

Public

# Switched On! 2017 customer survey results

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**ELEXON**

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## Key themes

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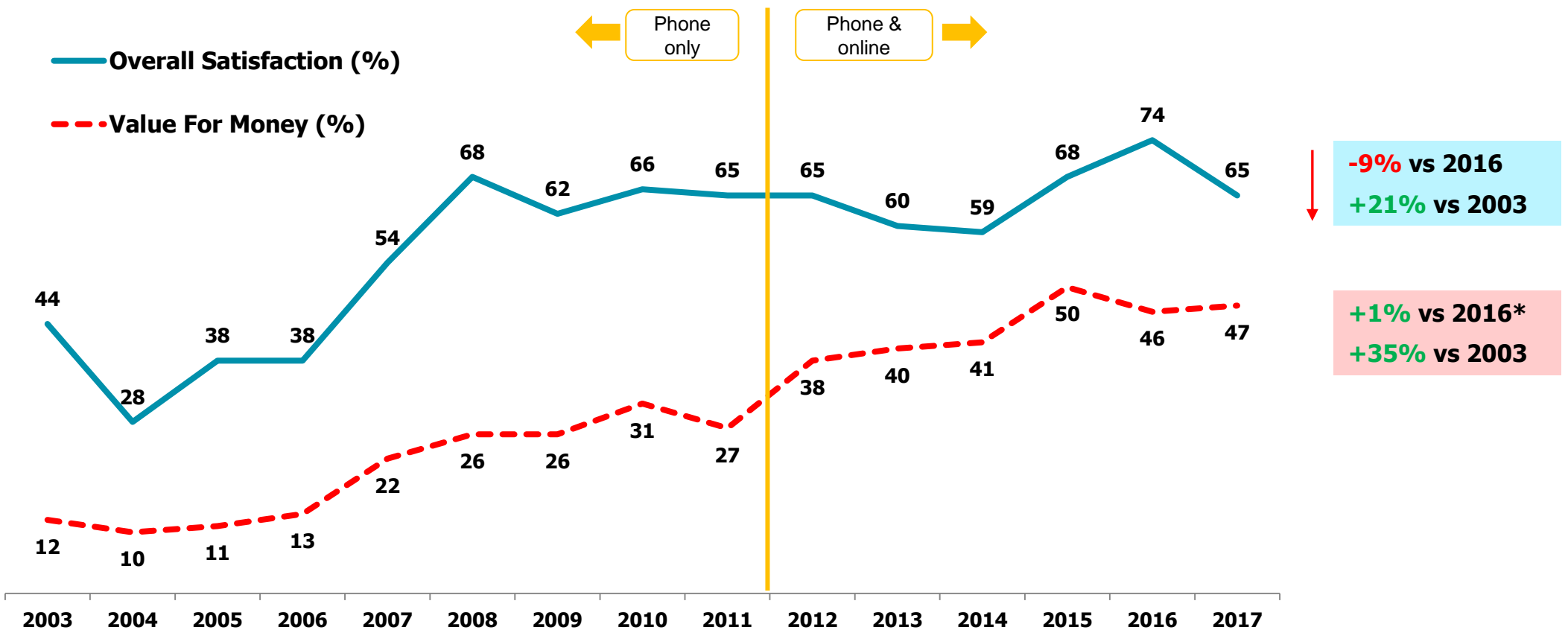
- This year, both Satisfaction and Net Recommendation are lower, whilst Value for money remains stable. Declines are mainly attributable to smaller parties and those newer to ELEXON, who represent the largest single group (44%)
- By contrast, Big 6 companies (22% of the sample) are generally more positive year-on-year.
- Detailed results highlight areas where there are opportunities to meet the needs of some customer or stakeholder groups more effectively.
- Two aspects are being rated less well than a year ago across most groups; '**Overall helpfulness**' and '**Providing services relevant & appropriate to your business**'. Again this lower rating is more significant with smaller parties, who are also giving lower scores for Market Entry support.
- As newer players grow in number, fewer claim to have experienced some of ELEXON services (particularly OSMs), but there is evidence that many new/smaller players would welcome more support or guidance.
- Criticism of the website has nearly halved and is no longer the most criticised area and 94% of the respondents said that our service has improved or stayed the same.

# 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



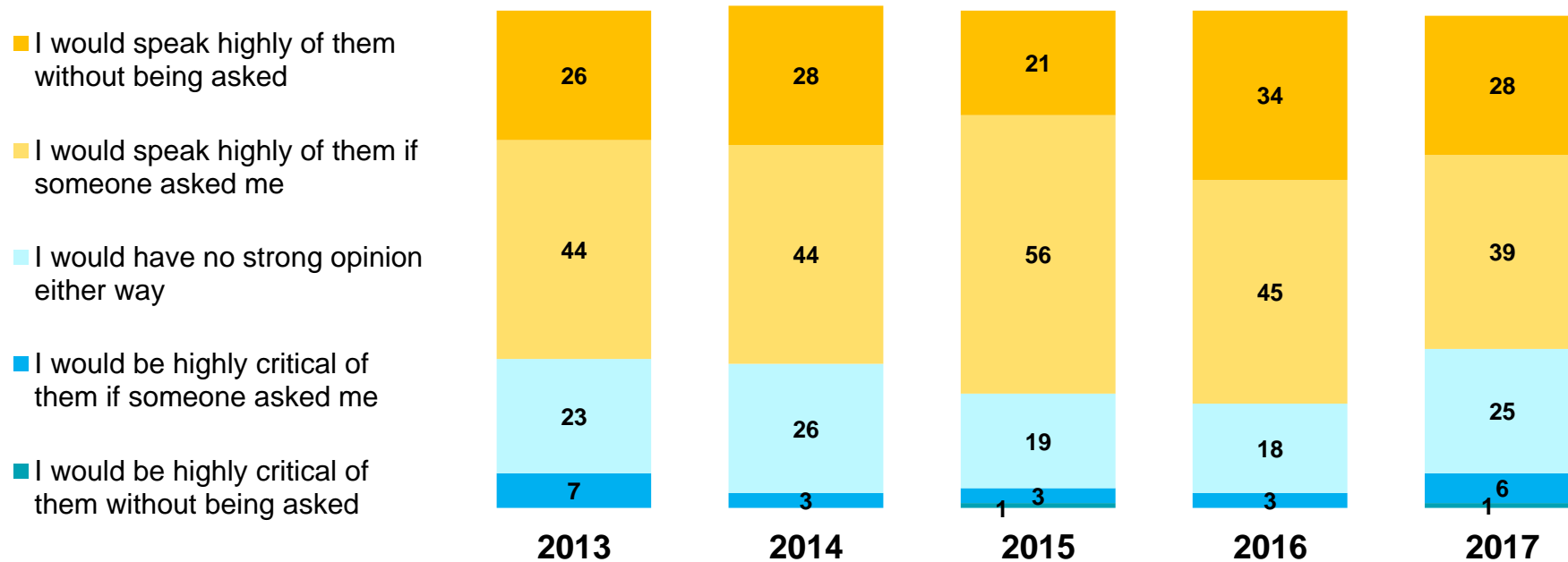
Overall satisfaction levels have fallen 9%, back in line with more typical recent levels, having been higher in 4 out of the 15 years tracked to date.

Value for money remains relatively high.

# Advocacy

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

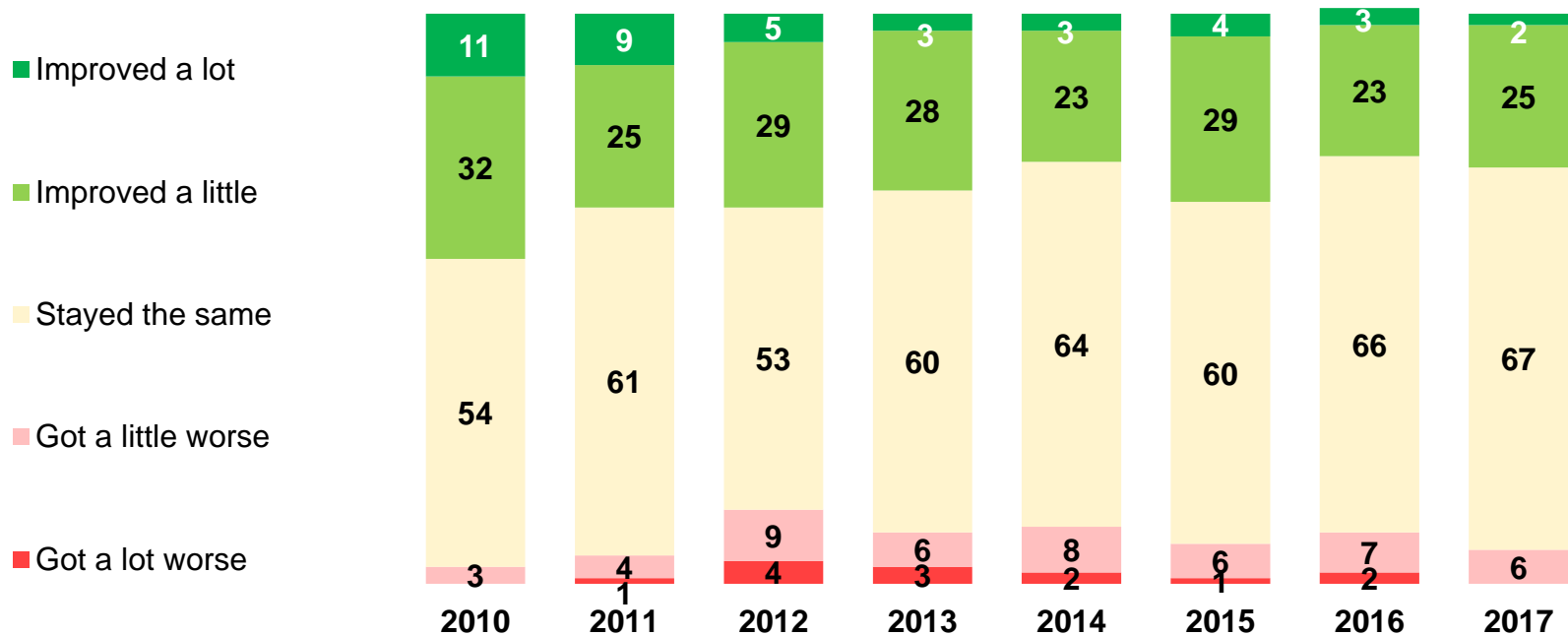


At +61%, net advocacy levels are still overwhelmingly positive, but opinion is now more polarised, making this the lowest level in the 5 years it has been measured.

# Whether ELEXON's service has improved over past 12 months

%

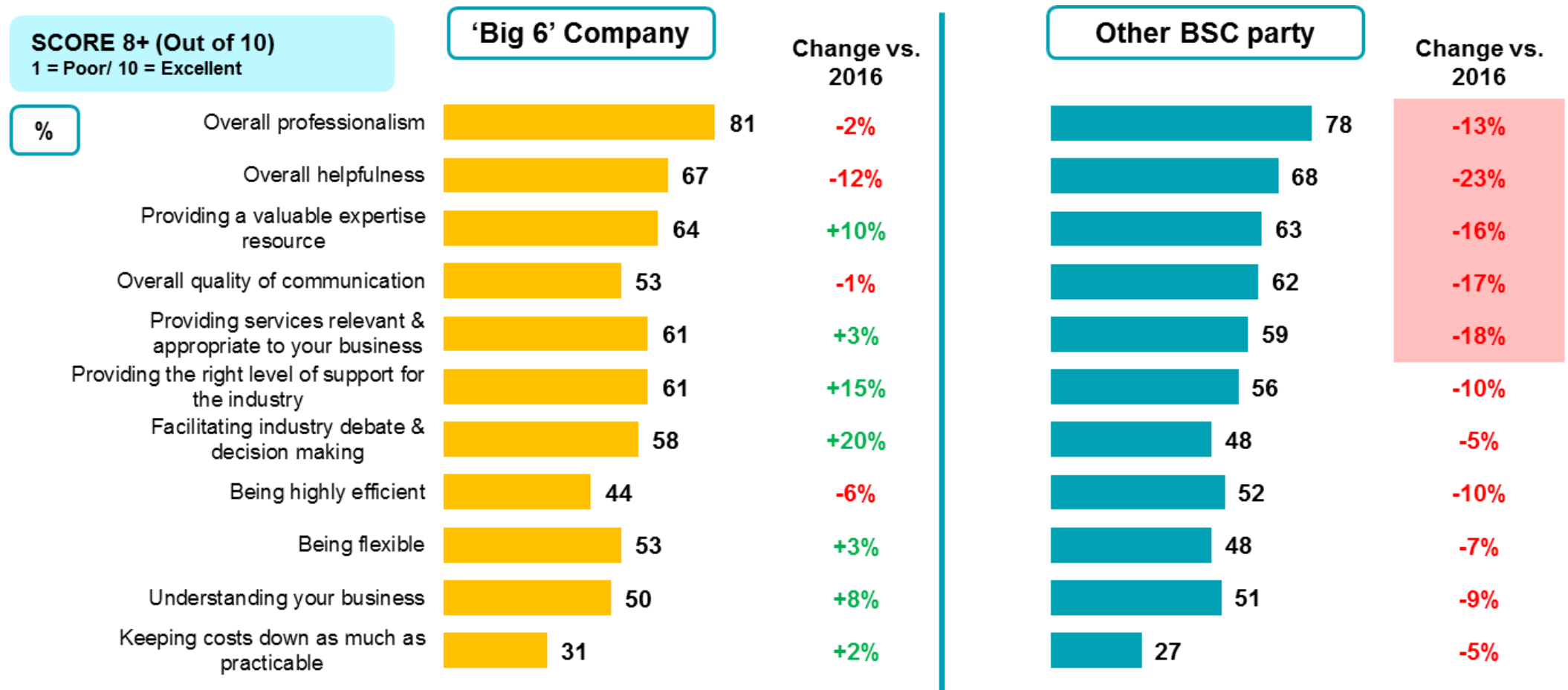
<b>*Net Improvement:</b>	+40%	+29%	+21%	+21%	+18%	+26%	+17%	+21%
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\*Net improvement = % improved minus % got worse – an indicator of the 'sense' that ELEXON is improving

The sense of improvement is very consistent with recent years. In fact 94% of the respondents said that our service has improved or stayed the same. For the first time in 7 years, no-one felt service had got a lot worse.

# Detailed attribute ratings



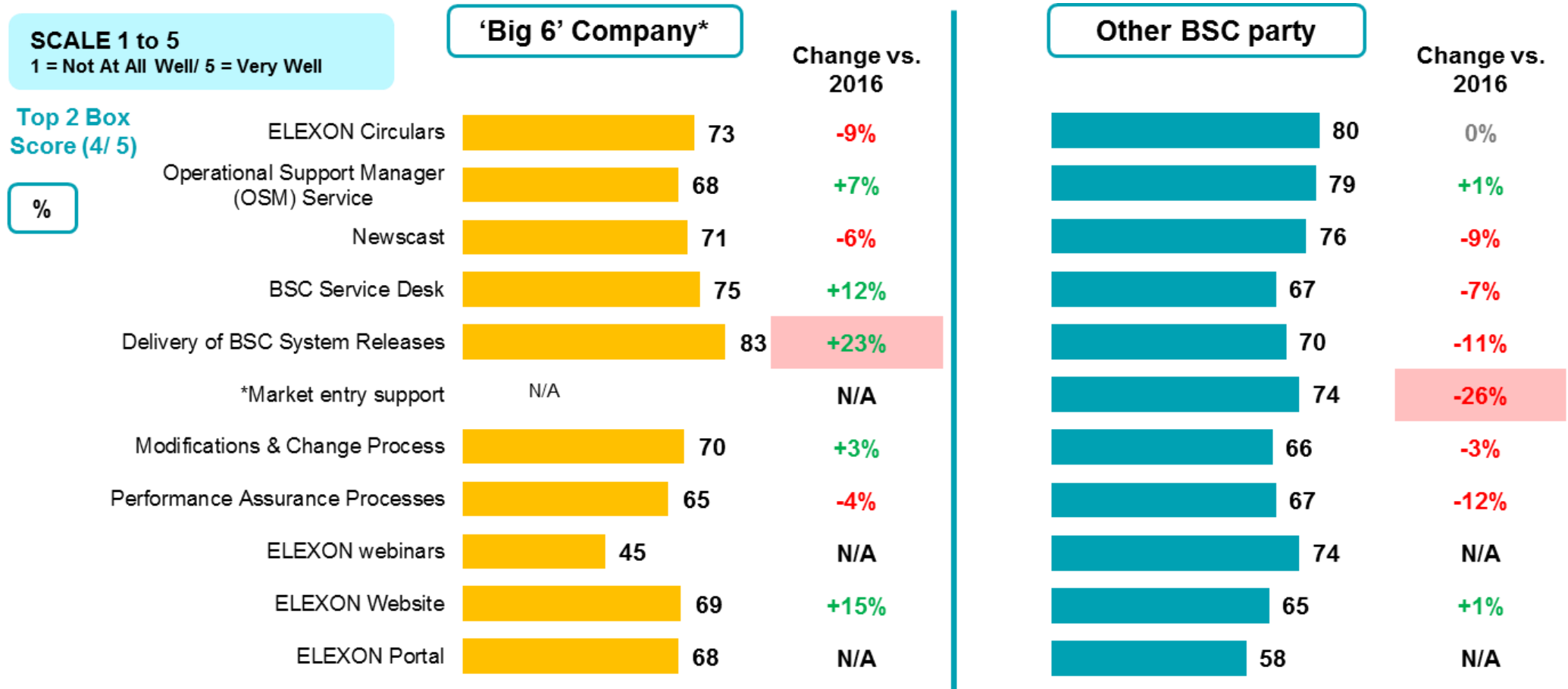
The most notable decline in ratings has been for overall helpfulness and providing relevant/ appropriate services.

Overall helpfulness is lower for all parties, but more significantly so for smaller parties, along with several other attributes

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

\*\* Comparison with 2004 (first year question included)

# Rating of ELEXON service areas



At an overall level ratings of each service area have not changed significantly YOY.

Big 6 players are happier with many areas, notably BSC System Releases.

Smaller players are rating Market Entry less well though.

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## Next steps

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These results emphasise the importance of continuing to do the basics well; sharing ELEXON's expertise, delivering a high quality, reliable service.

There is scope to improve further in certain areas:

- **Overall helpfulness;** hand holding newer players (in-person or online), staffing levels and responsiveness, showing understanding of participants' needs and using ELEXON's expertise and knowledge to support them, providing easy to digest info/ explanation via the website and portal (as well as improving usability of the latter).
- **Getting the most out of meetings;** for most they work fine, but there are opportunities to enhance further (e.g. MOD Group, PAB, BSC Panel) through firmer chairing, being supportive of smaller parties, encouraging wider attendance/ greater inclusiveness, which in turn will be well supported through advances in conferencing facilities e.g. real-time sharing, video conferencing and real-time collaboration.
- **Balancing the needs of different participants;** big vs small, established vs inexperienced. Remain flexible, adaptable and inclusive.