



E053

# NWGW

## Water Environment Improvements customer research

**Research report** March 2021

# Executive summary

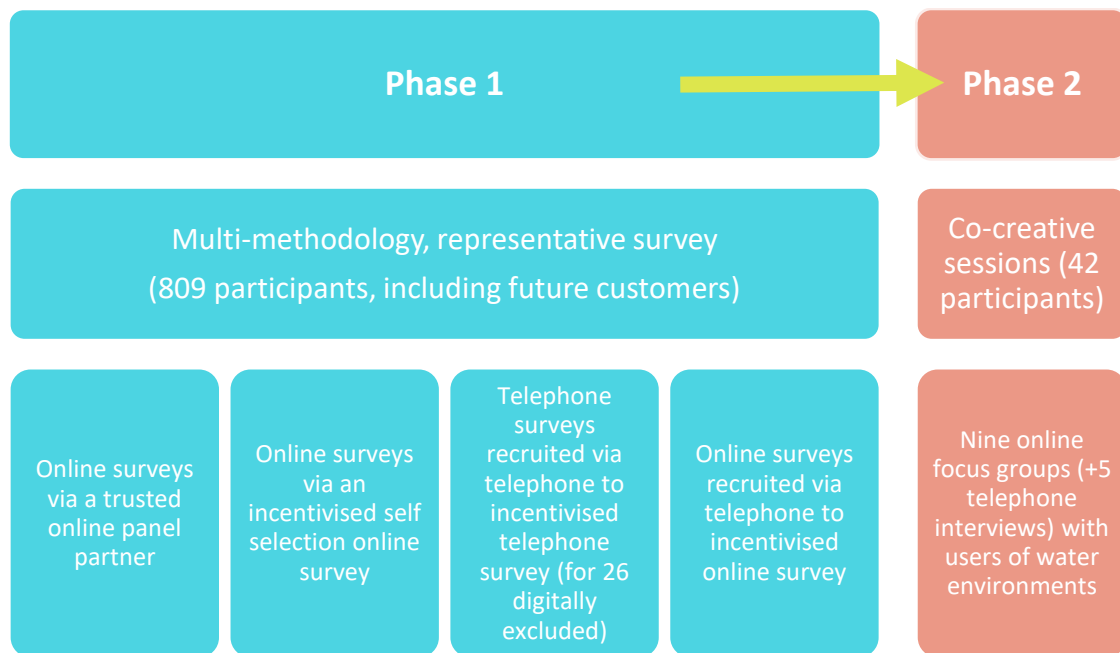
## Background

One of Northumbrian Water Group's (NWG) bespoke Performance Commitments (PCs) is the Water Environment Improvements Performance Commitment (PC) - a commitment to improving wider aspects of at least 50km of water environments that people can access, for the benefit of customers and communities. This work will take place across NWG's operating areas in the North East, Essex, Suffolk and Norfolk from 2020-25.

NWG commissioned Explain to independently research how local people would like the new PC to be developed, as well as how ambitious they would like NWG to be about improving water environments in their regions.

## Methodology

To both **quantitatively** measure the views of local people and engage **qualitatively** to enable schemes to be co-created with customers, a two-phase approach was chosen. A total of 851 local people took part between December 2020 and February 2021, during the COVID-19 pandemic and varying levels of lockdown.



## Results

### Use of Water Environments

- More than 40% of survey respondents visited water environments at least monthly. 12% rarely or never visited any. More visited rivers (42%) and the coast (41%) than streams (36%) or lakes/reservoirs (24%).
  - o When reviewing results by SEG, those in SEG ABC1 were significantly more likely to attend both rivers and streams than those in groups ABC1.
- ESW respondents were more likely to visit lakes and reservoirs more frequently (21% of ESW respondents visited lakes or reservoirs between daily and 2 to 3 times a month, compared to 13% of NW respondents).
- NW respondents were slightly more likely to visit coasts and beaches more frequently (13% visited at least once a week compared to 10% amongst ESW respondents).
- The most commonly cited reasons for visiting water environments among all respondents were general walking, dog walking, exercise and to access the sea or paddle. Some respondents also visited water environments to spend time with friends/family or for wellbeing/relaxation, with respondents finding being around water peaceful and relaxing.
- Most respondents were satisfied with the last water environment they visited (56-79%, depending on the type of environment).
  - o When reviewing results by SEG, there were no significant differences in satisfaction between SEG groups.

### Levels of concern (survey only)

- Respondents were asked to rate how concerned they were about various pre-selected topics, and levels of concern were compared.
- The largest concern was about the impact of COVID-19 on the UK economy, with 93% concerned (slightly or very), and 90% felt this way about its effect on their region.



- The next highest concern was climate change (81% either slightly or very concerned) and wildlife and habitats in their local area (77%). Interestingly, these environmental issues were of more concern than their personal health and wellbeing (71%) and personal finances (56%).
- Most participants were concerned about the environmental issues mentioned, with only 5% unconcerned about climate change and 7% unconcerned about wildlife and habitats in their local area.
- When reviewing results by socio-economic group (SEG), those in SEG C2DE were significantly more likely to state that they were 'very concerned' about personal finances than those in SEG ABC1 (27%). In addition, those in SEG C2DE were significantly more likely to state that they were 'very concerned' about wildlife and habitats in their local area than those in SEG ABC1 (27%).

## Support for the Water Environment Improvements programme and preferred focus

Before answering any questions about the Water Environment Improvements programme, survey respondents watched a short video or read a transcript (if non-digital) about the Water Environment Improvements programme provided by NWG, which introduced the programme and provided examples of some improvements that could be made.

- Overall, more than three quarters of survey respondents agreed with the statement *"I value NW/ESW making investments to improve water environments for the benefit of customers"* (79%).
  - o When reviewing results by SEG, those in groups ABC1 were significantly more likely to 'strongly agree' with this statement (44%) than those in groups C2DE (37%).
- Just over half (55%) of survey respondents wanted NW/ESW to focus investment on smaller, more local water environments because these are often 'forgotten', to help the environment and to encourage tourism/boost the local economies.
- 42% of survey respondents felt that NW/ESW should focus on their most popular water environments that already attract a lot of visitors. Key reasons were to help encourage more tourism or help the economy, and because popular places need continuous maintenance and improvements made.
- Areas of improvement viewed as the highest priorities among survey respondents were 'seeing and hearing wildlife and enjoying nature' (53% selected this) and 'water quality aspects – its quality and appearance or odour' (47%).



- When reviewing results by SEG, there were no significant differences found in terms of priorities.
- In terms of access and recreational facilities, an improvement often suggested by survey respondents was to have more toilets. Following this, respondents wanted to see more cafes, visitor centres, playgrounds and picnic areas. Survey respondents also suggested 'better accessibility,' as well as having cleaner facilities and more bins provided.
  - Amongst qualitative respondents, unprompted conversation swayed organically to a focus on accessibility, particularly in relation to car parking and accessible walkways. *\*Please note, however, that the information provided to respondents in the qualitative phase was slightly different to the information provided in the survey. For example, survey respondents were provided with a prompted list of possible improvements to water environments and asked to pick their top three priorities prior to being asked open questions around access and facilities, however, qualitative respondents were only asked about these three areas in an unprompted way, with no specific mention of the types of improvements that NW/ESW could make at this stage in the conversations.*
  - Other key aspects that were mentioned in terms of expectations respondents would have in relation to accessibility included;
    - ♣ To ensure that there is adequate lighting near water environments at night to avoid accidents (Durham only)
    - ♣ To cut grass and overgrown vegetation to ensure pathways are clear and accessible.
    - ♣ To reduce flood risk of footpaths and maintain sensible water levels to avoid accidents.
    - ♣ Signage to ensure safety.
- In terms of wildlife, survey respondents wanted to see more birds in their local water environments, and many felt that any additional wildlife would be a good thing.
  - Similarly, those who took part in the qualitative phase felt that they would like to observe more wildlife in their local area and also to know more information about local wildlife. *\*Please note, again, that the information provided to respondents in the qualitative phase was slightly different to the information provided in the survey.*



- Other key aspects that were mentioned in terms of expectations around wildlife included;
  - ♣ Maintain and preserve natural habitats and ecosystems.
  - ♣ Ensure that natural ecosystems are not disturbed by humans/general infrastructure.
- In terms of water quality, 13% of survey respondents felt that it was important for surfaces around water environments to be cleaned more regularly and to have better litter control around these environments. However, 8% of surveyed respondents were happy with the water quality as it is.
  - Similarly, in the qualitative phase, water quality was seen as important, with a minimum expectation that both the water itself and the surrounding area was clean and well maintained. *\*Please note, again, that the information provided to respondents in the qualitative phase was slightly different to the information provided in the survey.*
  - Key aspects that were mentioned in terms of what would be considered ‘clean’ and ‘well maintained’ included the following.
    - ♣ Ensure that water is safe for human health if they were to use the water environment, e.g., for leisure activities such as swimming.
    - ♣ Ensure that water is free of algae/chemicals/foam.
    - ♣ Ensure that there is no rubbish left in water or surrounding areas (or to be cleaned up as soon as possible if so and bins emptied regularly).
    - ♣ Ensure that water is safe and habitable for wildlife to live.
- In terms of how projects should be proposed, the most popular choice amongst survey respondents was for NW/ESW to let environmental experts suggest possible projects (60%). In addition, most felt that NW/ESW should choose the projects that will have the biggest impact on local wildlife and plant life (61%). When reviewing results by SEG, those in groups ABC1 were significantly more likely to suggest that NW/ESW should let environmental experts suggest possible projects (65%) than those in groups C2DE (56%), whereas no significant differences were found in terms of how NW/ESW should choose projects.



- Similar to the findings from the quantitative phase, most qualitative respondents had a preference for environmental experts to suggest projects (13 respondents/54%). *Please note, this question was asked in a live poll.*
- Similarly, the most popular response in the qualitative phase was also for NW/ESW to 'choose those that will have the biggest impact on local wildlife and plant life' (9 respondents/32%). *Please note, this question was asked in a live poll.*
- There was a keen willingness to be involved in local projects, with most respondents wanting to hear about projects through the local media (86%) and have the opportunity to help decide what improvements will be made (84%). Nearly two thirds wanted the opportunity to volunteer to help deliver the improvements (64%). When reviewing results by SEG, those in groups C2DE were significantly more likely to want to have the opportunity to volunteer to help deliver improvements (71%) than those in groups ABC1 (57%).
  - In the online focus groups, there was a similar keenness to be involved in projects, with 26 out of 28 respondents who were asked this keen to have the opportunity to help decide what improvements will be made. All in-depth interview respondents who were asked about willingness to be involved in local projects wanted to hear about projects through the media, have the opportunity to help decide what improvements will be made and have the opportunity to volunteer. *Please note, this question was asked in a live poll.*
- When asked how they'd like to be involved, there was clear enthusiasm in open responses for respondents to both be kept up to date about projects and to physically be involved (e.g. volunteering to help with local projects).

## Case study feedback (qualitative phase only)

- Three case studies of examples of that were either planned, in progress or completed, of NW/ESW working in collaboration with partners and examples of specific changes to be made in the hope of making improvements were shared with qualitative respondents (please note these differed between NW and ESW). Across all groups, the case studies presented to respondents were received positively.



## NW

### Kielder Water and Forest Park enhancement

- Some respondents in the NW groups, particularly in Alston and Ashington, felt that there wasn't a need to invest more money into Kielder as this was already in a good condition, however there was a general keenness for the addition of a dedicated ranger to protect the red squirrel.

### Royal Quays Marina

- Across all NW groups, there was consensus that the Royal Quays Marina project was a worthwhile area to focus on as it is accessible to lots of people.

### Upper Skerne Bridleway and river restoration

- Fewer respondents in the NW groups were aware of Upper Skerne Bridleway but felt that this project would have a positive impact on wildlife and biodiversity.

### Priority project

- Across the NW groups, there were varying views on which case study should be greatest priority. In Alston, all respondents favoured improvements to Upper Skerne Bridleway, but across the other groups, the preference tended to be for improvements to Royal Quays Marina, predominantly because this would have the greatest impact on the largest number of people and could also attract more visitors and businesses to the local area.

## ESW

### Carlton Marshes

- In the ESW groups, all respondents liked the project in Carlton Marshes and felt that this covered their key priorities in terms of accessibility and facilities.

### Bocking Mill

- Again, across all ESW groups, respondents liked the Bocking Mill case study and particularly liked the sound of the educational element of this project.

### Chelmer and Blackwater Navigation

- Across all ESW groups, respondents felt that improvements to the paths at Chelmer and Blackwater Navigation was a very high priority and highlighted the importance of ensuring the area was maintained over an ongoing period.





### Priority project

- In Chelmsford, most respondents felt that improvements to Chelmer and Blackwater were those that would have the greatest impact on themselves directly, however across all groups, respondents also tended to particularly like the improvements suggested to Carlton Marshes.

### Co-creating possible local improvements and proposed scheme feedback

- A high number of specific locations were identified across amongst survey respondents and across all qualitative discussions as areas that NW/ESW could/should focus on in terms of making improvements across the three areas; water quality, wildlife and accessibility.
- Amongst survey respondents, 72 specific locations were suggested by respondents for NW/ESW to consider in their programme. Themes included cleaning areas and clearing rubbish, more facilities, improving accessibility and footpaths, and encouraging more wildlife.
- Amongst qualitative respondents, 51 specific locations were suggested for NW/ESW to consider. Again, themes included cleaning areas and clearing rubbish, more facilities, improving accessibility and footpaths, and encouraging more wildlife.
- Some locations/improvements were identified by focus group respondents without being prompted, that NW/ESW had already considered at the time of the qualitative research as they had been mentioned in previous customer/stakeholder research, or in the quantitative phase of this research. These can therefore be considered to have a degree of customer support and therefore may be worthy of further exploration for feasibility. These were:

NW	ESW
Wansbeck Barrage	Hanningfield Reservoir
River Wear	Hornchurch Park
Tees Barrage	Chelmer Navigation
Hawthorn Dene	

### Monitoring improvements (qualitative phase only)

- Across all groups and in-depths, respondents highly valued NW/ESW making investments with the aim of improving water environments for the benefit of customers.



- The majority of respondents felt that it was highly important to ensure that NW/ESW monitor (i.e. by observations, checking water quality etc.) the changes they make on an ongoing basis and to convey the outcomes to members of the public. Across the groups, the main benefit of monitoring changes on an ongoing basis was to ensure that changes had been successful, and targets met, i.e. improvements made in the ways that activities were targeting.
- As well as monitoring the changes made in terms of the outcomes of the programme and making the public aware of these, there was mention in the majority of groups that it was also key for NW/ESW to continue with the upkeep and maintenance of any improvements that are made on an ongoing basis to ensure that efforts aren't lost over time and to maximise cost-benefit. . *\*Please note, however, that NWG do not own all aspects of improvement proposals, and therefore cannot guarantee continued support.*
- There were various suggestions for how NW/ESW could keep members of the public up to date and be transparent about progress, for example via social media, sharing key KPIs on their websites, introducing volunteer wardens, within their annual report, via stories in local newspapers and by including information within water bills.

## How ambitious should NW/ESW be with this programme? (survey only)

Before answering questions in relation to how ambitious NW/ESW should be with the programme, all respondents watched a short video (or read a transcript of) that provided information on the impact this would have on customers' bills.

- 84% of NW respondents and 80% of ESW respondents stated that they would be willing to pay an additional 90p (NW) or 44p (ESW) to make improvements to 200km of water environments; acceptance surpassed CCWater's acceptability threshold of 70-75%.
- 74% of NW respondents and 72% of ESW respondents stated that they would be willing to pay an additional £1.80 (NW) or 88p (ESW) to make improvements to 400km of water environments. Again, willingness amongst customers met the CCWater acceptability threshold.
- Across all respondents, there was a high level of support for continuing this work past 2025 amongst both NW and ESW audiences. Overall, 90% of NW respondents wanted to see the work continue past 2025 and 88% of ESW respondents did.
- When reviewing results by SEG, no significant differences were found in terms of how willing respondents would be to pay more, or levels of support for this work to continue past 2025.



## Closing perceptions

- When asked at the end of the survey about their perceptions of NW/ESW again more respondents rated these as either 'positive' or 'very positive' (80%) than they did at the start (64%).
  - o This question was also asked in some of the qualitative discussions, with those asked saying that they felt pleasantly surprised that NW/ESW were investing in improvements to water environments. However, please note that this was only asked to a small number of people.
- In addition, mean satisfaction scores both overall, and across each respondent type, increased amongst survey respondents after completing the survey. Overall mean satisfaction scores increased by 0.4 to 7.9.
- Finally, all NPS scores provided also increased after completing the survey. Overall NPS increased by 15 to +13.
- These results indicate that educating about and involving local people in the Programme may increase satisfaction, improve perceptions of NW/ESW and drive a more positive NPS, particularly moving neutral perceptions towards positive. This will be important as NWG begin to pursue activities in local areas, particularly considering engagement with younger age groups who had fewer positive perceptions than the older age groups, and provides indicative evidence that awareness and experience of the Programme has the potential to positively impact NWG's C-MeX results over time.
- Satisfaction with the research itself was also high amongst survey respondents.



## Overall recommendations

A summary of the key recommendations to take forward from this research are as follows;

### Focusing investments

- Focus investments on a mixture of popular water environments and smaller, more local water environments, as a clear customer preference was not identified here.
- Based on results in relation to visitation, when seeking to make improvement in ESW areas, consider more of a focus on lakes and reservoirs and when seeking to make improvements in NW areas, consider more of a focus on coasts and beaches.
- Improvements made to water environments should focus on boosting wildlife and/or improving overall water quality (its quality and appearance or odour) as these were the overall priorities for respondents.
  - o Ensure that water environments are cleaned regularly and thoroughly.
- When thinking about the addition of new facilities, consider the importance of toilet facilities and ensuring these are accessible to all.
- Consider ways in which a higher number of birds could be encouraged in and around water environments, for example by the introduction of more bird boxes.
- Seek to involve environmental experts in the process of choosing specific projects to work on.
- When considering where to make investments, aim to strike a balance between making improvements to local water environments but also ensuring they do not become overly busy. In addition, aim to strike a balance between making improvements that will benefit local people and making improvements that will benefit wildlife and local ecosystems.

### Keeping local communities involved

- Take on board the willingness of community members to get involved with local projects, for example by considering volunteer schemes or a working party. Consider the most appropriate way to encourage community members to get involved with projects, both in the short and long term, particularly considering the ongoing pandemic.



- Consider ways in which to keep local communities up to date on local projects that are upcoming/currently in progress – whether this be via leaflets, social media, local media or direct contact such as public meetings (when social circumstances and government guidance deem this appropriate).
  - o Also consider ways to keep local communities up to date on local projects on a more ongoing basis including upkeep and ongoing maintenance, e.g. by via social media, sharing KPIs on the website, within annual report, within local newspapers and by including information within water bills.
  - o Ensure transparency when updating local communities (this was about being open and honest about improvements that are made, the impact of projects, timescales and maintenance, rather than directly about cost).
- Consider utilising the NWG online forum (Have Your Say) to continue engagement around the Water Environment Improvements Programme, for example testing proposed schemes.

## Locations for consideration

- Review specific suggested locations listed by respondents and consider these areas for projects, focusing on: cleaning areas and clearing rubbish, introducing more facilities for visitors, improving accessibility and footpaths, and encouraging more wildlife.
  - o Further explore areas that have been identified for improvement on multiple occasions, such as:

NW	ESW
Wansbeck Barrage	Hanningfield Reservoir
River Wear	Hornchurch Park
Tees Barrage	Chelmer Navigation
Hawthorn Dene	

## Programme duration

- Results suggested that survey respondents want to see the programme continue past 2025, so think long term in your planning and community engagement around improvement activity.



## Wider considerations

- For wider activity, keep in mind the high levels of concern amongst local people in the operating regions in relation to the impact of the COVID-19 pandemic, and for non-bill payers in relation to their own personal finances. More support could be required in the future for the financially vulnerable.
- Also, keep in mind the level of concern amongst local people in relation to climate change and wildlife and habitats in their local area and the secondary benefits that that the Water Environment Improvements programme may have.
- Perceptions of ESW are less positive than for NW. This is most pronounced amongst the younger age groups and non-bill payers, which is to be expected when they don't currently have a relationship with the company. Consider ways to boost perceptions, satisfaction and NPS amongst those living within the ESW operating area, and amongst the youngest and non-bill payers. As scores across each of these increased after the survey, educating customers may be important when looking to boost these scores.



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## Introduction

An overview of the project background, objectives and methodology.



# Introduction

## Project background

For the 2019 price review (PR19), there are two types of Performance Commitments (PC) – common and bespoke. Whilst common PCs are standard across all water companies, bespoke PCs are proposed by individual companies based on their own circumstances and customer preferences.

One of Northumbrian Water Group's (NWG) bespoke PCs is the 'Water Environment Improvements' PC - a commitment to improving wider aspects of at least 50km of water environments that people can access for the benefit of customers and communities. This work will take place across NWG's operating areas in the North East, Essex, Suffolk and Norfolk.

As with the rest of NWG's PR19 business plan, it's important to NWG that customers and stakeholders are involved in the co-creation of plans to achieve this, and to ensure that activities reflect their priorities and expectations.

Explain was therefore commissioned to carry out independent research to understand customers' views in relation to the development of NWG's new bespoke 'Water Environment Improvements' PC, as well as views about NWG's overall ambition to improve water environments in its regions. In addition, due to the nature of this PC, NWG also wanted to uncover specific local insights (e.g. specific sites, access and local partners NWG could work with) so that targeted plans can be made.

The following report details the results of both the quantitative and subsequent qualitative phase of research.

## Objectives

The core objectives for this research were to understand customer opinions on:

- The value of water environments to them;
- Improvements they would want to see NWG deliver, and how these could be managed practically;
- Any conditions of their support, including where funding should come from, and
- Ultimately, the level of ambition they want to see from NWG for this PC.

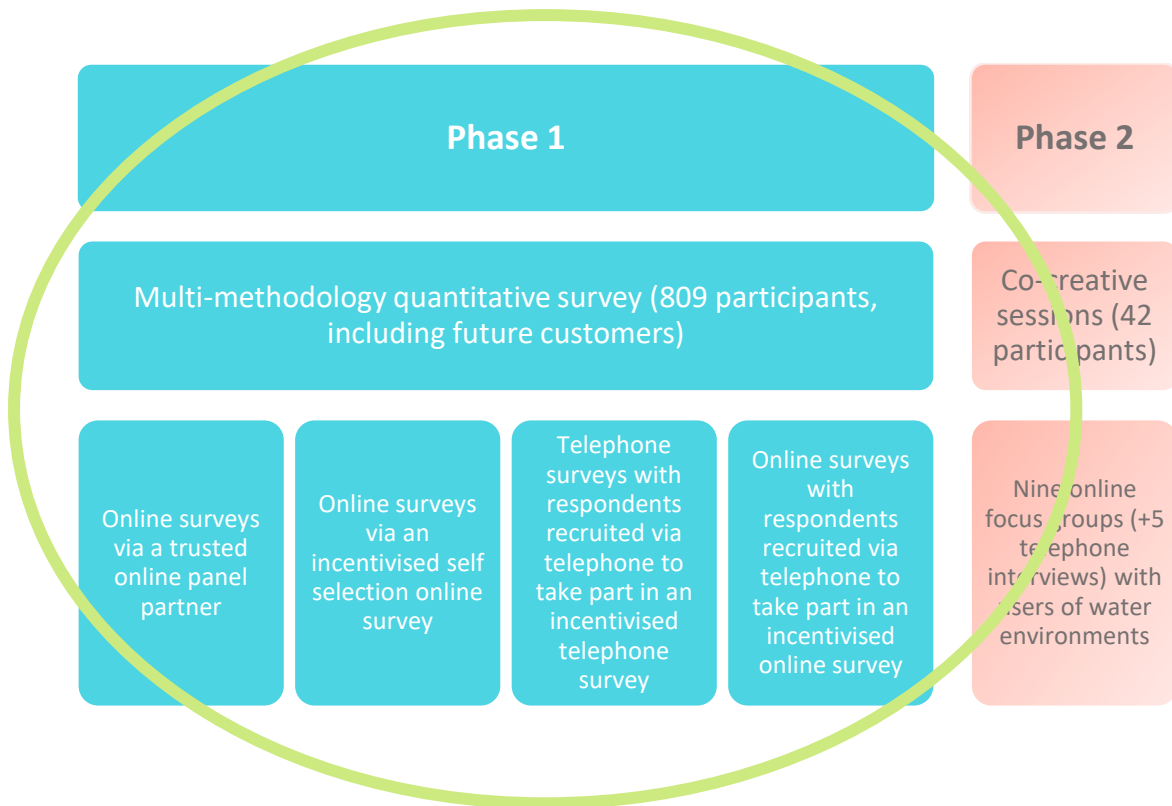


## Methodology

To both **quantitatively** measure expectations of local people and engage with customers **qualitatively** to allow for co-creation, a two-phase approach was chosen.

### Phase 1

For the first phase of the research (phase 1), a quantitative survey was designed to broadly measure customer expectations around NWG activity to improve the water environment.



### Designing the survey

Based on the overall objectives of the project, the survey was designed to be deliberative in nature, ensuring that respondents were educated about the Water Environments Improvements PC prior to capturing their opinion. To achieve this, the survey contained background information about NWG and the operating areas of Northumbrian Water (NW) and Essex & Suffolk Water (ESW), as well as two videos – one introducing NW/ESW’s Water Environment Improvements approach, and one highlighting how targets will impact customer’s bills (see Appendix 5 in the accompanying document).



The survey was designed to last approximately 20 minutes, with all respondents incentivised for completion.

The survey was structured as follows (please note, a full copy of each survey can be found in Appendices 3 and 4):

- Introduction and initial screening questions
- Other profiling information, e.g. household, statements about life today
- Introduction to NW/ESW
- Introduction to water environments
- Introduction to the Water Environment Improvements programme (including a video provided by NWG – see Appendix 5)
- The focus of the Water Environment Improvements programme and how the programme could work in practice
- How ambitious NW/ESW should be with this programme (including a video provided by Explain – see Appendix 5)
- Final questions (e.g., repeat of satisfaction and NPS)
- Evaluation of the survey itself – asking respondents to rate their understanding of the information provided and the questions that were being asked.

Written transcripts of the two videos were also provided to respondents if they wished to take their time to read the content.

## Cognitive interviews

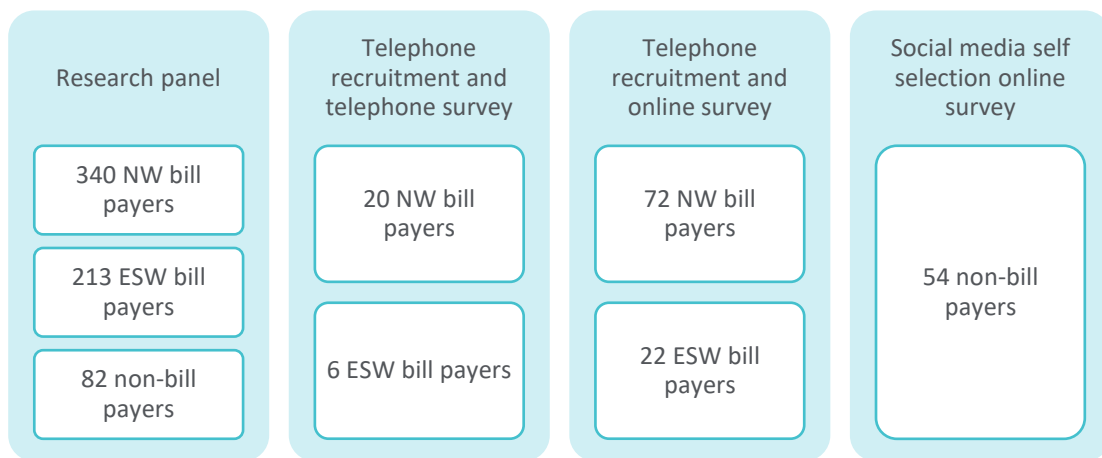
To ensure respondent understanding, five cognitive tests were conducted by Explain before the survey was finalised. Cognitive interviews were conducted via virtual screensharing, with a researcher observing the respondent completing the survey. They asked the respondent to vocalise their thoughts on the survey and highlight any areas which were unclear or could be improved, such as language and terminology. Each cognitive interview lasted around 45 minutes, with respondents receiving £30 to thank them for their participation.



Following the cognitive interviews, a few small tweaks were made to the wording and flow of the survey. In addition, further instruction was added to the survey where respondents were unsure what was required of them to answer a question.

## Survey distribution

To achieve a robust sample of interviews, and ensure inclusivity and that non-digital customers could take part, a multi-methodology survey programme was chosen, combining both telephone and online surveying approaches as follows:



To reflect NWG's operating areas, a higher proportion of surveying was conducted with NW respondents than ESW. In addition, quotas were set on the demographics of each region to ensure that the sample was representative in terms of gender, age and socio-economic group (SEG).

All respondents who completed the survey were incentivised for taking part. Incentives were processed following completion and quality checks by Explain.

### Approach to telephone recruitment

In total, 120 respondents were recruited to take part in the survey this way (vs. target 200), despite best efforts. NWG provided a customer database that was used as the population for the survey. Explain's in-house telephone research centre conducted outbound calls to these customers and a short recruitment survey over the telephone was conducted with those who were willing to take part in the survey (either via telephone or online). The recruitment survey was approximately five minutes long and was used to gather demographic profiling information, survey preference (telephone or online) and to organise a follow up phone call with those who wished to complete the survey over the telephone. A full copy of the recruitment survey can be found in Appendix 2.



In total **2,966** customers were contacted by telephone with the opportunity of taking part in the research.

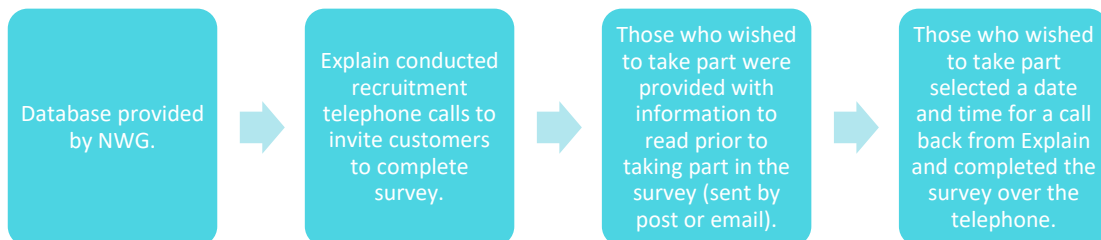
Of these, a total of 360 were recruited to complete the survey (vs. target 200) – 52 selected telephone and 308 selected online. For those who chose to complete the survey via telephone, the majority were non-digital customers.

- Of those recruited via telephone to complete the survey online, 94 went on to successfully self-complete the survey (72 NW customers, 22 ESW customers).
- Of those recruited to complete the survey via telephone, 26 went on to successfully complete the survey (20 NW customers, 6 ESW customers) with an interviewer.

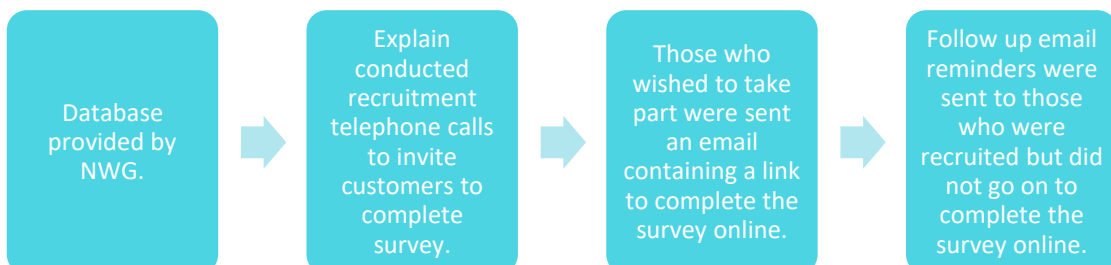
To achieve the overall target sample, quotas were increased for the research panel sample to compensate for the shortfall for the telephone recruited sample.

All customers who took part in the survey (either online or via telephone) that were recruited by Explain via telephone were incentivised with a £10 Amazon voucher upon completion.

#### Telephone recruitment and telephone survey in summary



#### Telephone recruitment and online survey in summary



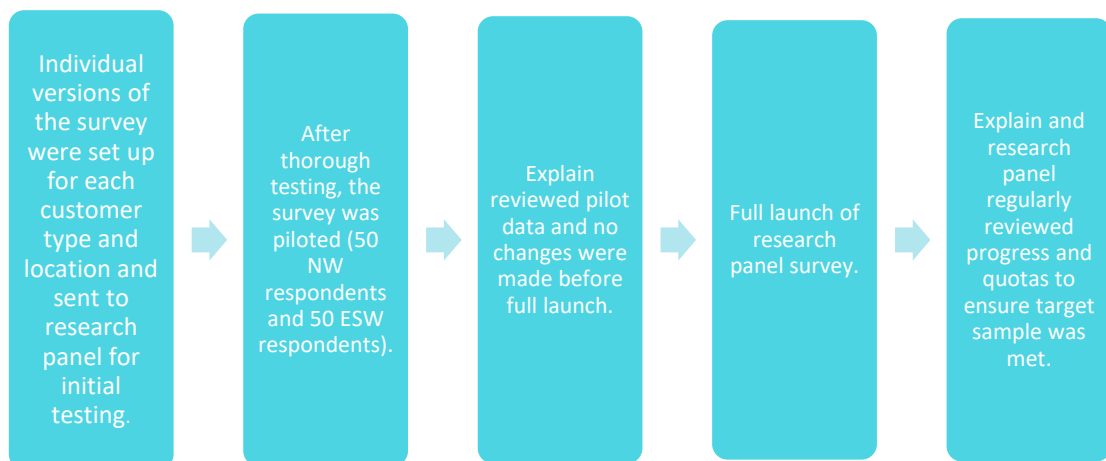
### Research panel

In total, 625 surveys (340 NW customers, 213 ESW customers and 82 non-bill payers) were completed via research panel, Dynata.

Sample sizes for the panel method were increased at 23<sup>rd</sup> December 2020 due to an expectation of a shortfall in sample of those who were recruited via telephone, following non-completion by recruited participants on receipt of the survey.

All respondents who took part in the survey via research panel were incentivised. Incentives for these respondents were managed and distributed directly through the panel provider.

The process for completion of the panel survey sample is shown below:

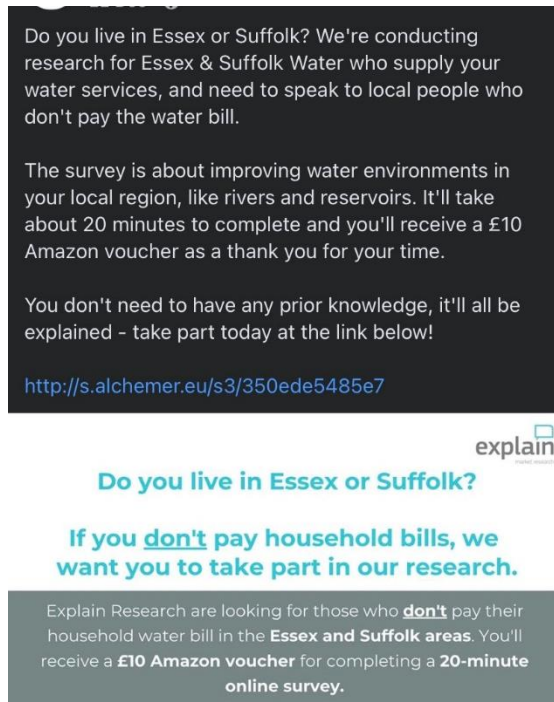


\*Please note, specific quotas were not set for 'non-bill payers' – they were allowed to fall out naturally.



### [Social media self-selection online survey](#)

To boost the sample and compensate for a shortfall in non-bill payer responses from the research panel sample (82 achieved out of target 100) and to meet the overall target sample for non-bill payers, social media posts containing the survey link were shared by Explain on Facebook:



Do you live in Essex or Suffolk? We're conducting research for Essex & Suffolk Water who supply your water services, and need to speak to local people who don't pay the water bill.

The survey is about improving water environments in your local region, like rivers and reservoirs. It'll take about 20 minutes to complete and you'll receive a £10 Amazon voucher as a thank you for your time.

You don't need to have any prior knowledge, it'll all be explained - take part today at the link below!

<http://s.alchemer.eu/s3/350ede5485e7>

**Do you live in Essex or Suffolk?**

**If you don't pay household bills, we want you to take part in our research.**

Explain Research are looking for those who **don't** pay their household water bill in the **Essex and Suffolk areas**. You'll receive a **£10 Amazon voucher** for completing a **20-minute online survey**.

The survey link was shared from the Explain brand account, and each was also “boosted” whereby Facebook members aged 18-35 years old were targeted with the posts as ads based on their geographical location, i.e. they lived within the NW or ESW operating geographies. We could therefore expect to see a greater representation of younger age groups amongst this sample.

Reach (defined by Facebook as the number of people who saw the ads at least once) per region was:

- **NW:** 2,056
- **ESW:** 9,914

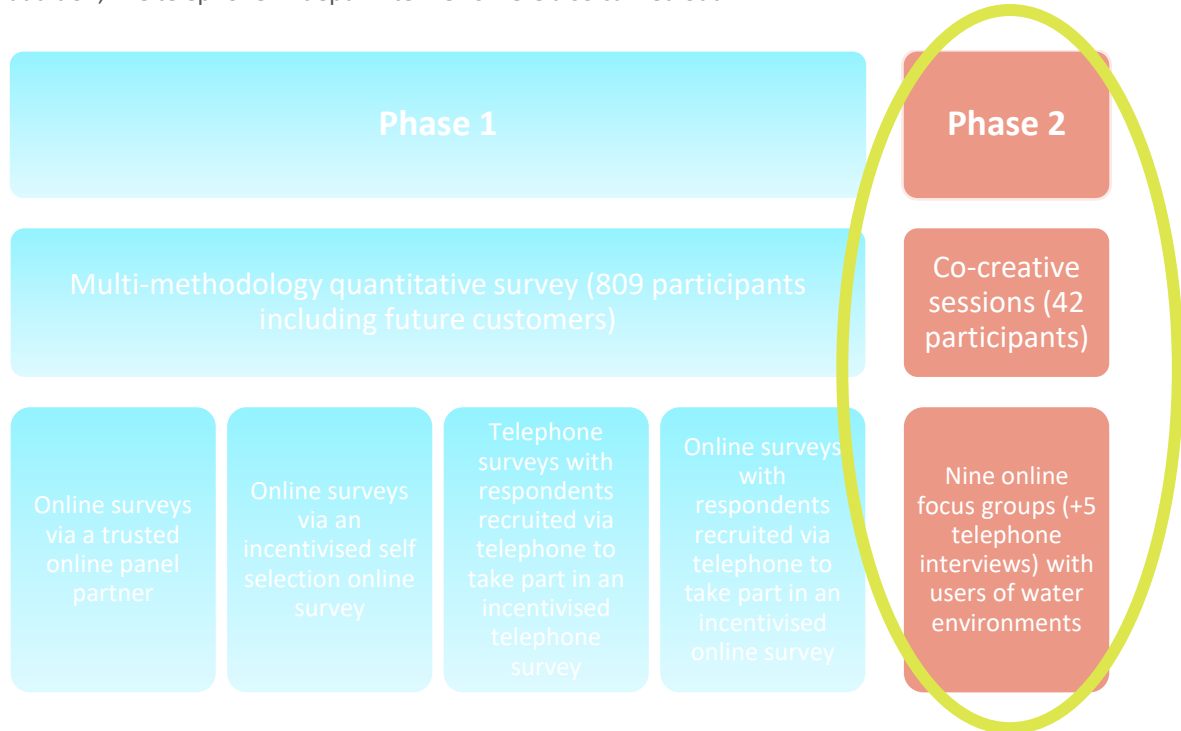
In total, **54** non-bill payers completed the survey online through social media (40 NW, 14 ESW).

\*Please note, specific quotas were not set for ‘non-bill payers’ – they were allowed to fall out naturally.



## Phase 2

For the second phase of the research (Phase 2), qualitative online focus groups were conducted via Zoom to co-create proposed improvements to key potential areas of the water environment. In addition, five telephone in-depth interviews were also carried out.



Focus groups for Phase 2 took place throughout January with customers (bill payers) who used water environments and lived in the following locations:

	Location	NW/ ESW	Date
1	Berwick	NW	19.01.20
2	Ashington	NW	20.01.20
3	Durham City	NW	21.01.20
4	Alston	NW	26.01.20
5	Billingham/Stockton	NW	27.01.20
6	Seaham/Blackhall	NW	28.01.20
7	Framlingham/Saxmundham	ESW	21.01.20
8	Chelmsford	ESW	27.01.20
9	Hornchurch/Upminster	ESW	28.01.20

Respondents were recruited to attend the sessions through a two-pronged approach – predominantly through telephone recruitment using a database provided by NWG, but also using local Facebook advertising (for Alston and some Ashington respondents specifically).





During recruitment, respondents were asked questions to determine eligibility and demographic profile. A full copy of the recruitment survey can be found in Appendix 9.

Given the COVID-19 pandemic, all focus groups were conducted online, lasting for a total of 90 minutes each. The focus groups took place via Zoom and each respondent was given a £40 incentive as a thank you for participation. This was payable as a cash BACS transfer or provision of an Amazon/High street voucher following participation, on the attendees' preference.

All groups were attended by two members of the Explain team – a facilitator and a support. The facilitator led the session and the support dealt with any technical issues respondents experienced, to ensure these did not distract from the discussion. All facilitators were Directors, Managers and Executives from across the business and all had vast experience in facilitation, including online facilitation. In addition, at least one observer from NWG was present at each group to answer any queries raised by respondents and clarify any points. External governance observers were also present at each group, including individuals from CC Water, NWG's Water Forum, National Farmers Union, Groundwork, The Environment Agency and local county councils.

Despite best efforts by Explain to ensure attendance at each group (including over-recruitment, onboarding with Zoom, multiple reminder texts and phone calls to check attendance in advance), overall the C2DE socioeconomic group was underrepresented. To compensate for this, an additional five in-depth interviews were carried out in to boost representation of C2DE respondents in the engagement. In-depth interviews were carried out by an Explain qualitative interviewer and respondents were each given a £40 incentive as a thank you for participation. Recruitment for the in-depth interview respondents followed the same process as those for the focus groups, in which respondents were asked questions to determine eligibility and demographic profile. All in-depth respondents were recruited using a database provided by NWG.

## Research tools

Following recruitment, focus group and in-depth respondents were sent a short briefing paper on the Water Environment Improvements scheme and its context so that they understood the background to the conversations. This briefing paper reflected the briefing materials shared with survey respondents.

Respondents were then asked to think about and make notes about the following ahead of attendance:

***– Which water environments do you have in your local area? Water environments include rivers, streams, lakes, reservoirs, canals, beaches, wetlands...***



*– Thinking about those you use/visit, what were your most recent experiences of these like? Were they positive, negative, or neutral experiences?*

*– What improvements would you like to see made at these sites? Thinking about things like...*

*o Access and facilities for visitors*

*o Water quality*

*o Wildlife and biodiversity.*

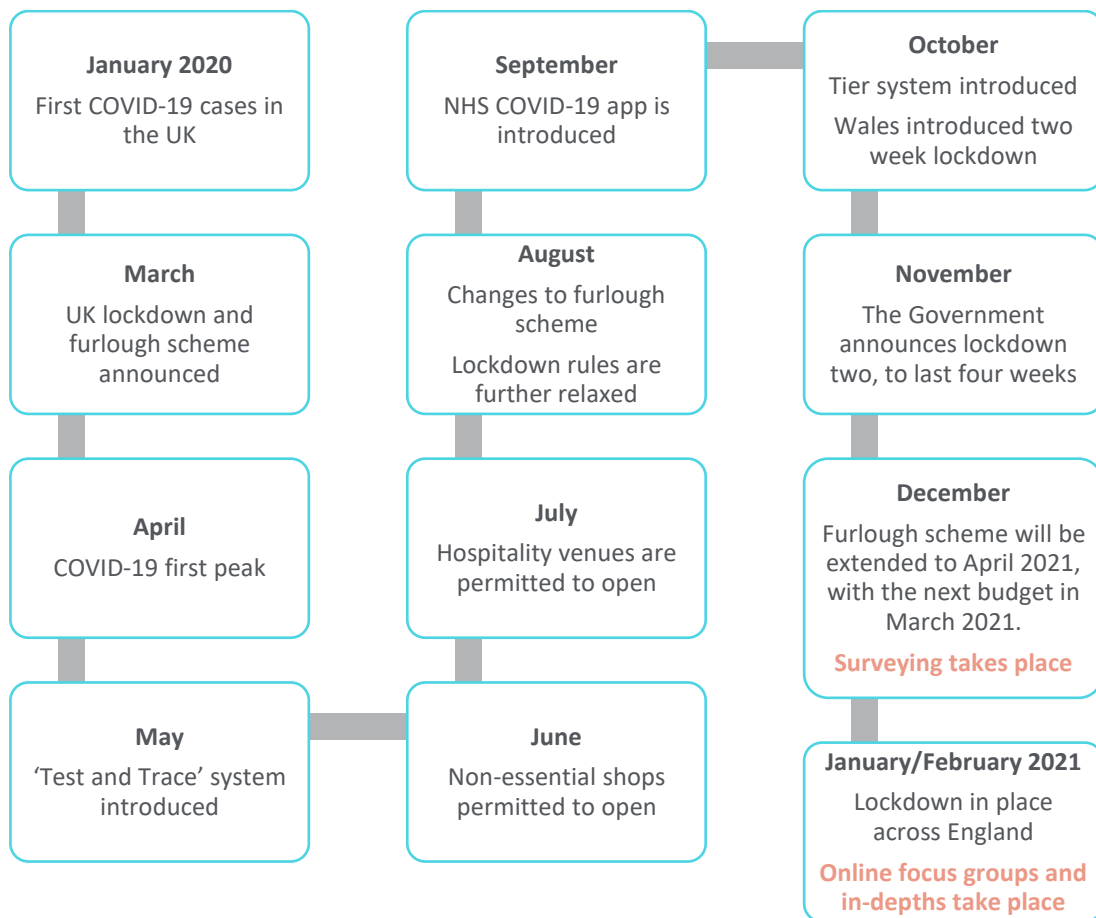
If they were able, respondents were also asked to send images of local water environments to the Explain team and images were used to support discussions (Attendee images were sent for the Alston, Durham and Stockton/Billingham groups and can be found in Appendix 18).

The discussion guide was developed to meet the overall project objectives and build on findings from Phase 1, such as project suggestions made by survey respondents. In addition, the discussion guide was developed to be both engaging and collaborative by incorporating brainstorming using the Miro online white board platform and voting via polls on Zoom to shape solutions. A full copy of the discussion guide can be found in Appendix 18.



## Fieldwork timing and context

Survey fieldwork took place throughout December 2020 and qualitative fieldwork took place throughout January and February 2021. During this time, the COVID-19 pandemic was ongoing. Throughout the UK, movement restrictions were in place under the Government's national tier system, including restrictions around visiting family and friends over the Christmas period. The economic outlook was poor – independent forecasts expected to see a contraction in UK GDP growth of -11%<sup>1</sup> for the year. The graphic below outlines the 2020/21 context, which should be remembered when considering the results shared in this report - in particular those which seek to understand participants' concerns and willingness to pay.



<sup>1</sup>

[https://assets.publishing.service.gov.uk/government/uploads/system/uploads/attachment\\_data/file/944626/Fo\\_recomp\\_December\\_2020.pdf](https://assets.publishing.service.gov.uk/government/uploads/system/uploads/attachment_data/file/944626/Fo_recomp_December_2020.pdf)



## Notes on analysis

### Phase 1

#### General

On completion of fieldwork, the data from each method was aggregated together and subsequently cleaned to ensure validity. This included the removal of duplicate responses, responses from individuals who were not living within NW/ESW operating areas, and responses of inadequate quality.

For the purposes of this report, overall figures have been provided throughout, as well as splits by location (NW/ESW). As demographic quotas were not set for non-bill payers, it is identified throughout the report where results provided relate to customers (bill payers), non-bill payers, or as overall figures for all respondents (bill payers and non-bill payers combined). The overall sample was weighted on SEG to bring the sample in line with original sample quota proportions, please see further detail below. Notable differences in views between bill payers (customers) and non-bill payers are identified.

All open responses have been thematically analysed and split by location to allow for any differences between operating areas to be drawn out. In addition, it is indicated throughout the report whether comments were made by bill payers or non-bill payers and any differences in open response themes are highlighted throughout.

Please note that 'don't know' responses have been excluded from analysis.

Due to rounding, percentages may not always add up to 100%.

#### Weighting

As most demographic proportions either met or were close to (within <5%) representative proportions (as set in quotas), no weighting was applied to age group or gender. Weighting has been applied to SEG to bring the sample in line with the original sample quota proportions for this, although please note this weighting is not significant.

**Weighted** percentages and base sizes for **overall** figures are reported throughout, and **unweighted** percentages are reported for **segments** (e.g. NW bill payers, ESW bill payers, NW non-bill payers and ESW non-bill payers). Base sizes remained consistent between the unweighted and weighted samples.



## Phase 2

### General

All focus groups and in-depth interviews were audio recorded and transcribed following completion. All transcripts have been thematically analysed and interpreted, with strategic recommendations for each location provided in the results section, alongside findings from Phase 1.

Following the first focus group (with respondents living in Berwick), some small changes were made to the discussion guide in terms of flow and content, to avoid duplication in conversations and to overcome technical challenges that arose with respondents using the Miro tool themselves. The Miro tool was used in all sessions but controlled by the facilitator in later sessions.

Please also note that although the discussion guide for the qualitative phase was designed to build on findings from Phase 1, there were some key differences in the information that was provided during each phase and the way in which questions were asked (for example, questions asked in the survey tended to be prompted and those asked in the qualitative phase tended to be unprompted). This should be a consideration throughout the report when interpreting the results and particularly when considering differences and similarities between each phase.





## **Respondent profile**

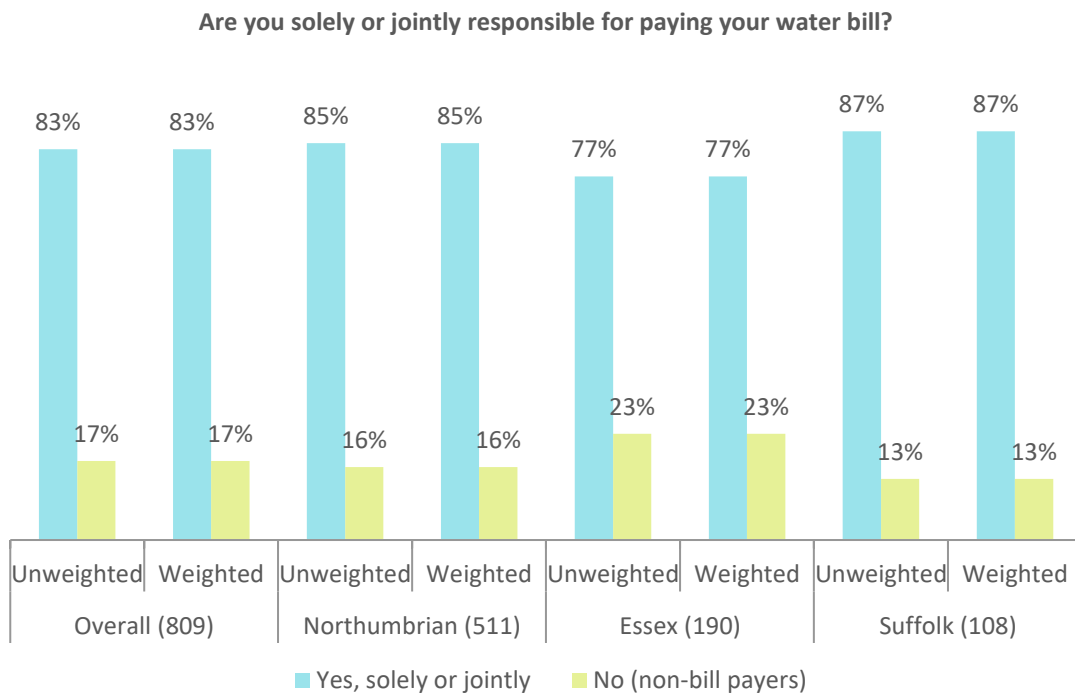
An overview of the profile of respondents who participated in the research.

# Respondent profile

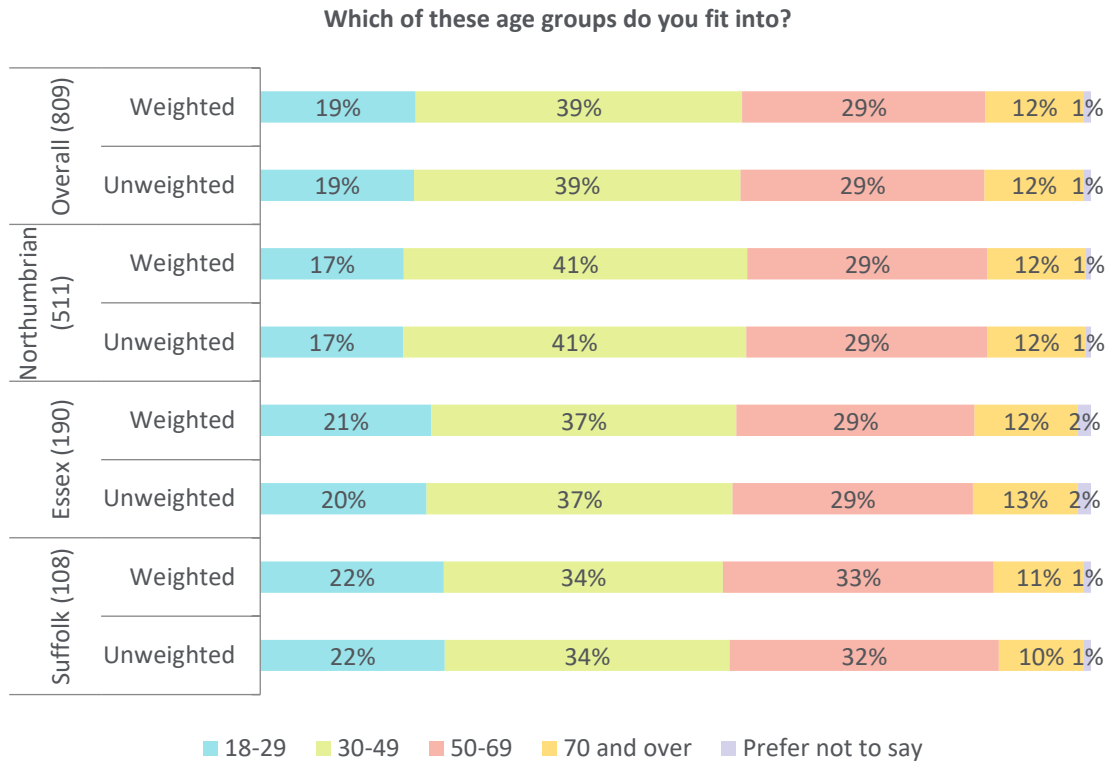
## Phase 1

Quotas were set during fieldwork on demographic factors to achieve a representative sample of bill payers. Demographics were captured for non-bill payers, but quotas were not set on these. For age group and gender, quotas were broadly achieved. Slight weighting was applied the sample so that it was more representative of NWG areas in terms of socio-economic groups.

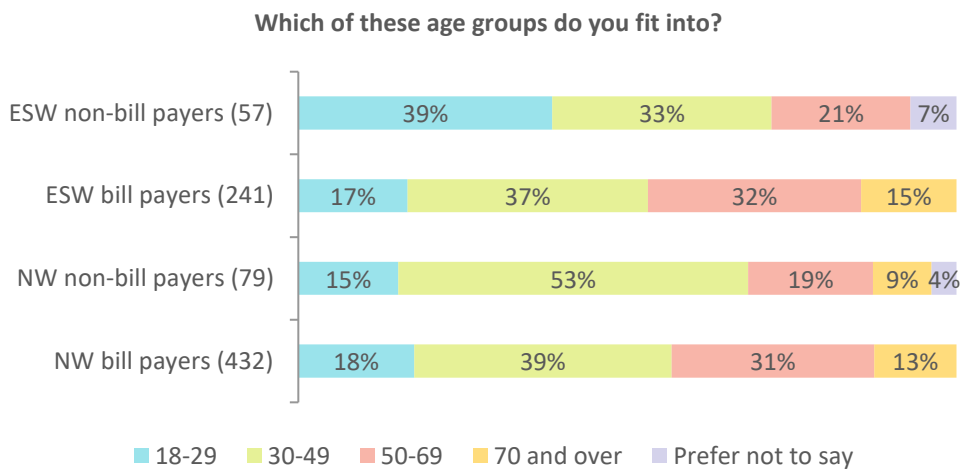
As desired by sample selection, most respondents in all operating areas were solely or jointly responsible for paying their household water bill.



The chart below shows the unweighted and weighted sample proportions of each age group in each operating area. For each region, the weighted and unweighted statistics are the same in this instance. They align with the representative proportions targeted and demonstrate that a mix of age groups were engaged in the research across all operating areas.

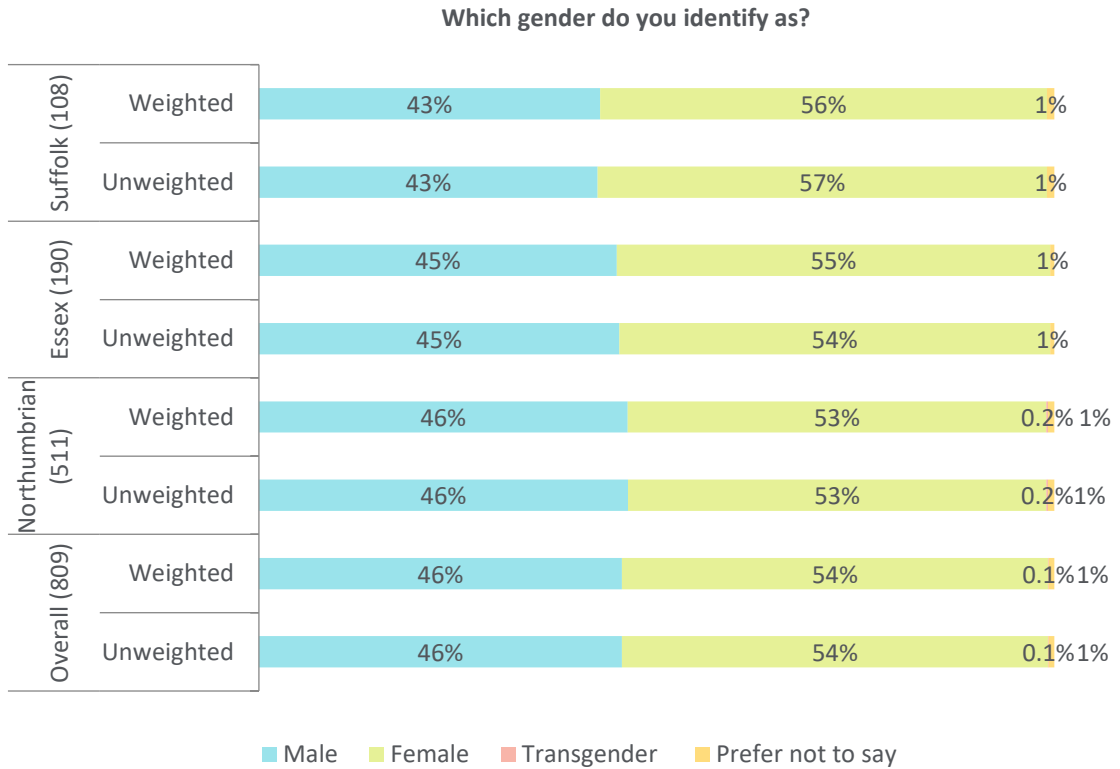


There was a higher proportion of 18-29 year-olds in the ESW non-bill payer group (39% of non-bill payers), while over half (53%) of NW non-bill payers were in the 30-49 age bracket.

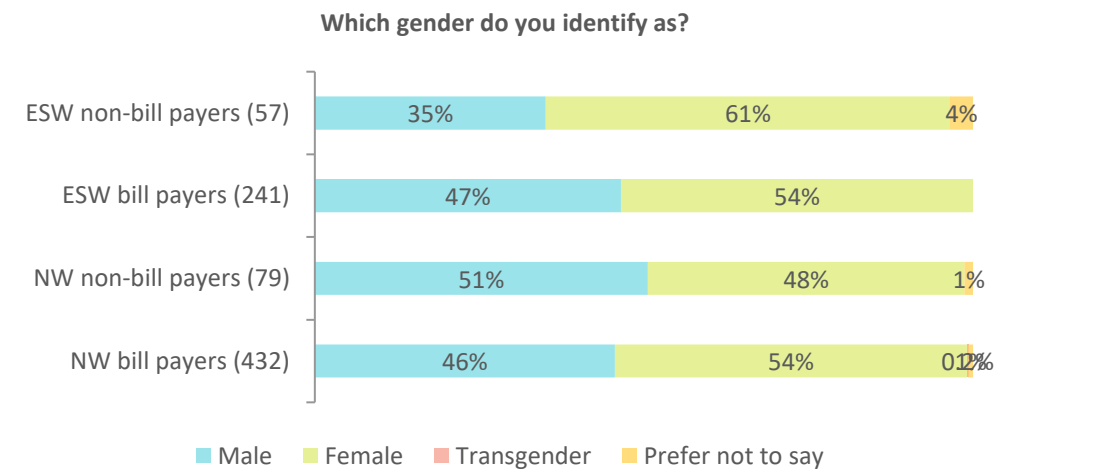




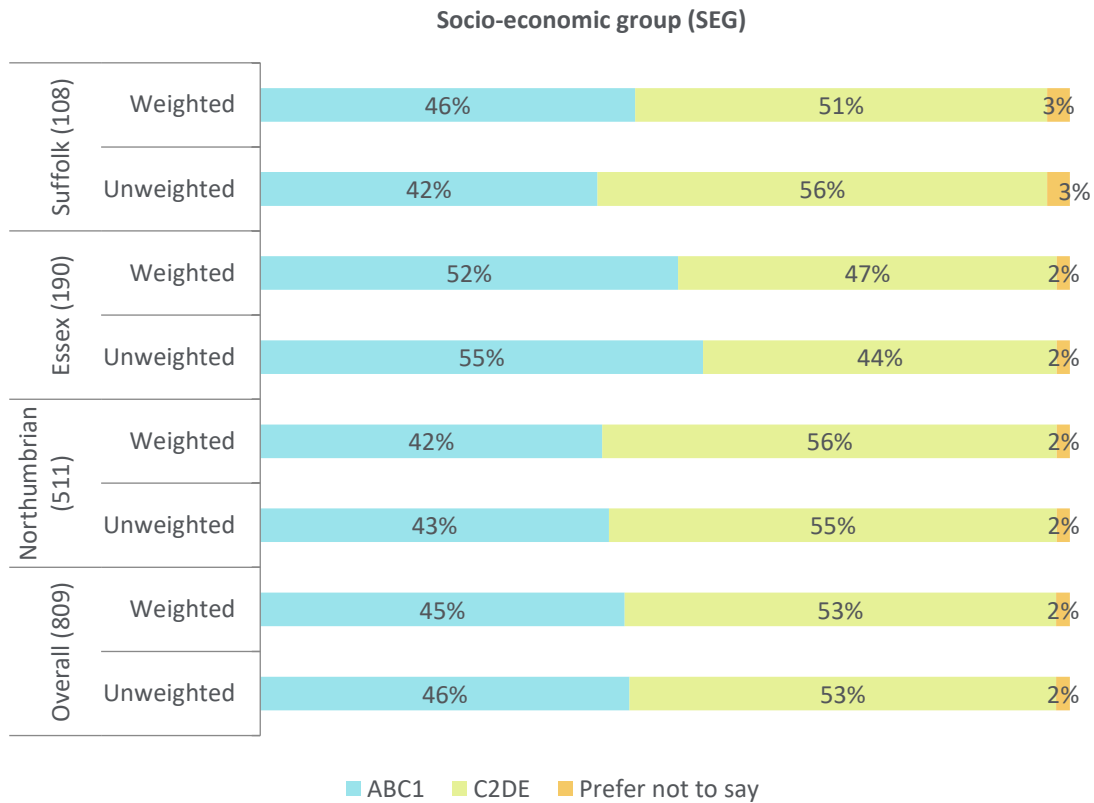
Similarly, there was a mix of gender representation across all operating areas, where weighted and unweighted proportions were consistent. One respondent identified as transgender, and a small proportion preferred not to say.



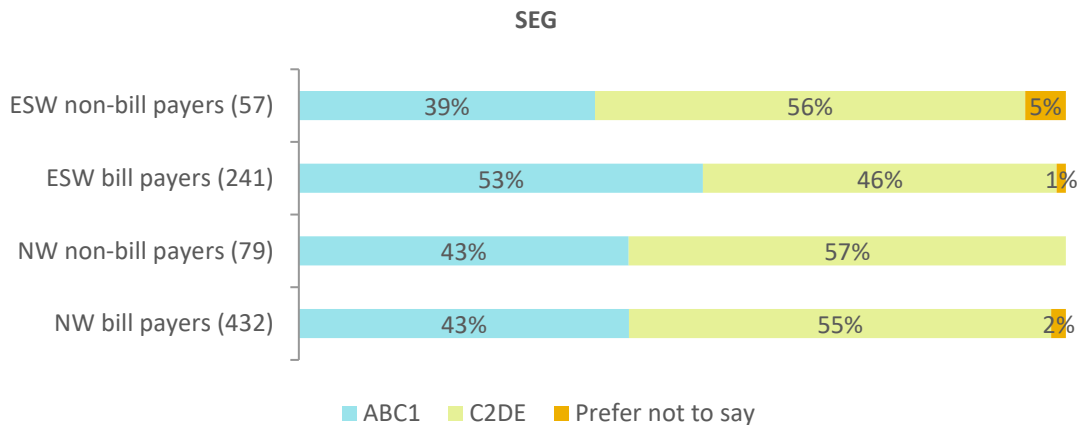
Representation of females was highest amongst non-bill payers in the ESW operating area (61%). Amongst the current bill payer segments, there was also slightly higher female representation versus male (both 54% female).



As outlined in the 'notes on analysis' section, slight weighting was applied to the sample to bring the weighted sample in line with representative quotas for socio-economic groups. Differences can therefore be seen between weighted and unweighted samples here across all segments, though differences are slight.

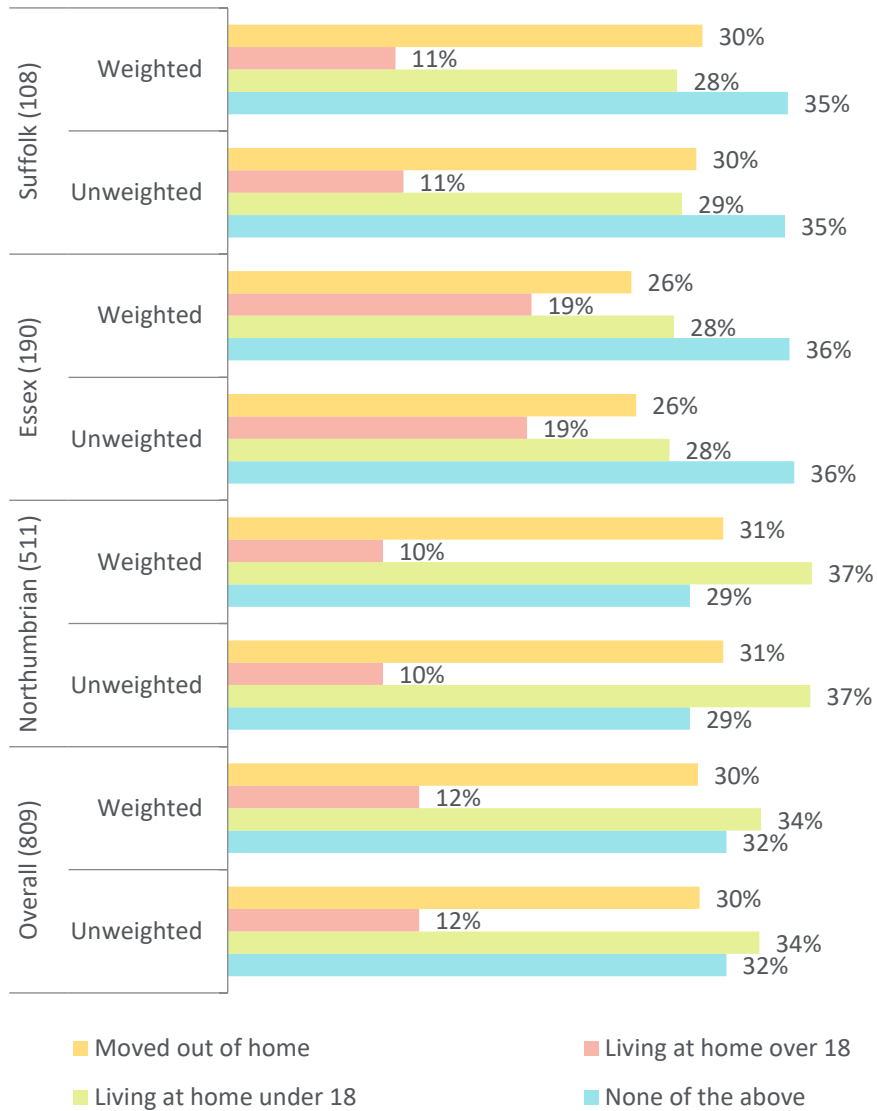


Bill payers in the ESW operating area were more likely to be part of higher socio-economic groups ABC1 compared to customers in the North, aligned with local census proportions.

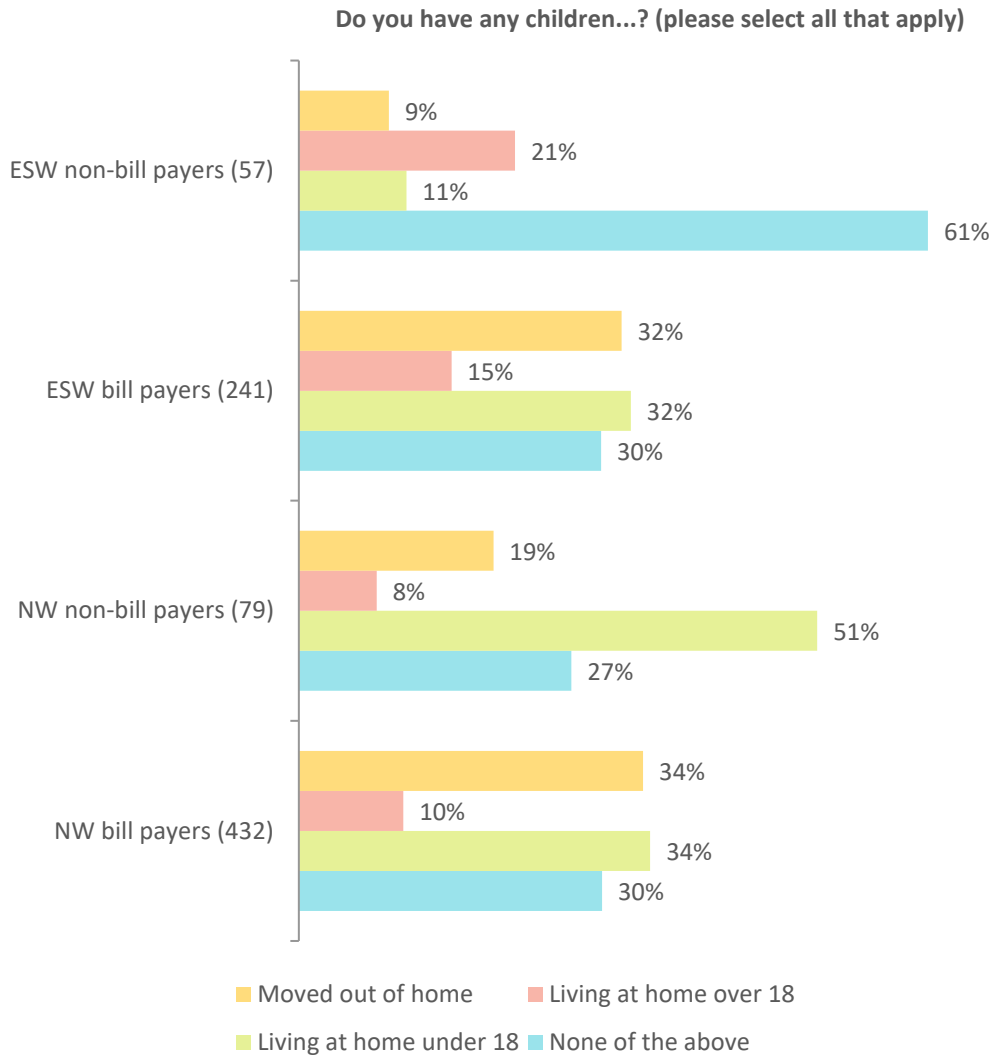


All respondents were asked whether they had children and whether any children were still living at home, to understand more about the life stage of participant. Overall, around a third (30%) of respondents were 'empty nesters', i.e. their children had moved out of home. In comparison, respondents in Essex and Suffolk regions were most likely to report 'none of the above', i.e. that they had no children. Around a third (34%) of the sample had children living at home who were under 18.

**Do you have any children...? (please select all that apply)**



A majority of non-bill payers in the ESW region reported 'none of the above' (61%) – suggesting that three in five non-bill payers did not have children at the time of participating. This could possibly be anticipated given the audience. Interestingly, in the NW region, half (51%) of non-bill payers reported having children under the age of 18 living at home. Life stage/living circumstances were fairly consistent between both bill payer groups, including a proportion who reported that they had children over the age of 18 living at home at the time of surveying (15% ESW, 10% NW).



## Phase 2

In total, 37 respondents attended across the nine focus groups, engaging varying demographic profiles. Across the groups, there was a mix of gender, life stage, rural/urban and age group. A summary of demographic profiles is shown in the table below.

Location	Attendees	Gender	Life stage	SEG	Age	Rural/Urban
Ashington	3	2M, 3F	Mixture	ABC1	35+	Urban
Berwick	4	2M, 3F	Empty nesters	ABC1	35+	Rural
Durham	6	1M, 5F	Young adults	ABC1	18-35	Urban
Alston	3	1M, 3F	Mixture	Mixture	35+	Rural
Seaham/Blackhall	4	3M, 1F	Mixture	Mixture	Mixture	Rural
Stockton/Billingham	3	3F	Mixture	Mixture	18-59	Urban
Chelmsford	5	3M, 2F	Mixture	ABC1	18-59	Mixture
Framlingham/Saxmundham	3	2M, 1F	Empty nesters	ABC1	35+	Rural
Hornchurch/Upminster	6	3M, 3F	Mixture	Mixture	Mixture	Urban

As C2DE socio-economic groups (SEG) were under-represented within the focus groups, we targeted this audience for five in-depth interviews after the groups were held. A summary of interview profiles is shown in the table below.

Location	Gender	SEG	Age	Rural/Urban
Seaham and Blackhall	F	C2DE	18 - 35	Rural
Framlingham/Saxmundham	M	C2DE	35 - 59	Rural
Hornchurch/ Upminster	F	C2DE	18 - 35	Urban
Hornchurch/Upminster	F	C2DE	35-59	Urban
Ashington	M	C2DE	18-35	Urban





# Results

An in-depth review of the findings of the research.

# Results

The following pages detail the findings of both the quantitative and qualitative phases of research. Which phase of research (phase 1 – quantitative, phase 2 – qualitative) insights developed from is explained throughout.

## Concerns and attitudes

All survey respondents were first asked about their levels of concern about a range of factors, to understand more about their personal outlook and factors which could impact their views on water environments and their willingness to pay more on their bill. This included the impact of the COVID-19 pandemic which was ongoing at the time of surveying and analysis. Please keep in mind the timing and context of surveying when considering these results.

Results are outlined in the following pages.

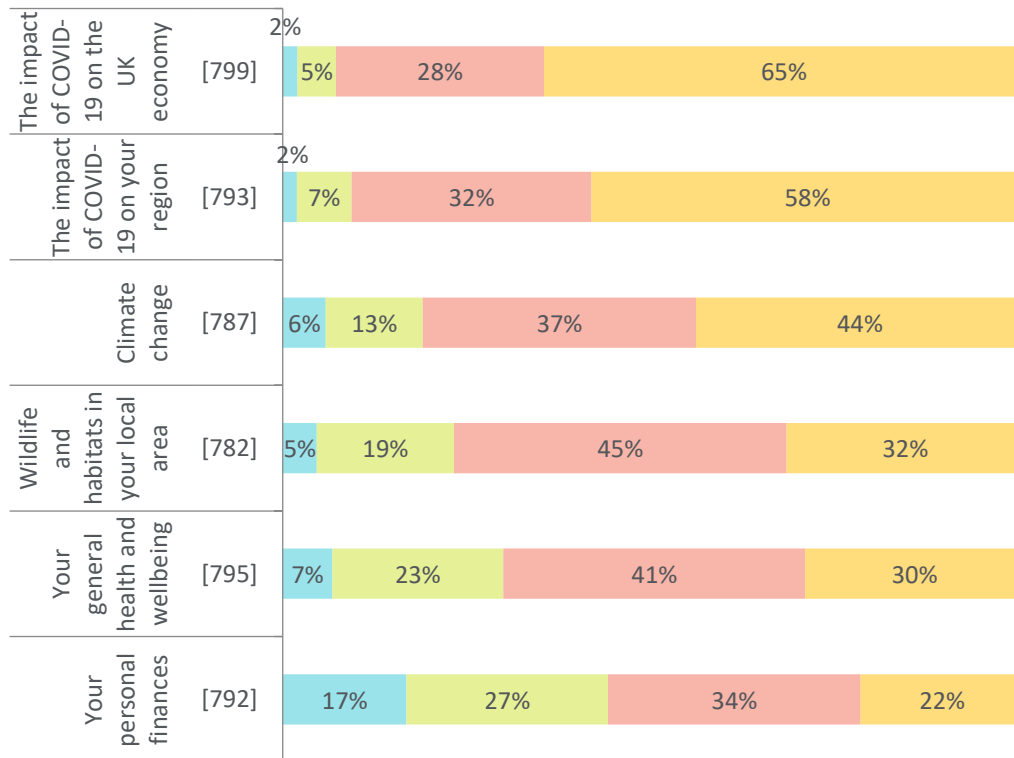


## Participant concerns compared

The following chart shows overall levels of concern for the aspects presented, ordered from greatest to lowest levels of concern. This shows that concern about the impact of COVID-19 on both the UK economy and their region were the greatest concerns for surveyed participants, with 65% and 58% of respondents respectively selecting they were very concerned about these. However, the area of least concern was participants' personal finances, with 17% stating they were 'not at all concerned' about them. Half (56%) of participants were either slightly (34%) or very (22%) concerned about their finances nonetheless. This is important to note when considering participants' willingness to pay more on their bills for outperformance against this PC.

Most participants were concerned about the environmental issues mentioned, with only 5% unconcerned about climate change and 7% unconcerned about wildlife and habitats in their local area.

How concerned are you, if at all, about...? [overall, weighted]



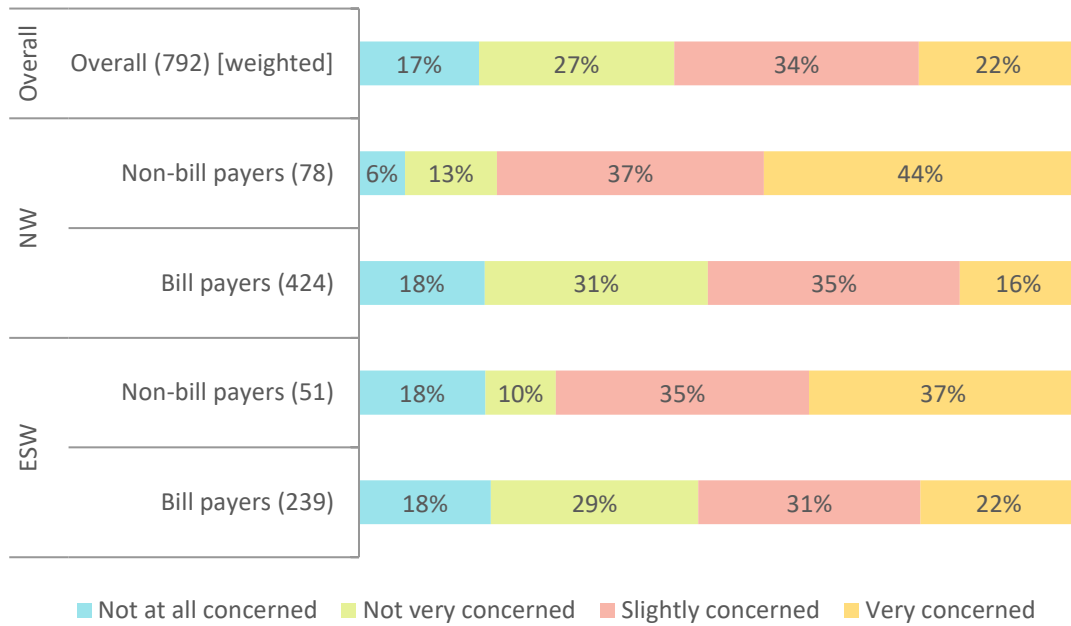
■ Not at all concerned ■ Not very concerned ■ Slightly concerned ■ Very concerned





Overall, more than half of respondents were concerned about their personal finances. Non-bill payers were notably most concerned about their personal finances (44% NW, 37% ESW). In addition, 18-29 year-olds were significantly more likely to be very concerned about this (29% amongst this age group compared to 14% amongst 50-69s and 6% amongst 70 and overs). When reviewing results by socio economic group, those in SEG C2DE were significantly more likely to stat that they were ‘very concerned’ about personal finances than those in SEG ABC1 (27%).

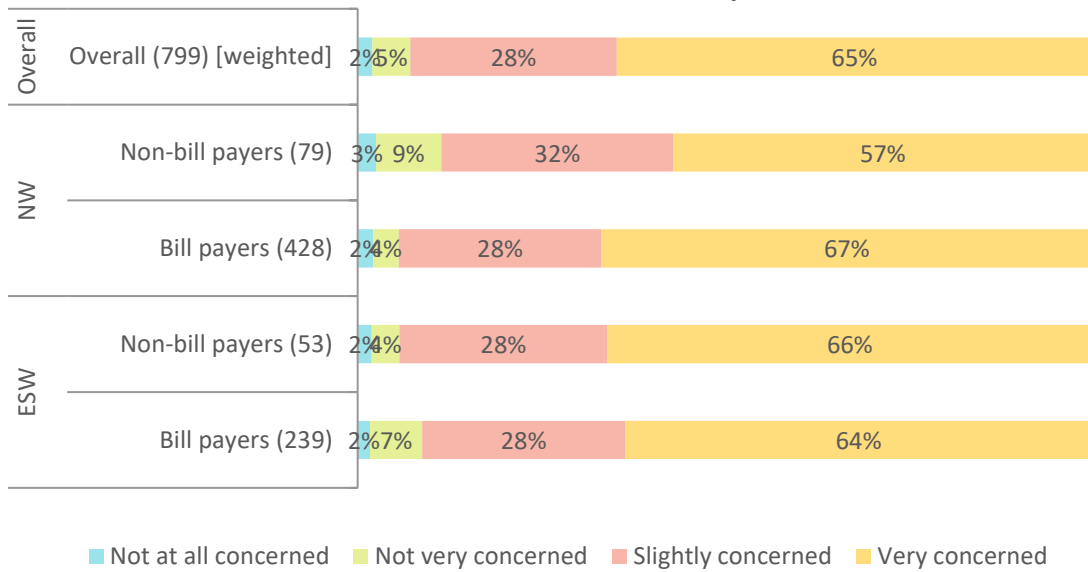
**How concerned are you, if at all, about...your personal finances?**



There was significant concern about the impact of COVID-19 on the UK economy amongst all groups who took part in the survey, with around two thirds of all respondents (65%) reporting that they were very concerned. Only seven per cent of respondents reported little or no concern about this impact.

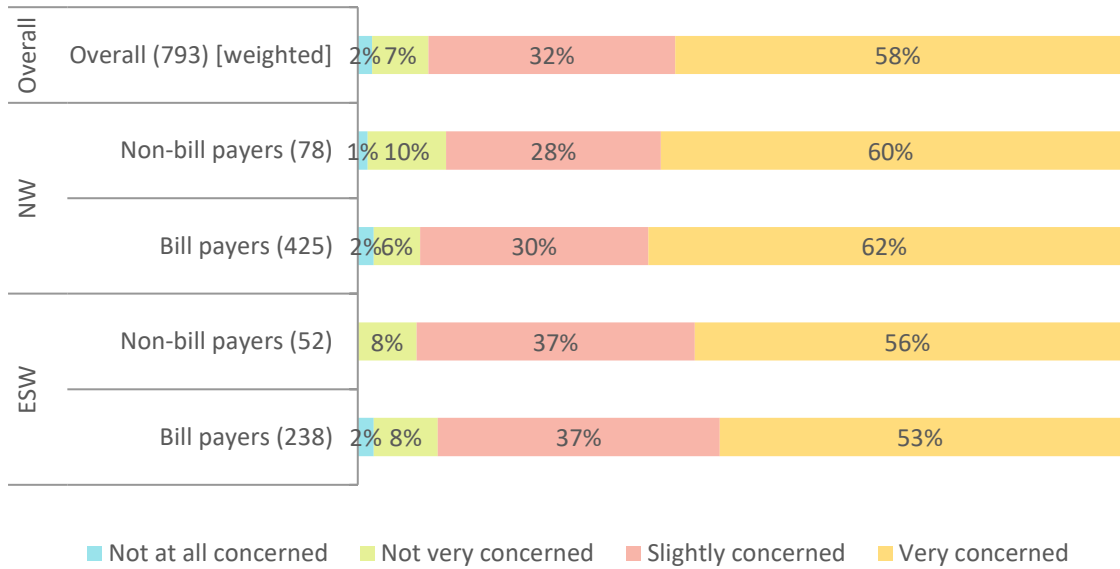
There was concern across the age groups engaged. However, those in the oldest two age groups were significantly more likely to be very concerned (74% of 50-69s and 76% of those aged 70+) than the two youngest age groups (60% of 30-49s and 54% of 18-29s).

**How concerned are you, if at all, about...the impact of COVID-19 on the UK economy?**



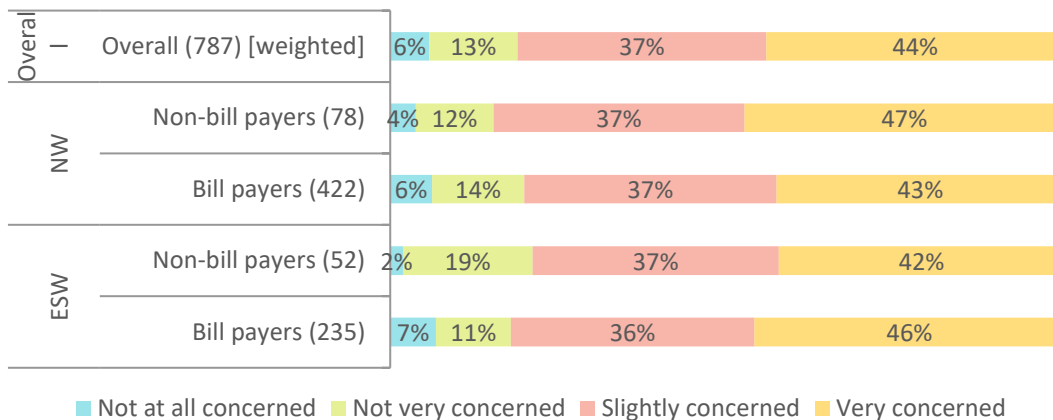
Similarly, more than half of survey respondents were very concerned about the impact of COVID-19 on their region, and a further third were slightly concerned. Nine per cent were not at all or not very concerned. Concern was slightly higher amongst respondents in the NW operating area than in ESW, and again concern was higher amongst those in the older age groups.

**How concerned are you, if at all, about...the impact of COVID-19 on your region?**



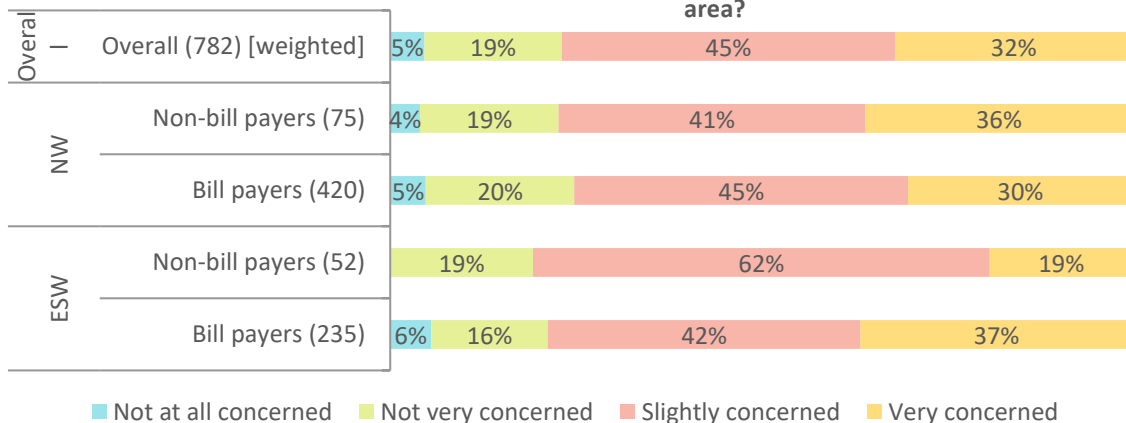
Although not as strong as concern about the impact of the pandemic, most survey respondents were slightly or very concerned about climate change. There was greater concern about climate change amongst non-bill payers in the North (84%) compared to the South (79%). However, concern was still high amongst both groups. Concern was reported across all age groups, but those aged 70 and over were slightly more likely to report that they were not at all concerned about climate change (11%) than other age groups, particularly 30-49s (4%).

**How concerned are you, if at all, about...climate change?**



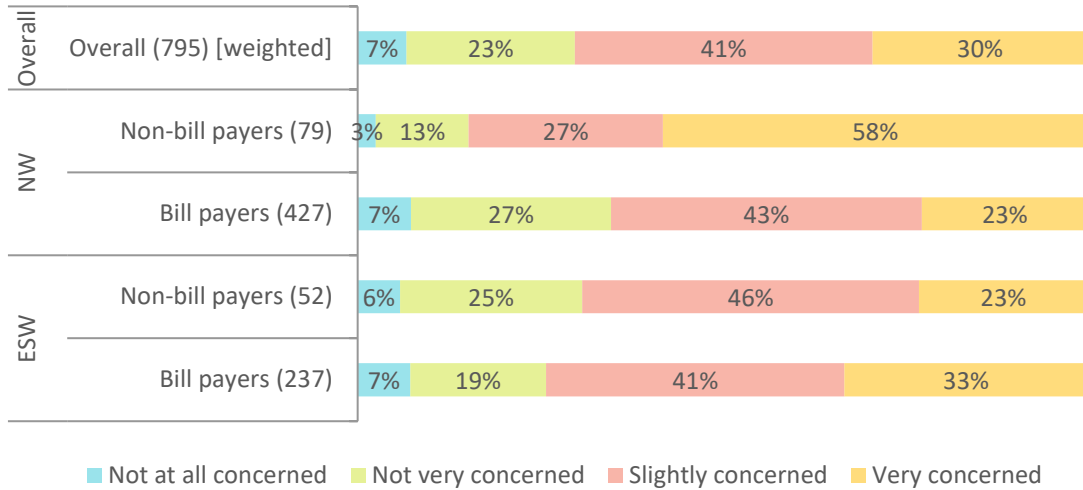
Survey respondents most commonly expressed slight concern (45%) about wildlife and habitats in their local area, and a third (32%) were very concerned. There were no statistically significant differences in results between age groups for this area of concern, however those SEG C2DE were significantly more likely to state that they were ‘very concerned’ (35%) about wildlife and habitats in their local area than those in SEG ABC1 (27%).

**How concerned are you, if at all, about...wildlife and habitats in your local area?**



Similarly, survey respondents most commonly expressed slight concern about their general health and wellbeing (41%), although 30% were very concerned. Interestingly, given the ongoing pandemic at the time of surveying, which was agreed by medical professionals to be the greatest risk to older age categories, it was the 30-49 year-olds surveyed who were most likely to report they were very concerned about their general health and wellbeing (35%).

**How concerned are you, if at all, about...your general health and wellbeing?**



## Introduction to NW/ESW

Both survey and focus group/in-depth respondents were provided with background information about NW/ESW and the services provided to ensure that they understood the organisation before answering any questions or sharing their views in the focus groups.

All respondents were also provided with a map which highlighted the areas in which NW/ESW operates. This information was displayed on screen for those completing the survey online. For those completing the survey by telephone or taking part in focus groups, information was provided within pre-reading information sent in advance.

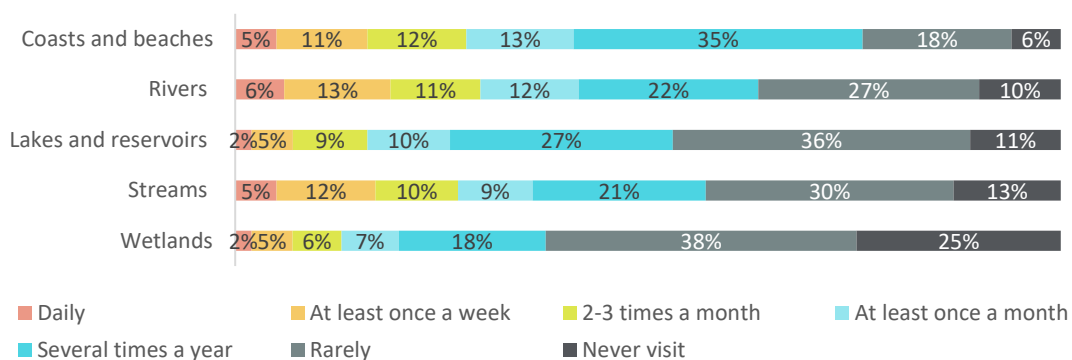
In each focus group and in-depth interview, the facilitator recapped the main points from this information, and respondents were given the opportunity to ask questions of the Explain facilitator or NWG representatives present to clarify any of the background information that had been provided. No respondents had further questions to ask at this stage.

## Use of Water Environments

Following their introduction to NW/ESW as an organisation, survey respondents were introduced to the concept of water environments (areas alongside rivers and streams, lakes and reservoirs, wetlands, coasts and beaches) and were asked how often they visited each type of water environment.

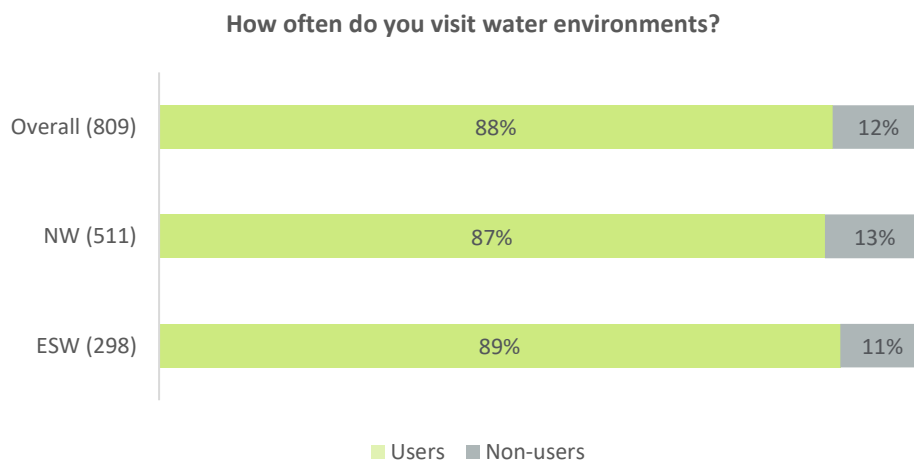
Overall, rivers, streams, coasts and beaches were the habitats most frequently visited. 42% said that they visited rivers at least once a month or more, 41% said that they visited coasts and beaches at least once a month or more and 36% said that they visit streams at least once a month or more. A lower percentage of respondents visited lakes and reservoirs (26%) or wetlands (20%) at least once a month or more.

**How often do you visit water environments? Overall [weighted] (781-793)**



Visiting patterns were similar between NW and ESW survey participants across all water environments (except canals), though ESW respondents were more likely to visit lakes and reservoirs more frequently (21% of ESW respondents visited lakes or reservoirs between daily and 2 to 3 times a month, compared to 13% of NW respondents). NW respondents were slightly more likely to visit coasts and beaches more frequently (13% visited at least once a week compared to 10% amongst ESW respondents). Please note, only ESW respondents were asked about canals, which were not considered relevant to the NW audience.

A small proportion of survey respondents either rarely or never visited any of the water environments listed, and therefore can be considered non-users. Overall, 12% of those surveyed rarely or never visited these types of sites, which was consistent between NW (13%) and ESW (11%). Note that users are categorised as those who visited water environments between daily and several times a year.



Looking at the results to this question by age group (full results in the graph overleaf), the findings suggest that younger age groups (18-29 and 30-49) are more likely to visit water environments more frequently than the 50-69 and 70+ age groups. This applies across all types of environments, but is less pronounced for coasts and beaches, which are commonly visited across all age groups. Wetlands were the environments least likely to be visited across all age groups. Some interesting differences between segments included:

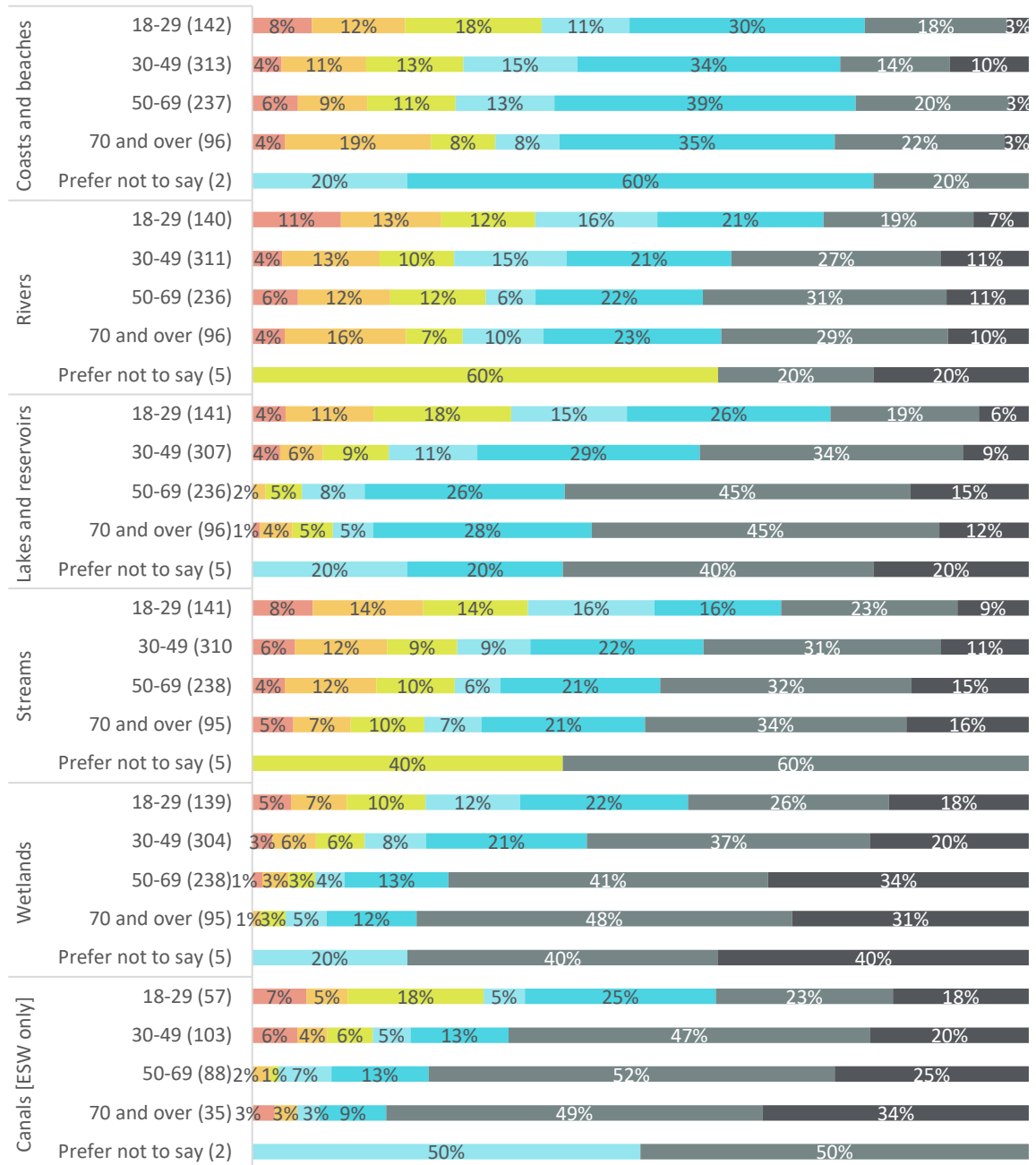
- 74% of 18-29 year-olds overall reported visiting lakes or reservoirs at least several times a year, compared to 41% of 50-69 year-olds.
- 11% of 18-29-year-olds reported visiting rivers daily, compared to 4-6% of the other age groups.
- Amongst NW respondents, those aged 70 and over were significantly more likely to never visit streams (18%) than younger age groups (5% of 18-29 year-olds never visited stream sites, nor did 11% of 30-49 year-olds).



- When reviewing results by SEG, those in SEG ABC1 were significantly more likely to visit both rivers (17%) and streams (15%) at least once a week, than those in groups C2DE (9% and 9% respectively).

There were no significant differences by bill paying and region, however a full breakdown of responses by these aspects can be found in Appendix 6.

**How often do you visit water environments? [unweighted, by age group]**



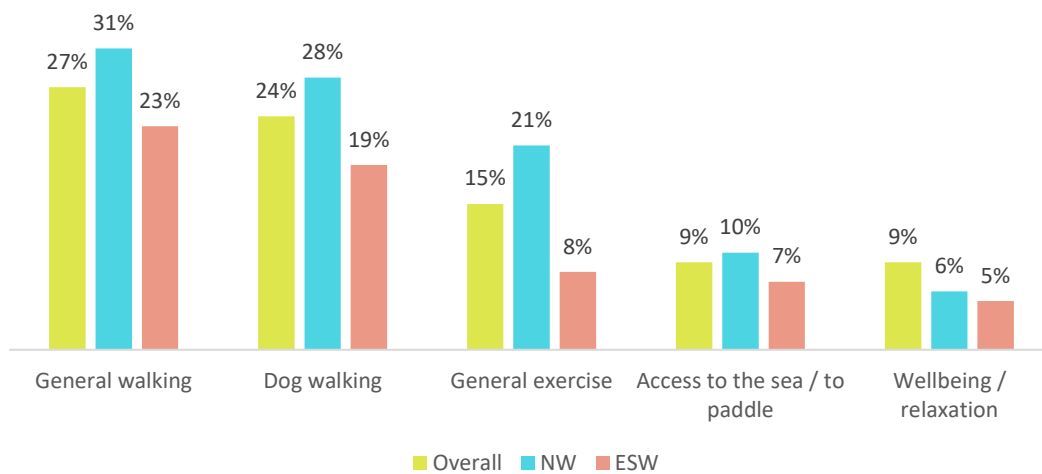
■ Daily  
■ At least once a week  
■ 2 to 3 times a month  
■ At least once a month  
■ Several times a year  
■ Rarely  
■ Never visit





In an open question (although note that examples were shared within the question wording), all respondents were asked their typical purpose(s) for visiting water environments. Overall, the most popular reason that respondents visited water environments was for walking, whether this be general (27%) or specifically for dog walking (24%).

**When you visit water environments, what is typically the purpose/s of your visit? (e.g. dog walk, paddling with children, accessing the sea, exercise, water sports, etc).**



Among NW respondents, 21% visited water environments for general exercise, and 10% to access/paddle in the sea. Eight per cent also said they typically do so to spend time with family or friends, and 5% used them for water sports.

- *“Just walking nearby the river (Tees) and sometimes to see if we spot the seals. Going to the beach either for a day out or for a walk along the beach.” (NW bill payer)*
- *“Walking the dog and getting out in the fresh air, either in the local woods with stream, bigger woods with a river (Team) nearby public park with dog area and river (Wear) or one of the nearby beaches, or Derwent reservoir.” (NW bill payer)*
- *“General relaxation and walking along the beach shore at Tynemouth, occasional paddling.” (NW bill payer)*
- *“Exercise with an emphasis on a lovely environment.” (NW non-bill payer)*
- *“Dog walk - beaches, rivers.” (NW non-bill payer)*



ESW respondents typically referred to walking along riverbanks, with some also stating that they go for walks along nearby canals. Among ESW respondents, 8% visited water environments for general exercise, 7% to access the sea/ paddle and 5% for wellbeing/relaxation purposes, with some stating that they found being near water to be more relaxing and peaceful than other outdoor environments - 5% visited to enjoy their local environment.

- *“Walk on canals etc. because it’s a nice walk - great to see nature.” (ESW bill payer)*
- *“Dog walking, spending time with children and grandchildren, walking clearing the mind...” (ESW bill payer)*
- *“Weekend walks for exercise and/or relaxation - change of scenery.” (ESW non-bill payer)*
- *“Relaxation and peaceful environment by the water, whether a seaside or river.” (ESW bill payer)*
- *“Weekend outing to get away from the stresses of daily life.” (ESW non-bill payer).*

Similarly, focus group and in-depth respondents were asked what their favourite ways in which to use water environments were (during introductions). Reflecting the thoughts shared by survey respondents, the ways group and in-depth respondents used water environments included walking, exercise, relaxation and for socialising with friends/family members:

- *“We’ve recently got into paddle boarding. We’ve lived up here for just about eighteen months. Obviously, we haven’t done much recently because of everything. My wife also likes to use the coast to run, she’s a long-distance runner, and we use the beach a lot for her running.” (Berwick)*
- *“I love walking my dogs along the river or just taking them into all of the fields that are around here.” (Durham)*
- *“In terms of leisure, the most popular in the family is canal holidays. I am quite keen on walking along rivers and lakes. There is something about water isn’t there? You are drawn to water.” (Hornchurch/Upminster)*
- *“Basically, I enjoy walking. I have two babies, twins and most of the time, especially in the summertime we just walk. We live in Snape and we have this other river which is Snape Maltings. Around that area we enjoy walking through the nature reserve which we have around there as well. We go quite often to Aldeburgh and Thorpeness so we walk through that way as well, we go to Orford” (Framlingham in-depth)*



All survey respondents were then asked about the location of the last water environment they visited, what they enjoyed most about their last visit and what could have been improved. Please note, each question required an open response.

Overall, 451 respondents (56%) said that there was nothing that could have been improved about the last water environment they visited. Across the overall survey sample, aspects respondents enjoyed were fresh air, views/attractiveness, tranquillity, and being beside water and wildlife. Aspects that survey respondents felt could be improved included better water quality, better accessibility, better/more facilities and less litter/waste.

Themes by region are provided on the following pages, and full raw data has also been provided separately for these questions to allow for review of responses at a more granular level.



A summary of responses provided for the top five most frequently listed locations by NW surveyed customers can be found below.

### Newcastle (36)

- Respondents enjoyed the fresh air (6), views (4) and being beside/watching the water for relaxation (4) in these locations.
- 20 respondents stated nothing could have been improved about their experience.
- Improvements suggested were more bins/less litter (4) and improving pathways (2).

### Sunderland (24)

- 11 respondents stated that they did not enjoy anything about their last visit here.
- Five respondents enjoyed the fresh air and three respondents enjoyed the views.
- 14 respondents stated that nothing could have been improved about their experience.
- Improvements suggested were improving facilities (3), improving information signage (3) and better access/parking (2).

### Derwent (21)

- Respondents enjoyed the views/attractiveness (6) and tranquility/quietness (5) in this area.
- 17 respondents stated that nothing could have been improved about their experience.
- Two suggestions were made for improvements - more dog waste bins, and the provision of a circular route around the entirety of Derwent reservoir.

### Durham (20)

- Respondents enjoyed being beside/watching the water for relaxation (5) and the views/attractiveness of the area (4).
- 11 respondents stated that nothing could have been improved about their experience.
- Improvements suggested included improving water quality (2), improving pathways around the river (1) and more information/signage (1).

### Gateshead (19)

- Nine respondents stated that they did not enjoy anything about the experience of visiting these water environments.
- Five respondents stated that nothing could have been improved about their experience..
- Improvements suggested included improving facilities (3), improving pathways (3), improving water quality (2) and better parking facilities (2).



A summary of responses provided for the top five most frequently listed locations by ESW survey respondents can be found below:

### Southend (44)

- Respondents enjoyed being by the sea for relaxation (14), views (6) and fresh air (6) in these areas.
- 17 respondents stated that no improvements could be made to improve their experience.
- Improvements included improving the overall cleanliness/ less litter (10) and better parking (2).

### Southwold (21)

- Respondents enjoyed the views/landscape (4), the facilities/things to do (4) and the wildlife (2) in these areas.
- Nine respondents stated that no improvements that could be made to improve their experience.
- Improvements suggested included less litter (4) and having more facilities/things to do (3).

### Hanningfield (14)

- Respondents enjoyed the wildlife (4) and the views/attractiveness of the area (3).
- 12 respondents said that no improvements could be made to improve their experience.
- Two suggestions were made for improvements - more play areas (1) and improvements to parking (1).

### Great Yarmouth (13)

- Respondents enjoyed the wildlife (3) and generally being by the sea for relaxation (3) in these areas.
- Six respondents stated that no improvements that could be made to improve their experience.
- The main improvement suggested for these areas was to have less litter (4).

### Chelmsford (11)

- Respondents enjoyed the wildlife/nature (4) and fresh air (2) in these areas.
- Five respondents stated that no improvements that could be made to improve their experience.
- Improvements included more places to sit (1), less litter (1) and better marked routes (1).

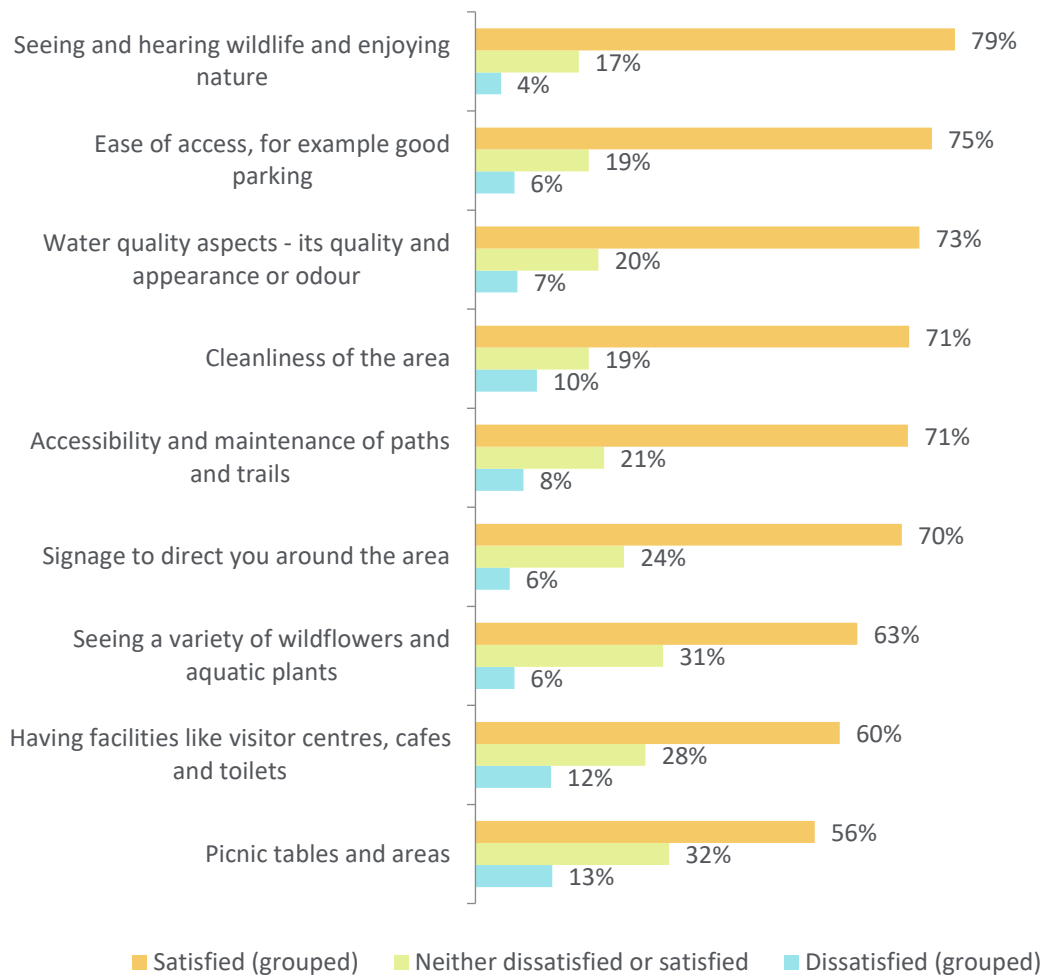


All survey respondents were asked to think about the last water environment they'd visited and to rate how satisfied they were with a range of aspects. Overall results can be found in the graph below, with satisfaction or dissatisfaction grouped (i.e. 'very dissatisfied' and 'dissatisfied' reported as 'dissatisfied' and the same for 'satisfied'). Please note this was a single coded closed question and thus respondents were asked to rate their satisfaction from a pre-set list of water environment aspects.

Overall, more than half (56%) of respondents were either satisfied or very satisfied with all the aspects presented, in particular with 'seeing and hearing wildlife and enjoying nature' and 'ease of access'.

Dissatisfaction was fairly low. The aspects which saw highest levels of dissatisfaction were 'picnic tables and areas' (13% grouped dissatisfaction, of which 3% were 'very dissatisfied') and 'having facilities like visitor centres, cafes and toilets' (12% grouped dissatisfaction, of which 2% were 'very dissatisfied').

**Thinking about the last water environment that you visited, how would you rate your satisfaction with the following?  
 Overall [weighted] (732 - 781)**



A full breakdown of responses by bill payer status and area can be found in Appendix 7.



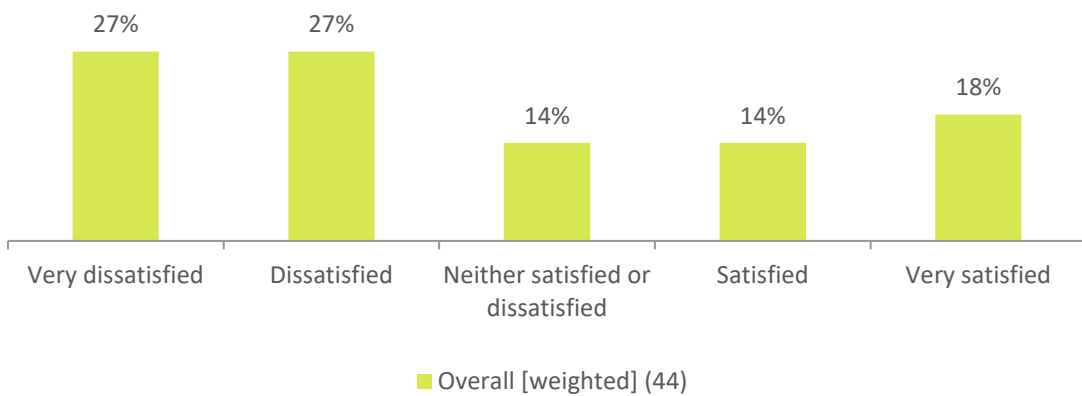
All survey respondents were asked whether there were any other aspects not covered that they would like to comment on in terms of their satisfaction, and what this aspect was. Overall, 45 respondents wished to comment on another aspect (NW bill payers – 26, ESW bill payers – 15, NW non-bill payers – 2, ESW non-bill payers – 2).

Those who wished to comment on an additional aspect were asked which aspect they wanted to comment on. The main responses were:

- Accessibility (NW – 6)
- Dog fouling (NW – 4)
- Cleanliness of facilities (ESW – 3)
- Overall cleanliness (ESW – 2)

Those who wished to comment on an additional aspect were then asked how they would rate their satisfaction with these. Overall, just over half (54%) of respondents were dissatisfied or very dissatisfied with the additional aspect they'd listed. Dissatisfaction is likely to have driven them to remember and mention these aspects of their experience.

**[OTHER]: How would you rate that aspect?**



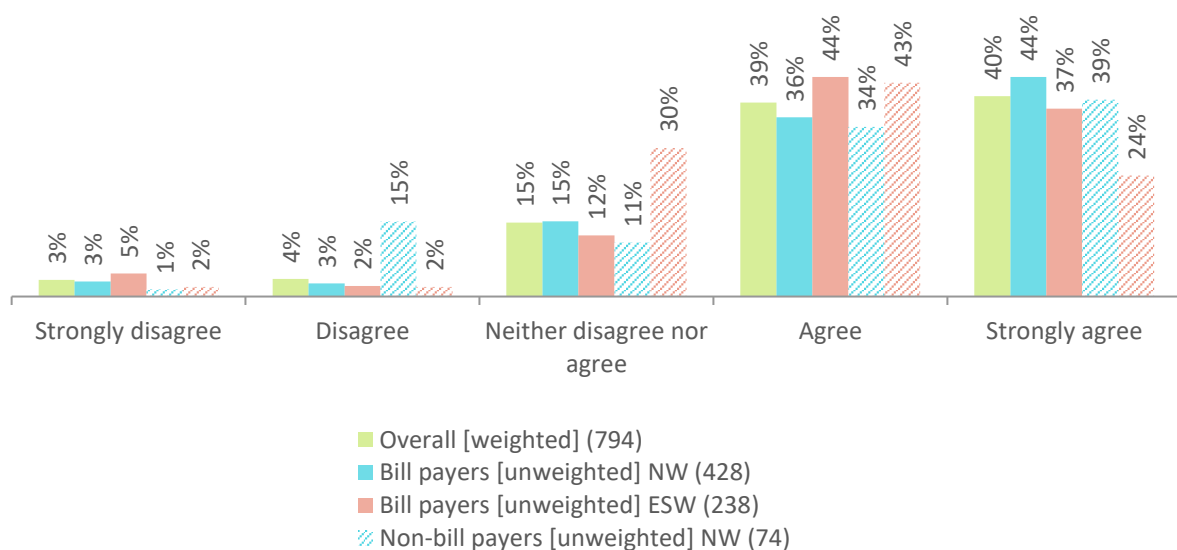
## Support for the programme and preferred focus

At this stage, all survey respondents were presented with a short video about the Water Environment Improvements programme, along with some examples of what this could involve. Please note, those who completed the survey via telephone were instructed to either watch this video before taking part in the survey (these respondents were sent the videos via email prior to taking part) or were sent a transcript of the video (via post) ahead of taking part, to insure inclusivity for non-digital participants.

All survey respondents were asked to what extent they agreed with the statement *"I value NW/ESW making investments to improve water environments for the benefit of customers."* Please note this was a single coded closed question and thus respondents could choose one response from a list of presented options.

The majority of survey respondents agreed (agree or strongly agree) with this statement (79%), with agreement higher among ESW bill payers (81%) than among ESW non-bill payers (67%). Older age groups were more likely to strongly agree that they valued investment for improvements (e.g. 53% of those aged 70 and over), while 18-29s were more likely to 'neither disagree or agree' than others (19%). This could suggest that younger people will need greater engagement and education about the programme or local projects to ensure the buy-in of all age groups amongst local populations. In addition, when reviewing results by SEG, those in groups ABC1 were significantly more likely to 'strongly agree' with this statement (44%) than those in groups C2DE (37%).

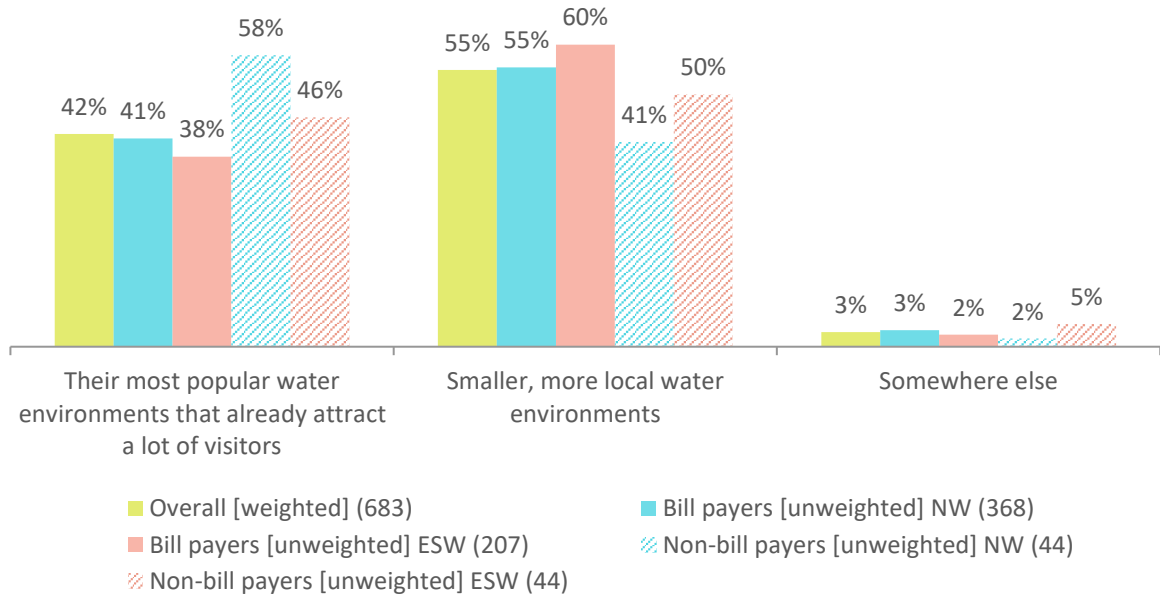
**To what extent do you agree with the statement "I value NW/ESW making investments to improve water environments for the benefit of customers"?**





All survey respondents were asked where they would rather NW/ESW focus their investments if they had to choose where investment is targeted. Please note this was a single coded question, where respondents had to select a response from the presented limited options. Views were split, with just over half (55%) saying that they would prefer NW/ESW to focus their investments on smaller, more local water environments. However, more NW non-bill payers preferred the company to focus investments on their most popular water environments that already attract a lot of visitors (58%).

**If you had to choose where this investment is targeted, would you rather they focus their investments on...?**



Those respondents who answered 'somewhere else' were asked where this would be in an open question. Responses included both areas (NW – 2, ESW - 1), the areas that need it most (NW – 1, ESW - 1) and areas with poorer water quality/polluted water (NW – 1, ESW - 1).



All survey respondents were then asked why they voted the way that they did in an open question. Themes identified among those who voted for 'smaller, more local water environments' were:



- *"Local places need more help with improvements, like a river that is filthy - water needs to be cleaner." (NW bill payer)*
- *"I feel like local places get overlooked. I am disabled so it's harder to get to bigger water environments, so more money put into ones at home to make them more accessible would be great." (NW bill payer)*
- *"Smaller environments are often neglected and if biodiversity is encouraged in these areas then it's money well spent." (NW bill payer)*
- *"I feel these places sometimes get left out because they don't attract lots of visitors. Also feel it's important to keep quality high for wildlife." (ESW bill payer)*
- *"By improving less popular areas, more people will visit them in the future." (ESW bill payer)*
- *"Areas need all the help and support they can get to improve and clean up waterways. Stop pollution and enhance the environment." (ESW bill payer)*
- *"They should give better access to smaller areas, with some facilities to make visiting easier." (ESW bill payer)*



Themes identified among survey respondents who voted for ‘their most popular water environments that already attract lots of visitors’ were:



- *“Because it will help keep these places available for people to visit long into the future and create jobs for local people to look after the areas and in the cafes.” (NW bill payer)*
- *“Visitors attract business, putting more money in to local economy.” (NW bill payer)*
- *“Ideally it would be nice to do both but focusing on popular areas will benefit more people.” (NW bill payer)*
- *“If they are busier areas already, then they most likely need a bit more attention in terms of upkeep.” (ESW bill payer)*
- *“There is a really large amount of people who will visit somewhere if they think it’ll be a good experience, and this would be a great opportunity to get more funding. Even if you opened cafes and restaurants near the place, people would go there and want to eat, and you could get funding from that. Also, holiday makers will usually over-buy, which will mean more money is being given to help support causes such as this one.” (ESW non-bill payer)*
- *“I think popular environments are visited by different cultural people with more expectations but also with bad habits, and for that is needed improvement. In smaller environments, I have the feeling people are more conscientious. However, some improvements in partnership with small businesses can be done.” (ESW bill payer)*
- *“So that more people benefit from the improvements.” (ESW bill payer)*



## Types of improvements

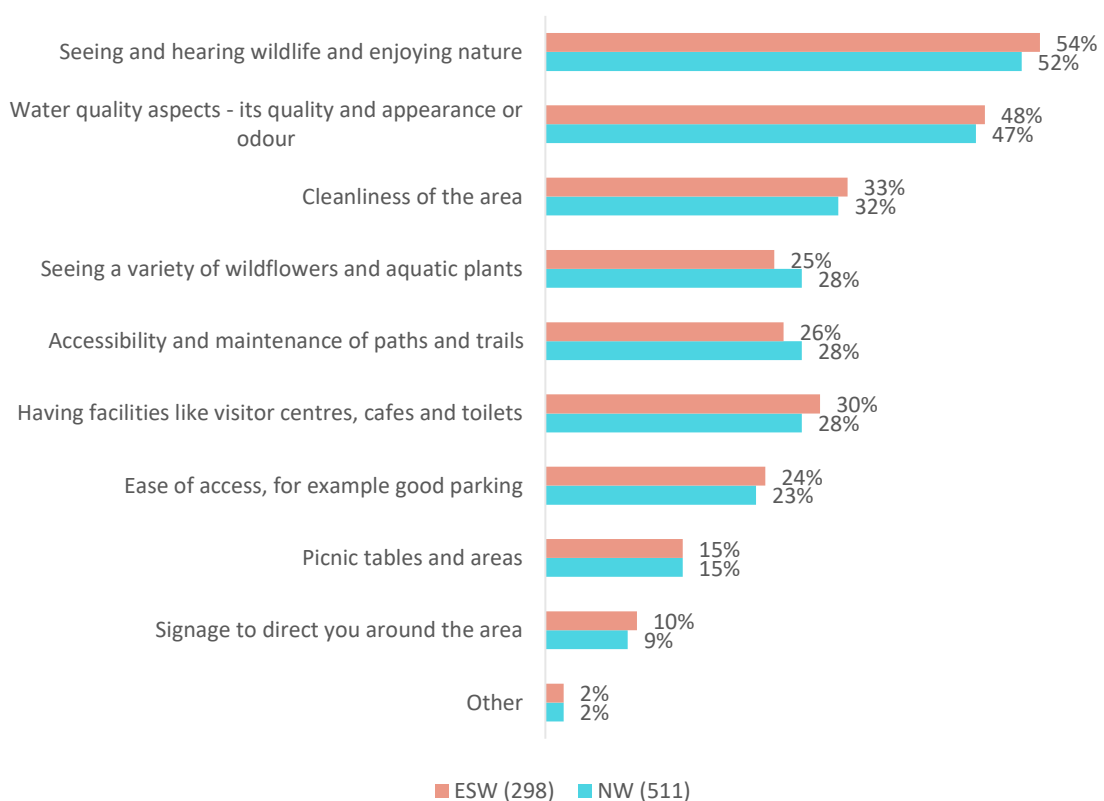
Survey respondents were then asked to think generally about different types of improvements to water environments that NW/ESW could make, and to pick out their top three priorities from a list.

The most commonly selected priorities were ‘seeing and hearing wildlife and enjoying nature’ (53%) and ‘water quality aspects – it’s quality and appearance or odour’ (47%). These findings are interesting because they contrast with previous findings that satisfaction levels with both aspects were amongst the highest, when thinking about the last water environment respondents visited.

Aspects were prioritised similarly when comparing NW and ESW audiences, although ESW respondents prioritised seeing a variety of wildflowers and aquatic plants slightly higher than cleanliness (33% and 30% respectively). Signage was least important in both regions.

Additionally, priorities identified by survey respondents across both areas broadly aligned with those mentioned by respondents in the focus groups. Water quality, cleanliness, accessibility and being able to see and hear wildlife were their main expectations for local water environments.

**Thinking generally about the different types of improvements to water environments that ESW could make, which of the following would be your top priorities? (Please pick a maximum of 3)**



Other responses included providing more bins (NW - 2) and general repairs and maintenance (NW – 2, ESW - 1).

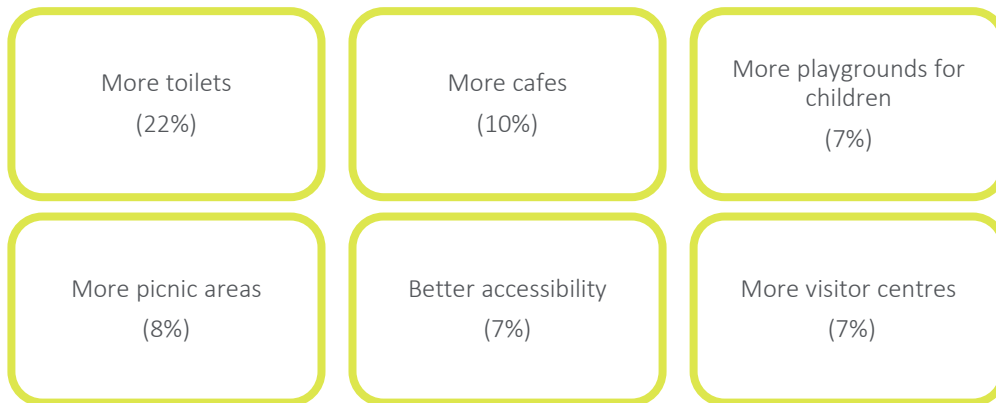
Accessibility and maintenance of paths and trails was significantly more likely to be a priority for older respondents (35% amongst 50-69s) than younger people (20% amongst 18-29 year-olds). In contrast, 18-29 year-olds were most likely to consider signage a priority (15%, compared to 6% for 50-69 year-olds).



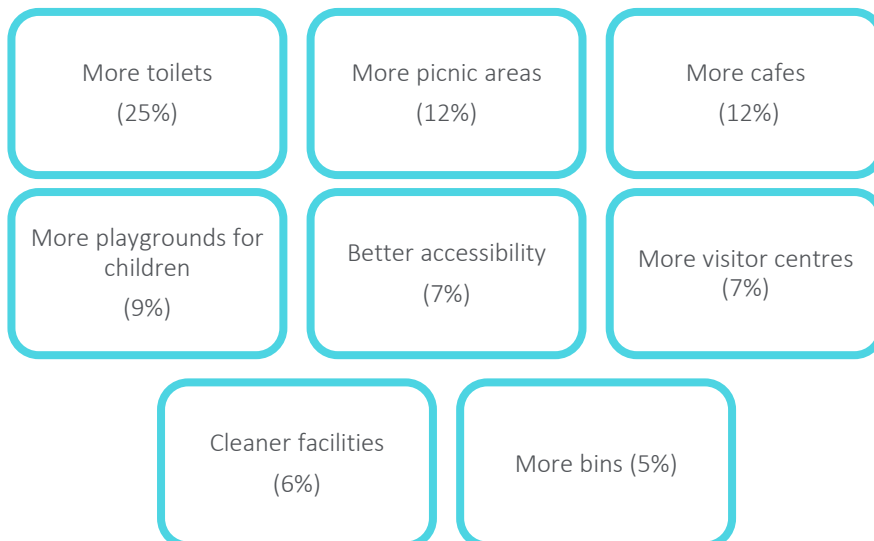
## Access improvements

At this stage, all survey respondents were asked to think about water environments in the region generally.

Respondents were first asked to think in more detail about **access and recreational facilities** and to list in an open response the types of improvements they would most like to see in water environments they visit. Themes included:



Themes amongst NW respondents were:

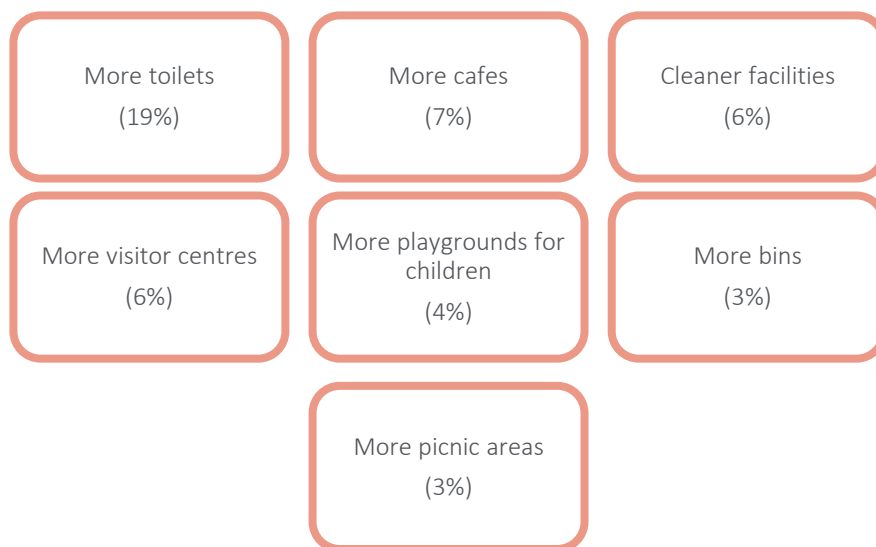


- *“Clean toilets and cafes and seating, it’s not great visiting a place with no café seating or toilets.” (NW bill payer)*
- *“Visitor centres with clean toilets are so important as a family with small children.” (NW bill payer)*



- *“Cafes are a must really, people can then spend a full day and be able to get refreshments on-site.” (NW bill payer)*
- *“Access, particularly good access for people with disabilities.” (NW bill payer)*
- *“Certainly, toilets and picnic areas so that you know you can bring a picnic and use the facilities. I personally don’t visit visitor centres as they get so busy in the school holidays, but I understand families would benefit.” (NW bill payer)*

Themes among ESW respondents were similar and included:



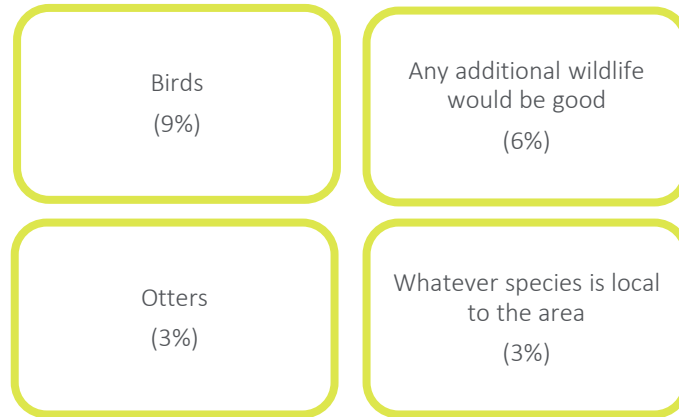
- *“Visitor centres with a cafe and toilets allow more people to enjoy visiting wildlife areas. Good parking is also vital. Separate bicycle tracks would make walking safer and more enjoyable. Dogs should always be kept on a lead in wildlife areas and plenty of bins for dog mess should be available.” (ESW bill payer)*
- *“More playgrounds for children and picnic areas.” (ESW bill payer)*
- *“I think visitor centres and toilets which would help people stay at these places for longer.” (ESW non-bill payer)*
- *“To encourage more people to visit the area, would benefit from information centres and facilities such as toilets and cafes that can be used by families and also to create employment and investment in the local area.” (ESW bill payer)*
- *“Access to public toilets is extremely important as there appears to be a lack of these facilities. Visitor centres would be good but not critical.” (ESW bill payer)*



## Wildlife improvements

Survey respondents were asked to think in more detail about **wildlife** and list any species or habitats that they would like to see more of at their local water environments. Please note this was an open question but was not required, and therefore base sizes were smaller.

Themes included:



Themes among NW respondents were:



- *"I love to see different types of birds and smaller animals such as rabbits and squirrels." (NW bill payer)*
- *"More diverse birds would be nice." (NW non-bill payer)*





- *“Otters would be perfect but also the reintroduction of beavers into select habitats.” (NW non-bill payer)*
- *“Nothing in particular - whatever is indigenous to the area.” (NW non-bill payer)*
- *“Red squirrels! They're so little in numbers in the North East now it would be lovely to see more of them.” (NW bill payer)*
- *“My daughter loves to look at the different kinds of fish within the water. More fish would be perfect.” (NW bill payer)*

Themes among ESW respondents were:



- *“A wider variety of birds around the water environment – could be done by including bird feeders.” (ESW non-bill payer)*
- *“I have never seen any fish or water wildlife in our local river - creatures may be there, but it must be struggling. I was told there are water voles. However, these must end up in the North Sea when the river floods.” (ESW bill payer)*
- *“Concentration of effort into indigenous species.” (ESW bill payer)*
- *“Any sort of wildlife with information on what we might see there.” (ESW bill payer)*
- *“Everything really because a diverse population is the healthiest.” (ESW non-bill payer)*

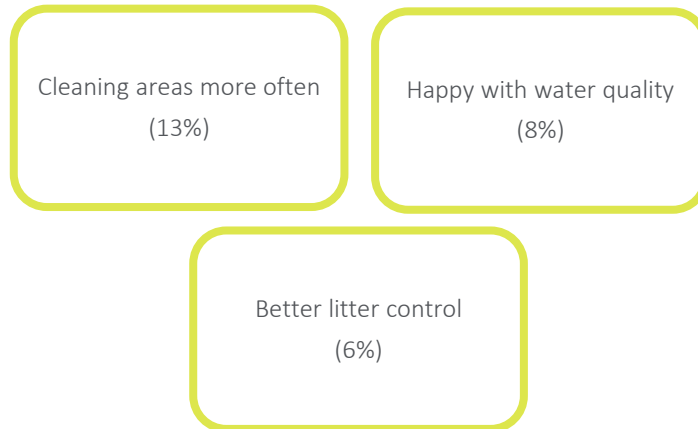


## Water quality improvements

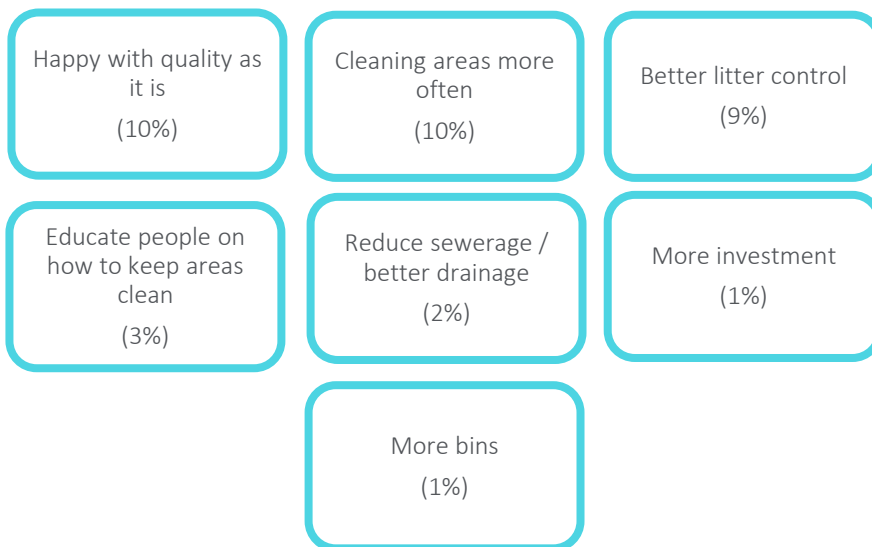
Survey respondents were then asked to think in more detail about **water quality** and whether there was anything that they felt NW/ESW could do to improve this at their local water environments.

Please note this was an open question but was not required, and therefore base sizes were smaller

Themes included:



Themes among NW respondents were:

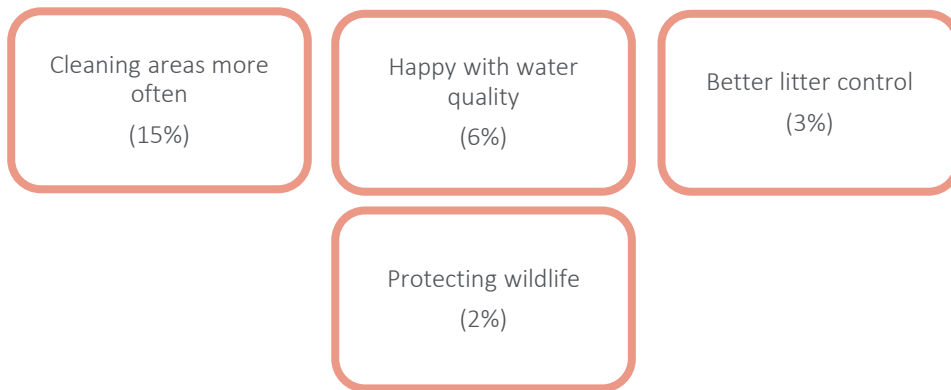


- *“Big fines for people causing litter or throwing litter into water.” (NW bill payer)*
- *“I think by providing litter bins it would reduce the amount of litter in the water.” (NW bill payer)*



- *“After watching the ad, I believe they are invested in litter removal from water sources - this would be something I'd like to see. Engaging schools and children into this campaign seems a wonderful idea.” (NW bill payer)*
- *“I always find the water quality very good at places like our reservoirs.” (NW non-bill payer)*
- *“Clearing away banks of the rivers/streams, of debris and making them more visible. Clearing away litter and making sure there are plenty of public bins to discourage littering the countryside. Making sure there is no unofficial dumping from nearby factories which may pollute the water.” (NW bill payer)*

Themes among ESW respondents were:



- *“Regularly check the water to monitor for pollution and other things that may harm the species inhabiting the water and surrounding area.” (ESW non-bill payer)*
- *“This company is doing a good job as it protects environment and accessibility to the recreation parks and also provides clean drinking water.” (ESW bill payer)*
- *“Encourage a variety of species to ensure they are not affecting habitats when working on improving the water quality.” (ESW non-bill payer)*
- *“Cleanliness is always paramount and conducive to repeat visits.” (ESW bill payer)*



## Initial hopes and expectations

On a similar line of thought, in the online focus groups and in-depth interviews, respondents were asked about their hopes and expectations for water environments in their local area, across the three areas: access, wildlife and water quality. Respondents were asked about their minimum expectations and whether there were any additional aspects that they would like to see as more of a 'nice to have'.

### Access expectations

In terms of accessibility, some aspects mentioned across groups and in in-depths were **car parking** and **accessible walkways**.

There was a minimum expectation to have **sufficient** parking facilities and to ensure that these are **safe**, for example ensuring members of the public aren't parking on narrow roads. Some respondents did, however, feel that parking was more of a 'nice to have' rather than a minimum expectation.

- *"If you wanted people to use the facility, however simple it was, you'd want at least two or three car parking spaces. Otherwise, you're on the road, and very often, that could be a very narrow country road, which would be quite dangerous. Personally, I wouldn't be inclined to go somewhere that hadn't got any parking at all." (Framlingham/Saxmundham)*
- *"In some busier ones like Paper Mill Lock there's a lot of parking issues at the moment. It's quite a narrow road. You've got lots of people parking dangerously. There's been quite a few near misses with accidents. I think that is quite important. And there's been a field that's being used for car parking now, but I think the charge is absolutely ridiculous because it's private." (Chelmsford)*
- *"I guess it depends what type of area but if it's somewhere you need to drive to, some sort of parking facility." (Chelmsford)*

In terms of walkways, again, one theme was a minimum expectation for pathways to be **safe**. In addition, some respondents mentioned that walkways should be **accessible for all, including those who need support with walking or have mobility concerns**.

- *"Mobility is important. So just like to echo the point about either natural or manmade paths, routes for cyclists and pedestrians, so wide enough paths." (Chelmsford)*
- *"There are sections of the river Wansbeck that are very accessible in and around the Ashington area, which are very good. But this just being said, some of the parts nearer to the mouth are less user friendly, shall we say, you know, there's lots of pools, they're not always*



*that clear. I think that there is certainly room for improvement, I often get a bit frustrated.”*  
(Ashington)

- *“I'd expect it to be clean, but also safe. So, if there are walkways and stuff, to have some sort of protection for kids, so they're not going to fall and slip.” (Stockton/Billingham)*
- *“I think we need to consider people who have got disabilities, anyone using a wheelchair, manual or automated. You'd hope that obviously, I know it's not possible for all areas where there are natural paths, but at least some provision for people who would be using a wheelchair.” (Chelmsford)*
- *“There should be a substantial amount with sensible wheelchair access, or even people that are walking with sticks or anything like that.” (Framlingham/Saxmundham)*
- *“I think they need to be child friendly around lakes and stuff with maybe fencing”*  
(Hornchurch/Upminster in-depth)

Other expectations respondents had about accessibility included:

- To ensure that there is adequate lighting near water environments at night to avoid accidents (Durham only)
- To cut grass and overgrown vegetation to ensure pathways are clear and accessible.
- To reduce flood risk of footpaths and maintain sensible water levels to avoid accidents.
- Signage to ensure safety.

## Wildlife expectations

In terms of wildlife and biodiversity, one of the themes identified across focus groups was that water environments should be **safe for wildlife to thrive**.

In addition, it was important for qualitative respondents to **physically see evidence of wildlife**, particularly animals:

- *“Not just because it's aesthetically pleasing when you have a nice clean river and bank, but also because I don't want to see animals or fish, or birds get harmed. So, for me, I'd say that's probably the minimum, somewhere where vegetation and animals can thrive effectively.”*  
(Durham)
- *“For me, wildlife and having my children being able to go to these areas and see frog spawn and see wildlife and see birds and see an array of them, because obviously places like bird sanctuaries, things that you go and see is lovely. But, when they're little, you know, they*



*want the frogs jumping around, they want to see all the different varieties.”  
(Hornchurch/Upminster)*

- *“We live in the country. You know, if you do not live in London or anything like that, it's an expectation that you see wildlife. So that would be the minimum - the fact that there would be wildlife of some sort.” (Framlingham/Saxmundham)*
- *“If you go to the park, you expect to see the ducks in the lake” (Hornchurch/Upminster in-depth)*

Some focus group respondents also felt that it would be good to have **more information** about what wildlife can be identified in certain areas, for example by providing information boards and signage.

- *“I'm just thinking that, obviously, we see swans and bits of wildlife. Sometimes if you had a picture board or something that you see in some areas with photographs of some of the wildlife and stuff, people will be much more aware of what's actually there. You know, we see it and we know what it is because we've seen it, but younger children and younger people may not be aware of what actually is in the river itself or in the sea” (Ashington)*
- *“I think you go further up the coast, you know, where the wildlife hides are up to Druridge Bay, Hawksley and so on. There's lots of visitor information about what's there and what's accessible. I think if there was something similar, on a more local level, it would definitely work there” (Ashington)*

Additional aspects mentioned about wildlife and biodiversity included:

- Maintain and preserve natural habitats and ecosystems, and
- Ensure that natural ecosystems are not disturbed by humans/infrastructure.

When asked whether they were any additional aspects that respondents would like to see that would go above and beyond basic expectations, they mentioned the following aspects unprompted:

- Raised walkways/boardwalk areas;
- Signage around wildlife and biodiversity, and
- Guided nature walks.



## Water quality expectations

Across the groups and in-depth interviews, water quality was the most commonly mentioned aspect in terms of minimum expectations.

Respondents wanted to be sure that **both** the water itself and the surrounding area **was clean and well maintained**. What would be considered 'clean' and 'well maintained' included the following:

- Ensure that water is safe for human health if they were to use the water environment, e.g., for leisure activities such as swimming.
- Ensure that water is free of algae/chemicals/foam.
- Ensure that there is no rubbish left in water or surrounding areas (or to be cleaned up as soon as possible if so and bins emptied regularly).
- Ensure that water is safe and habitable for wildlife to live.

□ *"I would expect things to be clean and easily accessible. So nice walkways, for it to be used for both practical tasks and for leisure purposes for the local residents. Basically, accessible for both either cyclists, runners, or dog walkers in general. Primarily it has to be clean and well maintained." (Stockton/Billingham)*

□ *"I expect to see clean running water. I think when there's a lot of things thrown in the water and old bikes and stuff, it's a bit of a put off, isn't it?" (Seaham/Blackhall)*

□ *"I would expect it to be to be clean. For instance, I saw foam on the water. I would like to think of it as obviously Northumbrian Water have got standards in place. I expect to be able to go and take my grandchildren, my children onto the beach and not pick up any infections off the water or off the beach." (Berwick)*

□ *"It's depressing when the water is not clean, and it's got a lot of algae in it. A lot of green is just obviously not looked after. And then also that point about rubbish that some public people are leaving. Now, unfortunately, that's left there for ages and ages and ages. So, I think these places that we can visit would be lovely if they were clean and if they were managed." (Hornchurch/Upminster)*

□ *"I expect to see them clean, no rubbish. Nothing overgrown over the water. Generally tidy, no rubbish. Because it's off-putting if you see loads of rubbish next to a stream or river just dumped there, so you would expect nice tidy clean, flowing streams and rivers." (Seaham/Blackhall)*



- *“Minimum is probably the cleanliness of course, there is no rubbish and there are available rubbish bins and it’s clean and that is the minimum basically” (Framlingham in-depth)*
- *“Cleanliness is obviously a big one, so bins to get emptied regularly - that sort of thing. And then yeah, like the safety of people – safe, clean water and the safety of animals.” (Durham)*

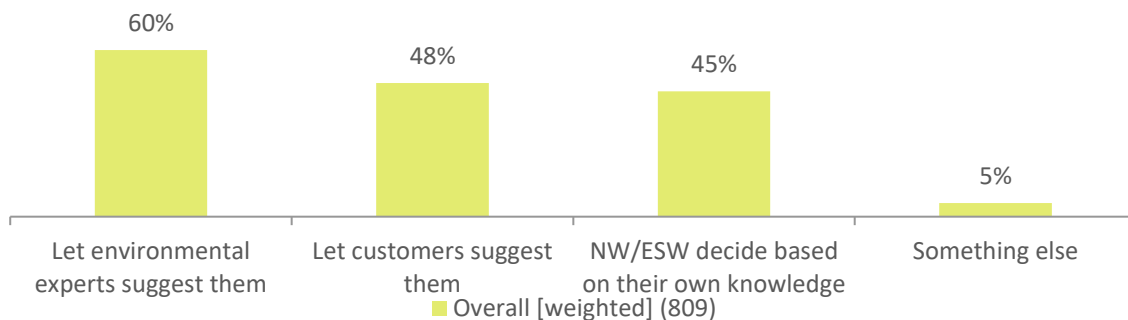
Some focus group respondents also felt that it would be useful for it to be explicitly stated where water was not clean or safe, for example through signage:

- *“I think you need to know if it wasn't clean. I think if it wasn't clean, I would want something very clear for people with either dogs or children or grandmas that wanted to go swimming.” (Framlingham/Saxmundham)*
- *“It would be really nice if there was a summary of the water quality in that area, so this water has been tested in the last six months and it got this level of cleanliness. Obviously in a really fast flowing river, next to lots of agriculture, that’s maybe harder to test, I don’t know, than it is in sea water, but if there was some indication of how clean it is, that would be nice.” (Alston)*

## How NW/ESW should go about possible projects

All survey respondents were asked how they think possible projects should be proposed. Overall, the most popular choice was for NW/ESW to let environmental experts suggest possible projects (60%). Respondents were able to select multiple answers, and 48% felt that NW/ESW should let customers suggest them, with this being the most popular choice amongst ESW non-bill payers (58%). When reviewing results by SEG, those in groups ABC1 were significantly more likely to suggest that NW/ESW should let environmental experts suggest possible projects (65%) than those in groups C2DE (56%).

**How do you think possible projects should be proposed? For example, how should NW/ESW go about creating a list of possible projects to work on? Please select all that apply.**

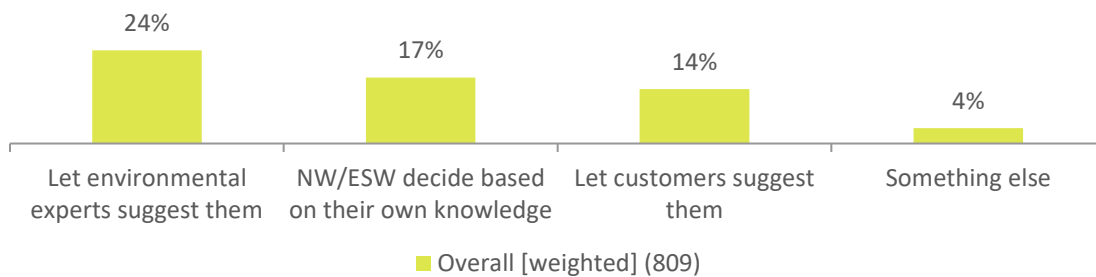




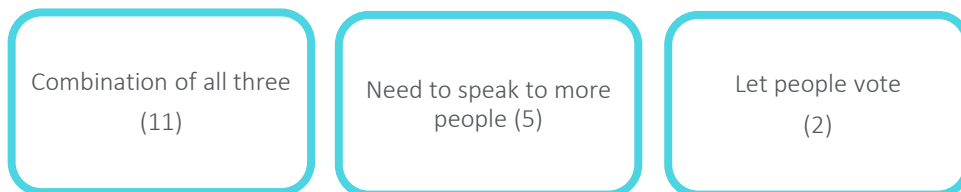
We can also look at the results in such a way that we can understand what option respondents chose when they selected one option only. 24% of all respondents selected 'let environmental experts suggest them' exclusively, while 17% exclusively wanted NWG to decide based on their knowledge.

A very small proportion of respondents (0.5%) selected all four options.

**How do you think possible projects should be proposed? For example, how should NW/ESW go about creating a list of possible projects to work on?  
Please select all that apply. [EXCLUSIVE CHOICES ONLY]**



Respondents that answered, 'something else' (5% overall) were asked to state how they think possible projects should be proposed. Responses among NW respondents included the following:



- "A sensible mix of the above, with some consultation before implementation." (NW bill payer)
- "A combination of all options." (NW non-bill payer)
- "Consider all views. It's not for one group to decide." (NW bill payer)
- "Send out a list of possibilities and pick whichever gets best response." (NW bill payer)



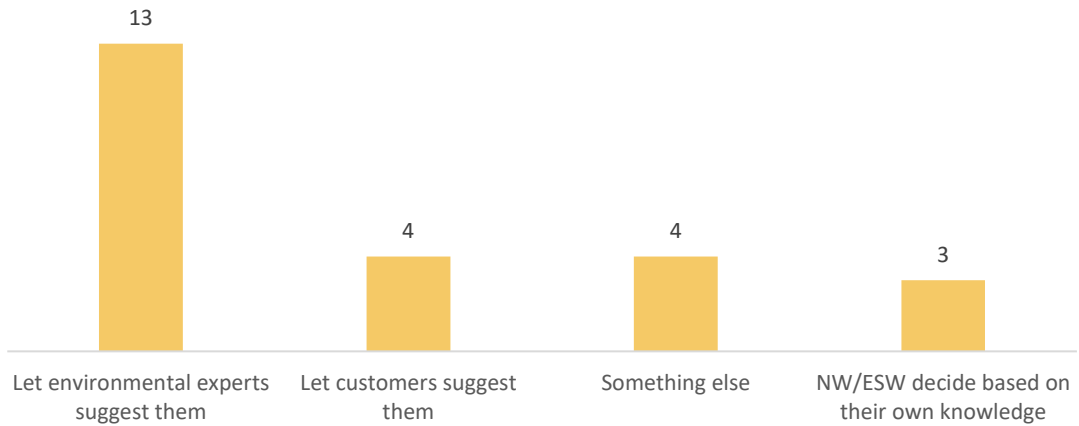
Responses amongst ESW respondents included:



- *“It might take longer but all parties should be able to make suggestions.” (ESW bill payer)*
- *“Conduct a review of waterways and lakes to prioritise.” (ESW non-bill payer)*

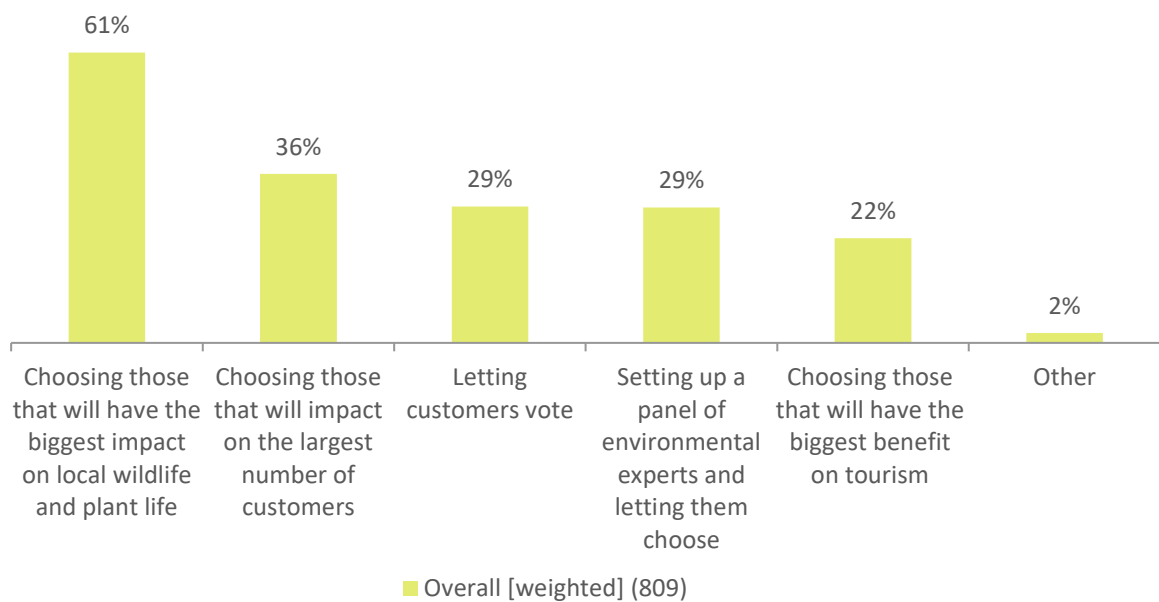
This question was also asked of respondents in the online groups via the Zoom polling feature, although this time respondents were only asked to select the one option they considered most important. Similar to the findings from the survey, most respondents preferred environmental experts to suggest projects (13 respondents). Please note, this poll was not completed in all groups due to time constraints.

**How do you think possible projects should be proposed? For example, how should NW/ESW go about creating a list of possible projects to work on?  
[EXCLUSIVE CHOICES ONLY]  
(Base 24)**



All survey respondents were asked how they think NW/ESW should go about choosing which specific projects to work on once they had a list of possible projects. Again, respondents could select more than one answer. The majority felt that NW/ESW should choose the projects that will have the biggest impact on local wildlife and plant life (61%), and a further third (36%) wanted NWG to choose projects which will impact on the largest number of customers.

**Once NW/ESW have a list of possible projects, how do you think they should go about choosing which ones they work on? Please select all that apply.**



Other responses included focusing on prioritising areas in need (NW – 2) and focusing on specific areas (ESW - 2).

Comparing results for regional and demographic differences:

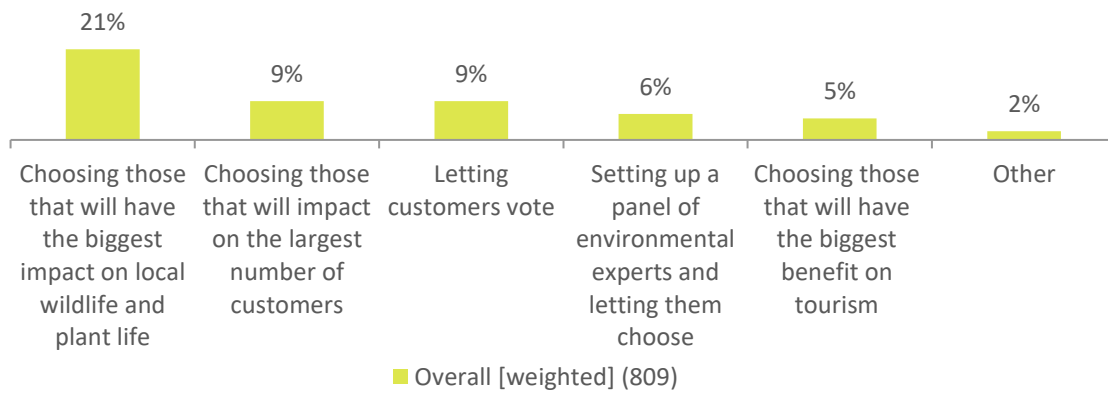
- A higher proportion of ESW bill payers (69%) felt that ESW should choose those that will have the biggest impact on wildlife and plant life than NW bill payers (59%);
- Older people were more likely to want to see a panel of experts set up to choose the projects. 38% of 50-69s and 33% of 70+ year-olds wanted to see this, compared to 22% of 18-29 year-olds.
- Younger people (18-29s) were significantly more likely to want customers to have the opportunity to vote on the projects to choose (37% vs. 24% amongst those aged 70 and over).
- The 50-69 age group was the most likely to consider the impact on wildlife and plant life important (65% vs. 54% amongst the 18-29s).



Again, looking at the proportion of respondents who selected one option only, 21% of respondents exclusively wanted NWG to choose the projects which will have the biggest impact on local wildlife and plant life, with lower appetite for any of the other options on an exclusive basis.

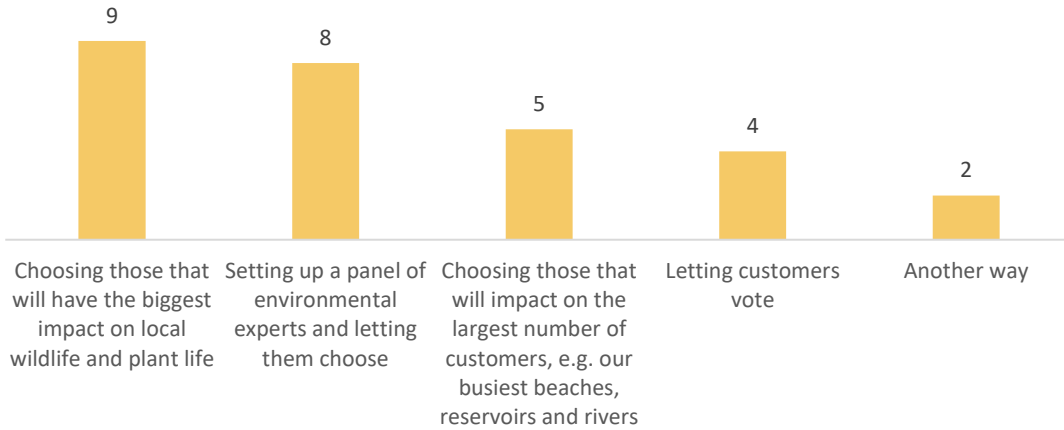
2% of respondents selected all five of the main options excluding 'other' (no one selected all six including other).

**Once NW/ESW have a list of possible projects, how do you think they should go about choosing which ones they work on? Please select all that apply.  
[EXCLUSIVE CHOICES ONLY]**



When asked to focus group respondents in the qualitative phase, with attendees asked to select the one option they considered most important, the most popular response was also ‘choosing those that will have the biggest impact on local wildlife and plant life’ (9 respondents). Please note, this poll was not completed in all groups due to time constraints.

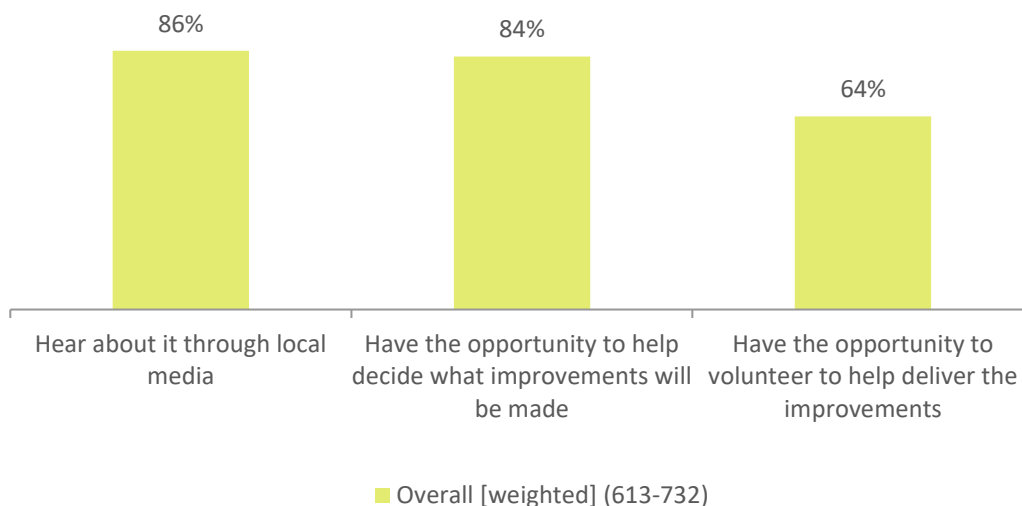
**Once NW/ESW have a list of possible projects, how do you think they should go about choosing which ones they work on? [EXCLUSIVE CHOICES ONLY]  
(base - 28)**



All survey respondents were then asked whether they would like to be involved in three ways if a project was proposed in their local area. Overall, there was **keen willingness to be involved** in local projects, with the majority answering ‘yes’ to each opportunity presented to them (have the opportunity to help decide what improvements will be made, have the opportunity to volunteer to help deliver the improvements or hear about it through local media).

Overall, 86% wished to hear about projects through local media, 84% wished to have the opportunity to help decide what improvements will be made and 64% wanted to have the opportunity to volunteer to help deliver the improvements. When reviewing results by SEG, those in groups C2DE were significantly more likely to want to have the opportunity to volunteer to help deliver improvements (71%) than those in groups ABC1 (57%). Results suggest there could be a willing local population who could provide support in delivering NW/ESW’s improvement objectives.

**If a project was proposed in your local area, would you like to...? (% yes)**



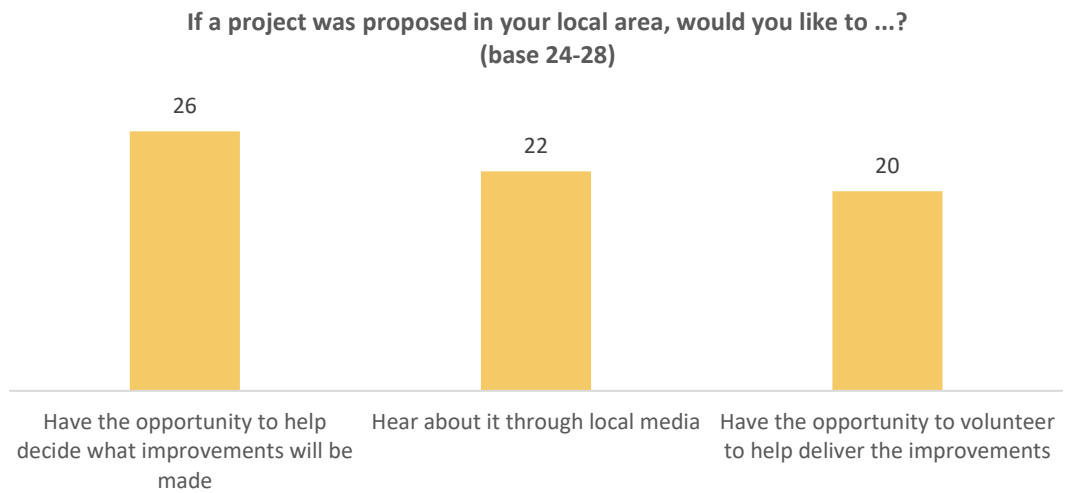
Considering distinctions in response by demographic factors:

- Younger age groups were significantly more likely to want the opportunity to help decide what improvements will be made than the older age groups – 88% of 30-49s and 86% of 18-29 year-olds wanted to help decide, compared to 78% of 50-69s and 80% of 70+ year-olds.
- A similar pattern was seen about having the opportunity to volunteer to help deliver improvements – 78% of 30-49s and 74% of 18-29 year-olds wanted the chance to volunteer, compared to 50% of 50-69 year-olds and 28% of those aged 70 and over.



- Female respondents were significantly more likely than males to want the opportunity to help decide what improvements will be made (88% and 80% respectively) and to have the opportunity to volunteer to deliver the improvements (68% and 61% respectively).

Again, this question was also asked during the online focus groups and again there was a general keenness to be involved, with 26 respondents keen to have the opportunity to help decide what improvements will be made. Please note, this poll was not completed in all groups due to time constraints.



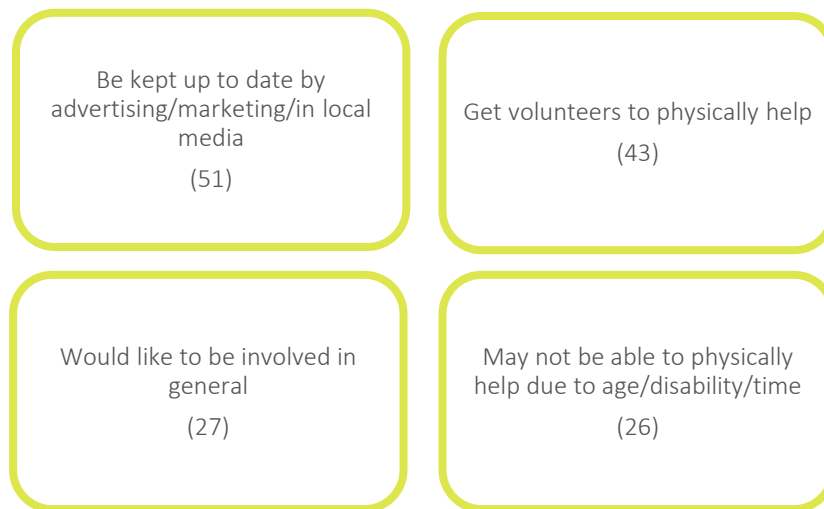
In-depth interview respondents were also asked how they would like to get involved if a project was proposed in their local area. Of those who answered this question (four respondents), all were keen to have the opportunity to help deliver what improvements will be made, to hear about it through the local media and to have the opportunity to help deliver the improvements.



All survey respondents were asked whether there were any other ways that they would like to be involved in a project happening in their local area. This question was an open question but was not required.

Across both locations, there was a general willingness to be involved in projects in a practical sense and to hear more about them in the local media.

Themes included:



11 NW respondents also commented they would like to be involved via public consultation, while four ESW respondents wanted to see schools involved.

- *"It would be good if people living near these areas and use them daily are consulted on a regular basis." (NW bill payer)*
- *"Once a plan has been decided then you could advertise in local media to get people online to have a look and then make any further suggestions." (NW non-bill payer)*
- *"I would like to be informed on what is being done and be kept up to date on the progress." (ESW bill payer)*
- *"As long as the local community have a chance to get involved there should not be a problem." (ESW bill payer)*
- *"Hands on or promoting with the children, getting local organisations and schools involved. I volunteered with local scouting groups and it is definitely would be something that would love to be involved with." (ESW bill payer)*
- *"It would be encouraging to get schools and local children involved in the programme. Hold sessions where they can learn and help." (ESW bill payer)*





## Case study feedback

In the qualitative focus groups and in-depth interviews, respondents were asked to provide feedback on areas of development/improvements that NW/ESW already have planned or have recently completed. Moderators shared their screen with respondents to talk through a PowerPoint presentation with examples of this work. The case studies that were shared with respondents differed per region (NW/ESW) and were chosen specifically to present a variety of different improvements, therefore overall themes have not been drawn due to the uniqueness of the examples explored.

### Northumbrian Water case studies

Three case studies were shared with respondents living in the North. These were: Kielder Water and Forest Park enhancement, Royal Quays Marina, and Upper Skerne Bridleway and river restoration. This information was provided by NW (presented by Explain facilitators) and included examples of the improvements, indicative timescales and supporting imagery. The full slide deck shared with each group/in-depth respondent can be found in Appendix 13.

Moderators at each group shared their screen and talked through each case study before asking respondents for their thoughts on the examples.

**All case study examples were well received across the groups and in the in-depth interviews.**

#### Kielder Water and Forest Park enhancement

Although there was a positive reaction to all case studies, some respondents felt that there wasn't a need to invest any more money into Kielder Water and Forest Park. This was because respondents generally felt that the area was **already in good condition** and that a lot of investment had gone into the area in the past few years. There was also some resistance towards over-developing natural sites with man-made surfaces.

- *"We used to have a motorhome and go motor homing a lot. When we lived in Oxfordshire we used to come up to Kielder and we used to go to the observatory, so we've spent a lot of time in Kielder and we loved cycling right round and everything else. I think sometimes it can be all a bit too shiny, that people coming into nature, I have friends that say to me I don't do nature, and they want those nice smooth paths. At the moment because I've got a bad back smooth paths are ideal for me, but I don't mind a bit of bumpiness." (Alston)*
- *"It obviously is the big water feature, probably why they've spent a lot of money there, but maybe they could be spending elsewhere." (Ashington)*



However, there was general support across groups and in-depths specifically for the **protection of the red squirrel** around Kielder by a dedicated ranger. In addition, respondents suggested the ranger provide more information about this species.

- *“The main focus, I'd say there, is definitely the protection of animals and stuff and the ranger is a really good idea. I wish a lot more other places like that actually had someone looking after the place and were there if you needed any questions and stuff like that.”*  
(Stockton/Billingham)
- *“I'm very happy that you guys are protecting red squirrels. They're really rare - especially in England.”* (Durham)
- *“I think it's great, especially the dedicated ranger for red squirrels because the population in that area obviously needs help. I don't know what the situation is with the grey squirrel. But having a dedicated ranger that is around to talk to people, not just looking after the red squirrel, but also improving people's perceptions on how they're likely to see a red squirrel, and what times of day to go along.”* (Alston)
- *“I like they are going to look after the squirrels, especially the red ones. It's just nice that they are. It makes you aware where the red squirrel is compared with the grey and I think that's just really nice, and wheelchair access for the telescope is really good.”* (Berwick)
- *“I think improvements to Kielder are important because you've included the wildlife and red squirrels are really important and I know grey squirrels are a massive threat”* (Seaham in-depth)

## Royal Quays Marina

This scheme was received well across all groups, particularly for being something 'different' and in an urban area, rather than rural. The general consensus across groups was that this was a well worthwhile area to focus on as it is **accessible to a large number of people**.

- *“I think it's an urban area for a start, and you have a lot more people there. It's a lot more accessible to people -, there's more people within that catchment. And therefore, to me, it's money well spent. Because, you know, we obviously have got a much bigger area of a group of people that can use it. Yeah, I like the idea.”* (Ashington)
- *“I think anything that promotes the natural habitats and the wildlife, and anything that gets you there and starts and sparks a conversation, is always a good idea. And it seems from the two case studies I've seen that you're trying to find the balance between human interaction and the effect that that has on the surrounding environment. So, to me anything like this is absolutely fantastic.”* (Durham)



- *“It’s like focusing upon a different area, isn’t it? Like in the Marina, there’s probably not a lot of that in existence.” (Ashington)*

In addition, respondents felt that the improvements in this area would **attract more visitors**. However, one respondent acknowledged that this may not be a positive thing for those who live in the area and those who would prefer less visitors. Some respondents felt that it was important to **get the balance right** so that attracting more visitors does not do so with environmental detriment (for example excess litter).

- *“It’s got more benches, and it’s going to look more attractive to people. I go once a week, I didn’t know that you could go down there and walk down. I didn’t know there’s anything to look at. So, if people are aware of it, it might bring people to go around the port and have a sit down and stuff. I don’t know what impact it would make on the area. If there’s works going on [people in] the area might complain but they will do that anywhere where there’s work going on, and if it attracts more people to the area where people have gone to retire and be quiet, then they will probably complain about that, too.” (Durham)*
- *“I think it’s good to counteract the negative impact of it being there and all the fuels and stuff and the impact on the environment. So, it’s good to rejuvenate it all and help along with the environment. If it’s pretty and people are going to visit there, it’s going to become a popular area and it could be good for local businesses for food areas and stuff to open up on the marina. So, I think it could have positive impacts. It’s good.” (Stockton/Billingham)*
- *“Promoting eco-tourism is always a positive. Obviously, we do have drawbacks, with the more human attention that a place will get with that comes littering and things like that.” (Durham)*
- *“If you have floating vegetated islands, you need to make sure that anybody who owns a boat in the area or who drives the boat doesn’t drive through it, I think it’s really important to work with the local community there and maybe even go so far as to introduce some sort of sanction, or fine to anybody who damages wildlife like that. Because the key thing is that people know, people need to be aware of the fact there will be areas to support, fish, birds, etc, etc, and that they can’t just drive through them without any consequences.” (Durham)*



## Upper Skerne Bridleway and river restoration

Of all the case studies, **fewer respondents were aware of this area** than the others and therefore didn't feel in a position to give much detailed feedback. Some respondents suggested that it would be a good idea to **raise awareness and publicise** this area because they would use the area if they were aware of it. These respondents also liked the idea of the guided walk and felt that this would be a good way to attract visitors:

- *"I reckon, could be worth investing in publicity, and so on, just to make sure that local people will actually know of it's in existence and make use of it. I think this project is really positive and if only more people would notice that."* (Durham)
- *"I think it's an improvement. It's somewhere I would visit if I was local. But the fact of its location, to me it seems to be away from any major centres of population, people would have to travel. And I suppose it's how cost effective it is. I think it would attract some people. I don't know if it would attract too many. I might be totally off beam here in terms of its location, but it looks fairly remote."* (Ashington)
- *"I like the idea of a guided walk as well, which obviously, for people from outside of the area, you are going to have experts in that field and going to be telling them all about it. If you make a path easier to walk down, then people will just be going to naturally want to explore. So again, it is improving the area, it's giving something else for people to visit."* (Ashington)
- *"Not something that I've ever been to or been involved in, but I imagine that the local residents and people that visit there, it's going to improve their visit"* (Seaham in-depth)
- *"I like the idea of going for a walk and learning something"* (Ashington in-depth)

In general, respondents felt that this project would impact fewer people than the other two case studies but would have a more positive impact on wildlife and biodiversity, which was generally seen as a positive thing:

- *"The naturalisation of the channel sounds positive. And obviously creating new habitats as well as, you know, promoting conservation and making it a more sort of protected area."* (Durham)
- *"I think it's important for the wildlife, to improve the quality of the river to improve the biodiversity. It depends on what aim there is at the end of it. Is the aim just to improve water quality, improve biodiversity, or is it to get more people there?"* (Ashington)



Across the groups, **views varied about which case study should be the greatest priority**. In Alston, all respondents favoured improvements to Upper Skerne Bridleway, but across the other groups, the preference tended to be for improvements to Royal Quays Marina, mainly because this would have the greatest impact on the most people, and also because it would attract more visitors and businesses to the local area. One in-depth interviewee expressed that they felt the greatest priority should be Kielder, particularly because of the impact that improvements would have on wildlife.

Respondents in some groups said they would prefer to see improvements which focused on wildlife and local eco-systems that would impact fewer people (for example those in Alston) and in others (for example in Ashington), the preference was for improvements that would impact more people and have less of an impact on wildlife.

## Essex & Suffolk Water case studies

Three case studies were shared with respondents living in the Essex & Suffolk Water region. These were: Carlton Marshes, Bocking Mill, and Chelmer and Blackwater navigation. This information was provided by ESW, presented in the sessions by Explain, and included specific examples of what the improvements consisted of, indicative timescales and supporting imagery. The full slide deck shared can be found in Appendix 12.

Moderators at each group/in each in-depth shared slides and talked through each case study before asking respondents for their thoughts on the examples shared.

Overall, **all case study examples were well received across the groups and in the in-depth interviews.**



## Carlton Marshes

Across all groups, respondents liked the improvements suggested for this area and felt that the scheme **covered their unprompted priorities** that had been mentioned earlier in the discussion.

- *“I think there was a load of stuff in there I liked. I mean, there's a load of stuff in there that we've already discussed – like having a big area devoted nature. You've got all the boardwalks, which should make it easy for children's strollers, pushchairs, wheelchairs, sticks, anything like that, to kind of you know get through the middle if - that's kind of where they go. You've got toilets there and facilities there, sounds pretty good to me.”*  
(Framlingham/Saxmundham)
- *“When you say wetlands, this is exactly the sort of thing that I have in mind, you know, boats going to take the kids out. Just what a day out of fresh air sort of place I would picture.”*  
(Chelmsford)
- *“I think it's difficult without actually visiting the site, but the list of features here seems very positive, and they seem to have captured many of the things that we've already said.”*  
(Chelmsford)

Some respondents were especially **keen on the educational programme** allowing Suffolk Wildlife Trust to **raise awareness of the site** and the importance of wildlife and biodiversity to the public:

- *“It would benefit the education side of things as well. Schools would be able to use it.”*  
(Framlingham/Saxmundham)
- *“It sounds brilliant. Yeah, it sounds great. For the children really, we very much need to encourage children to take more of an interest in the nature and outdoors. So, the fact that there's the educational program there, and the play scape, and the access paths...”*  
(Hornchurch/Upminster)

## Bocking Mill

Again, across all groups, respondents appreciated the suggested improvements to the Bocking Mill area. Respondents felt that the improvements in this area were **more focused on wildlife and biodiversity than accessibility and attracting people** to the area. Therefore, there was consensus that these improvements would have less noticeable benefits to the public:

- *“I think it's less accessible to people, because it's principally for wildlife or benefit of fish, which is good. I'm not disputing that. And also, for fishing anglers as well. So, I think that would have less benefit to the general population than the previous example.”*  
(Hornchurch/Upminster)



- *“So, this probably hits the wildlife and biodiversity aspects of the programme. It is purely to do with migratory fish. There's been quite a lot of documents on them and these sorts of structures really are a massive barrier to migratory fish. There's quite a lot of issues with sustainability with salmon and other species that can't get up and down the rivers as they naturally would.” (Framlingham/Saxmundham)*
- *“I suppose that will be helping out the fish” (Hornchurch/Upminster in-depth)*

Again, across the groups, the **educational element of improvements to this area** (online engagement, including video presentations that will help people access information about the river and its catchment) were particularly well received:

- *“The online engagement would be quite good to do in terms of school learning. I mean, this sort of place would be a great school trip, wouldn't it? So, you'd do the online learning in the classroom to start with or after and then get the kids involved with, ‘This is the type of fish we've got here. And this is why they migrate.’ And so, you've almost got the online aspect of it in the classroom, and then they can go out and see it for themselves and see it happening. So yeah, I'm looking forward to visiting this once it's finished.” (Chelmsford)*
- *“This would be combining that wildlife and biodiversity aspect with a lot of community engagement, and then improving access to show what these were structures do and why it's being removed. So, the educational element of it as well.” (Framlingham/Saxmundham)*

## Chelmer and Blackwater navigation

Across all groups, respondents felt that it was a **very high priority to make improvements to the paths** in this area, particularly as the current walkways may be a safety hazard and are inaccessible to those who are disabled or with pushchairs. This was also highlighted in the in-depth interviews. Please note, an image was shared specifically of the pathway and this may have impacted responses. This area had specifically been mentioned by one respondent in the Hornchurch group before being prompted with the example:

- *“I love the fact that you're going to do something about that path. I mean, that's just quite obvious. If it's going to be miserable weather and you're walking dogs, they're going to get filthy, kids are just going to keep slipping over. You're never going to get down there with crutches, sticks, wheelchair, stroller, anything, you know.” (Framlingham/Saxmundham)*
- *“The path thing for me is more important, because look at the state of how it is and that's just not safe to go down and enjoy.” (Hornchurch/Upminster)*
- *“Look at how muddy that is. Not everyone would be happy to walk through that - particularly if you were disabled or had a buggy or had forgotten your wellies. You probably wouldn't*



*spend much time there. You'd go back. So, I think making that more accessible for more months of the year is a really great idea.” (Chelmsford)*

- *“That’s good because to me that looks a bit dangerous. I wouldn’t like to walk down that pathway on the right, I think I would turnaround and go back” (Hornchurch/Upminster in-depth)*

Additionally, respondents liked the idea of **putting up additional signage** to both reduce litter and keep dogs off sensitive areas. However, one respondent was concerned that signage may not have a great impact on achieving this:

- *“But does the signage and everything really help? Does that actually encourage people? How are we dealing with the litter in these places?” (Hornchurch/Upminster)*

Respondents highlighted the need to ensure that these areas were **maintained** in the future, rather than as a ‘one off’ improvement, for example by allocating someone the role of maintaining areas or establishing volunteer programmes:

- *“If there are volunteer programs, I'm sure that people are looking to get out and do things like that now. But obviously, what you don't want to do is invest all of this money make all these places beautiful and then actually they're getting ruined before they've had a chance to be enjoyed. Which, as we know, waste and plastic in rivers and etc. is generally a massive problem that we will have.” (Hornchurch/Upminster)*

As with those in the north, **views varied about which case study should be greatest priority**. In Chelmsford, most respondents felt that improvements to Chelmer and Blackwater would have the greatest impact on them directly. However, across all groups and in-depths, respondents also tended to particularly like the improvements made to Carlton Marshes.





## Co-creating possible local improvements and proposed scheme feedback (phase 2)

Following feedback about the case studies, the Miro tool was introduced to support discussion about possible local improvements and proposed schemes. Firstly, each group/in-depth interview respondent was presented with a map of their local area and were asked to make suggestions of specific things that NW/ESW could do to improve water environment sites within the local area under the key themes of access and facilities, water quality, and wildlife and biodiversity.

The facilitator collated suggestions and added them to the map in the appropriate locations (*Please note that in Berwick, respondents added their suggestions to the map themselves before the discussion guide was tweaked*).

Respondents were also asked to bring their reflections on the local sites they considered during the pre-reading/task.

An example map of Berwick and how this was subsequently populated can be seen below. All maps are available in Appendix 14/15.



Following this, and still using the Miro tool, each group/in-depth respondent was introduced to some ideas that NW/ESW already had for each local area through previous conversations with customers and stakeholders (including Phase 1 of this research). Each group/in-depth respondent was informed that not all the opportunities identified may be developed into deliverable projects. Respondents were asked to provide feedback on each proposal, including positives and negatives, and identifying any areas for NW/ESW to think about or any suggestions as to how to build on each proposal.

Again, an example map of proposed schemes that was shared in Berwick can be seen below and all maps are available in Appendix 16.



The following section describes respondents' unprompted co-creation of possible improvements, and their feedback on current proposed schemes, from each group location.

## Berwick

### Co-creating possible local improvements

When provided with a blank map of the local area, the following issues and suggestions for improvements were made by respondents in the Berwick group:

- Reservoirs which feed Colt Crag (between Sweethope and Hannington):
  - o There is excess runoff and doesn't seem to be any systematic warning to users of the reservoir.
  - o If there is going to be a heavy demand on water, it leaves a large amount of exposed mud which is unattractive.
- Cattle roaming at the beach two miles north of Spittal:
  - o Cattle roam onto the beach water, which deters the public from walking on the beach.
  - o Some members of the public are scared of the cows, so they actively turn back when they realise that they are allowed on the beach itself.
- Giant hogweed in Twizel alongside the river:
  - o There is a problem with giant hogweed, particularly near the river, which is harmful for children if they touch it (sap causes blisters).
  - o This is also impeding access along the river bank and obstructing access.
- Would be good to have full foot access down both sides of the River in Norham.
- Coastal erosion - access road needs grasses to secure the sand.
- Would be good to have more wildlife/fish in streams north and south of Berwick (Allerdene).



## Proposed scheme feedback

The group was then presented with the map of proposed schemes in the area. Overall, all three proposed schemes (Destination Tweed, Spittal Bathing Water Investigation and Fell Sandstone Sustainability Investigation) **were well received by the group.**

One respondent asked further questions about the work around Fell Sandstone and the background to the project, which were answered by the NW representative present in the group. Specifically, this respondent wanted to know exactly what the investigation would involve.

- *"I think it is positive, anything nice is good." (Berwick)*
- *"I declare an interest, I think it's probably my cousin's farm, actually. But they seem to have a water extraction and treatment plant there. But given the sort of mega business approach to farming, I can well understand that there'll be anxieties about provisioning of the aquifers. I think that's an excellent idea." (Berwick)*

## Alston

### Co-creating possible local improvements

The following unprompted suggestions were made by respondents in the Alston group:

- The pathway underneath Brewery Bridge needs maintaining (road from Alston out towards Brampton and Penrith):
  - This is currently a safety hazard, particularly when the river is high.
  - Three respondents commented that this was highly necessary.
  - One respondent suggested this could be achieved by raising the whole level of the pathway under the bridge.
  - One respondent suggested the inclusion of a handrail next to the steps.
  - One respondent also sent in images of the specific area they were referencing here to support discussion.



- Pathways along the river (Alston to Penrith) could be extended:
  - o Respondents suggested that Northumbrian Water could work alongside landowners and South Tyne Railway to achieve this, to encourage more people to the area.
- Connecting walkways around the new bridge at Kirkhaugh:
  - o There are currently footpaths at both sides of the river, but it would be good to connect these up, for example by building a new bridge.
- A safe spot for open swimming:
  - o This should also have a car park so it's easily accessible.
  - o One respondent stated that there was currently a safe spot for open swimming (on the way to Haltwhistle, just past Slaggyford) but there is no car parking or bins. They suggested consulting locals about ways to make the area more accessible but keep it clean/tidy.
  - o One respondent suggested producing a book that provides information about safe places where people could swim.
- A safe spot for water sports such as kayaking:
  - o This should also be accessible.
- Maintenance of railway path alongside the South Tyne:
  - o There is a steep bank into the water which is currently unsafe, particularly for children.
  - o Bins need to be emptied regularly, particularly in summer.
  - o General maintenance of the footpaths.
  - o Generally connecting more pathways to make more circular routes.

In this group, one respondent also shared several images of Amble and Norway and highlighted some aspects in both areas that they felt could be useful to learn from.



In Amble, the respondent referred to the marina village on the seafront, with attractive buildings, residential properties, cafes and selling pods. This respondent felt that Amble was an attractive area that had achieved the right 'balance' of not being over developed but also attracting new visitors to the area:



When the respondent shared an image of Norway, they referred to the way areas beside the sea are worked on all the time, but in a subtle way so that it doesn't look over-developed. Examples included adding small bins or information points in a low-key way that does not take anything away from the natural look of the area.



### Proposed scheme feedback

In Alston, again, **all proposed schemes were received well** by members of the group. In particular, improving access along the South Tyne Trail, **which had been mentioned previously as an unprompted suggested area** for improvements to be made:

- *"I think the South Tyne Trail, that's partly along the railway line as well. So that's what I was on about before. Alan Banks and Stoward Gorge - that's lovely around there. The woodland restoration, I know when I used to work in Hexham trees would regularly fall onto the road. Improving different types of vegetation there along the banks would be ideal. I would support that. Geltsdale, I've not been there for a long time, but I know it's quite bleak up there. So, any habitat restoration, rather than just having a fell, would be useful." (Alston)*



There were also some questions raised around the South Tyne Catchment Project. One respondent wanted to know whether this would be partially about improving the quality of drinking water. Again, these questions were answered by the NW representative present at each group, who provided further detail and background on the project.

## Ashington

### Co-creating possible local improvements

The following suggestions were made by respondents in the Ashington group:

- Connecting pathways on the north and south bank of the River Wansbeck:
  - o In particular, a footpath up along the south shore from the mouth of Cambois as far as West Sleekburn.
- Improved footpaths.
- More rubbish bins.
- Signage for wildlife.
- Unsightly area on Cambois Beach (heading north to Cresswell) where the power station is:
  - o Currently the area looks really messy, unkempt and has a lot of coal waste etc. and people avoid this area.
  - o There is also dirty groundwater that flows into the sea and is an unsightly orange colour.
- Car parking needs maintaining at QE Water (beside Woodhorn Colliery Museum):
  - o Currently the car park is unkempt and having to pay to park is a deterrent.
- Create areas for wildlife, e.g. developing reserves in areas that used to be rubbish tips.
- Adding water features/wetlands in Northumberlandia.

During the in-depth interview at this location, additional suggestions made by this respondent were:

- Extend the opening hours at Druridge Bay Country Park.
- Extend pathways and make longer/more circular routes around the River Wansbeck, particularly near Sandy Bay.



## Proposed scheme feedback

The group was then presented with the onscreen map of proposed schemes in the area. Amongst the Ashington group, questions arose about what improvements would be made to the Wansbeck Barrage and whether this would be in relation to paths, roads or car parks. These questions were answered by the NW representative present at the group. As this area **had already been mentioned** by respondents when asked for suggested improvements, this was particularly well received:

- *“Certainly see some improvements along that southern shore of the river. That was what I was talking about. You know, if it's possible to improve footpath access on the southern shore. The north shore could do with footpath improvement, of course, but there isn't one on the south so yeah, that was it?” (Ashington)*
- *“I think that's a good idea and that will be welcomed. And while you're doing that, you could do other improvements, as well I suppose.” (Ashington)*

There were also questions posed to NW representatives about the proposed habitat restoration work at Blyth Estuary. Again, respondents tended to think that this would make a positive impact, but also felt that this could be extended to also consider making improvements to accessibility, particularly around the north site of the estuary where the old power station was previously.

- *“Again, it's a bit like the river Wansbeck the south shore. It's got access. There are footpaths all the way along, but it's very difficult to access the north side of the estuary. That's where the old power station was - building a new factory of some sort there, aren't they? So, it's an industrial site. If it was to be improved, it would be beneficial.” (Ashington)*

One respondent commented that improvements to Humford Woods would be beneficial, particularly as it is a popular area with a high number of visitors:

- *“I like Humford Woods. It's a nice area, it's a very popular area. So, I think that that's obviously going to be quite beneficial. You know, the improvements there. I dug some steps there years ago.” (Ashington)*

In terms of the proposed river restoration work to the River Lyne, the group felt that this was a worthwhile project, particularly in terms of improving water quality and wildlife and biodiversity.

As had been mentioned across groups in previous discussions, the group felt that it was important to strike a balance between making improvements to accessibility but to ensure areas don't become too busy with visitors.

- *“Small improvements to help local community access it.” (Ashington)*





- *“You've got to hit the fine line between making something accessible so you can get there and then to make it so that everybody can get their wheelchair access and all the rest. You want people to come to these places, but you don't want it to become so popular that it becomes like Tynemouth Beach and the whole country wants to go there.” (Ashington)*

When asked which proposed scheme they felt should be prioritised, there were mixed views amongst the group. The whole group recognised the need for a balance between what would benefit people and what would benefit the environment. Some respondents felt that their views on prioritisation would also depend on the cost of each project:

- *“If it wasn't going to cost very much and you got some certain gains from it, then yeah. The unfortunate thing is, once you start saying either this one or that one, then it's somewhat more difficult to choose.” (Ashington)*
- *“You got to look at each project on its merits. It's a difficult one. It depends on cost.” (Ashington)*

During the in-depth interview at this location, the respondent was in support of all of the proposed schemes in the local area and had no additional suggestions.

## Durham City

### Co-creating possible local improvements

The following suggestions were made by respondents in the Durham group:

- Better disabled access around Prebends Bridge in Durham centre and the surrounding area:
  - There is currently a very steep hill that comes down from the castle which can be difficult for less able people to access river walks.
  - Respondent suggested adding railings or additional safety precautions to improve accessibility.
- Reducing flood risk.
- More waste bins.
- More biodiversity in the area near the Radisson Blu Hotel in the centre.
  - Currently when you get to this point the vegetation stops and it is all concrete, so it would be nice to see more biodiversity/greenery in this area.



- Ensuring safety at Roker beach.
  - o When waves crash during a high tide they can reach over the barriers and may be a safety hazard for people walking in that area.
- Better signage on walking paths/areas throughout the whole of Durham.
- Dredging along the River Wear:
  - o Respondent said there is currently a lot of trees and dead branches and sent an image of this area:



- More facilities that utilise natural resources in the reservoir area of Western Durham County:
  - o For example, shooting range to attract people to the area.
- More signage about the local environment and historical facts in smaller areas to encourage people to visit areas, boost the economy in smaller towns and increase local knowledge:
  - o For example, in Horden, Peterlee, and Blackhall.
- Wider paths in areas such as near the Cuths residence (at the bottom of Bailey Prebends bridge) to improve disabled access.
- Removal of large branches and trees that get stuck in the river in central Durham:
  - o Concerns were expressed that these obstruct movement for the fish in the river.
- More signage in the city centre along river about what wildlife is around:
  - o This may also help to promote respect for the environment without harsh 'stop littering' signs.
- Education about rats and protection of their habitats and livelihood.
- Plans for more green spaces near river walks:



- Including wildflowers that attract pollinators to increase insect life.

## Proposed scheme feedback

When shown the map of proposed local schemes, the group were **generally in favour of all proposed schemes**. In particular, respondents were keen on both clearing debris and removing litter from the River Wear, particularly as this **had been mentioned by respondents earlier in the session**:

- *"I like the idea of cleaning debris from the river, definitely. Because obviously debris is in the river and the removal of litter that can just cause a wide range of problems for people and for wildlife. The way it looks can put people off and it can hurt animals and can kill animals and pollute the area and all this. So, I think just something little and simple like that can just do wonders." (Durham)*
- *"I second that. I think that obviously in an area, in the north of England having quite volatile weather at times, and in being a built-up area with very high trees, etc., the debris can often accumulate in the river. And you know, as X touched on, it can be damaging to wildlife as well as the human population. So, I think that one stood out to me." (Durham)*

One particular theme that came through in the Durham group unprompted was that Northumbrian Water **must ensure that improvements are monitored**:

- *"I think with everything that's been put on there, they're all good ideas. But I think what we could do with more is being able to have them monitored to know that there's litter, that there is debris, that these arrangements need to be put in place rather than waiting for somebody from the public to go 'Oh, by the way, this doesn't look right' - if we had some sort of monitoring system..."(Durham)*

When asked specifically about riverbank restoration around Durham World Heritage Site, respondents felt that it was particularly important to improve access in this area:

- *"Access for sure. I can't remember who was saying this, but there is very little accessibility to anyone potentially in a wheelchair or even anybody on crutches or something like that. There's loads of steep hills and steps and there's also cobblestones. And particularly when you have the winters when it's icy and cold, it's very easy to slip. I have witnessed many people breaking bones simply because there is nothing to hold on to as well. So yeah, access for sure. And, again, monitoring. I liked that idea when it was earlier mentioned, I think not just for things like debris or litter whether the stuff is being maintained, but also just so that people will know as well, whether for instance some paths are safe to go down, if there is ice, or if there's flooding or anything like that." (Durham)*



It was also suggested by the group that these improvements **could be achieved collaboratively**, for example with **local authorities and residents**. One suggestion was to **involve students in volunteering projects** and said that they themselves would be interested in getting involved in these.

## Stockton/Billingham

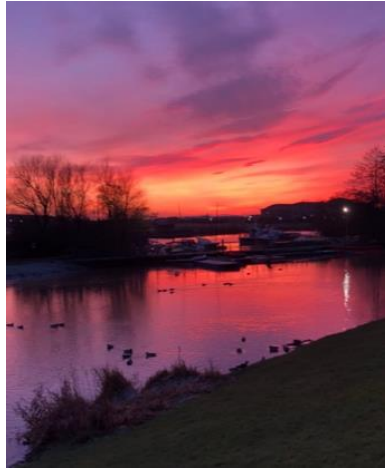
### Co-creating possible local improvements

The following suggestions were made by respondents in the Stockton/Billingham group:

- General maintenance and cleaning at Tees Barrage where water rafting takes place:
  - o There's a lot of rubbish in this area that could be cleared to attract more wildlife.
- Finishing off work that has been started at Six Fields (path next to Hartburn Bowling Club):
  - o A project was started at the reservoir but was never finished.
  - o Additionally, the area is dirty, and wildlife suffers with people going fishing in that area, using rat poison and hunting deer.
- Creating a beck similar to Billingham Beck in the park area of Salthome Reserve:
  - o This might attract visitors to the area.
- Maintenance of land at the South Gare:
  - o There's a lot of unkempt land that is unattractive.
  - o Improve safety infrastructure, as it can be dangerous.
  - o Clean stagnant oil from water (only on the left-hand side when you walk towards the beach).



In addition, the following image was sent in by a respondent in the Stockton/Billingham group of the Tees Barrage, to demonstrate the beauty of the area:



### Proposed scheme feedback

The group were then shown the map of proposed schemes in the local area. In relation to the proposed plans for toilet facilities and improved water quality at Hemlington Lake, one respondent stated that there was already a visitor centre at this location and felt that it would be more beneficial to invest in the facilities at Preston Park, particularly for the benefit of young families with children:

- *“There is already a centre there and I'm just thinking more about the people that live near that estate as it is very residential. But with the Preston Park, new facilities, it definitely does need new facilities. So that would be a really, really good idea. And again, from what X was saying about where she goes walking, it's in a really, really popular area. So, for young people, especially families with young children, having those facilities will be amazing, because at the moment, they're not very nice.” (Stockton/Billingham)*

One area included in potential schemes and also **identified by respondents in earlier unprompted discussion** was Tees Barrage. Across the group, respondents were **particularly keen on improvements suggested for this area** and felt that these improvements would benefit a large number of people in the local area.

- *“Improving that would be a great benefit to everybody in the local area. So, I think that's a good idea.” (Stockton/Billingham)*
- *“Yeah, definitely the Tees Barrage. I definitely agree with X that with the fish, I know that they did actually introduce it, but then they kind of dwindled away, I'm not quite sure what happened to them. I do feel like introducing wildlife back to like the Tees Barrage area would be really good.” (Stockton/Billingham)*



One respondent felt that Bassleton Beck stood out and felt that the creation of a footpath in this area would be useful and would benefit a lot of people who visit the area:

□ *“I think the Bassleton Beck one and stands out for me. I think creation of a footpath there would be really useful because I used to live in Ingleby, and a lot of people use that route. If it's foggy or not very nice weather, it's quite hard to walk on parts of it. And there's a big loop that you can go around, but a good chunk of that route is just a write off if the weather's bad. So, it's a shame because it's a nice local route for the people in that area. So that's a good one.” (Stockton/Billingham)*

One respondent also felt that Northumbrian Water could **learn from Cod Beck** which is a Yorkshire Water site, which was compared positively to other areas such as Bassleton Beck in terms of cleanliness and attractiveness.

In relation to the suggested improvements at Portrack Marsh (wetland habitat creation) some respondents also felt that Northumbrian Water could extend this to also look at repairing and maintaining the footpaths:

□ *“I feel like the footpaths are always quite waterlogged, no matter what time of year you're down there. So, this part where you go to New Park Bridge, there's a part where you take the Portrack Marshes and it's very muddy and then there's a section where there are some horses towards the New Park Bridge that takes another path round. I just feel like it's mucky - I wouldn't go down. You'd have to definitely be wearing wellies to go there. It's always quite mucky, and I know there is a little water section where the horses tend to be, I don't know if that's like damaging like the ground and the paths that were there. But there's no path there. There's nothing that's been made. It's more just like a mud track.” (Stockton/Billingham)*

There was also general consensus amongst the group that *any* work that could be done to increase wildlife and diversity in the area would be an improvement, as there was a general view that there isn't currently enough, particularly in terms of birds, seals, fish and rabbits.



## Seaham/Blackhall

### Co-creating possible local improvements

The following suggestions were made by respondents in the Seaham/Blackhall group:

- Better accessibility, parking and maintenance of paths at Hawthorne Beach:
  - o Steps down to the beach that are currently a safety hazard.
  - o Additional parking in area (people are currently parking on the road).
  - o Paths are overrun and churned up because they are overused.
- Ensure that the public are on board with developments, so they are less likely to negatively impact the areas.
- Adding a bird breeding area around Seaham/Blackhall Harbour.
- Preservation of area that runs through Hawthorn Dene (starting by the A19, through the Dene to the sea):
  - o Area should be cleaned regularly so there's no foul chemicals from the A19 garage or overspill on farmers' fields.
- More facilities at Crimdon Dene:
  - o Particularly additional car parking and toilet facilities.
- More waste bins at Noses Point.
- Maintenance and clear up of litter at Rock Dene:
  - o Currently this area is overflowing with litter.
  - o Additional signage would be useful for educational purposes (e.g. billboards with local wildlife information).
  - o Maintenance of paths, as these are currently slippery and a safety hazard.
- Clean Cassop Bogs:
  - o Currently next to a water treatment centre, which overflows and kills fish.



During the in-depth interview at this location, additional suggestions made by this respondent were:

- Addressing cliff erosion at Noses Point.
- Improving accessibility to Noses Point (particularly the steps leading down to the beach).
- More waste bins in and around Seaham.

### Proposed scheme feedback

When shown the map of proposed schemes, the group felt that the **proposed improvements to water quality at Crimdon were not necessary**, as accessibility was already good, and the area had had enough investment put into it previously:

- *"I think they would waste money at Crimdon because Crimdon has had so much money put into it and access. There's absolutely loads of access into Crimdon."* (Seaham/Blackhall)
- *"It would be silly spending any money on that. The caravan site just got the biggest car park ever and the car park out in the woods where the horses is, there's a lot of room."* (Seaham/Blackhall)

As Hawthorn Dene had **previously been mentioned** by one respondent, the proposed scheme of invasive species control in this area was received particularly well by this individual, who was also pleased to know that this had been mentioned by other customers/stakeholders previously:

- *"I mentioned that earlier on and seeing that invasive species control, I had completely forgotten, of course, that we do have a Himalayan balsam problem. It is good to see that being tackled, and all the things you mentioned. It's nice to know that some of the things we've been talking about, have also been mentioned by other people in your previous sessions. That's good to see."* (Seaham/Blackhall)

One respondent also suggested that improvements at Hawthorn Dene could also be expanded to include accessibility improvements, particularly parking. Additionally, one respondent felt that improvements to this area could be spread out to also include Nose's Point, as the two are interlinked. Again, the suggested focus was on parking and creating better links between the two areas:

- *"Access and parking to the Hawthorne Dene would be amazing, right? That would be great if somebody could do something about that."* (Seaham/Blackhall)
- *"I was just thinking as well, I know we've talked a lot about Hawthorne, but also like Nose's Point and Hawthorne are quite like interlinked. So maybe that's something that they could think about, like parking and access to, because I know, like X mentioned, Hawthorne is a*





*hidden gem and maybe making a car park would be a lot for that small space, so to interlink them a little bit more together, because they are quite closely connected.”*

*(Seaham/Blackhall)*

Other proposed schemes that were particularly well received by the group were water quality at Blast Beach and coastal footpath signage along Durham Coast.

During the in-depth interview at this location, the respondent was in support of all of the proposed schemes in the local area. This respondent suggested that NW could make additional improvements at Noses Point by making access safer and implementing signage to show where steps are steep.

## Framlingham/Saxmundham

### Co-creating possible local improvements

The following suggestions were made by respondents in the Framlingham/Saxmundham group:

- Add a boardwalk along the mere beside Framlingham/Saxmundham Castle to make it more accessible:
  - o This would allow for a circular route.
- Better accessibility at Aldeburgh:
  - o Particularly for less able people or people with pushchairs.
- Build a pier/pontoon that goes beside the water at Aldeburgh, to allow people to walk closer to the waterside.
- Better parking at Shingle Street:
  - o It's currently a single-track road so cars get stuck and can't turn around.

During the in-depth interview at this location, additional suggestions made by this respondent were:

- Resurfacing pathways around Snape Marshes.
- Replace seating around Snape Marshes as some seating areas are broken.
- Better accessibility at Aldeburgh, particularly for those who are less physically able (*please note this was also mentioned in the focus group*).



## Proposed scheme feedback

When presented with the map of proposed schemes, respondents were curious about what the suggested improvements were to Halesworth River, as one respondent commented that they already have a nice wildlife area there.

- *“I’m interested in the Halesworth one, because they’ve got a nice wildlife area in Halesworth. So, I wonder what the suggestions were for that. Perhaps the water quality is not so good, I don’t know about that.” (Framlingham/Saxmundham)*

In addition, some respondents commented about coastal erosion protection along Suffolk Coast and were **unsure what could be done to achieve this** other than something very substantial such as concrete blocks, which they felt would be unattractive:

- *“The problem is, I think with coastal erosion, the fact that any protection that you put up is not going to be invisible. It’s always going to involve things like big concrete blocks or you know, something substantial to stop it from happening, unless you’re going to build a seawall with a nice boardwalk across the top of it. So, if you know 200 yards, 300 yards out, which is going to take or two to three foot out from the coast. So, the wall takes the battering, but people can stand on top of the wall. So, the columns don’t see it. It’s always going to look ugly, isn’t it?” (Framlingham/Saxmundham)*
- *“It will be absolutely ruined if you started with big concrete.” (Framlingham/Saxmundham)*

In this group, respondents felt that they would need to see images of the suggestions so that they could visualise the area and suggest other aspects ESW should consider.

During the in-depth interview at this location, the respondent was in support of all the proposed schemes in the local area. This respondent was particularly keen on the suggested improvements to combat coastal erosion;

- *“That is a really important thing I think, it is a dangerous thing when debris falls down” (Framlingham in-depth)*



## Chelmsford

### Co-creating possible local improvements

The following suggestions were made by respondents in the Chelmsford group:

- Improvements to accessibility at Paper Mill Lock:
  - o Particularly parking and better footpaths.
- Reducing flood risk at the Meads.
- Introducing raised boardwalks at the Meads.
- Reducing flood risk at the Chelmer Valley Reserve:
  - o For example, by introducing raised boardwalks or an alternative pathway.
- Cleaning and dredging the river through town:
  - o Although respondents reported the river had improved lately, it was still considered dirty and this was noticeable to visitors to the area.
  - o One respondent suggested that restaurants that are situated alongside the river with outdoor seating could contribute towards the upkeep of the river itself.
- Maintenance of the nature viewing platforms at Hanningfield Reservoir:
  - o Particularly in terms of reducing litter/providing more bins.

### Proposed scheme feedback

When presented with the map of proposed schemes, the **suggested improvements to Hanningfield Reservoir were well received, particularly as this had been mentioned by the group earlier** in the discussion. One respondent commented that this was already a popular area so making improvements would be beneficial for many people, although this respondent also felt that it was important to ensure the area didn't get too busy:

- *“Hanningfield Reservoir, as it's an already existing popular site, it can only be good to improve it. As long as the access and the roads don't get too busy, because that area is really popular with cyclists and young kids on bikes and things. So as long as it's not driving too much traffic there, I think that could be a benefit.” (Chelmsford)*



Furthermore, the group were in favour of footpath improvements at Chelmer Navigation Route, and felt that this **would also incorporate their suggestion of better footpaths at Paper Mill Lock which was previously mentioned:**

□ *“I think that is Paper Mill. I think that's where we had our Paper Mill mark on our previous map.” (Chelmsford)*

As a whole, the group were **less familiar with Wickford Memorial Park and Dunton Pond**, so felt less able to comment on the proposed schemes at these areas. However, one respondent had recently visited Wickford Memorial Park and felt that it was important that better facilities (particularly toilets) were provided at this location, as it's a popular destination and covers a large area:

□ *“Definitely toilet wise. There's a lot of people that use the park, it is quite a big area and there were no toilets. We walked all the way around. That was an issue. I'm not sure if there were toilets that were locked or if there were just no toilets at all. I think there was a café there but obviously it wasn't open.” (Chelmsford)*

## Hornchurch/Upminster

### Co-creating possible local improvements

- Improvements to accessibility at Paper Mill Lock:
  - Particularly parking and better footpaths (*this was also mentioned by the Chelmsford group*).
  - A farmer is currently charging £5 for car parking, which is off-putting for visitors.
- Clean algae from river that goes through Corbets Tey.
- Clear litter from Hornchurch country park.
- Reduce flood risk at Hornchurch country park lake.
- Clean the area opposite the Queens Theatre, Langtons Hall:
  - It was considered a positive thing that there is lots of wildlife in the area, but customers felt it needs to be cleaned.
- Better accessibility and more facilities at Raphael Park:
  - Particularly the addition of more parking.




- Need to clean water in Dagenham park (Arkin Park):
  - o Water looks toxic and unsafe.
- Better parking at Hainaut Country Park.
- More educational activities for children, for example a 'Peter Rabbit' trail to engage children.

During the two in-depth interviews at this location, additional suggestions were:


- Improvements to water quality at Harrow Lodge Park in Hornchurch.
- Reducing pathway flooding along Ingrebourne River.
- Clean water at Raphael Park (there has been a previous issue with sewerage which has had an impact on water quality and smell).

### Proposed scheme feedback

When asked about the proposed schemes within the area, the group **were particularly keen on the suggested improvements to wildlife and water quality in Hornchurch Park, particularly as this area had been mentioned in the previous discussions:**

 *"I think the water quality with the Hornchurch Park one, in terms of water quality is an especially good idea because there's always filth which ends up at the Hornchurch end."  
(Hornchurch/Upminster)*

One respondent also mentioned the proposed scheme at the river Thames but was unsure whether this was an area that Essex & Suffolk would be responsible for. This was clarified by the ESW representative. The group felt that improvements to that area would be beneficial and that investment is needed in terms of water quality as well as other aspects such as facilities:

 *"That whole area just needs investment, whether it be for the water quality, or what's down there, and there isn't much, it's mostly why there isn't much. But anyway, that's why you only really go there on a huge bike ride." (Hornchurch/Upminster)*

The proposed improvements to Bedford Park were also raised by the group, particularly in relation to the volunteer project which was considered very positive. One respondent felt that the volunteer project should become more widespread and more talked about so that a greater number of people could become involved. This finding aligns with feedback provided by survey respondents, who felt that local people would be interested in getting involved and voluntarily supporting in delivering improvements:



- *“I was going to say the interesting one about that one is the volunteer project, which is what I mentioned before, which I think should become more public, because actually, I think, especially under current circumstances, that more people would be really willing to get involved. So, I think it's really good. It's free labour, and it also gets people out with nature. So, it can clear up parks, it can help with, you know, water systems, because sometimes I'm guessing with a lot of these projects, it's not necessarily massive scale. In some things, it's volume of people needing to do things. I think volunteer projects is a really good thing and should be a bit more widespread.” (Hornchurch/Upminster)*
- *“I think that's a really good idea. I think there's not enough of community involvement in projects. And I think that would be really helpful and helpful towards community awareness.” (Hornchurch/Upminster)*

During the in-depth interviews at this location, respondents were in support of all the proposed schemes in the local area. One respondent commented that some proposed schemes appeared to be around water quality and assumed that Essex & Suffolk Water must be aware that this is an issue within the local area. This could therefore be something to consider in terms of future communications around improvements to water quality.

- *“A lot of them are saying about water quality, so obviously that is a main issue, but they've obviously noted it and know there's an issue there” (Hornchurch/Upminster in-depth)*



## Monitoring improvements

Across all focus groups and in-depth interviews, respondents highly valued NW/ESW making investments with the aim of improving water environments for the benefit of customers.

In addition, most respondents felt that it was highly important to ensure that NW/ESW monitor the changes they make on an ongoing basis, and to convey these to members of the public. Across the groups and in-depths, the benefit of monitoring changes was to ensure that changes had been successful, and targets met.

There were several different suggestions about how NW/ESW could keep members of the public up to date and be transparent with improvements/maintenance, for example via social media, by sharing Key Performance Indicators on their websites, within their annual report, within local newspapers and by including information within water bills. For those who mentioned that it would be a good idea to include information within the bill, these respondents said that they would read this information after this was explored by facilitators:

- *“I think when I get my water bill through the post, every year, I'd like to see, as part of your water bill, ‘We've done this in this region.’ That's what the public wants, and surely that's what Northumbrian Water want.” (Ashington)*
- *“It wouldn't cost that much money. You only need a Facebook group or a Twitter or something like that. It's really easy to get stuff out on social, you know, if people are interested in what's going on.” (Framlingham/Saxmundham)*
- *“Engage the local community and volunteer wardens to report back.” (Seaham/Blackhall)*
- *“I mean if they promote themselves more on social media, Instagram, Facebook, the community will be more and more wanting to get involved, because I would like to do a beach clean-up.” (Seaham/Blackhall)*
- *“Local newspapers could be an option. Because people that would be interested in the environment in the community are more likely to read the Romford Recorder, for example. And if there was a column or something in there that mentioned what happened, they might take interest in that.” (Hornchurch/Upminster)*
- *“Absolutely - it needs to go in their annual report.” (Framlingham/Saxmundham)*

As well as monitoring the changes they make and making the public aware of these, the majority of groups mentioned that NW/ESW continue to upkeep and maintain any improvements that are made to ensure that efforts aren't lost over time and to maximise cost-benefit:



- *“That seems like a sensible thing to do. If you don't monitor it, how do you know it's been effective?” (Alston)*
- *“Otherwise, it's a waste of an investment, if you just put the money in it initially, and then leave it to do its own thing. And then people don't go there, then this is a false economy. I think it needs an ongoing investment.” (Chelmsford)*
- *“If they're putting all this money in to get a project ready to be used, then to me, you can't just then leave it and not follow up and keep on top of the maintenance of it.” (Ashington)*
- *“Yeah. Conversely, if they don't monitor it, it's a bit of a waste of money.”  
(Seaham/Blackhall)*

One respondent in the Seaham/Blackhall group, however, was concerned about the impact that this might have on customers' bills, and so felt that NW/ESW would need to strike a balance so that customers bills aren't too heavily impacted.

- *“I think, yes, but not over monitoring it because then I'll increase their costs and pass it on to the customers as well. And yeah, but it's pointless not monitoring, if you know what I mean.”  
(Seaham/Blackhall)*





## How ambitious should NW/ESW be with this programme? (Phase 1)

All survey respondents next watched a short video (see Appendix 5), which detailed how customers' bills could be impacted by the proposed programme and the extent of ambition pursued. Please note, for those who completed the survey via telephone, respondents were required to watch the video and/or read a transcript before completing the survey.

All respondents were also asked to consider the following information (which was developed collaboratively between NWG and Explain) when completing questions in this section;

- *The **average** bill for a Northumbrian Water / Essex & Suffolk Water customer is £305 / £205 each year;*
- *Northumbrian Water / Essex & Suffolk Water could exceed any of the other 49 targets in their business plan and earn a reward on any of them which would increase customers' bills too. The maximum bill customers could pay is £335 (NW) / £225 (ESW);*
- *Your other household bills may go up or down between now and 2025, affecting the amount of money you must spend in general;*
- *Your household income and expenses might change between now and 2025, so please be mindful of your overall financial situation when making your decisions;*
- *If customers were willing to pay an extra 90p/ 44p each year on their water / water and waste water bill each year, Northumbrian Water / Essex & Suffolk Water could make improvements to around 200km of water environments. 200km is around 124 miles which is around the driving distance between Alnwick and York (NW) / Birmingham and London (ESW).*
- *If customers were willing to pay an extra £1.80 / £88p each on their water / water and waste water bill each year, Northumbrian Water / Essex & Suffolk Water could make improvements to around 400km of water environments. 400km is around 228 miles which is around the driving distance between Alnwick and York (NW) / Birmingham and London (ESW) and back again.*
- *Northumbrian Water / Essex & Suffolk Water may conduct other research to understand whether customers are willing to pay for improvements to other aspects of service too.*



All survey respondents were then asked a series of questions regarding indicative willingness to pay. Please note, as the questions are focused on paying more, the results here primarily focus on the views of bill payers (customers).

Keep in mind when considering the results that CCWater set a threshold of acceptability of 70-75% at PR14 - a level NWG set out to maintain during PR19 as a benchmark of acceptance for the 2020-25 business plan.

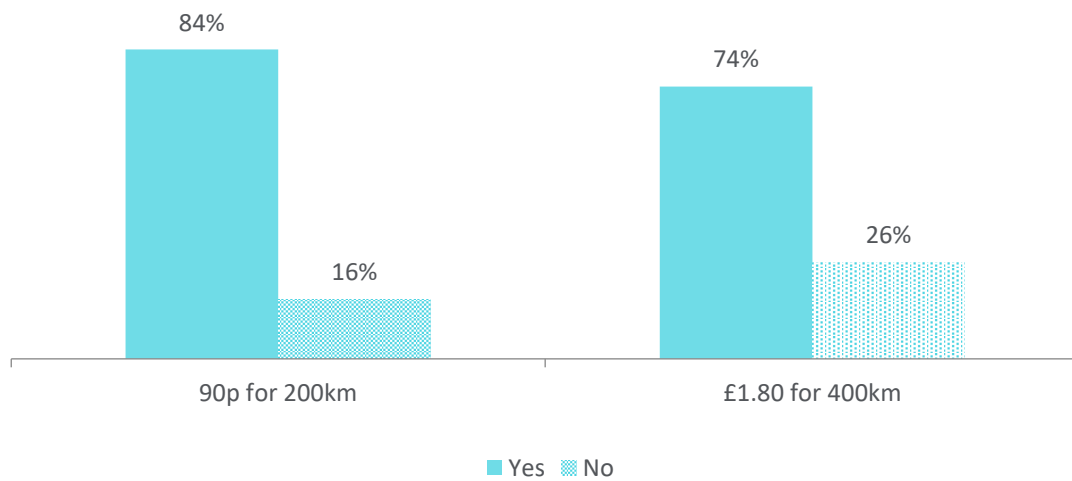
It is important to note, however, that the following questions were asked in isolation any other improvements which may have an impact on customers' bill and therefore this should be taken into account when interpreting the following results.

### Willingness to pay more [NW]

All survey respondents were first asked whether they would be willing to pay more on their water bill (90p/44p) to allow NW/ESW to make improvements to 200km of water environments, then were asked if they would be willing to pay an extra £1.80/88p on their bill to allow NW/ESW to make improvements to 400km.

84% of NW bill payers said that they would be willing to pay an extra 90p to allow NW to make improvements to 200km of water environments, while 74% were willing to pay £1.80 more. Both meet CCWater's 70-75% acceptability threshold.

Between 2020 and 2025, would you be willing to pay an extra 90p/180p each year on your water and waste water bill to allow NW to make improvements to 200km/400km of water environments? [NW bill payers only, weighted, base 360-389]



Willingness to pay 90p more was higher amongst non-bill payers (91%) compared to current bill payers (84%), and willingness was also higher amongst non-bill payers (83%) than bill payers (74%) to pay £1.80 more for greater ambition in the Programme.

When considering differences by demographic groups:

- NW bill payers aged 18-29 were statistically the least likely to be willing to pay more on their bill (73% yes for 90p and 63% for £1.80), while bill payers aged 30-49 were the most likely to be willing (86% for 90p and 77% for £1.80).
- Similar proportions of male and female bill payers expressed willingness to pay more on their bills (both 90p and £1.80 values).
- Those bill payers with children over the age of 18 living at home were significantly more likely to be willing to pay more on their bill than those with no children (93% for 90p and 84% for £1.80, compared to 80% for 90p and 65% for £1.80).
- No significant differences were found in willingness to pay between those in SEG ABC1 and those in SEG C2DE.

When looking at the responses by respondents' concerns (including their personal finances, the impact of COVID-19, and wildlife in their local area):

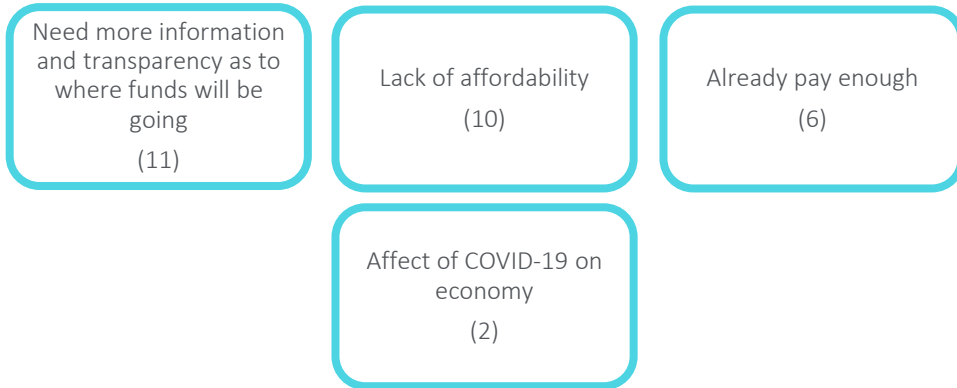
- More NW bill payers who were 'not at all concerned' about their personal finances were willing to pay an extra 90p per year (91%) however even amongst those who were 'very concerned,' a majority were willing to pay this amount more on their bill (80%).
- There was limited difference in willingness to pay more amongst those who were not concerned vs those who were concerned about wildlife and habitats in their local area. 83% of those who were 'very concerned' were willing to pay an extra 90p per year, compared to 89% amongst those who were 'not at all concerned.' (Note that the base size of those who were 'not at all concerned' was small at 18 people vs. base of 112 who were 'very concerned'.)
- Those who were 'very concerned' about climate change were significantly more likely to be willing to pay £1.80 more on their bill (79%) than those who were 'not very concerned' (57%) or 'not at all concerned' (70%).
- Concern about their personal finances, and about wildlife and habitats in their local area, did not have a significant impact on NW respondents' willingness to pay an additional £1.80 on their bills – willingness was fairly consistent across all segments.



- No significant differences were found in willingness to pay between those in SEG ABC1 and those in SEG C2DE.



All respondents were asked why they voted the way that they did in an open question. For those who answered that they would not be willing to pay **90p** extra, themes amongst NW respondents were:



- "I don't trust this approach." (NW bill payer)*
- "I'm not in a financial position to give an opinion to be truthful." (NW bill payer)*
- "I already pay enough for my water and have no idea where it goes." (NW bill payer)*

For those who answered that they would be willing to pay **90p** extra, themes amongst NW respondents were:

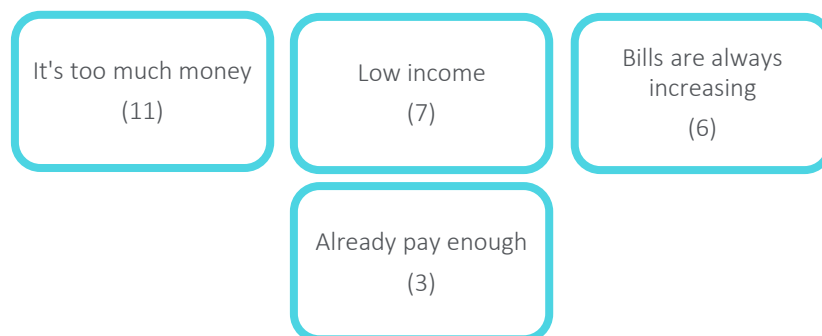


- "90 pence a year is nothing to pay to improve our local environment which would benefit everyone." (NW bill payer)*
- "It sounds like great value for money for the benefits it would bring to the area." (NW bill payer)*



- *“It should benefit a variety of people who are interested in nature, walking, boating and angling. This should include improved walkways, water access and artificial habitats to encourage wildlife and birds. I am not so keen on visitor centres playgrounds etc. Keep it natural.” (NW bill payer)*
- *“Very! It seems a small price to pay for all the suggested ideas which will benefit everyone long term. Getting people out and about in our glorious countryside and coastline would have so many benefits - especially after COVID-19. Mental and physical health benefits etc.” (NW bill payer)*
- *“We all need to take responsibility for the environment. If only 50km is improved as opposed to say, 200km it will take too long to make those improvements. We need to act now!” (NW bill payer)*

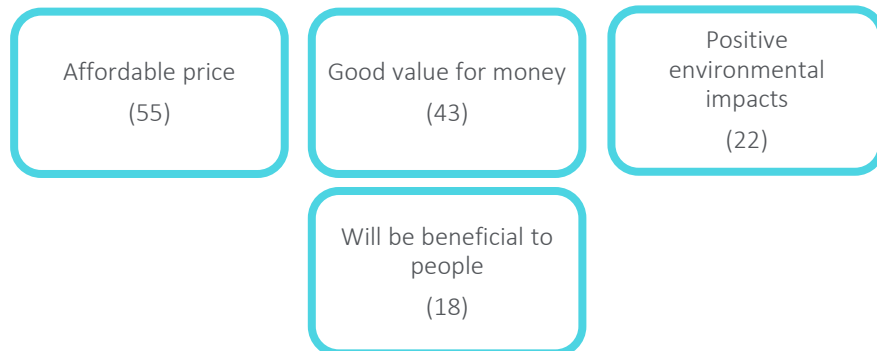
For those who answered that they would not be willing to pay **£1.80** extra, themes amongst NW respondents were:



- *“I think they should not ask too much from their costumers as asking too much will put them off the idea.” (NW bill payer)*
- *“Many households are being over-charged. Why should we pay more again?” (NW bill payer)*
- *“Think we pay enough for our water.” (NW bill payer)*
- *“If other household bills go up I may struggle to afford to pay it, especially as I am expecting a pay freeze due to the COVID-19 costs.” (NW bill payer)*



For those who answered that they would be willing to pay **£1.80** more, themes amongst NW respondents were:

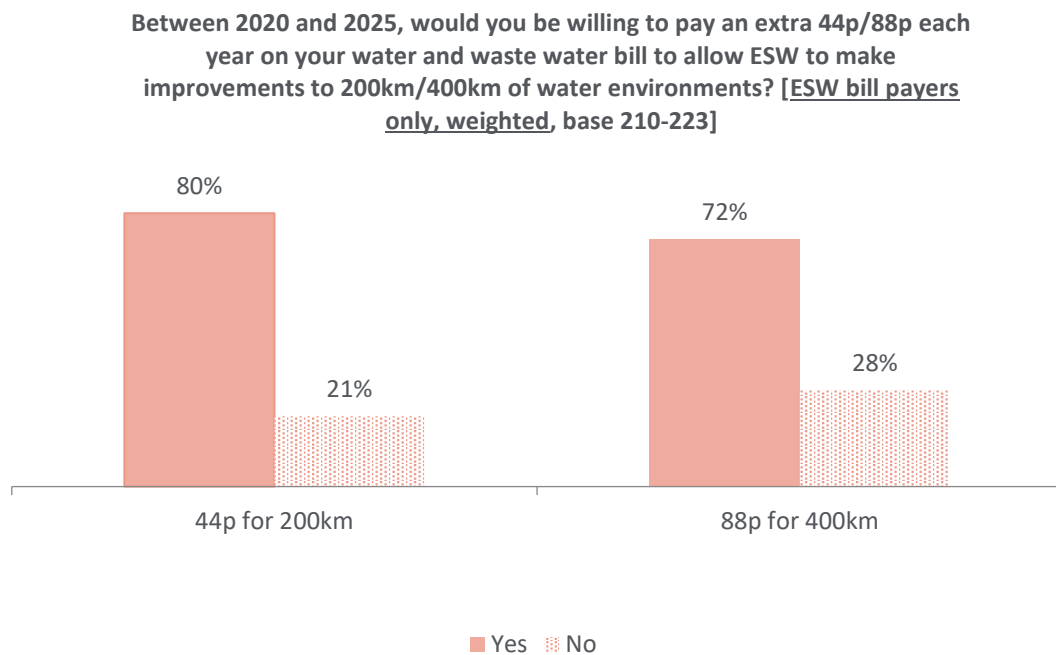


- "It's a very small amount and very worth the investment." (NW bill payer)*
- "Yes, £1.80 is good value for the proposed returns." (NW bill payer)*
- "As explained before, if I can help the environment I will." (NW bill payer)*
- "Again, not everyone can afford this but those who can should." (NW bill payer)*
- "It would be beneficial to all concerned!" (NW bill payer)*



## Willingness to pay more [ESW]

In addition, 80% of ESW customers stated that they would be willing to pay an extra 44p on their water bill to allow ESW to make improvements to 200km of water environments, and 72% were willing to pay 88p more for even greater ambition to improve 400km. Again, both meet CCWater's 70-75% acceptability threshold.



When considering differences by demographic groups:

- There were no significant differences in willingness between age groups amongst ESW bill payers.
- A higher proportion of female bill payers were willing to pay more on their bill than male (both 44p and 88p values), but these differences weren't statistically significant.
- Conversely compared to NW, bill payers in ESW with children over the age of 18 living at home were the group least likely to be willing to pay more on their bills (71% for 44p and 67% for 88p).
- No significant differences were found in willingness to pay between those in SEG ABC1 and those in SEG C2DE.

Looking at the responses in relation to an additional 44p by customers' personal concerns and attitudes:





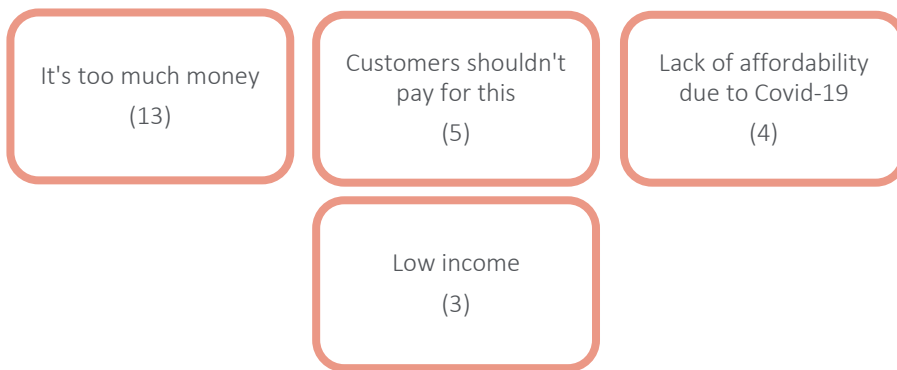
- Surprisingly, bill payers who were 'very concerned' about their personal finances were more likely to be willing to pay 44p more on their bill, compared to those who were 'not at all concerned' about their personal finances (83% vs. 71%).
- Bill payers who reported they were concerned about climate change were significantly more likely to be willing to pay 44p more on their bill (83%) than those who were not concerned about this (39%).
- Bill payers who were 'very concerned' about wildlife and habitats in their local area were more likely to be willing to pay 44p more on their bill (91%) than those with any other level of concern (76% for 'slightly concerned', 74% for 'not very concerned').

When looking at the responses in relation to the 88p addition by customers' concerns:

- There was limited difference in willingness to pay 88p more amongst those who were not concerned vs. those who were concerned about their personal finances.
- Bill payers who were 'very concerned' about climate change were more likely to be willing to pay 88p more on their bill (78%) compared to those who were 'not very concerned' (71%) or 'not at all concerned' (30%), although this comparison is made cautiously as nearly half of respondents were 'very concerned' and only a small minority were 'not at all concerned.' Therefore, base sizes differ.
- Similarly, ESW bill payers who were 'very concerned' about wildlife and local habitats were more likely to be willing to pay 88p more (87%) compared to those who were 'slightly concerned' (64%) or 'not very concerned' (67%).
- No significant differences were found in willingness to pay between those in SEG ABC1 and those in SEG C2DE.

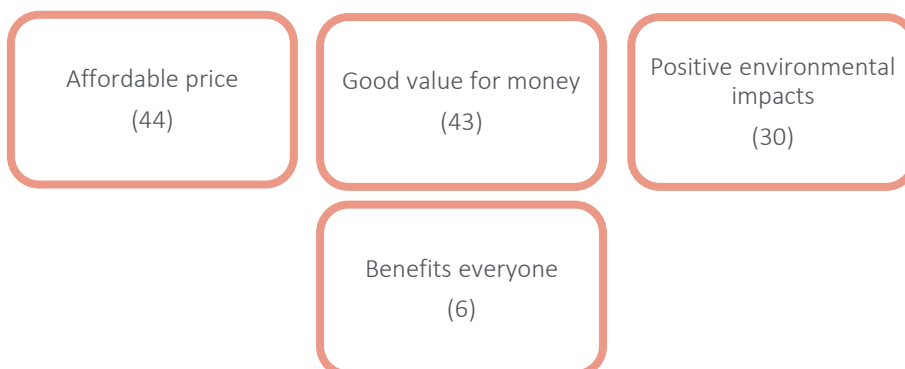


Themes amongst ESW respondents who said that they would not be willing to pay **44p** extra were:



- *"Because they should fund for it instead of making everyone else always pay for it." (ESW bill payer)*
- *"With Covid-19 and Brexit, people can't afford any price increases. If this project can't be delivered within existing budgets, it needs to be delayed until the financial environment improves." (ESW bill payer)*
- *"I already pay £858 a year, which appears to be well above the average water bill of £245." (ESW bill payer)*

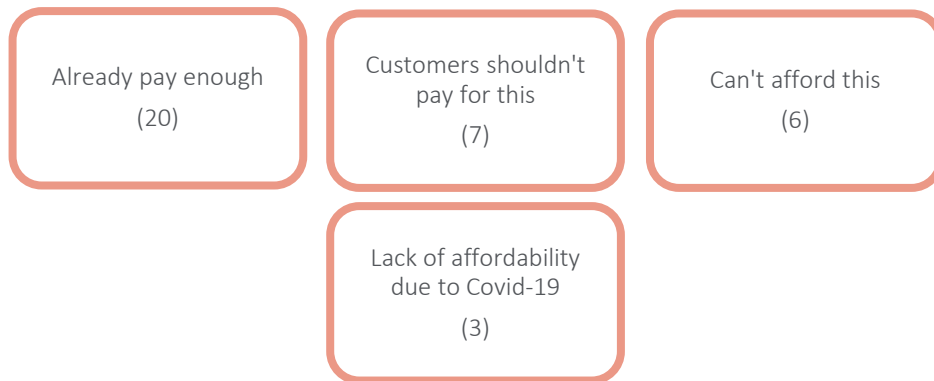
Themes amongst ESW respondents who were willing to pay **44p** extra were:



- *"I'm happy to pay a little extra if it means ESW improve the water environment and conservation in and around streams, rivers, lakes, etc." (ESW bill payer)*
- *"It's only just a small increase. Well worth it for the amount they have promised to undertake." (ESW bill payer)*

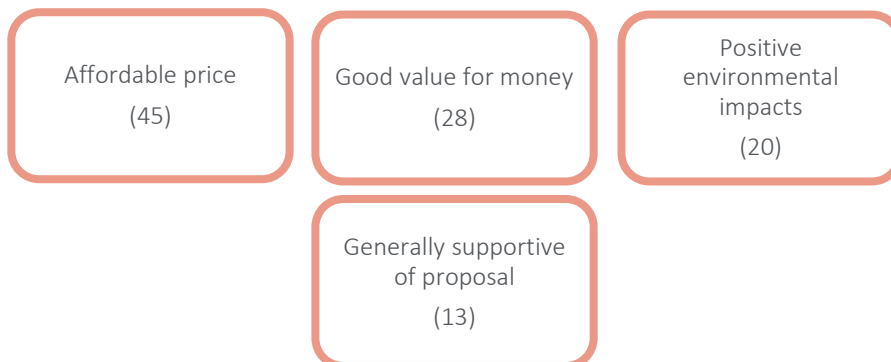


Themes amongst ESW respondents who said that they would not be willing to pay **88p** extra were:



- *"Because it's unfair on us to increase the price." (ESW bill payer)*
- *"My current financial situation is not good due to COVID-19." (ESW bill payer)*
- *"Why do managers seem to expect people with low incomes to cope with demands on the poorest in this country?" (ESW bill payer)*

Themes amongst ESW respondents who were willing to pay **88p** more were:

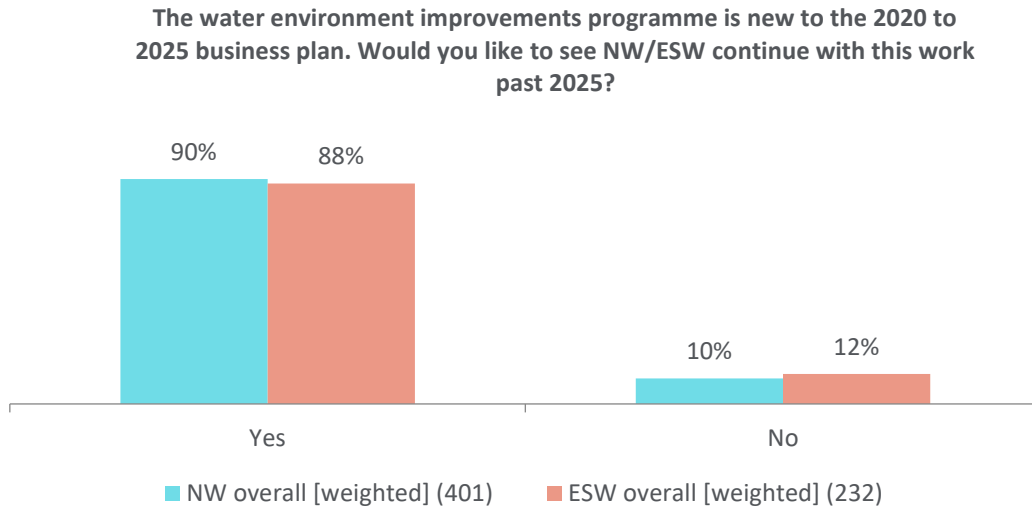


- *"Although this is a rise, the outcome will be more than worth it for thousands of people." (ESW bill payer)*
- *"It's still not that much of an amount, but it could make a big difference." (ESW bill payer)*
- *"Improving the ecosystem is vital to help counter the effects of global warming." (ESW bill payer)*



## Desire to see the programme continue past 2025

All survey respondents were then asked whether they would like to see NW/ESW continue their work to improve water environments past 2025. Across all respondents, there was a high level of support for continuing this work past 2025. Overall, 90% of NW respondents wanted to see the work continue past 2025, as did 88% of ESW respondents.



When looking at responses by respondents' concerns, those who were 'slightly' (89%) or 'very' (93%) concerned were more likely to want this work to continue past 2025 than those who were 'not at all' (64%) or 'not very concerned' (85%).

When reviewing results by SEG, there were no significant differences in terms of levels of support for this work to continue past 2025.

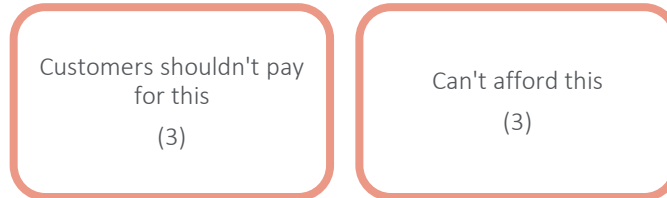
All respondents were asked why they voted the way that they did in a follow up open question. For those who answered that they did not want to see this work continue past 2025, themes amongst NW respondents were:

- I'm still not sure about it (6)
- Due to the financial impact (3)
- I don't agree with it (2)



- ❏ *"Too expensive." (NW bill payer)*
- ❏ *"I don't agree with it." (NW bill payer)*

For those who answered that they did not want to see this work continue past 2025, key themes amongst ESW respondents were:



- ❏ *"It's too expensive." (ESW bill payer)*
- ❏ *"Profit before service. If you want to become a charity give up the water business." (ESW bill payer)*
- ❏ *"Money is tight." (ESW bill payer)*

For those who answered that they wanted the work to continue after 2025, themes were:



- ❏ *"Assuming that the current business plan proves a success, then the work should continue. If it is not successful, the improvements should continue but control should be passed to other interested parties." (NW bill payer)*
- ❏ *"The projects need to be long term with short term milestones to keep the population engaged." (NW bill payer)*
- ❏ *"I would want NW to keep looking after water environments for future generations." (NW bill payer)*



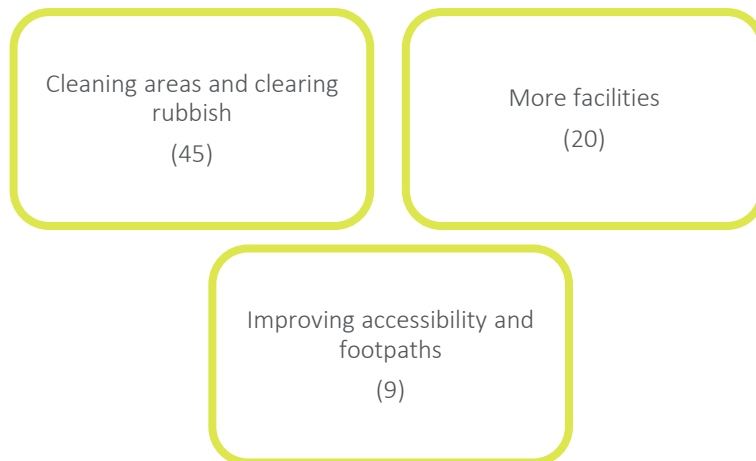
- *“Improvements need to be an ongoing thing, especially for wildlife.” (ESW bill payer)*
- *“Five years is a good start, but the work never stops and there will always be improvements to be made. This should therefore be a long-term project.” (ESW bill payer)*

## Improvement site suggestions

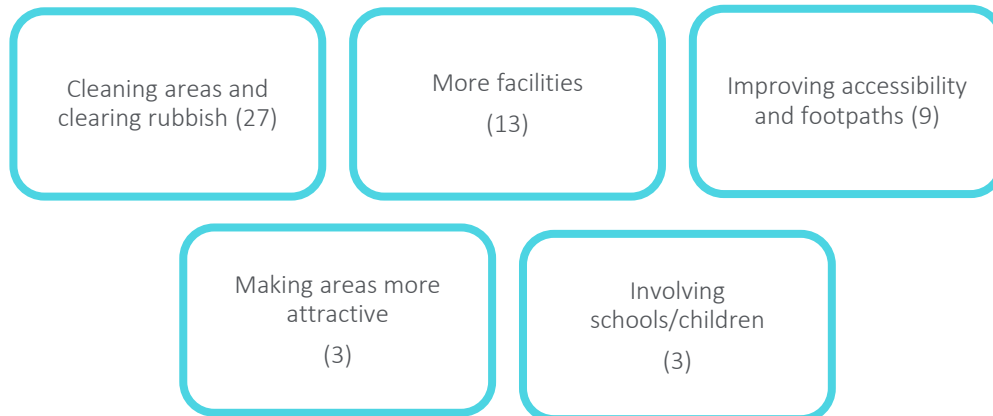
In a single choice closed question, all survey respondents were then asked whether there were any water environments that they would suggest that NW/ESW should consider including in their Water Environments Improvement programme. Overall, 17% respondents (138 people) answered ‘yes’ to this question and were subsequently asked where they would suggest and what improvements they would like to see there in two follow up open questions.

For this question, 72 specific locations were suggested, with a full breakdown of this provided separately to this report as raw data.

Themes amongst respondents overall included:



Some themes observed across suggestions for specific locations included the following amongst NW respondents:



- *“My eldest son is a sea scout using the river in Morpeth and the coastline. It would be great to see some community links between the two, so the children could understand the effort that you put in to keep their environment clean and safe, and also they could offer their ideas for improvements - Morpeth.” (NW bill payer)*
- *“Clearing out of the tributaries that feed the lake, as they are full of rubbish that is turning the water stagnant. Public toilets would be an asset as well – Hemlington Lake.” (NW bill payer)*
- *“Cleaning rubbish, signage and media coverage. South Tyneside Council already give a small grant to help look after it which volunteers use, but it could do with more support - The river Don.” (NW bill payer)*
- *“Better / safer footpath put in, as some parts are extremely steep and slippy. Less litter around the river and in the river, more wildlife- Humford woods and the woods through to Cramlington.” (NW bill payer)*



Some themes observed across suggestions for specific locations included the following amongst ESW respondents:



- *"1. Doing whatever is necessary to encourage water voles, wildflowers and waterfowl habitats. 2. Clearing it of rubbish which is often fly-tipped there, especially from The Factory Shop car park in Purdey's Industrial Estate which is open to Prittle Brook- 1. The River Roach from Rochford town centre to where it joins the River Crouch. 2. Prittle Brook from Sutton Ford where it joins the River Roach."* (ESW bill payer)
- *"Make it cleaner and more accessible - Lound Lakes."* (ESW bill payer)
- *"Benches, signs to show which way takes you where, picnic area and toilets - The Broads at North Cove."* (ESW bill payer)
- *"Dredging the river and clearing the waterway of invasive weeds and rubbish - Halesworth river."* (ESW bill payer)





## Perceptions of NW/ESW

At the start of the survey, following explanation of NW/ESW's role, all survey respondents were asked how they would rate their overall perception of NW/ESW in a single coded question. Most respondents (64%) had a 'positive' or 'very positive' perception at the start of the survey. A higher percentage of NW bill payers (70%) had a 'positive' or 'very positive' perception of NW than ESW bill payers did of ESW (59%). Similarly, a higher percentage of NW non-bill payers (53%) had a 'positive' or 'very positive' perception of NW than ESW non-bill payers did of ESW (40%).

All respondents were asked to rate how satisfied they were with NW/ESW on a scale of 0 to 10. A mean satisfaction score of 7.5 was observed overall, with the highest mean score observed amongst NW bill payers (7.7) and the lowest amongst ESW non-bill payers (6.8).

To understand Net Promoter Scores (NPS) in each area, all respondents were asked how likely they would be to recommend NW/ESW to a friend or colleague on a scale from 0 to 10, where 0 is 'not at all likely' and 10 is 'extremely likely', per standardised NPS wording.

Net promoter is calculated by first grouping responses into promoters (9-10), passives (7-8) and detractors (0-6). Promoters are loyal enthusiasts, while passives are typically considered to be satisfied but unenthusiastic and vulnerable to competitive offerings (where these exist) and detractors are unhappy customers.

NPS scores are calculated as follows:



Overall, an opening NPS score of -2 was observed. Amongst NW bill payers, a score of +10 was observed, with a score of -9 observed amongst NW non-bill payers. Amongst ESW bill payers, a score of -10 was observed, with a score of -53 observed amongst ESW non-bill payers.



To understand whether respondents' views had changed after being better informed about NW/ESW and the Water Environment Improvements Programme, at the end of the survey, all respondents were asked the same three perception, satisfaction and NPS questions that were asked at the very start of the survey. Results for pre vs. post responses are shown below.

Overall, more respondents said that they would rate their perception of NW/ESW as either 'positive' or 'very positive' at the end of the survey (80%) than they did at the start (64%).

	Overall [weighted]		NW Bill payers [unweighted]		ESW Bill payers [unweighted]		NW non-bill payers [unweighted]		ESW non-bill payers [unweighted]	
	Pre (782)	Post (799)	Pre (424)	Post (428)	Pre (235)	Post (240)	Pre (73)	Post (77)	Pre (50)	Post (54)
<b>Very negative</b>	1%	<b>1%</b>	0.2%	<b>0.2%</b>	2%	<b>2%</b>	4%	<b>0%</b>	2%	<b>6%</b>
<b>Negative</b>	3%	<b>3%</b>	3%	<b>4%</b>	2%	<b>3%</b>	12%	<b>0%</b>	2%	<b>2%</b>
<b>Neither negative or positive</b>	32%	<b>17%</b>	27%	<b>15%</b>	37%	<b>19%</b>	30%	<b>19%</b>	56%	<b>30%</b>
<b>Positive</b>	39%	<b>41%</b>	39%	<b>36%</b>	39%	<b>47%</b>	34%	<b>47%</b>	36%	<b>50%</b>
<b>Very positive</b>	25%	<b>39%</b>	31%	<b>46%</b>	20%	<b>30%</b>	19%	<b>30%</b>	4%	<b>13%</b>

In addition, mean satisfaction scores overall and across each respondent type increased after completing the survey and learning about the programme. Overall mean satisfaction scores increased by 0.4, from 7.5 to 7.9.

	Overall [weighted]		NW Bill payers [unweighted]		ESW Bill payers [unweighted]		NW non-bill payers [unweighted]		ESW non-bill payers [unweighted]	
	Pre (788)	Post (797)	Pre (428)	Post (430)	Pre (233)	Post (236)	Pre (75)	Post (78)	Pre (52)	Post (53)
<b>Mean score</b>	7.5	<b>7.9</b>	7.7	<b>8.0</b>	7.3	<b>7.7</b>	7.6	<b>8.2</b>	6.8	<b>7.0</b>

Increases pre and post survey were seen across all age groups. The broad trend in satisfaction with NW/ESW between age groups was that satisfaction was greater amongst the older age groups, but satisfaction did still increase for the youngest between the start and end of the survey; there was a mean satisfaction score of 7.0 from 18-29 year-olds at the start of the survey and this was 7.3 at the end, demonstrating that this deliberative education did positively impact their satisfaction with the organisation.



Finally, all NPS scores provided also increased after completing the survey. Overall NPS increased by 15, from -2 to 13.

	Overall [weighted]		NW Bill payers [unweighted]		ESW Bill payers [unweighted]		NW non-bill payers [unweighted]		ESW non-bill payers [unweighted]	
	Pre (787)	Post (792)	Pre (427)	Post (428)	Pre (232)	Post (233)	Pre (75)	Post (77)	Pre (53)	Post (54)
<b>NPS</b>	-2	<b>+13</b>	+10	<b>+23</b>	-10	<b>+2</b>	-9	<b>+29</b>	-53	<b>-35</b>

NPS did differ between age groups; amongst 18-29 year-olds, NPS was +3 following completion of the survey, compared to +19 amongst the 70 and over age group and +11 amongst 50-69 year-olds.

It is worth noting that we are aware that the NPS scores gathered in this research are lower than those gathered in other pieces of research conducted by NWG, such as their Domestic Tracking survey (for example, an overall score of +42.3 for Q4 2020). There are some factors which likely contribute to the lower scores seen here, to be considered when comparing these results:

- The pure telephone method employed in the Domestic tracking versus a predominantly online method used here has a big impact on NPS because in a telephone survey interviewers can remind respondents that this question is hypothetical (i.e. you can't choose at the moment but if you could...), which can't be clarified as strongly in a self-completion online survey, though we did include wording within the Water Environments survey to try and combat this. There will likely be a proportion of detractors who are considering the question from the point of view of not currently being able to choose their water company.
- It can be seen that the overall NPS is impacted in part by non-bill payers, who are naturally going to have a lower likelihood to recommend NWG as they have no relationship with the company at the moment.
- From previous experience of conducting the Domestic tracking research, the Domestic respondent sample tends to have an older skew because quotas are set on ACORN type; older customers are generally more satisfied (seen in the age group comparison noted above) and have more experiences to base their scores on. The sample here is more representative including younger age groups.



The results from all perception questions indicate that educating local people about the Improvement Programme, and involving them in it, may be important to improve satisfaction, perception of NW/ESW and drive a more positive NPS, ultimately supporting stronger brand engagement amongst current and non-bill payers.





# Conclusions and recommendations

A holistic review of the actionable insights.

# Conclusions and recommendations

## Conclusions

A summary of the key conclusions from the research programme can be found below

### Use of Water Environments

- More than 40% of survey respondents visited water environments at least monthly. 12% rarely or never visited any. More visited rivers (42%) and the coast (41%) than streams (36%) or lakes/reservoirs (24%).
  - o When reviewing results by SEG, those in SEG ABC1 were significantly more likely to attend both rivers and streams than those in groups ABC1.
- ESW respondents were more likely to visit lakes and reservoirs more frequently (21% of ESW respondents visited lakes or reservoirs between daily and 2 to 3 times a month, compared to 13% of NW respondents).
- NW respondents were slightly more likely to visit coasts and beaches more frequently (13% visited at least once a week compared to 10% amongst ESW respondents).
- The most commonly cited reasons for visiting water environments among all respondents were general walking, dog walking, exercise and to access the sea or paddle. Some respondents also visited water environments to spend time with friends/family or for wellbeing/relaxation, with respondents finding being around water peaceful and relaxing.
- Most respondents were satisfied with the last water environment they visited (56-79%, depending on the type of environment).
  - o When reviewing results by SEG, there were no significant differences in satisfaction between SEG groups.

### Levels of concern (survey only)

- Respondents were asked to rate how concerned they were about various pre-selected topics, and levels of concern were compared.

- The largest concern was about the impact of COVID-19 on the UK economy, with 93% concerned (slightly or very), and 90% felt this way about its effect on their region.
- The next highest concern was climate change (81% either slightly or very concerned) and wildlife and habitats in their local area (77%). Interestingly, these environmental issues were of more concern than their personal health and wellbeing (71%) and personal finances (56%).
- Most participants were concerned about the environmental issues mentioned, with only 5% unconcerned about climate change and 7% unconcerned about wildlife and habitats in their local area.
- When reviewing results by socio-economic group (SEG), those in SEG C2DE were significantly more likely to state that they were 'very concerned' about personal finances than those in SEG ABC1 (27%). In addition, those in SEG C2DE were significantly more likely to state that they were 'very concerned' about wildlife and habitats in their local area than those in SEG ABC1 (27%).

## Support for the Water Environment Improvements programme and preferred focus

Before answering any questions about the Water Environment Improvements programme, survey respondents watched a short video or read a transcript (if non-digital) about the Water Environment Improvements programme provided by NWG, which introduced the programme and provided examples of some improvements that could be made.

- Overall, more than three quarters of survey respondents agreed with the statement *"I value NW/ESW making investments to improve water environments for the benefit of customers"* (79%).
  - o When reviewing results by SEG, those in groups ABC1 were significantly more likely to 'strongly agree' with this statement (44%) than those in groups C2DE (37%).
- Just over half (55%) of survey respondents wanted NW/ESW to focus investment on smaller, more local water environments because these are often 'forgotten', to help the environment and to encourage tourism/boost the local economies.
- 42% of survey respondents felt that NW/ESW should focus on their most popular water environments that already attract a lot of visitors. Key reasons were to help encourage more tourism or help the economy, and because popular places need continuous maintenance and improvements made.

- Areas of improvement viewed as the highest priorities among survey respondents were 'seeing and hearing wildlife and enjoying nature' (53% selected this) and 'water quality aspects – its quality and appearance or odour' (47%).
  - o When reviewing results by SEG, there were no significant differences found in terms of priorities.
- In terms of access and recreational facilities, an improvement often suggested by survey respondents was to have more toilets. Following this, respondents wanted to see more cafes, visitor centres, playgrounds and picnic areas. Survey respondents also suggested 'better accessibility,' as well as having cleaner facilities and more bins provided.
  - o Amongst qualitative respondents, unprompted conversation swayed organically to a focus on accessibility, particularly in relation to car parking and accessible walkways. *\*Please note, however, that the information provided to respondents in the qualitative phase was slightly different to the information provided in the survey. For example, survey respondents were provided with a prompted list of possible improvements to water environments and asked to pick their top three priorities prior to being asked open questions around access and facilities, however, qualitative respondents were only asked about these three areas in an unprompted way, with no specific mention of the types of improvements that NW/ESW could make at this stage in the conversations.*
  - o Other key aspects that were mentioned in terms of expectations respondents would have in relation to accessibility included;
    - ♣ To ensure that there is adequate lighting near water environments at night to avoid accidents (Durham only)
    - ♣ To cut grass and overgrown vegetation to ensure pathways are clear and accessible.
    - ♣ To reduce flood risk of footpaths and maintain sensible water levels to avoid accidents.
    - ♣ Signage to ensure safety.
- In terms of wildlife, survey respondents wanted to see more birds in their local water environments, and many felt that any additional wildlife would be a good thing.



- Similarly, those who took part in the qualitative phase felt that they would like to observe more wildlife in their local area and also to know more information about local wildlife. *\*Please note, again, that the information provided to respondents in the qualitative phase was slightly different to the information provided in the survey.*
- Other key aspects that were mentioned in terms of expectations around wildlife included;
  - ♣ Maintain and preserve natural habitats and ecosystems.
  - ♣ Ensure that natural ecosystems are not disturbed by humans/general infrastructure.
- In terms of water quality, 13% of survey respondents felt that it was important for surfaces around water environments to be cleaned more regularly and to have better litter control around these environments. However, 8% of surveyed respondents were happy with the water quality as it is.
  - Similar in the qualitative phase, water quality was seen as a key aspect in terms of minimum expectations, with an expectation that both the water itself and the surrounding area was clean and well maintained. *\*Please note, again, that the information provided to respondents in the qualitative phase was slightly different to the information provided in the survey.*
  - Key aspects that were mentioned in terms of what would be considered 'clean' and 'well maintained' included the following.
    - ♣ Ensure that water is safe for human health if they were to use the water environment, e.g., for leisure activities such as swimming.
    - ♣ Ensure that water is free of algae/chemicals/foam.
    - ♣ Ensure that there is no rubbish left in water or surrounding areas (or to be cleaned up as soon as possible if so and bins emptied regularly).
    - ♣ Ensure that water is safe and habitable for wildlife to live.
- In terms of how projects should be proposed, the most popular choice amongst survey respondents was for NW/ESW to let environmental experts suggest possible projects (60%). In addition, most felt that NW/ESW should choose the projects that will have the biggest impact on local wildlife and plant life (61%). When reviewing results by SEG, those in groups ABC1 were

significantly more likely to suggest that NW/ESW should let environmental experts suggest possible projects (65%) than those in groups C2DE (56%), whereas no significant differences were found in terms of how NW/ESW should choose projects.

- Similar to the findings from the quantitative phase, most qualitative respondents had a preference for environmental experts to suggest projects (13 respondents/54%). *Please note, this question was asked in a live poll.*
- Similarly, the most popular response in the qualitative phase was also for NW/ESW to 'choose those that will have the biggest impact on local wildlife and plant life' (9 respondents/32%). *Please note, this question was asked in a live poll.*
- There was a keen willingness to be involved in local projects, with most respondents wanting to hear about projects through the local media (86%) and have the opportunity to help decide what improvements will be made (84%). Nearly two thirds wanted the opportunity to volunteer to help deliver the improvements (64%). When reviewing results by SEG, those in groups C2DE were significantly more likely to want to have the opportunity to volunteer to help deliver improvements (71%) than those in groups ABC1 (57%).
  - In the online focus groups, there was a similar keenness to be involved in projects, with 26 out of 28 respondents who were asked this keen to have the opportunity to help decide what improvements will be made. All in-depth interview respondents who were asked about willingness to be involved in local projects wanted to hear about projects through the media, have the opportunity to help decide what improvements will be made and have the opportunity to volunteer. *Please note, this question was asked in a live poll.*
- When asked how they'd like to be involved, there was clear enthusiasm in open responses for respondents to both be kept up to date about projects and to physically be involved (e.g. volunteering to help with local projects).

## Case study feedback (qualitative phase only)

- Three case studies of examples of that were either planned, in progress or completed, of NW/ESW working in collaboration with partners and examples of specific changes to be made in the hope of making improvements were shared with qualitative respondents (please note these differed between NW and ESW). Across all groups, the case studies presented to respondents were received positively.

## NW

### Kielder Water and Forest Park enhancement

- Some respondents in the NW groups, particularly in Alston and Ashington, felt that there wasn't a need to invest more money into Kielder as this was already in a good condition, however there was a general keenness for the addition of a dedicated ranger to protect the red squirrel.

### Royal Quays Marina

- Across all NW groups, there was consensus that the Royal Quays Marina project was a worthwhile area to focus on as it is accessible to lots of people.

### Upper Skerne Bridleway and river restoration

- Fewer respondents in the NW groups were aware of Upper Skerne Bridleway but felt that this project would have a positive impact on wildlife and biodiversity.

### Priority project

- Across the NW groups, there were varying views on which case study should be greatest priority. In Alston, all respondents favoured improvements to Upper Skerne Bridleway, but across the other groups, the preference tended to be for improvements to Royal Quays Marina, predominantly because this would have the greatest impact on the largest number of people and could also attract more visitors and businesses to the local area.

## ESW

### Carlton Marshes

- In the ESW groups, all respondents liked the project in Carlton Marshes and felt that this covered their key priorities in terms of accessibility and facilities.

### Bocking Mill

- Again, across all ESW groups, respondents liked the Bocking Mill case study and particularly liked the sound of the educational element of this project.

### Chelmer and Blackwater Navigation

- Across all ESW groups, respondents felt that improvements to the paths at Chelmer and Blackwater Navigation was a very high priority and highlighted the importance of ensuring the area was maintained over an ongoing period.

## Priority project

- In Chelmsford, most respondents felt that improvements to Chelmer and Blackwater were those that would have the greatest impact on themselves directly, however across all groups, respondents also tended to particularly like the improvements suggested to Carlton Marshes.

## Co-creating possible local improvements and proposed scheme feedback

- A high number of specific locations were identified across amongst survey respondents and across all qualitative discussions as areas that NW/ESW could/should focus on in terms of making improvements across the three areas; water quality, wildlife and accessibility.
- Amongst survey respondents, 72 specific locations were suggested by respondents for NW/ESW to consider in their programme. Themes included cleaning areas and clearing rubbish, more facilities, improving accessibility and footpaths, and encouraging more wildlife.
- Amongst qualitative respondents, 51 specific locations were suggested for NW/ESW to consider. Again, themes included cleaning areas and clearing rubbish, more facilities, improving accessibility and footpaths, and encouraging more wildlife.
- Some locations/improvements were identified by focus group respondents without being prompted, that NW/ESW had already considered at the time of the qualitative research as they had been mentioned in previous customer/stakeholder research, or in the quantitative phase of this research. These can therefore be considered to have a degree of customer support and therefore may be worthy of further exploration for feasibility. These were:

NW	ESW
Wansbeck Barrage	Hanningfield Reservoir
River Wear	Hornchurch Park
Tees Barrage	Chelmer Navigation
Hawthorn Dene	

## Monitoring improvements (qualitative phase only)

- Across all groups and in-depths, respondents highly valued NW/ESW making investments with the aim of improving water environments for the benefit of customers.

- The majority of respondents felt that it was highly important to ensure that NW/ESW monitor (i.e. by observations, checking water quality etc.) the changes they make on an ongoing basis and to convey the outcomes to members of the public. Across the groups, the main benefit of monitoring changes on ongoing basis was to ensure that changes had been successful, and targets met i.e. improvements made in the ways that activities were targeting.
- As well as monitoring the changes made in terms of the outcomes of the programme and making the public aware of these, there was mention in the majority of groups that it was also key for NW/ESW to continue with the upkeep and maintenance of any improvements that are made on an ongoing basis to ensure that efforts aren't lost over time and to maximise cost-benefit. *\*Please note, however, that NWG do not own all aspects of improvement proposals, and therefore cannot guarantee continued support.*
- There were various suggestions for how NW/ESW could keep members of the public up to date and be transparent about progress, for example via social media, by sharing key KPIs on the website, introducing volunteer wardens, within their annual report, via stories in local newspapers and by including information within water bills.

## How ambitious should NW/ESW be with this programme? (survey only)

Before answering questions in relation to how ambitious NW/ESW should be with the programme, all respondents watched a short video (or read a transcript of) that provided information on the impact this would have on customers' bills.

- 84% of NW respondents and 80% of ESW respondents stated that they would be willing to pay an additional 90p (NW) or 44p (ESW) to make improvements to 200km of water environments; acceptance surpassed CCWater's acceptability threshold of 70-75%.
- 74% of NW respondents and 72% of ESW respondents stated that they would be willing to pay an additional £1.80 (NW) or 88p (ESW) to make improvements to 400km of water environments. Again, willingness amongst customers met the CCWater acceptability threshold.
- Across all respondents, there was a high level of support for continuing this work past 2025 amongst both NW and ESW audiences. Overall, 90% of NW respondents wanted to see the work continue past 2025 and 88% of ESW respondents did.
- When reviewing results by SEG, no significant differences were found in terms of how willing respondents would be to pay more, or levels of support for this work to continue past 2025.

## Closing perceptions

- When asked at the end of the survey about their perceptions of NW/ESW again more respondents rated these as either 'positive' or 'very positive' (80%) than they did at the start (64%).
  - o This question was also asked in some of the qualitative discussions, with those asked saying that they felt pleasantly surprised that NW/ESW were investing in improvements to water environments. However, please note that this was only asked to a small number of people.
- In addition, mean satisfaction scores both overall, and across each respondent type, increased amongst survey respondents after completing the survey. Overall mean satisfaction scores increased by 0.4 to 7.9.
- Finally, all NPS scores provided also increased after completing the survey. Overall NPS increased by 15 to +13.
- These results indicate that educating about and involving local people in the Programme may increase satisfaction, improve perceptions of NW/ESW and drive a more positive NPS, particularly moving neutral perceptions towards positive. This will be important as NWG begin to pursue activities in local areas, particularly considering engagement with younger age groups who had fewer positive perceptions than the older age groups, and provides indicative evidence that awareness and experience of the Programme has the potential to positively impact NWG's C-MeX results over time.
- Satisfaction with the research itself was also high amongst survey respondents.

## Overall recommendations

A summary of the key recommendations to take forward from this research are as follows;

### Focusing investments

- Focus investments on a mixture of popular water environments and smaller, more local water environments, as a clear customer preference was not identified here.
- Based on results in relation to visitation, when seeking to make improvement in ESW areas, consider more of a focus on lakes and reservoirs and when seeking to make improvements in NW areas, consider more of a focus on coasts and beaches.
- Improvements made to water environments should focus on boosting wildlife and/or improving overall water quality (its quality and appearance or odour) as these were the overall priorities for respondents.
  - o Ensure that water environments are cleaned regularly and thoroughly.
- When thinking about the addition of new facilities, consider the importance of toilet facilities and ensuring these are accessible to all.
- Consider ways in which a higher number of birds could be encouraged in and around water environments, for example by the introduction of more bird boxes.
- Seek to involve environmental experts in the process of choosing specific projects to work on.
- When considering where to make investments, aim to strike a balance between making improvements to local water environments but also ensuring they do not become overly busy. In addition, aim to strike a balance between making improvements that will benefit local people and making improvements that will benefit wildlife and local ecosystems.

### Keeping local communities involved

- Take on board the willingness of community members to get involved with local projects, for example by considering volunteer schemes or a working party. Consider the most appropriate way to encourage community members to get involved with projects, both in the short and long term, particularly in light of the ongoing pandemic.

- Consider ways in which to keep local communities up to date on local projects that are upcoming/currently in progress – whether this be via leaflets, social media, local media or direct contact such as public meetings (when social circumstances and government guidance deem this appropriate).
  - o Also consider ways to keep local communities up to date on local projects on a more ongoing basis including upkeep and ongoing maintenance, e.g. by via social media, sharing KPIs on the website, within annual report, within local newspapers and by including information within water bills.
  - o Ensure transparency when updating local communities (this was about being open and honest about improvements that are made, the impact of projects, timescales and maintenance, rather than directly about cost).
- Consider utilising the NWG online forum (Have Your Say) to continue engagement around the Water Environment Improvements Programme, for example testing proposed schemes.

## Locations for consideration

- Review specific suggested locations listed by respondents and consider these areas for projects, focusing on: cleaning areas and clearing rubbish, introducing more facilities for visitors, improving accessibility and footpaths, and encouraging more wildlife.
  - o Further explore areas that have been identified for improvement on multiple occasions, such as:

NW	ESW
Wansbeck Barrage	Hanningfield Reservoir
River Wear	Hornchurch Park
Tees Barrage	Chelmer Navigation
Hawthorn Dene	

## Programme duration

- Results suggested that survey respondents want to see the programme continue past 2025, so think long term in your planning and community engagement around improvement activity.



## Wider considerations

- For wider activity, keep in mind the high levels of concern amongst local people in the operating regions in relation to the impact of the COVID-19 pandemic, and for non-bill payers in relation to their own personal finances. More support could be required in the future for the financially vulnerable.
- Also, keep in mind the level of concern amongst local people in relation to climate change and wildlife and habitats in their local area and the secondary benefits that that the Water Environment Improvements programme may have.
- Perceptions of ESW are less positive than for NW. This is most pronounced amongst the younger age groups and non-bill payers, which is to be expected when they don't currently have a relationship with the company. Consider ways to boost perceptions, satisfaction and NPS amongst those living within the ESW operating area, in particular amongst the youngest and non-bill payers. As scores across each of these increased after the survey, educating customers may be important when looking to boost these scores.



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