



ElectraLink

Customer Research Report

2021

djs
research

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INTRODUCTION

For over a decade, ElectraLink has commissioned independent customer satisfaction research every year. The results allow us to understand customers' needs and how well we are meeting them, as well as to determine what improvements can be made.

The insight gathered is utilised within our business plans for the following year and, thanks to historic data, we can track the long-term impact of our actions and continually improve our service to customers.

2021 has been hailed as a transformational year as businesses around the world have continued to adapt to an ever-changing landscape alongside the pandemic. At ElectraLink, this has meant the adaptation of our services to focus on the aspects that both support the industry and provide our customers value.

In Q3 of 2021, the management of codes of SPAA, SMICoP and theft arrangements within SPAA's remit transferred to REC, a transition that ElectraLink has and will continue to support. The result of this means that references to Governance Services within this report will be weighted towards DCUSA.

Before we delve into the findings of the 2021 report, overleaf is a summary of the actions that were highlighted as 'next steps' based on the 2020 survey.

2020 findings	We said we would...	What we did...	The impact...
Data Transfer Service (DTS)			
There was a drop in satisfaction in the administration of change requests.	Investigate the cause through a new account management approach as part of a broader review of all DTS policies and processes.	Rolled out new account management approach, allowing for more targeted communication with our customers and better support through change requests.	Customers reached out to their account managers and satisfaction increased in the 2021 results.
There was scope to improve our DTS broadcast emails.	Explore ways to make these emails more targeted and overhaul our reporting approach, ensuring it is focused on the information our customers want.	Focused on streamlining content to highlight key information and how to access it.	The rating for this channel rose to over 8 (8.3 vs 7.9 in 2020).
Not all customers were taking advantage of the full spectrum of DTS products and services.	Engage with our customers to ensure they understand the full range of available services and work with them to understand their needs.	Hosted account management sessions to increase understanding of our products/services.	Increased usage of DTS services and adjustments to the offering to better suit customer needs.
The User Group is a vital aspect of the DTS service, but more could be done to maximise the value it brings.	Work with the DTS User Group to improve understanding of their role with the broader DTS community and explore ways to support innovation on the DTS.	Increased transparency within the user group and created a newsletter to highlight where users can find information.	79% of respondents are aware of the DTS User Group and knowledge of who and how to contact the team has increased by 20 percentage points or more since 2020.
Governance Services (GS)			
Respondents felt that flexibility, offsetting and alternative fuel sources represent key future challenges in the energy industry that ElectraLink could support.	Continue to increase our engagement with the industry to better understand the role ElectraLink could play in addressing these challenges.	Throughout 2021 we worked with our customers to further develop our Advisory Services offering.	This work included a project with SSE looking at flexibility. Moving into 2022 we will continue to work to understand where we can add value.
There was a drop in the perceived value for money for our codes.	Continue to work with our customers to ensure that all our activity is viewed as good value for money and that the cost to serve for the codes is made more visible so that it is clear what is received for the money spent.	We worked closely with the DCUSA board to ensure we fully understand their needs and therefore the service we provide brings value for money.	30 percentage point increase in value for money score from 50% in 2020 to 80% in 2021.
Our respondents identified support during the REC transition as a service they would like ElectraLink to provide.	Continue to proactively support the transition of SPAA, SMICoP and Theft to REC so that it is ready to go live on 1 September 2021.	We provided documentation, data, guidance and training to prepare RECCo for taking over responsibilities and enabled parties to access legacy resources beyond implementation.	The SPAA closure report, which reflects on the transition of other codes and theft arrangements within SPAA's remit, stated the closure plan was successfully implemented.

Leading on from this, the 2021 results reveal that:

- Satisfaction with the service received from the DTS is similar to 2020 (2021 mean score of 8.1 cf. 8.2 in 2020) and is in line with 2019.
- Technical competence is still the most important quality for a service controller to demonstrate in 2021, followed by being responsive, communicating clearly and understanding business needs.
- The DTS' perceptions of service have improved this year, with administering of change requests showing a particular improvement (2021 mean score of 8.2 cf. 7.5 in 2020).
- The vast majority (84%) are aware of FlowBuilder and WebTools (82% - up from 56% in 2020); over two thirds (68%) are aware of FlowAlerts; and half (50%) are aware of the Single Energy Market Data Catalogue (SEMDC).
- The majority (74%) are familiar with their CSS obligations, and almost all of those who it applies to already have planning in place.
- Almost four in five (79%) are aware of the DTS User Group (up slightly from 75% in 2020), while knowledge of who their DTS rep is and how to contact them has increased by 20 percentage points or more since 2020.
- Overall satisfaction (mean and percentage) for GS remains consistent with previous years at 7.9 and with 63% providing a rating of 8-10 out of 10.
- For GS, perceptions of the various support channels have increased in 2021, with training in particular showing marked improvement (mean score of 9.0 up from 8.0 in 2020).
- Within GS, value for money satisfaction has increased to 80%, and is at an all-time high.

We intend to build on the feedback we have received in 2021 to continue to improve the experience and services for our customers, including understanding which large industry change programmes we can provide support for to better serve the market as a whole and our customers.

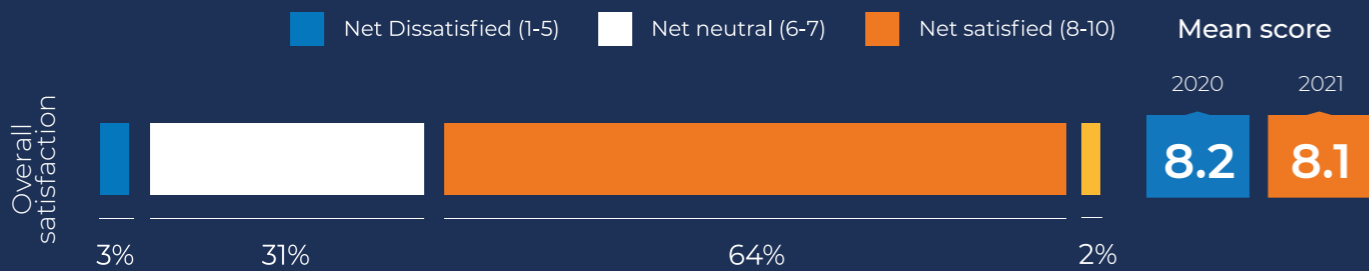
DTS CUSTOMER RESEARCH

Overall satisfaction

As a crucial element of the GB energy market, DTS customer satisfaction is of high importance to ElectraLink. Therefore, the finding that the majority of customers (66%) were satisfied and that the percentage of dissatisfied customers dropped from 4% to 3% are points of pride for us.

Identifying ways in which we can continue to maintain a mean score for overall satisfaction in the region of 8-10 is at the forefront of our planning, and, in 2022, this will mean:

- Improving the understanding of the User Group and services available by simplifying the way in which information is found and accessed.
- Evaluating the account management sessions to tailor them to meet differing customer needs.
- Reviewing how we communicate changes to ensure updates are delivered in a timely and concise manner.



What our customers say about us

"The speed of the responses and the accuracy. If I ask for help the guys provide it quite quickly."

"In general, the gateway works very well, and does exactly what we want it to do."

Engagement

Helpdesk

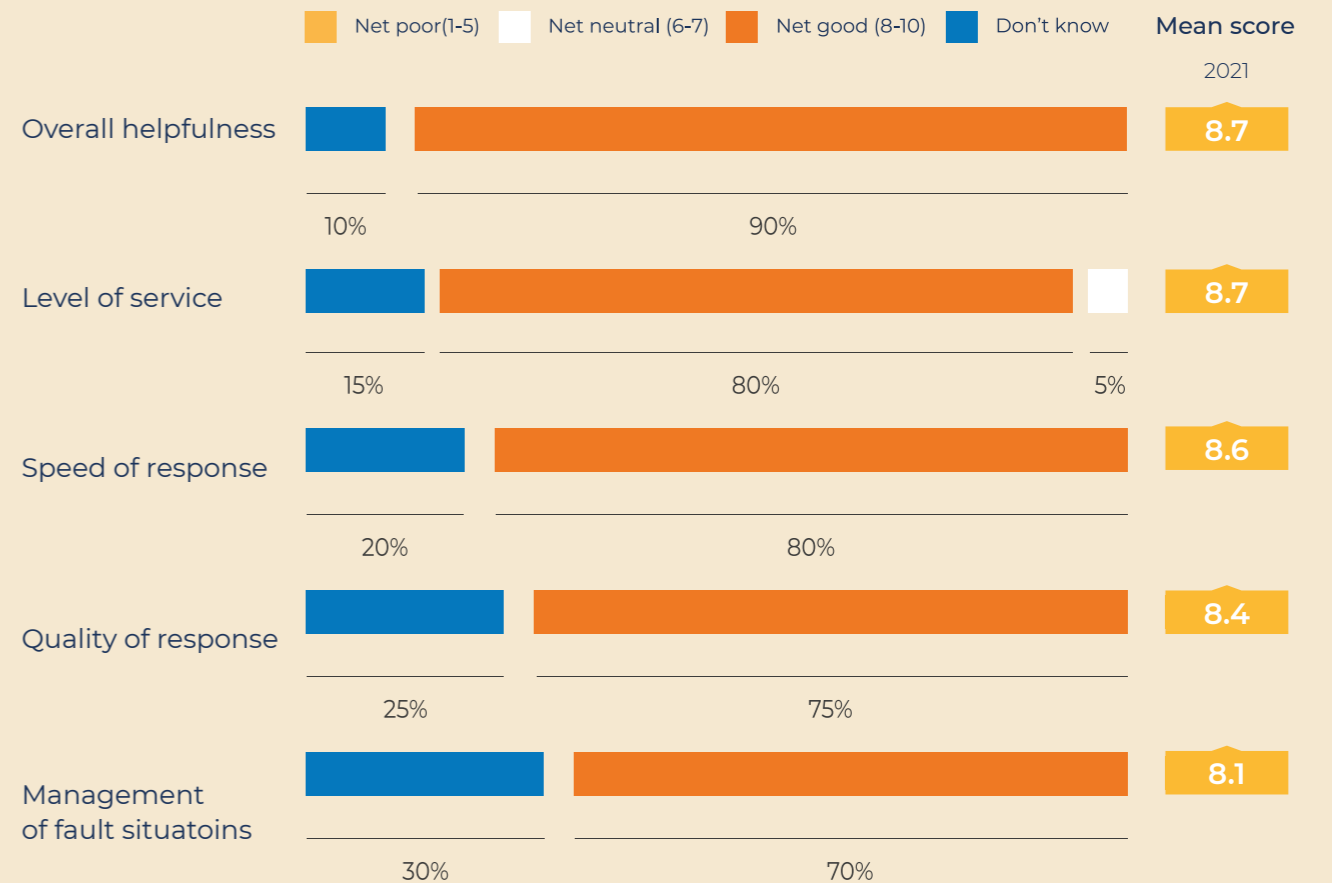
A key aspect of service is the ability to proactively engage and communicate to keep customers informed and receiving support as required.

This year, we found that of those that utilised our helpdesk, 85% used phone or email while 15% used web chat. This is a change from 2020 when 91% reached out via phone or email and only 9% utilised web chat, which demonstrates how habits continue to change throughout the pandemic.

"When I do need them there is a help channel on their website that always provides a quick response, so you are not sat around waiting"

"... we have a named contact to speak with and prefer to get in touch that way."

Perceptions of the quality of service through the helpdesk has improved since 2020 across all measures and no one provided a 'poor' (1-5 rating) response. Improvements were most notable across the consistent level of service and speed of response factors. Additionally, the average of all factors has improved since 2019 (8.3) to 2021 (8.5).

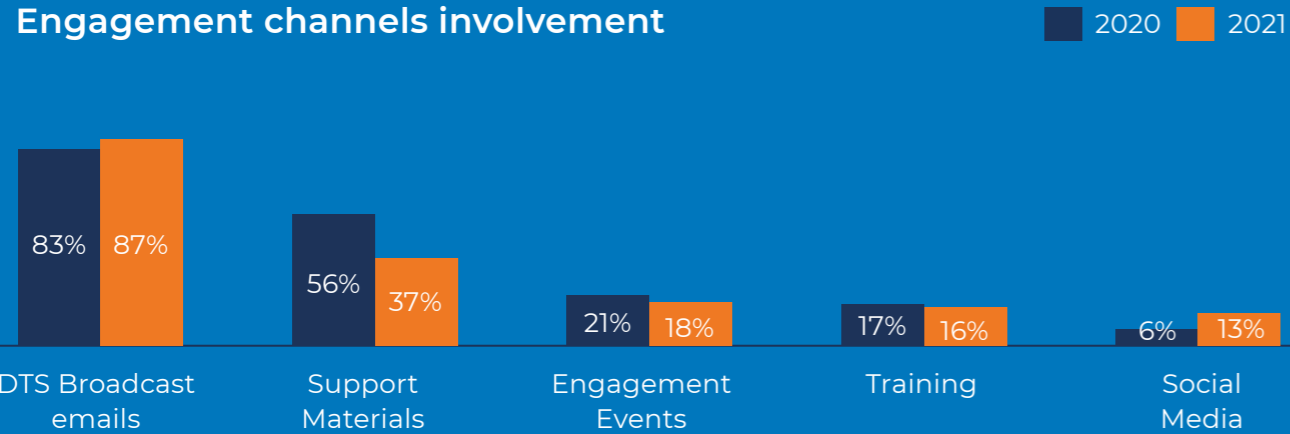


Other channels

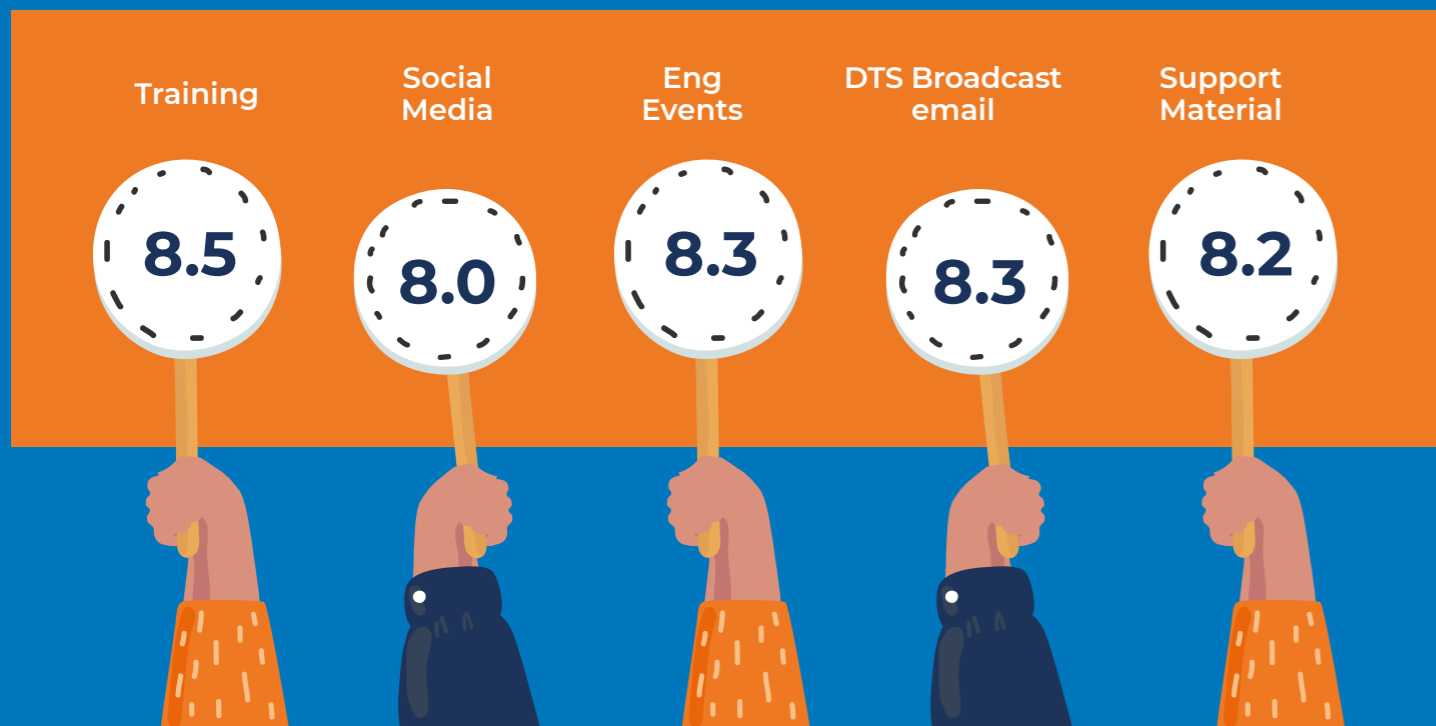
Data best practice and digitalisation is a focus at ElectraLink, and this is evident across all business areas. Our channels for communication are no different, and in recent years we have invested (and continue to invest) in our online mediums to enable our customers to interact with us in the ways most suitable for them. It is not surprising then that as we have adjusted to a hybrid way of life, channels such as social media and email have become more popular.

While involvement with events has waned, this is to be expected given the reduced number of events hosted and attended by ElectraLink with changing restrictions. However, in 2022, getting back in front of our customers and engaging with the industry, both face-to-face and virtually, will return, particularly in H2.

Engagement channels involvement



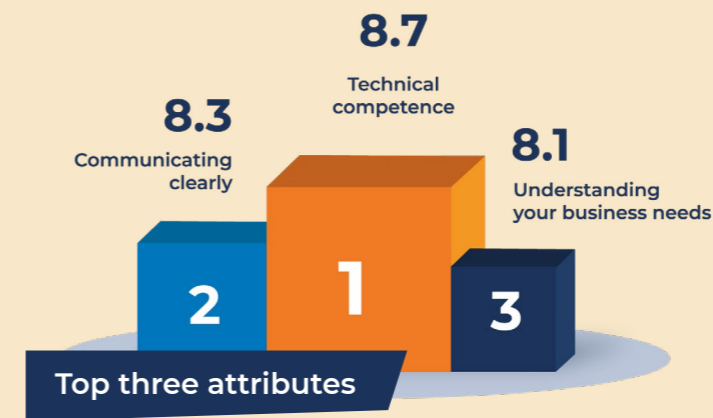
Rating of engagement channels



DTS Deep Dive

Key performance measures

We were pleased that the satisfaction scores for the majority of our DTS services increased and that of the 10 primary attributes of the DTS, in 2021 the overarching mean score stood in a 'net good' position at 8.4. The top three attributes were technical competence, communicating clearly and understanding business needs, closely followed by being responsive and value for money.

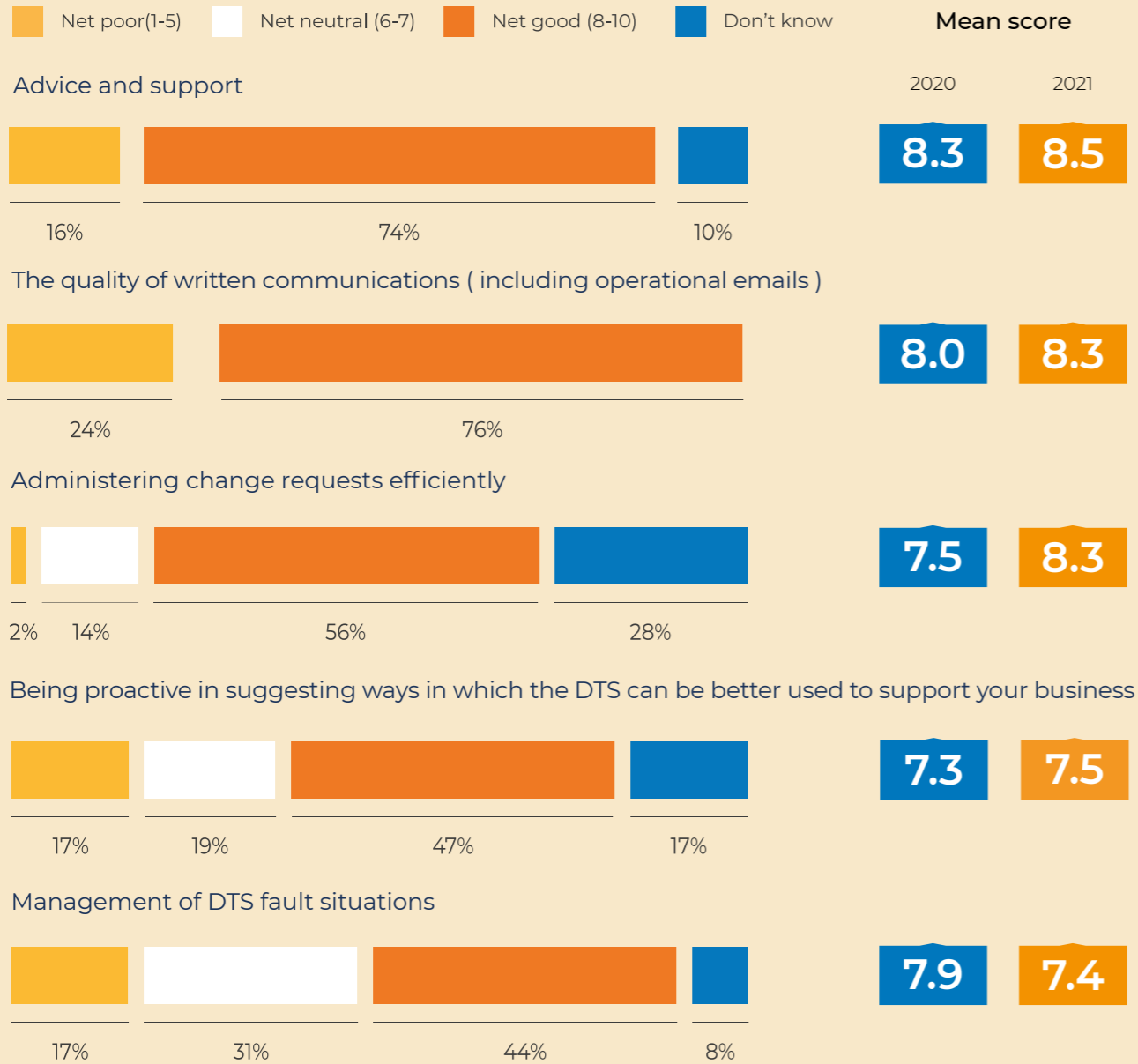


The average across all attribute ratings has improved since 2019, moving from 8.2 to 8.4 meaning ElectraLink is firmly in a 'net good' for these service attributes.

	2019	2020	2021
Overall professionalism	8.8	8.7	9.1
Being responsive	8.5	8.5	8.8
Being easy to work with	8.6	8.4	8.8
Technical competence	8.2	8.4	8.7
Providing a valuable expert resource	8.3	8.5	8.3
Communicating clearly	8.0	7.9	8.3
Proactive approach	7.8	7.9	7.8
Being forward thinking	7.7	7.5	8.1
Understanding your business needs	7.7	7.9	8.1
Training provision	n/a	7.5	8.0

Service aspects

Based on feedback, we focused on improving service for administering change requests effectively and we're pleased to see an increase greater than our target, reaching a score of 8.3% which surpassed the previous two years.



Value for money

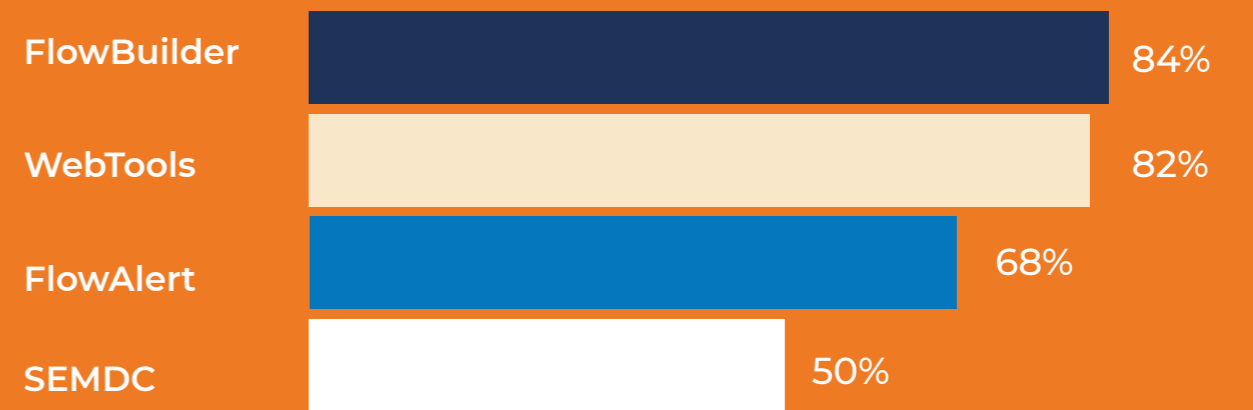
Value for money remains a core focus and we recognise that general market factors alongside a challenging two years of trading for most businesses have raised the expectation for value. So, it is not surprising to receive comments such as "like anything you just wish things could be cheaper". However, in contrast, we were pleased to receive feedback such as "it's remarkably cheap and we spend more on other services that are not providing the same value as ElectraLink" and "it's 10/10, an absolute bargain. The tools they provide around the DTS are really, really good and really cheap".

We understand that cost is a relative term and although the DTS is a not-for-profit mechanism, some costs need to be covered to ensure its smooth running. Therefore, although there are elements of the cost we cannot control, we strive to deliver value, and actively identify ways in which we can achieve this.

Additional services provided by the DTS

ElectraLink focuses on the future and proactively explores how it can improve existing services as well as the development and delivery of innovative solutions for an everchanging marketplace.

As part of this, we strive to enhance understanding of the full DTS offering, including the many services that are provided free to all DTS users. This year's results show that over four in five are aware of FlowBuilder and WebTools, just over two-thirds are aware of FlowAlerts and half are aware of the SEMDC.



Interestingly, providing support to manage industry change was identified as the most valuable improvement - over 60% of participants voted for this.

CSSConnect

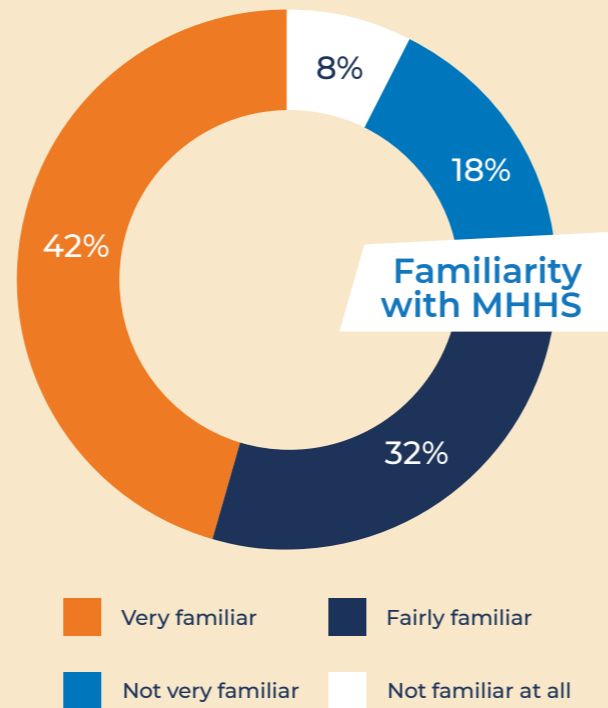


2020's results revealed that over three quarters were already familiar with the Ofgem obligations to connect to the CSS, and this is still the case in 2021. However, the proportion of those with plans in place has risen from 67% to 74% which is a positive outcome.

Market-wide Half Hourly Settlement (MHHS)

Feedback suggested we can add value through aiding the understanding of big change programmes that are happening in the market. In 2021, Ofgem launched a consultation on the electricity retail MHHS, so as part of this we wanted to look at current levels of understanding so we can adapt our support levels around this topic in future.

We found that while 74% of respondents were familiar with the MHHS programme, only 42% would describe themselves as 'very familiar'. Therefore, throughout 2022 ElectraLink will continue to engage with DTS users and the user group to understand how these changes will impact them.



The DTS User Group

The DTS User Group – which governs the DTS and the DTS Agreement (DTSA) – consists of a collection of market participants representing constituencies that cover the entirety of the DTS’s customer base.

With permission, we explore to learn how well our customers understand the User Group and highlight any potential improvements we could make. We found that since 2020, awareness of the DTS User Group and knowledge of who their representative is increased by 4% and 3% respectively.

Additionally, knowledge of how to contact reps, the act of raising questions and representatives communicating with participants have all increased by 20 percentage points or more since 2020.

79% aware of the DTS User Group
(cf. 75% in 2020)

50% know who their representative is
(cf. 47% in 2020)

MOVING FORWARD

Based on our findings, the areas we will bring into focus throughout 2022 for the DTS include:

- 1 A continued focus on the development and improvements to its service and experience attributes, including fault management, to ensure overall satisfaction remains high.
- 2 Working to ensure that any changes to pricing structures are well communicated and understood. We acknowledge that price sensitivity exists in our current climate and will remain mindful of this while exploring new ways to increase the value of the service.
- 3 Focusing on proactivity and suggestions on how the DTS can be better used to support businesses.
- 4 Generally, the DTS has performed well across all attributes in 2021, with 8 of the 10 attributes showing an improved mean score from 2020. We should look to maintain these levels into 2022.

GOVERNANCE SERVICE CUSTOMER RESEARCH

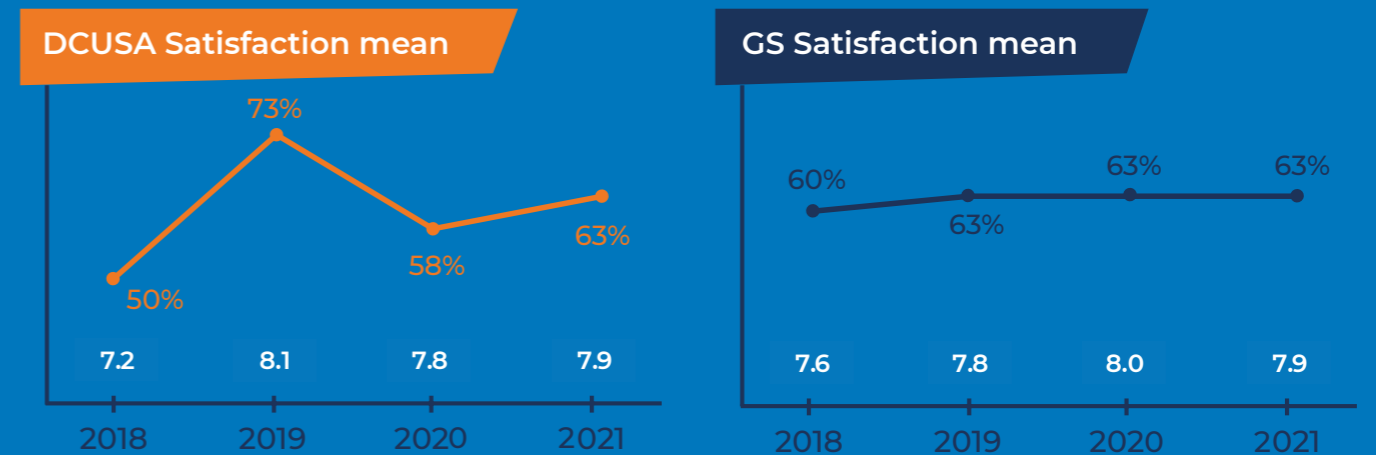
Transfer of the codes

In 2021, we provided support through documentation, data, guidance, and training to prepare RECCo for the responsibilities of the code remits merging with the REC. Beyond implementation, we continued to manage SPAA, SMICoP, and theft websites for parties to access legacy resources. Our sharing of knowledge and efficiencies helped to ensure that parties received continuity of service and experience.

The SPAA closure report, which reflects on transitions, stated the closure plan was successfully implemented with transfer of assets, knowledge and experience. Due to the transfer of other codes, this section focuses on DCUSA.

Satisfaction levels

The overall satisfaction percentage for Governance Services (GS) in 2021 is in line with 2020. However, in isolation, the DCUSA team's service has improved by 5% from 2020 and performed well with this year's scores increasing slightly both as a percentage and the overall mean.

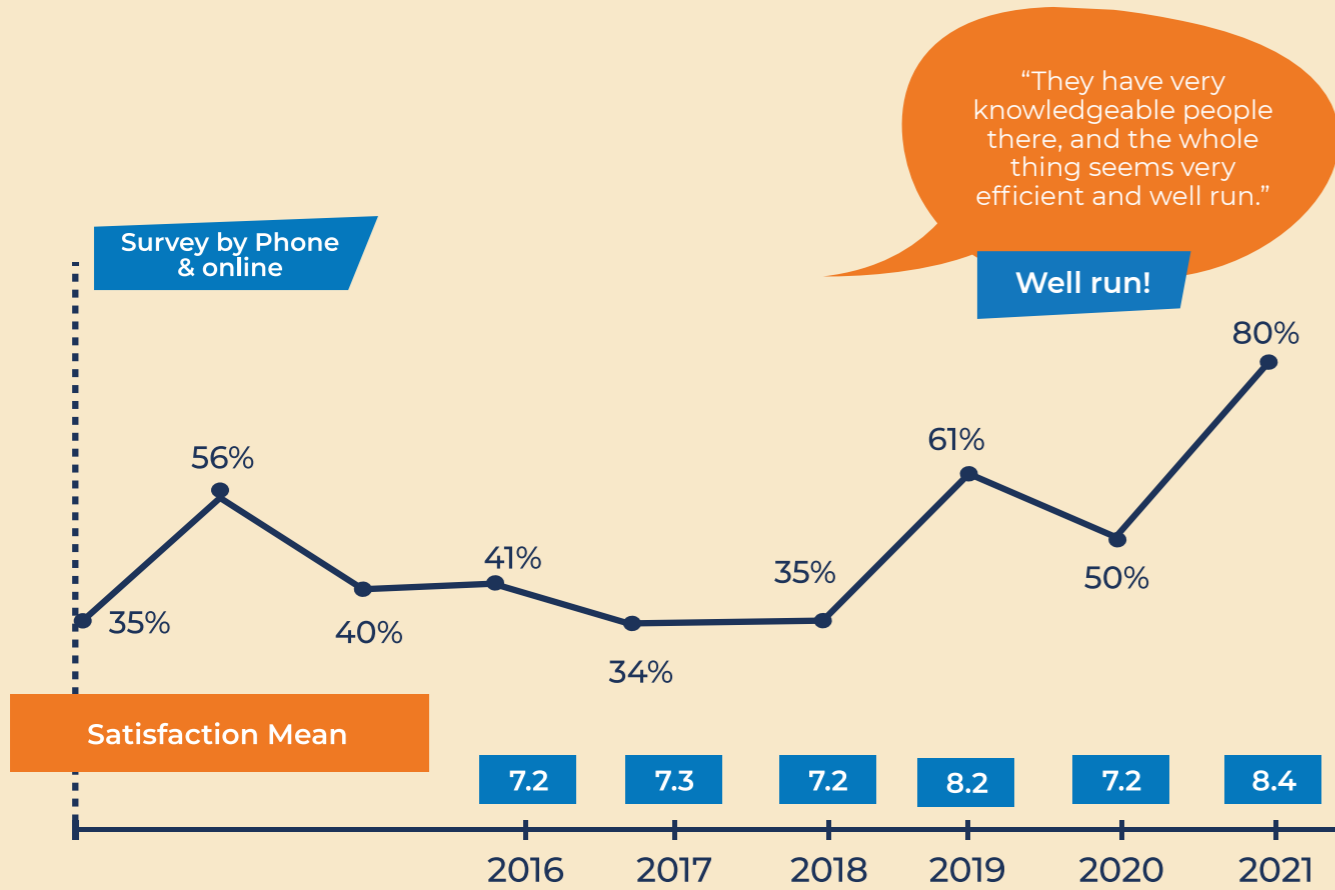


For GS, the change in the overall satisfaction, while minimal, will be investigated by reviewing the detailed feedback and will act to ensure our service to our customers is the best it can be.

Value for money

Ratings of value for money have increased markedly against GS 2020 ratings, with a 30 percentage point increase from 50% in 2020 to 80% in 2021.

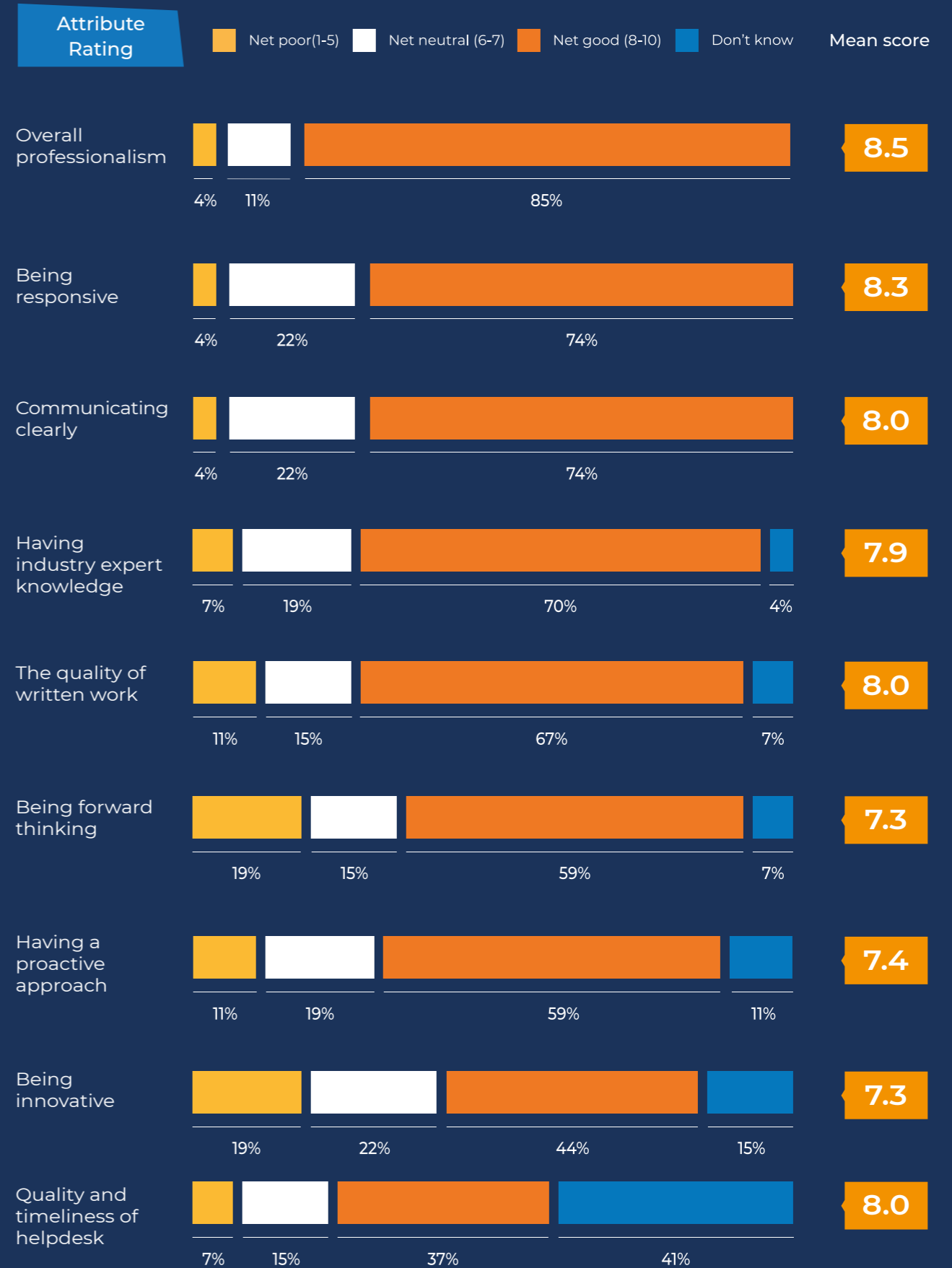
Excluding “don’t know” responses, value for money ratings of 8-10 is 89% in 2021, compared to 57% in 2020. And, when asked about the service in terms of value for money for DCUSA, the satisfaction mean has risen to 8.4%.



Service Attributes

Assessing the results of the service attributes provides a detailed view of how we are performing in key areas. Experiences of ElectraLink’s services during 2021 are broadly in line with 2020 – with the strongest perceptions being with overall professionalism and responsiveness. Having industry expert knowledge has increased, with a mean score of 8.5 compared to 8.1 in 2020.

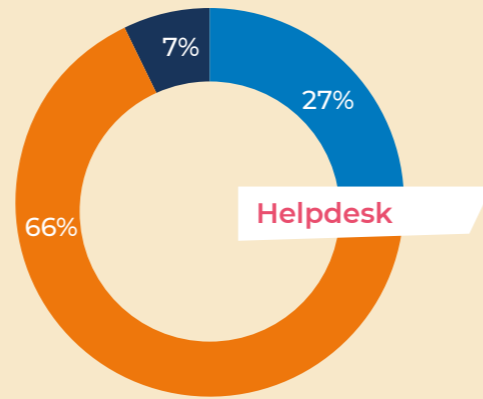
We have improved all service areas except the helpdesk, which will be a focus for us throughout 2022 as we review our wider channels of communication as part of our integrated communications strategy.



Helpdesk services

As we review our points of contact with customers, it is essential for us to understand both trends around channel preferences and then the experienced service level associated with each method.

Interestingly, of those who utilised the helpdesk, 66% contacted us via email, 27% by phone and only 7% by webchat, showing that email is still the primary form of communication for support.

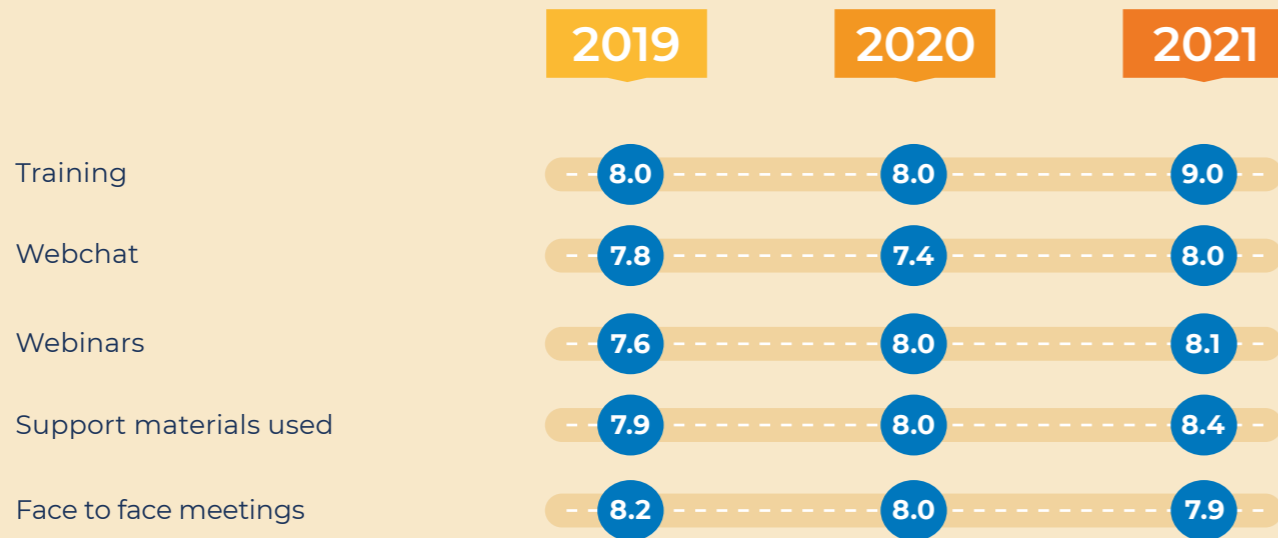


With regards to service for each of the helpdesk channels, results are wholly positive with all mean results in the 8-10 bracket.

Customer engagement & communications

We were pleased to see that satisfaction with the various customer engagement channels has increased across four of the five channels in 2021, with training (mean score of 9.0 up from 8.0 in 2020) showing particular improvement.

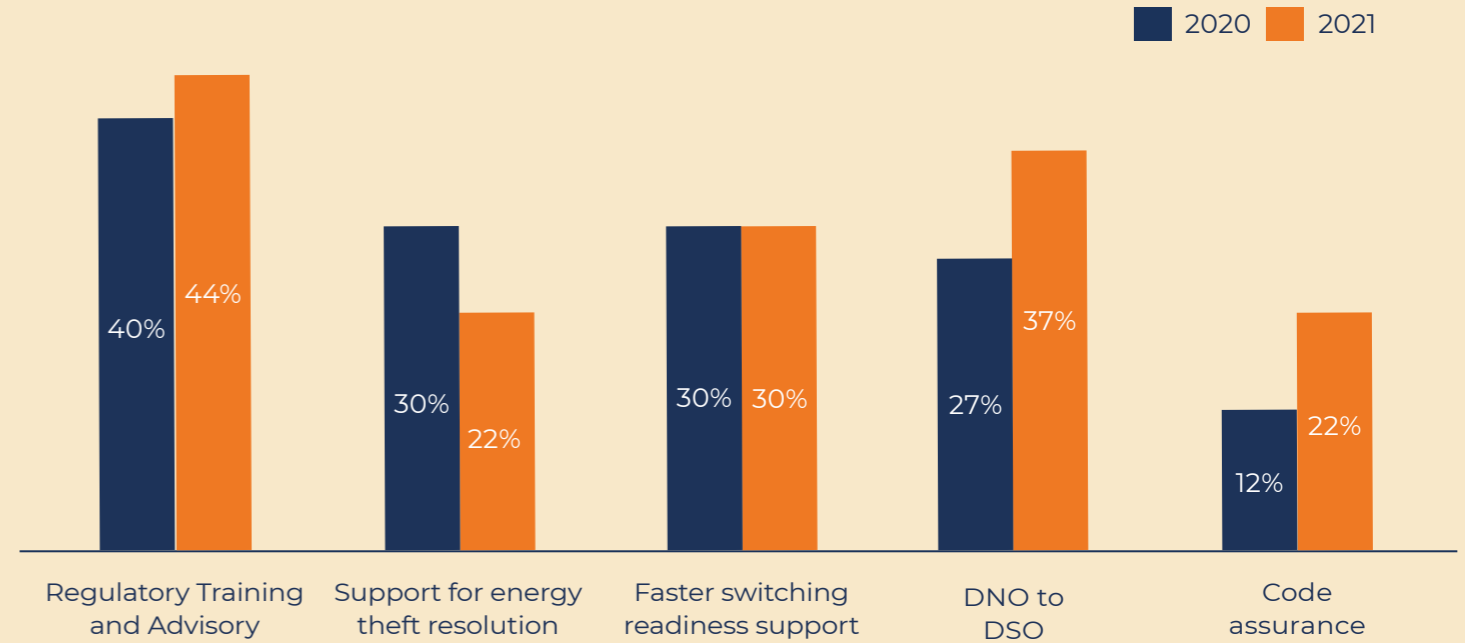
Understandably, the face-to-face meeting satisfaction has reduced slightly because of the changing restrictions throughout 2021.



From the customer comments, we identified frustrations with having to hold larger group conversations and training remotely which was perceived as less productive. In 2022, restrictions allowing, we intend to continue to provide remote sessions but are working to identify and facilitate face-to-face sessions where it is believed to add value (such as for larger groups). Another aspect raised was the navigation of the website, which will be another aspect that is reviewed as part of the ongoing communication review ElectraLink is undertaking.

Interest in additional services

While the service interest areas have stayed similar, there is a growing interest in the DNO to DSO transition. Additionally, the topics of flexibility markets and engagement with ENA Open Networks was proposed as new areas of interest.



What our customers say about us



MOVING FORWARD

Based on our findings, the areas we will bring into focus throughout 2022 for GS include:

- 1** Continuing to keep customers informed about the benefits associated with GS/DCUSA services
 - 2** Maintaining high service levels and keeping customers informed about the development of additional and new services to ensure value for money is provided and remains strong
 - 3** Re-evaluating the communication channels and strategy to deliver information in a timely and easily accessible manner (including the helpdesk)
-

ENERGY MARKET INSIGHT CUSTOMER RESEARCH

Overall satisfaction

ElectraLink provides Energy Market Insight (EMI) data to the electricity and gas markets.

We are interested in continuously improving our service in line with customers' needs, so in 2021 we included EMI in the customer satisfaction tracking programme.

The focus of the EMI research was to understand how well customers felt they had been supported, their overall satisfaction with the service they receive and its value for money, as well as how EMI could improve its customer service and product offering in future.

All of the customers involved rated support and satisfaction between 8-10 and were underpinned by positive experiences in relation to responsiveness, on-time delivery and provision of effective support when required.

The mean response in relation to value for money was 7, although commentary revealed that responses that were below the 8-10 range was due to neutrality and not being able to benchmark it as there is not another provider that mirrors the service.

Attribute ratings of the service ranged from 7-10 out of 10, with overall professionalism and understanding of business needs being particularly high (all ratings of 9-10 out of 10).

When thinking about improving customer service, the most useful additions are in relation to: 'consulting with you about the ways in which EMI are able to support your business and how it could support your business with future product developments'; 'broader advice on the market', and; 'support with navigating the regulatory landscape' – with all rating their usefulness as either very or quite useful.

"Rapid response when I need anything."

"The service is seamless and we have not had any issues with it."

"Anytime we have needed support from them they have been available and in a timely fashion... a very approachable company."

"We work in a very complicated industry with data changing on a daily basis, so I feel like they have an understanding and tailor their product to work with us."

MOVING FORWARD

Based on our findings, the areas we will bring into focus throughout 2022 for EMI services include:

- 1 Providing more information on the capabilities that can be utilised as part of EMI to support businesses
- 2 Exploring the most effective materials and ways for customers to engage with ElectraLink as there was a mixed bag of results regarding ways to interact and gain further knowledge of the tools provided by EMI
- 3 Assessing how additional value can be added to EMI services by focusing on new areas of interest highlighted in the feedback



ElectraLink

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The logo for djs research, with 'djs' in a large, bold, grey font and 'research' in a smaller, pink font below it, all contained within a white banner.

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