

Public

Switched On! 2016 customer survey results

ELEXON

Key themes

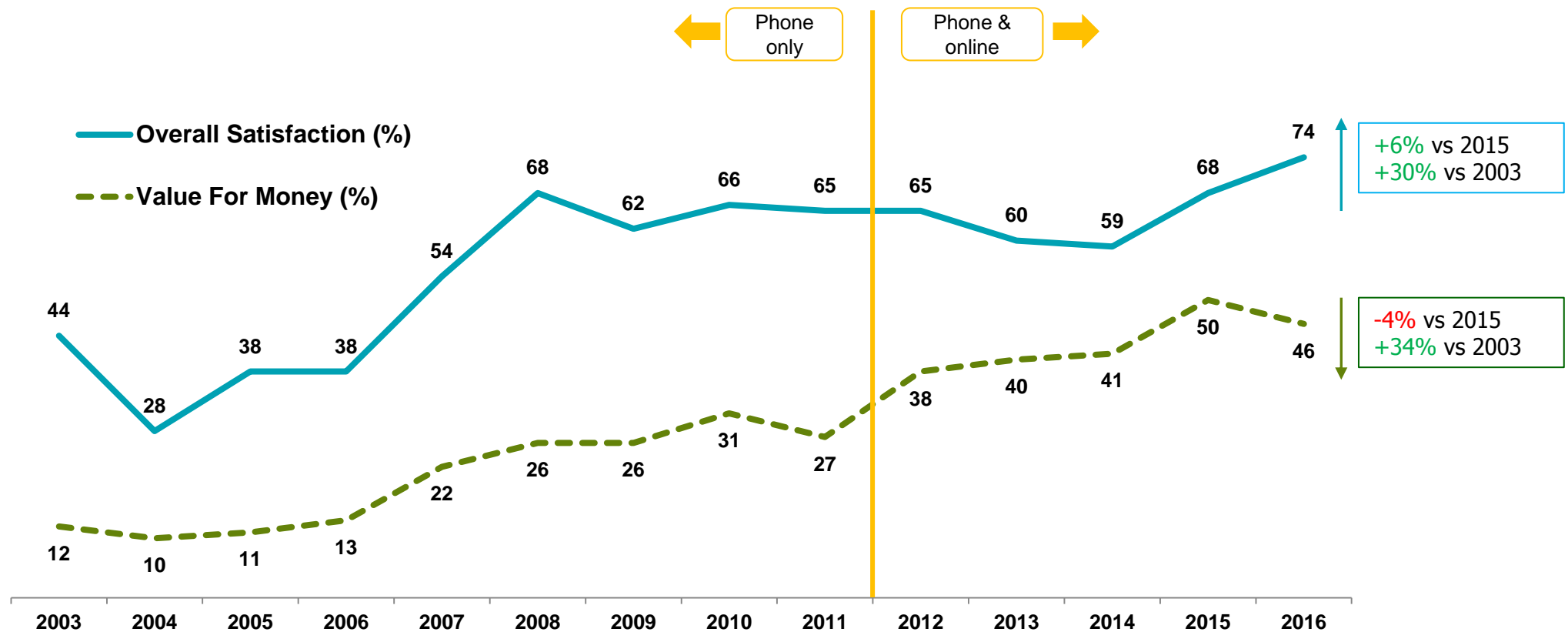
- ELEXON's Overall Satisfaction and Advocacy scores have increased to a new high.
- Value for money perceptions have shown a slight dip but, when pressed, customers are more concerned that ELEXON maintains necessary levels of quality and expertise rather than reduce costs.
- The BSC is the only code or agreement rated more positively this year, despite all others showing a decline.
- Nine (9) of the 11 ratings of service are improved, particularly those most likely to drive satisfaction: being helpful, relevant, providing expertise and quality of communication.
- On several measures Big 6 Suppliers are not as positive as a year ago, but qualitative research indicates this is not down to a single factor but rather a spread of isolated individual concerns.
- The navigation and search facility of ELEXON's website could be improved but the qualitative research has also highlighted several other potential improvements worth considering.

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



A 6% increase in overall satisfaction means 2016 has been the strongest score to date. Although Value for Money has slipped, this is still the second best score on record.

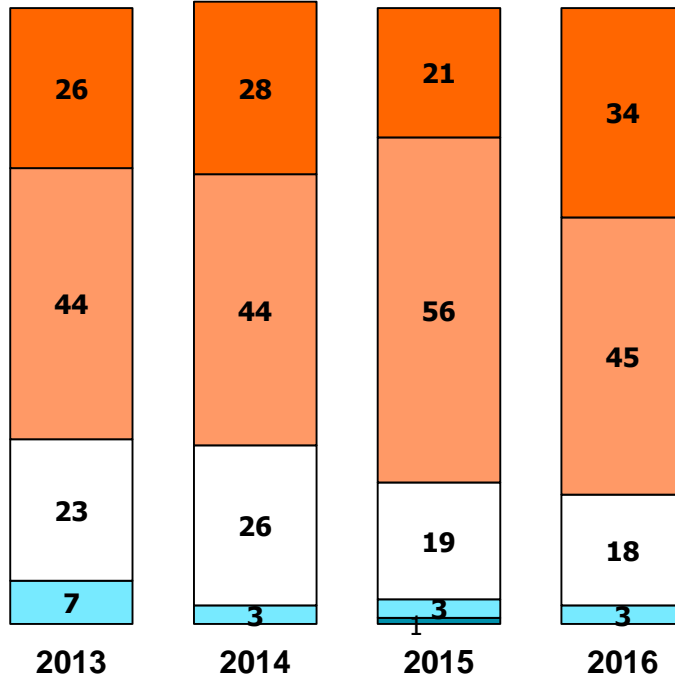
Advocacy

Net Recommendation Score:

 **+63%**
 **+69%**
 **+73%**
 **+76%**

%

- 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 highly critical of them if someone asked me
- I would be highly critical of them without being asked

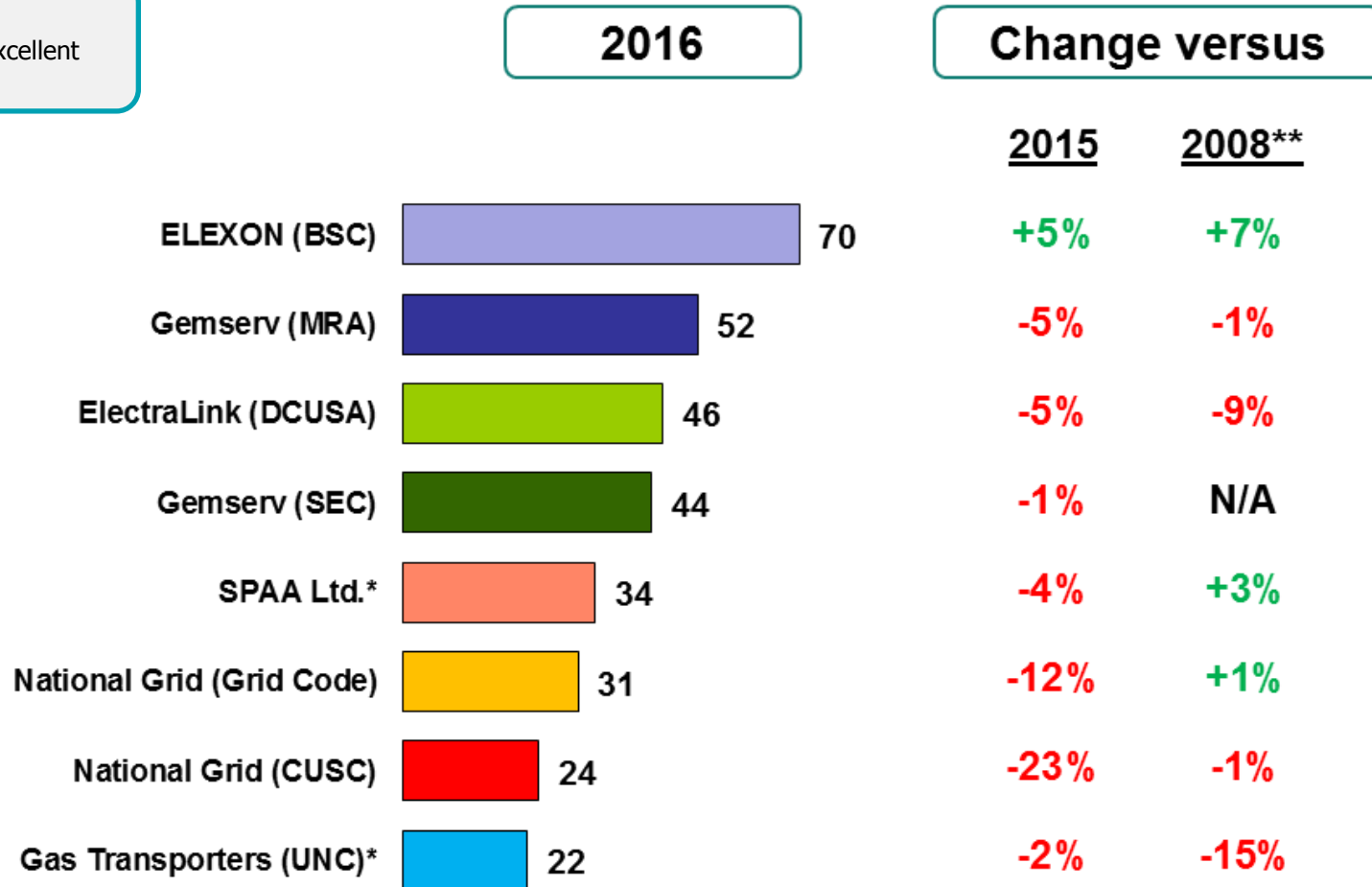


Net Recommendation Score (%)	2014	2015	2016
Total Sample (116)/ (131)/ (105)	+69	+73	+76
'Big 6' Suppliers (35)/ (38)/ (24)	+71	+71	+71
Other Companies (81)/ (93)/ (81)	+67	+75	+77
BSC Party (68)/ (76)/ (69)	+70	+74	+82
Supplier Agent (43)/ (37)/ (34)	+72	+81	+76
Committee/ Panel Member (36)/ (38)/ (35)	+75	+65	+80
Industry Body (16) /(14)/ (6)	+63	+57	+67
Operations (44)/ (64)/ (55)	+84	+81	+78
Compliance (28)/ (40)/ (31)	+66	+77	+74
Regulatory Affairs (25)/ (50)/ (34)	+66	+80	+76

Net advocacy is at its highest point to date. Within Big 6 suppliers advocacy levels remain very consistent with the past two years. Committee/panel members and BSC Parties give more positive feedback this year.

Comparative ratings

SCALE 1 to 10
1 = Poor/ 10 = Excellent
8+ Scores shown



*CAUTION: Low Base Size

** Results before 2012 based on phone interviews only (no online surveys)

Rating of ELEXON for the BSC has shown an almost identical uplift to ELEXON's overall satisfaction rating, and shows an even larger improvement relative to other codes, for whom ratings have fallen slightly.

A number of over-riding themes emerge from the qualitative stage

ELEXON setting the standard

It is seen as a critical partner that is helpful, professional and has robust procedures that others can learn from. Its costs are justified and the service should not be diluted by cost-savings.

A desire for a more proactive relationship

ELEXON's systems are trusted and the expertise of its people is highly valued. Most desire an even closer, more proactive relationship through OSMs, subject experts and digital media.

The website needs to be improved

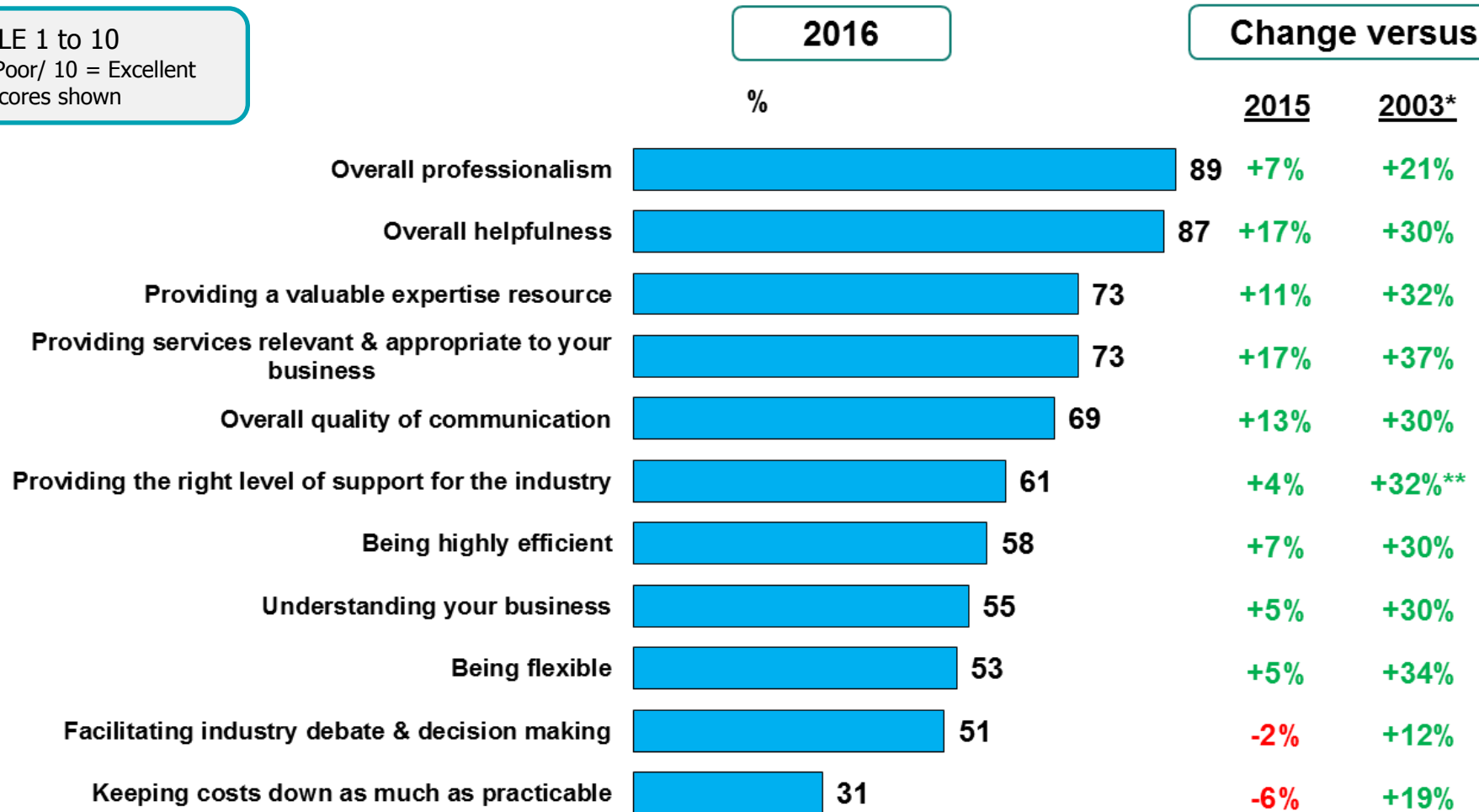
All users have issues, particularly around navigation and search. Light/new users struggle most but more heavy/experienced users have learned to work with it – change needs to be evolution rather than revolution.

There are always detailed issues where ELEXON can refine things

Many of these involve enabling participants to comply more easily by giving them even more know-how and better means e.g. better systems and data, access to expertise and advice.

Detailed attribute ratings

SCALE 1 to 10
1 = Poor/ 10 = Excellent
8+ Scores shown



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** Comparison with 2004 (first year question included)

Perceived improvement in ELEXON's service has been strongest for 'overall helpfulness' and 'providing services relevant and appropriate to your business'. Perception of communication and expertise are also amongst a number of improved ratings.

A qualitative stage added this year to the main quantitative survey

The quantitative stage completed by all market participants, including BSC Parties and Party Agents, from a list supplied by ELEXON. The qualitative used a more selective group of respondents across a spread of company types, roles and opinions from the quantitative stage.

Stage 1: Quantitative



All ELEXON customers invited to complete

10 minute survey

- 105 ELEXON customers/ stakeholders responded
- Mix of phone (65) and online (40) interviews
- 22 June – 5 August 2016



Stage 2: Qualitative



- 12 face-to-face in depth interviews, including website pre-task
- Mix of those giving positive or negative quantitative feedback
- Even mix of Big 6 suppliers and others
- Including suppliers, MOPS, DNOs, DCs, generators, metered and unmetered, commercial and domestic
- Roles include regulation, compliance, operations, commercial
- 4 – 17 October 2016

Next steps

We will review the results in more detail and identify any actions we need to take.

In particular we will focus on:

- **The website:** review and identify ways to improve the structure, layout, navigability and the search facility.
- **OSMs:** continue to identify ways to improve our OSM service
- **Maintaining existing standards:** as ELEXON is already held in high regard for its systems, approach and people, we will look to maintain our existing high standards and continually strive to improve.