# Elexon Switched-On! Customer Survey 2020

December 2020

When we look at this year's results we must keep in mind the impact that Covid-19 will have had on customers, Elexon itself and the research process

- Response to the survey was markedly lower than usual for this time of year; 90 completed surveys, compared to 112 over the same period in 2019.

- Lower response came via both interviewing modes:

  - Phone – remote working meant that many were inaccessible, with receptions/colleagues naturally unwilling to pass on direct phone numbers.

  - Online – impacted less, but insufficient to compensate for reduced response via phone, and harder to 'chase up' partially completed surveys via phone.
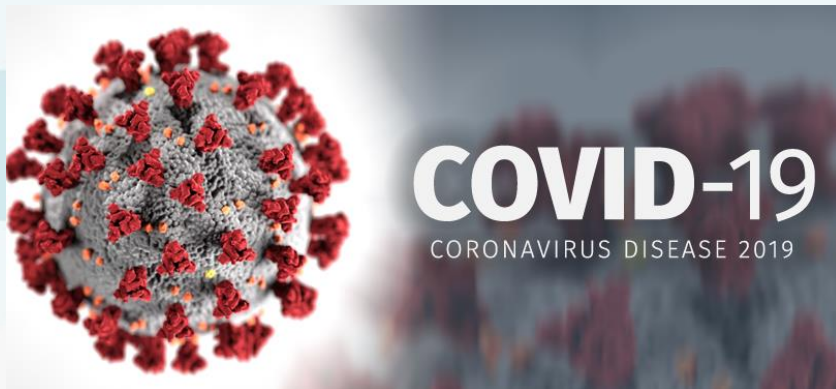
It is more difficult to determine how much impact Covid-19 may have had on responses to questions, due to the impact of Covid-19 on :

- Elexon's ability to deliver its services.

- Respondents' personal and professional circumstances, and resulting impact on their attitudes and behaviour.

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Key headlines

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Key headlines – overall level

Access to expertise, plus quality and reliability of service remain key priorities. However, the high degree of change this year means that greater importance is being placed on Elexon's adaptability.

Despite the turbulence of this year, key overall ratings have remained remarkably close to usual levels, although those in smaller companies are rating Elexon less well generally.

One consequence of this year's challenges appears to be a weaker sense that Elexon's service has improved, and this has come across all sizes of organisation.

Although only a minority identify specific improvements needed, modernisation of systems, proactively understanding needs and facilitating communication are all key general themes.

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Key headlines – specific areas

Communications
Claimed use of some comms touchpoints has reduced, but feedback is more positive this year. More tailored comms taking into account their business profile would be a welcome improvement.

OSMs
Ratings of OSMs are down slightly but they are meeting or exceeding expectations for most. Quality and speed of response are pivotal to success. More understanding of business needs is desired by some.

BSC Change
Feedback on change has been even more positive this year, particularly communication before or after the decision point. Fewer therefore cite improvements, with better planning and simpler comms the main two.

Digital future
Familiarity and understanding of Elexon's digitalisation programme is growing. Interest is high. Regular updates and a road map are desired, but via the website and a variety of other comms touchpoints.

Committees
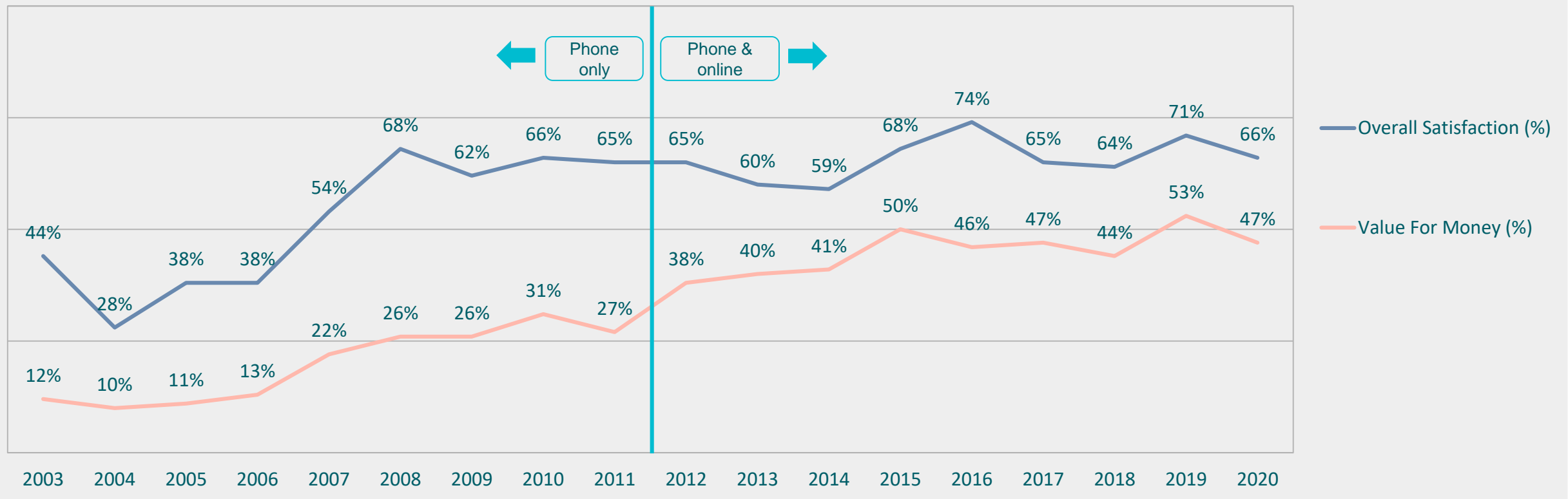There has been mixed feedback this year. Conferencing facilities have become more valued (due to Covid). However, concerns about the reducing quality of meeting papers needs addressing.

Performance Assurance
Delivery of the PA process has been rated even more positively this year, particularly medium or large organisations. 1 in 3 are aware of ongoing changes and are largely positive about them.

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We have seen a marginal decrease in both Overall Satisfaction and VFM 8+ ratings, but this is still in line with 3 of the 5 previous years.

Overall ratings of Satisfaction and Value For Money
(% Scoring 8-10 out of 10)

Phone only ← | → **Phone & online**

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

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

Years: 2003, 2004, 2005, 2006, 2007, 2008, 2009, 2010, 2011, 2012, 2013, 2014, 2015, 2016, 2017, 2018, 2019, 2020

QB2: Thinking about all your dealings with ELEXON, how would you rate them overall?
QB5: And what do you feel overall about ELEXON in terms of the value for money they provide?

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Base: Total sample (varies by wave)

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Although steady overall, Satisfaction and VFM has reduced slightly with small companies, but improved with medium and larger companies

Overall satisfaction (Mean scores out of 10)

Total sample	Small (<250 FTE)	Medium (250-1k FTE)	Large (>1k FTE)
7.91 ▼ 7.78	8.04 ▼ 7.59	7.91 ▲ 7.94	7.78 ▲ 7.85
2019 2020	2019 2020	2019 2020	2019 2020

Value for money (Mean scores out of 10)

Total sample	Small (<250 FTE)	Medium (250-1k FTE)	Large (>1k FTE)
7.59 ▲ 7.66	7.62 ▼ 7.52	7.60 ▲ 8.15	7.56 = 7.55
2019 2020	2019 2020	2019 2020	2019 2020

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There is a slightly larger cohort this year that would be critical if asked their opinion of Elexon, resulting in a 5 point reduction in Net Advocacy.

Advocacy – Total sample

NET Advocacy	% Speak highly - % critical	+63%	+69%	+73%	+76%	+61%	+74%	+63%	+58%

Legend:
- 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	2020
Speak highly without being asked	26%	28%	21%	34%	28%	31%	21%	18%
Speak highly if asked	44%	44%	56%	45%	39%	48%	48%	52%
No strong opinion	23%	26%	19%	18%	25%	16%	24%	18%
Critical if asked	7%	3%	3%	3%	6%	5%	5%	10%
Critical without being asked			1%		1%		1%	2%

QB6: I'd now like you to think about all of the experiences and perceptions of ELEXON that you have. If you were talking to a colleague about ELEXON which of these answers would best reflect your opinion of them?

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Base: Total sample (varies by wave)

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The reduction in Net Advocacy is driven entirely by small and medium sized organisations, but not larger ones.

Net Advocacy - Total sample

-5%

63% 58%

2019 2020
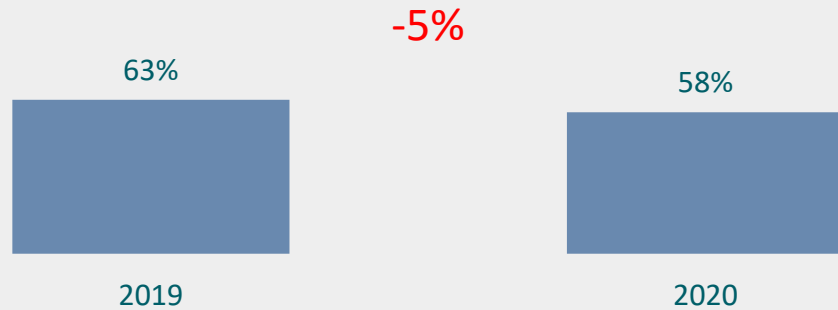
Net Advocacy - Small (<250 FTE)

-12%

62% 50%

2019 2020

Net Advocacy - Medium (250-1k FTE)

-12%

68% 56%

2019 2020
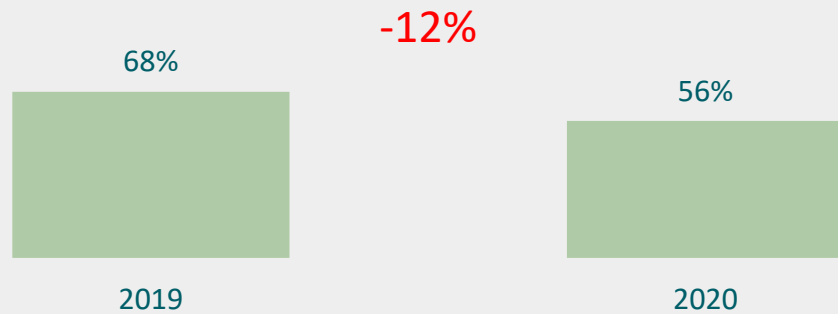
Net Advocacy - Large (>1k FTE)

+2%

63% 65%

2019 2020

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There has been a notable fall in this year's Net Improvement score, primarily driven by those feeling service has been 'maintained' rather than 'improved'

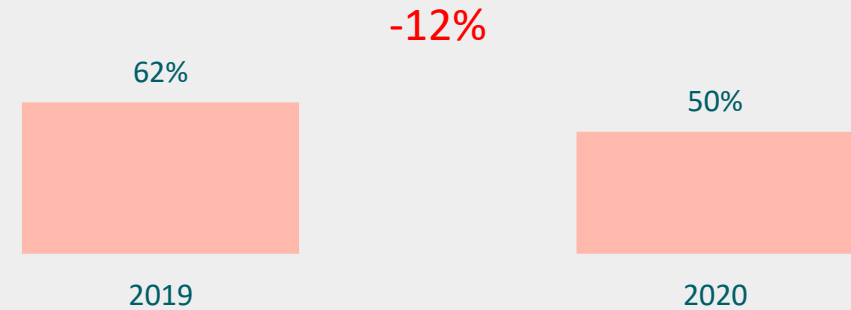## How Elexon's service has improved over the past 12 months

NET Improvement	% Improved – % worse	+40%	+29%	+21%	+21%	+18%	+26%	+17%	+21%	+29%	+26%	+7%

Stacked bar chart showing responses by year (2010–2020):

Category	2010	2011	2012	2013	2014	2015	2016	2017	2018	2019	2020
Improved a lot	11%	9%	5%	3%	3%	4%	3%	2%	4%	3%	1%
Improved a little	32%	25%	29%	28%	23%	29%	23%	25%	33%	29%	18%
Stayed the same	54%	61%	53%	60%	64%	60%	66%	67%	55%	63%	69%
Got a little worse	3%	4%	9%	6%	8%	6%	7%	6%	7%	4%	8%
Got a lot worse		1%	4%	3%	2%	1%	2%		1%	1%	4%
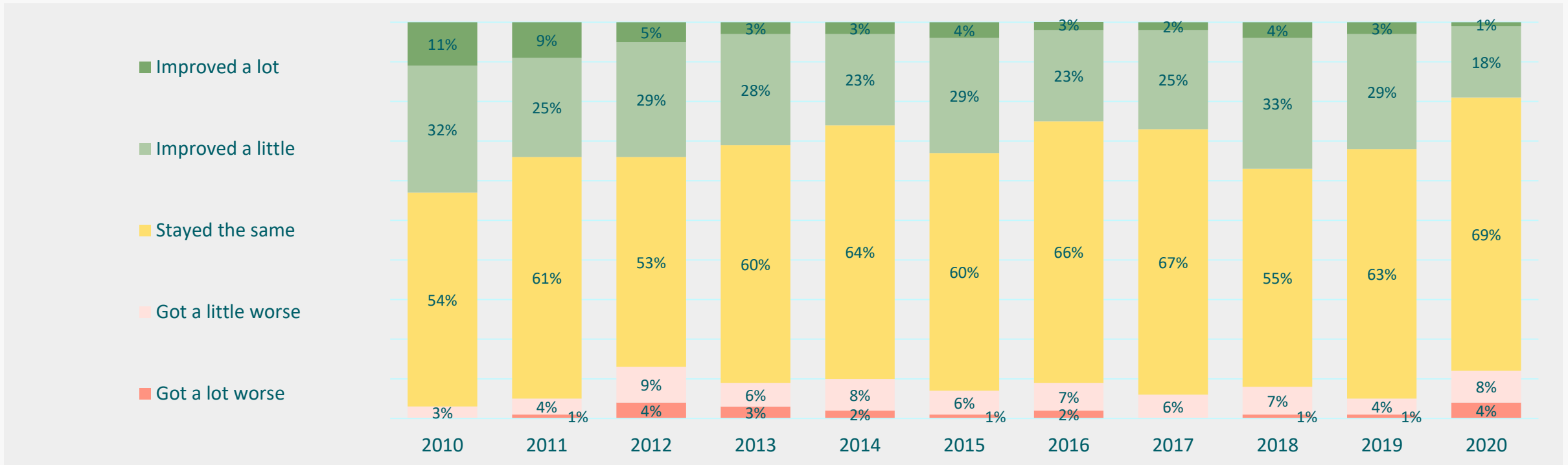
Modernisation, proactively understanding needs and facilitating communication are all key suggested improvements, but half suggest none.

What would most like Elexon to improve on in the next 12 months

Improvement	%	Change vs 2019
Reduce operational issues/ modernise processes / implement new solutions / simplify	11%	+6%
More of a bespoke system / more proactive / understand requirements	11%	+1%
Easier to contact/ arrange meetings / improve communication methods / quicker responses	8%	-4%
Better understanding of all issues participants facing	7%	+2%
Improve / review processes / activities / reporting methods	7%	+1%
Guidance/ measures / issues relating to Covid-19	5%	+5%
Clearer & simpler processes / more consistency / more proactive on grey areas of code	4%	=
More supportive on systems/ processes	4%	-5%
Improve co-ordination/ speed/ resource available for change/ mods	4%	-5%
Accessibility of data / information / more reliable data services	3%	-3%
Be more flexible/ not dictated to by e.g. BSC	3%	-3%
Better website / easier to use	3%	+2%
More stability / better continuity / consistent in staff / more staff	3%	+2%
Satisfied / cannot think of any improvement at present / everything is fine	8%	+4%
Don't know	45%	+14%

Of which…
53% People service issue
30% Systems service issue
23% Something else
15% Don't know

QB4b What, if anything, would you most like Elexon to improve on in the next 12 months?
QB4c: Thinking about where you would most like ELEXON to improve, would you say that this is mainly a 'systems' service issue or a 'people' service issue, or something else?

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Base: All who think service has stayed the same/ got worse 2019 (77)/ 2020 (73)

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1 in 5 (19%) still recognise improvement this year. Response to Covid-19 along with handling and communication of change have been key reasons for this.

What feel Elexon has particularly improved on in the past 12 months

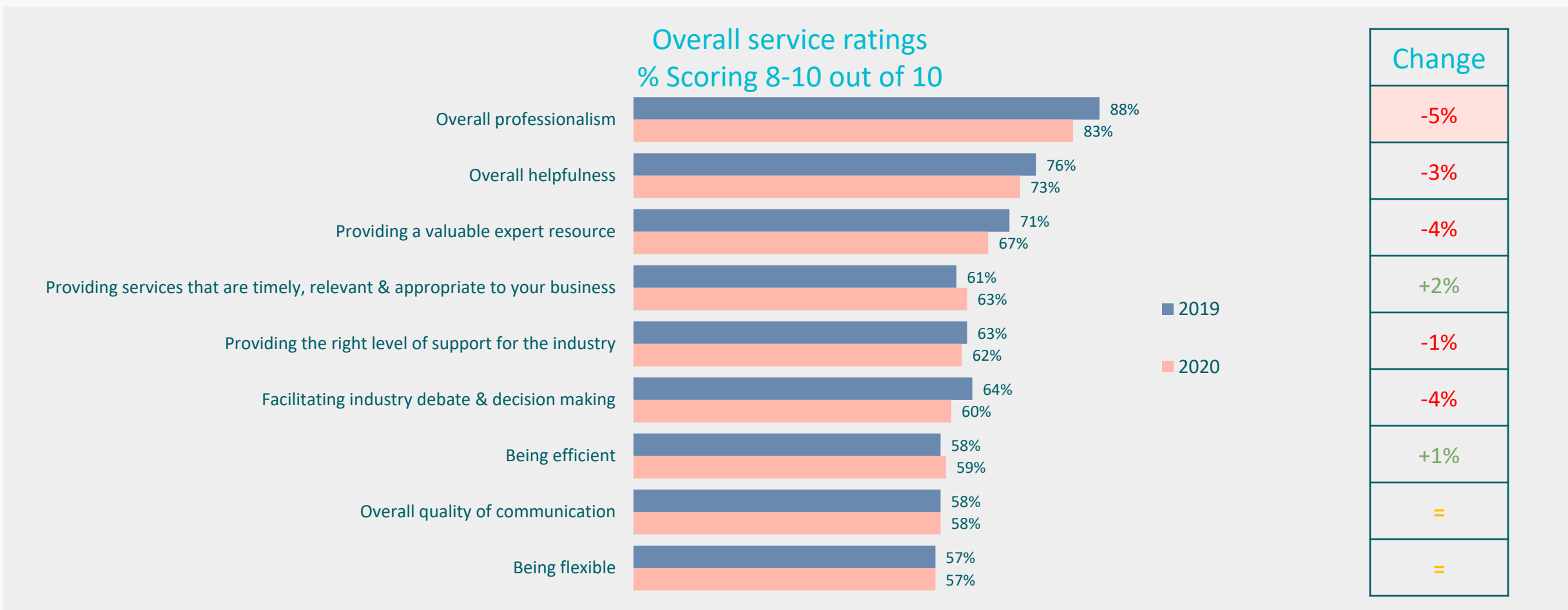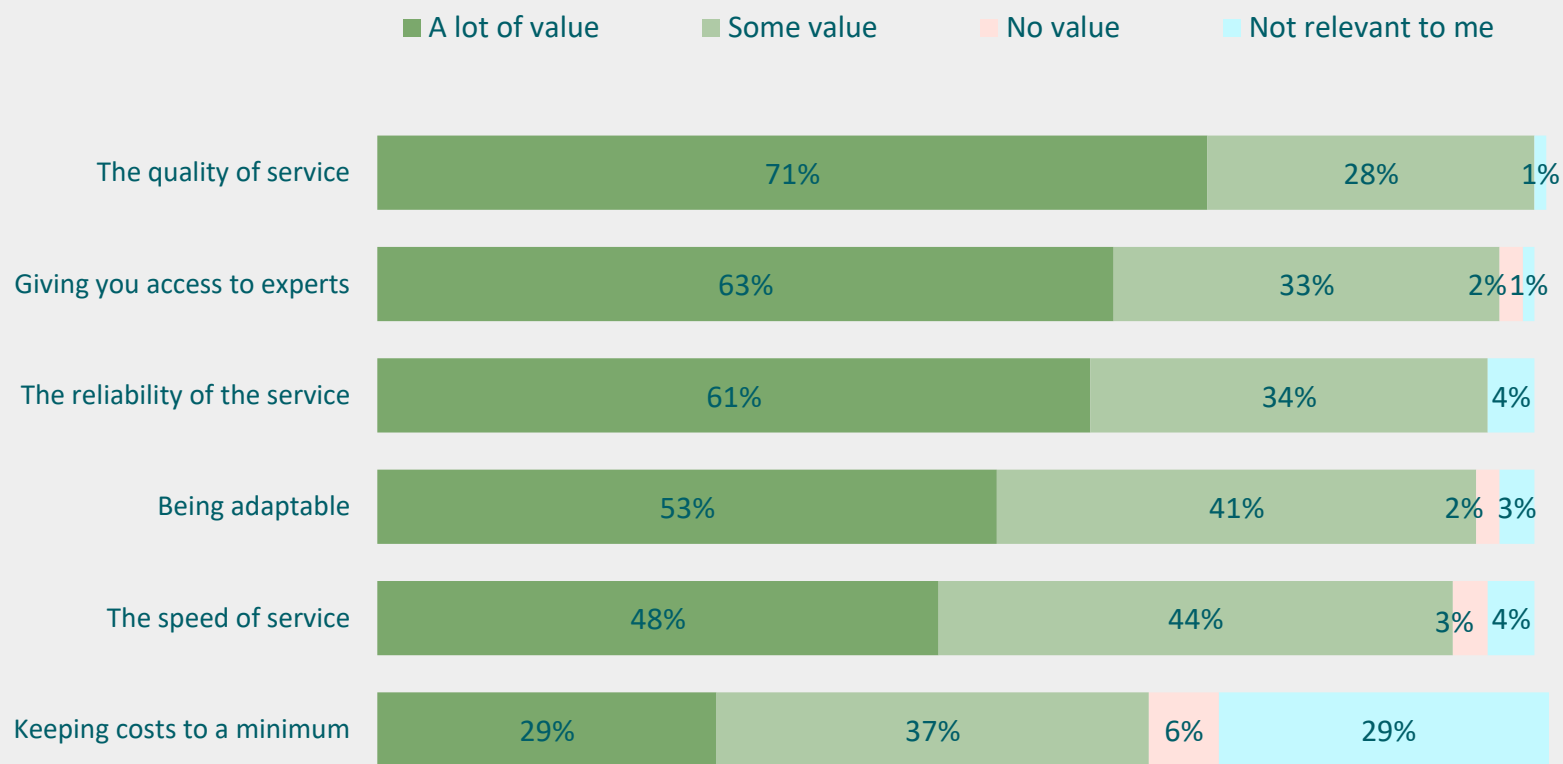| Category	Percentage
Covid-19 / forward thinking / flexible / quick reaction / taking impact into account	29%
Helpful / actioning issues / improvements to BMR's / facilitating tricky change proposals/ opening more energy market data	24%
Communication / communication of changes / information given	24%
Industry engagement / more supportive / more flexibility around EFR process	18%
Weekly performance reporting / reports / easy to understand / Newscast / good web conference meetings	18%
Overall service / professionalism in the business / good working relationship	6%
Lowering costs for non-BSC	6%
Workgroups / good standard of staff running work groups / efficient productive manner	6%
Don't know	18%

There has been very little change in rating of our 9 detailed service attributes. The largest fall has been for Professionalism, but this is still the highest rated.

Overall service ratings
% Scoring 8-10 out of 10

Attribute	2019	2020	Change
Overall professionalism	88%	83%	-5%
Overall helpfulness	76%	73%	-3%
Providing a valuable expert resource	71%	67%	-4%
Providing services that are timely, relevant & appropriate to your business	61%	63%	+2%
Providing the right level of support for the industry	63%	62%	-1%
Facilitating industry debate & decision making	64%	60%	-4%
Being efficient	58%	59%	+1%
Overall quality of communication	58%	58%	=
Being flexible	57%	57%	=

QB1: We'd like you to rate ELEXON on several attributes on a scale of 1 to 10, with 1 being poor and 10 being excellent. Just to remind you we only want you to think of your dealings with ELEXON in the last 12 months in relation to the BSC.
Base: 2019 (112)/ 2020 (90)

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Expertise and the quality and reliability of Elexon's service remain most valued. With Covid-19, the importance of adaptability has grown.
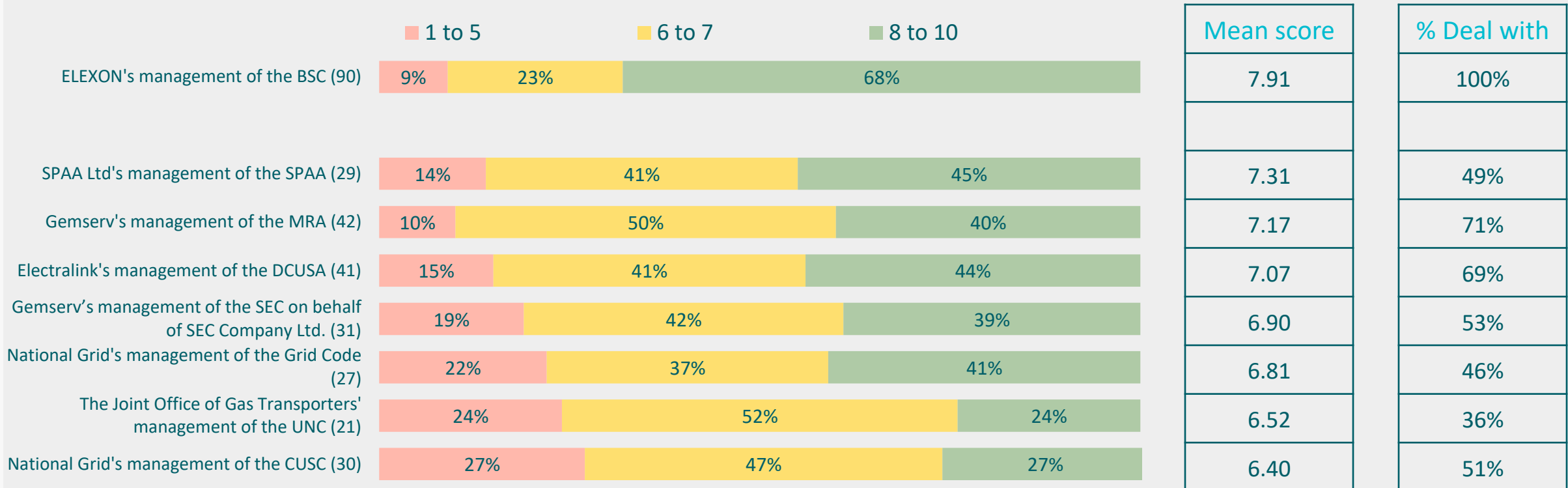
How much value key aspects of Elexon's service

Legend:
- A lot of value
- Some value
- No value
- Not relevant to me

Aspect	A lot of value	Some value	No value	Not relevant to me	Change vs 2019 (% A lot of value)
The quality of service	71%	28%		1%	+2%
Giving you access to experts	63%	33%	2%	1%	-8%
The reliability of the service	61%	34%		4%	-5%
Being adaptable	53%	41%	2%	3%	+16%
The speed of service	48%	44%	3%	4%	-6%
Keeping costs to a minimum	29%	37%	6%	29%	+2%

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Elexon is rated favourably relative to other code admin bodies (by those dealing with each) for its management of the BSC, albeit on a partial sample.

Rating of management of each code admin body
(1=Poor, 10=Excellent)

Legend: ■ 1 to 5   ■ 6 to 7   ■ 8 to 10

	1 to 5	6 to 7	8 to 10	Mean score	% Deal with
ELEXON's management of the BSC (90)	9%	23%	68%	7.91	100%
SPAA Ltd's management of the SPAA (29)	14%	41%	45%	7.31	49%
Gemserv's management of the MRA (42)	10%	50%	40%	7.17	71%
Electralink's management of the DCUSA (41)	15%	41%	44%	7.07	69%
Gemserv's management of the SEC on behalf of SEC Company Ltd. (31)	19%	42%	39%	6.90	53%
National Grid's management of the Grid Code (27)	22%	37%	41%	6.81	46%
The Joint Office of Gas Transporters' management of the UNC (21)	24%	52%	24%	6.52	36%
National Grid's management of the CUSC (30)	27%	47%	27%	6.40	51%

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Key implications for Elexon

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General implications and action areas

Current pillars of Elexon's success

Quality of service

Reliability of service

Access to expertise and knowledge

Key action areas

Keep eye on the ball/ don't let standards slip

Continual improvement/ modernisation of systems

Ensure remote working not getting in the way

Building for the future

Adaptability to changing outside world

Increasing expectations (from tech)

Diverse customer needs and challenges

Key action areas

Continually adapt/ modernise systems & processes

Work hard to understand individual customer needs

Facilitate accessible, customisable touchpoints

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Key action areas – specific streams

Communications

- Tailor comms to different customer types.
- Improve 'customisability' of comms platforms (circulars, portal, newscast).

OSMs

- Strive for consistent quality, frequency and speed of contact
- Focus on OSMs understanding the business needs and challenges of individual customers.

BSC Change

- Keep doing what you are doing.
- Can scheduling of changes be staggered to make workloads more manageable for parties?
- Simpler/ clearer comms/ content.

Digital future

- Continue building awareness of the digitalisation programme.
- Provide regular updates.
- Explain road map and key benefits
- Use website and other touchpoints to keep informed.

Committees

- Follow up to investigate concerns about reduced quality of meeting papers and identify appropriate remedial action.
- General issue or specific to certain meetings?

Performance Assurance

- Continue to build awareness of changes to deployment of PAF.
- Follow up on any individual issues raised (via very specific/ technical verbatim responses received).

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Thank you

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