GSG FOR CLIMATE POWER, JULY 2026

Data Centers and Affordability

Research Update: How the Landscape Has Shifted between April and July

GSG POLITICAL

Methodology

Surveys

Global Strategy Group conducted two surveys, each with a base sample of **1,000 registered voters nationwide** between April 9–19 and June 22–29, 2026.

Both surveys included additional oversamples of:

- 300 Black, Hispanic, and AAPI voters (100 each)
- 100 self-identified independent voters
- 70 urban voters in states with Democratic governors
- 215 urban voters in states with Republican voters

The April survey also included oversamples of:

- 260 rural voters in counties with contested data centers
- 90 suburban/urban voters in counties with contested data centers

The June survey also included oversamples of:

- 110 voters in states with lean/likely Democratic governor races in 2026 (MI, CA, CO, ME, NM, MN)
- 160 voters in states with toss-up governor races in 2026 (AZ, GA, IA, NV, WI)
- 250 voters in states with lean Republican governor races in 2026(KS, OH)

Discussion Board

Global Strategy Group conducted an **online discussion board** among **33 soft partisans** nationwide between May 19 and May 22, 2026.

Care was taken to ensure the journal contained a mix of voters across gender, age, ethnicity, and level of education.

Soft partisans:

- Likely 2026 voters
- Do not have strong opinions on data centers and are not very favorable to Trump
- Do not feel confident in their personal financial situations and feel like their utility bills are rising
- Are somewhat concerned about climate change and somewhat support local and state leaders taking action

Key Findings

1

Cost is ultimately the lens through which voters view all conversations around energy.

Voters are acutely focused on rising utility bills and blame utility companies, oil and gas companies, politicians, and increasingly data centers and the companies behind data centers. They want solutions that lower costs without shifting them onto working families.

2

Public opinion on data centers has turned sharply negative, with support dropping across the board.

Since April, data centers have gone from a relatively neutral issue to a growing political liability, with voters increasingly believing they drive up electricity demand, utility bills, and pressure on the grid. Voters' greatest concerns about having a local data center are that it will drive up their utility costs. Pairing data centers with clean energy dramatically increases support, but voters remain skeptical of any energy investments unless there are strong safeguards to ensure tech companies – not ratepayers – cover the costs and communities are protected.

3

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.

4

Voters back requiring data centers to fund infrastructure and want the cheapest energy source – clean energy – to keep costs down.

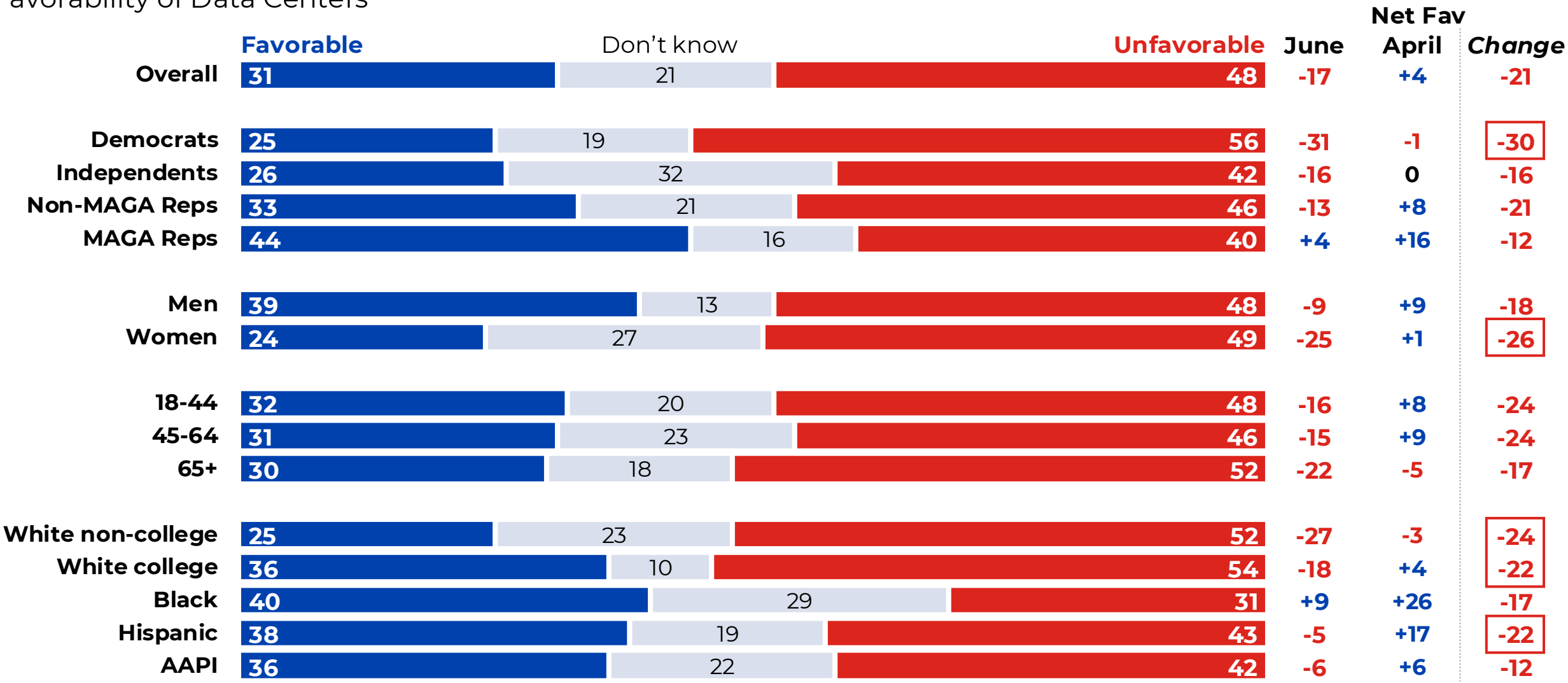
Voters overwhelmingly support requiring data centers to pay for the infrastructure they need, and believe consumers are more likely to be protected when tech companies bear the costs than when utility companies do. The strongest messaging combines affordability, grid reliability, and corporate accountability, making clear that working families shouldn't foot the bill, while also explaining how clean energy brings costs down long-term.

Landscape

June Data

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

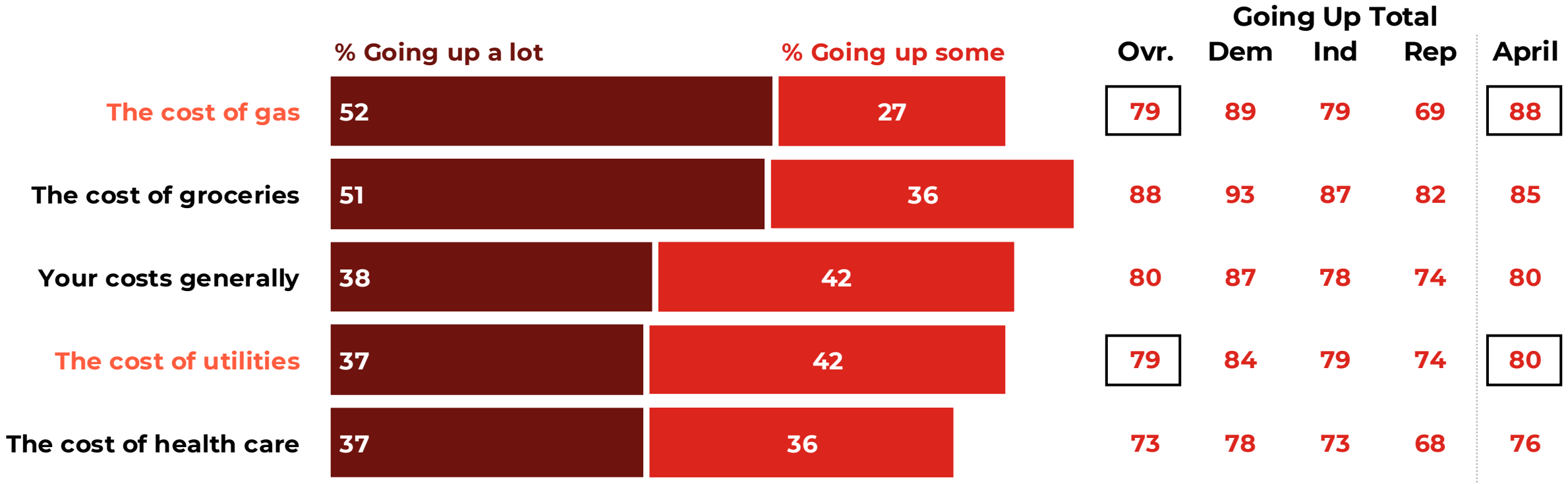
Favorability of Data Centers



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 since April

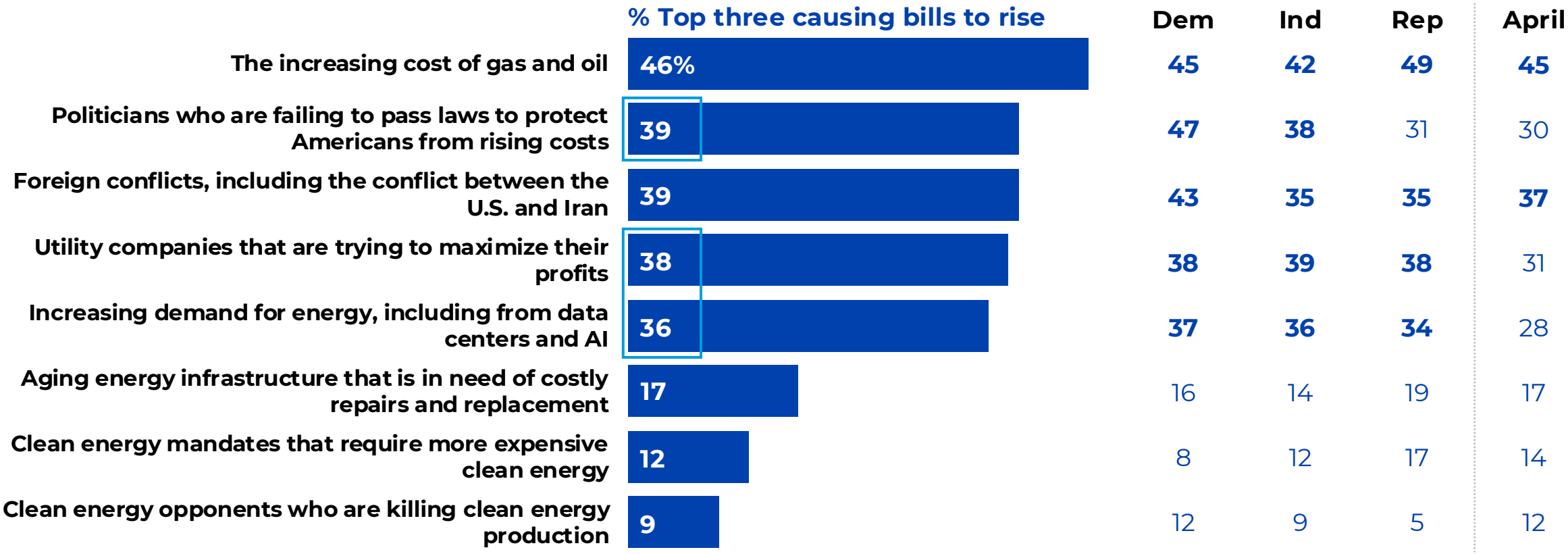
Please indicate, for each one, whether you feel like those costs are going up, going down, or staying the same.



	Going Up Total				
	Ovr.	Dem	Ind	Rep	April
The cost of gas	79	89	79	69	88
The cost of groceries	88	93	87	82	85
Your costs generally	80	87	78	74	80
The cost of utilities	79	84	79	74	80
The cost of health care	73	78	73	68	76

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.



	% Top three causing bills to rise	Dem	Ind	Rep	April
The increasing cost of gas and oil	46%	45	42	49	45
Politicians who are failing to pass laws to protect Americans from rising costs	39	47	38	31	30
Foreign conflicts, including the conflict between the U.S. and Iran	39	43	35	35	37
Utility companies that are trying to maximize their profits	38	38	39	38	31
Increasing demand for energy, including from data centers and AI	36	37	36	34	28
Aging energy infrastructure that is in need of costly repairs and replacement	17	16	14	19	17
Clean energy mandates that require more expensive clean energy	12	8	12	17	14
Clean energy opponents who are killing clean energy production	9	12	9	5	12

April Data

Data center NIMBYs: while voters are divided on both measures, there is more support for data centers nationally than in voters' backyards

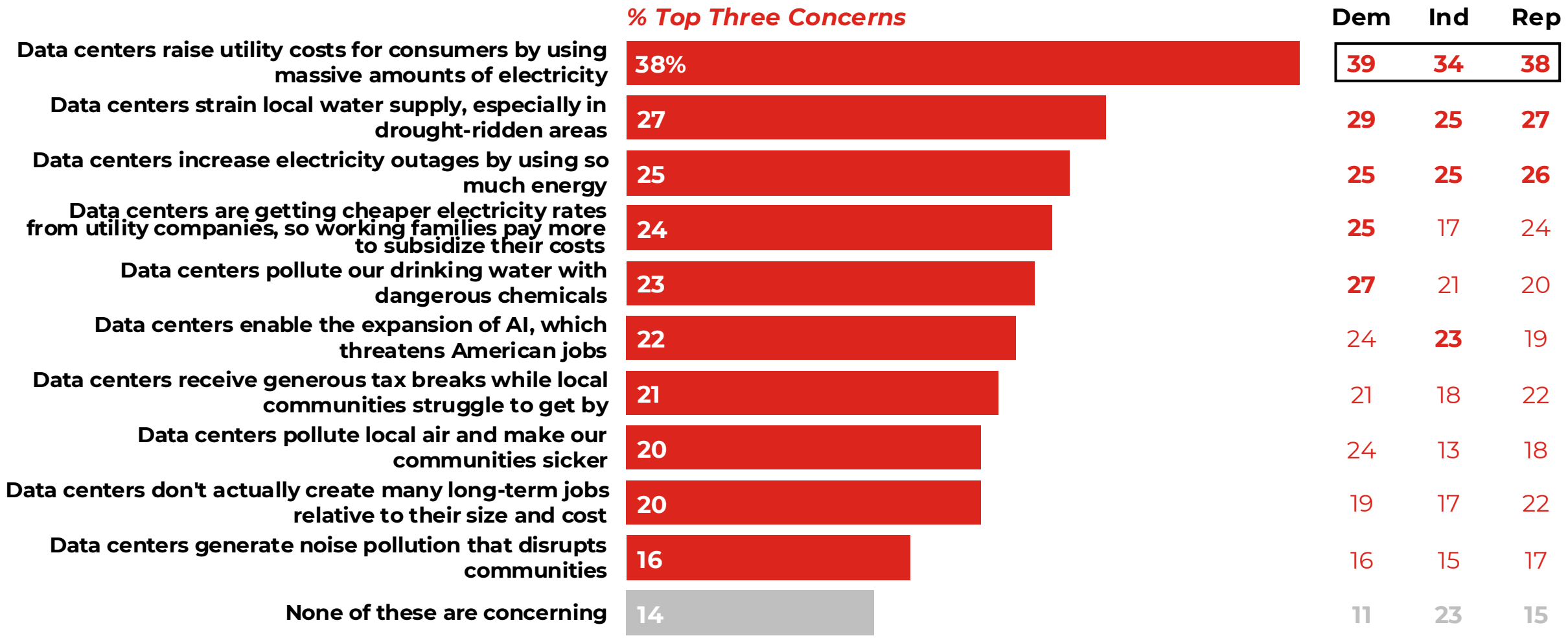
Do you support or oppose data centers being built...

	In the U.S.				In your community				
	Support	Oppose	Not sure	Net Support	Support	Oppose	Not sure	Net Support	*Diff in Net Support*
Overall	43	34	23	+9	35	44	22	-9	-18
Democrat	42	37	21	+5	34	47	19	-13	-18
Independent	33	28	39	+5	25	38	37	-13	-18
Non-MAGA Rep	44	31	25	+13	31	46	23	-15	-28
MAGA Rep	51	33	16	+18	44	40	17	+4	-14
White non-college	36	37	27	-1	29	46	25	-17	-16
White college	54	31	14	+23	41	44	15	-3	-26
Black	51	26	23	+25	42	35	23	+7	-18
Hispanic	42	38	20	+4	41	44	15	-3	-7
AAPI	39	27	34	+12	30	38	32	-8	-20
Men	51	34	15	+17	43	43	14	0	-17
Women	36	34	30	+2	27	44	28	-17	-19
18-44	45	35	21	+10	42	40	19	+2	-8
45-64	40	32	27	+8	30	43	27	-13	-21
65+	44	35	22	+9	28	51	21	-23	-32
Current DC	44	35	20	+9	36	45	19	-9	-18
Upcoming DC	47	35	18	+12	37	46	17	-9	-21
Contested DC-rur	30	45	25	-15	26	55	19	-29	-14
Contested DC-sub/urb	44	36	20	+8	37	45	18	-8	-16

April Data

The greatest concern on having a local data center is the impact on utility costs, followed by water and electricity strains and favored rates/subsidies for DCs

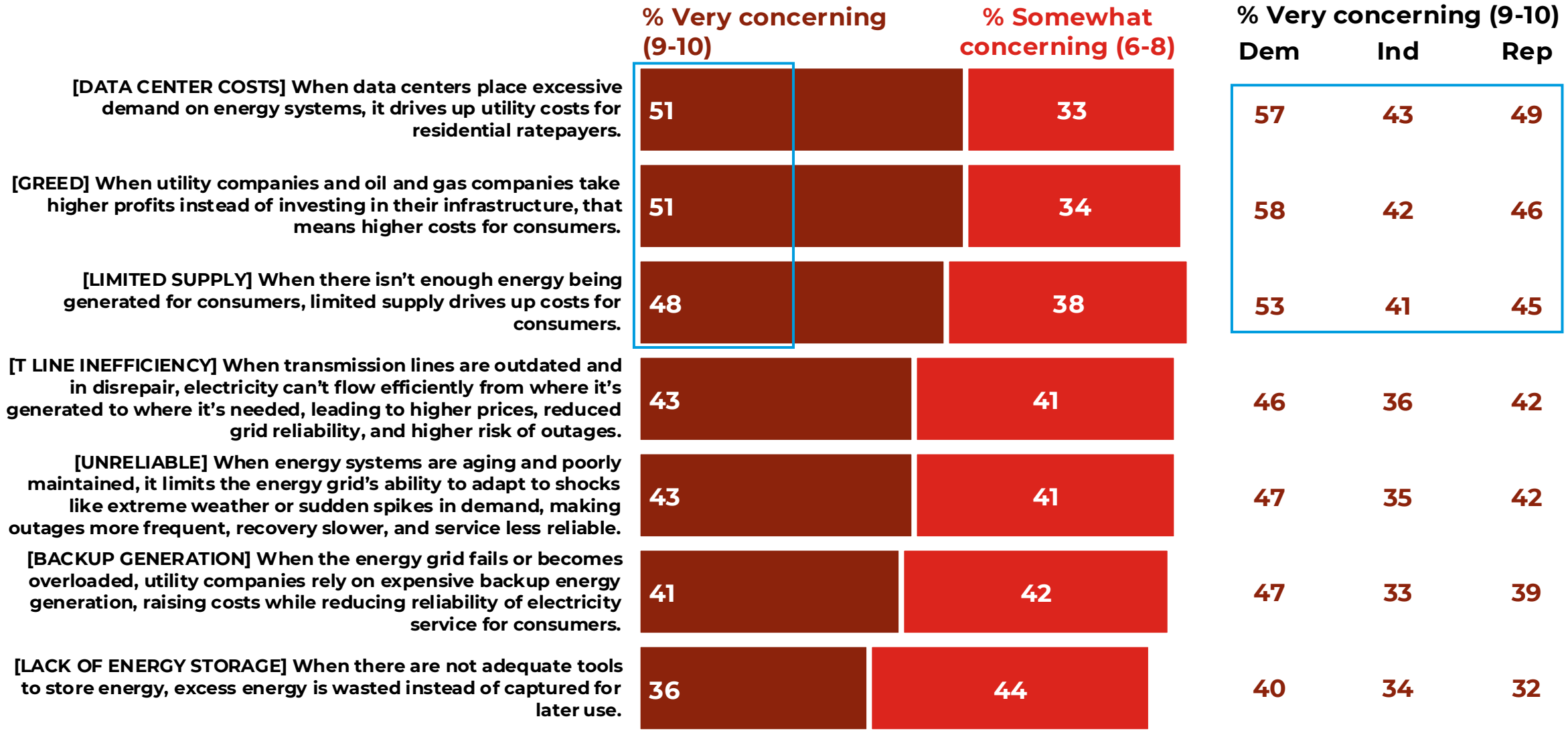
Most concerning aspects of having a data center in community



June Data

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

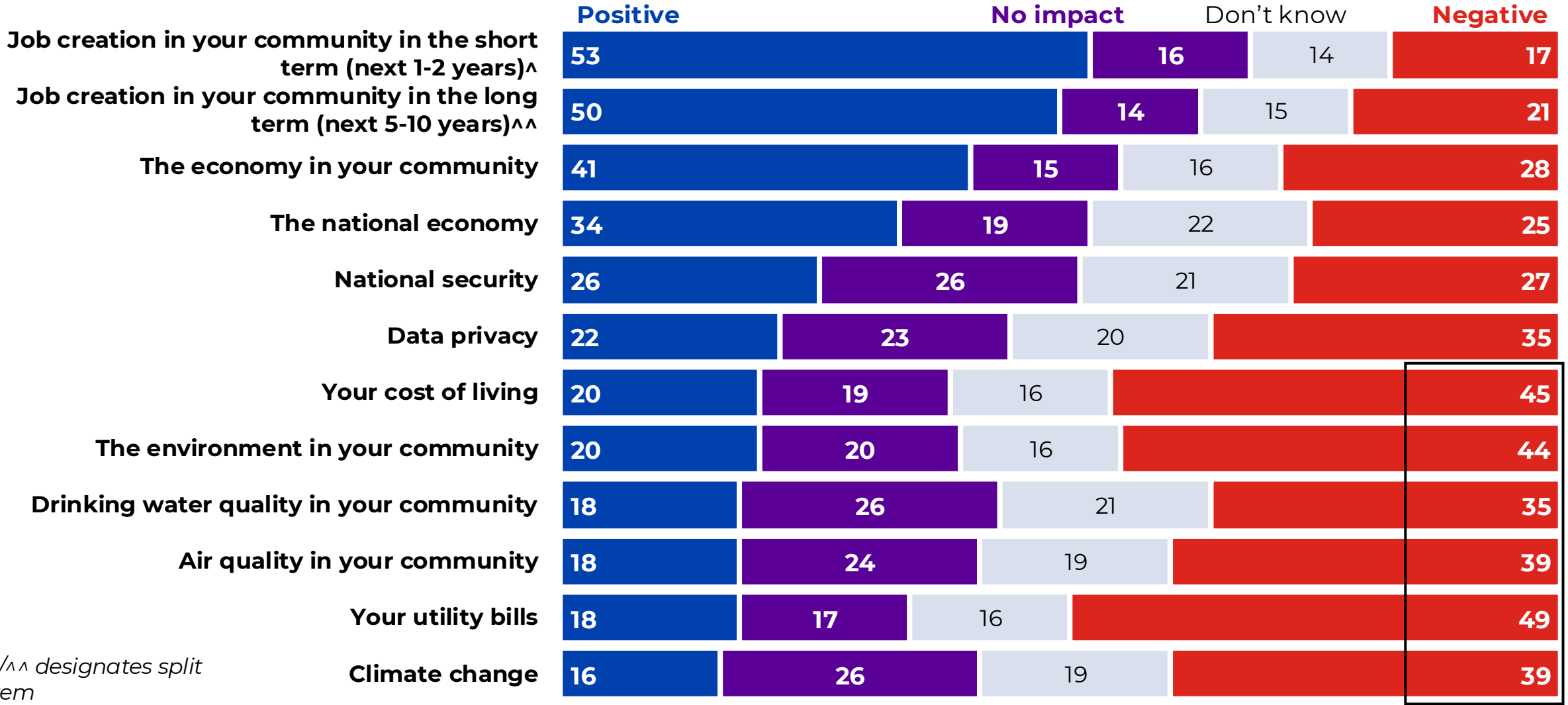
Concerns About the Energy System – 1 to 10 Scale



Data Center Policies

Voters see macroeconomic benefits from data centers, but negative impact on the environment and costs

Indicate whether you think a local data center would positively impact, negatively impact, or not impact each one.



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April Data

Earlier this year, introducing clean energy boosted support for local data centers, bringing Democrats, independents, and non-MAGA GOP into the fold

Support for community data centers

	Do you support or oppose a data center being built in your community?				Would you support or oppose a data center being built in your community **if it was powered by clean energy like wind and solar instead of fossil fuels**?				
	Support	**Oppose**	**Not sure**	**Net Support**	**Support**	**Oppose**	**Not sure**	**Net Support**	***Diff in Net Support***
Overall	**35**	**44**	22	**-9**	**58**	**27**	14	**+31**	**+40**
Democrat	**34**	**47**	19	**-13**	**64**	**23**	13	**+41**	**+54**
Independent	**25**	**38**	37	**-13**	**52**	**23**	25	**+29**	**+42**
Non-MAGA Rep	**31**	**46**	23	**-15**	**56**	**31**	13	**+25**	**+40**
MAGA Rep	**44**	**40**	17	**+4**	**52**	**35**	12	**+17**	**+13**
White non-college	**29**	**46**	25	**-17**	**54**	**30**	16	**+24**	**+41**
White college	**41**	**44**	15	**-3**	**63**	**27**	10	**+36**	**+39**
Black	**42**	**35**	23	**+7**	**62**	**22**	15	**+40**	**+33**
Hispanic	**41**	**44**	15	**-3**	**64**	**26**	11	**+38**	**+41**
AAPI	**30**	**38**	32	**-8**	**57**	**23**	20	**+34**	**+42**
Men	**43**	**43**	14	**0**	**62**	**27**	11	**+35**	**+35**
Women	**27**	**44**	28	**-17**	**55**	**27**	17	**+28**	**+45**
18-44	**42**	**40**	19	**+2**	**64**	**24**	11	**+40**	**+38**
45-64	**30**	**43**	27	**-13**	**58**	**24**	18	**+34**	**+47**
65+	**28**	**51**	21	**-23**	**49**	**35**	15	**+14**	**+37**
Current DC	**36**	**45**	19	**-9**	**59**	**29**	13	**+30**	**+39**
Upcoming DC	**37**	**46**	17	**-9**	**62**	**27**	11	**+35**	**+44**
Contested DC-rur	**26**	**55**	19	**-29**	**53**	**32**	16	**+21**	**+50**
Contested DC-sub/urb	**37**	**45**	18	**-8**	**61**	**28**	11	**+33**	**+41**

Clean data centers completely shifted perceptions of cost impacts from data centers

Indicate whether you think a local data center that would be powered by clean energy would positively impact, negatively impact, or not impact each one.

% Positive + No Impact	General	Overall Clean Energy	*Shift*
Job creation in your community in the long-term (next 5-10 years)^^	64	74	*+10*
Job creation in your community in the short-term (next 1-2 years)^	69	73	*+4*
The economy in your community	56	66	*+10*
The national economy	54	64	*+10*
The environment in your community	40	58	*+18*
Climate change	42	61	*+19*
Air quality in your community	43	61	*+18*
Your utility bills	35	53	*+18*
Your cost of living	39	52	*+13*
National security	53	59	*+6*
Drinking water quality in your community	45	57	*+12*
Data privacy	45	53	*+8*

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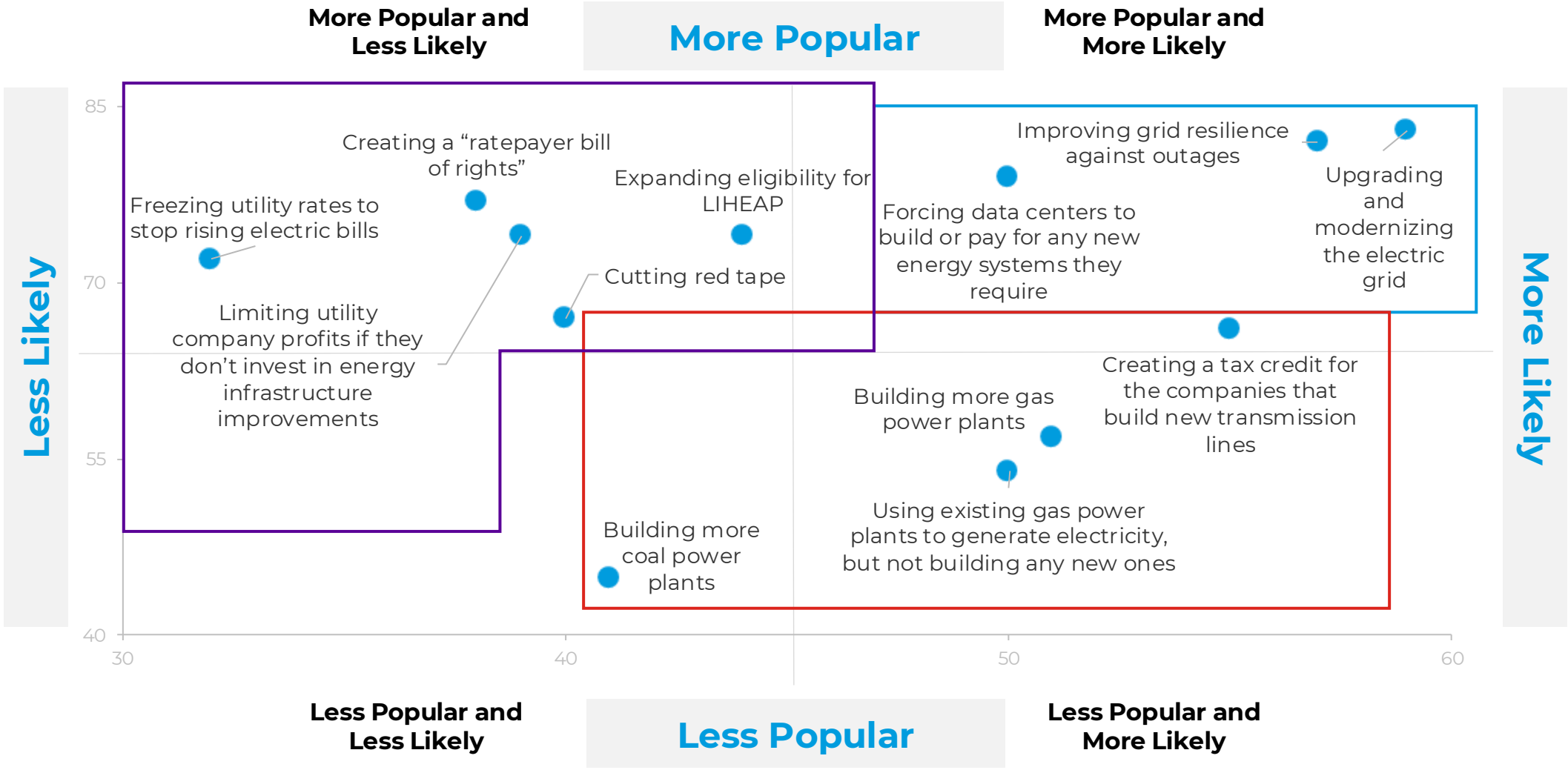
Other Policies: improving the grid and increasing data center accountability are both most popular and seen as most likely to be enacted. Limiting utility company profits also popular – though seen as less likely

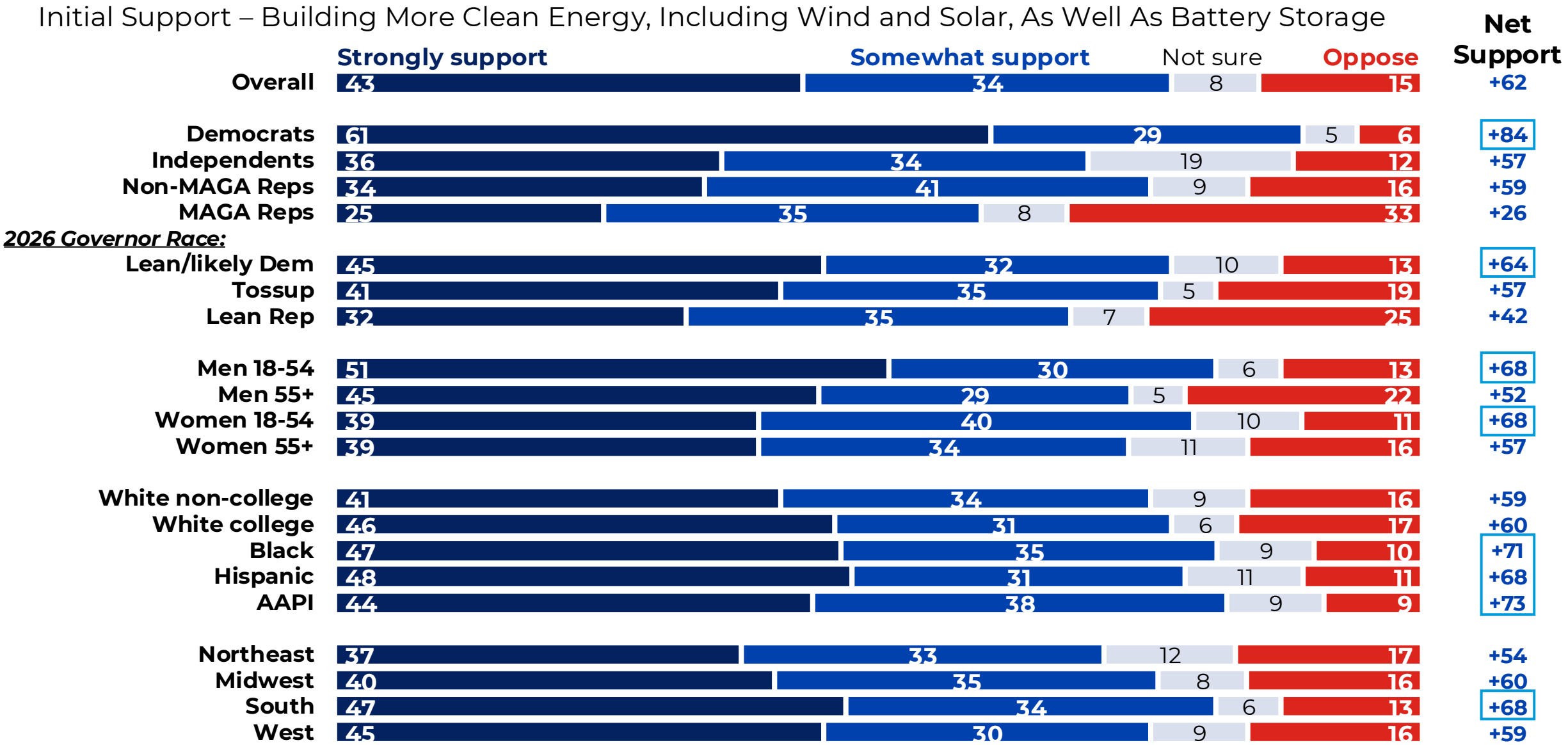
Perceived Likelihood v. Support for Energy Policies*



Passthrough Costs

June Data

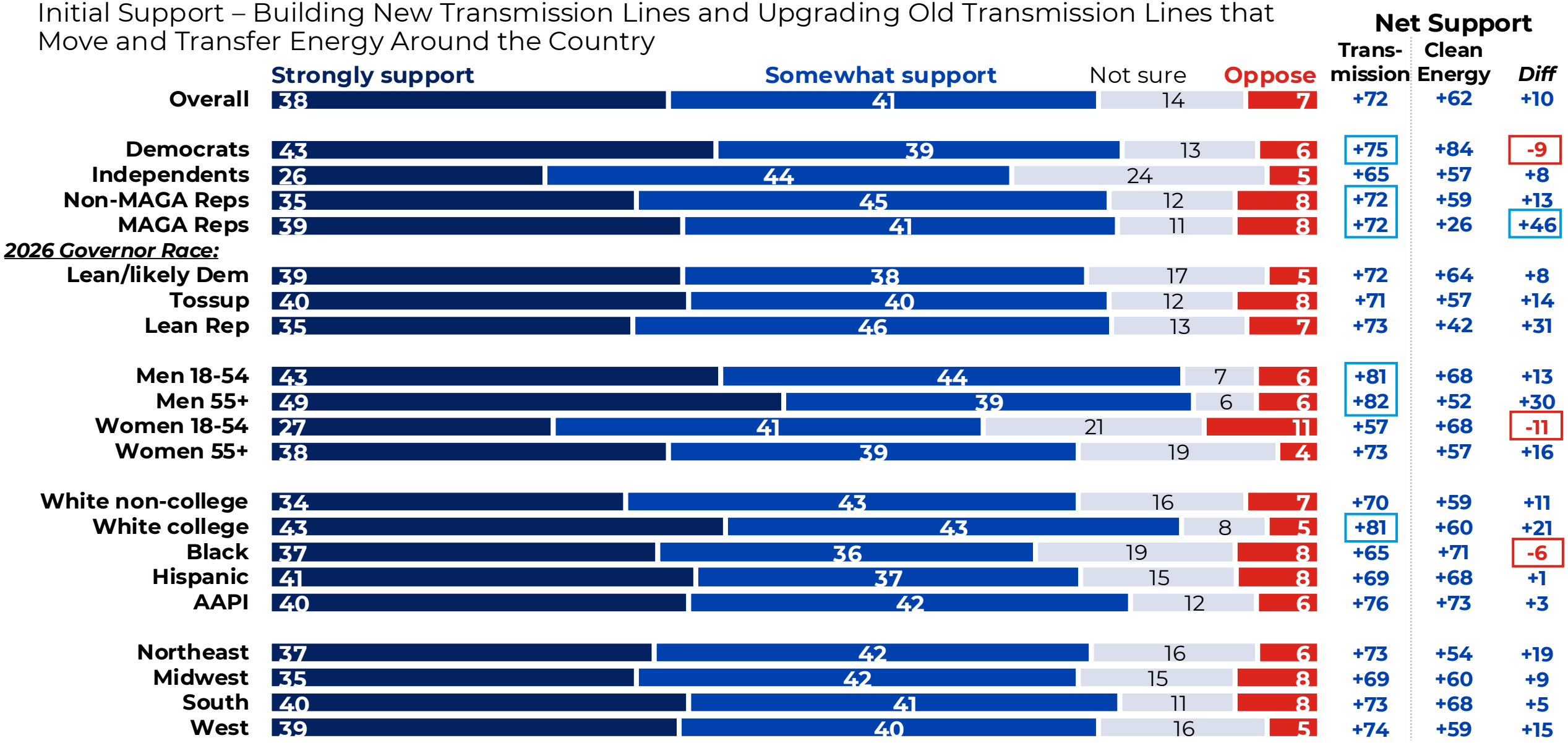
Clean energy expansion as a solution is broadly popular, especially with Democratic strongholds and young voters – though MAGA Republicans also support.



June Data

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



June Data

While these policies are popular, passthrough costs dominate voters' hesitations. 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?

		CE Weak Base	CE Swing	TL Weak Base	TL Swing
Tech companies building data centers and other large energy users^ / Large energy users, including tech companies building new data centers^^	40%	43	36	45	36
The government	26	29	24	23	29
Utility companies	21	20	22	23	20

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

		CE Weak Base	CE Swing	TL Weak Base	TL Swing
If utility companies have to pay for it	40%	42	37	44	38
If the government has to pay for it	23	25	21	25	22
If tech companies building data centers and other large energy users have to pay for it^ / If large energy users, including tech companies building new data centers, have to pay for it^^	20	20	22	21	20

^/^^ designates split item

Greatest Hesitations Around Full Policy Agenda

	% Top two greatest hesitation	Dem	Ind	Rep
I feel like the costs will ultimately get passed on to people like me	64%	63	62	66
They are hard to actually implement or enforce	34	33	29	36
There are other things I'd rather the government spend money on	20	20	18	21
They would not provide reliable power for the country	17	16	16	18
No hesitations around these policies	9	10	11	6

Messaging

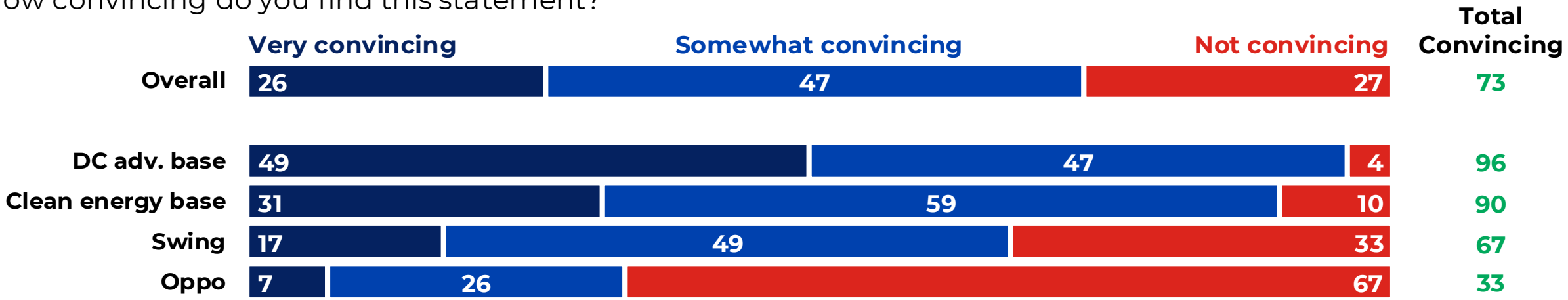
April Data

In the argument for clean data centers, focusing on how clean energy is cheaper and will lower costs is key

Highlighter Exercise – Pro-Clean Energy-Powered DCs

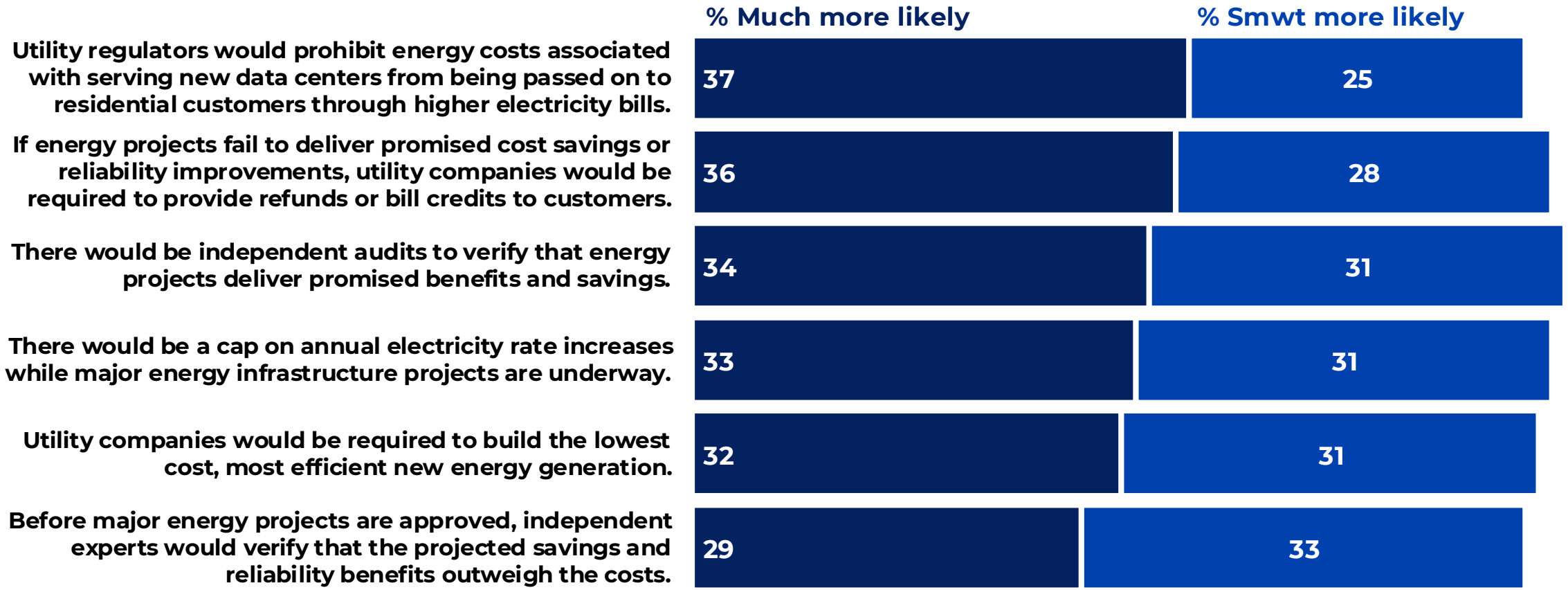
Data centers and AI are growing rapidly and will shape our future economy, presenting a major opportunity to drive local investments, strengthen national security, and accelerate the transition to cheaper clean energy like wind and solar. We can be pro-data center and pro-accountability. By having data center operators invest in new clean energy, grid upgrades and enhancements, and community energy like rooftop solar and battery storage in your neighborhood, these data centers can actually help lower bills for everyone in the community, while developing the energy abundance we need. By powering new data centers with clean energy, and making them part of the future of our community, we can ensure data centers support long-term, reliable, resilient grid infrastructure and bring broad, sustainable benefits for communities and the country while helping bring energy costs down.

How convincing do you find this statement?



The most popular policies prevent costs from being passed on to ratepayers

Likelihood of Supporting Agenda with Safeguards



June Data

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

Ovr.	CE Weak Base	CE Swing	TL Weak Base	TL Swing	Either Cost 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 energy investments to the White House ballroom/frivolous spending, as well as the war with Iran, is most convincing to get voters to support spending money on energy investments

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

Ovr.	Dem	Ind	Rep	
	% 9-10 convincing out of 10			
41	**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	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	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	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.

Thank You

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