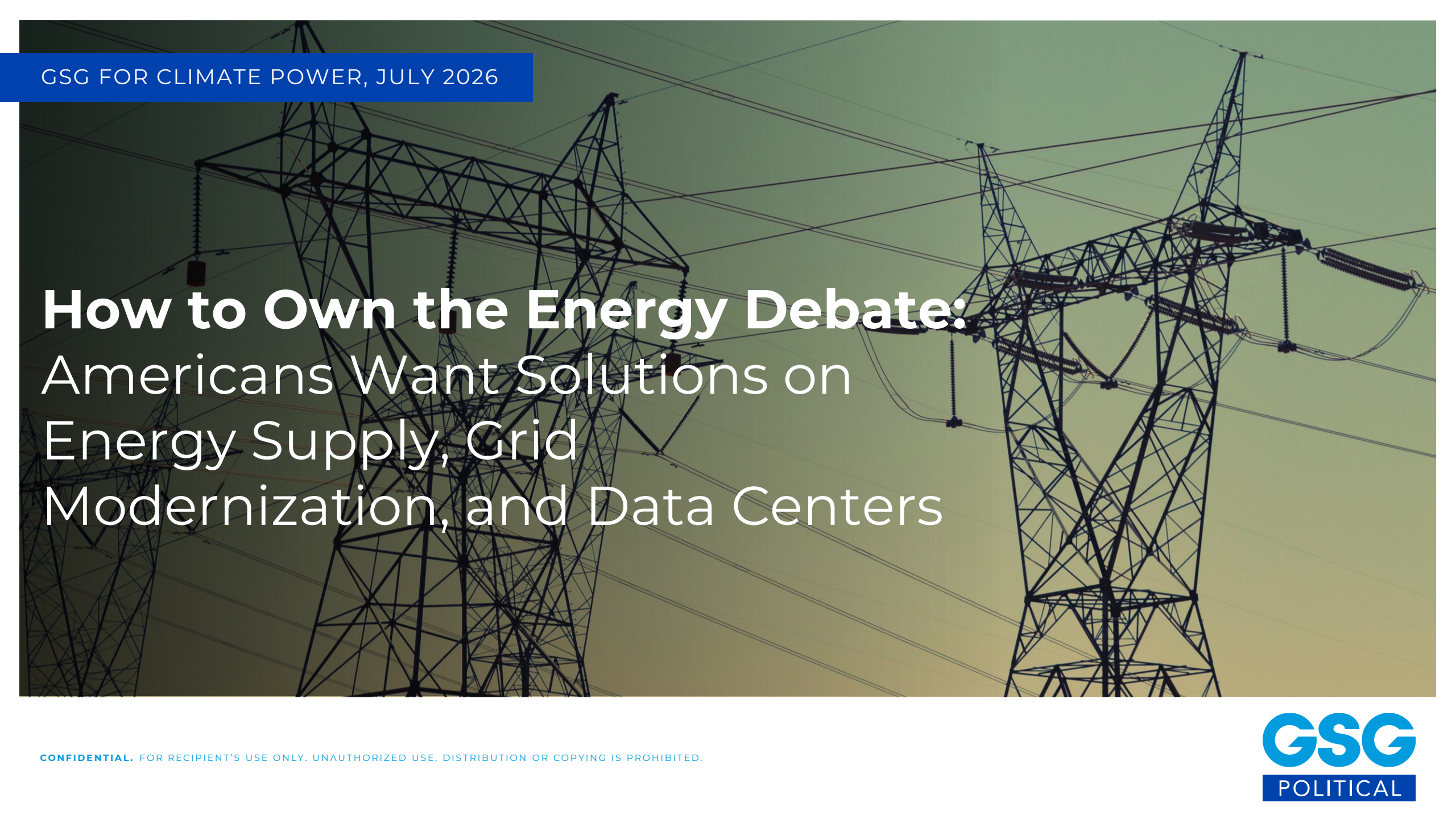




GSG FOR CLIMATE POWER, JULY 2026

How to Own the Energy Debate:

Americans Want Solutions on
Energy Supply, Grid
Modernization, and Data Centers

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Methodology

Voters

Global Strategy Group conducted a survey of **2205 registered voters nationwide** between June 22 and June 29, 2026, including a base sample of 1000 voters and oversamples to reach the following sample sizes:

- 430 Black, 332 Hispanic, and 151 AAPI voters
- 357 self-identified independent voters
- 481 urban voters in states with Democratic governors
- 382 urban voters in states with Republican governors
- 401 voters in states with lean/likely Democratic governor races in 2026 (MI, CA, CO, ME, NM, MN)
- 314 voters in states with tossup governor races in 2026 (AZ, GA, IA, NV, WI)
- 304 voters in states with lean Republican governor races in 2026 (KS, OH)

Margin of error

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

The margin of error on sub-samples is greater.

- Black voters: MoE +/- 4.7%
- Hispanic voters: MoE +/- 5.4%
- AAPI voters: MoE +/- 8.0%
- Independent voters: MoE +/- 5.2%
- Urban Dem governor state voters: MoE +/- 4.5%
- Urban GOP governor state voters: MoE +/- 5.0%
- Lean/likely Democratic state voters: MoE +/- 4.9%
- Tossup state voters: MoE +/- 5.5%
- Lean Republican state voters: MoE +/- 5.6%

Key Findings

1

Costs remain the lens through which voters understand the energy debate, but the debate itself is evolving.

As concerns about the war with Iran evolve, voters do not so singularly blame global conflict for rising energy bills. Instead, frustration is shifting toward politicians who fail to act, utility companies seen as prioritizing profits, and increasingly, data centers that are perceived as driving up electricity demand and household costs.

2

Public opinion on data centers has undergone a significant shift since April, with support dropping across the board.

What was once a more neutral issue has become a growing, major political liability, with voters increasingly seeing data centers as driving up electricity demand, raising household utility bills, and threatening grid reliability. This reflects a broader shift in public sentiment and creates one of the clearest openings for this agenda.

3

The combined agenda of expanding clean energy with battery storage and upgrading transmission lines begins in a strong position.

Transmission performs slightly better because it attracts broader bipartisan support, but voters naturally associate both policies with creating jobs, improving reliability, and increasing electricity supply. While many connect clean energy with helping the environment, few see either policy as significantly addressing climate change.

4

The biggest obstacle to getting support for policies to upgrade the grid and expand clean energy is the fear that families will end up footing the bill.

Voters' primary hesitation about expanding clean energy and modernizing the grid is that the costs will ultimately be passed on to them through higher utility bills. They are much more comfortable when the costs are placed on data centers and other large energy users instead.

5

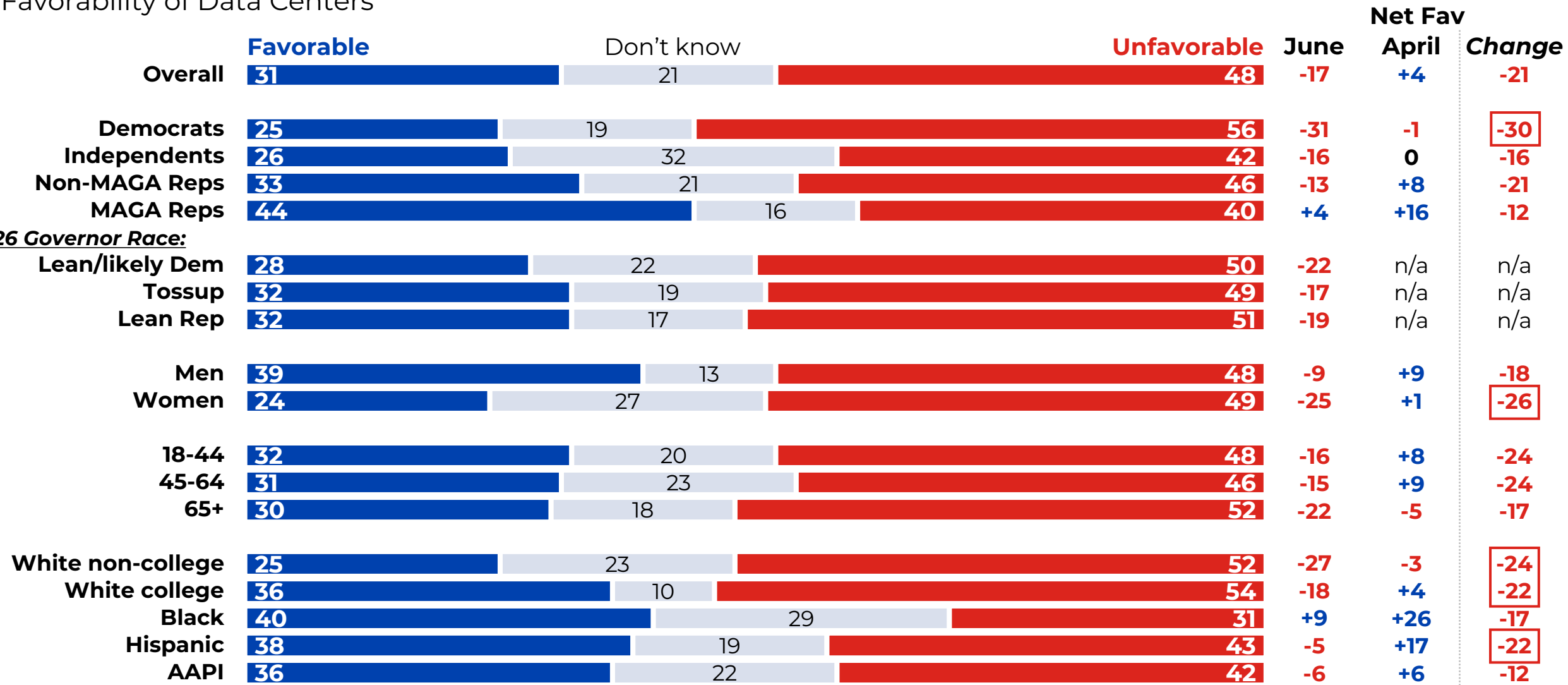
Voters support requiring data centers to fund infrastructure and want the cheapest energy source – clean energy – to keep costs down, which helps overcome cost concerns.

Emphasizing the speed and affordability of clean energy, comparing the investment to other spending, and highlighting safeguards that prevent utilities from passing costs onto ratepayers help overcome concerns about the price tag. As data centers become more unpopular, voters overwhelmingly prefer that technology companies, not families, help finance these investments – and fewer voters believe they will pass costs onto customers than utility companies will.

Landscape

Public opinion on data centers has shifted dramatically, particularly with Democrats, women, white voters, and Hispanic voters

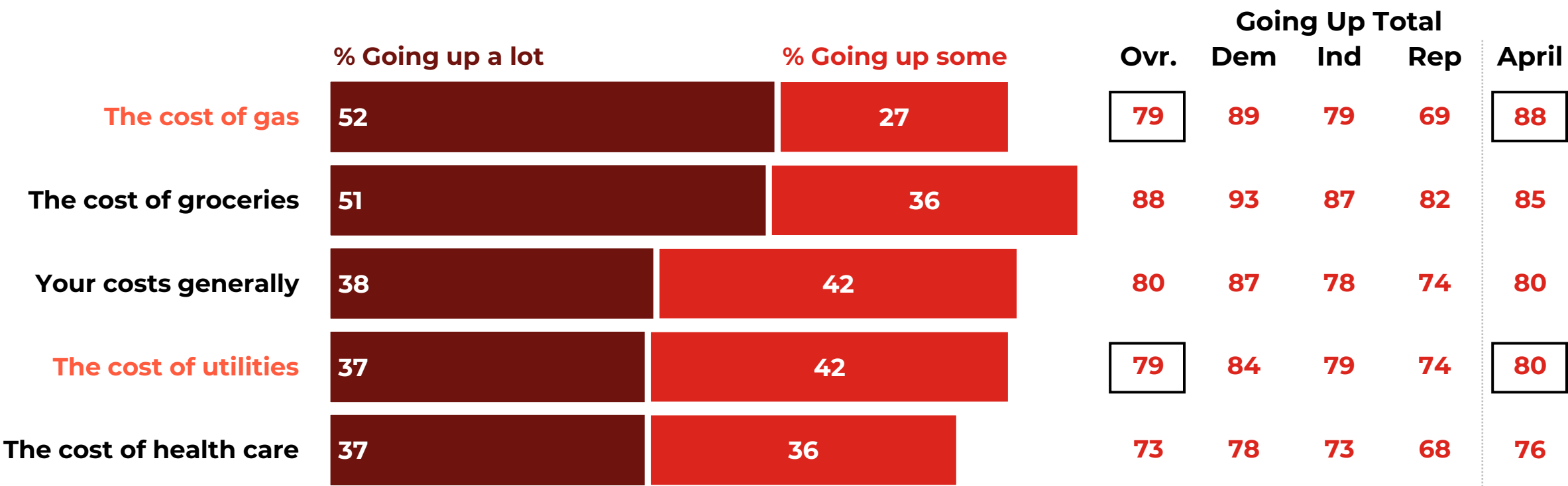
Favorability of Data Centers



Note: References to partisanship throughout are using party self-identification

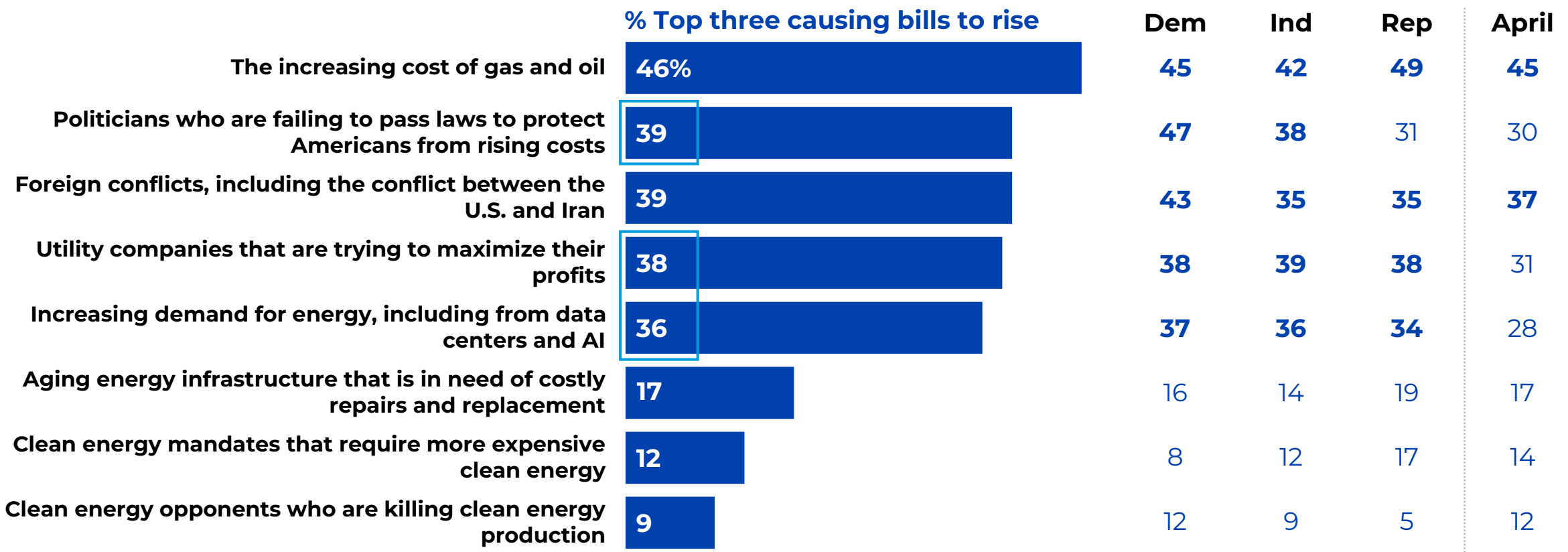
Utility costs remain an acute pain point, while concern about gas prices has eased modestly

Please indicate, for each one, whether you feel like those costs are going up, going down, or staying the same.



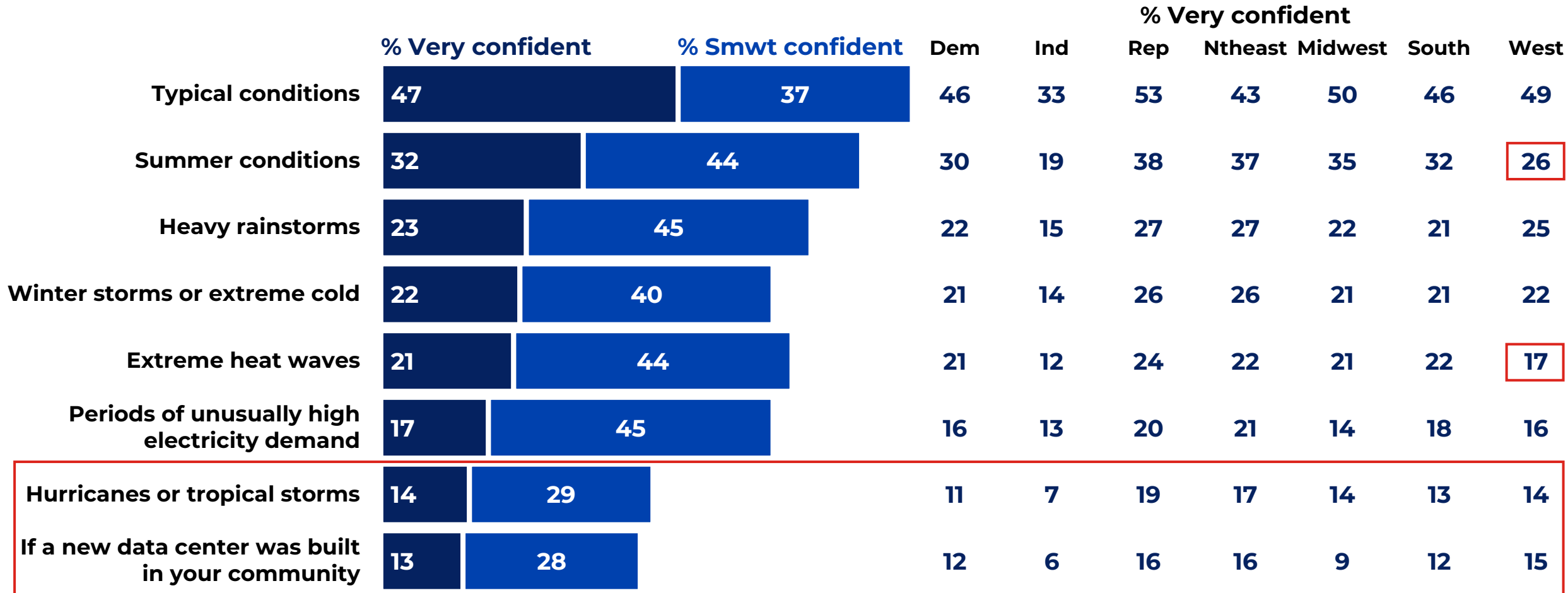
Gas and oil still lead as the top culprit for high utilities, but politicians, utility companies, and data centers are now also at the top

[If said cost of utilities is going up] Who or what would you say is causing utility bills to rise? Select up to three.



Americans have some confidence in electric service normally. Hurricanes and local data center impacts inspire the most doubt

How confident are you that your electric service would remain reliable during each of the following situations?



Voters' greatest concerns on energy are all about costs. Voters are less concerned about reliability and lack of storage for excess energy

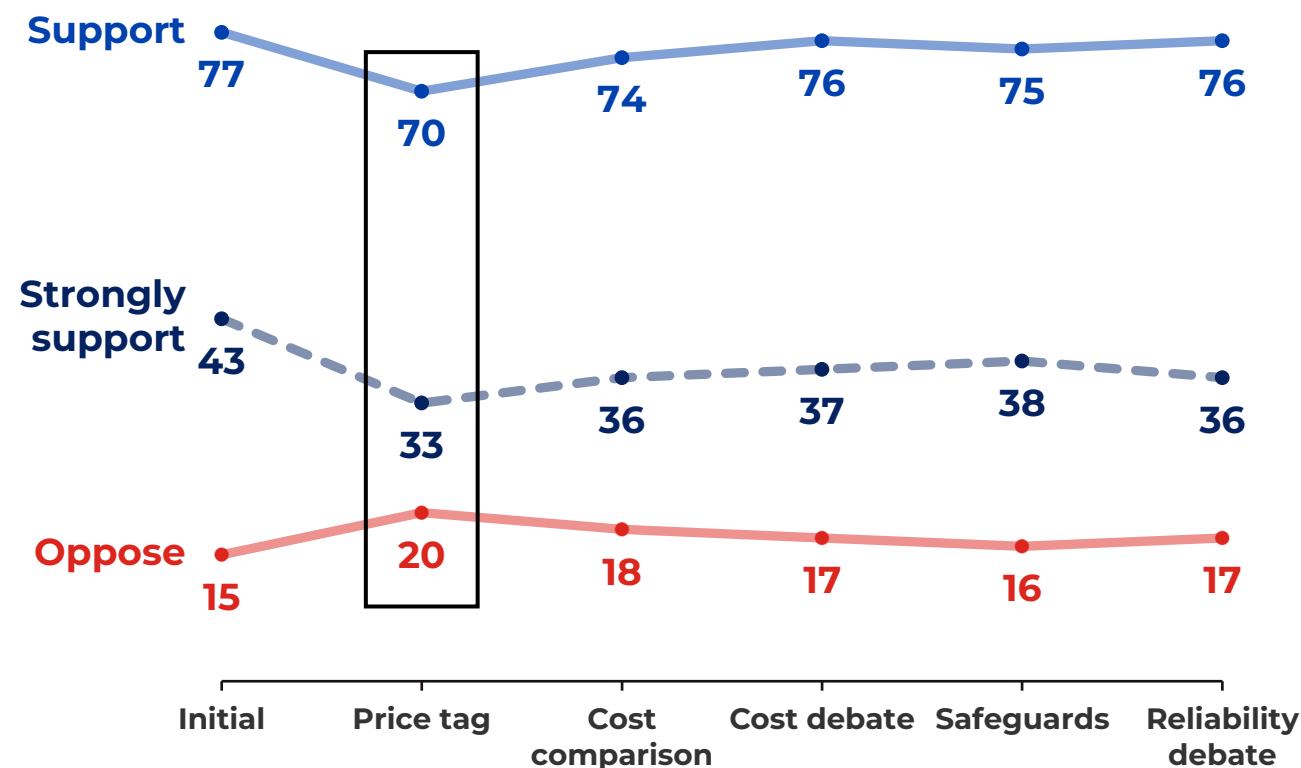
Concerns About the Energy System – 1 to 10 Scale

	% Very concerning (9-10)		% Somewhat concerning (6-8)	% Very concerning (9-10)		
				Dem	Ind	Rep
[DATA CENTER COSTS] When data centers place excessive demand on energy systems, it drives up utility costs for residential ratepayers.	51		33	57	43	49
[GREED] When utility companies and oil and gas companies take higher profits instead of investing in their infrastructure, that means higher costs for consumers.	51		34	58	42	46
[LIMITED SUPPLY] When there isn't enough energy being generated for consumers, limited supply drives up costs for consumers.	48		38	53	41	45
[T LINE INEFFICIENCY] When transmission lines are outdated and in disrepair, electricity can't flow efficiently from where it's generated to where it's needed, leading to higher prices, reduced grid reliability, and higher risk of outages.	43		41	46	36	42
[UNRELIABLE] When energy systems are aging and poorly maintained, it limits the energy grid's ability to adapt to shocks like extreme weather or sudden spikes in demand, making outages more frequent, recovery slower, and service less reliable.	43		41	47	35	42
[BACKUP GENERATION] When the energy grid fails or becomes overloaded, utility companies rely on expensive backup energy generation, raising costs while reducing reliability of electricity service for consumers.	41		42	47	33	39
[LACK OF ENERGY STORAGE] When there are not adequate tools to store energy, excess energy is wasted instead of captured for later use.	36		44	40	34	32

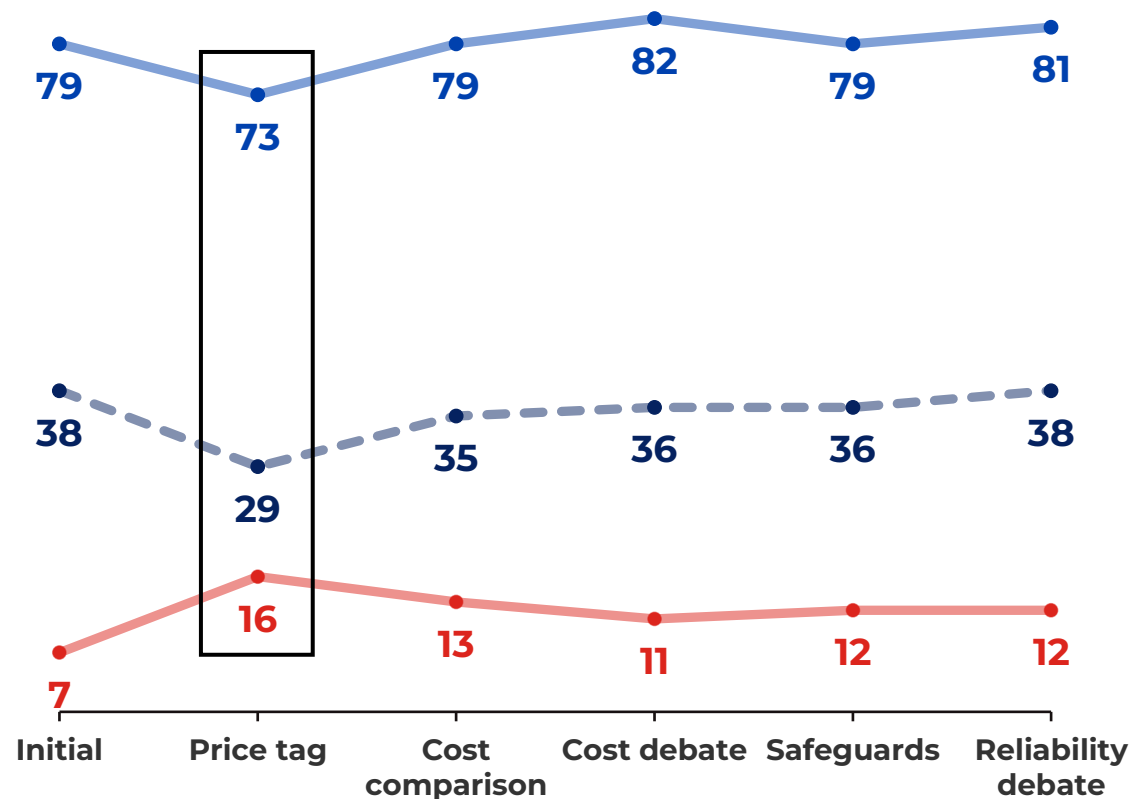
Policy Agenda

Support wanes for both policies with the introduction of a \$50 billion price tag, though remains high and recovers with more information

Support Movement – **Building More Clean Energy, Including Wind and Solar, As Well As Battery Storage**

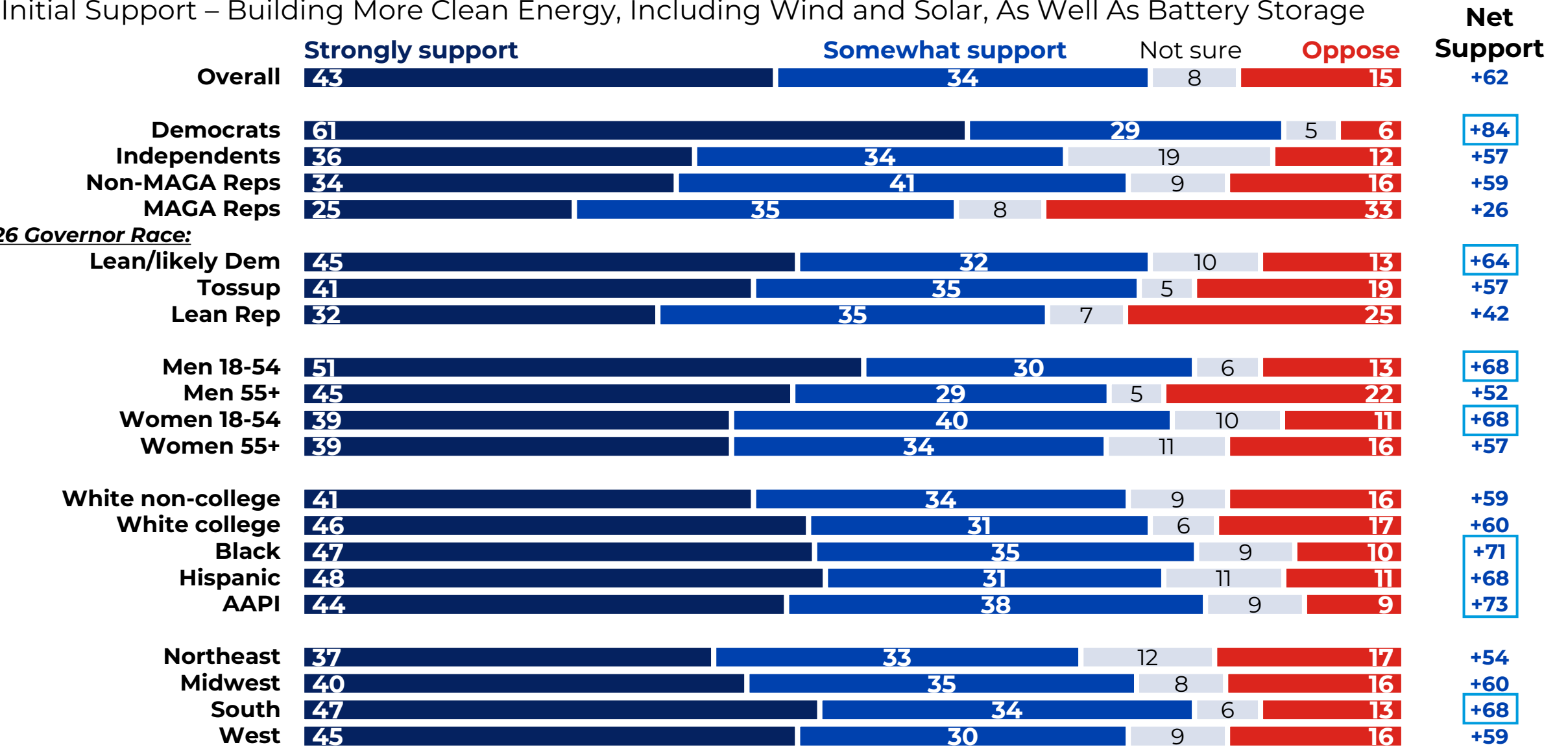


Support Movement – **Building New Transmission Lines and Upgrading Old Transmission Lines that Move and Transfer Energy Around the Country**



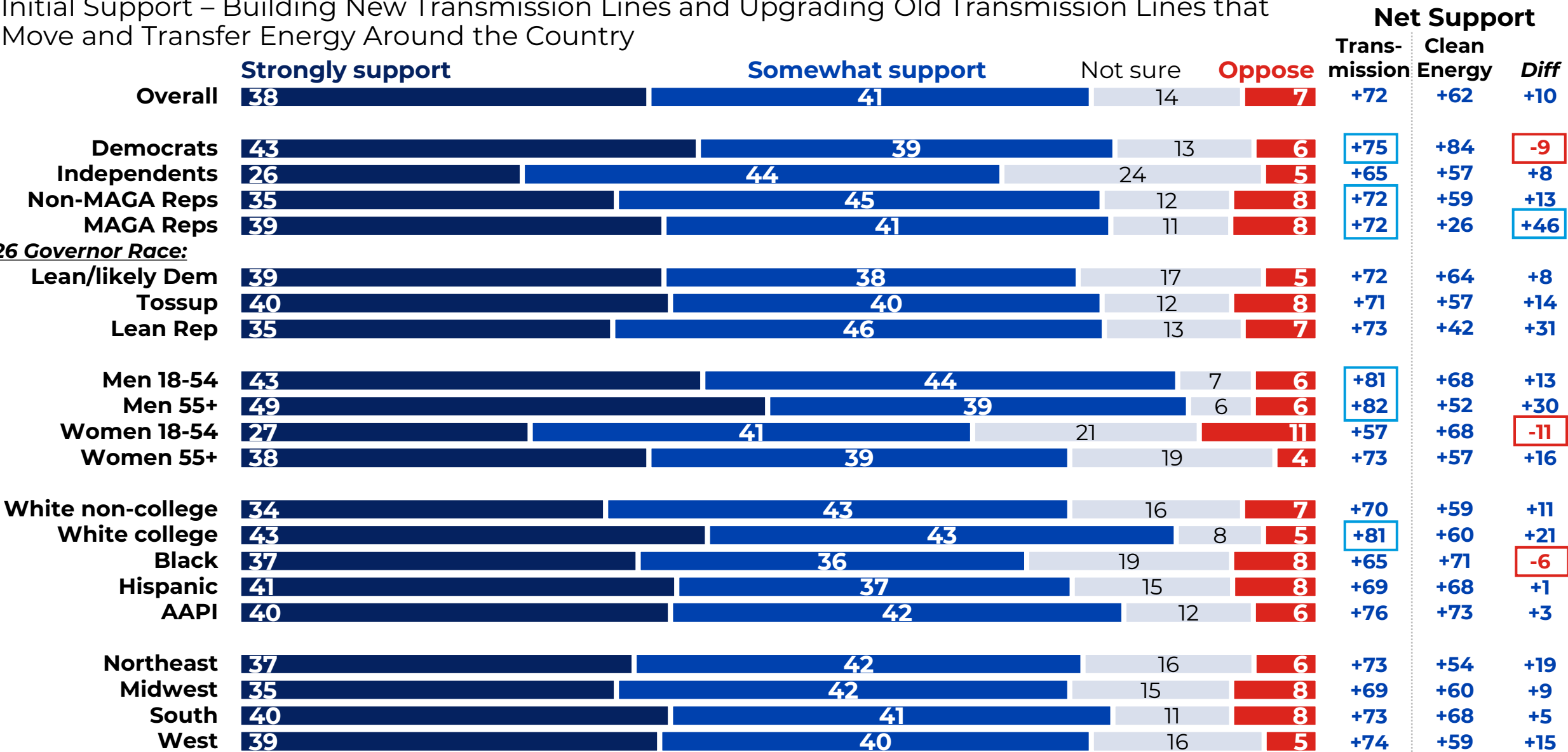
Clean energy is broadly popular, especially with Democratic strongholds and young voters – though MAGA Republicans also support. Voters in the South are the most supportive regionally

Initial Support – Building More Clean Energy, Including Wind and Solar, As Well As Battery Storage



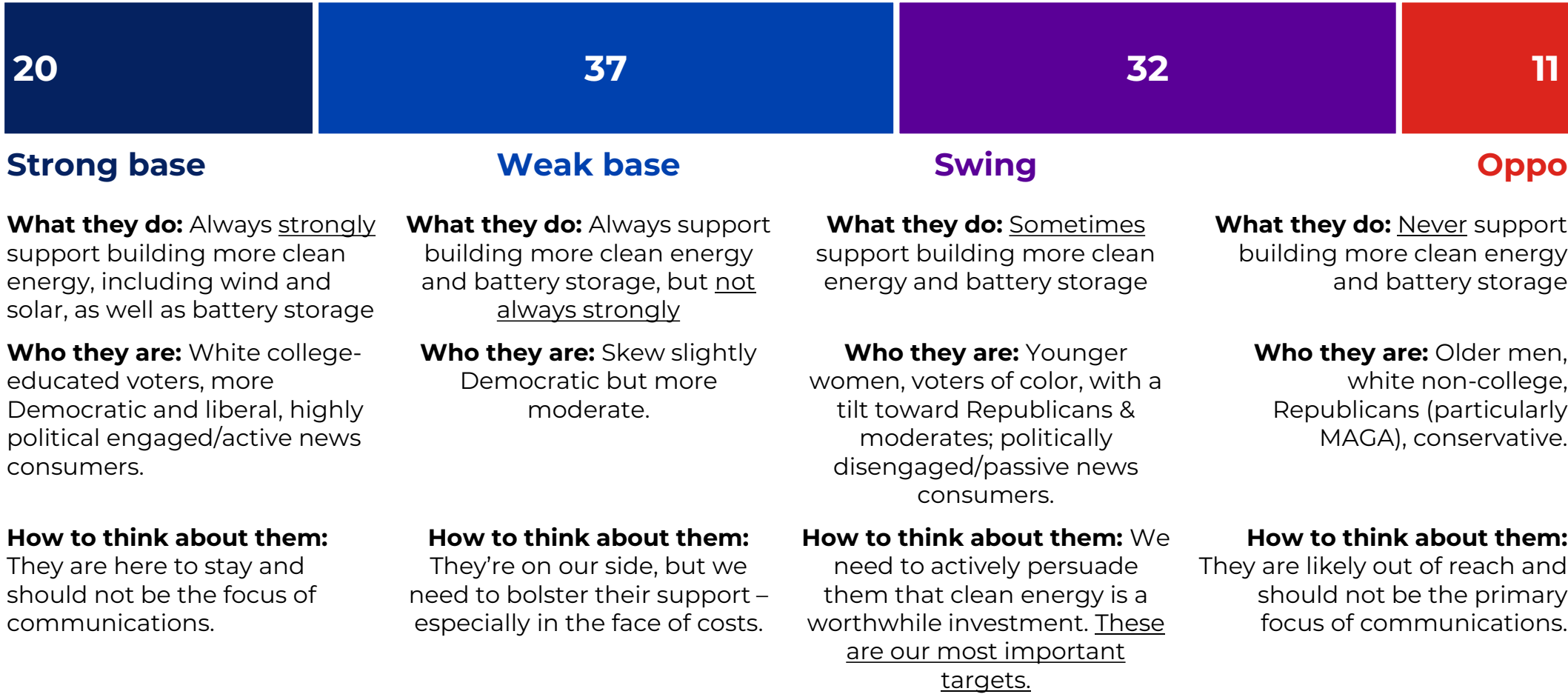
Transmission line investments are massively popular, with strong numbers across party and especially with men and college grads

Initial Support – Building New Transmission Lines and Upgrading Old Transmission Lines that Move and Transfer Energy Around the Country



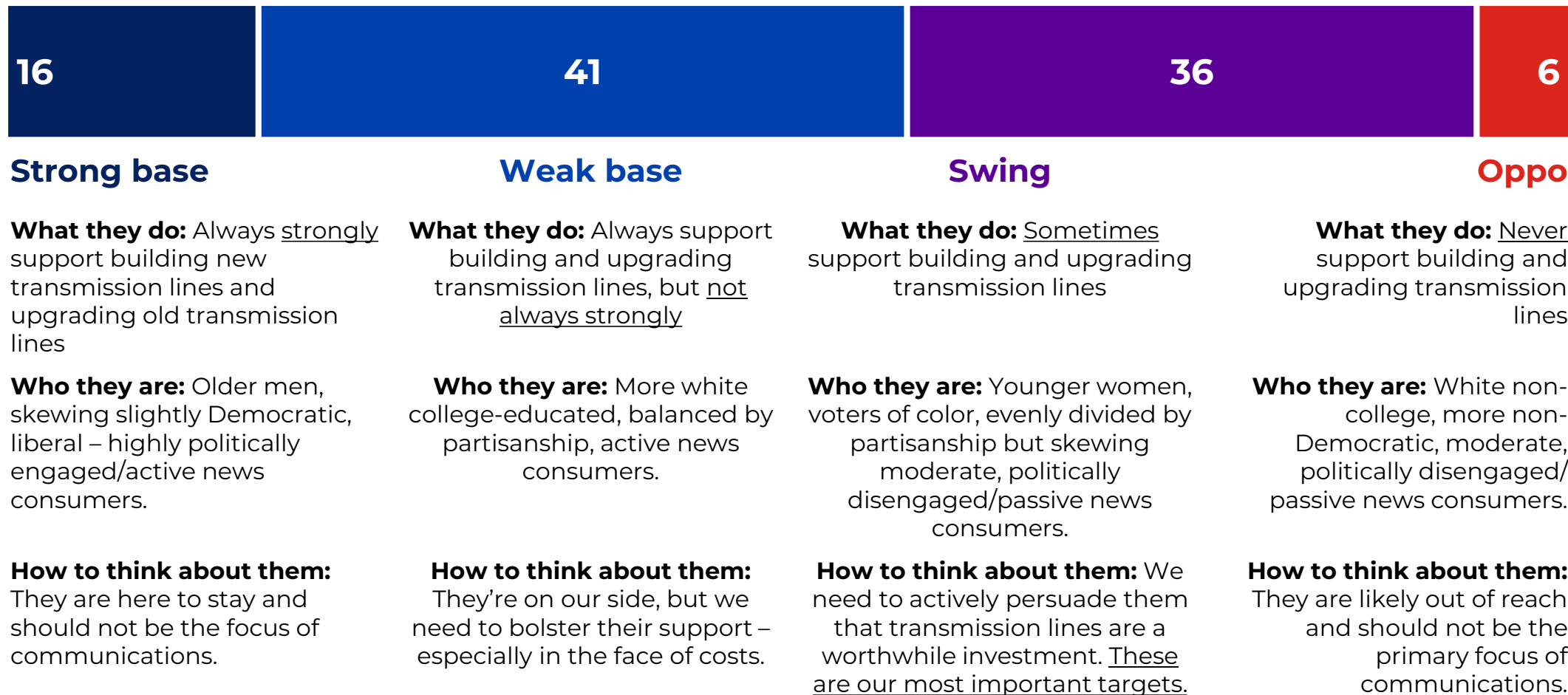
Roughly two in five are clean energy weak base voters who we need to shore up, while another third are truly persuadable on clean energy

Clean Energy Targets



Like clean energy, over half always support building and upgrading transmission lines – but support is less intense. A third are persuadable

Transmission Line Targets



The greatest potential benefits of expanding clean energy are improved air quality and lower prices over time. Biggest concerns are costs, via utility bills or taxes.

Top Three Greatest Benefits of Building More Clean Energy and Battery Storage

	% Top three benefit	CE Weak Base	CE Swing
Improved air quality with less pollution	34%	41	30
Lower electricity prices over time	34	38	35
Reduced impacts of climate change	27	28	23
Less reliance on foreign energy sources due to greater domestic production	25	31	21
More energy supply meeting growing electricity demand	25	29	26
Reduced vulnerability to volatile gas prices, including amid foreign conflicts like the war with Iran	22	26	21
Greater infrastructure investment and job creation	21	24	20
Diversifying our energy sources to improve reliability^ / More competition in energy markets, including with coal and gas^^	Diversify: 26 Competition: 12	22	17
Battery storage making the system more reliable and efficient	16	15	19

^/^^ designates split item

Top Three Concerns About Building More Clean Energy and Battery Storage

	% Top three concern	CE Weak Base	CE Swing
Consumers being charged higher utility bills to pay for it	40%	46	34
Americans having to pay for it through higher taxes	40	46	37
Negative impacts on wildlife, like birds	26	27	23
Clean energy not generating enough energy when there is peak demand	21	22	18
The unreliability of clean energy in different weather conditions	21	22	19
The timeline of these projects getting completed being too long	18	19	15
The government spending money on this instead of other priorities	17	18	19
Loss of open spaces	15	17	16
Negative impacts on property values for homeowners	14	14	15
Negative visual and noise impacts on local communities	11	10	15

For transmission line swing, greatest potential benefits are fewer outages and lower costs – but again, greatest hesitation also comes on costs

Top Two Greatest Benefits of Building and Upgrading Transmission Lines

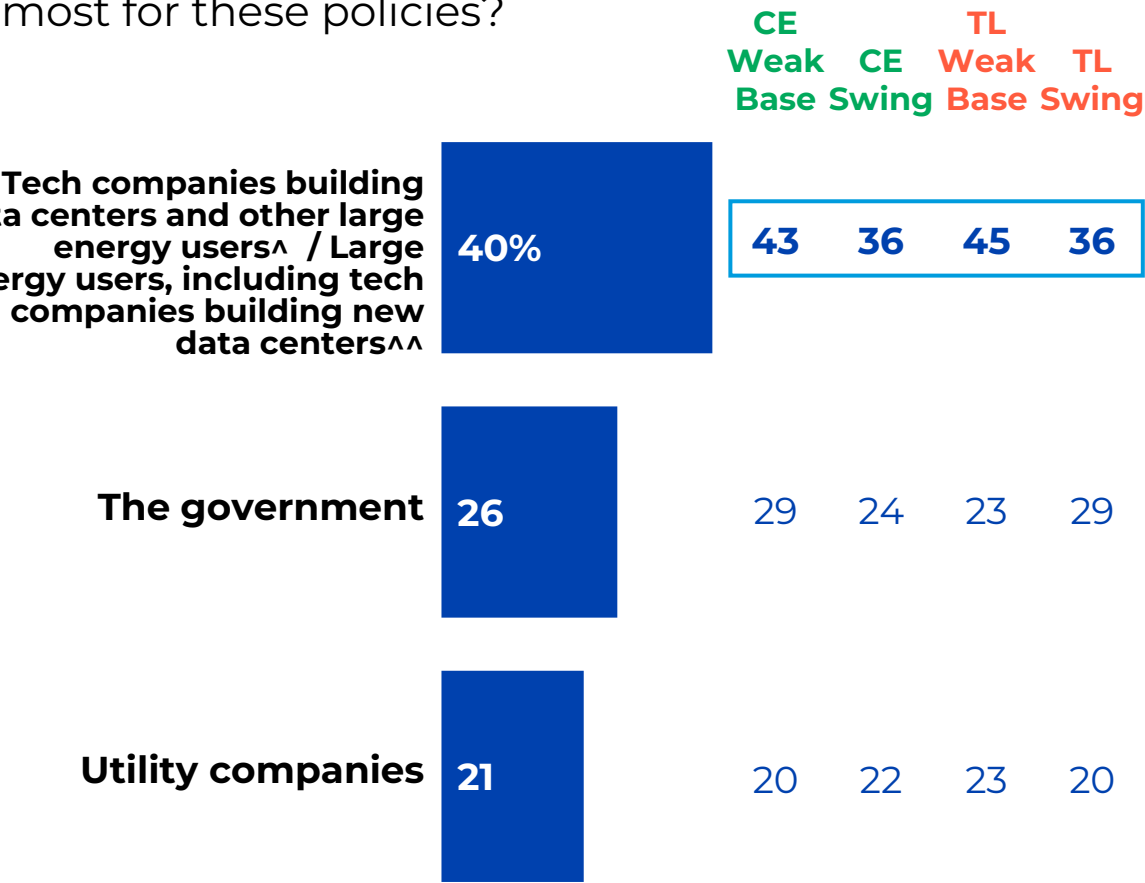
Top Two Concerns About Building and Upgrading Transmission Lines

	% Top two benefit	TL Weak Base	TL Swing		% Top two concern	TL Weak Base	TL Swing
Fewer power outages and more reliable electricity	36%	41	35	Consumers being charged higher utility bills to pay for it	51%	59	40
Improving the grid's ability to withstand extreme weather events	32	38	27	Americans having to pay for it through higher taxes	48	53	47
Better energy infrastructure helping to meet growing electricity demand	31	37	24	The timeline of these projects getting completed being too long	21	24	19
Lower electricity prices over time	28	27	30	The government spending money on this instead of other priorities	19	16	24
More efficient movement of electricity	27	28	27	Negative impacts on property values for homeowners	14	13	16
Greater infrastructure investment and job creation	17	16	18	Negative visual and noise impacts on local communities	10	10	12

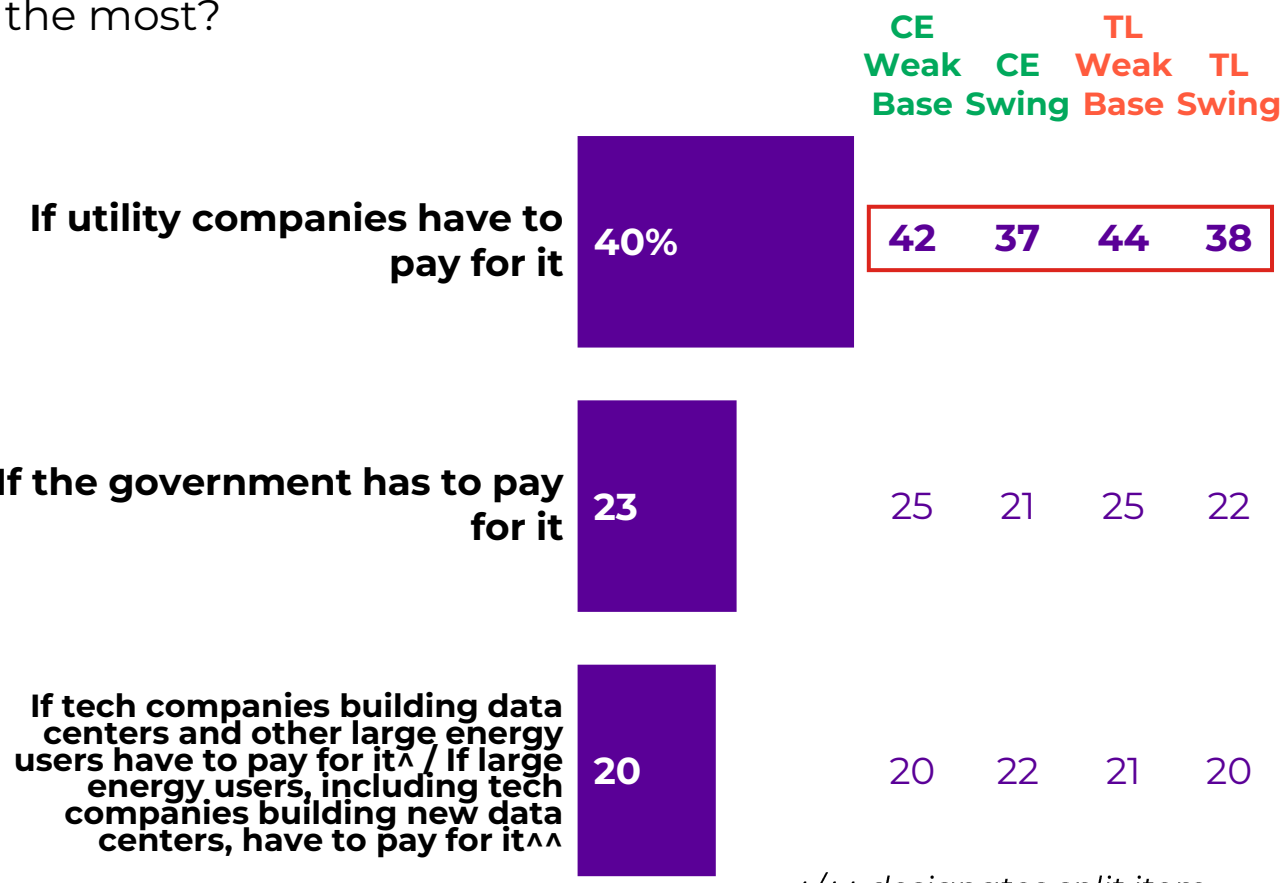
Costs Movement and Messaging

Voters want tech companies to pay for these policies – in part, because they think Americans will pay the most if utility companies foot the bill instead

Who do you think should end up paying the most for these policies?



Which do you think would end up costing you the most?



^/^^ designates split item

Price Tag Information

Let's say that the cost of these energy system investments:

- Building more clean energy like wind and solar with battery storage*
- Building new transmission lines and upgrading old transmission lines that move and transfer energy around the country*

would mean a cost of \$50 billion in total. *With that in mind, please answer the following questions.*

The price tag softens support for both policies – especially with women, non-MAGA Republicans, white non-college voters, and Black voters – though it remains high.

Ground lost on intensity of clean energy support with Dems

Price Tag-Informed Support

	Clean Energy						Transmission Lines					
	Net support			% Strongly support			Net support			% Strongly support		
	Initial	Price Tag	Change	Initial	Price Tag	Change	Initial	Price Tag	Change	Initial	Price Tag	Change
Overall	+62	+50	-12	43	33	-10	+72	+57	-15	38	29	-9
Democrats	+84	+72	-12	61	44	-17	+75	+63	-12	43	33	-10
Independents	+57	+43	-14	36	23	-13	+65	+46	-19	26	18	-8
Non-MAGA Reps	+59	+42	-17	34	27	-7	+72	+51	-21	35	24	-11
MAGA Reps	+26	+16	-10	25	23	-2	+72	+60	-12	39	30	-9
<u>2026 Governor Race:</u>												
Lean/likely Dem	+64	+55	-9	45	32	-13	+72	+59	-13	39	28	-11
Tossup	+57	+45	-12	41	34	-7	+71	+60	-11	40	29	-11
Lean Rep	+42	+27	-15	32	19	-13	+73	+47	-26	35	19	-16
Men 18-54	+68	+61	-7	51	39	-12	+81	+65	-16	43	33	-10
Men 55+	+52	+50	-2	45	37	-8	+82	+72	-10	49	36	-13
Women 18-54	+68	+43	-25	39	28	-11	+57	+42	-15	27	22	-5
Women 55+	+57	+42	-15	39	28	-11	+73	+57	-16	38	26	-12
White non-college	+59	+39	-20	41	30	-11	+70	+54	-16	34	26	-8
White college	+60	+58	-2	46	36	-10	+81	+70	-11	43	32	-11
Black	+71	+52	-19	47	35	-12	+65	+46	-19	37	29	-8
Hispanic	+68	+57	-11	48	34	-14	+69	+54	-15	41	28	-13
AAPI	+73	+64	-9	44	36	-8	+76	+69	-7	40	32	-8

Highlighting higher utility bills and outdated infrastructure is compelling context. Speed and lower costs of clean remain important data points

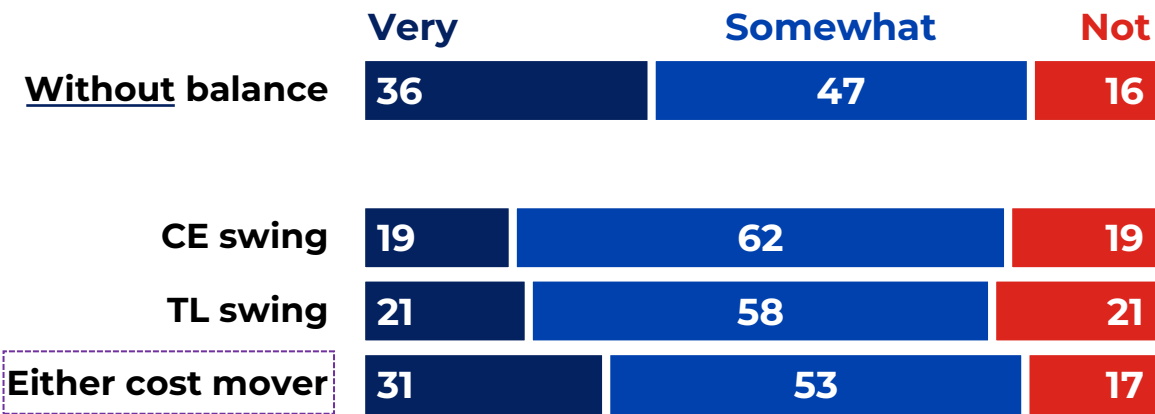
Highlighter Exercise – Pro-Agenda, Costs

Right now, **Americans** are seeing **higher utility bills,** and a big reason is that our **energy system** just **hasn't kept up.**

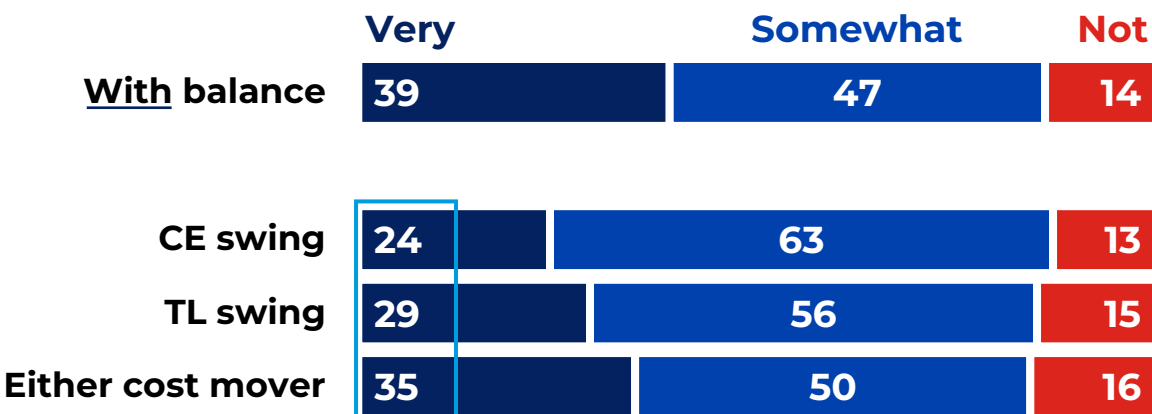
Demand is **rising** fast, including from data centers, but our **infrastructure is outdated.** We need to bring more energy online as **quickly** and **cheaply** as possible. With **wind** and **solar power projects taking less than a year to build** while new gas power plants take up to seven years to build and cost up to **60% more** to produce the same amount of electricity, powering this with **clean energy** is the **smarter, cheaper, faster** move. At the same time, we should still use existing gas to get by and keep costs down, knowing that these investments in wind and solar will get us to a cheaper, clean energy future in the coming years. We also need **better transmission systems** to actually use and distribute that energy effectively and efficiently, and battery storage to store it when it is abundant and deploy it when it is needed. If we invest now, we can **bring costs down over time** and avoid paying for an inefficient system, while **creating new good-paying jobs.**

Balanced language shown to split sample: “At the same time, we should still use existing gas to get by and keep costs down, knowing that these investments in wind and solar will get us to a cheaper, clean energy future in the coming years.”

How convincing do you find this statement?



“Either cost movers” become less supportive of either clean energy or transmission line investments after reading the \$50 billion price tag, or become less supportive of both.



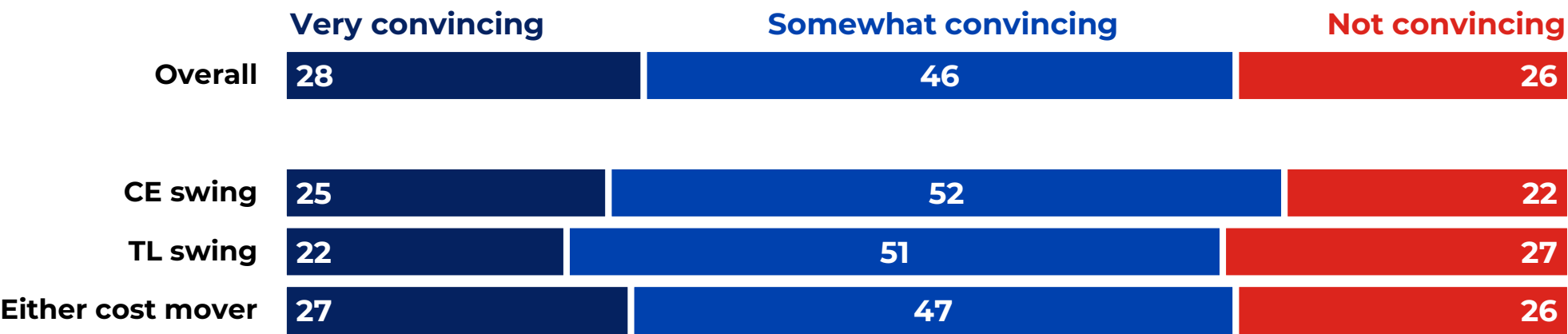
At a topline level, there isn't much of a difference between conceding short-term oil and gas or not. But those persuadable on both clean energy and transmission lines see slightly more appeal there.

A fossil fuel costs argument is less convincing than a clean energy one. But, language acknowledging the system needs improvement and that the “American people shouldn’t foot the bill” is effective and should be integrated into a clean energy argument

Highlighter Exercise – Anti-Agenda, Costs

We all agree the **electricity system needs improvement,** but these clean energy investments and mandates come with a real price tag. And at the end of the day, that **cost** gets **passed** on to **consumers.** Green energy just isn’t as simple as it’s sometimes made out to be: you also need backup power, storage, and major transmission upgrades. It **shouldn’t be on the American people to foot the bill** for radical **environmentalists’** wish lists to mandate all clean energy. Instead of rushing into expensive changes, we should take an **approach** that **keeps energy** **affordable** with **natural gas** and **clean, beautiful coal** while still improving the system over time.

How convincing do you find this statement?



Corporate accountability for tech and utility companies to ensure ratepayers don't bear the costs is the most convincing message

Convincing Reasons to Support Policies

	CE		TL		Either
	Weak	CE	Weak	TL	Cost
Ovr.	Base	Swing	Base	Swing	Mover
		% 9-10 convincing			

37	39	24	41	25	32
----	----	----	----	----	----

32	34	18	35	22	29
----	----	----	----	----	----

32	36	15	36	20	27
----	----	----	----	----	----

32	35	17	35	21	28
----	----	----	----	----	----

31	32	18	35	21	26
----	----	----	----	----	----

31	33	16	33	21	25
----	----	----	----	----	----

[CORPORATE ACCOUNTABILITY] America needs these energy grid upgrades and expanded clean energy, but families should not have to bear the costs. Utility companies, data centers, and tech companies that benefit from increased energy use should be required to invest in the infrastructure needed to support that growth, protecting consumers from higher utility bills and ensuring corporations pay their fair share.

[LONG-TERM] Investing in clean energy, battery storage, and transmission lines can help protect families from future spikes in electricity costs. This means utility companies and large energy users like data centers would help pay for these investments up front, reducing the burden on consumers now and helping keep costs stable over the long term by creating more energy generation with cheaper, cleaner energy and better means of transporting that energy.

[RELIABILITY] Building more clean energy is important, and improving and modernizing the electric grid is equally critical. **Upgrading transmission lines and strengthening energy infrastructure can make the electric system more reliable, reduce outages, and better protect communities** from increasingly severe storms, extreme weather, and other disruptions, while clean energy is a reliable, effective energy source.

[VOLATILITY] Building more American-made clean energy, battery storage, and transmission infrastructure can make the United States less dependent on global energy markets that are vulnerable to foreign conflicts, which drive up energy costs. Expanding domestic energy production and improving the electric grid helps protect families from price spikes caused by instability overseas, like the war with Iran.

[CLEAN ENERGY] Building more clean energy, battery storage, and transmission lines can reduce pollution, improve air quality, and help address climate change while meeting growing energy demand. Expanding clean energy allows the country to produce more electricity without increasing harmful emissions, while upgrading and building new transmission lines makes the system more efficient.

[COSTS] Building more clean energy, battery storage, and transmission lines is one of the most effective ways to lower electricity costs over time. New clean energy projects are significantly cheaper to build than new gas power plants (which can cost up to 60% more than new clean energy), and increasing energy supply helps lower utility bills for families. Plus, upgraded transmission lines mean less waste and more efficiency in transferring energy.

Comparing the cost of this energy investment to the White House ballroom/frivolous spending especially, as well as the war with Iran, is most convincing

Convincing Reasons to Support Spending \$50 Billion on These Energy Investments

Ovr.	CE Weak Base	CE Swing	TL Weak Base	TL Swing	Either Cost Mover*	Dem	Ind	Rep	
% 9-10 convincing									
41	46	26	46	30	35	54	33	31	The government is spending billions of dollars on things like a new White House ballroom; we can spend \$50 billion on something like this that will actually benefit American families.
35	39	22	40	23	32	47	28	26	This investment is far less than the U.S. spends on other things: for example, the war with Iran has already cost U.S. households \$100 billion, and the government requested another \$200 billion in additional war funding.
34	36	20	36	22	28	43	20	29	This investment would save households a projected \$14 billion per year in lower utility bill costs and will be worth the cost of the investment.
27	28	14	28	16	22	35	15	23	This investment would pay off in ratepayer savings in just 3-4 years and will quickly be worth the cost of the investment.

**"Either cost movers" become less supportive of either clean energy or transmission line investments after reading the price tag, or become less supportive of both.*

Reliability Debate

Among persuadable voters, there are signs that conceding short-term oil and gas can be modestly helpful; importantly, it also doesn't backfire with base

Which statement do you agree with more?

Clean energy is more reliable and faster than other sources: **new wind and solar projects take less than a year to build, significantly faster than building new gas plants**; and in that time, we can bring enough clean energy online to meet rising demand that is supplemented with increased battery storage

Green energy is not reliable and can't replace coal and gas: **they are reliable, tried and true, and affordable, and we should stick with what we know works**

		DK		Overall	Net Reliable Clean Energy Targets				Either Cost Mover
					Strong Base	Weak Base	Swing	Oppo	
62	New wind and solar only	12	25	+37	+92	+61	+11	-71	+33
66	Balanced approach	9	25	+41	+91	+65	+20	-62	+37

Clean energy is reliable: new wind and solar projects take less than a year to build, and countless new power plants can be built in short order. **At the same time, we can use the existing gas we have until clean energy is fully online and sufficient to power our economy**

Explaining the value of battery storage can also be helpful in the debate over clean energy reliability

Which statement do you agree with more?

Clean energy is reliable: **battery storage makes it so that wind and solar can generate energy when wind and sun are abundant**, then store that electricity in batteries to be deployed when energy is needed later

DK

Green energy is not reliable: **wind and solar don't produce energy all the time, which is a real challenge** when demand is high or during extreme weather

Overall



Clean energy targets:

Strong base



Weak base



Swing



Oppo



Conclusions and Recommendations

Our Message

Context

*For too long, politicians have let utility companies and Big Tech put their profits ahead of working families. Families are paying higher electricity bills because we're relying on outdated energy infrastructure **(ALT: utility services or electric grid)**, while massive new data centers are putting even more strain on the grid. Families shouldn't be the ones footing the bill.*

Populist Angle

The companies driving demand, not working families, should help pay for these investments. The technology companies building massive data centers should pay their fair share, with strong protections to ensure they can't pass those costs on to consumers. It's time to build an energy system that works for families: not just corporate executives.

Solution

*It's time to modernize our energy infrastructure **(ALT: utility services or electric grid)** by upgrading the electric grid, building more affordable clean energy, adding battery storage, and expanding the transmission lines that deliver electricity to homes and businesses. **(OPTIONAL: Include other policies that tested well on the grid.)***

Cost Stats

Wind and solar are already among the cheapest and fastest ways to generate new electricity, taking less than a year to build while new gas power plants take up to 7 years and cost up to 60% more. The government is spending billions of dollars on things like a new White House ballroom; we should spend the money on something like this that will actually benefit American families by bringing down utility costs.

Reliability Prebutter

*At the same time, battery storage saves that energy generated when the sun is shining or the wind is blowing so it's there when we need it most. Together, these investments create jobs, strengthen reliability, and lower energy costs over time. **(OPTIONAL, AUDIENCE DEPENDENT: And in the meantime, we can still use existing oil and gas to get by and keep costs down, knowing that these investments will get us to a cheaper, clean energy future.)***

GSG FOR CLIMATE POWER, JULY 2026

Thank You

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Appendix

As a reminder from the discussion board...

1. Cost is the lens through which voters view every energy issue
2. Voters see the grid as outdated and in need of modernization, but only if the investment is practical/worth the cost.
3. The biggest barrier to support is fear that consumers will ultimately foot the bill.
4. Voters support expanding clean energy, but not abandoning fossil fuels overnight.
5. Data centers are increasingly seen as straining the energy system.
6. Reliability matters, but cost matters more – and clean energy's reliability remains a vulnerability.
7. Extreme weather and outages make grid unreliability tangible for communities where these are more pressing/frequent.
8. EV infrastructure is politically weaker than grid modernization and can drag broader investments down.
9. Energy investments struggle to compete with healthcare and the economy as spending priorities, but voters will support them if they lower utility bills.
10. Long-term solutions outperform short-term fixes that could raise costs later.
11. "Energy systems" and "power systems" resonate more than the broader term "infrastructure."

Conclusions and Recommendations

Everything has to come back to costs. Cost is not simply another issue: it is the lens through which voters evaluate every energy policy, every investment, and every tradeoff. Every argument should ultimately answer one question: “How does this affect my utility bill?” While these policies are broadly popular, stoking voters’ fear of high costs reduces support. Every pro-agenda message should reinforce that these investments are reasonable relative to other government priorities, lower costs over time, protect families from future price spikes, and prevent utilities or other powerful interests from passing costs onto consumers.

We should be leaning into accountability for data centers and utilities: most of all, preventing them from passing through costs of investment to consumers. Growing animosity toward data centers creates one of the clearest openings for this agenda. Voters consistently believe the technology companies driving electricity demand should help pay for the infrastructure needed to support it – and are far more willing to believe those costs can be absorbed by tech companies than by utilities, which voters assume will simply pass them on to ratepayers. Policies requiring data centers to pay their fair share also feel more realistic than policies like freezing utility rates or limiting utility company profits, because of this skepticism about utility companies actually being held accountable.

Our proactive message and strongest response to cost attacks should follow a consistent framework:

- Acknowledge that the energy system is outdated and needs modernization, including both new energy generation and upgraded transmission.
- Highlight that families will NOT be footing the bill, and that that responsibility lies with increasingly unpopular data centers and the companies behind them.
- Explain that wind and solar are among the cheapest and fastest sources of new electricity to meet rising demand – with statistics we know are convincing.
- Put the investment price tag in perspective by comparing it to other major federal expenditures that do little to directly benefit families.
- Reinforce consumer protections, including preventing utilities from passing costs onto customers and providing refunds or credits if promised savings fail to materialize.
- Emphasize the payoff: lower utility bills over time, a more reliable energy system, and stronger protection against future price spikes.

Conclusions and Recommendations

Frame these investments as permanent fixes, not temporary patches. As we heard in the discussion board, voters are skeptical of policies that temporarily lower costs only to potentially create larger cost burdens later – like freezing rates or expanding LIHEAP. Investments that modernize the energy system and reduce future price increases feel more responsible and credible than short-term subsidies or temporary rate freezes. That framing should extend beyond clean energy and transmission to the broader policy agenda.

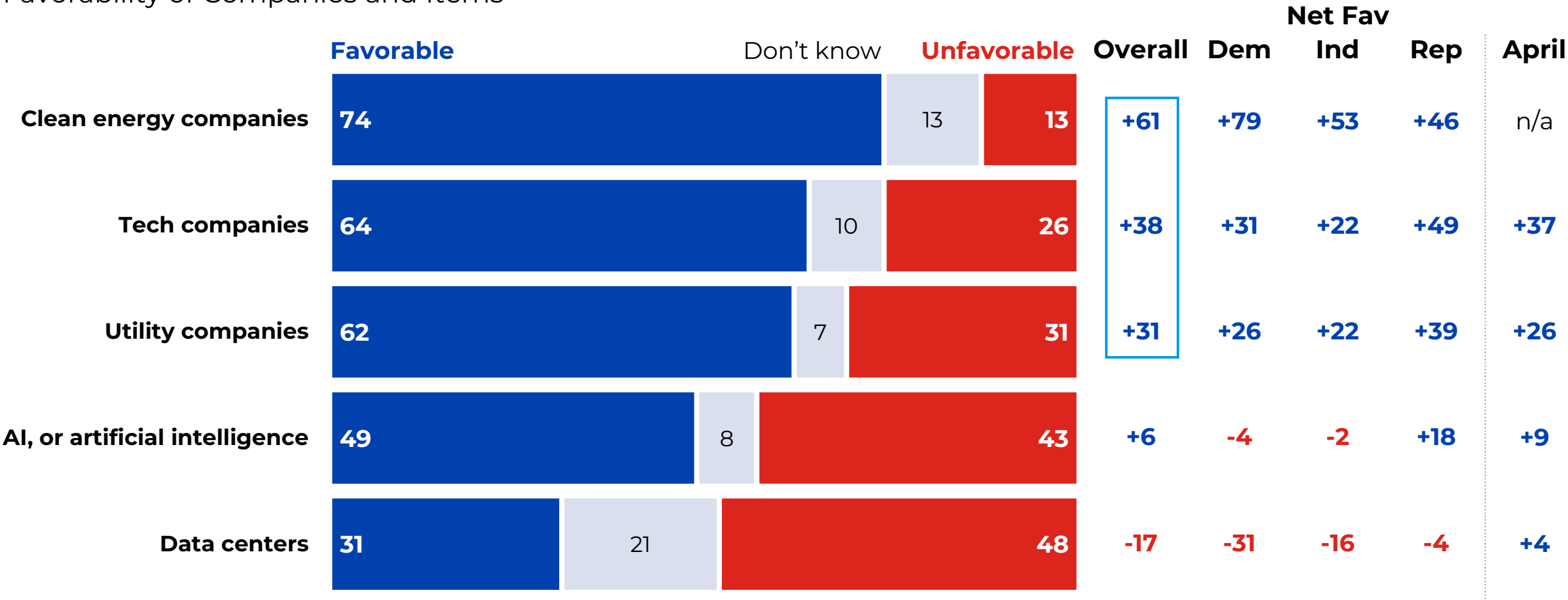
A “balanced approach” that includes temporary oil and gas use reassures persuadable voters but isn’t a silver bullet to cost or reliability concerns. Acknowledging that existing oil and gas will continue to play an interim role as clean energy gets built modestly increases confidence among swing audiences, without alienating clean energy-loyal Democratic base voters. But, it doesn’t overwhelmingly win over persuadable voters, either. It should be used as reassurance, not as the centerpiece of the message.

Reliability arguments require education. Voters' concern isn't battery storage itself: they simply believe wind and solar don't produce electricity all the time – when it isn’t sunny or windy. Explaining how battery storage captures excess energy and delivers it when demand is high is compelling. The challenge is helping voters understand the technology rather than persuading them to like it: future research should further interrogate this question.

Lead with "utility services," "energy infrastructure," or "the electric grid" rather than "infrastructure." Voters understand and respond to concrete descriptions of the energy system, while "infrastructure" is too broad and fails to anchor the conversation, like we heard in the discussion board.

Clean energy companies, tech companies, and utility companies viewed positively in abstract, as in April

Favorability of Companies and Items



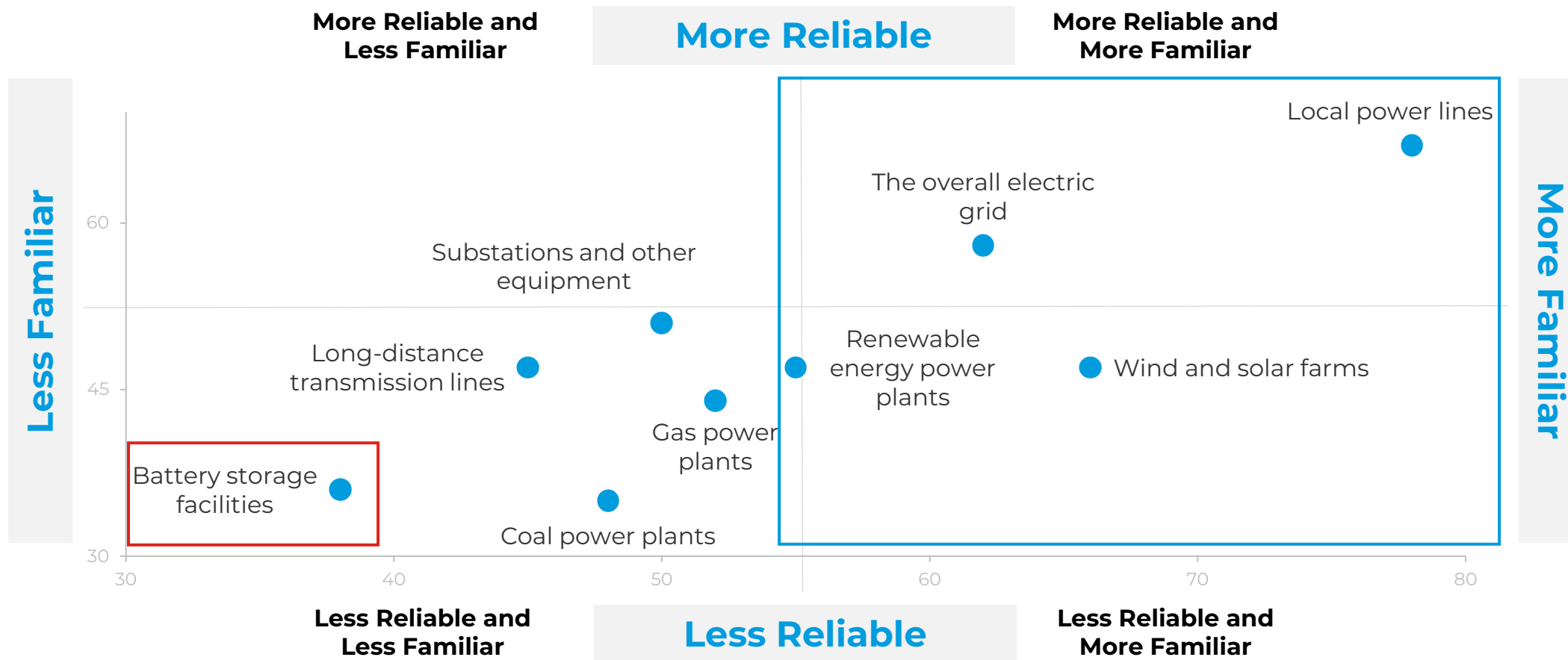
Voters continue to look to state and federal government on utilities and issues related to energy. AI, gas prices, and corporate accountability are more federal issues

Please indicate who you personally trust more to handle each issue.

	Federal gov't	The [STATE] state gov't	Your local gov't	DK	Don't trust any	Overall	Total State + Local		
							Dem	Ind	Rep
The cost of utilities	15	36	13	9	28	49	50	37	52
Holding utility companies accountable to ratepayers	18	34	11	9	28	45	49	37	44
Upgrading the electric grid	20	34	9	13	24	43	48	31	42
Improving the power system	21	31	10	11	27	41	46	30	39
Putting middle-class families first	23	24	10	9	33	34	37	29	33
Your costs generally	25	21	12	8	35	32	32	33	32
Data centers	21	20	10	15	33	31	35	18	30
Making sure corporations are held accountable to consumers	33	19	8	8	31	27	28	24	27
Making sure corporations pay their fair share	34	16	7	9	34	24	27	19	22
The cost of gas	35	15	8	7	34	23	24	26	22
AI	27	11	7	15	40	19	18	17	20

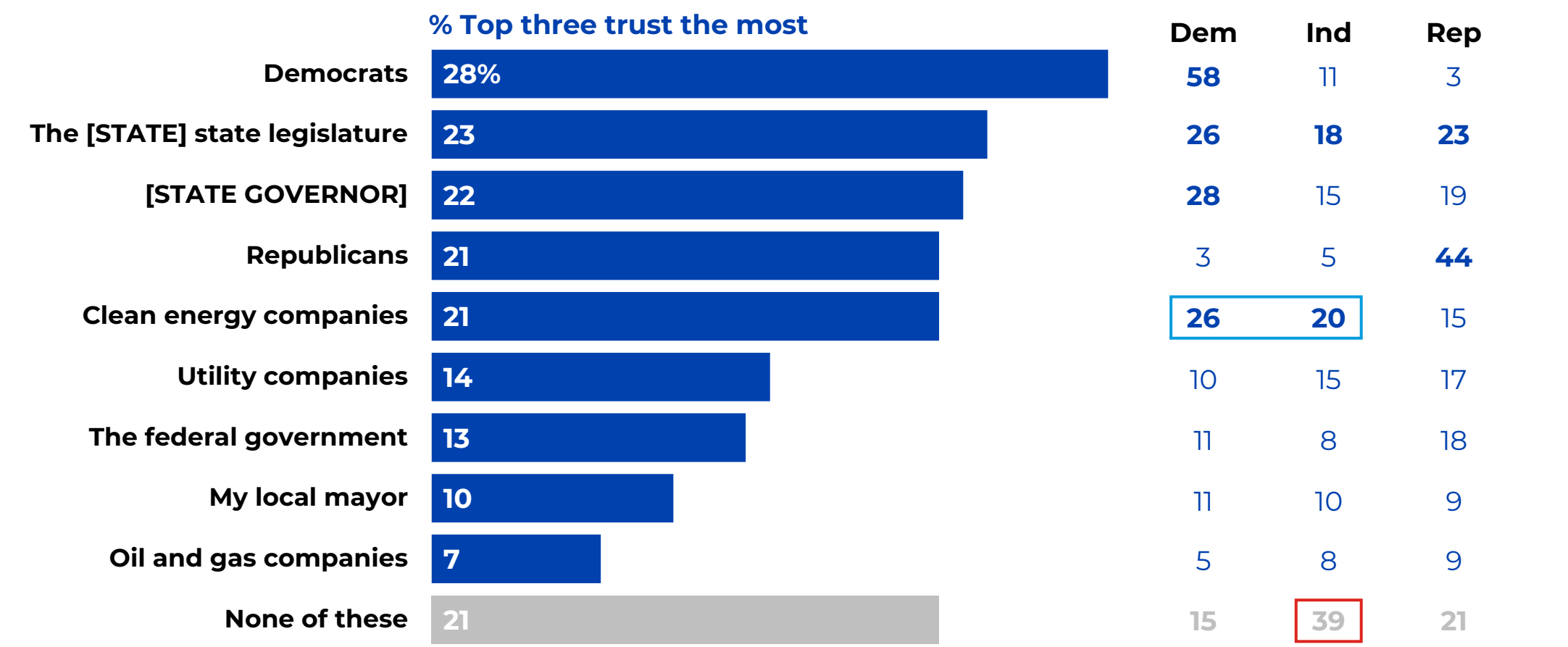
As in the qualitative research, local power lines are best-known and seen as most reliable part of grid. Clean energy sources are more familiar and reliable than coal or gas. Battery storage needs education to be impactful

Familiarity v. Reliability of Parts of the Electric System



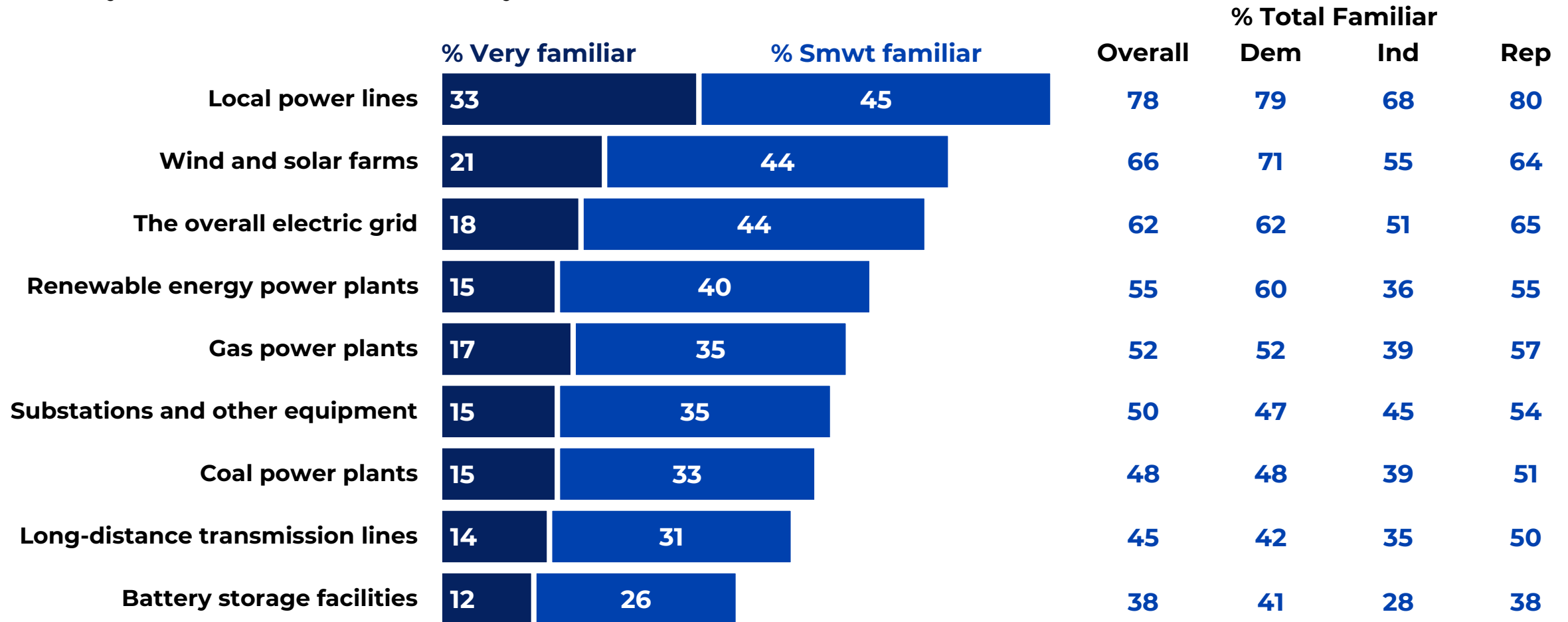
A plurality of independents trust nobody to look out for them on energy issues; some trust for Democrats, state legislatures, governors

Who do you trust the most to look out for people like you when it comes to these issues? Select up to three.



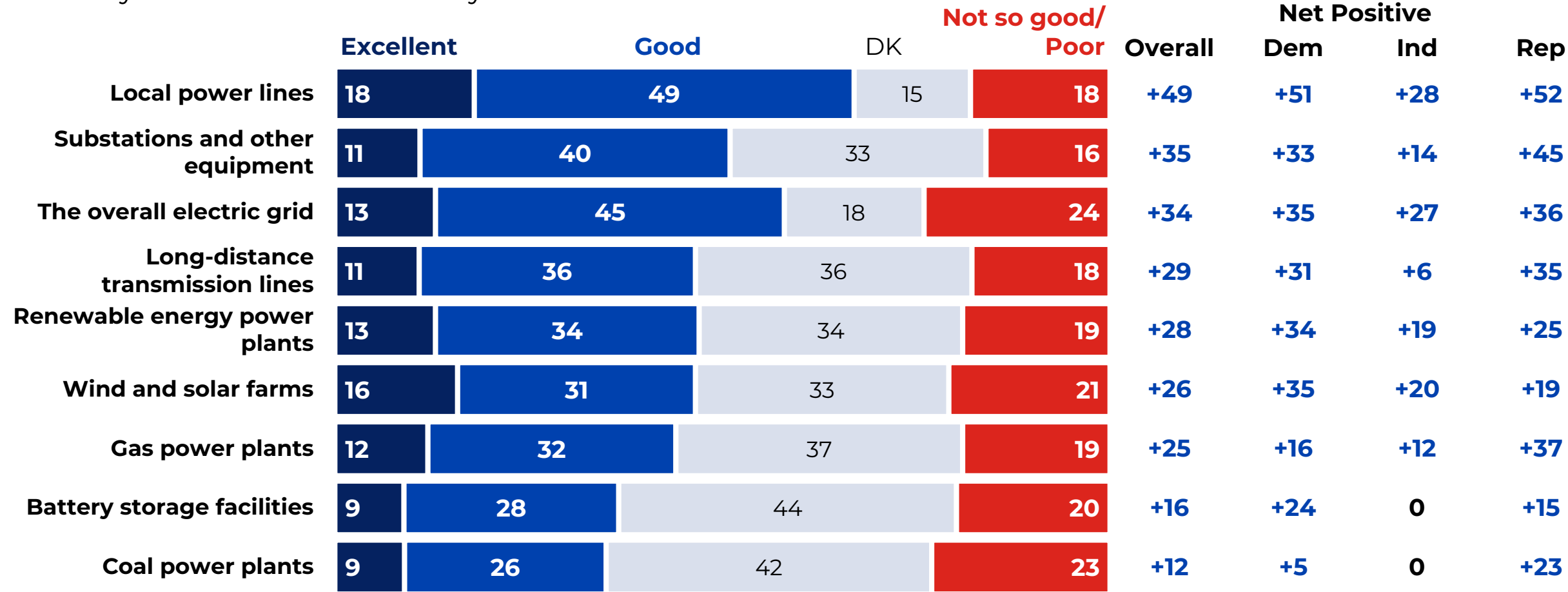
As in our qualitative research, familiarity is highest in the electrical system on local power lines. Battery storage is virtually unknown

Familiarity with Parts of the Electric System



Feelings about grid reliability are lukewarm, with lower ratings/greater uncertainty on coal, battery storage. Feelings are positive on local power lines

Reliability of Parts of the Electric System



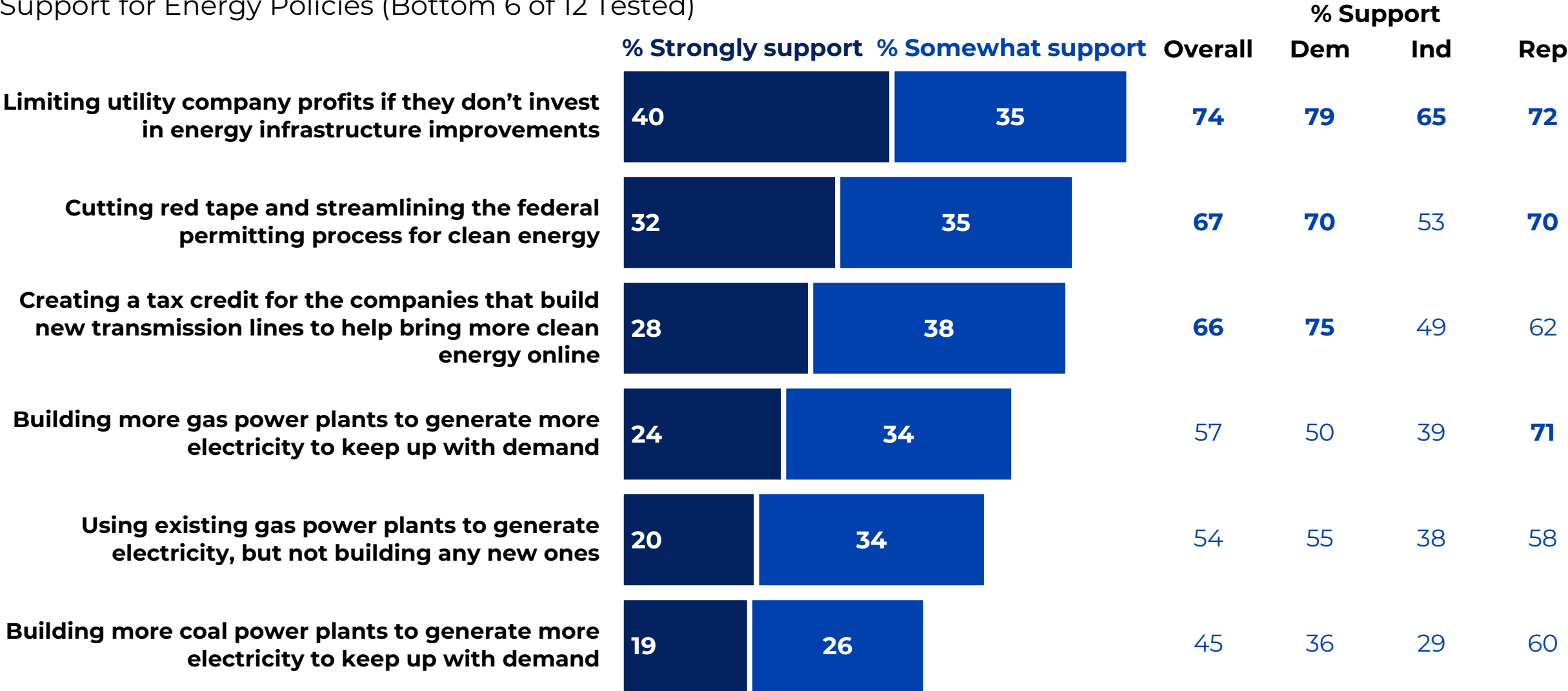
Policies checking data centers, ratepayer bill of rights, improving grid resilience among most popular

Support for Energy Policies (Top 6 of 12 Tested)

	% Support		Overall	Dem	Ind	Rep
	% Strongly support	% Somewhat support				
Forcing data centers to build or pay for any new energy systems they require, so that they don't put strain on the energy supply in communities where they are building or raise utility costs for consumers	53	26	79	80	70	81
Creating a "ratepayer bill of rights" that would protect people from massive rate hikes, prevent people from having their power shut off during surges, and provide more oversight and accountability for utility companies	49	28	77	83	63	76
Improving grid resilience against outages caused by things like natural disasters or cyberattacks	47	35	82	85	68	84
Upgrading and modernizing the electric grid to handle higher demand and prevent outages	45	37	83	85	69	84
Freezing utility rates to stop rising electric bills until large amounts of clean energy are deployed, the grid is modernized, and increased electricity brings costs down on their own	41	32	72	78	62	70
Expanding eligibility for the Low Income Home Energy Assistance Program to provide more working families the same opportunity to get direct aid on utility bills	40	33	74	83	66	67

Republicans drive support for gas and coal

Support for Energy Policies (Bottom 6 of 12 Tested)



Grid fixes, tax credits for companies, oil and gas seen as most likely policy outcomes

Perceived Likelihood of Energy Policies (Top 6 of 12 Tested)

	% Likely		Overall	Dem	Ind	Rep
	% Very likely	% Somewhat likely				
Upgrading and modernizing the electric grid to handle higher demand and prevent outages	16	43	59	60	50	62
Improving grid resilience against outages caused by things like natural disasters or cyberattacks	15	42	57	55	46	62
Creating a tax credit for the companies that build new transmission lines to help bring more clean energy online	13	42	55	55	46	58
Building more gas power plants to generate more electricity to keep up with demand	13	39	51	54	39	52
Using existing gas power plants to generate electricity, but not building any new ones	14	36	50	49	42	54
Forcing data centers to build or pay for any new energy systems they require, so that they don't put strain on the energy supply in communities where they are building or raise utility costs for consumers	15	34	50	44	43	58

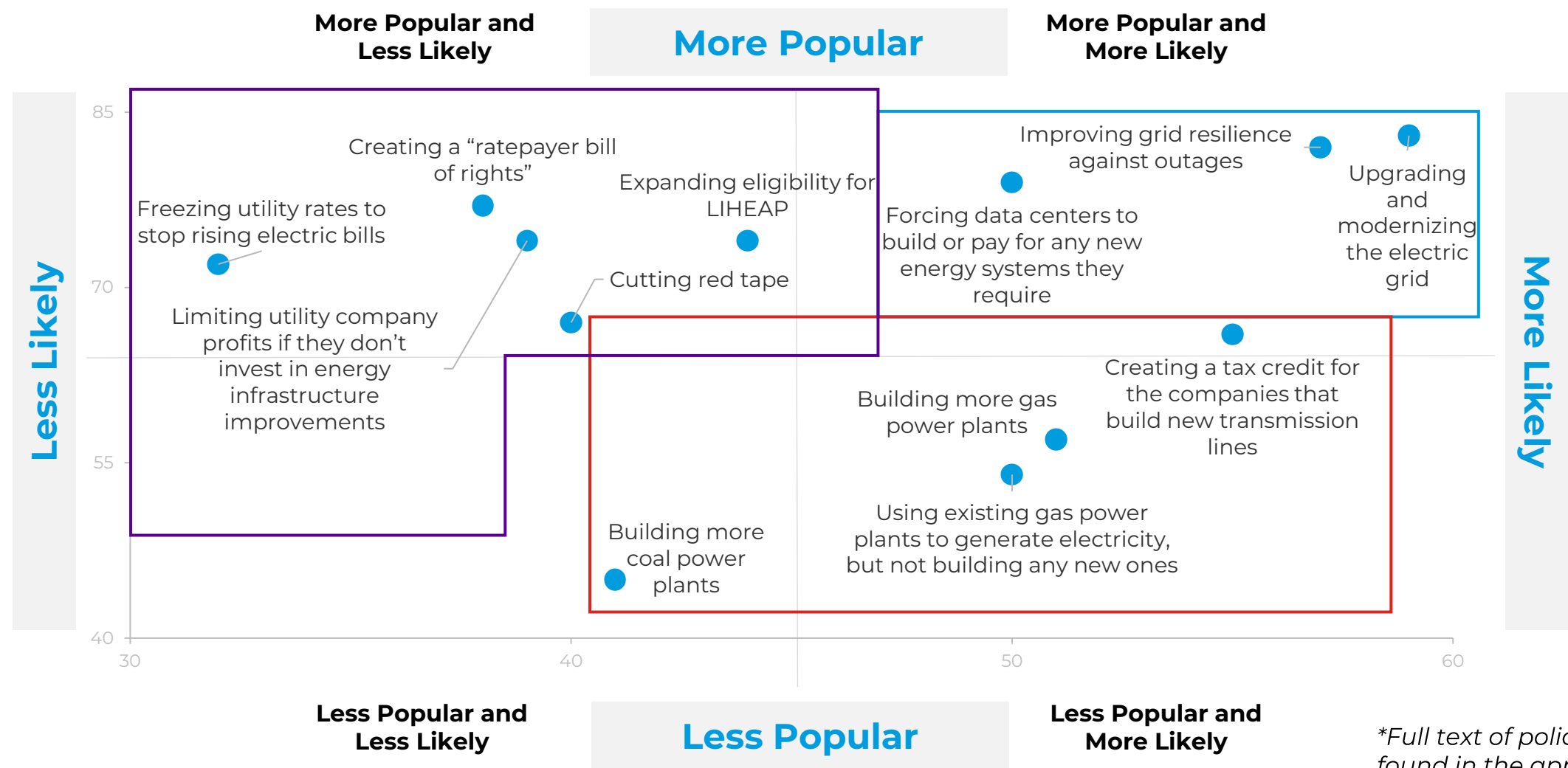
Policies that would directly lower costs are seen as less likely to come to fruition

Perceived Likelihood of Energy Policies (Bottom 6 of 12 Tested)

	% Likely		Overall	Dem	Ind	Rep
	% Very likely	% Somewhat likely				
Expanding eligibility for the Low Income Home Energy Assistance Program to provide more working families the same opportunity to get direct aid on utility bills	13	31	44	40	41	50
Building more coal power plants to generate more electricity to keep up with demand	12	29	41	43	35	40
Cutting red tape and streamlining the federal permitting process for clean energy	10	29	40	36	31	46
Limiting utility company profits if they don't invest in energy infrastructure improvements	11	28	39	37	34	43
Creating a "ratepayer bill of rights" that would protect people from massive rate hikes, prevent people from having their power shut off during surges, and provide more oversight and accountability for utility companies	13	26	38	33	37	45
Freezing utility rates to stop rising electric bills until large amounts of clean energy are deployed, the grid is modernized, and increased electricity brings costs down on their own	12	20	32	28	31	35

Other Policies: improving grid and forcing data centers to pay their fair share are seen as likely and popular. Gas and coal use more likely, less popular; policies to check utility companies/bills popular, but not likely

Perceived Likelihood v. Support for Energy Policies*



**Full text of policies can be found in the appendix*

After messaging, voters largely stay where they started on views of impacts of clean energy. We move the needle on connecting transmission lines to the environment and lower costs

Impacts of Building Clean Energy and Battery Storage / Building and Upgrading Transmission Lines

% **Positive**

	Clean Energy			Transmission Lines		
	Initial	Final	Shift	Initial	Final	Shift
Job creation in the short term (next 1-2 years)^	68	70	+2	69	71	+2
The supply of electricity in the U.S.	66	66	0	69	71	+2
Job creation in the long term (next 5-10 years)^	64	65	+1	66	67	+1
The reliability of the electricity system	62	63	+1	70	70	0
The environment	60	58	-2	46	52	+6
Climate change	53	55	+2	39	48	+9
Your utility bills	49	52	+3	44	50	+6
Your cost of living	45	48	+3	40	46	+6

Clear connection between clean energy and transmission lines and job creation, energy supply, and reliability, but connection to lower costs less clear

Impacts of Building Clean Energy and Battery Storage / Building and Upgrading Transmission Lines

% *Positive*

	Clean Energy		Transmission Lines	
	Overall	CE Swing	Overall	TL Swing
Job creation in the short term (next 1-2 years)^	68	51	69	56
The supply of electricity in the U.S.	66	51	69	52
Job creation in the long term (next 5-10 years)^	64	54	66	53
The reliability of the electricity system	62	49	70	56
The environment	60	47	46	35
Climate change	53	37	39	31
Your utility bills	49	38	44	35
Your cost of living	45	33	40	32