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Cotswolds Visual Impact Provision – Acceptability Testing

Summary Report for National Grid

July 2024

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Summary

High levels of consumer support were observed for the Cotswolds undergrounding project.

- Around 8 in 10 respondents (82%) stated the Cotswolds project and its bill impact are “acceptable”. One in ten (11%) viewed it as “unacceptable”, and a further 7% were uncertain (“don’t know or can’t say”).
  - The lowest levels of acceptability were observed for respondents who believed their electricity bill is poor value for money (61% acceptability for this group).
- The main reasons given for why the project is acceptable were: (i) the negligible impact on consumer bills; and (ii) the positive visual impact of the project for the Cotswolds National Landscape.
- The main concerns raised were: (i) the source of funding for the project; and (ii) the impacts during construction. Discussion in the online groups indicated that those who opposed the bill impact of the project were generally thinking about the total cost of the project (approx. £115m) alongside their own electricity bill.
- The results from the online survey are supported by the qualitative research. Participants engaged well with the topic and were supportive of National Grid consulting with consumers. The majority were comfortable with the Cotswolds project and felt that the improvement it would bring to the local area outweighed the cost to consumers and disruption that would be caused in the short term.

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Study objectives

This study examined the **acceptability of the Cotswolds undergrounding project to household consumers.**

- The research used a combined qualitative and quantitative approaches to provide a rounded view from consumers across England, Wales and Scotland.
  - Qualitative research: **Eight online focus groups** with a total of 55 participants from varying socio-economic and demographic backgrounds.
  - Quantitative research: **Nationally representative online survey of 2,000 household consumers**.

- The research aims included quantifying consumer support for the Cotswolds project (measured in terms of acceptability) as well as identifying the main factors that influenced that support, such as familiarity with the Cotswolds area, appreciation of the natural environment, and views on the visual impacts of electrical transmission infrastructure.
  - A secondary aim was to develop a similar set of findings for the Visual Impact Provision (VIP) overall.

- The results from this study are intended to inform National Grid's business case submission for the Cotswolds undergrounding project. They also provide some initial evidence on support for continuation of the VIP in future business plans.

Cotswolds undergrounding project

The **Cotswolds** project proposes to remove 18 pylons and 7 km of overhead line from the National Landscape.

- The project will be funded through consumer bills as part of the **Visual Impact Provision (VIP).** The average consumer bill increase will be £0.13 per year starting from 2024 for 25 years.
    - The VIP is an agreed investment pot between National Grid and Ofgem that funds projects to remove overhead lines in National Parks and Landscapes – where those lines have a large visual impact – by placing them underground.
- Construction for the Cotswold project will take about three years.
- The local community, potential visitors and the wider community have been consulted for the project.
- The VIP applies to England and Wales, but the consumer bill impact will be spread across households in England, Wales and Scotland.
    - The cost of the equivalent scheme in Scotland (VISTA) will likewise be spread across households in England, Wales and Scotland.

Example images of the Cotswolds project:

Methodology

Research overview

This study was undertaken from April to July 2025:

- The online focus groups were held in May 2024, with a total of 55 participants across 8 sessions.
- The online survey was conducted in June - July 2024. The total sample size was 2,000 household consumers, covering England, Wales and Scotland.
- Research materials - including descriptions of the Cotswolds project and VIP – were developed through an iterative testing process. This involved one-to-one interviews with consumers to gain feedback to revise content. Initial learnings from the focus groups were also used to finalise the survey prior to a “soft launch” pilot.

Research programme and timings

1. Initial research material development (April 2024)
2. Focus groups (May 2024)
3. Survey design and testing (May 2024)
4. Survey fieldwork (June 2024)
5. Analysis and reporting (July 2024)

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Qualitative research – focus groups

The focus groups were 90-minute moderated sessions held over Microsoft Teams with 7 participants per group:

- Before the groups, participants were provided with background on National Grid, the electricity sector, the Cotswolds project and the VIP programme through a short pre-reading exercise.
- Each group included a mix of open discussion, interactive tasks, and voting exercises.
- Participants were household bill-payers recruited from different socio-economic and demographic backgrounds to ensure a wide range of circumstances and viewpoints were reflected.

Topics discussed in the focus groups:

1. Views and knowledge of the electricity industry, including National Grid, Ofgem, and NG's business plans;
2. Familiarity and perceptions of natural areas and electricity infrastructure;
3. Opinions and acceptability of the Cotswolds project and VIP programme, including concerns and benefits;
4. Wider views about energy bills; and,
5. Feedback on the session, rating for content and importance.

Focus group sample

#	Location	Urban / rural	SEG	Age
1	Bristol	Urban	C2DE	18-45
2	Cotswolds area	Rural	ABC1	46+
3	Dorset	Rural	Any	Any
4	Leeds	Urban	Any	Any
5	Outer Birmingham	Suburban	ABC1	46+
6	East of England	Rural	C2DE	46+
7	Manchester	Urban	Future consumers (non-bill payers; 18-25)	
8	Glasgow	Urban	ABC1	46+

Quantitative research – consumer survey

The survey was scripted and implemented online, and contained a mix of explanatory showcards and text, questions, and exercises. It included around 40 total and took an average of 14 minutes to complete.

- A nationally representative sample was recruited from an online panel according to quotas to ensure representativeness. Data validation checks were used to verify respondents were providing considered responses (i.e. ‘straight-liners’ and ‘speeders’ were not included in the final sample of n=2000).
- Inputs from the focus groups helped shape the survey questions and available responses. The survey was then tested iteratively through a series of one-to-one online interviews.

Survey structure and content

A. **Introduction and screening questions:** for survey sampling quotas

B. **Warm-up:** background and questions introducing National Grid, the VIP and Cotswolds project.

C. **Acceptability:** direct questions on consumer support for the Cotswolds project and VIP programme.

D. **Follow-ups:** reasons for the acceptability responses.

E. **Profile:** socio-economic and demographic characteristics

Screenshot of the survey acceptability question.

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If National Grid proceeds with the Cotswolds National Landscape undergrounding project, the amount that you will pay for electricity transmission will increase by £0.13 (13p) per year for the period 2024 – 2049. As a reminder, your total electricity bill is approximately £21.00 per year, and the amount paid to National Grid is approximately £20 per year.

Overall, how acceptable is the proposed plan for undergrounding high-voltage overhead powerlines in the Cotswolds National Landscape?

When making your choices please consider:
1. Whether the underground project outcomes and results are important to you; and,
2. Your overall household income and expenses.

Click here for a reminder of the Cotswolds National Landscape undergrounding project and its cost to your household.

Please select one answer only.

Very acceptable	Acceptable	Unacceptable	Completely unacceptable	Don't know / can't say

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Survey respondent profile

Survey respondent profile - demographics

Overall, **the survey sample was nationally representative** by gender, age, and socio-economic group.

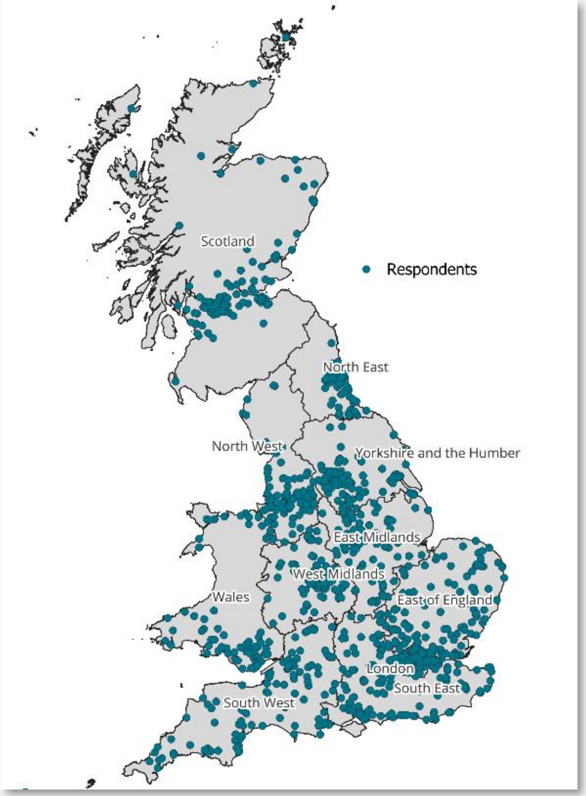
- The sample had at least 115 respondents per region.
- The mean household income of the sample was £33.5k per year (similar to the national average)
- The median household electricity bill was £870 (similar to the national average).
  - Around 40% of the sample self-reported at least some difficulty in paying bills.
  - Nearly 41% of the sample indicated receiving some kind of support for paying their household electricity bill (37% of the sample received winter fuel payments, which is similar to the national average).

Survey sample by demographic category

	Survey sample		National
Gender	**n**	**%**	**%**
Male	898	45%	49%
Female	1097	55%	51%
Age			
18-24	217	11%	10%
25-34	367	18%	17%
35-44	355	18%	16%
45-54	363	18%	17%
55-64	350	18%	16%
65+	262	17%	24%
SEG			
SEG AB	513	26%	23%
SEG C1	587	29%	33%
SEG C2	397	20%	21%
SEG DE	503	25%	23%

Source for national statistics: ONS (2019/2020)

Map of online survey respondents



Socio-economic group (SEG) definitions: A - Higher managerial, administrative or professional; B - Intermediate managerial, administrative or professional; C1 - Supervisory or clerical and junior managerial, administrative or professional; C2 - Skilled manual worker; D - Semi or unskilled manual worker; E - Casual worker, dependent on state pension only, or dependent on state welfare.

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Views on electricity infrastructure

Respondents were split on how much they noticed electricity infrastructure day-to-day.

- 51% of respondents considered electricity infrastructure to be noticeable in their daily life. Of those that see large transmission infrastructure regularly, the most common experience was during a commute or regular travel.
- 48% of respondents agreed that transmission lines and pylons detract from the scenic value of natural areas (28% were unsure).
- In the focus groups, around half of the participants noticed electricity infrastructure, but very few were concerned about it being in National Parks and Landscapes. Generally, the consensus was that having those lines was necessary to the power grid.

"I tend to go out of the city quite a lot. So, you drive past fields and stuff and, whereas in the city you don't notice them, when you go out, you do and they just they look like they're not meant to be there." Manchester - Future bill payer, 18-25

"I do a lot of travelling on a train. Up back and forth to Birmingham and obviously you can through countryside, and you can see pylons that can scar the countryside a little bit."

Glasgow - Urban, ABC1, 46+

"I definitely noticed when my parents moved into a new house while I was at university, and I came back and it's right next to a giant pylon." Manchester - Future bill payer, 18-25

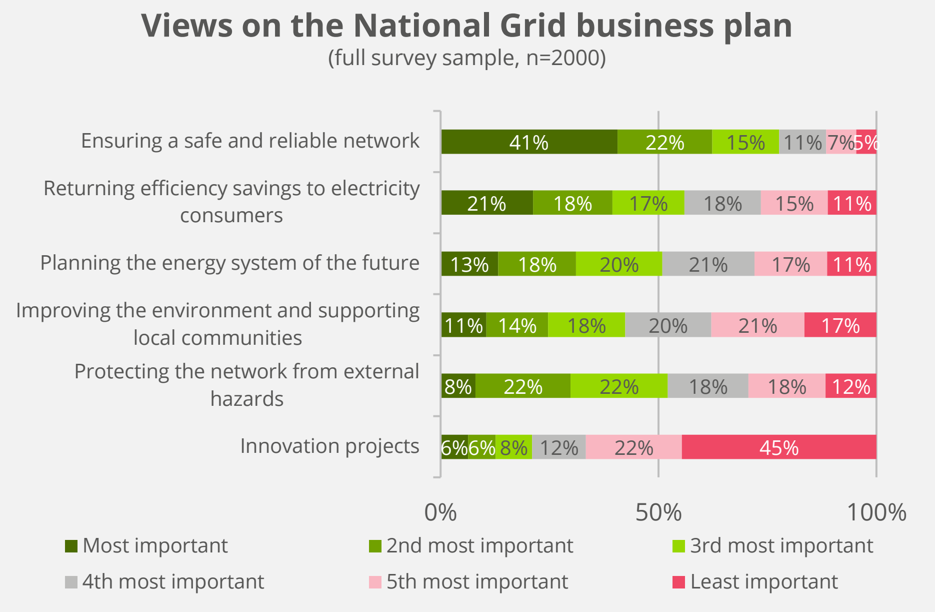
"They're just natural, I guess. I'm 60, they've been in my life. They're there, I know what they do. They don't worry me. I don't think about them. I live in quite a rural area, but it's just a natural part of the landscape." East of England - Rural, C2DE, 46+

Views on National Grid and the wider sector

A larger share of respondents felt their electricity bill is good value for money (63%).

- Participants in the focus groups had mixed views on the wider sector and frequently cited increasing costs for consumers and high profits for energy companies.
  - However, participants were surprised at the small portion of their electricity bill that goes to National Grid, indicating that aspect of their bill is more acceptable.

- Ensuring the network resilience and minimising costs were the two most important aspects of the National Grid business plan to respondents.



"You can just switch a light on and know that you're going to get electricity."
Dorset - Rural, Mixed SEG and Age

"I think if you'd asked me 18 months ago, year ago, I would have [said] it's fine. But I think we're paying a lot more, and it's exactly the same service."
East of England - Rural, C2DE, 46+

"I expect to pay for a service. Like I said before, about outages, we don't ever get any issues…"
East of England - Rural, C2DE, 46+

Consumer support – Acceptability of Cotswolds project

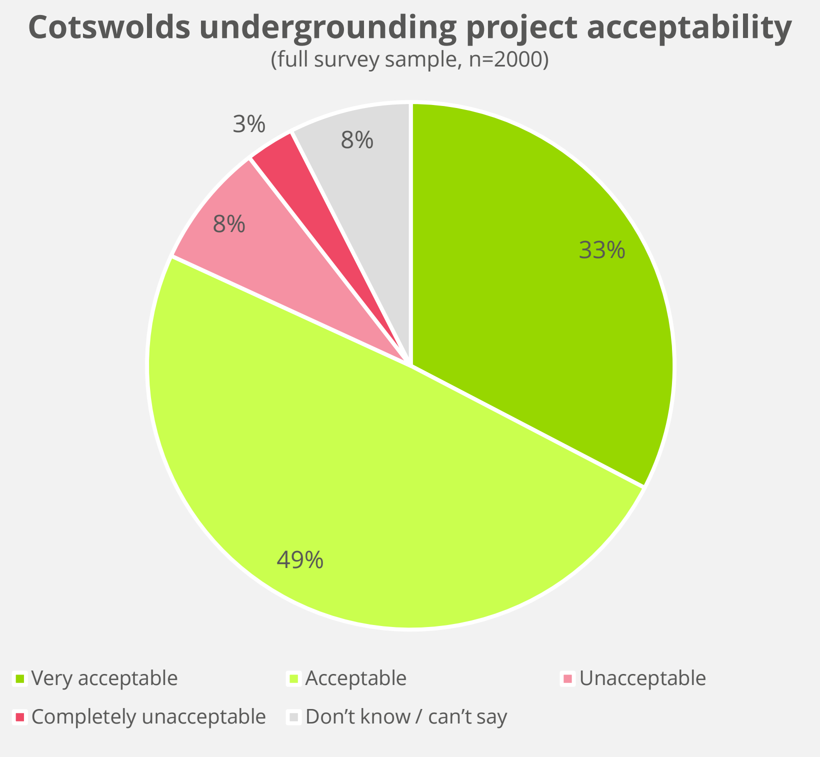
Consumer support for the Cotswolds project

Support for the Cotswolds undergrounding project is high.

- 82% of respondents considered the project acceptable versus 11% that did not.
  - Consumers cited the visual impact from the project once it is completed, the low per consumer cost (around £0.13 per household per year), and the steps taken to reduce wider impacts as the major reasons for support.
- Focus group participants did have questions about the project, in particular on the wider impacts it might have on the environment or the temporary disruption.

"It just looks a lot better without it. If it's going to be the same performance."
Cotswolds - Rural, ABC1, 46+

"I just think in some nice areas, just getting rid of eyesores. I don't see why that's a problem unless there's bad sides that you'll tell us later."
Manchester - Future bill payers, 18-25



Consumer support for Cotswolds - additional analysis

Support for the project was high amongst every major sample segment.

- Support was high amongst all socio-economic groups:
  - Higher rates of support were recorded among higher socio-economic groups (86% among SEG A and B, versus 77% among SEG D and E).
  - Acceptability was also positively correlated with income.
  - Acceptability did not vary systematically with age.
- Support was positively correlated with familiarity with the Cotswolds, with respondents who visited within the last month having markedly higher acceptability rates (93%).
- While levels of support were high amongst respondents from all regions of GB, consumers from South West (83%) and Wales (87%) were more likely to support the Cotswolds VIP plan, when compared to respondents from Scotland (77%) and the West Midlands (77%).

"In areas that you want to look pristine, it's going to make a visual difference."

Leeds - Urban, Mixed SEG and Age

See page 5 for definitions of socio-economic groups.

Consumer support by ability to pay bills

Support for the Cotswolds project was high even among those struggling to pay bills.

- A considerable percentage of respondents (40%) either sometimes or always find it difficult to pay household bills.[1] Within this group acceptability is lower, but still relatively high (74% acceptable versus 8% unacceptable).
- 10% of respondents stated that they were regularly in arrears on their bill payments (a total of 207 respondents), yet 72% of these respondents still found the project acceptable.
- Generally, the bill impact of £0.13 a year is low enough that it does not meaningfully impact consumers' bills, regardless of their current financial situation. Nonetheless, some respondents were sceptical of the bill impact quoted or had other concerns about the project.

"I think the costs are minimal. I think they'll just get written into the bills. I don't think anyone will moan or complain about it in years to come. It'll all just be forgotten. It's a minimal cost."

Cotswolds - Rural, ABC1, 46+

"It's 25 years, basically. I mean, it's not a lot, is it 13p times 25. £3.12. I think I can swallow £3.00. I mean, a cup of coffee costs about £3.00 doesn't it?" *Bristol - Urban, C2DE, 18-45*

"I don't like the question. The question is purely about 13 pence a year, which frankly I think is missing the point because 13 pence a year is basically nothing, but that's not the point…"

Cotswolds - Rural, ABC1, 46+

1. Of the full survey sample, n=2000.

Motivations for supporting the Cotswolds project

Those that supported the project generally did so due to the low cost and the visual impact:

1. The improvement to visual aspect of the landscape is worthwhile (59% of 1,637 supporting respondents).
2. The bill impact is minor (44%).
3. Steps taken to reduce wider impacts are sufficient (40%).

However, those that did not support the project raised a variety of concerns, and often did not support the project for multiple reasons:

1. Electricity companies should fund these kinds of projects out of their own profits (38% of 213 dissenting respondents) or the additional bill is significant (27%).
2. There are other, more important things that could be done with the money allotted (35%) and the total cost across all billpayers (approximately £115 million) is significant (27%).
3. The wider impacts of the project, such as to wildlife (34%) or to the landscape during construction (25%).

"They'll be doing it on areas where probably there's a lot of tourists, visitors. So overall, you'd be looking at areas where you could almost stick on a postcard. You can't do that at the moment, because you've got these pylons going across. Without the pylons there, it will look a bit more picturesque. So I… see the benefit of it."

Bristol - Urban, C2DE, 18-45

There's not just the disruption and the digging to put the cables underneath, but the absolute mess it's going to make getting all the heavy machinery into those areas to do the work. These are places of outstanding natural beauty. They're going to be destroyed. And it's going to affect everybody's enjoyment of these places for a long time.

Cotswolds - Rural, ABC1, 46+

Undecided responses

In both the survey and the focus groups, there was a portion of people that were undecided on the project.

- In the survey, the most common reason for being undecided is that the need for further information about the project to make a decision (34% of n =150 undecided respondents)

- In focus groups, a variety of additional information was requested, including information on:
  - The longevity of overhead lines versus underground ones.
  - The costs of maintenance for underground lines.
  - The level of disruption when underground lines are fixed or replaced.
  - The long-term impact to ecological and human health of underground lines.
  - When (and how) the existing infrastructure would be updated and replaced otherwise.

"Has it been checked how easy it is to maintain it, because surely if something goes wrong all the landscape will have to be dug up again?"

Loughborough - Rural, C2DE, 46+

"I do think it will solve the problem visually, but it's going to disrupt so much of the natural world, is it really worth it?

Wrexham – Suburban, ABC1, 18-45

"I'd like to add that my concern would come the repair, so if anything went wrong it's sort of exposed on pylons, presumably pretty easy and pretty fast to repair it. Whereas if it's underground, you've got to dig it all up, find the issue, etc."

Dorset - Rural, Mixed SEG and Age

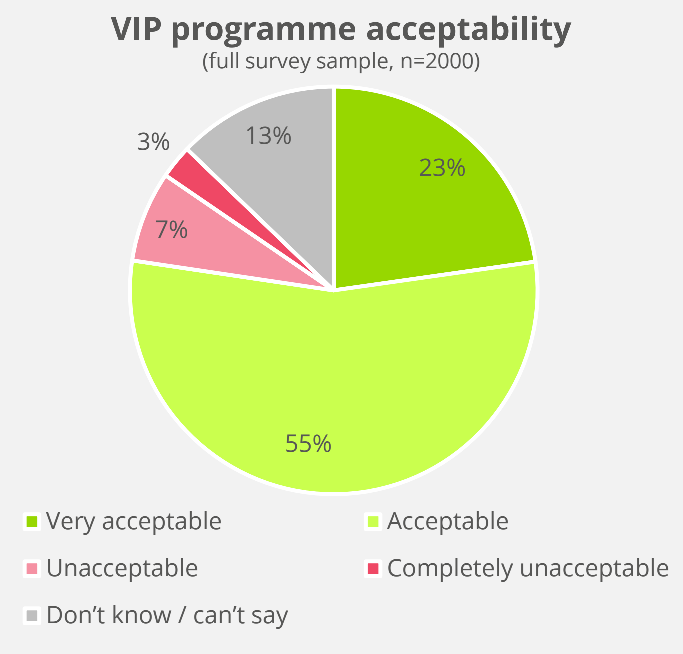
Wider findings

Views on the overall Visual Impact Provision

Consumer support for the wider VIP programme

The wider VIP programme also had a high level of consumer support.

- When asked about the full suite of potential VIP projects, 78% of respondents supported the programme versus 10% that found it unacceptable.
  - Acceptability was highest amongst SEG AB with around 83% of respondents accepting the overall programme. This value decreased to around 70% for SEG DE.
- As with the Cotswolds project, consumers from South West England and Wales were more likely to support the overall plan than those in Scotland, Greater London and the West Midlands.
- Respondents that never visit National Parks or Landscapes still supported at a lower rate (65%).



"The visual impact is the thing for me. Those pictures that you've shown me with the pylons... and looking at it after you've got the landscape as it was [pre pylons] which looks better.
Cotswolds - Rural, ABC1, 46+

Conclusions

The study found a high level of support for the Cotswolds VIP undergrounding project. There is a clear majority of bill payers that find the project acceptable.

The acceptability of the project was largely based on the low perceived cost and final outcome in terms of the improved visual amenity in the local area. It was also understood that the construction phase and environmental impact would not result in significant local level disruption. However, many participants and respondents did question the wider impacts, which demonstrates they were weighing up the pros and cons of the project when indicating their support or not.

The survey results also show a good level of bill-payers support for the entire VIP programme. The view is that generally undergrounding projects have merit, and the impact to their bills is considered minimal, especially in the context of the total energy bill.

Finally, the survey respondents and focus group participants indicated that they found participating in this process worthwhile.

Thank you

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