

November 21, 2025

Rising Utility and Energy Costs Offer an Opportunity for Democrats Heading into the Midterms

Lessons from New Jersey and Virginia

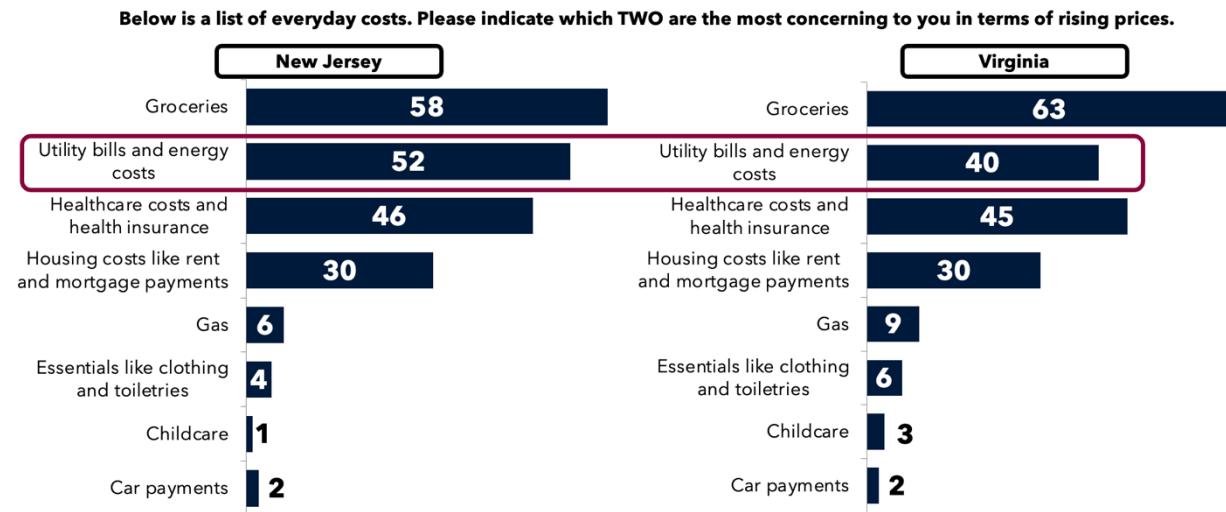
To: Interested Parties

From: Upswing Research & Strategy

Upswing Research & Strategy recently conducted a survey¹ in New Jersey and Virginia among those who voted in the general election showing voters' anxiety surrounding utility and energy costs and how voters rewarded candidates who effectively communicated their plans to lower them. Governors-elect Mikie Sherrill's and Abigail Spanberger's focus on utility and energy costs paid off, earning them historic margins. Democrats in Congress have the same opportunity, but they are not yet benefiting from the advantages that propelled the Governors-elect to victory.

Utility costs rank among the top concerns for these voters. A majority of voters in New Jersey say it's one of the two most concerning costs, while 40% of voters in Virginia say the same. Only the cost of groceries generated broader concern in both states.

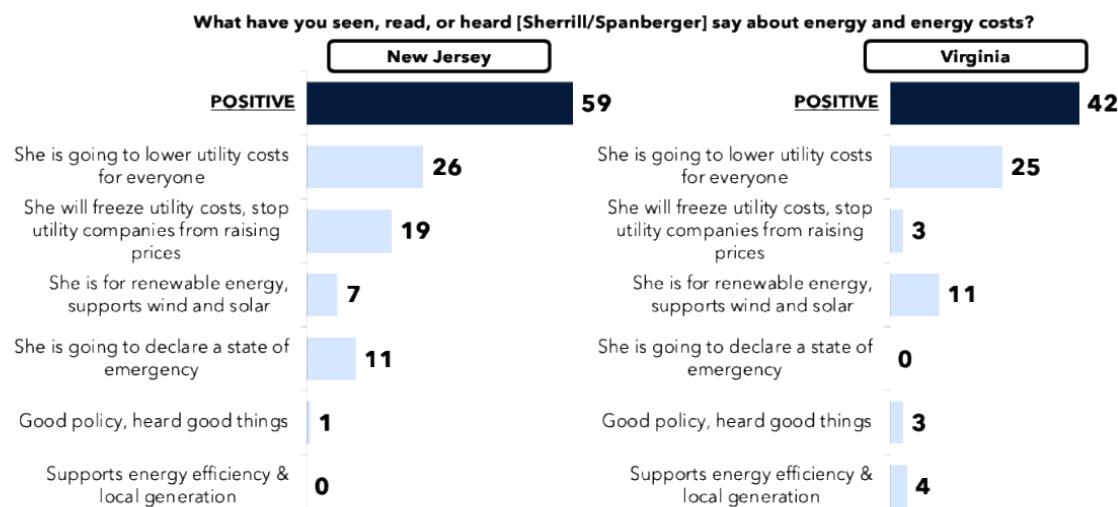
Figure 1: Top Concerns on Rising Prices



¹ Upswing Research & Strategy conducted a survey among 1,200 voters who voted in the 2025 general election across the states of New Jersey and Virginia from November 4-6, 2025. The overall margin of error is +/- 2.8% at the 95 percent confidence interval while the margin of error in each state is +/- 4.0%. We conducted interviews via online panel and SMS.

Voters also voiced strong positive, organic impressions of Sherrill's and Spanberger's plans for energy and utility costs. Nearly six in ten voters in New Jersey offered a positive impression of Sherrill's plan, saying that she will lower utility costs for everyone, freeze costs, support renewable energy, and declare a state of emergency, showing that her messaging broke through. A slightly weaker but still strong 42% said similar things about Spanberger. This shows voters were paying attention to the candidates' messaging and rewarded them.

Figure 2: Organic Impressions of Sherrill's and Spanberger's Plans for Energy and Energy Costs



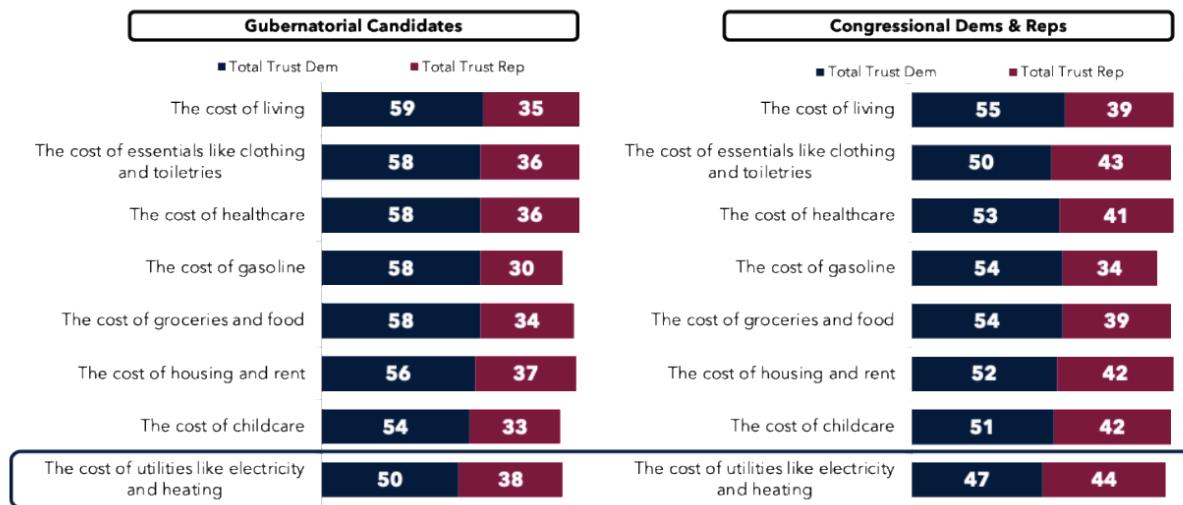
Still, Democrats in Congress have work to do to reach Sherrill's and Spanberger's trust on addressing costs of living. Both Sherrill and Spanberger enjoy much stronger trust than their Republican opponents on addressing various specific costs compared to Democrats in Congress over Republicans in Congress; Sherrill's and Spanberger's trust on utility costs is a net +9 over Democrats in Congress.

There's a clear opportunity for Democrats in Congress to take advantage of Trump's actions driving up utility costs. Nearly two thirds of voters in both states have heard of Trump's plans to cancel new energy production that involve solar and wind—64% in New Jersey and 63% in Virginia say they have heard a lot or some about these cancellations. An identical 61% in both states say they oppose the energy project cancellation, with 44% in New Jersey and 42% in Virginia opposing the cancellations strongly.



Figure 3: Sherrill and Spanberger's Trust on Addressing Costs Compared to Democrats in Congress

Now I want to ask about a few everyday costs that people pay. Please indicate who you trust more on handling each cost, (Sherrill/Spanberger) / (Democrats in Congress) or (Ciattarelli/Earle-Sears) / (Republicans in Congress)



Democrats have an opportunity to replicate Governors-elect Sherrill's and Spanberger's wins next year if they focus on addressing cost of living concerns, especially the rising cost of utilities and energy. Right now, however, they still have work to do. There is still time to home in on this top concern for voters, but if Republicans get there first, it could turn into a liability.

