Allto Consulting

Wholesale Survey 2018

Market research results

NWG living water

J2978

11 December 2018

[redacted]

Contents

Introduction

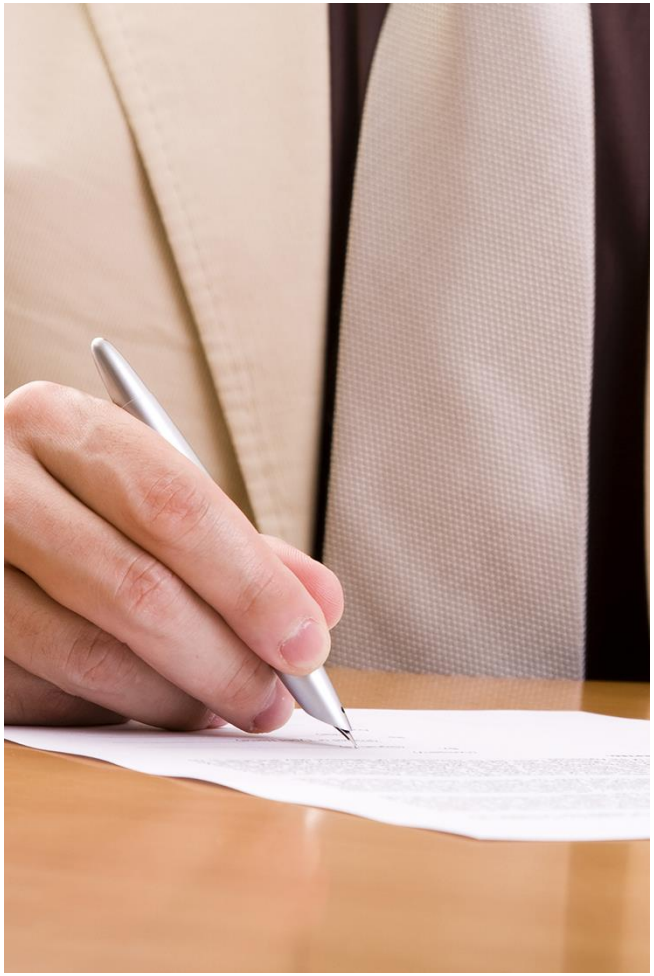
Background and business objectives

All non-household customers in England and Wales have been able to choose their water and wastewater service supplier since April 2017, when the water industry was fully opened up to competition for businesses – previously only large organisations using the highest volume of water could choose their supplier.

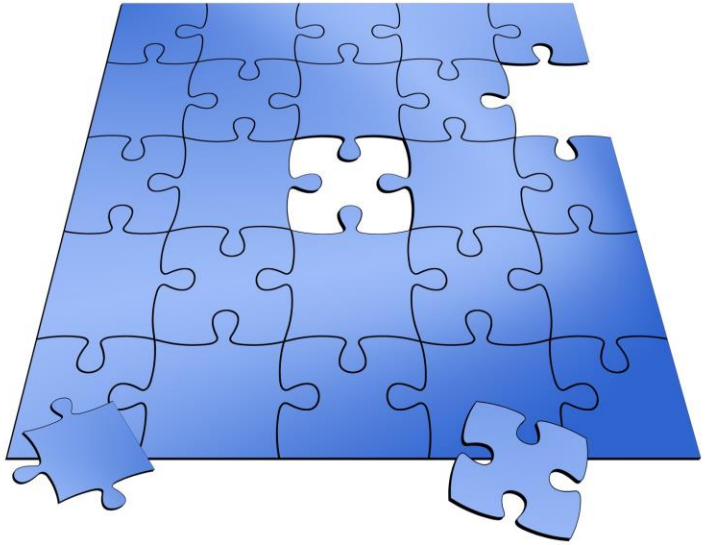
Northumbrian Water and Essex & Suffolk Water are still responsible for the water supply in the North East and in parts of Essex and Suffolk, and the wastewater/sewerage service in the North East, while a customer's chosen retailer is responsible for non-household billing and customer services.

The wholesale arm of NWL wish to track non-household customer satisfaction with the areas for which they are responsible now the market has been opened up to competition, and to track perceptions of NWL's brand values.

The first wave of this survey, carried out in autumn 2017, set a benchmark against which progress can be tracked in future. This second wave used largely the same questionnaire, and exactly the same sampling process, so that results can be directly compared.



The research objectives



Specific objectives for this research are to investigate:

- Awareness and understanding among businesses in the NWL regions, of the changes that have taken place in the market
- Satisfaction with the service provided by their wholesaler (regardless of who their retailer is)
- Identification of any aspects of the service felt to need improvement
- Where they have contacted NWL as their wholesaler recently, what happened and how satisfied they were with the service received
- Perceived performance against softer relationship/ reputation factors and corporate brand values (trust, expertise, ethics etc)

And, any suggestions for ways in which Northumbrian Water/Essex & Suffolk Water can improve, as the wholesaler for non-household customers in these regions.

Approach

A total of 500 phone interviews have been carried out, spread across the sub-regions as follows:

Location	Interviews
North	300
Essex	150
Suffolk	50
TOTAL	**500**

Given that the wholesale arm of NWL no longer has any direct non-household customer relationships, sample for the survey was sourced independently. We used Experian's business database and selected records on the basis of having their head office (or only premises, in the case of single site enterprises) within the postcode sectors served by NWL.

We avoided sole traders and boosted the coverage of larger organisations and heavy industrial businesses where water usage is likely to be highest and/or integral to business operations.

In the 2017 survey, our target respondent within each organisation initially was the person most responsible for managing the company's dealings with their water company. This caused some issues with organisations renting their property, as these would often say the building owner looks after dealing with utilities suppliers - given that we were not concerned to understand experience of billing and customer service, in these cases we would ask for the best person to talk to about the quality of the water supply (and sewerage service for the North) at these premises. This year, we have targeted this best person to speak to about the water and sewerage service, from the start. Respondent job roles are detailed on page 14 of this report.

Fieldwork was conducted between 30 October and 22 November 2018. The mean average interview length was 11 minutes, and the response rate (interviews as a proportion of interviews plus refusals) was 29%.

Headlines and learnings

Headlines (1)

- Just over half of customers this year (53%) say they are aware that they can now choose their water and wastewater supplier. This is lower than the 63% seen last year, which may indicate that awareness-raising activity going on in 2017 as the new structures were coming into play has now tailed off, and the topic has fallen off the radar for many businesses
- It is still the case, then (and possibly even more so), that there are implications for NWL in terms of communicating performance against their wholesale service – many non-household organisations simply don't 'get' who is now responsible for what
- Overall satisfaction with Northumbrian Water/Essex & Suffolk Water as the wholesaler, however, is positive, with 52% giving a 9-10 out of 10 (up from 46% in 2017) whilst just 6% give 0-4 (similar to last year's 5%); the 'NPS equivalent' for overall satisfaction (9-10s minus 0-6s) is 35.3, vs 28.7 in 2017
- 2% say their overall satisfaction has increased over the last year (the same as we saw in 2017), often explaining that this is because a problem or issue was handled particularly well. 3% say it has decreased (vs 4% last year), with supply interruptions and the way repair works have been handled the main areas of concern; others referred here to billing issues, though, with some of these mentioning that billing problems have arisen as a consequence of the changeover to the new retailer
- 74% rated water supply reliability as 9-10 out of 10, with very few giving low scores on this point (albeit lower in ESW than NW). Clean and clear drinking water and sufficiency of water pressure also scored well, with 62% and 59% respectively giving these a 9-10 and just 4% and 3% giving 0-4s – although ESW still scored significantly lower than NW on these two measures. While 52% gave a 9-10 for taste and odour, the proportion of low scores of 0-4 was again higher on this point, at 8%. In the North East, the effectiveness of the sewerage service was accorded 9-10s by 55%, while 5% gave a 0-4. As far as seawater and river water quality were concerned, quite high proportions (49% and 42% respectively) had no opinion, and many of those who did, gave a rating in the middle ground. On most of these measures, perceptions have improved compared to last year, particularly as regards the sewerage service, although taste and odour has dropped very slightly

Headlines (2)

- 22% of those in the North East say that the sewerage service needs improving. A fifth of all respondents want to see taste and odour improved (particularly in Suffolk); a little under a fifth would also like to see the quality of seawater and river water improved. Clean and clear drinking water and water pressure sufficiency should be improved according to 14% and 13% respectively, but nearly a quarter in ESW, and nearly a third in Suffolk would like to see water pressure improved. The proportions calling for improvement on each of these measures is very slightly lower this year than last
- Asked to what extent they feel they would know who to contact if they needed to get in touch with someone about anything to do with their water service, around a third indicated they would be quite confident about this, but a similar proportion clearly would not be. There has been no real movement on this compared to last year
- 13% of respondents say they have personally contacted Northumbrian Water/Essex & Suffolk Water as their wholesaler (vs 17% in 2017)
- Contact handling scores are reasonable, and somewhat higher than last year apart from ability to resolve issues and keeping the customer up to date. Asked specifically about any cases where they had contacted their wholesaler and been referred to their retailer instead, most of these 9 instances appear to have been handled appropriately, in the customer's eyes
- In terms of softer corporate brand values, non-household customers score the company positively on trust, ethical business practices, responsible site management and being organised/efficient. There is greater scope to improve perceptions of future planning, the contribution that the company makes to the local economy and getting things right first time. Improvement vs 2017 can be seen on all of these factors apart from helping to conserve nature and responsible site management, which have dropped slightly
- Asked what one thing they thought their wholesaler could do to improve, 47% had any suggestions to make. Drinking water quality was the top concern, followed by improving market communication (which also increased in prevalence this year compared to last), promoting exactly what it is that the wholesaler does and is responsible for

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Sample profile

Size classification

Employee size

As noted above, the sample was deliberately skewed towards larger organisations. The final employee size band profile achieved was as follows:

	TOTAL	NW	ESW
Base: answer given	*(473)*	*(279)*	*(194)*
Up to 5	18%	19%	18%
6-10	31%	31%	30%
11-20	18%	15%	21%
21-50	13%	10%	16%
51-100	8%	10%	5%
101-200	5%	6%	4%
201-500	2%	3%	1%
Over 500	6%	6%	5%

Number of sites

Asked how many sites their organisation operates out of, respondents answered as shown in the table below. Around a third are multi-site operations.

	TOTAL	NW	ESW
Base: answer given	*(474)*	*(279)*	*(195)*
One	68%	65%	72%
2 – 3	14%	14%	13%
4 – 5	3%	3%	2%
6 – 10	3%	4%	2%
11 – 20	2%	3%	2%
21 – 50	4%	5%	4%
Over 50	6%	7%	6%

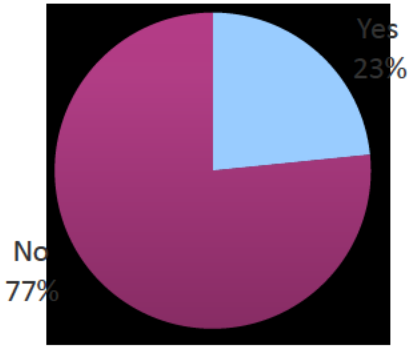
Sector classification

By SIC (2007) division, the sample achieved broke down as follows:

	TOTAL	NW	ESW
Base: all respondents	*(500)*	*(300)*	*(200)*
Agriculture, forestry and fishing	2%	2%	4%
Manufacturing	10%	9%	12%
Utilities and waste management	3%	2%	4%
Construction	9%	8%	10%
Wholesale and retail trade	8%	7%	9%
Transportation and storage	3%	5%	1%
Accommodation and food service	10%	11%	8%
Information and communication	3%	2%	3%
Financial and insurance	4%	3%	5%
Real estate	5%	4%	6%
Professional, scientific and technical	11%	11%	12%
Public administration	2%	2%	1%
Education	1%	1%	2%
Human health and social work	14%	16%	11%
Other service activities	16%	17%	15%

Use of water

Respondents were asked whether the business uses water for anything other than typical domestic-type uses, such as washing hands, toilets, employee drinks etc:



Base: all respondents (500)

Likelihood of using water for other purposes was highest in production sectors (36%) and increased with company size, with 32% of those employing more than 50 people needing to make use of water in their daily business.

Common uses of water include cooking and washing up in food service, cleaning, laundry and showers/baths in hospitality and residential care, in the manufacturing process and watering land.

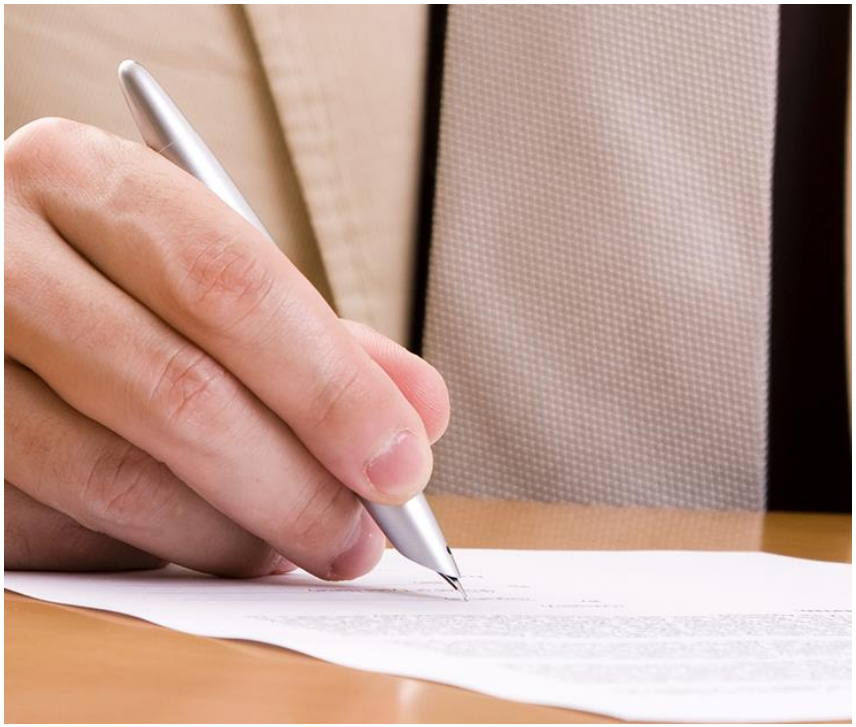
Q17a/b

Respondent job role

Respondent job roles split out as follows:

	TOTAL
Base: all respondents	*(500)*
Admin	26%
Director/Partner	13%
General Manager	13%
Owner/Chairman/MD	9%
Accounts/Finance	8%
Facilities/Maintenance	5%
Sales/Commercial	3%
Operations	3%
Others	20%

In the smaller organisations, we were more likely to be talking to the owner or a senior business leader; admin and accounts functions were more common in the medium sized companies and facilities/maintenance or other specific functional managers in the largest ones.



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Awareness and understanding of the market changes

Awareness

Respondents were asked whether they are aware that as a non-household water industry customer, they are now able to choose which company they buy their water and wastewater services from:

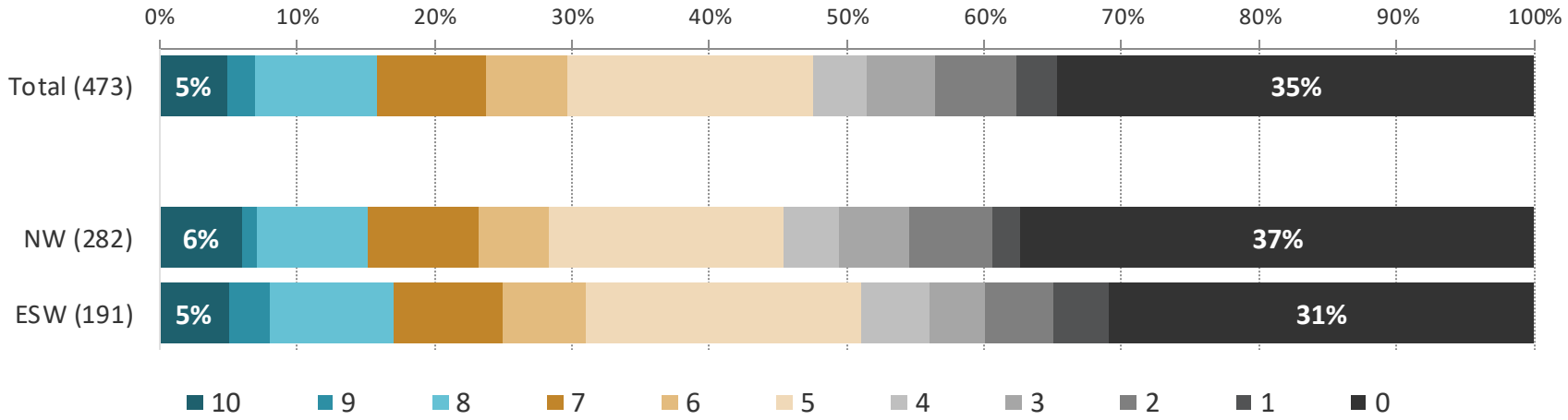
Base: all respondents (as shown)

This result is lower than that seen last year, when 63% said they were aware. The level of awareness of competition this year is significantly higher in organisations with up to 50 employees (56%) and reduces as organisation size increases (49% aware in organisations with 51-200 employees and 36% in 201+). As was the case last year, there were no significant differences by region or sector. There was also no significant difference according to whether or not water is used for business purposes other than the usual domestic-type ones.

By job function, though, it is again apparent that people working in accounts and finance roles are more aware of what has happened (66%), while this is much lower among general managers and people with facilities and maintenance responsibilities (42-44%).

Understanding

Respondents were then asked to indicate how well informed they feel about the way businesses can now buy their water and sewerage services – using a scale from 10-0 where 10 means very well informed and 0 means not at all:



Base: all respondents, where answer given (as shown)

Only 16% (down from 23% last year) gave a score of 8-10, which we might take to mean they feel pretty well informed. Over half (53%) gave a low score of 0-4 (48% last year), and a over a third gave the lowest possible score of 0.

Even among those who had earlier said that they knew non-household customers can now choose their retailer, 16% of these gave a score of 0-4 here. Overall, just 12% of all respondents said that they are aware they can choose supplier and feel well informed about the market now being opened up to competition (and this is even less than last year when the level stood at 20%) – leaving the great majority knowing little or nothing about the new regime).

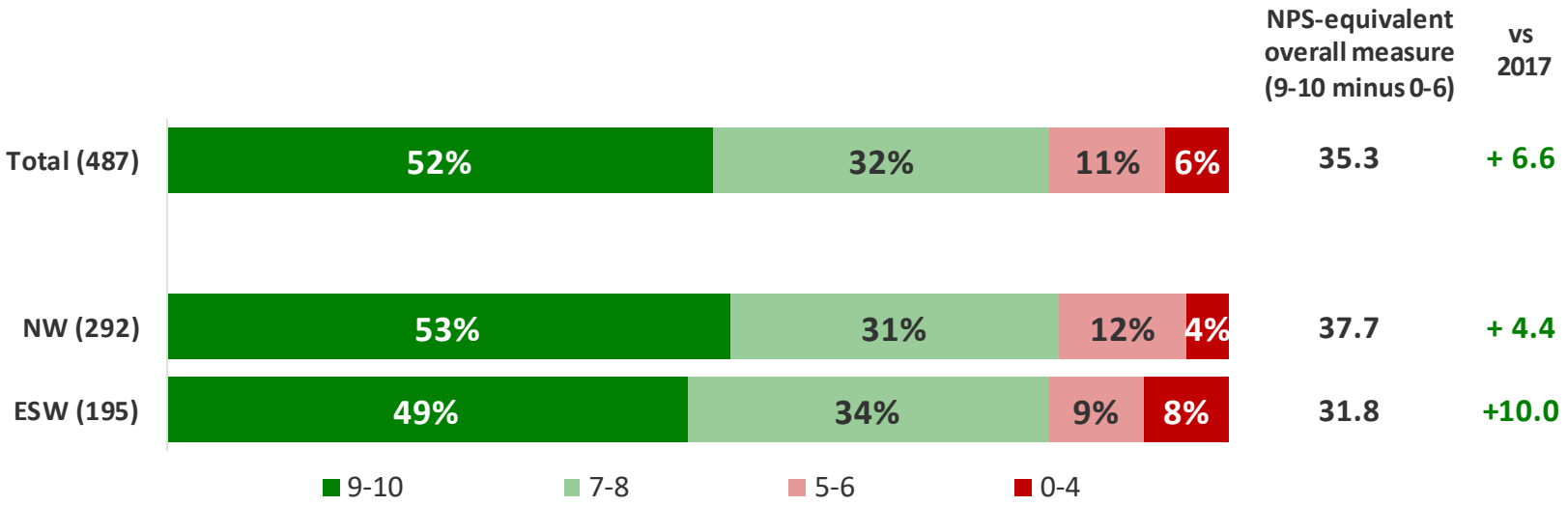
Understanding was particularly low in the largest organisations (over 200 employees), where half gave a score of 0 on this measure.

Q2

Service satisfaction

Overall satisfaction

Respondents were asked for a score from 10-0 to indicate how satisfied they are overall with the service provided by their wholesaler:



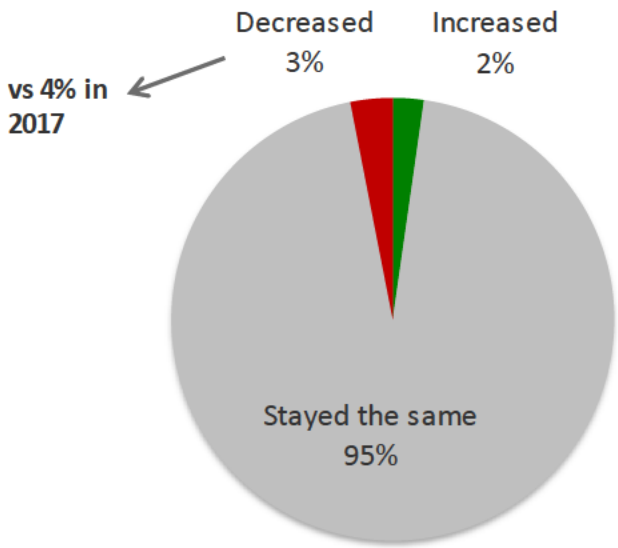
Base: all respondents, where answer given (as shown)

Scores were largely positive, across the board, and improved across both regions compared to last year.

As in 2017 there was a significant difference between those who feel well informed about the way the market now works, where the NPS-equivalent overall measure was as high as 67.6 compared to the rest, at 28.0. The only other significant difference between the other sample sub-groups was for those who use water for the usual domestic-type uses, where the NPS-equivalent overall measure was 39.1, versus 23.0 for those who use water for additional business purposes.

Change in satisfaction over the last year

The majority of businesses report that their level of overall satisfaction with their wholesaler has remained the same over the past year:



Base: all respondents, where answer given (488)

There were no significant differences across the sample sub-groups in the proportions saying their satisfaction has decreased.

Those in Suffolk were less likely than the rest to say their satisfaction has increased (0% vs 2% in the North and 3% in Essex), as were those who feel well informed about how the market now works (0% compared to the rest, at 3%). On the other hand, smaller organisations (with up to 10 employees) were more likely than larger ones (51-200 employees) to say their satisfaction has increased (3% vs 0%) as were those in the service sector (2%), than those in production (0%).

Q4a

Why satisfaction has increased

10 respondents said their satisfaction level with their wholesaler has increased over the last year. Asked why, two of these could not give any particular reason, but the comments made by several of the rest point to this being down to how well they felt the company has dealt with problems, the speed of their response, their good (customer) service, and making visits to the property.

They came out straight away to sort out a leak in the street [North]

When you need to talk to them they get back to you faster than they used to [North]

In the past we have had times when water has been switched off due to works, we had no warnings in the past, but this year has been different [North]

They came in around six weeks ago and actually did a survey and they went round the whole building, which we've never had done before, and they highlighted a few things and we're waiting for them to come back [North]

They are just a bit more hands on with helping out when we've had problems. They would come and sort it straight away [Essex]

Due to the recent visits we have had to look at leaks and water wastage [Essex]

Whenever we need help they are always available [Essex]

However, one respondent here commented on factors relating to costs – which may well indicate they are thinking about their retailer (and underline the confusion in the market over which company does what).

The price of the bills went down [North]

Q4b

Why satisfaction has decreased (1)

Where satisfaction has decreased, this can because of problems with supply interruptions, the time taken to resolve issues, disruptive works and staff attitude:

We've had issues with the water pressure - the water service - water had been cut off for water main upgrades [North]

I'm trying to get a service disconnected and it's taking months and months [North]

We had a burst water main last year some time, they had to back fill the pipes, but they didn't tell us and we had customers still using the water and it was dirty because it was going the wrong way [Suffolk]

Whilst we were having the supplies put in the staff at the call centre in Essex were confrontational and aggressive and inaccurately marked our land usage down which had a knock-on effect of increasing the cost of our new supplies [Suffolk]

It took a long time to find the leak. We have cows on the property and we can't get water to them easily [Essex]

Our drinking water has now got a funny taste [Essex]

They're digging up the road, it's a loss of business for us and it's the fourth time in the year that they've put traffic lights outside the pub [North]

They've been very unhelpful. We've had a lot of leaks, the man who came out was very grumpy, they knocked a wall down and they said they wouldn't fix it [Suffolk]

Why satisfaction has decreased (2)

Other comments explaining why their satisfaction has decreased related to costs and billing, one of which linked to the changeover to Wave, a lack of information and poor (customer) service:

We had 6 new supplies put in recently and the cost to put the new supplies in was much higher than other utilities [Suffolk]

Because I've not had any information at all recently, nothing [Essex]

It was around the invoicing that was messed up when it changed over to the new company [North]

They are not contactable. You can't phone them, as when you do you have to hang on for ages, then it goes through to an answerphone that then cuts you off. They don't respond to emails. It is a constant issue [Essex]

There are three water lines at these premises and they have not a clue which is which and we have been billed for the wrong water supply [North]

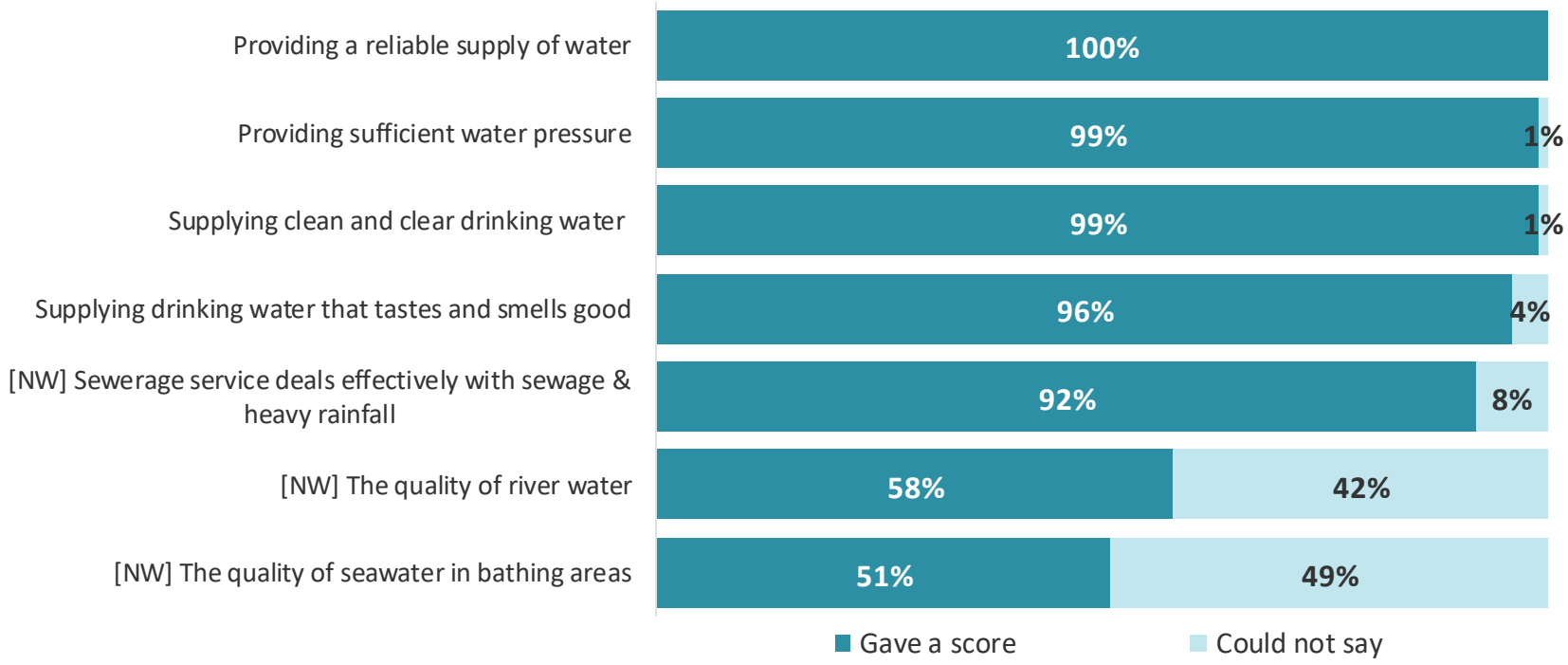
Essex and Suffolk Water are not regulated and we have not been able to make complaints and they have treated us pretty poorly [Essex]

It's not a very good service. I own flats and their service is poor [Suffolk]

Q4b

Key aspects of service - %'s able to judge

Respondents were read a list of key aspects of the service that their wholesaler is responsible for and were asked to rate the company on each of these. While all could comment on a reliable supply of water, and most gave scores on pressure, water quality and the sewerage service, significant numbers felt unable to judge on the quality of river and sea water:



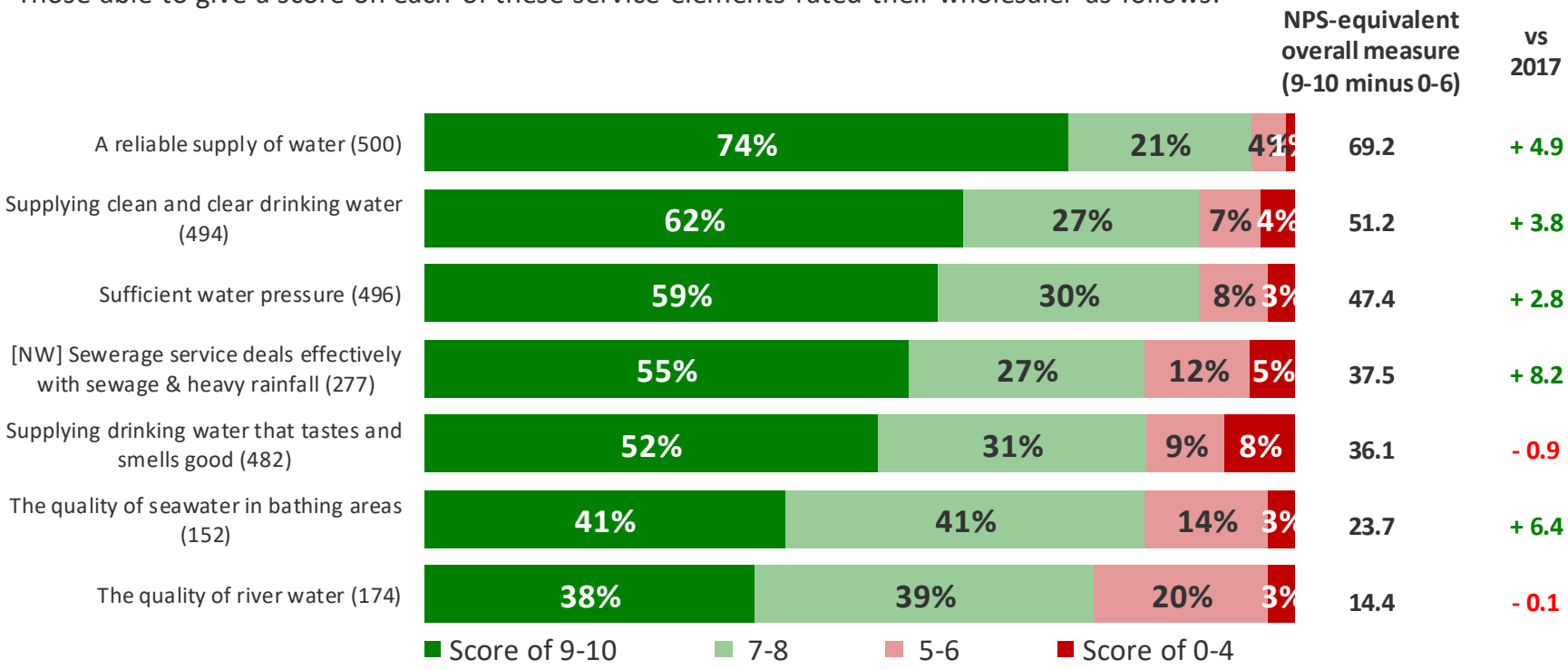
These levels are very similar to those seen last year.

Base: all respondents (500)

Q5

Key aspects of service

Those able to give a score on each of these service elements rated their wholesaler as follows:



Base: all respondents, where answer given (as shown)

There were few noticeable differences in the scores given, by company size or sector; and also no significant differences between those who only use water for domestic-type reasons and those more reliant on water for business purposes.

However, those most well informed about the recent market changes gave significantly higher ratings on all of these factors than at least some (if not all) of the rest. There were also differences by region, detailed on the next page.

Q5

Service scores by region

The NPS-equivalent measures for each region and sub-region were as shown in the table below; significant differences are highlighted in green (higher) and red (lower).

	TOTAL	NW	ESW	Essex	Suffolk
Reliable supply	69.2	74.0	62.0	62.7	60.0
Clean and clear drinking water	51.2	58.9	39.6	41.5	34.0
Sufficient pressure	47.4	56.6	33.7	38.3	20.0
Sewerage service	37.5	37.5	-	-	-
Taste and odour	36.1	42.0	27.0	28.9	21.3
Seawater in bathing areas	23.7	23.7	-	-	-
River water	14.4	14.4	-	-	-

Base: all respondents, where answer given

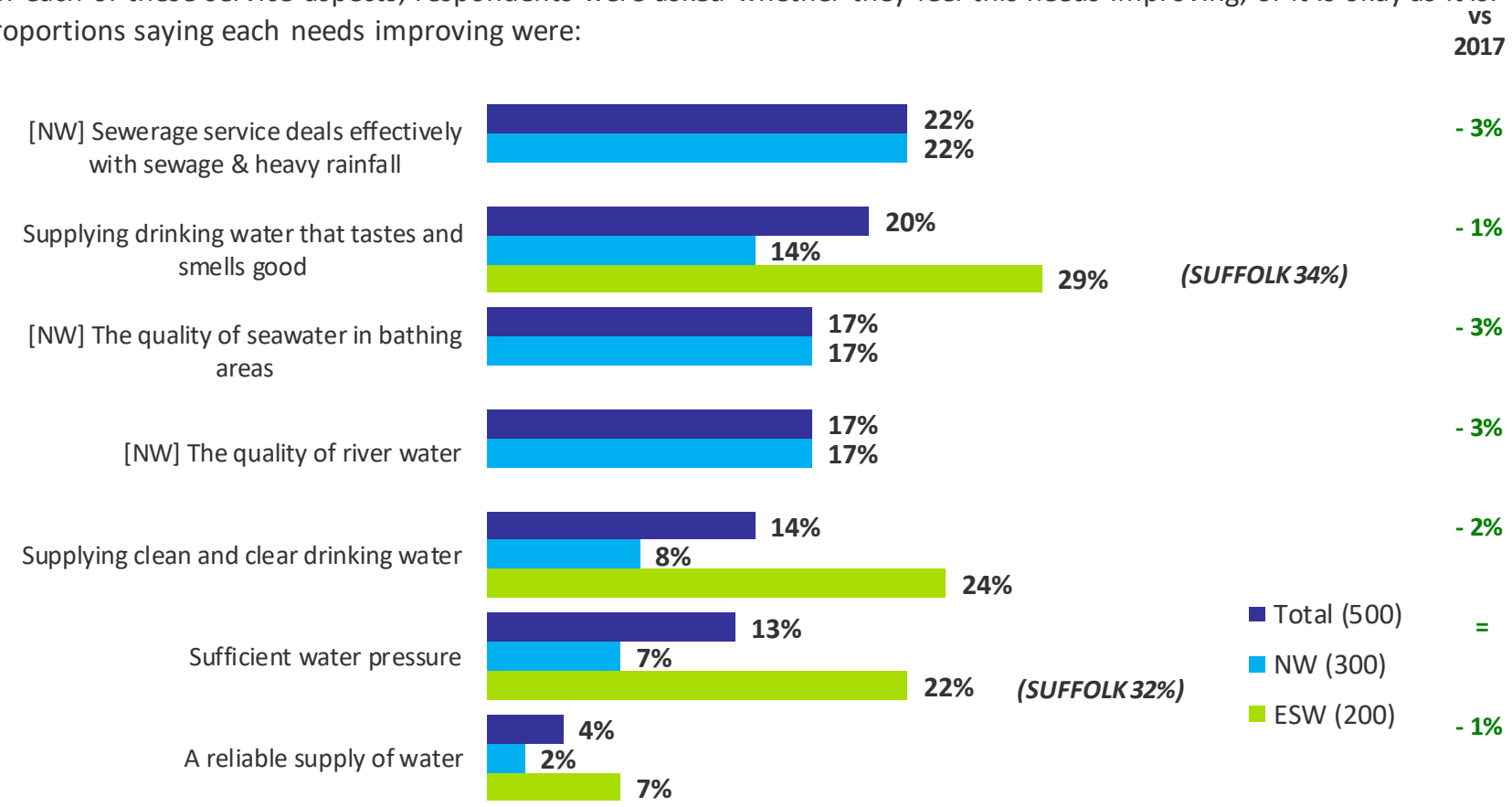
The analysis base for Suffolk is low, so these scores should be treated with some caution; nonetheless it will be of some concern that ratings here are still noticeably lower.

We have reviewed the incidence of low scores on these elements by postcode, in all of the regions. Bases are obviously extremely small, but while there are a range of isolated cases here, there were a number of instances of low satisfaction and/or higher likelihood of saying a service needs improving, in NE1, TS22 and IP14, which may warrant consideration.

Q5

What needs improving?

For each of these service aspects, respondents were asked whether they feel this needs improving, or it is okay as it is. Proportions saying each needs improving were:

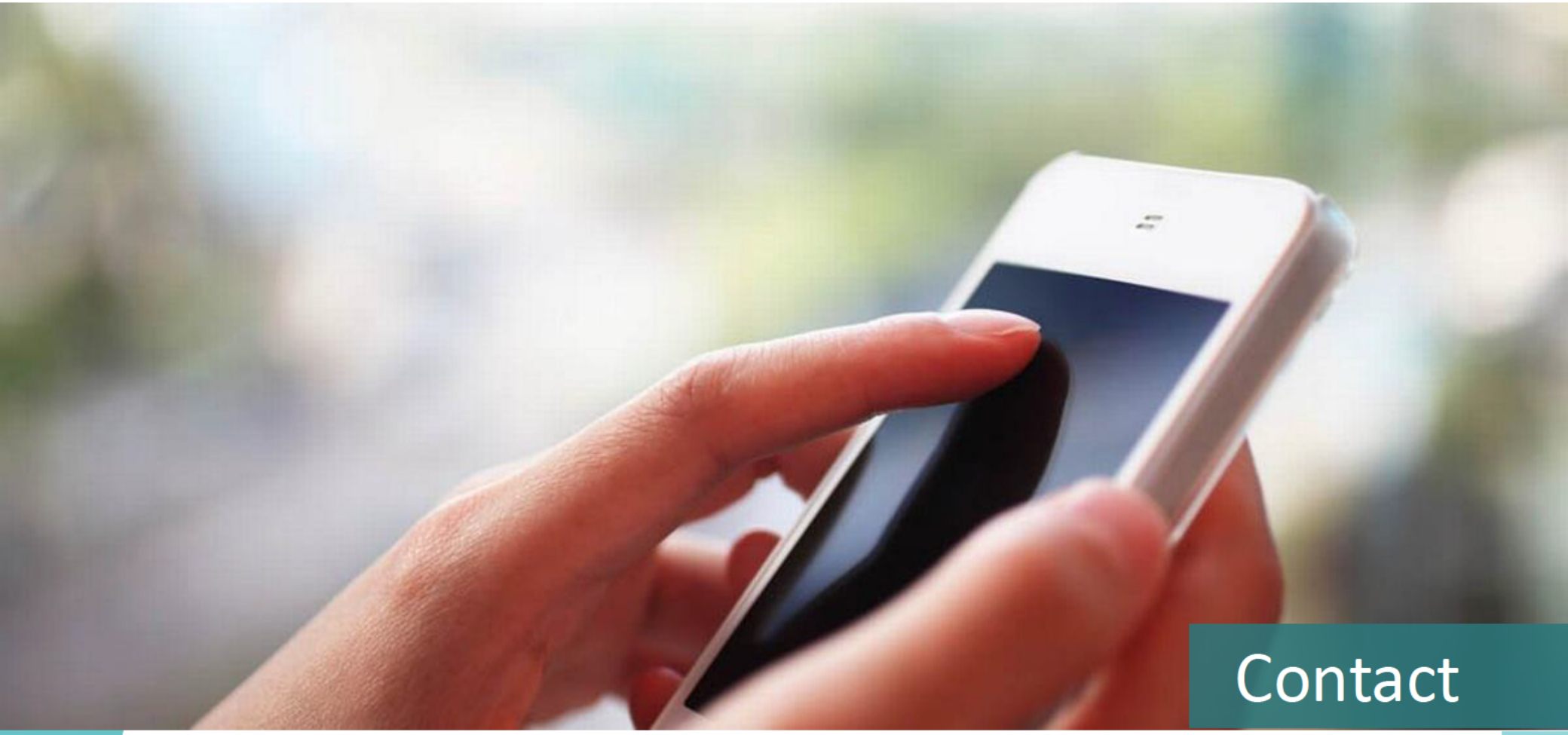


Base: all respondents (as shown)

Q6

Impact of improvement requests on overall satisfaction

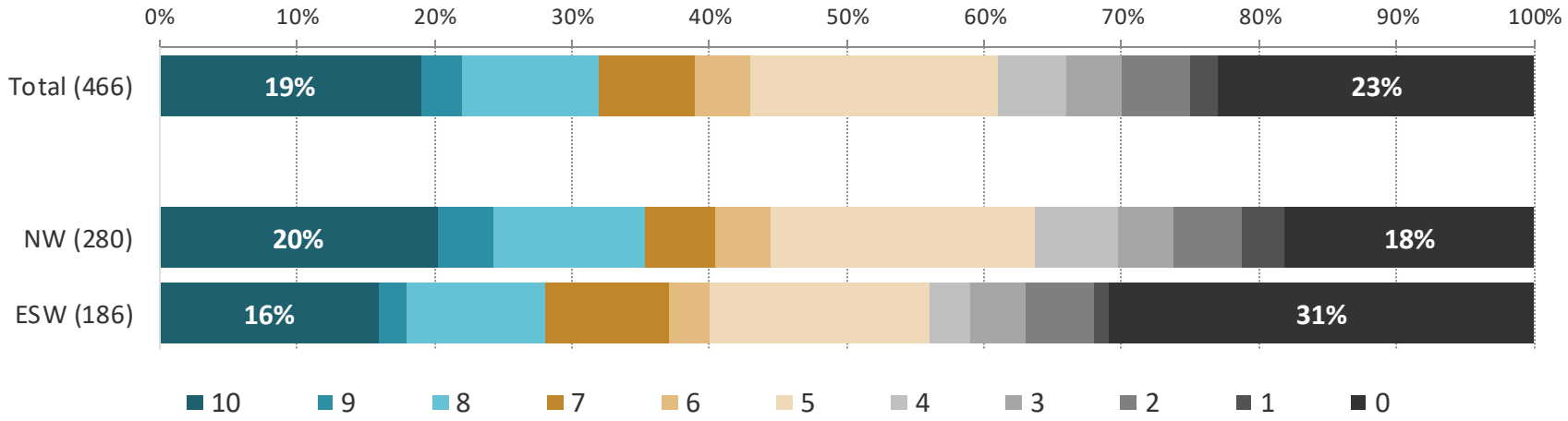
Among those respondents who say that none of these service areas needs improving, the NPS-equivalent overall satisfaction measure is 51.7 – compared to 35.3 across the sample as a whole. The overall satisfaction measure turns negative among those wishing to see improvement in clean and clear drinking water (-2.9) and water pressure sufficiency (-4.8). It reaches its lowest point (-19.0) among those respondents who want to see improvement in reliability of supply; as was the case last year, we can conclude that this is the service aspect with greatest impact on overall satisfaction, then.



Contact

Knowing who to contact for what

Respondents were asked to what extent they feel they would know when they should get in touch with their wholesaler and when their retailer, if they needed to contact someone about anything to do with an emergency to their water service – using the usual scale of 10-0 (where 10 means they are sure they would know):



Base: all respondents, where answer given (as shown)

Around a third (32%) gave a score of 8-10, indicating they are quite confident they would know who to contact. Slightly more, 39%, gave a low score of 0-4, though, and almost a quarter gave the lowest possible score of 0.

There is again some correlation between understanding of the new market structure and feeling they would know who to contact about what, but this is not perfect – even 29% of those well informed gave a low score here.

Q7

Handling of contact

Respondents were then asked if they have personally contacted Northumbrian Water/Essex & Suffolk Water, as their wholesaler:

Contacted	Total (500)	13%
	NW (300)	13%
	ESW (200)	13%

Base: all respondents (as shown)

(AWARE CAN CHANGE RETAILER 16%)

(Slightly lower than the 17% seen last year)

Those who said they had contacted the company were asked for scores out of 10 according to how far they were satisfied with a number of aspects about this contact:

	9-10	7-8	5-6	0-4	NPS-equivalent overall measure (9-10 minus 0-6)	vs 2017
They were easy to get in touch with (66)	52%	24%	11%	14%	27.3	+ 2.6
Staff were knowledgeable (60)	48%	23%	22%	7%	20.0	+ 1.4
Speed of response (65)	48%	22%	17%	14%	16.9	+ 5.0
They understood your needs as a customer (66)	45%	26%	9%	20%	16.7	+ 2.9
Ability to resolve issues (65)	43%	26%	15%	15%	12.3	- 1.8
Being kept up to date (63)	38%	21%	19%	22%	- 3.2	- 5.5

Base: all contacters, where answer given (as shown)

Q8-9

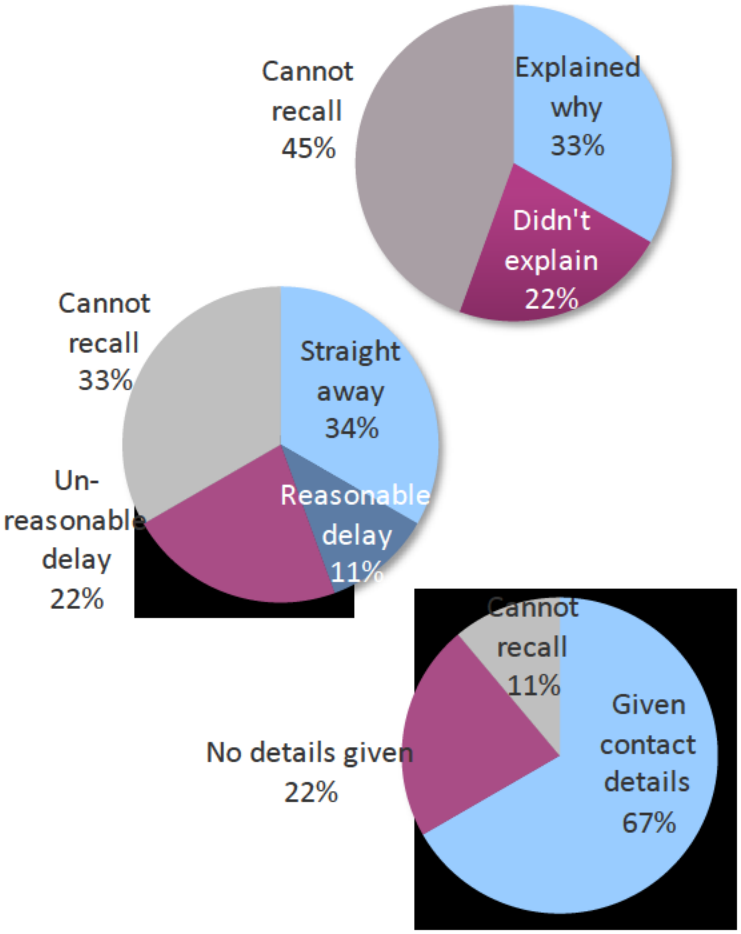
Referrals to retailer

Asked if there have been any times when they have contacted their wholesaler and been referred by them to their retailer instead, 2% of all respondents said this had happened (down from 4% in 2017) .

Of these 9 respondents, 3 said that their wholesaler had explained why the matter should be referred to the retailer, and 2 said they had not explained. The rest could not recall either way.

In 3 of these 9 cases, the wholesaler had said straight away that this was a matter for the retailer. In 3 cases there was some delay in coming to this conclusion (the other 3 couldn't remember if this had been immediate or not). 1 of the 3 where there had been any delay here felt the delay was reasonable; 2 did not.

Of these 9 cases, 6 said their wholesaler had given them the contact details they would need for their retailer; 2 said not, and 1 could not remember.



Base: contacted wholesaler, referred to retailer (9)

Q10-13

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Impressions of the brand

Brand values - %'s able to judge

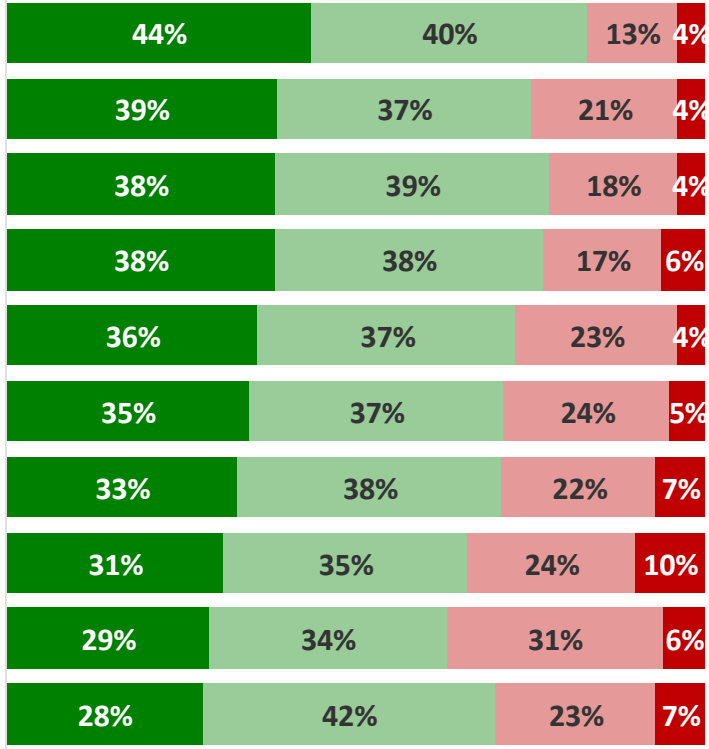
Respondents were read a list of specific brand values elements and asked to rate their wholesaler on each, based on their own experience and impressions of the company. There were significant numbers of respondents who felt unable to judge, on several of these (again, at similar levels to last year):

Base: all respondents (500)

Q14

Brand values – agreement levels

Scores given from 10-0 on each of these brand values elements were as shown below. Some statistically significant differences in the pattern of response to these factors can be seen - those most well informed about the market changes, and respondents in the North, gave consistently higher scores than the rest.



	9-10	7-8	5-6	0-4	NPS-equivalent overall measure (9-10 minus 0-6)	vs 2017
A company that I trust (469)	44%	40%	13%	4%	27.1	+ 8.9
Ethical in the way it does business (350)	39%	37%	21%	4%	14.0	+ 4.9
Manages its sites responsibly (373)	38%	39%	18%	4%	15.5	-0.7
Organised and efficient (424)	38%	38%	17%	6%	14.6	+ 4.6
Experts in engineering and technology (335)	36%	37%	23%	4%	9.9	+ 1.3
Helps to conserve nature (326)	35%	37%	24%	5%	5.8	-2.5
Considerate of the community, in the way it carries out work (412)	33%	38%	22%	7%	3.4	+ 2.2
Gets things right first time (377)	31%	35%	24%	10%	-2.7	+ 0.7
Makes a significant contribution to the local economy (317)	29%	34%	31%	6%	-7.9	+ 3.4
Forward-looking and plans for the future (340)	28%	42%	23%	7%	-1.8	+ 1.7

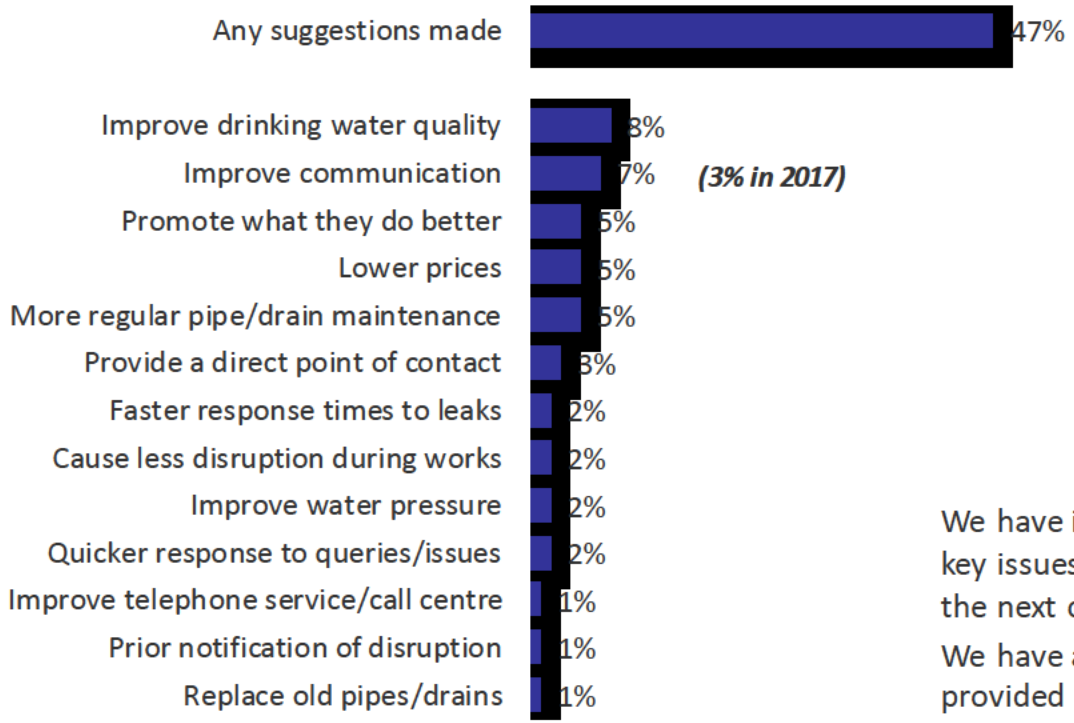
Base: all respondents, where answer given (as shown)

Q14

Customers' improvement priorities

Suggestions for improvement

Finally, respondents were asked if there were one thing their wholesaler could do to improve, what would this be.



(plus others mentioned by 5 or fewer each)

We have illustrated some of the key issues discussed here, on the next couple of pages.

We have also separately provided a full raw data file so that the company can review all of the verbatim comments made by respondents.

Base: all respondents (500)

Q15

Suggested improvements (1)

As was the case last year, water quality topped the list of suggested areas for improvement - for example:

The quality and the taste of the water. There is discolouration a couple of times a week and the water tastes like chlorine

We have hard water, it's constantly hard. We have to pay people to come and clean the washing machine and other appliances professionally as the hard water over time damages the appliances

The quality of the taste of the water - it seems pretty substandard and we struggle with limescale in a lot of our appliances. Some employees are bringing in their own Brita filters

The water quality definitely need sorting, it's cloudy and white looking. The tap needs to be run for a couple of minutes and it's still not fully clear and has an odd taste. The quality has been like this for years

Water pressure was of concern for some:

Water pressure could be better and more notification when it's going to be turned off

The pressure is pretty rubbish here. It's too low and we've put electric taps in for washing hands and they don't always work. We might have to change them as the water doesn't come out when you put your hands under the taps

And drain maintenance:

When there is heavy rainfall we have a 'sewage smell' and they've had a look but it still stays, so that could do with being looked at

Whenever there's heavy rainfall our car park floods and the drains get full of water, it happens frequently. We had the drainage engineers sent out to get it sorted, it does actually cost the company every time

Suggested improvements (2)

The call for greater communication is gaining traction. Respondents want more contact generally and would like to know more about what the wholesaler is responsible for, and who they should go to if there is a problem or if advice is needed:

We have no contact with them whatsoever. They should communicate and contact us more often

Send some information out so people know more about what they're about. I'm unaware of the difference between what you're on about, I had no idea there was any of that going on

Just to make us knowledgeable in things, for example if we should be testing the water and who do we go to if there is a problem

It would be good to know the details and responsibilities of the wholesaler with some leaflets or a letter, just to inform us of what their roles are as our relationship tends to be just with the retailer

Provide us with more information about their services, what they offer and how they work

Information of when to contact the wholesaler and when to contact the retailer to avoid doubt

Communication. There are lots of things there I don't know, for example I don't know about the local environment. A local newspaper maybe, what they're doing long-term, if they're being proactive

Clearer communication with what has happened with the wholesale/retail thing. The most pertinent thing is you said 'Who would you contact?' It used to be just one number and now it is split between wholesale and retail. I wouldn't know who to be contacting

Q15

Suggested improvements (3)

A direct point of contact would also be welcomed, or improvements to the call centre telephone system, which can be irksome to some when they do have an issue:

Less time spent hanging on the phone waiting

What I suggest is that they interact between departments as they don't know what they are doing. They always say you have come through to the wrong department. They keep referring me to another number. They are completely disorganised. It's so frustrating. I went from one department to another and then the phone went dead. She gave me a number and then when I rang it I was told to ring the original number again

Be able to pick up the telephone and ring someone and speak to them about the problem direct, instead of going through all these different channels

To be contactable, to respond to emails and not to have an answerphone that cuts out

And finally, a bit more proactivity would go down well:

Be more proactive rather than reactive. If they understand that a repair needs doing then they should attend to it before it gets broken

Probably more checks for the sewerage area for us. I have never seen them here in the whole time I have been here which is 7 years

More checks so they can keep on top of any issues, so double checking the water supply more often

To give more calls to check everything is okay

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