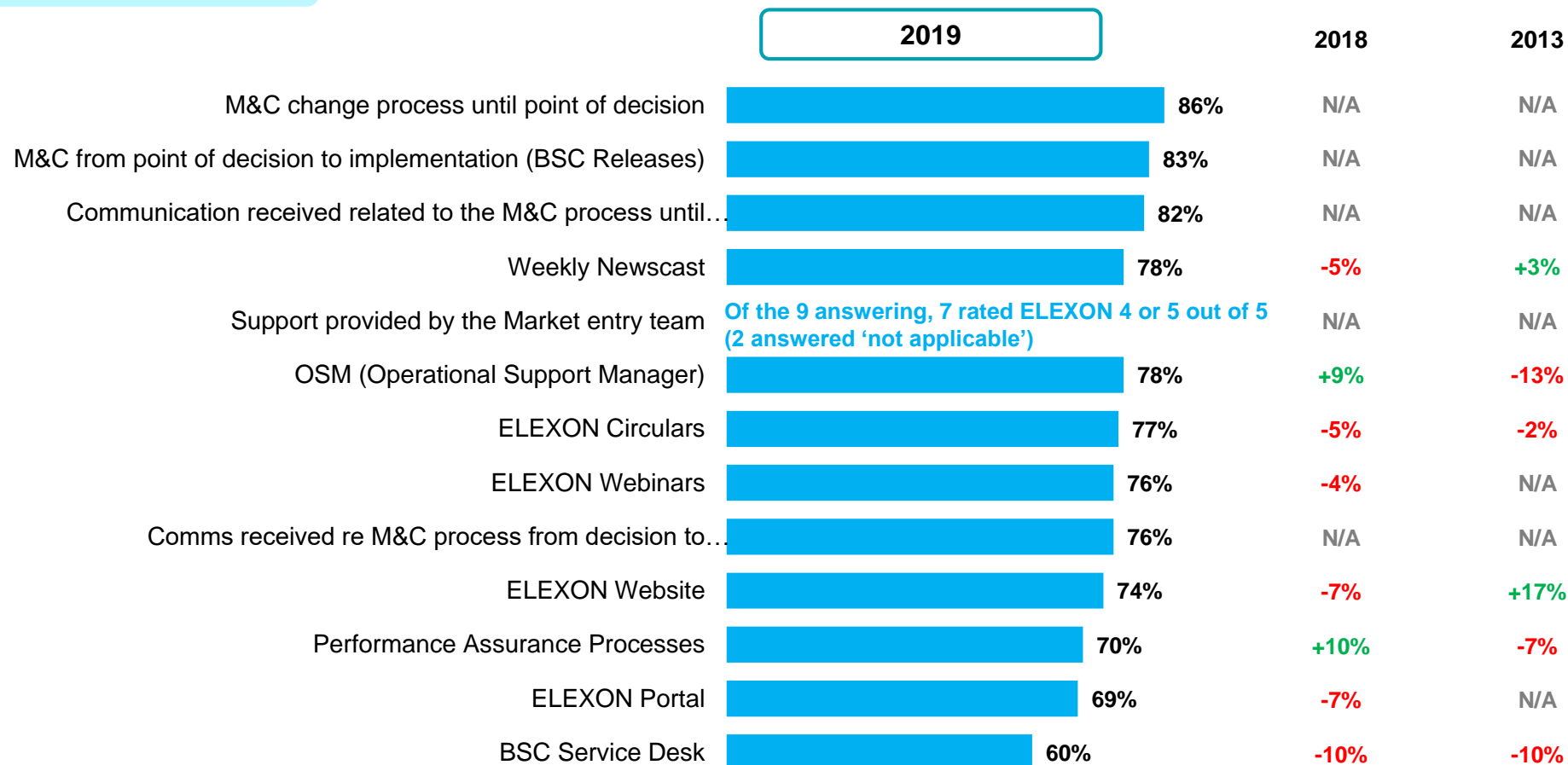
SCORE 8+ (Out of 10)
1 = Poor/ 10 = Excellent

	2019	Change versus	
		2018	2013
Overall professionalism	88%	+11%	+12%
Overall helpfulness	76%	+4%	+4%
Providing a valuable expert resource	71%	+6%	+9%
Facilitating industry debate & decision making	64%	+3%	+20%
Providing the right level of support for the industry	63%	+0%	+16%
Providing services that are timely, relevant & appropriate to your business	61%	+8%	+6%
Overall quality of communication	58%	-11%	+5%
Being efficient	58%	+3%	+11%
Being flexible	57%	+9%	+14%

With the exception of 'Overall communication', the proportion give ratings of 8+ out of 10 has improved for most aspects of service. The 8+ score for Overall communication is lower this year, but mean scores show no change reflecting less polarized response across the 10-point scale used.
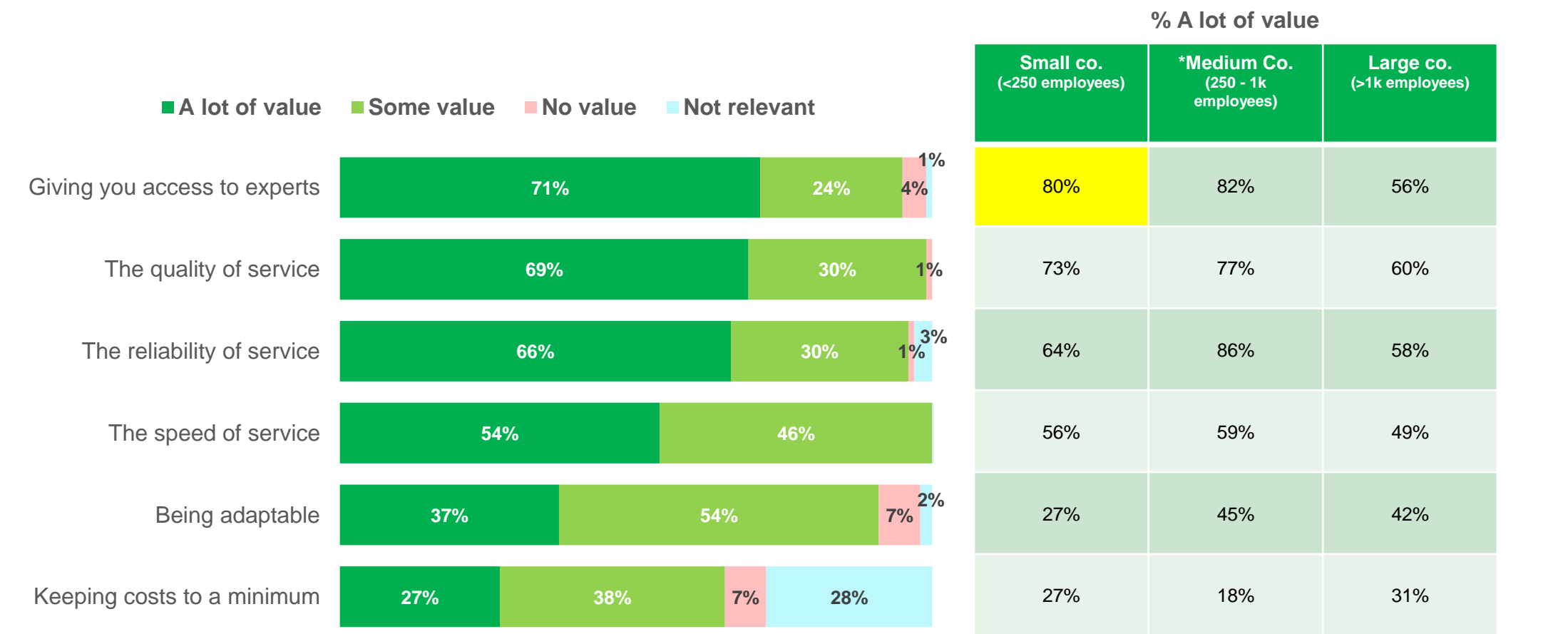
Overall rating of ELEXON service areas

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

Change versus

	2019	2018	2013
M&C change process until point of decision	86%	N/A	N/A
M&C from point of decision to implementation (BSC Releases)	83%	N/A	N/A
Communication received related to the M&C process until…	82%	N/A	N/A
Weekly Newscast	78%	-5%	+3%
Support provided by the Market entry team	Of the 9 answering, 7 rated ELEXON 4 or 5 out of 5 (2 answered 'not applicable')	N/A	N/A
OSM (Operational Support Manager)	78%	+9%	-13%
ELEXON Circulars	77%	-5%	-2%
ELEXON Webinars	76%	-4%	N/A
Comms received re M&C process from decision to…	76%	N/A	N/A
ELEXON Website	74%	-7%	+17%
Performance Assurance Processes	70%	+10%	-7%
ELEXON Portal	69%	-7%	N/A
BSC Service Desk	60%	-10%	-10%

Methodology changes mean that it is harder to compare our 5 point ratings with earlier surveys. Feedback on Market Entry was all positive.

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

How much value key aspects of ELEXON's service (NEW)

Legend: ■ A lot of value ■ Some value ■ No value ■ Not relevant

Aspect	A lot of value	Some value	No value	Not relevant
Giving you access to experts	71%	24%	4%	1%
The quality of service	69%	30%	1%	
The reliability of service	66%	30%	1%	3% (1% No value)
The speed of service	54%	46%		
Being adaptable	37%	54%	7%	2%
Keeping costs to a minimum	27%	38%	7%	28%

% A lot of value

	Small co. (<250 employees)	*Medium Co. (250 - 1k employees)	Large co. (>1k employees)
Giving you access to experts	80%	82%	56%
The quality of service	73%	77%	60%
The reliability of service	64%	86%	58%
The speed of service	56%	59%	49%
Being adaptable	27%	45%	42%
Keeping costs to a minimum	27%	18%	31%

Customers value ELEXON's expertise and the quality and reliability of its service most of all. Expertise is especially key for smaller co.s

Base: Total sample (112), Small (45), Medium (22), Large (45)

Next steps

There is much that customers value about ELEXON's work. Most of all, they want it to keep delivering on what it is already highly regarded for; **quality of service**, **reliability**, providing **knowledge & expertise** and **engaging with the industry**.

ELEXON should also address areas that have been criticised or where improvement is sought, which include:

Overall engagement	• Avoid being too inflexible or too process driven. • Demonstrate that you understand their needs and tailor the support you give around this.
Comms	• Improve portal functionality and communication • Investigate how delivery of BSC service desk could be improved
OSMs	• Address cases of unresponsive/ lax service levels • Improve understanding of their business (or demonstrate it) • Meet their desire for more regular contact where appropriate

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Continued…

Next steps, continued

| Mods & Changes | → | • Simplify communication
• Provide more timely communication (sufficiently in advance) |

| Committees/ meetings | → | • Address continued issues with quality of teleconferencing facilities
• Consider how 'unwelcoming' criticisms could be addressed |

There are also some opportunities to bring even more value:

| PAF | → | • 3 in 4 are unaware of the changes in deployment of PAF, yet it is of relevance to most
• Continue to promote greater awareness and understanding |

| The Foundation Programme (TFP) | → | • Awareness is limited (1 in 4 actually know something about it)
• However, there is widespread interest in learning more. In particular educate on the key benefits and their relevance. |

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Thank you

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