



Utility Bills, Clean Energy, and Electoral Opportunity in 2026

Strategic findings from qualitative and survey research with registered voters nationally



Overview of the Research



Phase 1: Qualitative

Online Discussion Boards conducted November 10-13, 2025 among three voting segments:

- Democrats
- Independents
- Republicans
- All voters residing in battleground congressional districts



Phase 2: Survey

Online survey conducted January 12-18, 2026

- 2,710 registered voters nationwide
- Including 408 interviews in battleground congressional districts; and
- 357 interviews in the areas of the country with the highest 2025 electricity rate increases

Key Takeaways

1

Utility bills have joined groceries as a top-tier issue in the affordability crisis.

2

There is both a need *and* an opportunity for Democrats to lead on energy costs: Voters view clean energy as one of the few sectors actually helping to lower costs by stabilizing prices and expanding supply at a cheaper and faster rate.

3

Voters strongly oppose Trump and Republicans taking affordable clean energy off the grid and believe this makes the affordability problem worse.

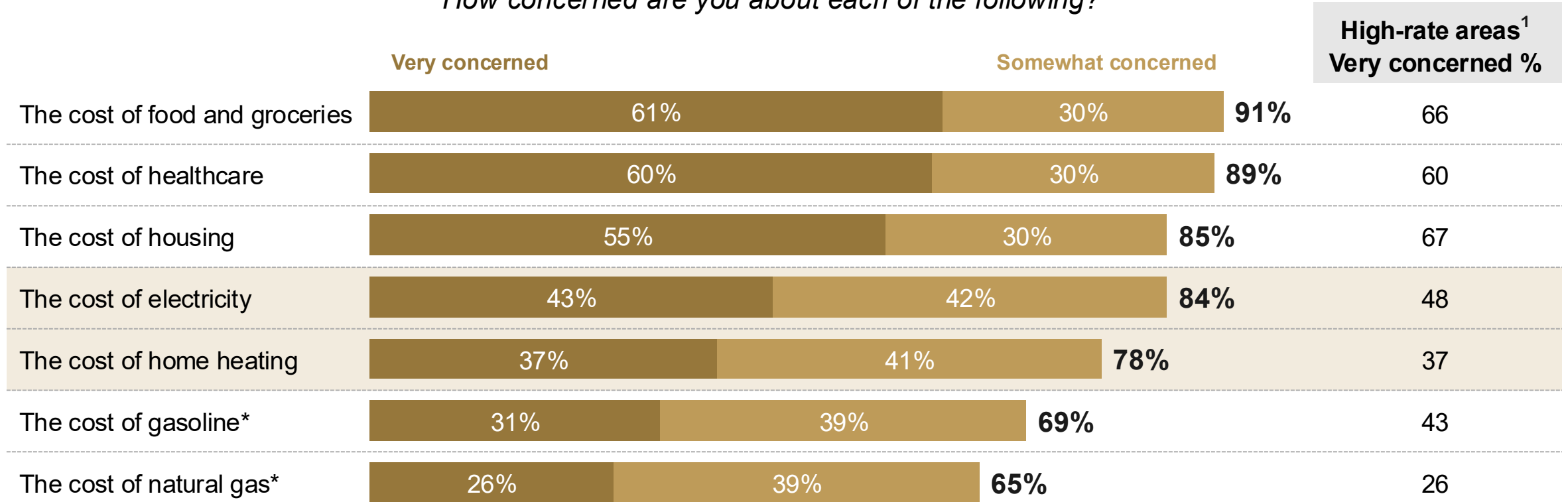
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Utility companies send the bills and get automatic blame; Democrats gain resonance when they show they're willing to stand up to utilities and side with consumers.

Rising electricity bills have become a major pressure point in the broader cost-of-living crisis.

Americans continue to face serious cost pressures on many fronts; home energy costs are part of the problem.

How concerned are you about each of the following?



Energy Affordability Swing Voters:

42% of swing voters are very concerned about the cost of electricity

Qualitative: While groceries, housing, and health care dominate initial cost concerns, utility bills emerge consistently as an unpredictable source of stress.

- Rising utility costs, coupled with inflation in housing, groceries, and gas, create a state of financial precariousness for many participants.
- Energy bills are identified as essential, non-negotiable expenses that fluctuate wildly and consume a significant portion of household budgets, resulting in difficult trade-offs with other core necessities like food.
- Most report about 5-10% of budgets going toward energy costs, with gas customers much less concerned about electric prices, but often spending 15-20% of their budget or more between gas and electric. Seasonal and regional variations are significant.
 - Participants in the Midwest, particularly electric-only households in central states (IA, OH), tend to report lower bills and less acute concern.

“Literally everything is more expensive so **all of my expenses have gone up to some degree**. I notice the changes as I see that I am saving less and have less left over each month.” – 49 M, WI

“**Energy bills are always curious** and that can be hard to pinpoint whether it's seasonal, our usage, or external increases.” - 38 M, OH

“I am concerned about several things surrounding the economy; the costs of everyday goods such as groceries is of major concern....**With my budget I don't have any wiggle room to afford a large electricity bill** and it has been very challenging to balance the cost with my needs.” - 60 F, NC

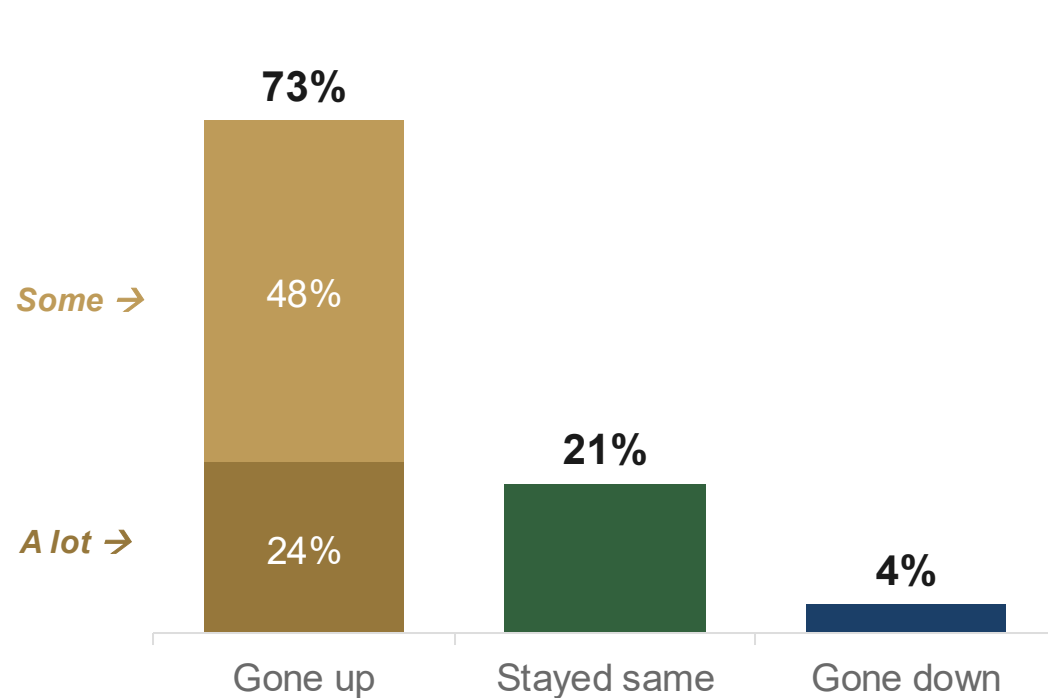
“In my day-to-day life right now, the most important thing is **inflation and the general cost of goods** (gas, groceries, etc) because these are my main expenses other than my rent.” - 24 F, WI

“The cost of living is affecting me because of everything is going up at least 10% or more! **My annual raise doesn't match the cost of living and I have to stop spending or cut cost to make it every month** or work a 2nd job to make ends meet as a single household provider.” - 47 F, CA

“The other bills that I pay close attention to are my utility bills. **My Con Edison bill is outlandish** and continues to be ridiculously high.” – 48 M, NY

Rising electricity costs are felt broadly across the country, not just in areas with the highest rate increases.

Specifically in your own household, over the past year would you say the cost of utilities like electricity and heating has gone up, stayed about the same, or gone down?



	Total gone up %	Gone up a lot %
Democrats	80	27
Independents	69	27
Republicans	67	21
Northeast	80	33
South	67	22
Midwest	77	21
West	71	23
Battleground CDs	73	21
High-rate areas	73	26

Qualitative: Reviewing utility bills evokes strong negative emotions across all party lines, including fear, frustration, and anger, largely driven by the perception that they lack control over the costs.

- Participants across party lines report feelings of frustration and anger when reviewing their ever-increasing utility bills.
- Much of this frustration stems from not understanding the pricing structure of their bills or not seeing any decrease when participants commit to conservation efforts.
- Nearly all participants report making changes to try and bring their bills down and are even more angered when bills continue to rise.
 - Changes include keeping heat/AC lower than comfortable, monitoring off-peak usage, reducing energy-intensive appliances, and cutting leisure and recreation spending to accommodate utility bills.
 - Participants who have solar panels are reporting financial challenges with aging technology and hardware costs.

“I feel frustrated sometimes. This is something that I’m paying for a not seeing a physical item in return. But I don’t get too upset as I know this is something that I have to pay and my electric supplier does a great job of breaking down the bill.” – 39 F, PA

“I am wondering more and **more if there is anything I can do to lower our bill,** maybe do less with the heater over the winter season.” - 61 F, AZ

“How is this ok? Who can afford this? **The feelings are of frustration and confusion.** Those feelings are driven by not being able to get any real answers and not being able to get any real help in fighting against these increases.” - 38 M, CO

“The last few times I reviewed my energy bill, I felt frustrated because **for the same level of service I am being charged more. And, there is no clear explanation provided about why rates are so high.**” - 41 M, CA

“Whenever I view the electricity bill **its like a horror movie,** you don’t want to look but you have to.” -52 F, AZ

“I feel like I’m not shocked by the price increase but **it does make me more aware of the amount of lights that I have on and the temperature that i keep my thermostat on.** I mean it is what it is. I have to have electric.” – 38 F, OH

Qualitative: Many attributed rising energy costs to factors beyond their direct control, often pointing to utility companies, corporate greed, and broader economic and technological forces.

- Participants largely pointed to utility companies as the source of increasing prices, such as additional service charges and fees. Many also mentioned corporate profit-seeking and monopolization.
- Outside of utility companies and corporations, many cite aging infrastructure requiring expensive upgrades as well as increased demand from AI/data centers, EVs, climate change.
- Participants emphasize that bills rise independent of their personal usage because companies are setting the fees and passing costs to consumers rather than absorbing them into profits. The disconnect between conservation efforts and bill reduction is the most frustrating aspect—voters feel they're doing everything right but seeing no benefit.
- At this point, there is minimal partisan blame in any group, suggesting this is seen as more systemic/economic than political.

“I feel that **the energy companies are responsible for the rising costs because they are not regulated properly.**” – 48 M, NY

“**Corporate greed and divestment in renewable energy are the primary reasons** I believe this is occurring.”- 31 M, CO

“I do think energy costs are rising but I **attributed it to inflation.**...The company has to make money and pay its employees a fair wage and **I guess part of doing that is raising prices.**”- 42 F, IA

“I do feel that the costs are rising. I feel that **it has to deal with different tariffs that have been put in place. The electric company has to recoup costs somehow** so they pass that on in price increases for the service.”- 46 F, IA

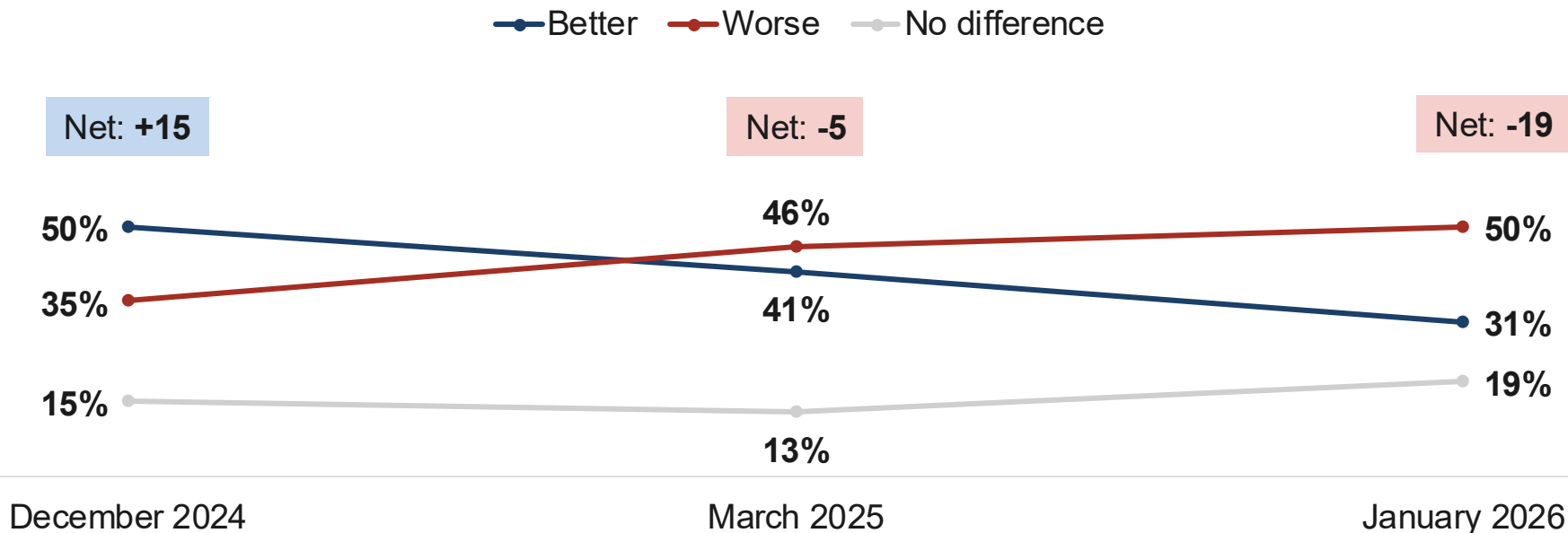
“I believe the primary reason for this has been **greed and a lack of humanity.** Energy is a necessity in the modern world and it shameful that companies still increase prices while the citizens are hurting economically.” -32 M, MI

“I definitely do believe energy costs are rising. I think what is contributing is **profit motive by the utility as well as an aging infrastructure** that is costing more to maintain and upgrade.” – 65 M, MI

After a year in power and prices still high, trust in Trump and Republicans on energy costs has collapsed, creating space for Democrats to lead—but voters need to hear from them on this topic.

Americans now believe Trump is making energy prices worse, a complete reversal from what they expected just a year ago.

Do you think Donald Trump is making things better or worse for consumers when it comes to energy prices?

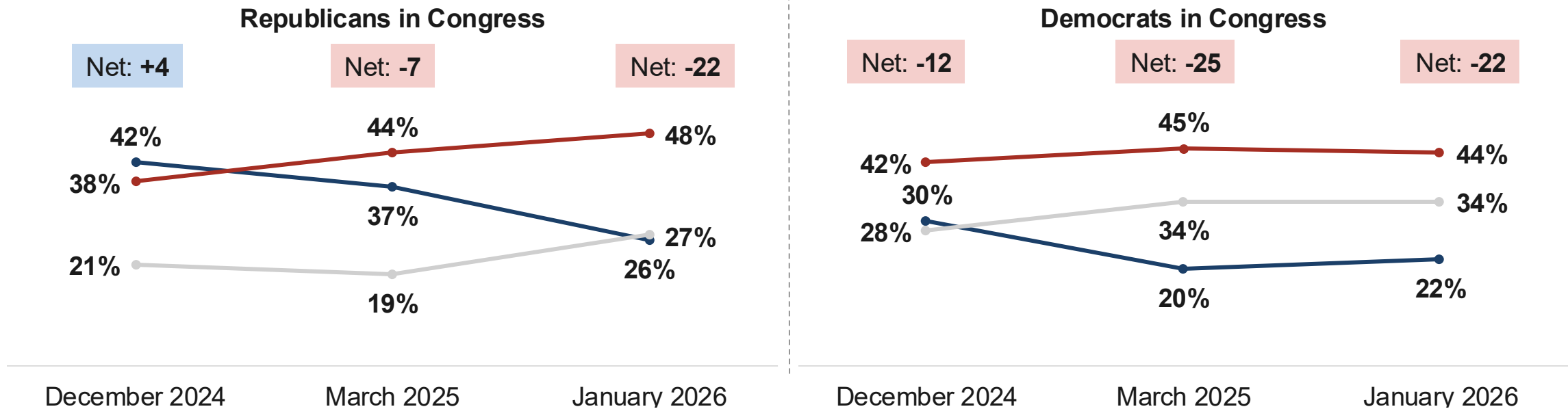


Trump lost the most ground among Americans under age 50 (-5 in Dec '24 → -25 Jan '26), Republicans (+65 → +39), and those without a college degree (+3 → -23).

With more people now putting Republicans in ‘making things worse’ camp, Congressional Democrats have a clear opening—and need—to fill this gap and claim the energy-affordability high ground.

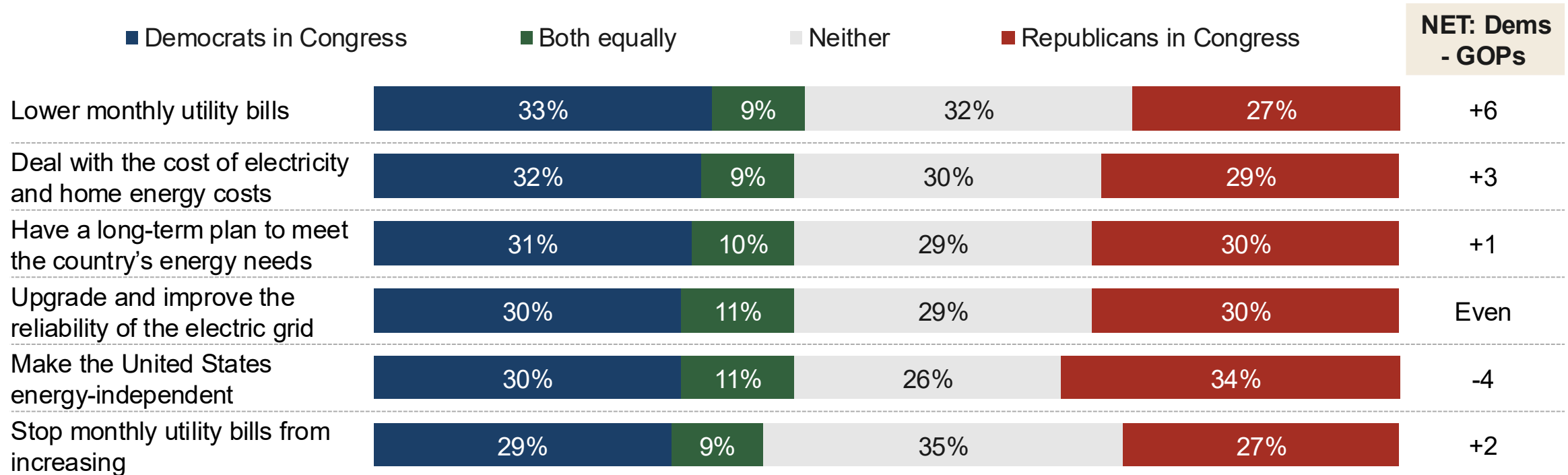
Please indicate whether you think each of the following is making things better or worse for consumers when it comes to energy prices.

— Better — Worse — No difference



Democrats currently have a slim advantage on lowering monthly utility bills, but many voters trust neither party.

Who do you trust more to do each of the following?*



Results are consistent when framed as “Donald Trump and Republicans in Congress,” with one exception: voters give Republicans a +10 advantage on *energy independence* when Trump is included.

“Lowering utility bills” is our most credible point of entry across key audiences, and a foundation for Democrats to build greater trust.



“Lower utility bills” is Democrats’ strongest frame across nearly every key audience

Independents, swing voters, cost-concerned voters, Black and white voters, high-cost areas, all regions, all ages.



“Lower utility bills” is consistently better for Democrats with these groups than “stop bills from increasing”.



But distrust and cynicism is high

50+% of independents and undecided/leaning on congressional vote trust neither party across energy issues

Utility companies send the bills and get automatic blame for high costs; Democrats need to be seen as holding them accountable and standing with consumers.

Qualitative: There are some differences based on partisanship on who to blame for rising utility costs, but energy companies bear the brunt of the responsibility across party lines.

- Republicans are most likely to view costs as consequences of personal choices or something they've prepared for. They also blame energy companies for profit-maximization and delaying infrastructure upgrades, with some citing lack of domestic energy production and reliance on foreign oil. Very few exclusively blame Democrats or clean-energy mandates.
- Democrats emphasize systemic factors beyond personal control, with strong focus on corporate profits, monopolization, data centers, climate change driving AC demand, and infrastructure underfunding. Some attribute rising costs to federal government policy and tariffs.

I hold **the power companies and the government responsible** at both the federal and state level. - 56 M, NJ

"I believe the **government is responsible for these rising energy costs because they are not doing enough to keep them down**. All of these countries surrounding us that are fighting all the time are not helping the situation either." - 57 F, WI

"I don't believe my energy bills have changed all that much over the last year. As a percentage of my household budget, **I am spending approximately the same amount on my energy bills as I have in the last couple years.**" – 55 M, OH

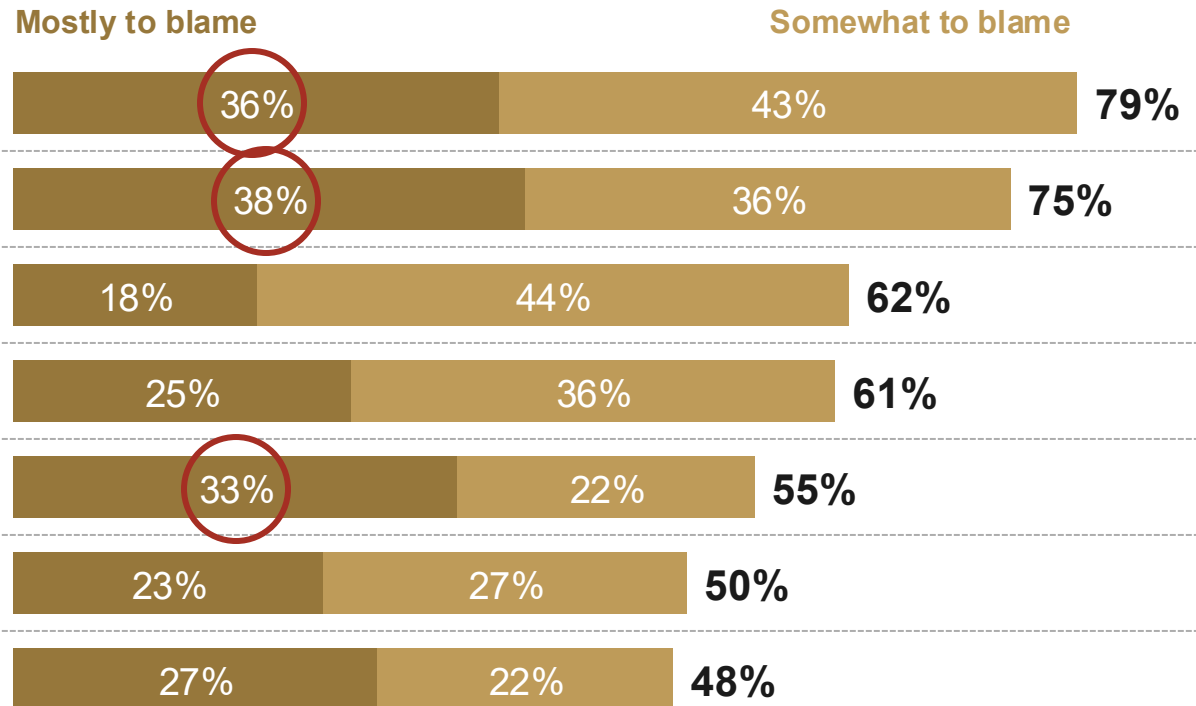
"I feel that it's the **power companies are greedy**. So, they know that we need power so they do what they can to get every penny out of us." - 51 M, NC

"**I do not place blame on any one person or group**. It is simply what it is and unless I am willing to live off grid then I will have to pay." -41 M, PA

"I do agree these prices have increased but I do not believe unreasonable or unrealistic as much as food prices! **I think the increase is due to normal rising costs of living**" – 39 F, AZ

Utility companies and state regulators draw the most blame for rising costs. GOP canceling clean energy is blamed more than Democrats “mandating” it.

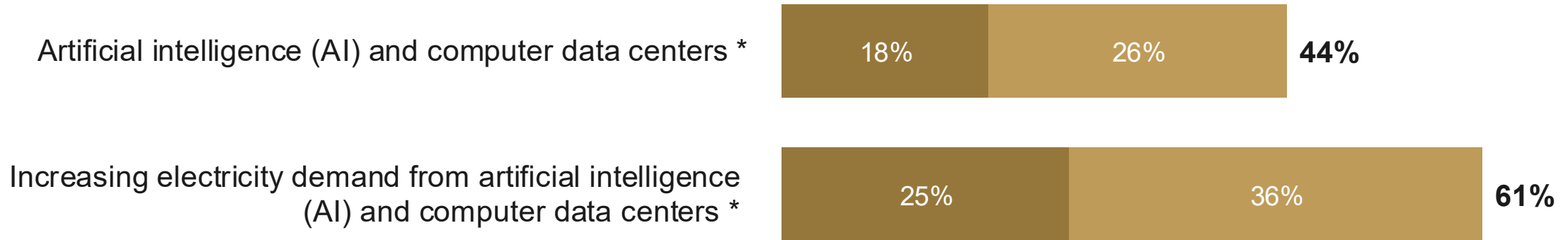
How much blame do you think each of the following deserves for rising electricity bills and home energy costs?



AI and data centers draw real blame when people understand how they affect DEMAND.

How much blame do you think each of the following deserves for rising electricity bills and home energy costs?

■ Mostly to blame ■ Somewhat to blame



Only 4% volunteer AI/data centers are to blame in an open-ended question.

Positive Messaging for Democratic candidates and groups supporting them:
The central point to make is that bringing down energy costs is part of the bigger cost-of-living fight.

Our Testing Protocol for Positive Democratic Messages

We tested 13 “statements you might hear from a Democratic candidate running for Congress”

Message themes

- General cost of living
- Consumer control of electricity bills
- Long-term advantages of clean energy
- Utility company accountability
- Need natural gas now but focus for future should be clean energy
- Clean energy best for country’s growing energy needs
- Data center accountability
- Bring down energy costs with competition
- Don’t prop up fossil fuels
- Costs of extreme weather
- Other countries expanding clean energy
- Anti-utility monopoly
- Anti-Trump

Tested Two Ways

Individual ratings: How persuasive each statement is as reason to support a Democratic candidate?

MaxDiff: Messages shown in groups of 4, choose most and least persuasive from each group. A score above 100 means a message is more persuasive than average.

Bull's Eye Message for Elevating Democratic Candidates: Clean energy is part of making life affordable again.

Pairing cheaper, cleaner energy with lowering other every-day bills is the best-testing pro-Democratic message across the board, scoring over 170 with key audiences: congressional movers, undecided voters, low-propensity Democrats, and battleground district voters (especially independents).

[GENERAL CoL] Our number one priority is to make life affordable for people again. That means lowering the cost of housing, groceries, childcare, and electricity. We can bring down electricity bills by increasing our use of cheaper, cleaner energy.

MaxDiff Score*	% Very Persuasive
167	37%

The affordability narrative is underlined by supporting messages that show Democratic candidates as consumer champions and checks on utility company excesses.

The utility accountability and consumer control messages are especially compelling to turnout audiences: low-propensity Democrats, Black voters, young voters, and non-college women.

		MaxDiff Score*	% Very Persuasive
<i>Helps consumers process—and have some agency in—an inflationary environment run amok.</i>	→ [CONSUMER CONTROL] Electricity bills keep rising, and many families see jumps from month to month, sometimes by \$50 or \$150 or more. Bills are so unpredictable because global oil and gas prices swing wildly from week to week. The best way to give people control over their bills is to invest in lower-cost wind and solar energy, made here in the United States.	118	29%
<i>Forward-looking and optimistic: clean energy is good for consumers now and better going forward.</i>	→ [LONG-TERM GAIN] Clean energy is the smart choice now and for the future. Wind and solar come from sources that do not run out, and new technology keeps driving costs down. That means more affordable and reliable electricity over the long term.	117	32%
<i>Positions Democratic candidates as the best defenders against the biggest villain in this fight.</i>	→ [UTILITY ACCOUNTABILITY] Electric utility companies have been gouging customers with steep rate hikes while making excessive profits. These companies need to be held accountable and share responsibility for spikes in fuel costs, instead of forcing costs onto consumers.	115	38%

Going on offense against GOP officeholders:
The primary message should be that energy bills have gone up on Republicans' watch while they have intentionally taken energy off the grid.

Our Testing Protocol for Republican Accountability Messages

We tested 11 “things you could learn about a Republican candidate running for Congress”

Message Themes

- Costs rising + cutting clean energy jobs
- Promising and failing to bring energy costs down
- In the pocket of tech companies
- In the pocket of utility companies
- Pushing fossil fuel dependence
- Pushing unpredictable natural gas
- In the pocket of oil & gas companies
- Promising “all of the above” but cutting clean energy
- Losing to China
- Cutting supply while demand goes up
- Trump’s wild claims about clean energy

Tested Two Ways

Individual ratings: How concerning respondents found each statement to be?

MaxDiff: Messages shown in groups of 4, choose most and least concerning from each group. A score above 100 means a message is more concerning than average.

We have receipts: The top two messages tested (a) cite a 13% increase in electricity bills and (b) pair cost increases with a related sin.

These are consistently the top two messages, including with key audiences: congressional undecided voters, congressional movers, low-propensity Democrats, and battleground CD voters.

	MaxDiff Score*	% Very Concerning
[CLEAN ENERGY JOBS + COSTS] Republicans supported cancelling 300 clean energy projects, including many in [STATE] that would have helped lower energy bills. This decision killed thousands of good jobs , while Americans' energy bills have increased 13% in the past year.	133	52%
[PROMISES IGNORED] Republicans promised to immediately lower the cost of living if they were elected. After a year of full control in Washington, electricity bills have gone up 13%--more than four times the rate of inflation--and they're making it worse by turning off energy if it comes from clean sources .	123	51%

Broad-based Secondary Message: Show that Republicans are working for the wrong people on energy costs.

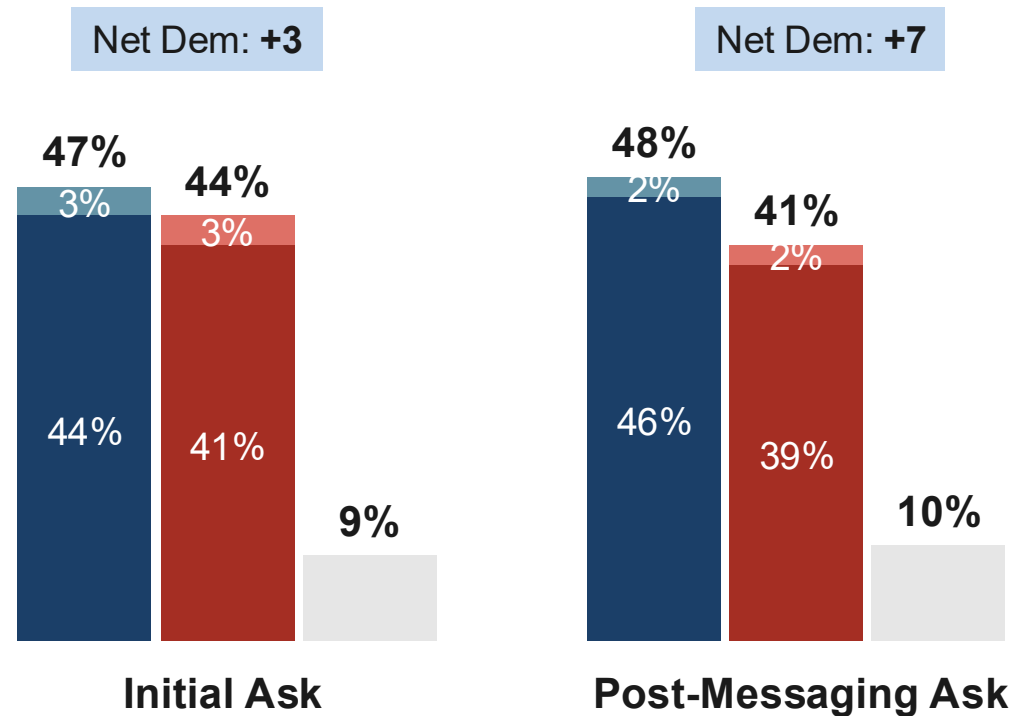
These are broadly concerning (including to many centrist Republicans in the case of “Utilities”) and fit well with the narrative that utility and AI companies are the big villains on this issue. Note: with younger voters tech companies are the more compelling villain.

	MaxDiff Score*	% Very Concerning
[TECH COMPANIES] Republicans are in the pocket of big tech companies, letting AI, crypto and data centers use massive amounts of electricity without paying their fair share. Regular people are stuck with higher bills, and Republicans are making it worse.	107	51%
[UTILITIES] In the last election, electric utility companies gave millions to Republican candidates. Since then, utility companies made record profits while gouging families with higher electricity bills month after month, with no accountability.	105	57%

Messaging successfully moves the generic ballot Democrats' way.

Generic Congressional Vote

■ DEM ■ Lean DEM ■ Lean GOP ■ GOP ■ Undecided



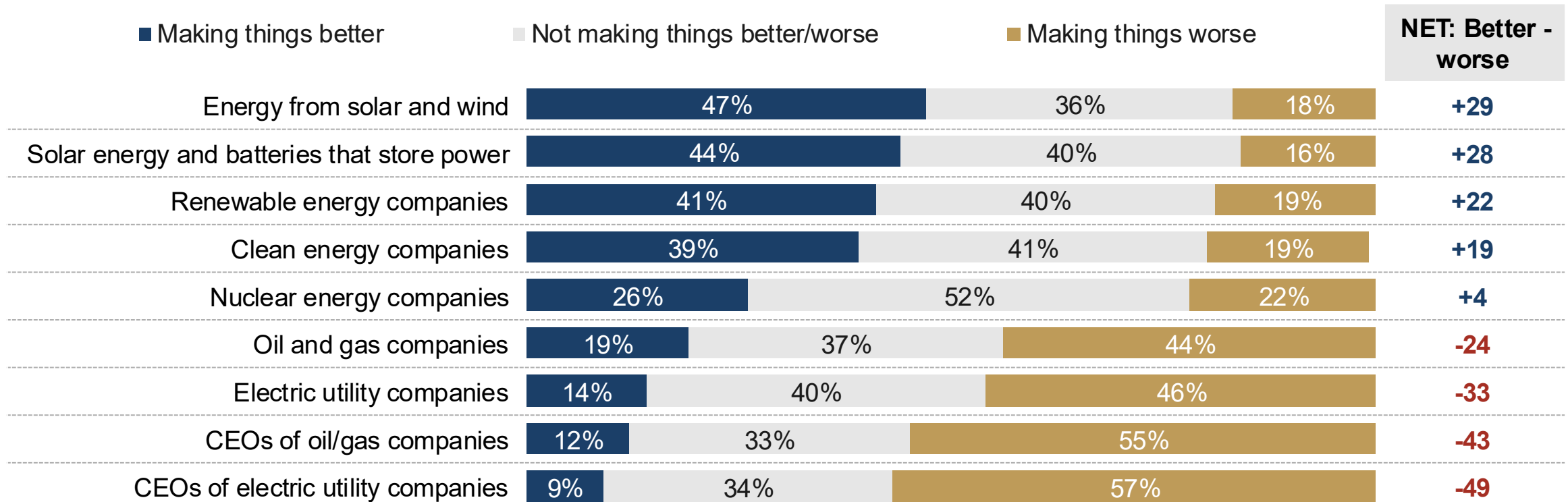
Biggest Movers

	Initial Dem advantage	Post-messaging Dem advantage	Net Shift
High rate areas	+6	+15	+9
Battleground CDs	+4	+12	+8
BG independents	+17	+27	+10
BG white voters	-5	+5	+10
Latino voters	+14	+21	+7
Men under 50	Even	+7	+7
Non-college men	-10	-4	+6
Non-college women	+8	+13	+5

Anger over energy costs gives us a great opportunity to build upon warm feelings toward clean energy and position it as a key solution to high utility bills.

Clean and renewable energy stand out as the rare allies for consumers.

Please indicate whether you think each of the following is making things better or worse for consumers when it comes to energy prices.



“Renewable” holds a small affordability advantage over “clean” with select audiences, but both are effective.

NET Impact on energy prices for consumers: Making things better – Making things worse

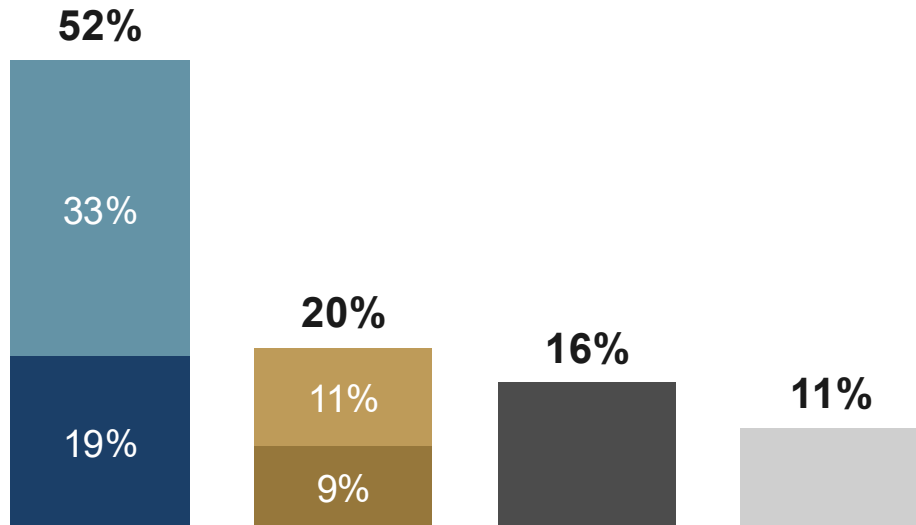
	Democrats	Independents	Republicans	Battleground CDs	High-rate areas
Renewable energy companies	+39	+23	+5	+29	+38
Clean energy companies	+40	+7	+2	+26	+27
Nuclear energy companies	-9	-11	+22	+4	+4
Oil and gas companies	-53	-26	+5	-30	-27
Electric utility companies	-47	-33	-19	-28	-28
CEOs of oil/gas companies	-64	-41	-23	-54	-52
CEOs of electric utility companies	-60	-49	-38	-60	-53

Clean energy gets the benefit of the doubt on costs; it must be reinforced given that many are unsure or skeptical.

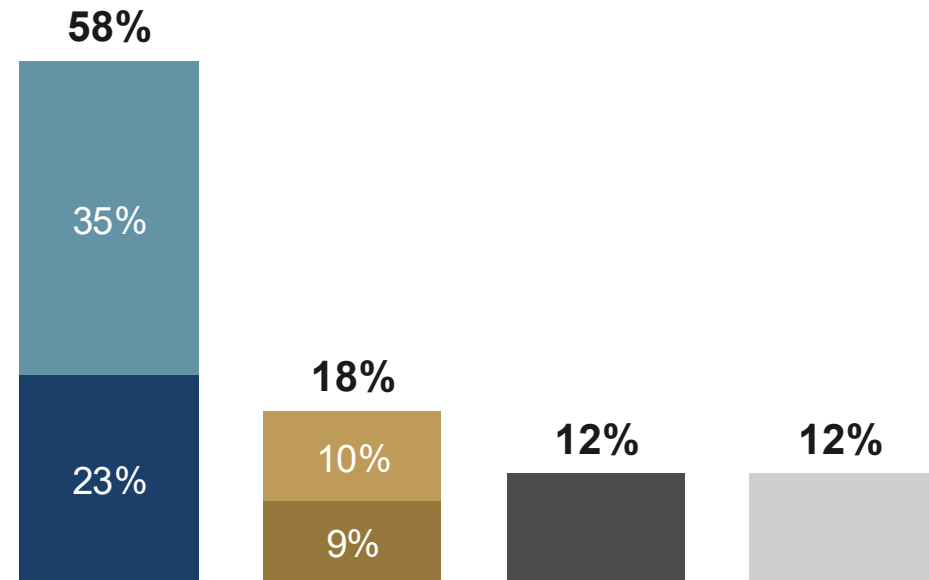
If the United States produces and uses more energy from clean sources like wind and solar, how would this affect energy affordability ... ?

■ Much more affordable ■ Somewhat more affordable ■ Somewhat less affordable ■ Much less affordable ■ Would make no difference ■ No idea

In the next one to two years

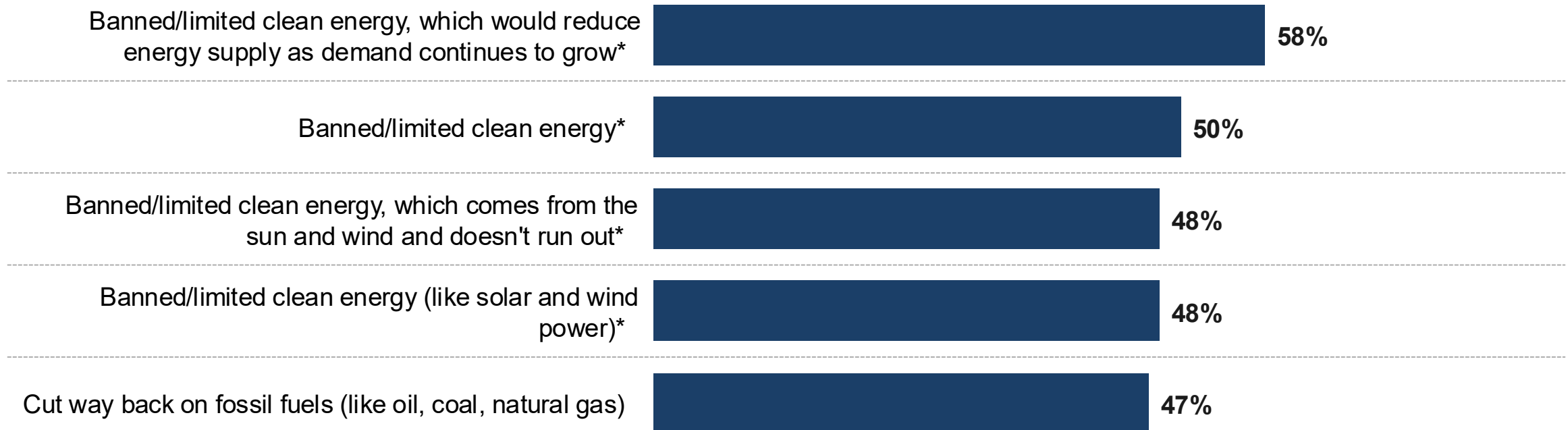


Over the next 10 years



Citing diminished supply helps make the case that throttling clean energy will raise costs.

% saying it would increase electricity costs if the United States took this action



Appendix

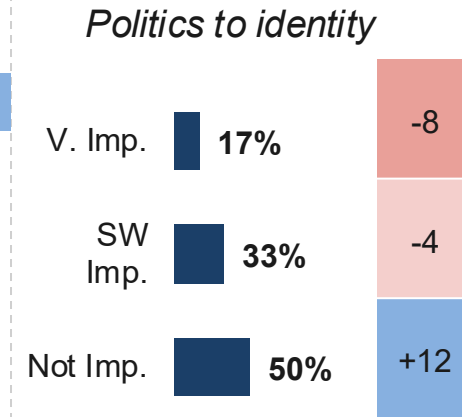
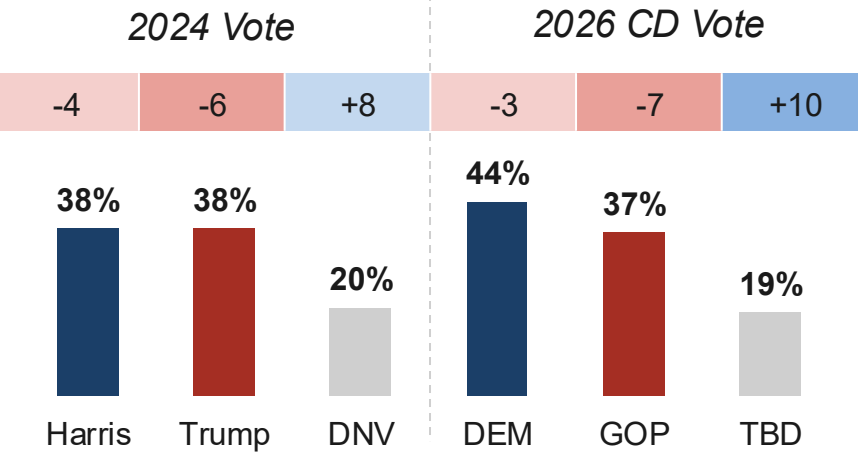
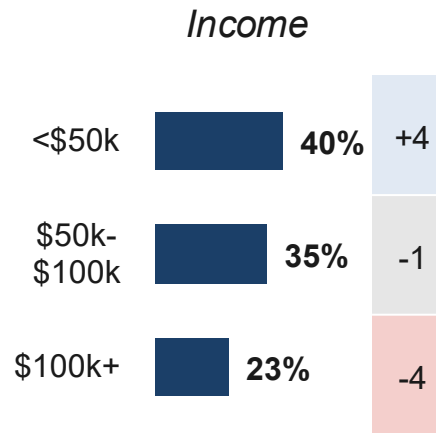
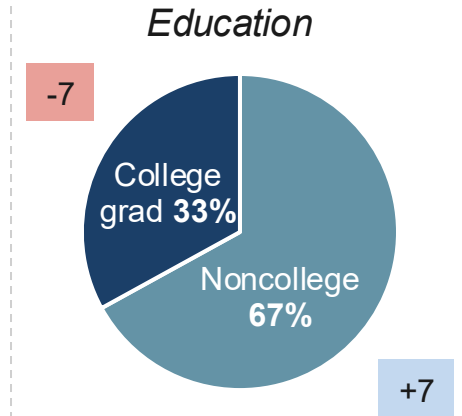
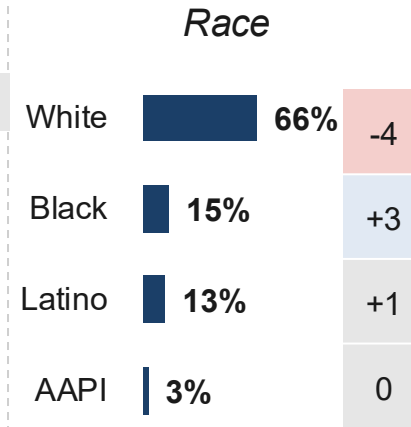
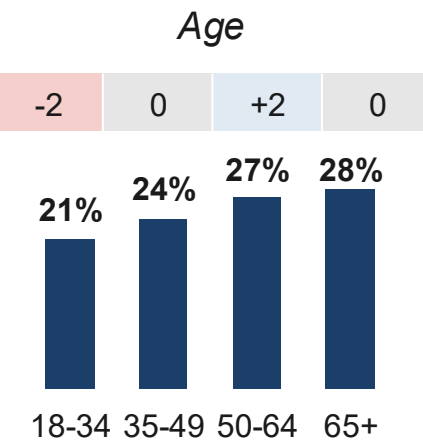
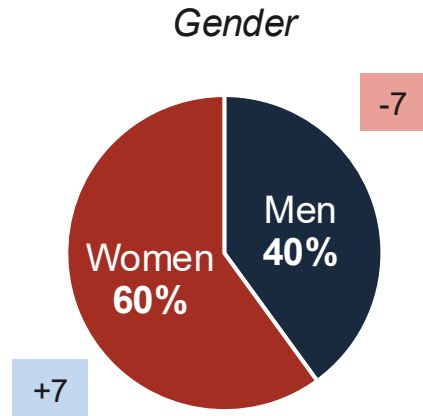
Compared to the electorate overall, cost-conscious swing voters skew women, noncollege, and less engaged with politics.

Diff: Cost-concerned swing voters v. all registered



19% of electorate are swing voters who are very concerned about electricity

- Independents or soft partisans
- Moderate or somewhat liberal/conservative
- Very concerned about electricity costs



Cost-conscious swing voters' attitudes toward energy compared to RVs overall shows heightened anger at utility companies.

Diff: Cost-concerned swing voters v. all registered



Top GOP messages MaxDiff

CE JOBS + COSTS	136	+3
PROMISES IGNORED	123	0
UTILITIES	112	+7
TECH COMPANIES	110	+3

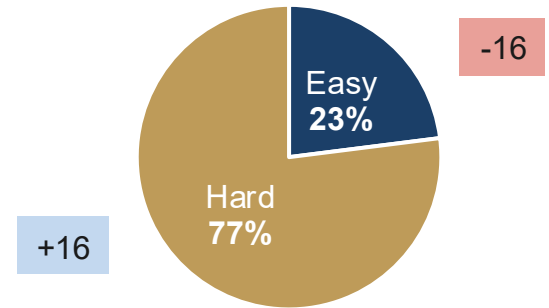
Top Dem messages MaxDiff

GENERAL CoL	185	+18
UTILITY ACCOUNTABILITY	133	+18
CONSUMER CONTROL	130	+12

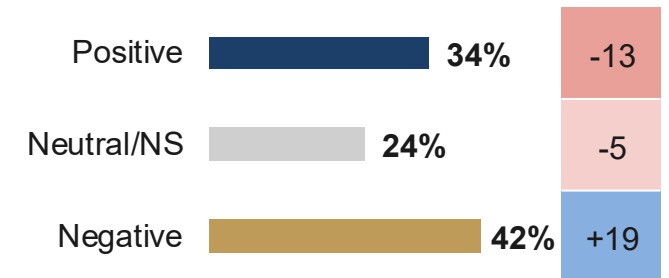
Making energy costs worse

CEOs of electric utility companies	70	+13
CEOs oil/gas	66	+11
Electric utility companies	62	+16
Trump	57	+7
GOP in Congress	55	+7
Oil/gas companies	53	+9
Democrats in Congress	47	+3
Nuclear energy companies	27	+5
Clean energy companies	22	+2

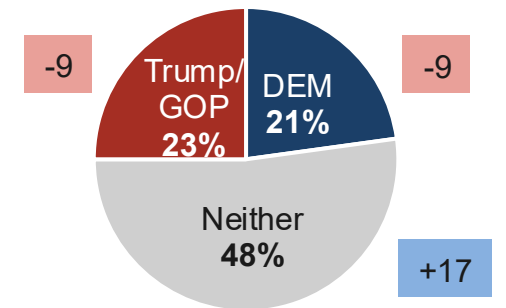
Making ends meet



Feelings toward electric utility provider



Trust to deal with cost of electricity/home energy



Appendix: Battleground CDs

- **Arizona:** AZ-1, AZ-6
- **California:** CA-22, CA-40, CA-41
- **Colorado:** CO-3, CO-8
- **Iowa:** IA-1
- **Michigan:** MI-4, MI-7
- **New Jersey:** NJ-7
- **Nevada:** NV-2
- **New York:** NY-17
- **Ohio:** OH-15
- **Pennsylvania:** PA-7, PA-8, PA-10
- **Wisconsin:** WI-3

Appendix: High-cost areas

Participants in high-cost areas were targeted by counties where these providers operate and confirmed via self-report to their respective utility company. *Source: [Climate Power](#)*

Provider	State(s)	Annual Rate Increase
Consolidated Edison	New York, New Jersey	\$557.04
Ameren	Illinois	\$540.00
South California Edison	California	\$396.00
Duke Energy Florida	Florida	\$388.80
Atlantic City Electric	New Jersey	\$336.24
Idaho Power	Idaho, Oregon	\$259.92
Appalachian Power	West Virginia, Virginia, Tennessee, North Carolina	\$252.00
Puget Sound Energy	Washington	\$249.00