

SEPTEMBER 2025

Energy Price Accountability Survey

**CLIMATE
POWER**

CONFIDENTIAL. FOR RECIPIENT'S USE ONLY. UNAUTHORIZED USE, DISTRIBUTION OR COPYING IS PROHIBITED

Methodology

Registered Voters

Global Strategy Group conducted a survey of **1,000 registered voters nationwide (excluding Alaska, Hawaii, and California)**, along with oversamples of **300 voters in Arizona, Georgia, Iowa, Michigan, North Carolina, Ohio, Pennsylvania, and Texas** between August 20 and August 26, 2025.

Margin of error

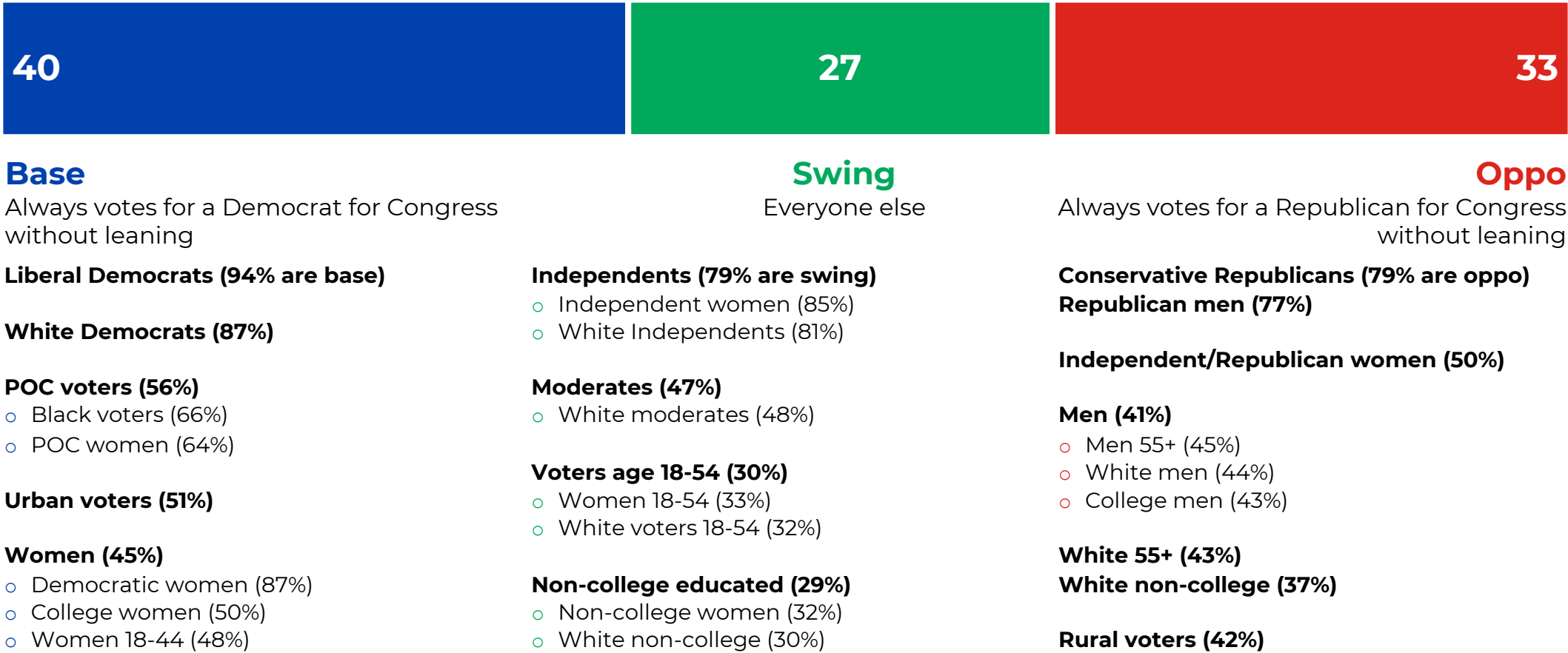
The margin of error at the 95% confidence level is +/- 3.1%.

The margin of error on sub-samples is greater.

State Oversamples	OS N size	Total N size	Margin of Error
Arizona	300	319	+/- 5.5%
Georgia	300	330	+/- 5.4%
Iowa	300	303	+/- 5.6%
Michigan	300	334	+/- 5.4%
North Carolina	300	333	+/- 5.4%
Ohio	300	336	+/- 5.3%
Pennsylvania	300	338	+/- 5.3%
Texas	300	374	+/- 5.1%

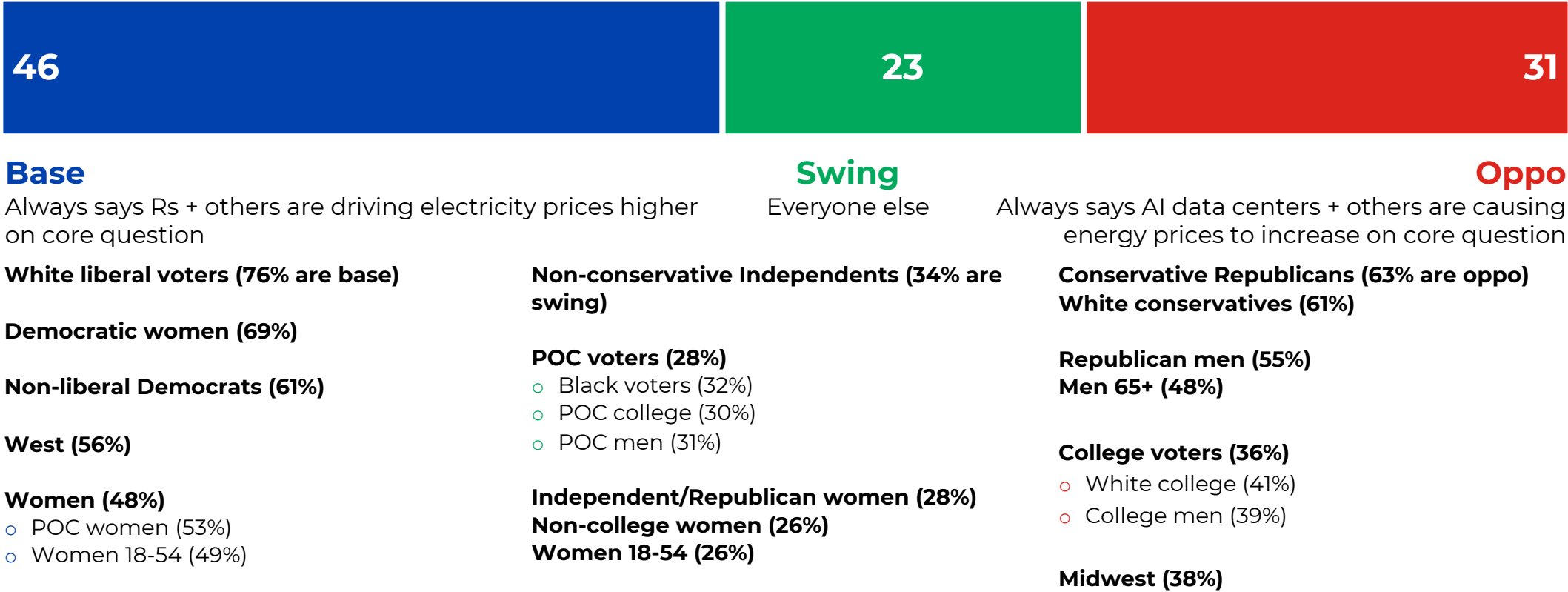
Independent, younger, and white non-college women are most likely to be political swing voters

Political Targets



Independent, younger, and non-college women are also swing on energy price blame, along with Black men

Energy Price Blame Targets



Key Findings

Before hearing anything, voters already place significant blame on Trump (and utilities) for rising electricity prices.

A solid majority of voters believe that their elected leaders have an impact on electricity and energy costs.

Voters believe that now is the time for more energy, not less – and that clean energy can bring electricity online faster and at a lower cost than gas.

A majority believes that Republicans, utility companies, and Big Oil CEOs are making it harder to build clean energy projects – and that this is driving electricity prices higher.

Reminding voters that Republicans are driving energy costs higher by actively working (alongside utilities and Big Oil CEOs) to restrict clean energy projects helps shift the generic ballot significantly in favor of Democrats – even in the face of opposition messaging.

Landscape

Voters believe that their elected leaders can have an impact on electricity costs – but there is room to increase intensity

How much impact do you think that [X] can have on the cost that people like you pay for each item?

Impact of the **President, Congress** on costs

Impact of **governors, state legislatures** on costs

	A lot of impact	Some impact	Not sure	No impact	Total Impact	% Dem	% A Lot Ind*	% Rep		A lot of impact	Some impact	Not sure	No Impact	Total Impact	% Dem	% A Lot Ind*	% Rep
Health care and health insurance	68		25		94	82	65	58		54		36	8	90	62	51	49
Groceries	63		33		96	76	58	55		46		41	11	87	50	40	44
Housing (including rent, mortgages)	61		29	8	90	75	56	52		55		34	10	89	64	49	50
Gasoline	61		32	5	93	66	55	59		47		39	12	86	48	43	47
Electricity	47		42	8	89	58	47	37		47		42	9	89	52	45	42
Childcare	37	34	10	19	71	55	36	20		35	38	7	20	73	43	36	26
Clothing	34	45	5	16	79	48	30	24		21	43	5	31	65	25	14	21

Voters are already blaming Trump (and the federal government) and utility companies for rising electricity prices

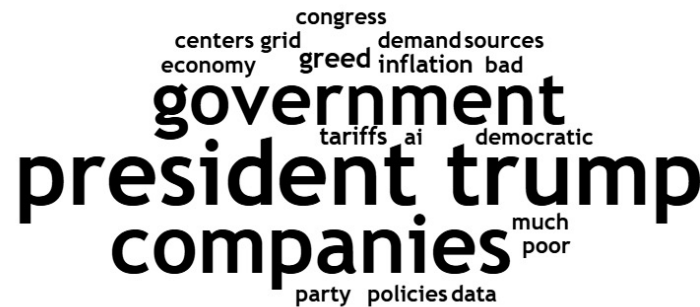
As you may know, electricity prices are expected to rise more quickly in the coming months. Just based on what you know, **who or what do you blame the MOST for rising electricity prices?**



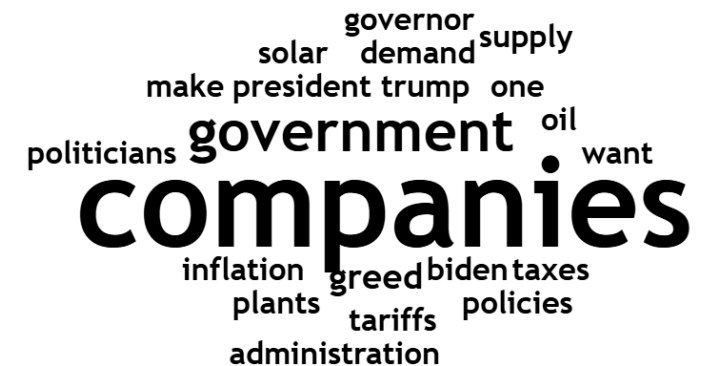
Nationwide (Overall)



Democrats



Independents



Republicans

Voters agree that now is the time for more clean energy, not less. Solid majority thinks clean energy can bring electricity online at lower cost than gas

Statements about: Electricity Prices, Demand (AI), & Clean Energy (True/False on a 0 to 10 scale)

	Definitely true (9-10)	Somewhat true (6-8)	Neutral (5)	False (0-4)	Total True NW	Mean						
						NW	Swing			Dem	Ind	Rep
							Pol	Blame				
Decisions by Congress about whether and how much the country invests in different sources of energy have a real impact on the electricity rates I pay.	33	38	16	13	71	6.97	6.70	6.74		8.00	6.82	6.06
The actions that Congress has taken to roll back the use of clean energy will cause energy prices to rise faster and hurt regular Americans.	31	31	16	22	62	6.36	6.20	6.57		8.00	6.31	4.82
Adding more wind and solar power to the electricity grid will help keep my electricity rates lower.	33	30	16	21	63	6.50	6.53	6.54		7.87	6.61	5.11
New solar and wind farms can bring electricity online more quickly and at a lower cost than new gas power plants.	29	32	18	21	61	6.31	6.41	6.34		7.74	6.37	4.91
With energy prices already high and electricity demand rising, now is the time to produce more clean energy like wind and solar, not less.	39	29	15	17	68	6.85	6.73	6.79		8.36	6.69	5.45
With energy prices already high and electricity demand rising because of AI data centers...	39	28	16	17	67	6.95	6.88	6.82		8.14	6.67	6.00
The expansion of data centers is one of the biggest reasons for increasing electricity prices.	16	36	27	21	52	5.92	5.50	5.76		6.32	5.51	5.74
The expansion of AI data centers ...	19	34	20	27	53	5.85	5.51	5.91		5.90	6.17	5.62

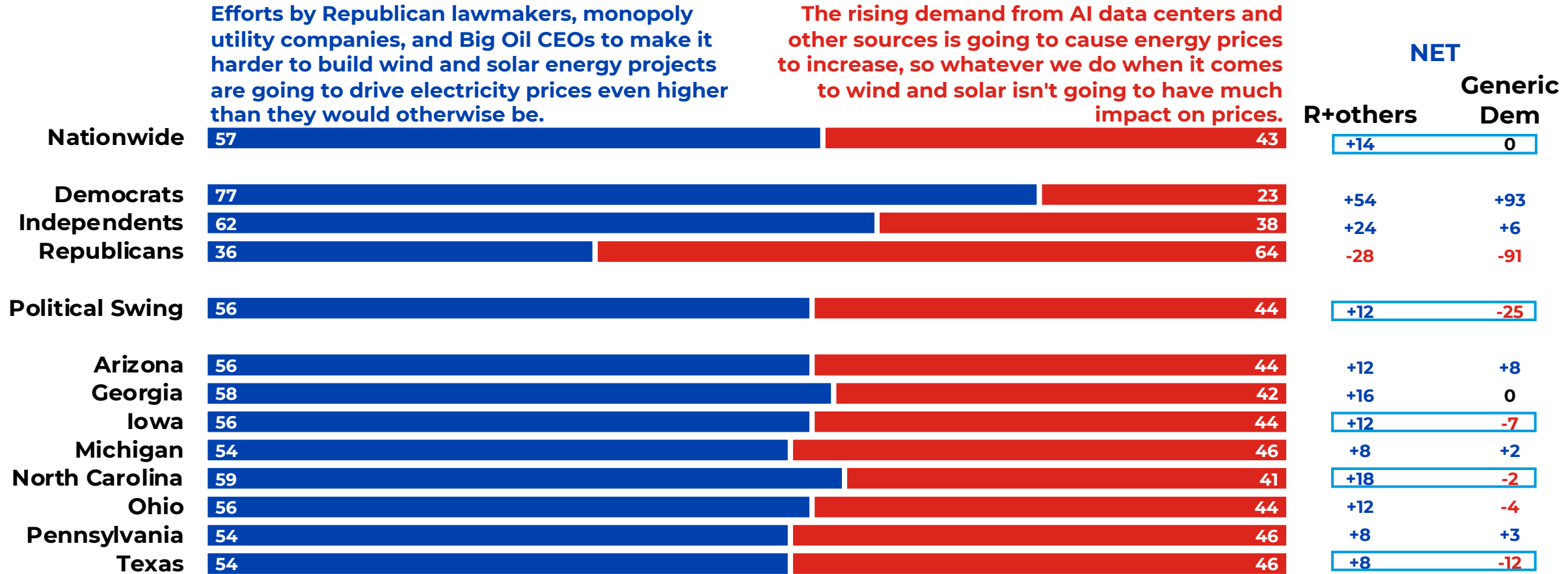
Swing voters strongly believe O&G CEOs are undermining clean energy. A majority says the same thing about Trump and the GOP, but there is more work to do here

Statements about: CEOs, Trump, & Republicans (True/False on a 0 to 10 scale)

	Definitely true (9-10)	Somewhat true (6-8)	Neutral (5)	False (0-4)	Total True NW		Mean				
						NW	Swing		Dem	Ind	Rep
							Pol	Blame			
Oil and gas CEOs are actively working to make it harder to build new solar and wind energy projects to protect their own profits.	28	32	20	20	60	6.38	6.24	6.47	7.30	6.25	5.57
Power company CEOs are actively working to make it harder to build new solar and wind energy projects because they make higher profits from new gas power plants.	24	32	22	22	57	6.14	5.87	6.19	7.09	5.72	5.43
Utility company CEOs ...	23	34	19	24	57	6.08	5.75	6.26	6.90	5.64	5.56
Donald Trump and Republican lawmakers are actively working to make it harder to build new solar and wind energy projects.	34	20	21	25	54	6.28	5.56	5.93	8.14	6.23	4.57
Republican lawmakers are actively working to make it harder to build new solar and wind energy projects.	26	28	20	26	54	6.02	5.26	5.52	7.69	5.70	4.56
Donald Trump simply hates clean energy, and he and his Republican allies are trying to kill wind and solar for ideological reasons.	30	19	15	36	49	5.52	4.81	5.18	7.97	5.45	3.20
Republican lawmakers, oil and gas CEOs, and monopoly utility companies are <u>working together</u> to make it harder to build new solar and wind energy projects	27	28	18	27	55	6.02	5.65	6.03	7.65	6.09	4.42

A majority think that efforts by GOP, utility companies, and Big Oil CEOs to undermine clean energy projects are to blame for higher electricity prices

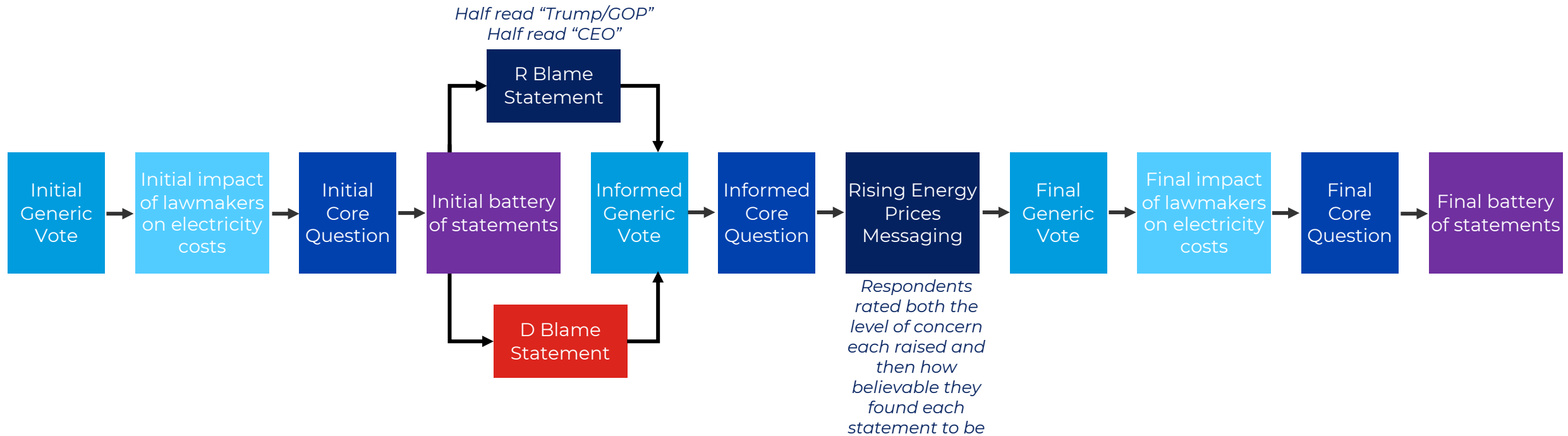
Knowing that electricity prices are expected to rise more quickly in the coming months, and just based on what you know, which of the following statements do you agree with more?



Messaging and Movement

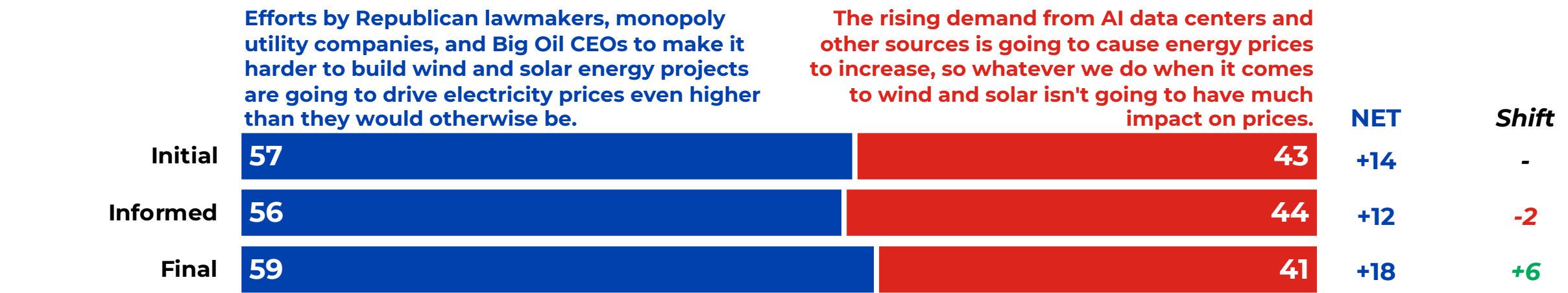


Survey Structure

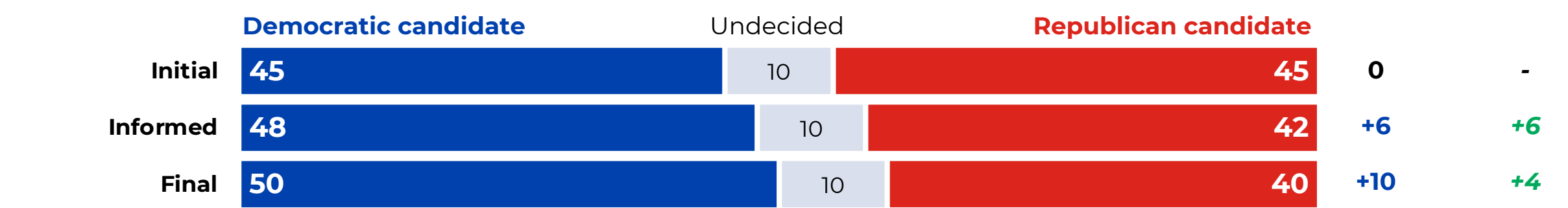


Initial exchange boost Dems on the generic ballot. Further messaging moves attitudes on the core question

Knowing that electricity prices are expected to rise more quickly in the coming months, and just based on what you know, which of the following statements do you agree with more?



Generic Ballot



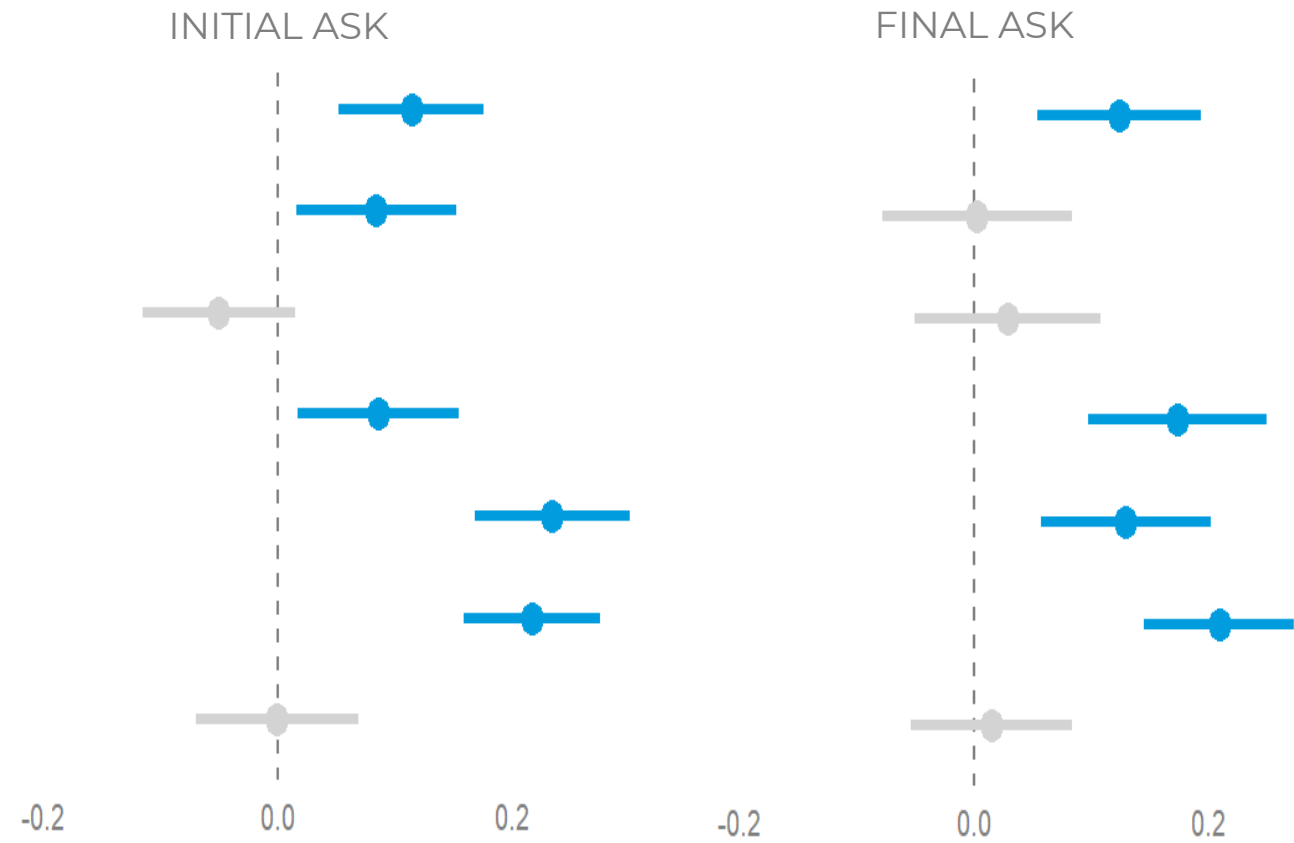
Solid gains on belief that clean energy is faster and cheaper and that utilities and GOP are making those projects harder, esp. with swing

Statement Movement	Mean			Energy Price Blame Swing			Change by State							
	Overall			Swing										
	Initial	Final	Change	Initial	Final	Change	AZ	GA	IA	MI	NC	OH	PA	TX
Congress impacts my rates	6.97	6.95	-0.02	6.74	6.84	+0.10	-0.14	-0.28	-0.21	-0.10	0.18	-0.10	-0.37	-0.07
More wind and solar will mean lower rates	6.50	6.76	+0.26	6.54	7.07	+0.53	0.36	-0.03	0.42	0.35	0.40	0.16	0.11	0.13
O&G CEOs making wind and solar harder	6.38	6.70	+0.32	6.47	7.15	+0.68	0.66	0.33	0.10	0.12	0.07	0.25	0.05	0.44
Congressional actions will cause higher prices	6.36	6.44	+0.08	6.57	6.68	+0.11	0.02	0.00	0.06	-0.16	0.07	-0.09	-0.03	0.02
Solar and wind quicker and cheaper	6.31	6.78	+0.47	6.34	7.04	+0.70	0.55	0.29	0.64	0.60	0.56	0.25	0.51	0.20
Trump and GOP making wind and solar harder	6.28	6.51	+0.23	5.93	6.44	+0.51	-0.05	0.37	0.05	-0.18	0.30	0.03	-0.11	0.09
Power companies making wind and solar harder	6.14	6.53	+0.39	6.19	7.06	+0.87	0.53	0.00	0.13	0.73	0.29	0.38	0.24	0.14
Utilities making wind and solar harder	6.08	6.57	+0.49	6.26	6.96	+0.70	0.19	0.54	0.51	0.30	0.18	0.58	0.36	0.27
GOP working to make wind and solar harder	6.02	6.49	+0.47	5.52	6.81	+1.29	0.57	-0.17	0.14	-0.09	0.25	-0.04	0.39	0.42
GOP, O&G, Utilities working together	6.02	6.35	+0.33	6.03	6.42	+0.39	0.37	-0.10	0.28	-0.07	0.14	0.05	-0.09	0.17
Trump and GOP killing w/s for ideo reasons	5.52	5.91	+0.39	5.18	6.09	+0.91	0.45	0.39	0.24	-0.07	0.53	0.38	0.19	0.39
Combined: GOP making it harder	6.15	6.50	+0.35	5.73	6.62	+0.89	0.26	0.10	0.09	-0.14	0.28	0.00	0.14	0.26
Combined: Utilities/Power making it harder	6.11	6.55	+0.44	6.23	7.01	+0.78	0.36	0.27	0.31	0.52	0.23	0.48	0.30	0.20

Belief that clean energy keeps rates lower, that rolling them back means higher prices, and that GOP is doing it drives our core question

Regression Analysis: Association between Core Question and Final And Initial Statements

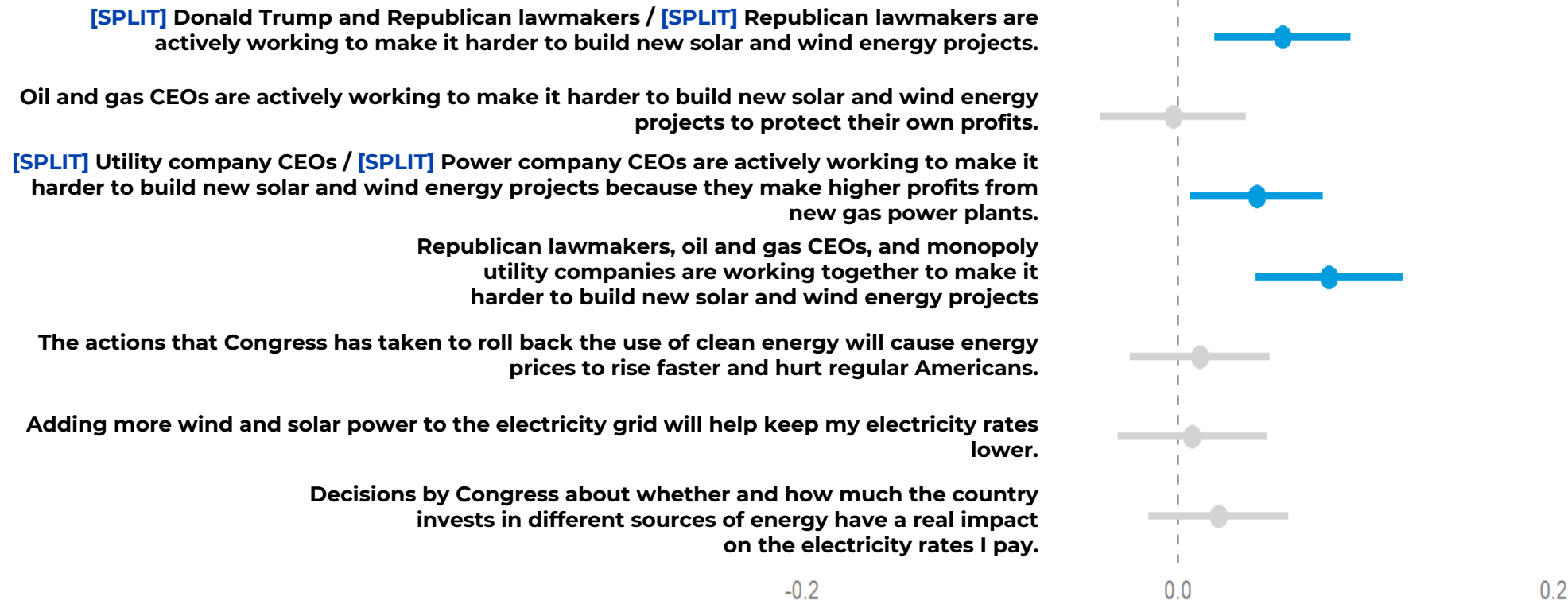
- [SPLIT] Donald Trump and Republican lawmakers / [SPLIT] Republican lawmakers are actively working to make it harder to build new solar and wind energy projects.
- Oil and gas CEOs are actively working to make it harder to build new solar and wind energy projects to protect their own profits.
- [SPLIT] Utility company CEOs / [SPLIT] Power company CEOs are actively working to make it harder to build new solar and wind energy projects because they make higher profits from new gas power plants.
- Republican lawmakers, oil and gas CEOs, and monopoly utility companies are working together to make it harder to build new solar and wind energy projects
- The actions that Congress has taken to roll back the use of clean energy will cause energy prices to rise faster and hurt regular Americans.
- Adding more wind and solar power to the electricity grid will help keep my electricity rates lower.
- Decisions by Congress about whether and how much the country invests in different sources of energy have a real impact on the electricity rates I pay.



These regressions used the initial and final asks on the core question as the dependent variables and controlled for demographics and political attitudes.
Blue = Significant positive correlation with agreement that Republicans, utilities, and Bi Oil CEOs are to blame for energy price increase

Convincing voters that the GOP are working (with Big Oil and utilities) to make wind and solar harder is a driver of shifting the generic ballot

Regression Analysis: Association between the Change in the Generic Ballot and Change in Belief in Statements



These regressions used the initial and final asks on the generic ballot as the dependent variables and controlled for demographics and political attitudes.

Blue = Significant positive correlation changing support for a generic candidate for Congress

In a split experiment, we tested statements focused on Trump and tying GOP's war on renewables to the utility and oil CEOs against an opposition statement

Read by Half	[TRUMP] (Some/Other) people say: During last year's campaign, Donald Trump promised oil and gas CEOs a "windfall" if they contributed millions to his campaign. They did, and now Trump is making good on his promise by waging what economists are calling a "war" on wind and solar power that will "cripple" American clean energy, create an energy shortage, and cause average electricity prices to increase by nearly 20%. With electricity demand skyrocketing, we need more energy, not less. But Trump and Republicans have eliminated tax credits for clean energy and made it nearly impossible to produce new wind and solar power –even though solar and wind power is already 50% cheaper than electricity from gas and coal.
Read by Half	[GOP AND CEOs] (Some/Other) people say: With energy prices already high, and power-hungry data centers causing demand to skyrocket, we should be producing more energy, not cutting the fastest growing source of affordable energy and creating an energy shortage. Wind and solar power are the fastest and cheapest ways to bring new electricity online, but oil, gas and [SPLIT: utility/SPLIT: power] CEOs have been delaying it for years to protect their own profits. Now, economists say that Republicans are waging a "war against renewable energy" that will "cripple" American clean energy and cause average electricity prices to increase by nearly 20%, by eliminating tax credits for new wind and solar farms and canceling thousands of already planned projects.
Read by All	(Some/Other) people say: Democratic lawmakers and radical environmental groups are blocking the production of American natural gas and pushing for the rapid expansion of unreliable green energy that simply isn't ready to meet our growing demand. With the expansion of data centers, we need to prioritize building new gas power plants and delaying the retirement of coal power plants in order to ensure that we are able to meet increased energy demand, instead of forcing states to invest in unreliable forms of green energy that could leave American families with higher costs and risk of blackouts.

The “GOP and CEOs” frame appears to be more effective at moving the generic ballot and the core question

Knowing that electricity prices are expected to rise more quickly in the coming months, and just based on what you know, which of the following statements do you agree with more?

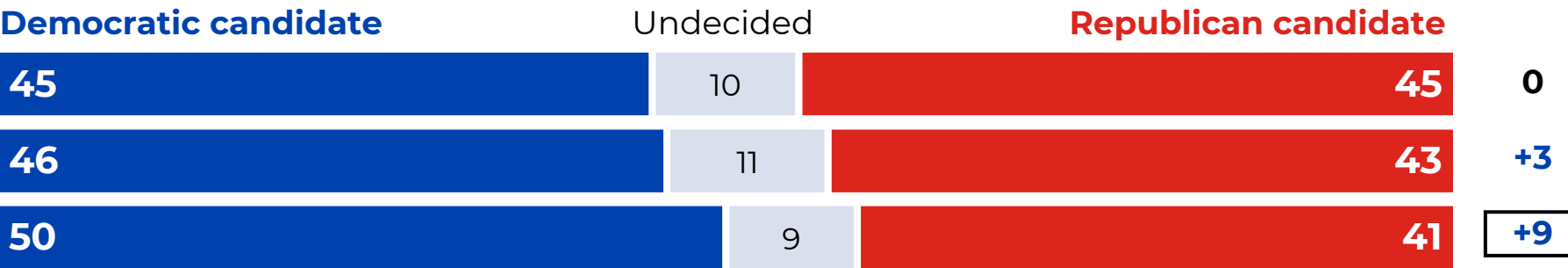
Efforts by Republican lawmakers, monopoly utility companies, and Big Oil CEOs to make it harder to build wind and solar energy projects are going to drive electricity prices even higher than they would otherwise be.

The rising demand from AI data centers and other sources is going to cause energy prices to increase, so whatever we do when it comes to wind and solar isn't going to have much impact on prices.

NET



Generic Ballot



Messaging on Rising Energy Prices

[CE EDUCATION 1] Solar and wind farms only take one or two years to build, while gas power plants take six or more years and are far more expensive. And once solar and wind farms are built, they produce a lot of electricity for very little cost. A single acre of solar panels can power 80 homes, and just two turns of a wind turbine can power a home for a day. That's why clean energy is already 50% cheaper than electricity from gas power plants.

[UTILITY GREED] Monopoly **[SPLIT: utility/SPLIT: power]** companies are focused on getting rich. They make higher profits from gas power plants, so they have delayed solar and wind projects while increasing rates, making record profits, and giving massive bonuses to their executives. Some of these companies have seen their profits and executive pay more than double over the last three years, while consumers are paying higher and higher rates.

[CE EDUCATION 2] Solar and wind farms only take one or two years to build, while gas power plants take six or more years and are far more expensive. And once solar and wind farms are built, they produce a lot of electricity for very little cost. That's why clean energy is already 50% cheaper than electricity from gas power plants, and it's why we already get more than 25% of our electricity from wind and solar, even though many Americans don't realize it.

[MICRO COSTS] With energy prices already high, and growing demand for more energy driving them even higher, we should be producing more energy, not creating a shortage by killing the energy source that is cheapest and fastest to build. But that's exactly what Republicans are doing by cutting clean energy. Economists say that their actions will cause electricity prices to increase nearly 20%, with the average family paying \$110 more next year.

[BROADER COSTS] Republicans promised they would bring costs down, but they've done the opposite. First, their tariffs raised prices on groceries and home goods. Then they cut Medicaid and ripped away health care from millions, forcing Americans, even those who have insurance, to pay more for health care. Now, they are cutting clean energy, raising electricity costs for American families at a time when the cost of living is already surging.

[TRUMP OIL] During last year's presidential campaign, Donald Trump promised oil and gas company CEOs a "windfall" if they contributed millions to his campaign. They came through for him, and now he is making good on his promise by doing everything in his power to eliminate solar and wind energy so that the Big Oil and Gas CEOs have less competition and can make higher profits, while consumers pay higher electricity bills.

[GOP AND O&G] Republicans in Congress receive millions of dollars in campaign contributions from oil and gas CEOs to do their bidding. Not only by killing affordable clean energy projects, but also by creating a new tax carveout that exempts oil and gas companies from paying corporate taxes, forcing regular Americans to pay twice – once for higher electricity prices and again on Tax Day for these taxpayer-funded handouts for oil, gas, and coal power.

[PUSHING COAL] At the same time that Trump and Republicans are killing projects to create cheap clean energy, they are forcing states to keep decades-old, toxic, and inefficient coal plants open, even when utilities don't want them, because they are so much more expensive to operate. According to economists, that could end up costing some consumers an extra \$200 per year on their electricity bill.

[STATUS QUO] Republican politicians and the oil, gas and monopoly **[SPLIT A: utility/SPLIT B: power]** CEOs who fund their campaigns are desperate to keep things as they always have been – high energy prices, high profits, and more campaign contributions. With clean energy growing at a record pace, they knew the status quo was under threat, so they've taken action to preserve it, even though that will mean even higher energy costs for regular Americans.

[TRUMP IDEO] Donald Trump has waged an ideological war against clean energy. He falsely claims that the sound from wind turbines causes cancer, and he recently insisted that "we will not allow a windmill to be built in the United States" under his watch – and he's following through. He just cancelled every single offshore wind project in federal waters, despite the fact that these projects have a proven ability to reduce energy costs for consumers.

[STRAIGHT GOP HIT] In recent months, Republicans have waged a "war against renewable energy," according to economists, by significantly raising taxes on new wind and solar projects, canceling all offshore wind projects, and making it nearly impossible to produce new wind and solar power. Energy economists say that these actions are a "kill shot" that will "cripple" the American clean energy industry.

Utility greed and education about clean energy being cheaper and faster to bring online are most convincing and believable messages with swing voters. Connecting GOP actions to rising costs are in a close second tier

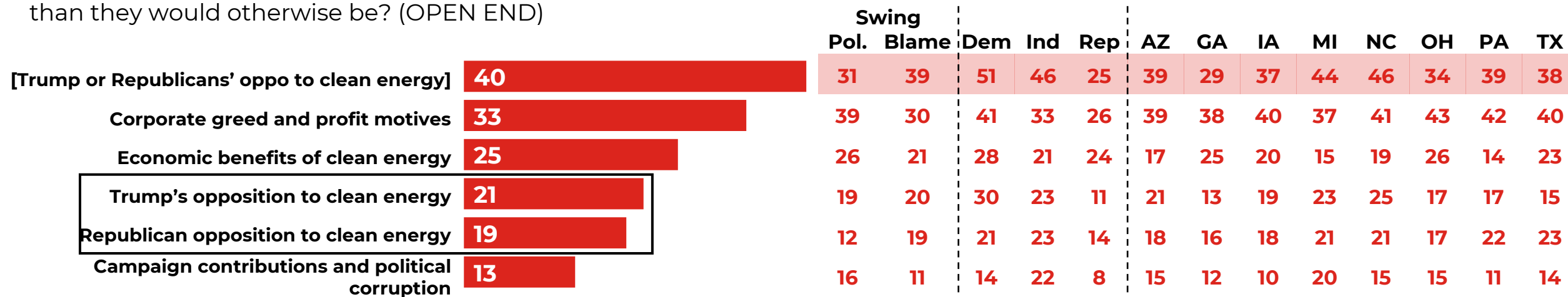
How convincing/believable do you find each statement about why energy prices are rising?

Convincing & Believable Means (on a 0 to 5 scale)						
Nationwide		Political Swing		Energy Price Blame Swing		
Convincing	Believable	Convincing	Believable	Convincing	Believable	
3.57	3.57	3.70	3.75	3.67	3.71	[CE EDUCATION 1]
3.57	3.62	3.60	3.72	3.64	3.69	[UTILITY GREED]
3.55	3.58	3.55	3.63	3.62	3.50	[CE EDUCATION 2]
3.45	3.52	3.52	3.62	3.50	3.57	[MICRO COSTS]
3.42	3.45	3.54	3.60	3.72	3.67	[BROADER COSTS]
3.41	3.54	3.41	3.54	3.52	3.56	[TRUMP OIL]
3.41	3.50	3.51	3.56	3.45	3.61	[GOP AND O&G]
3.39	3.43	3.35	3.51	3.47	3.45	[PUSHING COAL]
3.34	3.44	3.40	3.56	3.39	3.49	[STATUS QUO]
3.33	3.38	3.36	3.42	3.43	3.43	[TRUMP IDEO]
3.30	3.44	3.23	3.43	3.43	3.55	[STRAIGHT GOP HIT]

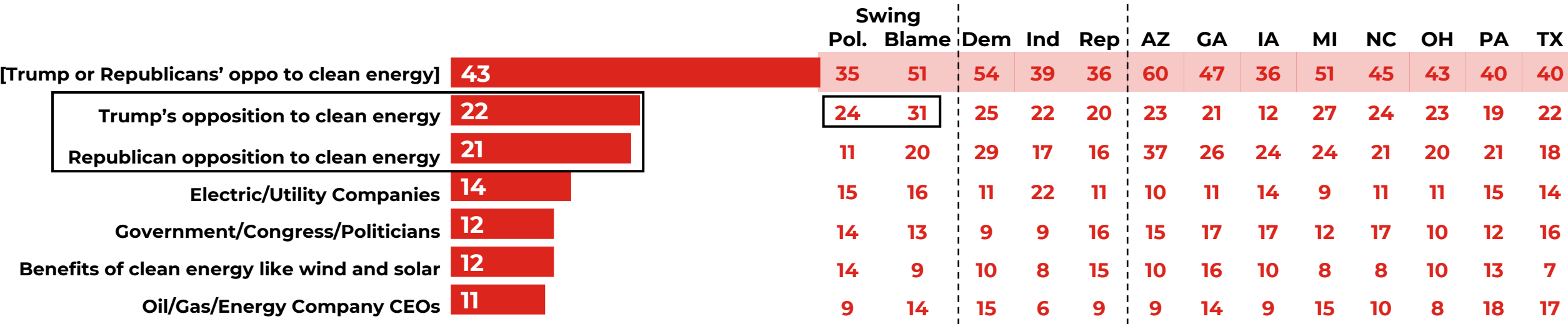
Trump/GOP actions are particularly new and surprising to swing.

Joined by greed and clean energy benefits as convincing

Out of everything you just read, what were **the one or two most convincing arguments** that efforts by Republican lawmakers, monopoly utility companies, and Big Oil CEOs to kill wind and solar energy projects are going to drive electricity prices even higher than they would otherwise be? (OPEN END)



Out of everything you just read, what were the one or two newest or most surprising pieces of information you read **that made you think differently about who and what are to blame for higher electricity prices?** (OPEN END)



Messaging Imperatives

Messaging Imperatives

There is an opening to pin blame for rising electricity prices on Republicans (and utilities)... but there is some work to do in communicating to voters that Republicans and utilities are actively working to make clean energy projects harder – and why that means higher prices.

The messaging should have three main prongs:

- 1. Remind voters that now is the time to be building more energy, not less – and that clean energy is cheaper and quicker to build than gas.**
- 2. Highlight Trump and Republicans' efforts to restrict clean energy and how those efforts are increasing electricity prices right now.**
- 3. Emphasize the role of monopoly utility companies and their greed in undermining clean energy and driving energy prices higher.**



CONFIDENTIAL. FOR RECIPIENT'S USE ONLY. UNAUTHORIZED USE, DISTRIBUTION OR COPYING IS PROHIBITED

Appendix

Demographics of Nationwide Registered Voters

Party ID

Democrats	38
Independents	22
Republicans	40

Gender

Men	47
Women	52

Race & Ethnicity

White	73
Total People of Color	27
<i>Black</i>	13
<i>Hispanic/Latino</i>	10

Age

18-29 year olds	17
30-44 year olds	25
45-54 year olds	15
55-64 year olds	16
Seniors 65+	27

Education

High school or less	30
Some college	37
College graduates	21
Post graduate	11

“Broader Costs” and “Trump Ideo” messages are much more polarizing than other messages

How convincing do you find each statement about why energy prices are rising?

Convincing & Believable Means (on a 0 to 5 scale)

Nationwide		Dem		Ind		Rep		
Convincing	Believable	Convincing	Believable	Convincing	Believable	Convincing	Believable	
3.57	3.57	4.14	4.17	3.44	3.52	3.08	2.99	[CE EDUCATION 1]
3.57	3.62	4.06	4.14	3.55	3.62	3.12	3.12	[UTILITY GREED]
3.55	3.58	4.13	4.07	3.58	3.75	2.98	3.02	[CE EDUCATION 2]
3.45	3.52	4.08	4.14	3.55	3.64	2.78	2.86	[MICRO COSTS]
3.42	3.45	4.27	4.27	3.28	3.35	2.65	2.69	[BROADER COSTS]
3.41	3.54	4.02	4.20	3.54	3.69	2.78	2.84	[TRUMP OIL]
3.41	3.50	4.08	4.17	3.45	3.60	2.73	2.79	[GOP AND O&G]
3.39	3.43	4.01	4.12	3.51	3.64	2.74	2.68	[PUSHING COAL]
3.34	3.44	4.04	4.09	3.33	3.49	2.68	2.78	[STATUS QUO]
3.33	3.38	4.24	4.12	3.16	3.35	2.52	2.66	[TRUMP IDEO]
3.30	3.44	3.99	4.18	3.23	3.46	2.69	2.71	[STRAIGHT GOP HIT]