



ElectraLink

# Customer Research Report

2020

djs  
research

## Introduction

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## DTS Customer Research

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# INTRODUCTION

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Every year, ElectraLink commissions independent customer satisfaction research. This research allows us to understand how well we are meeting our customers' needs and helps us determine what more we can do.

The feedback we receive is invaluable and allows us to develop an action plan, ensuring continual improvement for the service we provide our customers.

2020 has been one of the strangest, most challenging years that most of us have experienced in our lifetimes, presenting challenges on a global scale that few would have predicted. This has brought about change in our industry and, for most, has involved adapting the ways we work. Despite this disruption to our lives, not all change that occurred in 2020 has been detrimental. It has also presented an opportunity to reflect on how we can build on this change towards a better future.

As an organisation, ElectraLink already had a well-established approach to flexible working and we believe that this experience allowed us to transition quickly and efficiently to new working practices. We believe that this ability to respond to change has been central to the excellent satisfaction scores we received in our survey in 2020. Our Data Transfer Service (DTS) mean satisfaction score was 8.2, a marked improvement against 2019, and value for money satisfaction increased to its highest recorded score since we began surveying our customers. For our Governance Services, our mean satisfaction score increased to 8.0, the highest score we have received in five years. Satisfaction across SMICoP, TRAS and ETTOS improved against 2019, while service delivery score improved for SPAA and DCUSA remained stable.

Despite these pleasing results, ElectraLink firmly believes in continual improvement and that engaging with our customers is the best way to ensure that the services we provide continue to meet our customers' needs. For that reason, we wanted to understand what lessons we could learn from the impact of COVID-19 and how we could improve our service delivery in the future, with a particular focus on the meetings our Governance Services manage on behalf of our Code customers.

Over two-thirds (69 percent) of our respondents felt they had experienced benefits from our Code meetings being held remotely in 2020. The main benefit experienced being less time spent travelling, followed by lower travel costs and lower carbon footprint. It was also felt that meetings held remotely allowed for greater participation for those who are unable to travel to meetings in person, resulting in greater parity for those market participants with resource constraints or based outside of London. We also discovered that only three percent of respondents wished to see a full return to face-to-face meetings, with most preferring either a fully remote approach or a hybrid where most meetings are held remotely but the more strategy focused meetings are held face to face.

We intend to take this feedback onboard and work with our Code customers in 2021 to agree on an approach that works for all once Government advice allows for face-to-face meetings to be part of our offering again.

2020 also represented a year of significant milestones for ElectraLink, including the successful migration of the Data Transfer Service (DTS) to Amazon Web Services (AWS). Running the DTS on AWS as opposed to the legacy setup will bring vast improvements to the energy market as data becomes increasingly necessary to underpin processes that support the transition to net zero.

DTS improvements thanks to the migration to the new Energy Market Data Hub (EMDH) platform include:

- **Improved scalability: The DTS is now running at five percent of load capacity on AWS and provides up to 16 petabytes of storage for the EMDH**
- **Improved performance: An increase in the speed of the DTS engine, reducing the time taken to process received files from 1 minute to 10 seconds, on average**
- **Better value for money: We have reduced DTS data traffic prices by five percent**

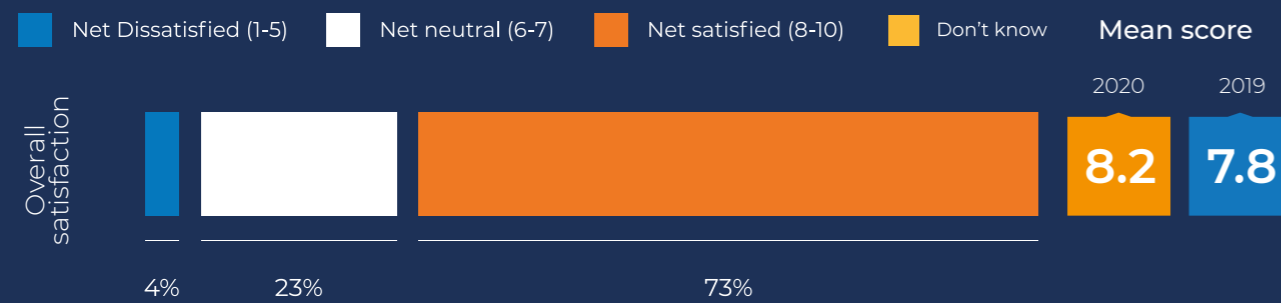
In 2021 we plan to take on the feedback we received through this survey to allow us to provide best-in-class service to our customers. ElectraLink will continue advocating for innovation and providing avenues for customers to share their ideas so we can better support their businesses with governance services and data and transformation services.

Thank you to all ElectraLink customers for another informative satisfaction survey and a busy and productive year. We hope that you continue to provide your feedback so we can meet your businesses' needs.

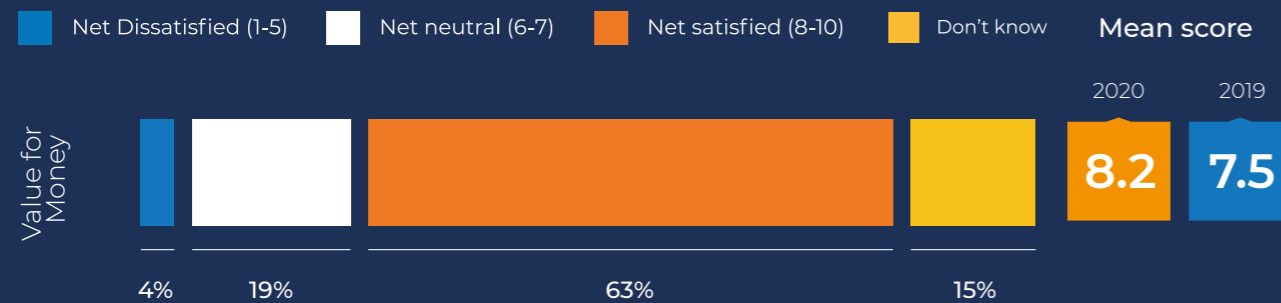
# DTS CUSTOMER RESEARCH

## Key measures

The DTS is a vital piece of infrastructure for the GB energy market so ensuring it remains fit for purpose and that our customers remain satisfied with the service we provide is of utmost importance to ElectraLink. Despite all the challenges presented in 2020, we have seen a significant improvement in the satisfaction scores compared to 2019, not only in terms of the mean score (increasing from 7.8 to 8.2) but also the percentage of our respondents who rated us net satisfied (a score between 8 and 10).



## Value for money

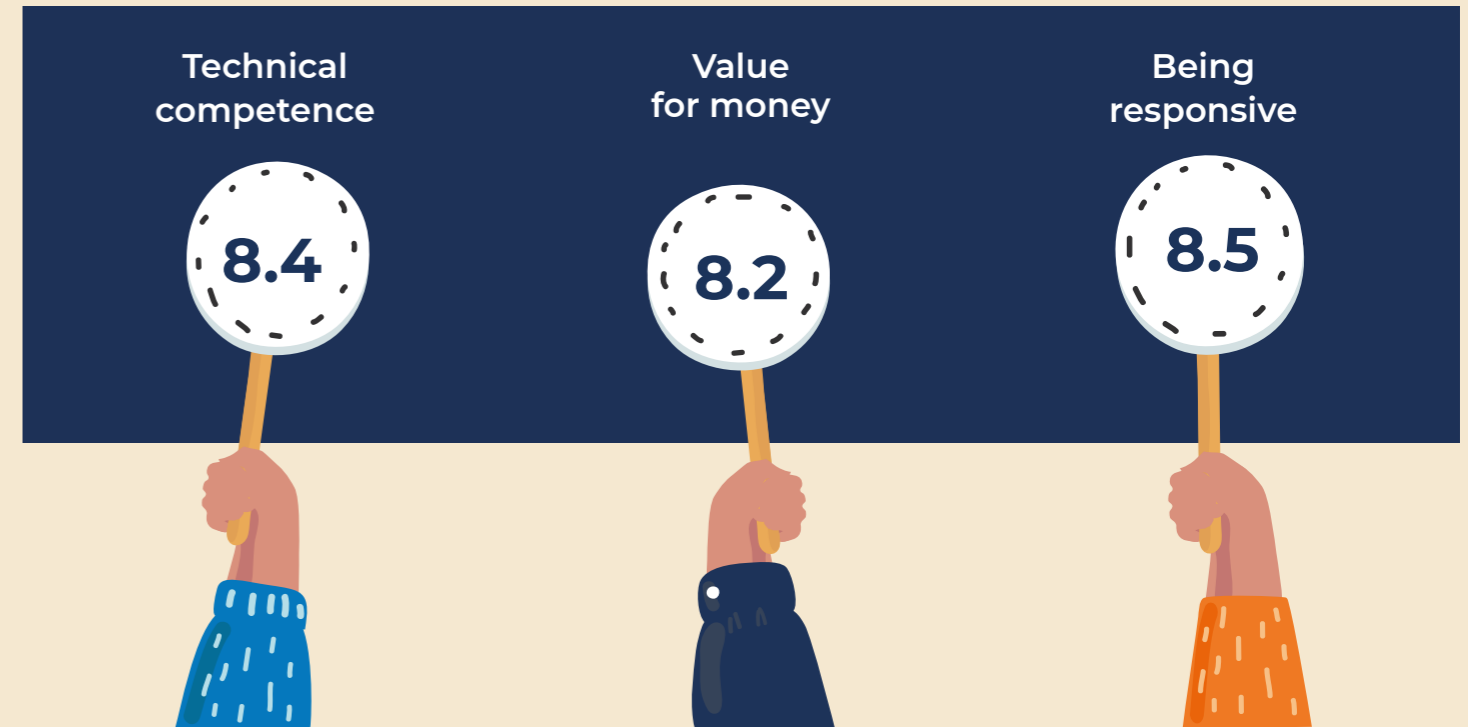


One of the key indicators for satisfaction for a centrally procured service such as the DTS is whether it is considered value for money, and for that reason, ElectraLink is continually looking for ways our service can be improved and identifying efficiencies wherever possible. In 2020, our focus on value for money allowed us to make a five percent decrease to traffic charges effective from 01 January 2021. This approach has resulted in our best value for money score since we began surveying.

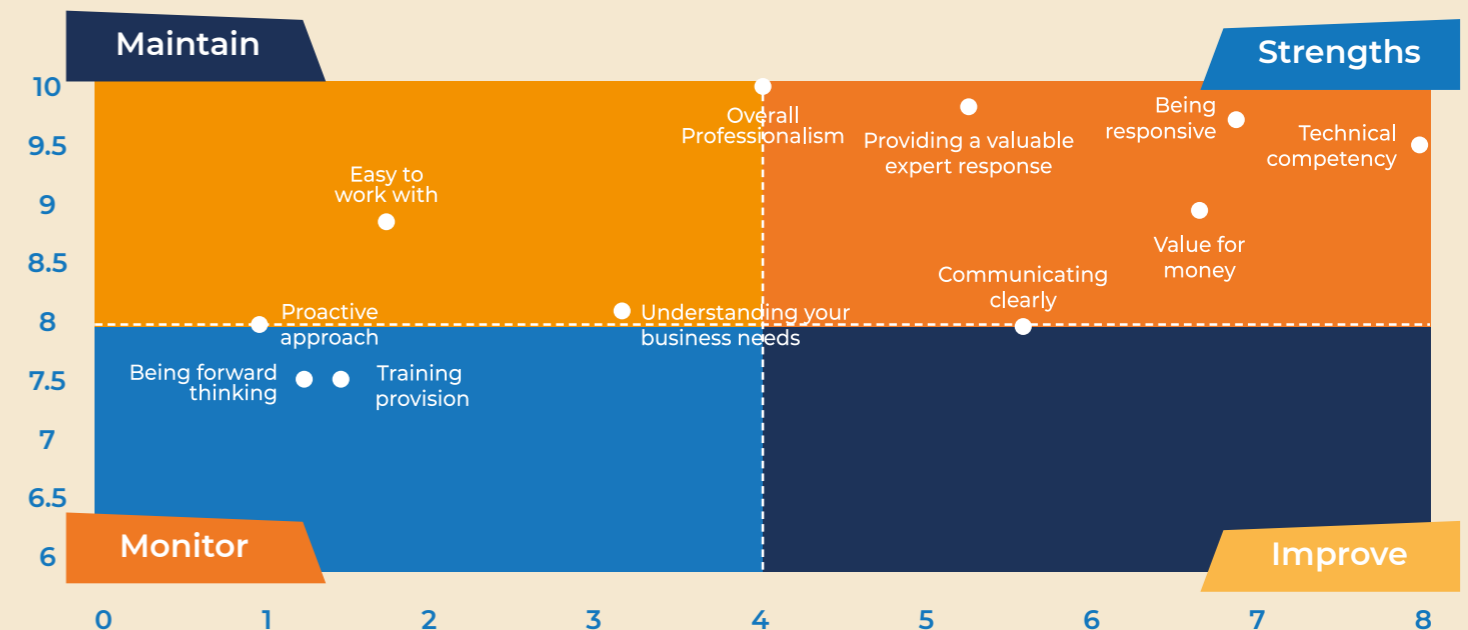
"The cost is very low compared to other industry costs we have to pay. Considering how important the DTS is, it's very good value for money."

## Key performance measures

We believe our customers should play a central role in setting our priorities so, as part of this research, we ask customers what matters most to them. Technical competence has consistently been the most important quality for our respondents, so we were pleased to see that our score has improved this year from 8.2 to 8.4. This year, being value for money as well as responsive has increased in importance for our respondents. 2020 saw us achieve our highest ever score for value for money and maintain an excellent score of 8.5 for being responsive.

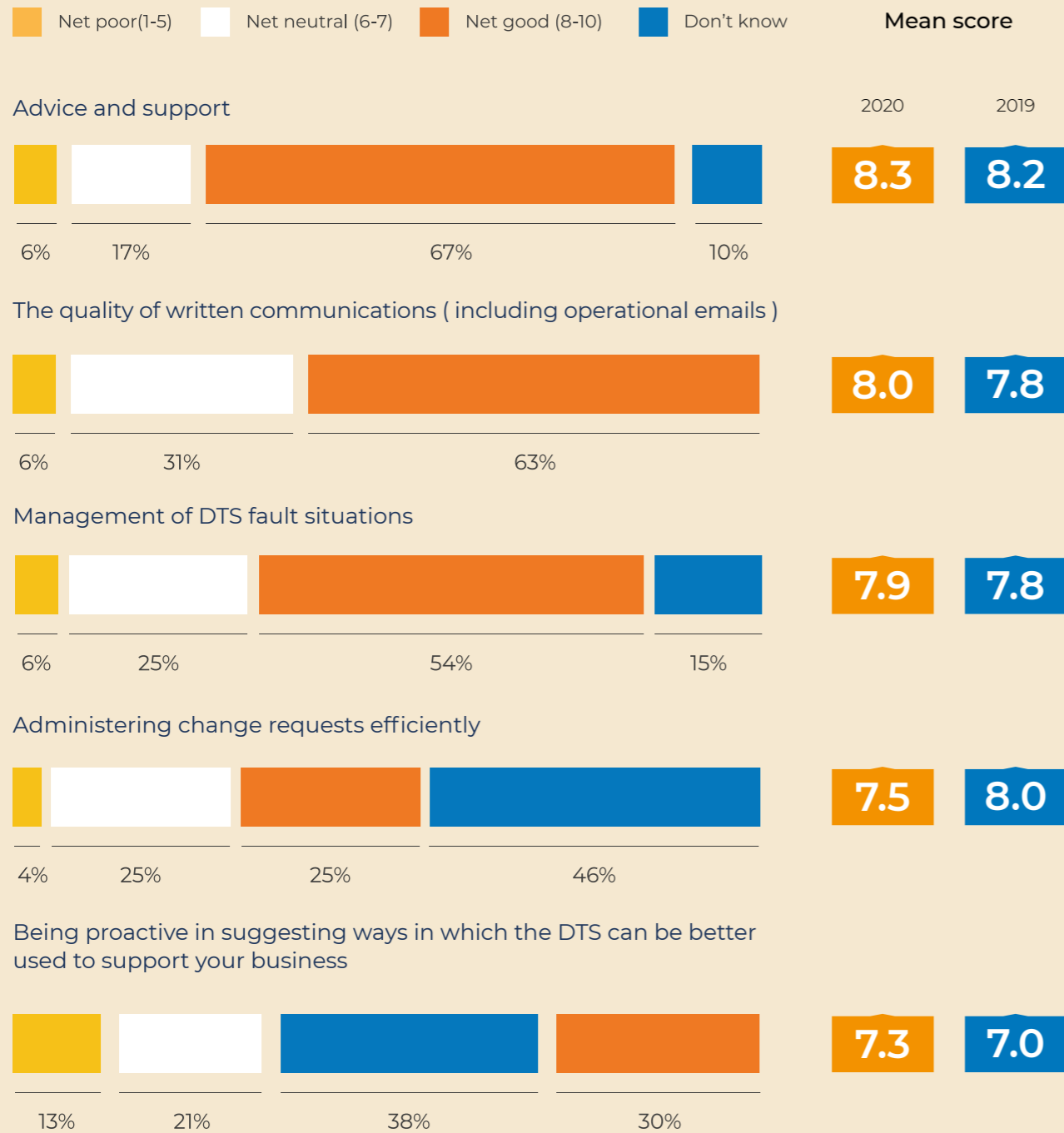


By plotting our results on a matrix that maps the importance to our customers of our key performance measures against our satisfaction scores, we have identified which areas we need to focus on for improvement, which is reflected in our action plans for 2021.



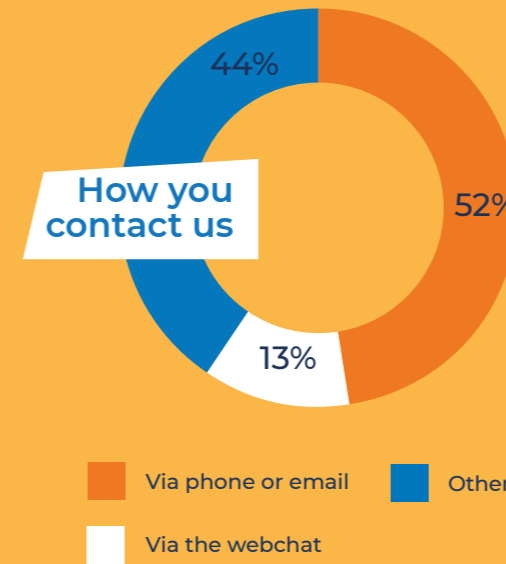
## Satisfaction with the services provided by the DTS

We were pleased to see satisfaction across almost all of our DTS services has improved against our 2019 scores, with the exception of administering change requests efficiently. In part, this may be because there were a lower number of change requests made in 2020, which could have been an impact of COVID (which explains why there has been an increase in those responding 'Don't know/not applicable' for this measure). However, we take all feedback very seriously, so we have built improving administration of change requests into our action plan for 2021.



## Engagement

We believe the best way to ensure the optimum service to our customers is continual engagement throughout the year. This includes both providing means for our customers to seek support from us and proactive engagement on our part.



## Support to our customers

Phone and email remain the most popular means for our customers to contact us for support, but across all our helpdesk channels satisfaction remains high for the service received, all of which received a score of 8 and above.

## Mean satisfaction scores



## Proactive engagement

We are pleased to see that satisfaction for our proactive engagement remains high, despite the challenges presented by the COVID pandemic. We were pleased to see an improvement in the satisfaction for our DTS.

## Additional services provided by the DTS

ElectraLink is focused on the future, continually evolving to improve and develop our existing services and deliver new solutions in a transforming marketplace. We don't wait for the market to identify problems; we use our market intelligence to anticipate issues and proactively deliver solutions.

Since its inception, the DTS has developed and grown to include many new services that are free at the point of use for all DTS users. It is important that our customers understand the full spectrum of services available to them so we wanted to understand how well these services were known to our customers at present.

While the results show there is a good level of awareness for the services we highlighted, we understand that there is more to be done to help our customers to understand how these services benefit them and meet their specific needs.

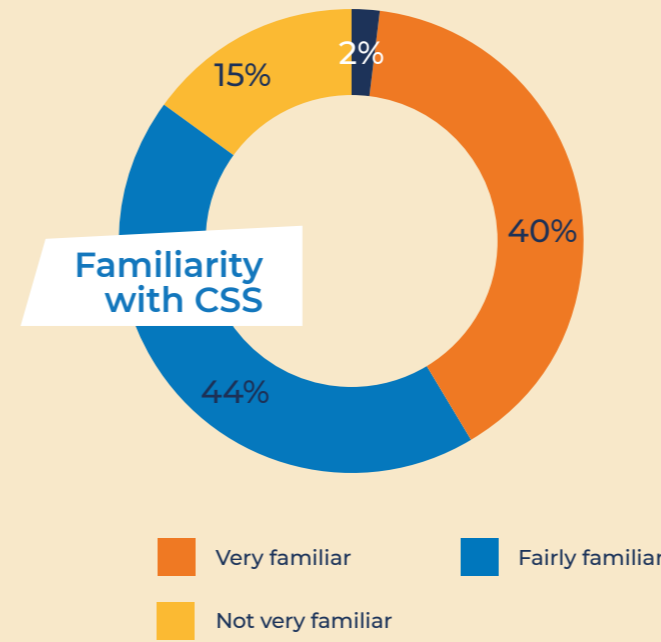
The Single Energy Market Data Catalogue (SEMDC) has the lowest level of awareness (56 percent) although this was to be expected as this service only launched in September 2020. The SEMDC is the GB energy market's first combined electricity and gas data catalogue, developed to reduce complexity in the currently overcomplex energy market. It improves market accessibility by providing access to a range of simplified items, such as data flow obligations, code obligations, and data interface documents, all in digital formats. This will reduce overhead and make navigating the energy market even easier.



### CSSConnect



CSSConnect is a Central Switching Service (CSS) adaptor solution that ElectraLink developed to deliver faster switching for energy market consumers. Built on the same infrastructure and integration points with market participants as the DTS, CSSConnect is provided to the industry as part of the regulated DTS Agreement (DTSA), facilitating near real-time communication between market participants and the Central Switching Service.



We believe that this adaptor offers a low-risk option for our DTS customers to connect to the CSS, one for which there is no upfront cost, and a fixed monthly charge payable only from live operation. We want all for whom this service is appropriate to benefit from this solution. Hence, we looked to understand the level of understanding of the obligations for connecting to CSS and whether they have plans in place to meet them.

Of our respondents, the vast majority (84 percent) are familiar with the Ofgem obligations to connect the CSS. The majority (67 percent) have plans in place, and just 6 percent do not.

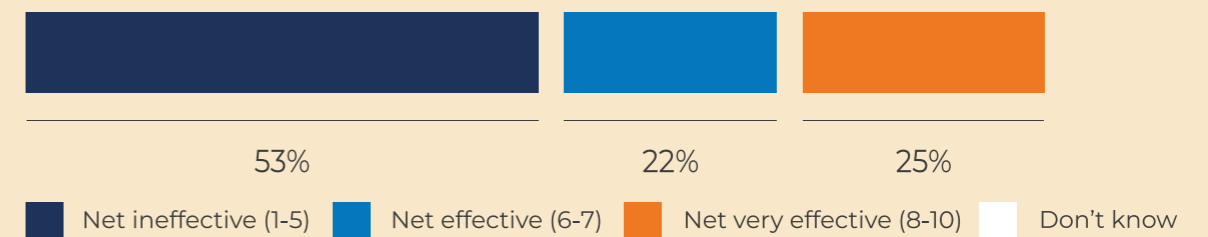
### The DTS User Group

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

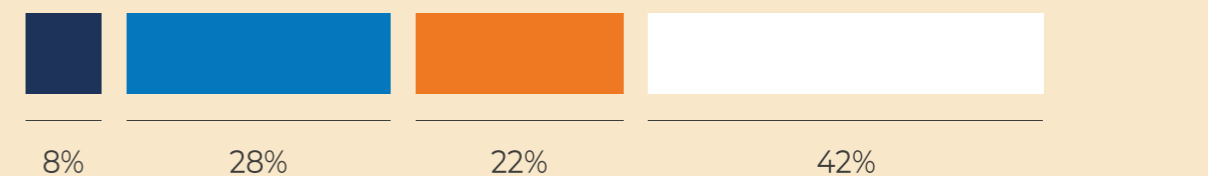
With the User Group's permission, we wanted to understand how well our customers understand the User Group, and identify any potential improvements we could make to how the User Group functions in delivering the needs of our customers.



#### Familiarity with the DTS User Group's aims and objectives



#### Familiarity with the DTS User Group's aims and objectives



While awareness of the User Group is high, understanding of its objectives has room for improvement. We plan to work with the User Group in 2021 to understand how we can make it an even more effective tool going forward.

# MOVING FORWARD

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**1** There has been a drop in satisfaction in the administration of change requests

**ACTION**

We will investigate the cause of this through our new account management approach that we are introducing in 2021. This will be part of a broader review of all DTS policies and processes.

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**2** There is still scope to improve our DTS broadcast emails

**ACTION**

We will explore ways to make these emails more targeted and will overhaul our approach to reporting, ensuring it is focused on the information our customers want.

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**3** Not all customers are taking advantage of the full spectrum of DTS products and services

**ACTION**

We will engage with our customers to ensure they understand the full range of available services and work with them to understand what meets their needs.

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**4** The User Group is a vital aspect of the DTS service, but more could be done to maximise on the value it brings

**ACTION**

We will be working with the DTS User Group throughout 2021 to improve the understanding of their role with the broader DTS community and exploring ways that the User Group can support innovation on the DTS.

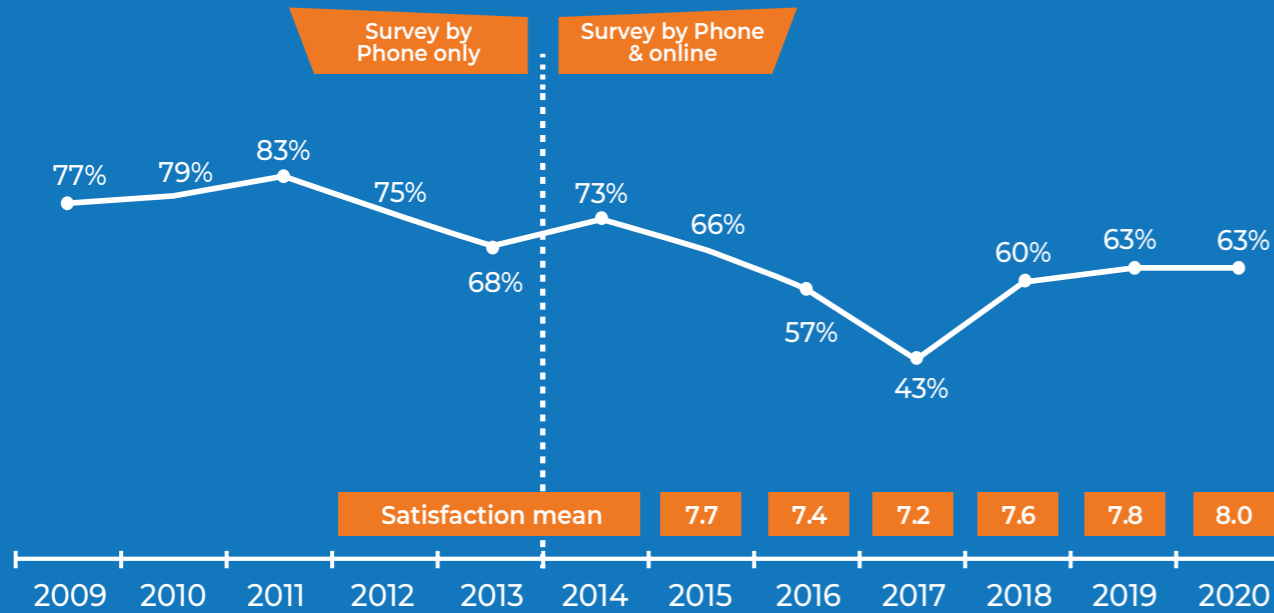
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# GOVERNANCE SERVICE CUSTOMER RESEARCH

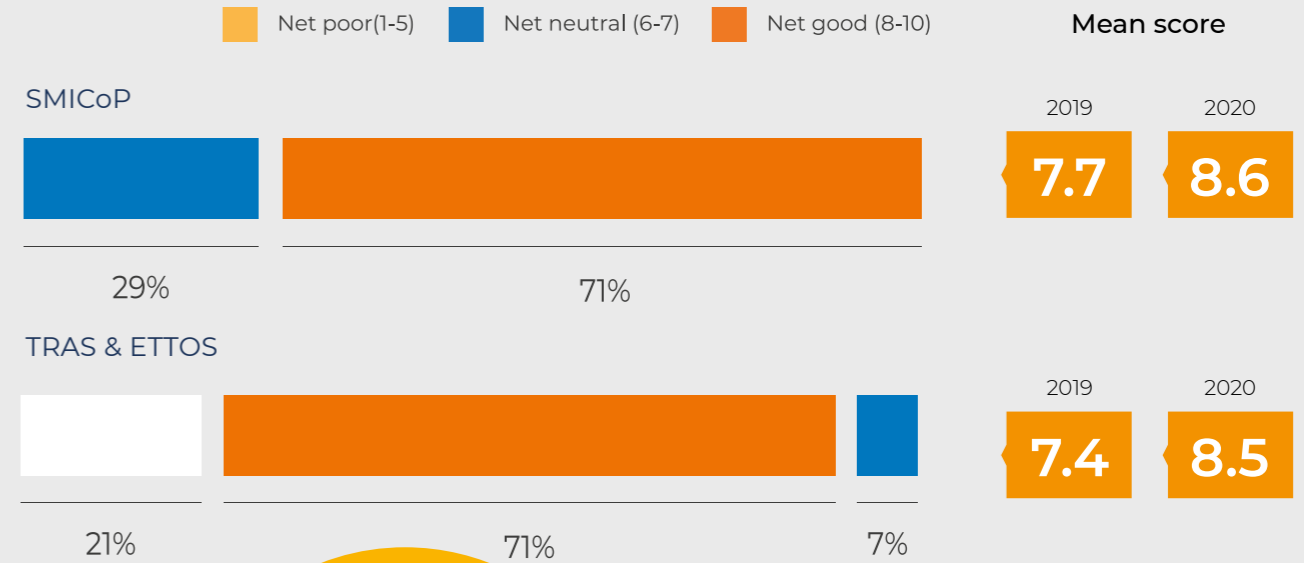
2020 has been a challenging year, with everyone needing to adapt quickly in a situation where so much is unknown. We were really pleased to see that, despite all this upheaval, the overall mean satisfaction score for ElectraLink's Governance Services is the highest it has been in five-years (8.0). Also, the percentage of customers scoring us between 8 and 10 has maintained at the 5 year-high of 63 percent. From the feedback we have received, these pleasing results are driven by our staff's expertise and understanding and our ability to respond to customers and resolve issues.

Highest overall satisfaction in five years.



## Performance of key industry codes

SMICoP, TRAS and ETTOS not only represent our best performing codes but are also the codes where satisfaction has increased most substantially since last year.

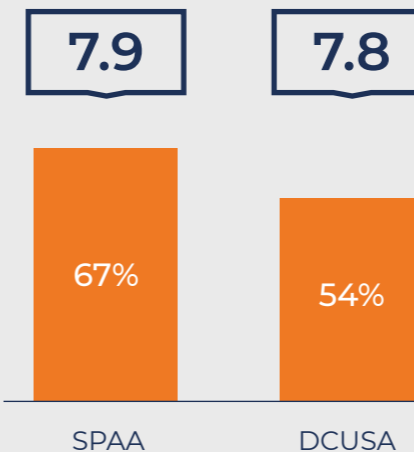


**SPAA**  
"I am happy with how they manage the processes they administer. Communications are generally clear and concise, and I can usually find what I need on the website."

**SMICoP**  
"They are very approachable. I find the people that I deal with are helpful when resolving queries or issues. They don't assume you know everything and they tailor their approach to my knowledge... Their meetings are run very well."

**TRAS & ETTOS**  
"All the TIC meetings have been handled very well especially given the impacts of Covid and having to switch to a fully remote version at short notice. Staff from a TRAS perspective are very informative and will try to answer questions in a timely manner. The meeting packs are prepared with plenty of notice to allow sufficient time to digest and understand the topics of discussion to allow the most feedback to be provided."

**DCUSA**  
"The ElectraLink contacts that I deal with are very responsive and professional. In recent months there has been a change in the staff involved in the subgroup I'm involved in and there has been a marked improvement in the service from what it was before."



SPAA and DCUSA also performed well, though this year's scores did see a slight decrease from previous years. Despite the drop in these score being minimal, we are committed to continual improvement so we have reviewed the detailed feedback and will take action to ensure our service to our customers is the best it can be.



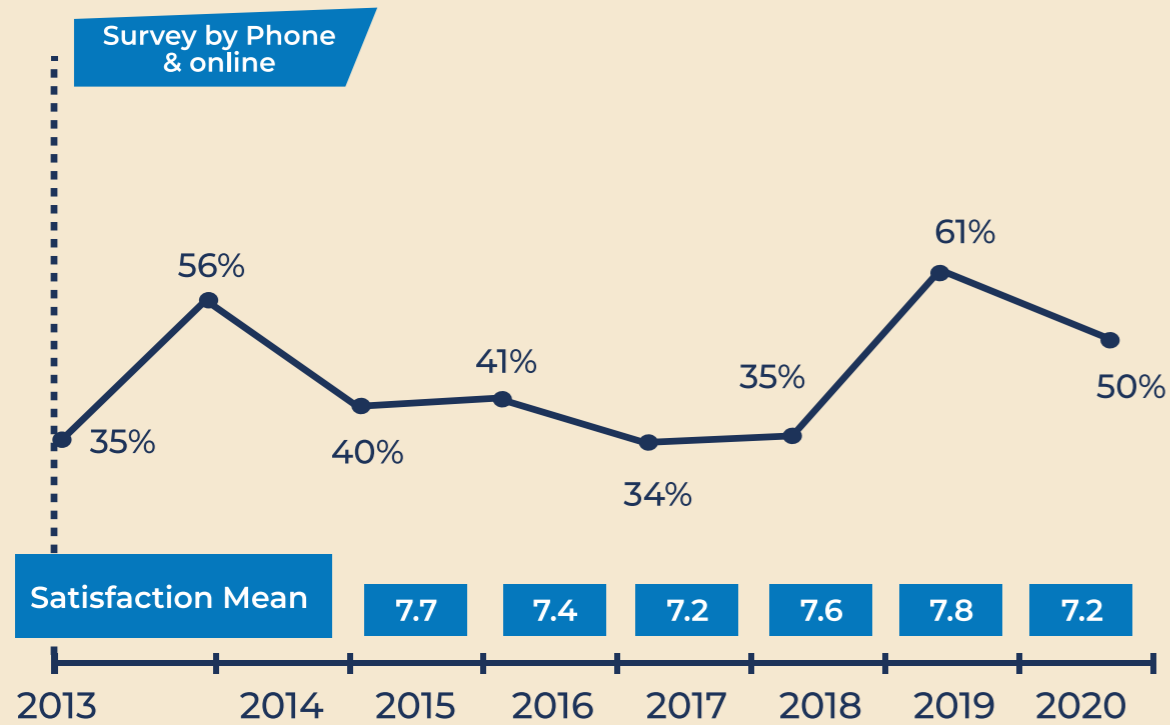
## Key performance measures

### Value for money

In 2020, we were happy to see that 100 percent of our respondents scored DCUSA between eight and ten for value for money. However, overall, the results for our value for money have shown that there is a slight decrease in the perceived value for money for our codes. At ElectraLink, we are passionate about offering services that are value for money. For that reason, we have worked hard to ensure that our codes have some of the lowest delivery costs in the market, while delivering some of the highest level of change and maintaining the excellent levels of customer service our customers have come to expect.

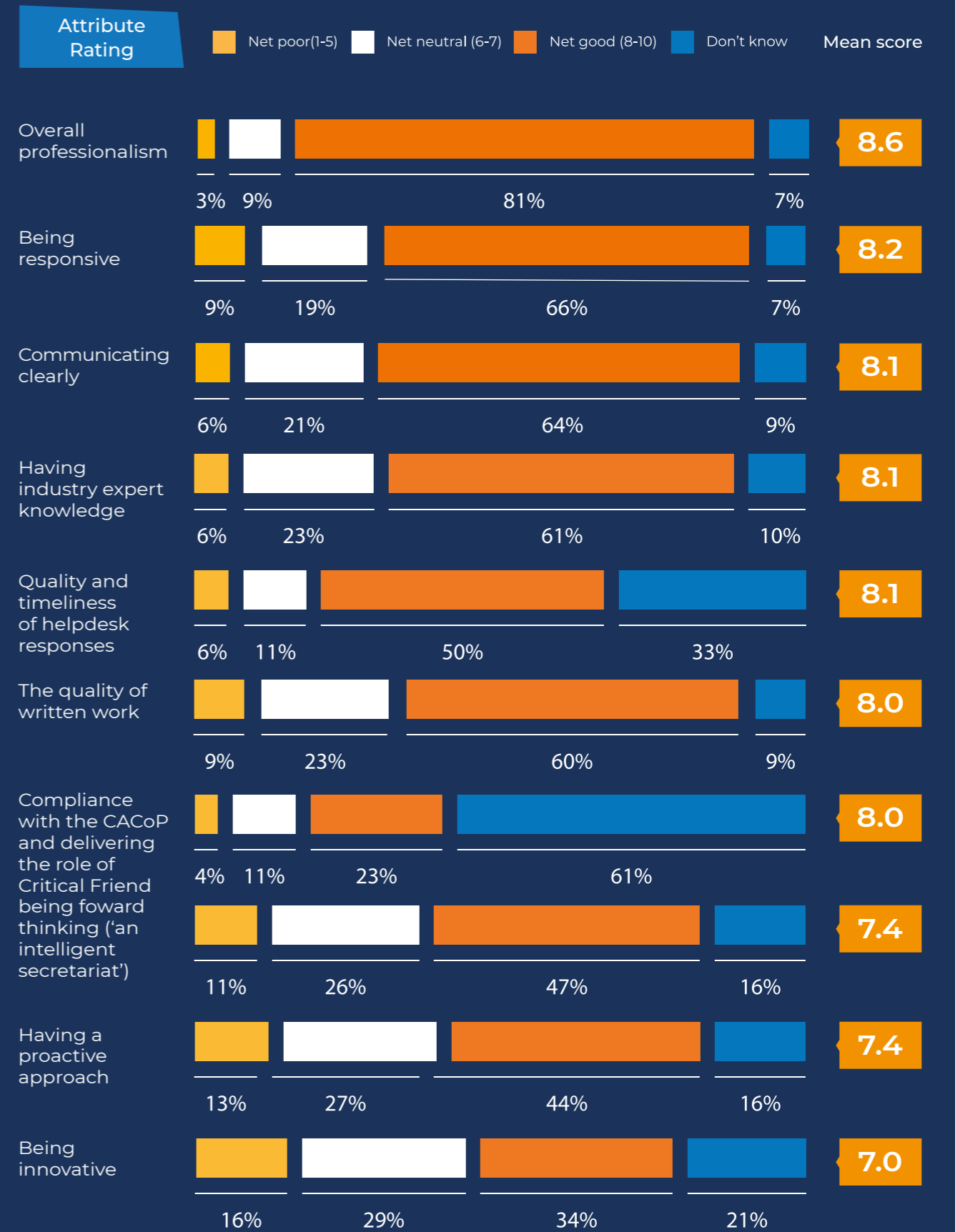
"...we have always come away with the feeling that the way they do things is economical and is great value for money."

### Value for money



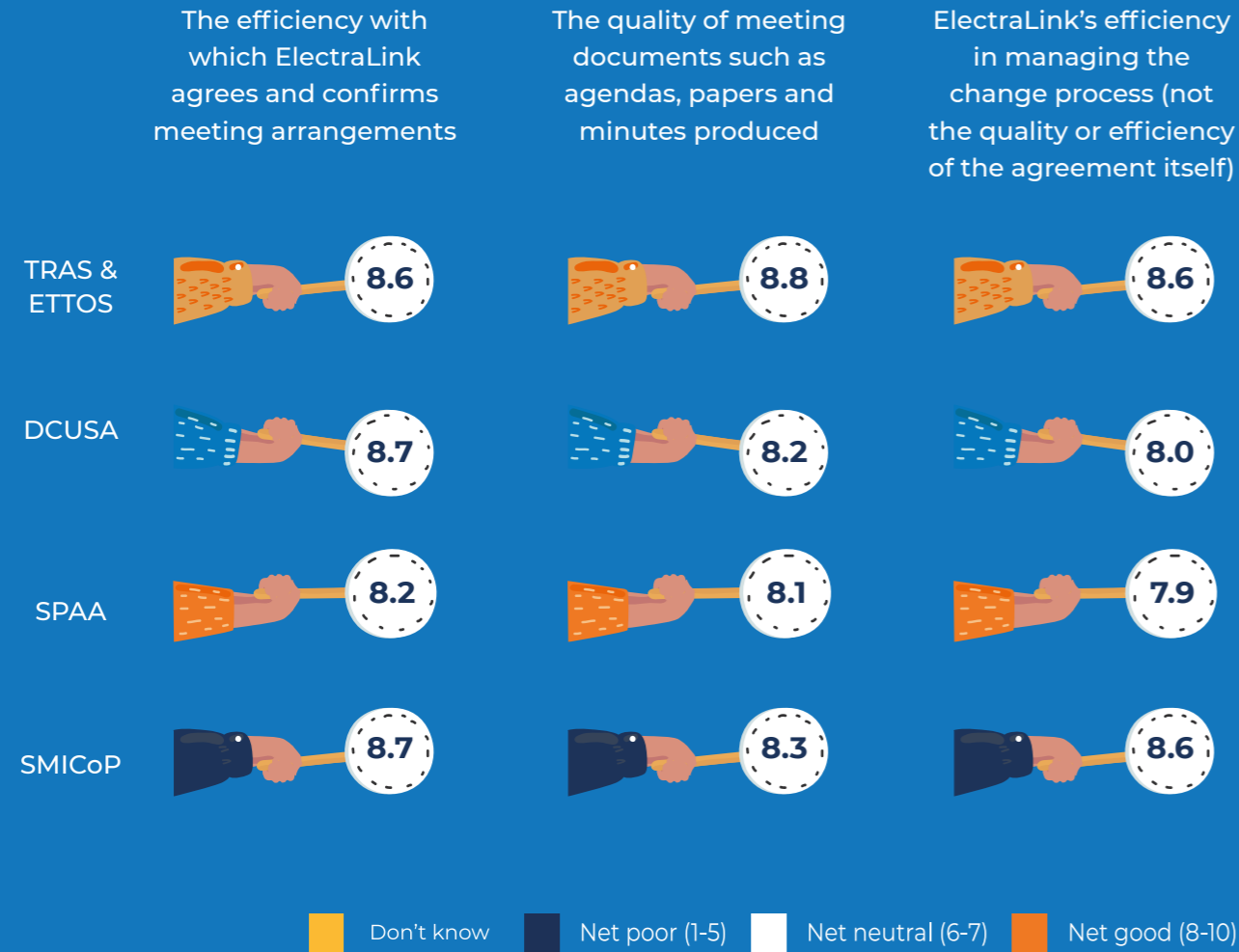
**100%** of respondents scored DCUSA a net good score of 8-10 for value for money.

Our attribute ratings allow us to understand how we are performing against key qualities that our customers have identified as being important to them. Overall, our performance remains strong across all these attributes but we will continue to work on those areas where our scores are lower, including being more proactive and innovative.



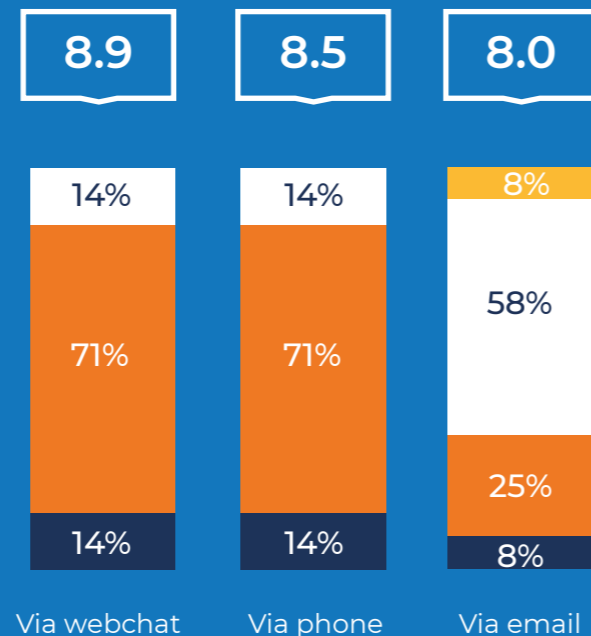
## Code management by code

These scores allow us to understand how well we are delivering some of the key code-based activity on a code-by-code basis. All except one received a net good score (8-10) with the one remaining score achieving a 7.9.



### Helpdesk channels

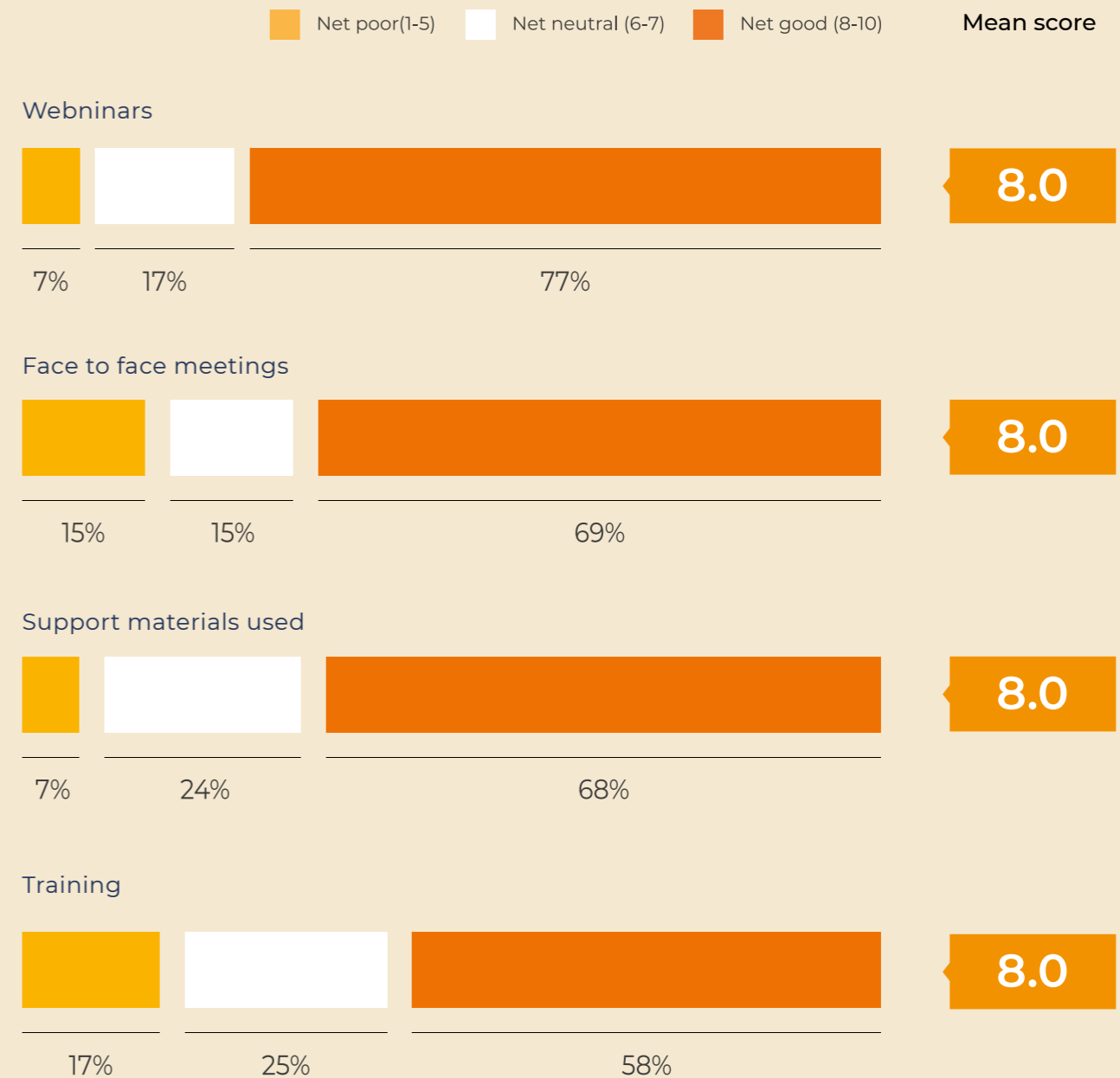
We also wanted to understand how satisfied our customers felt with the various helpdesk options we offer. The results have shown an improvement across the board, with the greatest improvement being for those who use email to engage with our helpdesk. This was a particularly significant improvement for us as, in our previous survey we received feedback that we needed to be quicker to respond to enquiries. We acted upon this feedback so were pleased to see that this has led to better results.



## Customer engagement & communications

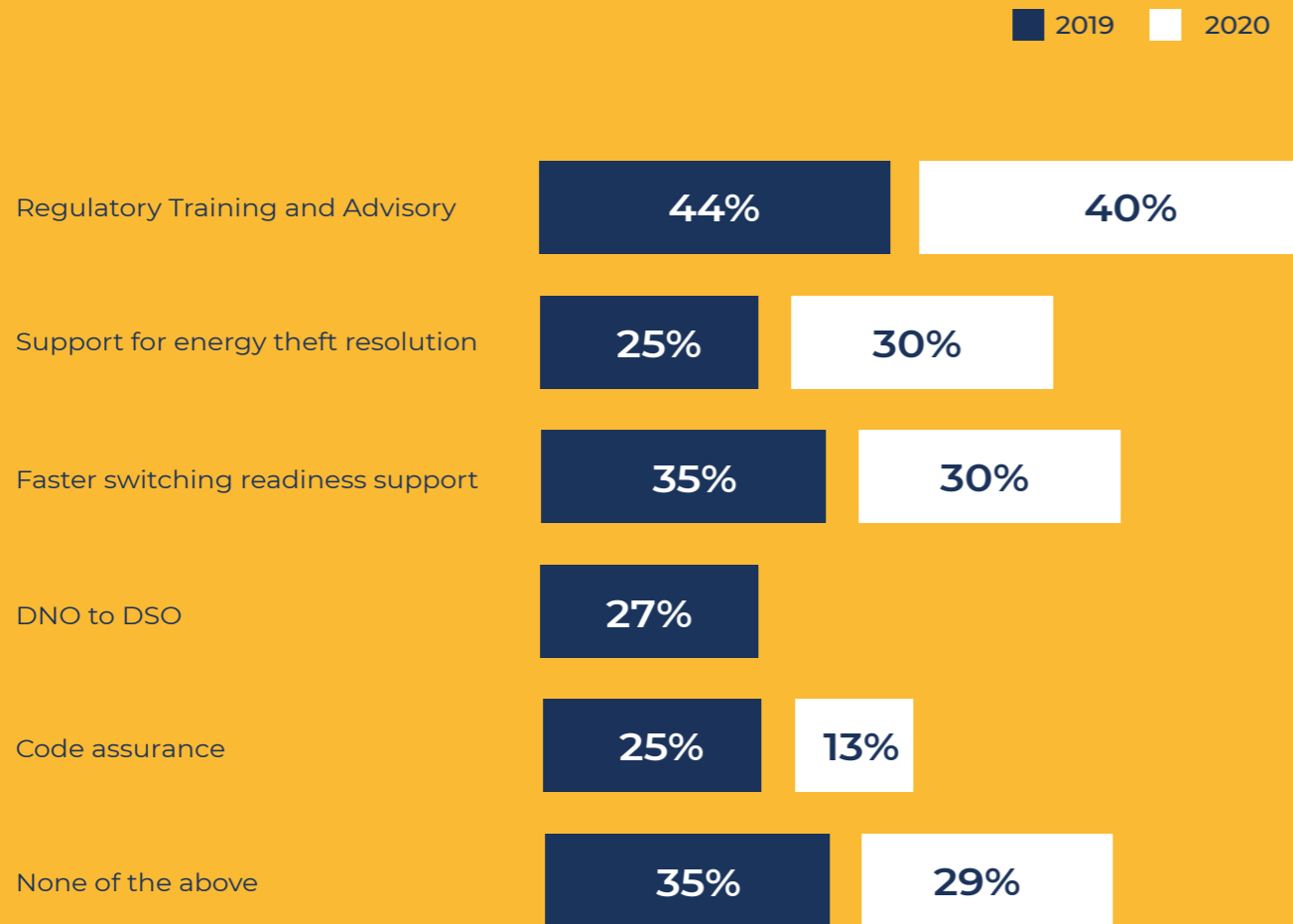
2020 has shown companies the importance of good engagement and communication and is an aspect of ElectraLink's service that we are continually looking to improve. We believe this commitment is what has resulted in mean scores of eight across all communication and engagement channels.

In addition, the impact of COVID-19 has meant face-to-face engagement has been impossible for most parts of the year. For that reason, webinars became a vital engagement tool for us in 2020, which is reflected in our satisfaction score, with webinars showing the greatest score increase (8.0 compared to 7.6 in 2019) of all our engagement channels.



## Interest in additional services

Of ElectraLink's additional services, support for theft resolution is an area of growing interest for our customers.

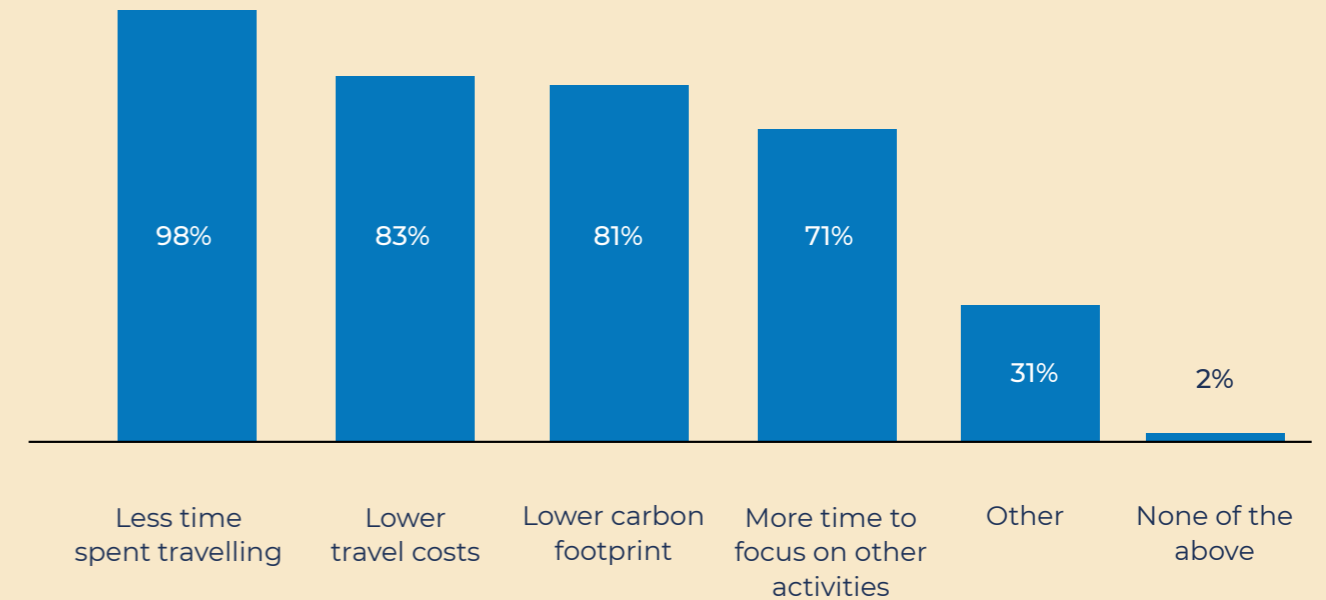


In addition to these quantitative results, we also undertook some qualitative interviews to unpack what future challenges ElectraLink could potentially support going forward. The key themes that came out of that research were flexibility, offsetting and alternative fuel sources, such as hydrogen.

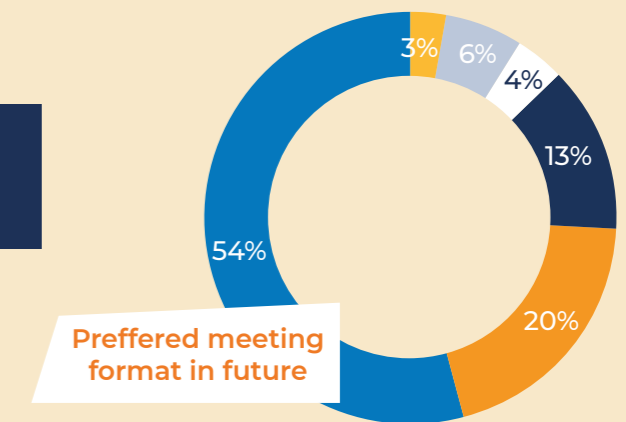
## The impact of Covid-19 on working practices

While 2020 has presented significant challenges to the energy industry and beyond, it has also provided an opportunity to reflect on our current working practices to ensure that we take advantage of what the pandemic has taught us and that ways of working reflect the needs of the transforming energy market and its participants. For that reason, we were keen to understand from our customers and stakeholders how they would like to see the learning from 2020 translated into new working practices once the pandemic is over.

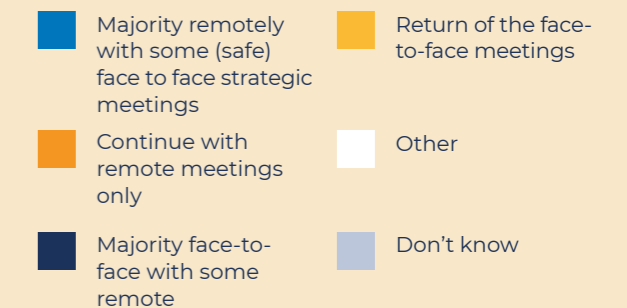
One of the key changes to the delivery of our services in 2020 was the move to remote meetings, so we wanted to understand how this change impacted on our customers.



**69%** have experienced benefits from EL's meetings being held remotely



With this in mind, we also wanted to understand how our customers and stakeholders wanted to conduct meetings in the future. 74 percent of our respondents wished to remain entirely remote or mostly remote with a few face to face meetings for strategic discussions, with only three percent wishing to return to the previous model where most meetings were held face to face.



# MOVING FORWARD

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**1** Only three percent of our respondents wish to return to the previous ways of working where most meetings were held face to face.

**ACTION**

We will work with our customers to agree on what the new normal looks like. We will also look at how we can continue to integrate technology to improve customer experience in the new normal.

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**2** Our respondents felt that flexibility, offsetting and alternative fuel sources represent key future challenges in the energy industry that ElectraLink could support.

**ACTION**

We will continue to increase our engagement with the industry to better understand the role ElectraLink could play in addressing these challenges.

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**3** There has been a drop in the perceived value for money for our codes.

**ACTION**

We will continue to work with our customers to ensure that all of 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.

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**4** Our respondents identified support during the REC transition as a service they would like ElectraLink to provide.

**ACTION**

We will 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 (based on the latest best estimate for go live).

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If you would like any further information regarding this report please contact one of the project team:

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