GSG FOR AMERICA IS ALL IN, JULY 2026

# **What Moves Residents:** New Polling on Clean Energy, Data Centers, and the Grid



GSG POLITICAL

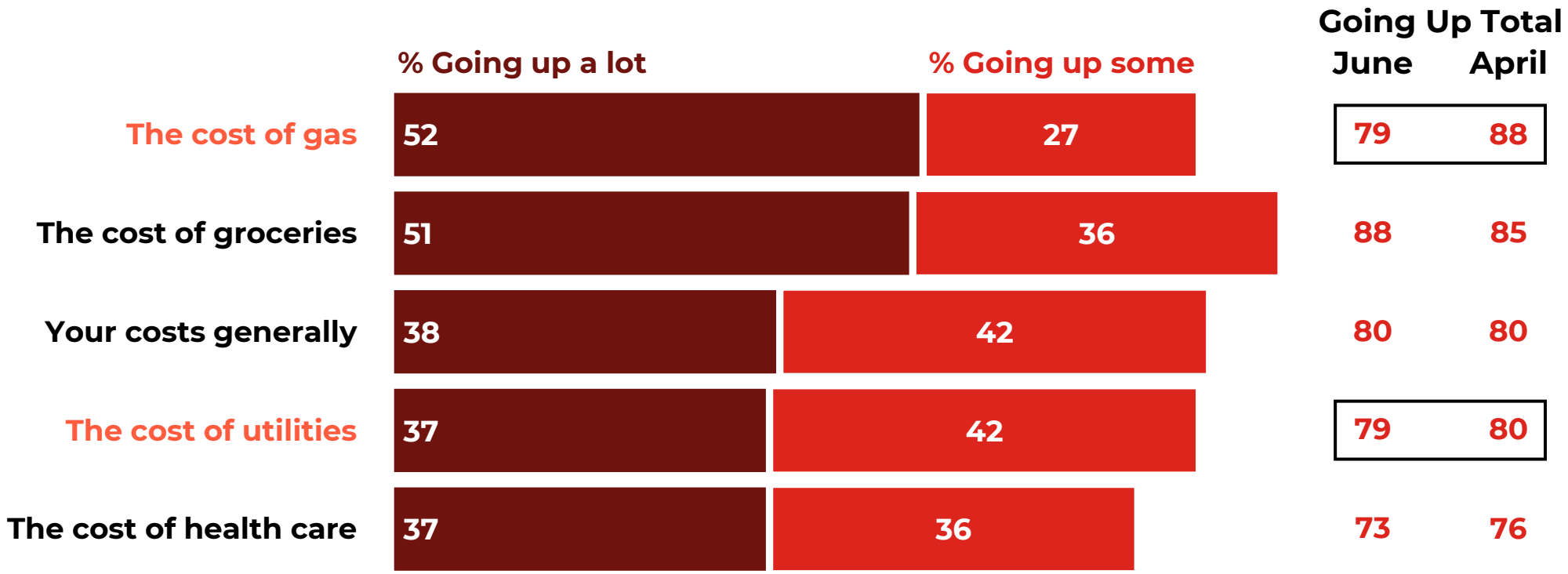
# Landscape

# Key Findings

1. Cost is the lens through which voters view every energy issue.
2. Data centers are increasingly seen as straining the energy system.
3. Residents see the grid as outdated and in need of modernization, but only if the investment is worth the cost and ratepayers are not left footing the bill.
4. Residents support expanding clean energy, but not abandoning fossil fuels overnight.
5. Reliability matters, but cost matters more. Clean energy's reliability remains a vulnerability, but the affordability of clean energy is an asset.

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

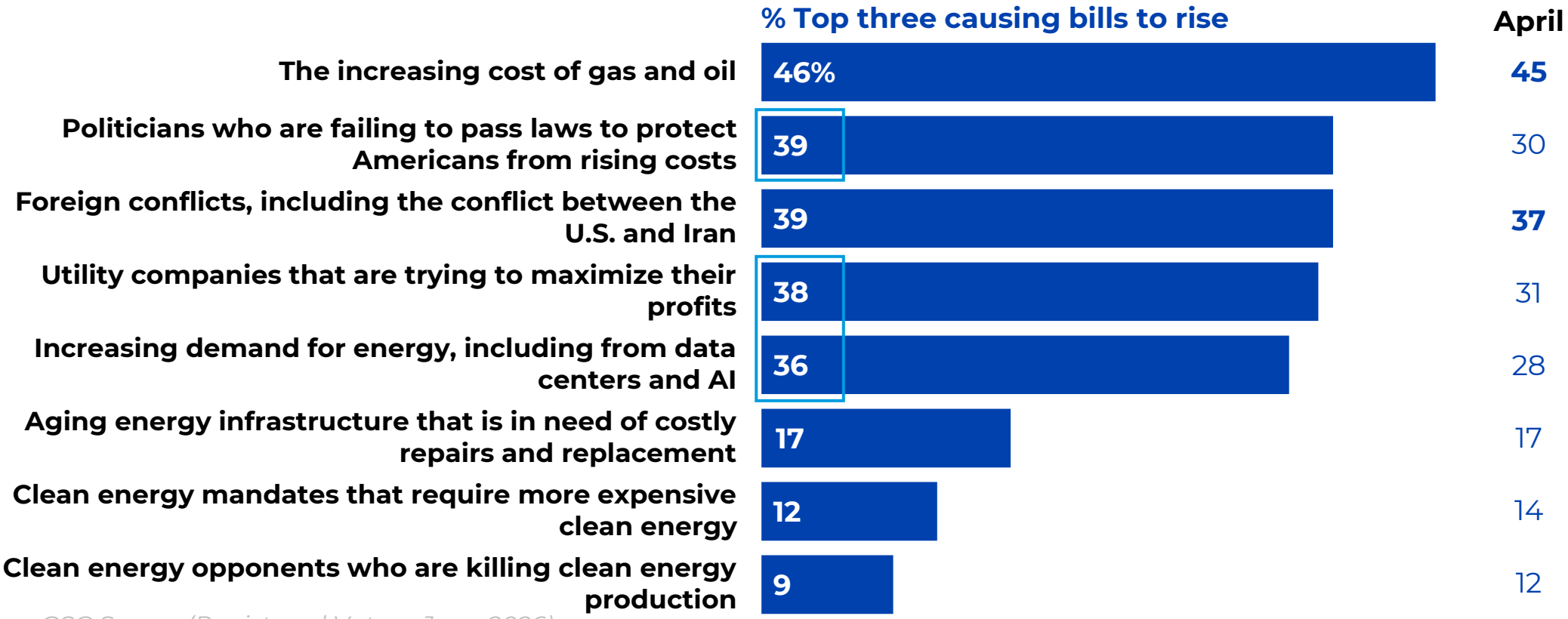
Please indicate, for each one, whether you feel like those costs are going up, going down, or staying the same.




*Source: GSG Survey (Registered Voters, June 2026)*

# 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

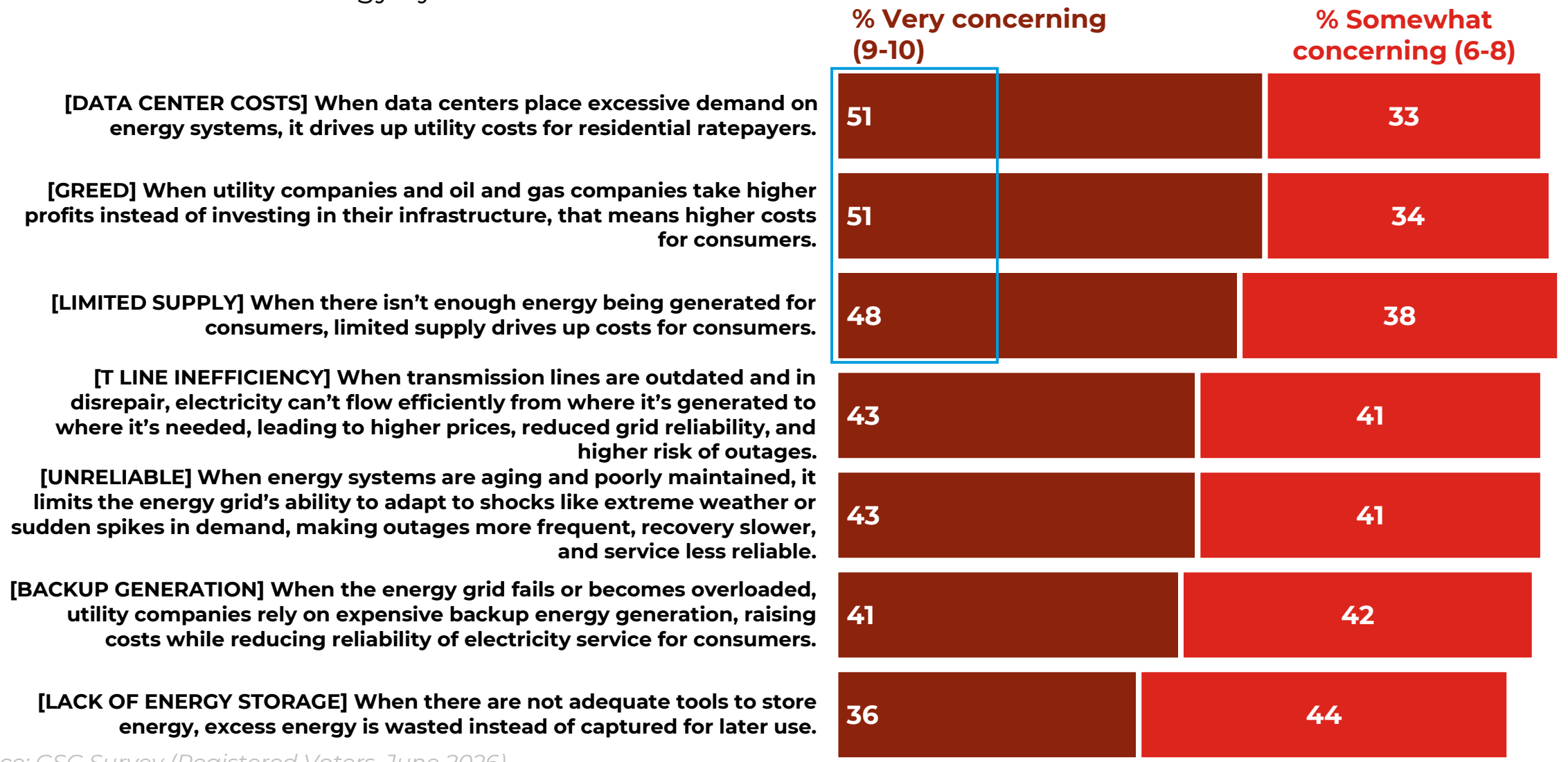
[If said cost of utilities is going up] Who or what would you say is causing utility bills to rise? Select up to three.




*Source: GSG Survey (Registered Voters, June 2026)*

# Residents' 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



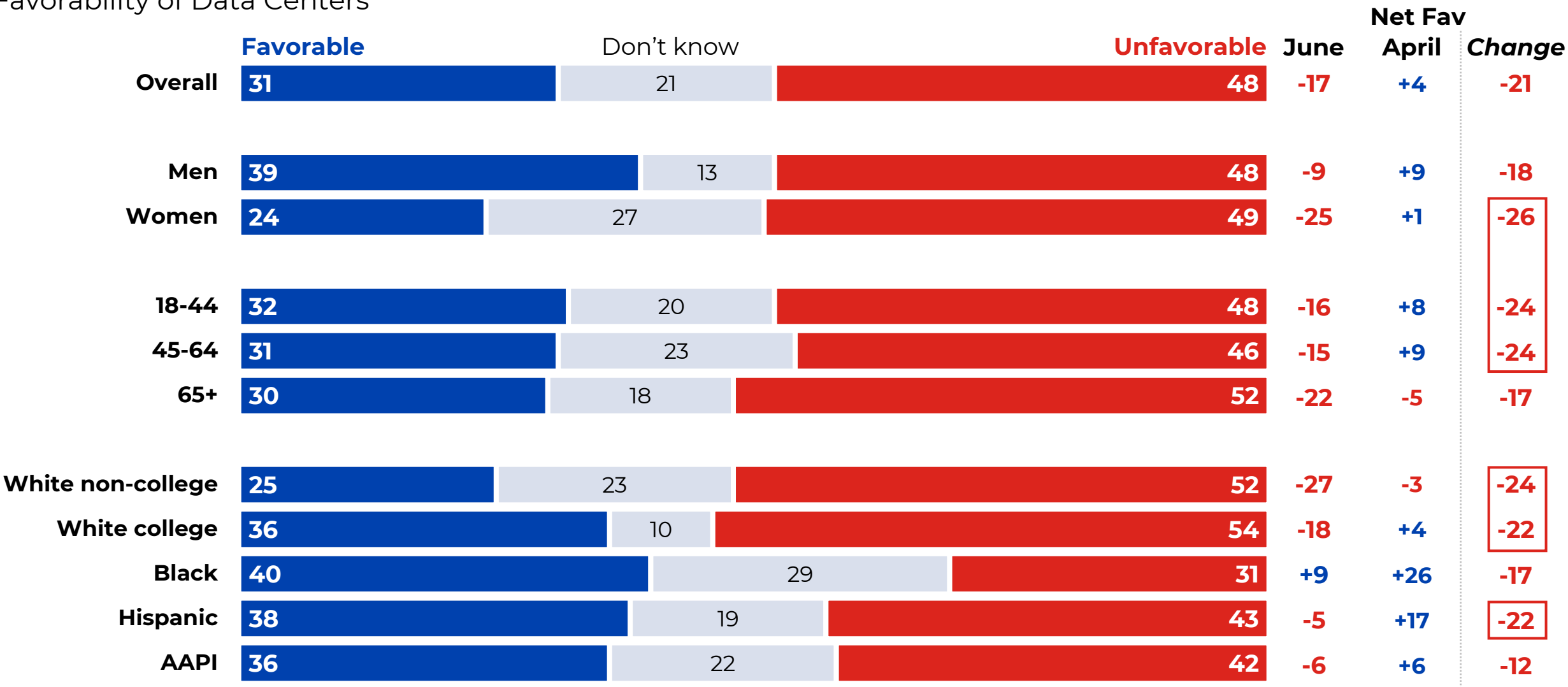

*Source: GSG Survey (Registered Voters, June 2026)*

# Data Centers

June Data

# Public opinion on data centers has shifted dramatically, particularly with women, younger residents, white residents, and Hispanic residents

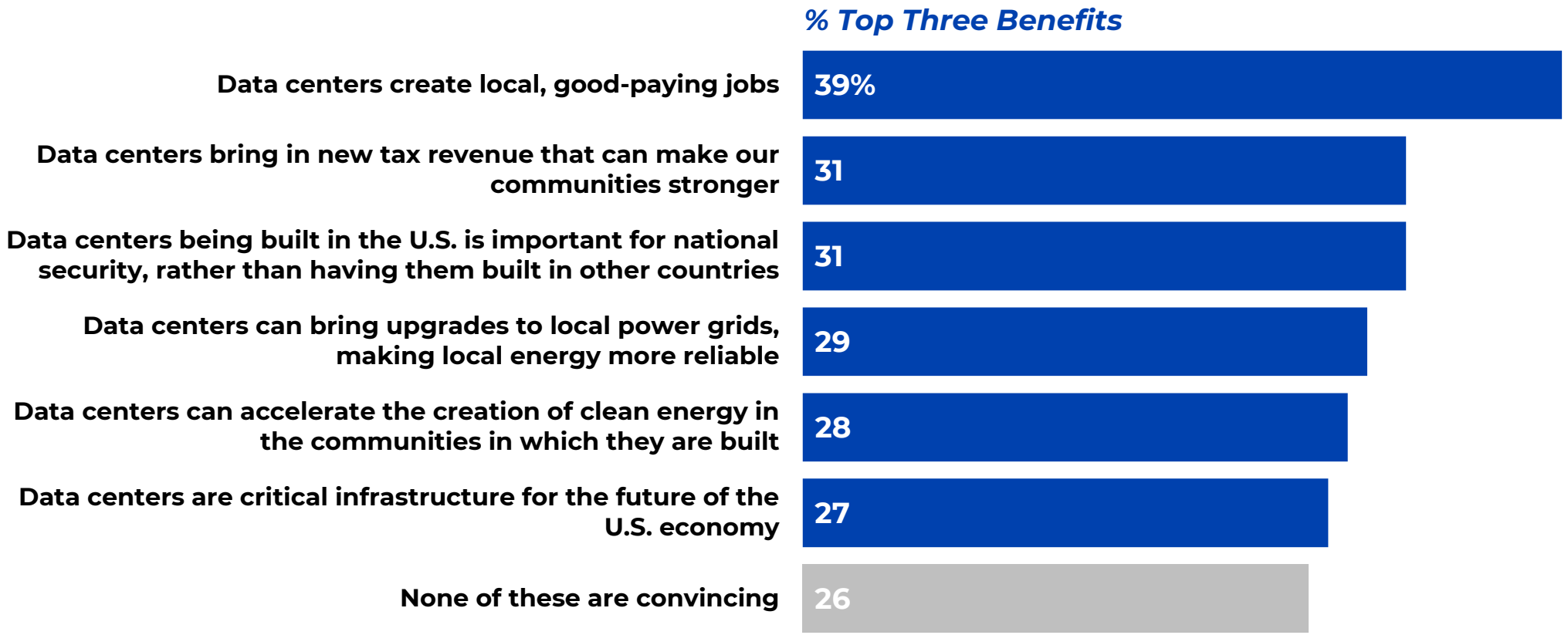
Favorability of Data Centers




*Source: GSG Survey (Registered Voters, June 2026)*

# Job creation is the best reason for many to support local data centers. Secondary benefits include local tax revenue, national security, and investing in local power grids

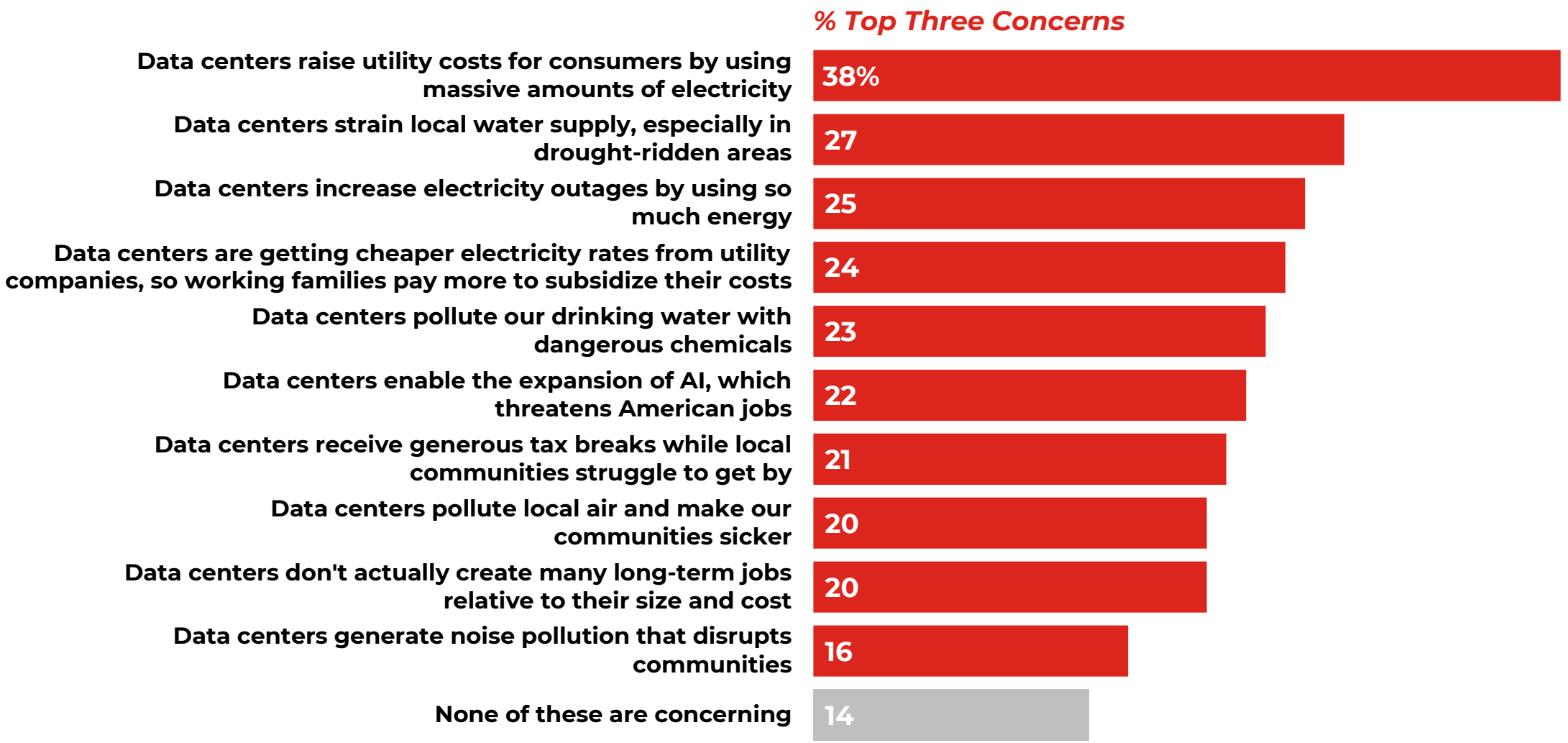
Most convincing reasons to support data center in community




*Source: GSG Survey (Registered Voters, April 2026)*

# The greatest concern on data centers 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

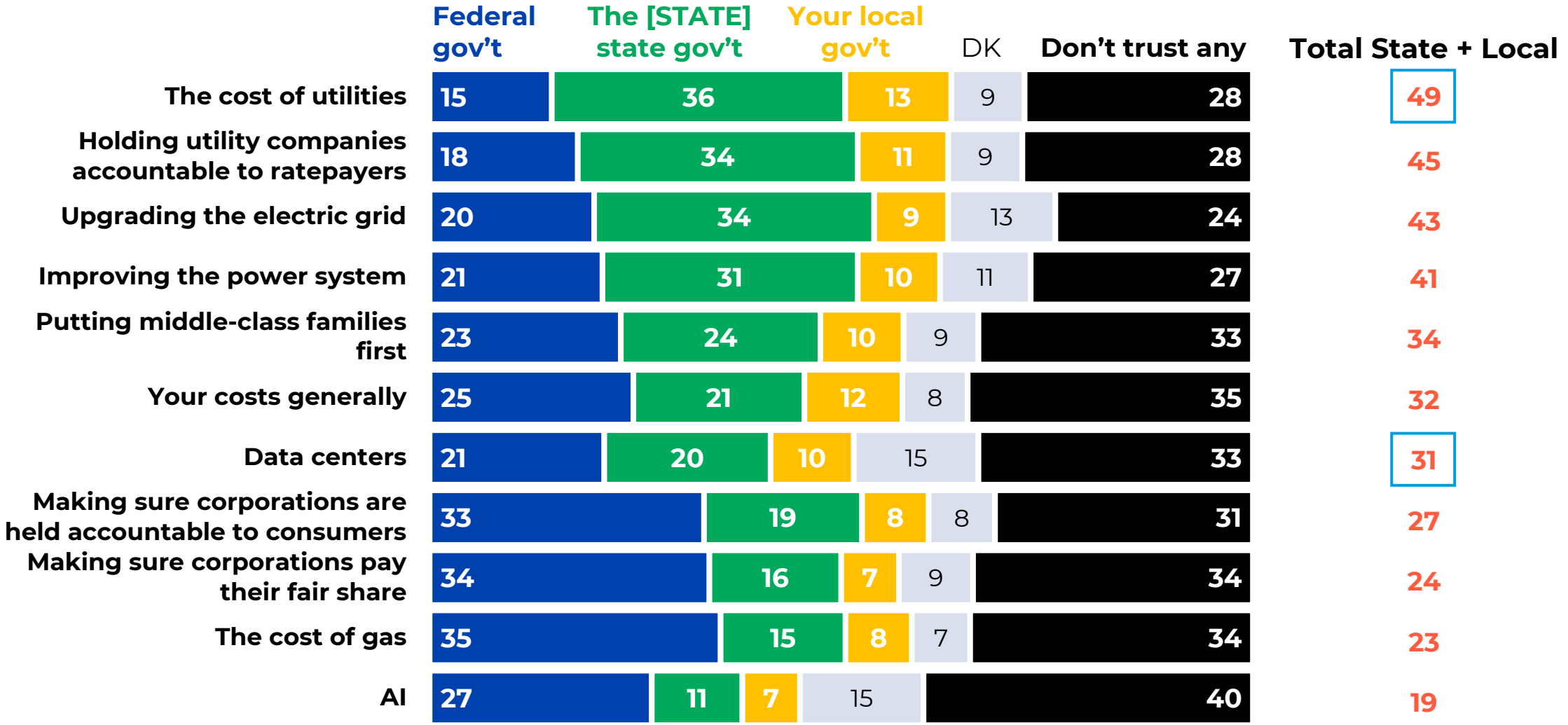



*Source: GSG Survey (Registered Voters, April 2026)*

June Data

# Taken together, residents trust state and local government more than the federal government on utility costs and data centers

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

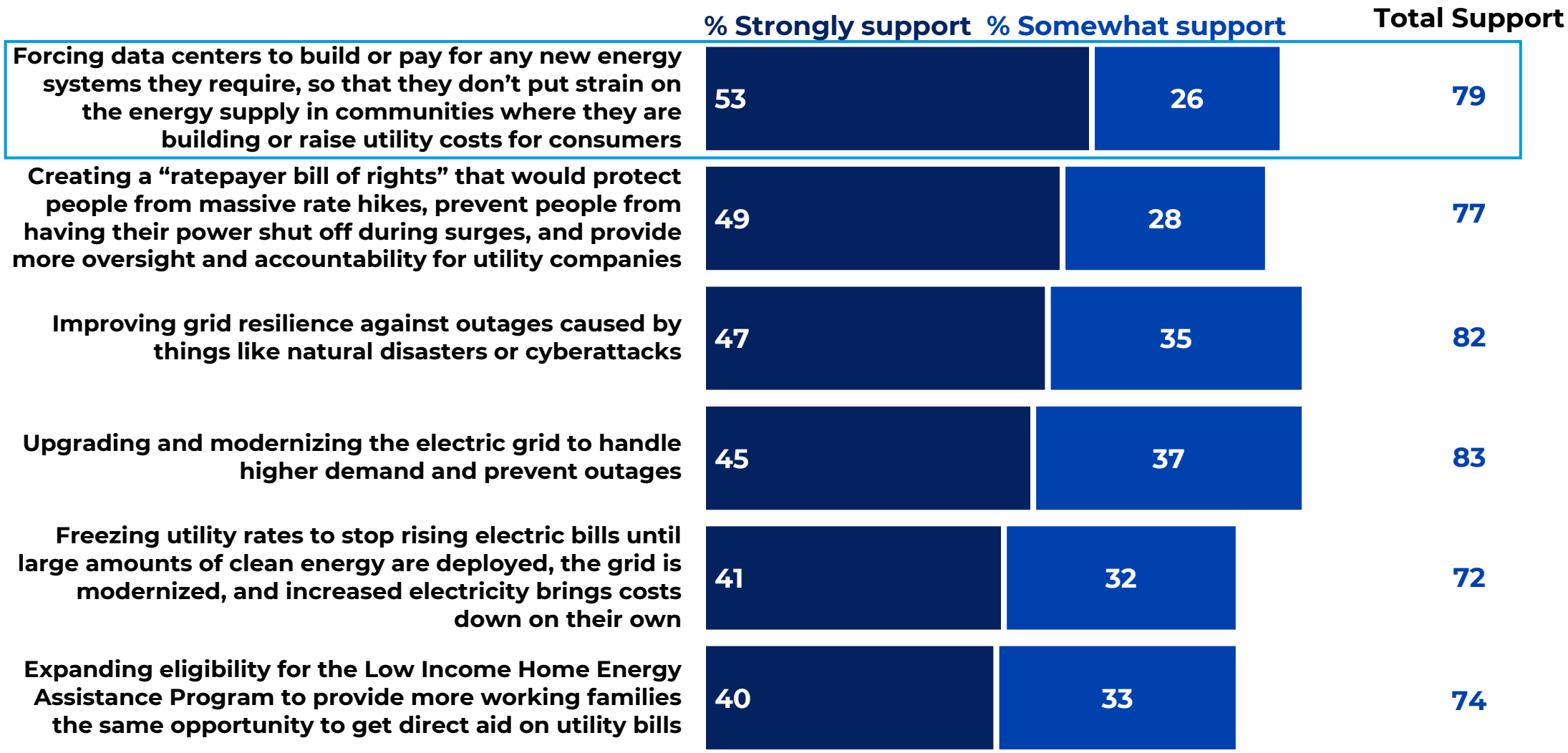



*Source: GSG Survey (Registered Voters, June 2026)*

June Data

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

Support for Energy Policies (Top 6 of 12 Tested)




*Source: GSG Survey (Registered Voters, June 2026)*

# Grid Reliability

# When it comes to the reliability of our electricity system, residents' views are determined by their lived experiences: those in areas more prone to natural disasters and outages are more focused on reliability

**Natural disasters are THE big driver of electricity unreliability for these residents – some also bring up the dynamic of living in a rural community as a culprit. Water quality issues also emerge: unsurprisingly, much of this is regional.**

"***Power outages just a few weeks ago crazy out of [nowhere] it goes out…Our climate has changed through the years. Better weather but also warmer that it was 30yrs ago.*** *It's very un-settling how it goes out at least we have a gas stove…****Very stressful as [a] senior. Who can afford all these changes?***"
*– Hispanic woman, West, 64*

"***Living in the South in a very rural area, I experience sporadic power outages.*** *The duration is usually less than 30 mins.* ***I can foresee my water quality being affected soon due to my water provided infrastructure is old and needs to be replaced.***"
*– Black man, Southeast, 65*

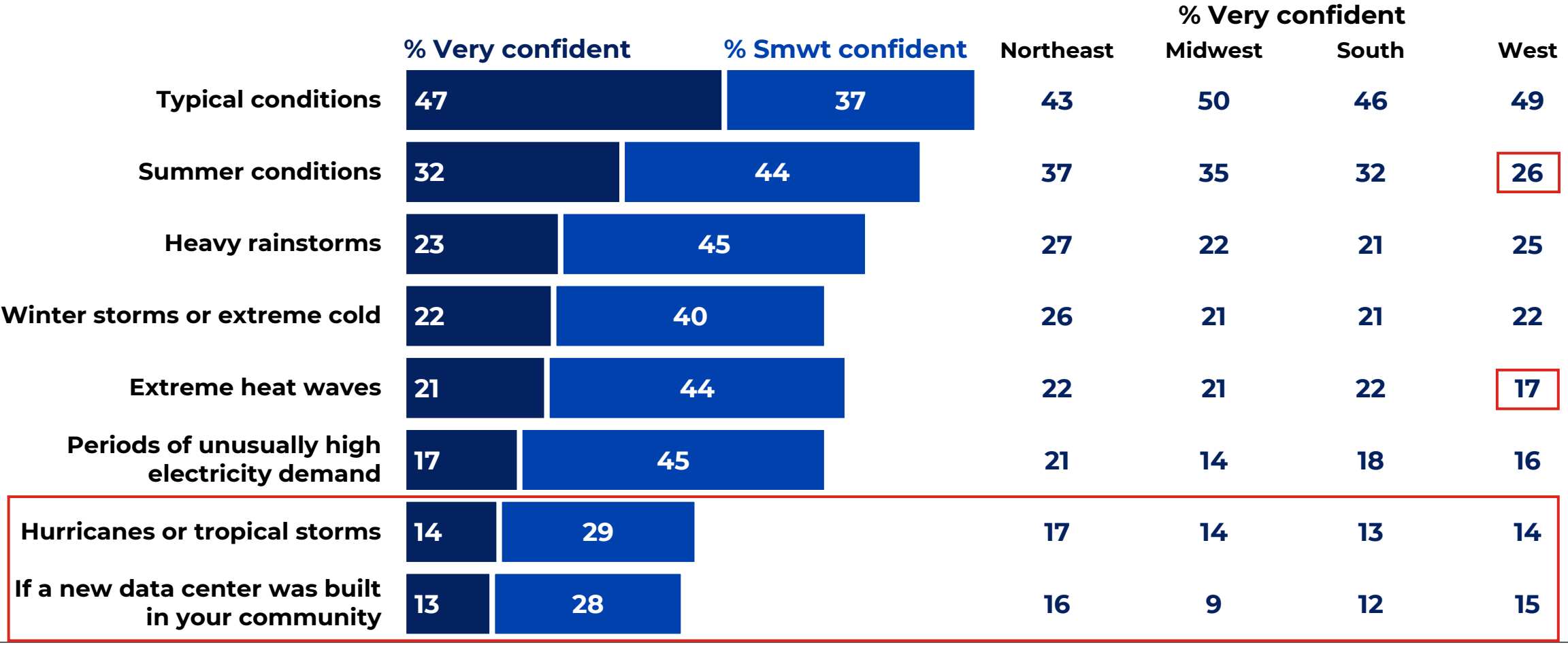
"***Power outages but mainly due to weather events. Here in Texas we had a big power outage because of a massive snow event a few years ago and we were with no power for almost a week*** *which created a lot of problems for my family since we didn't have heat, water and electricity.*"
*– Hispanic man, Southwest, 55*



*Source: GSG Discussion Board (Likely Voters, May 2026)*

# Residents 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?



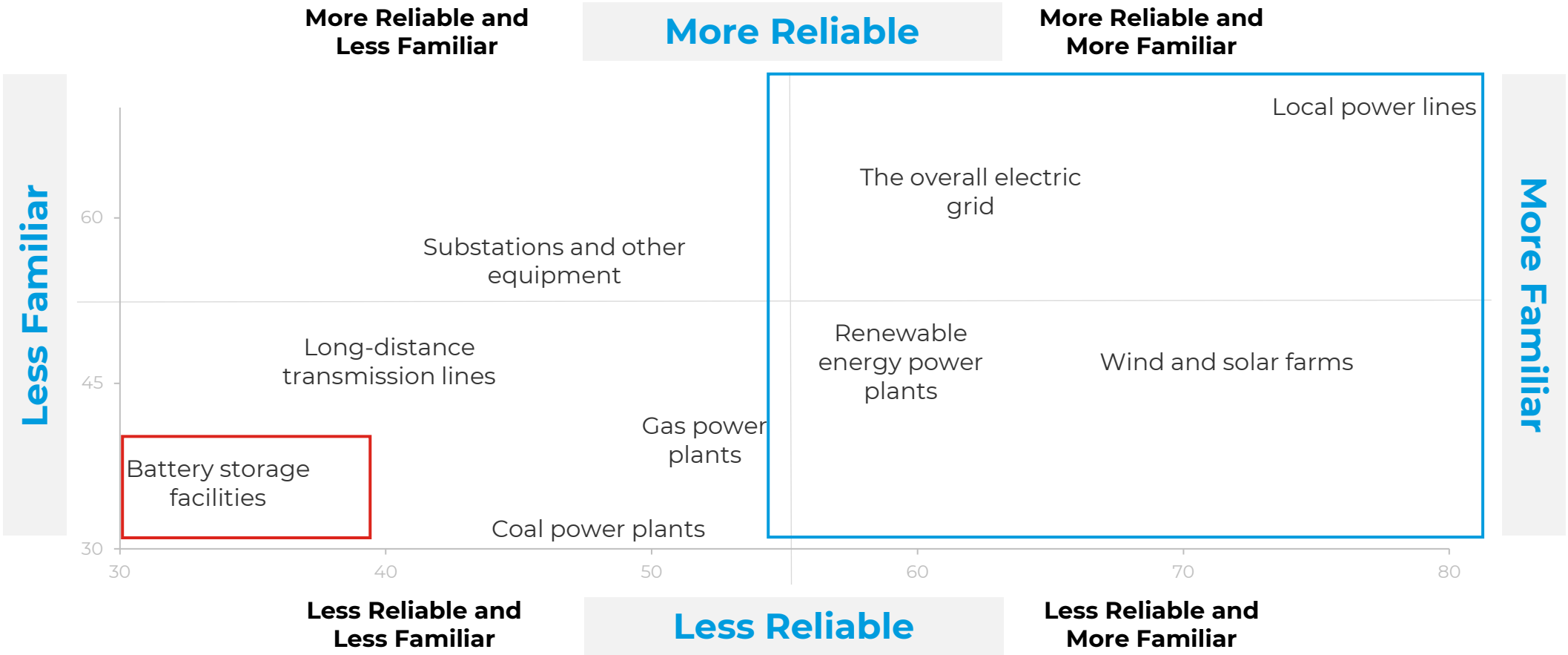





*Source: GSG Survey (Registered Voters, June 2026)*

# Local power lines are best-known and seen as the most reliable part of the 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







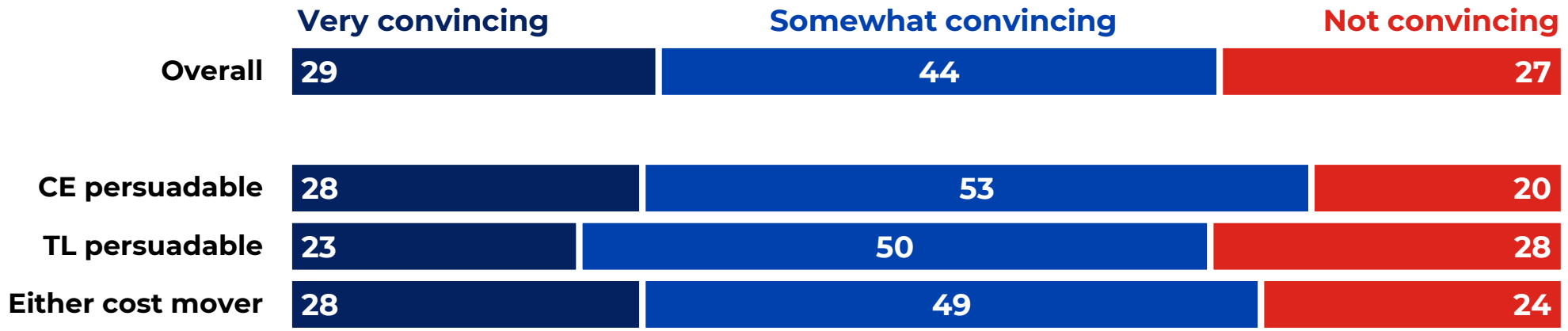

*Source: GSG Survey (Registered Voters, June 2026)*

# Residents are concerned wind and solar don't produce energy all the time and are not dependable

Highlighter Exercise – Anti-Agenda, Reliability

The **biggest concern** here is **reliability.** **Wind** and **solar sound great,** but they **don't produce energy all the time,** and that's a real challenge when demand is high or during extreme weather. Even if we build more transmission, that doesn't help if the energy isn't being generated in the first place. Until storage technology is fully ready at scale, leaning too heavily on **green energy** could make the **grid less stable** -whereas **coal** and **gas power plants** are **always reliable,** always **cheap,** and they're our long-term trusted technology for powering our country. We need to make sure we're **prioritizing consistent, dependable power** like coal and natural gas, and not counting on unreliable, unproven technologies like wind and solar.

How convincing do you find this statement?

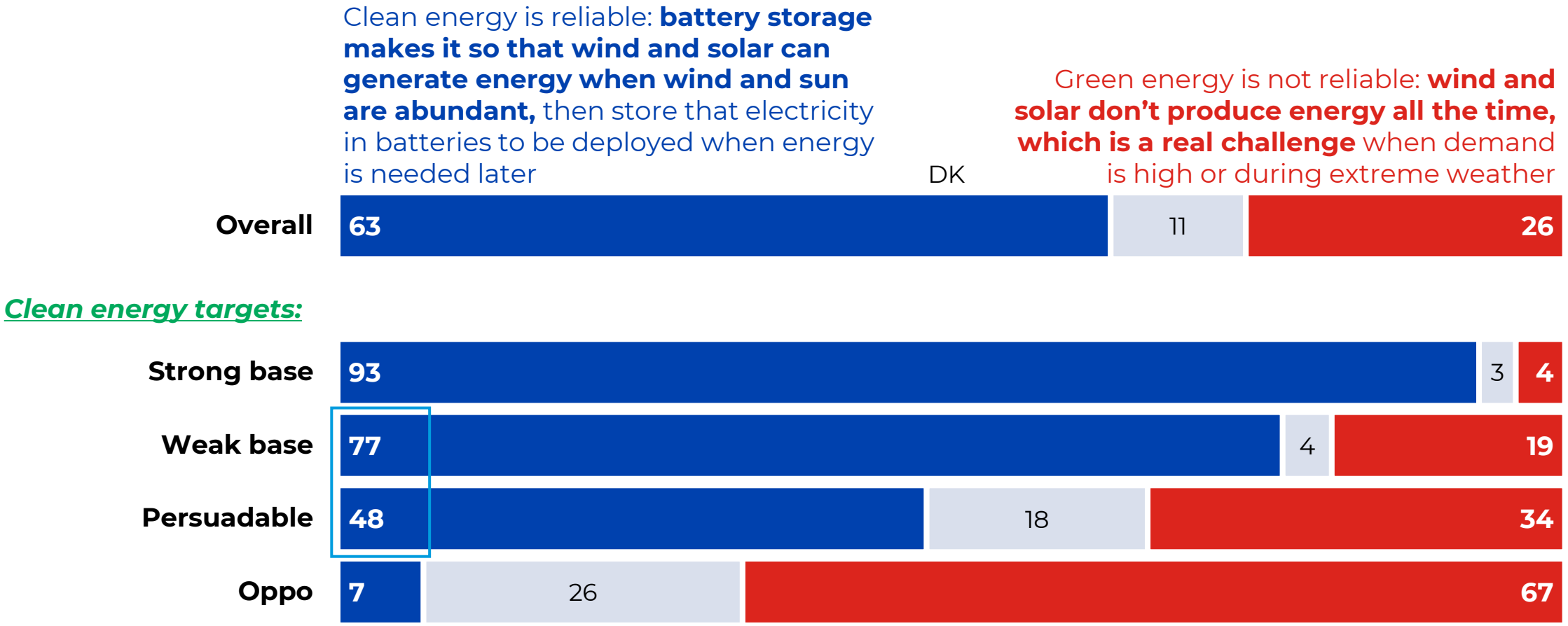



*"Clean energy persuadable" are those who do not always support expanding clean energy with battery storage, but do at least once in this survey. "Transmission line persuadable" are the same, but on building new/upgrading old transmission lines. *"Cost movers" become less supportive of either clean energy or transmission line investments after reading the $50 billon price tag, or become less supportive of both.*

*ource: GSG Survey (Registered Voters, June 2026)*

# On the clean energy reliability debate, battery storage *can* be helpful once explained

Which statement do you agree with more?



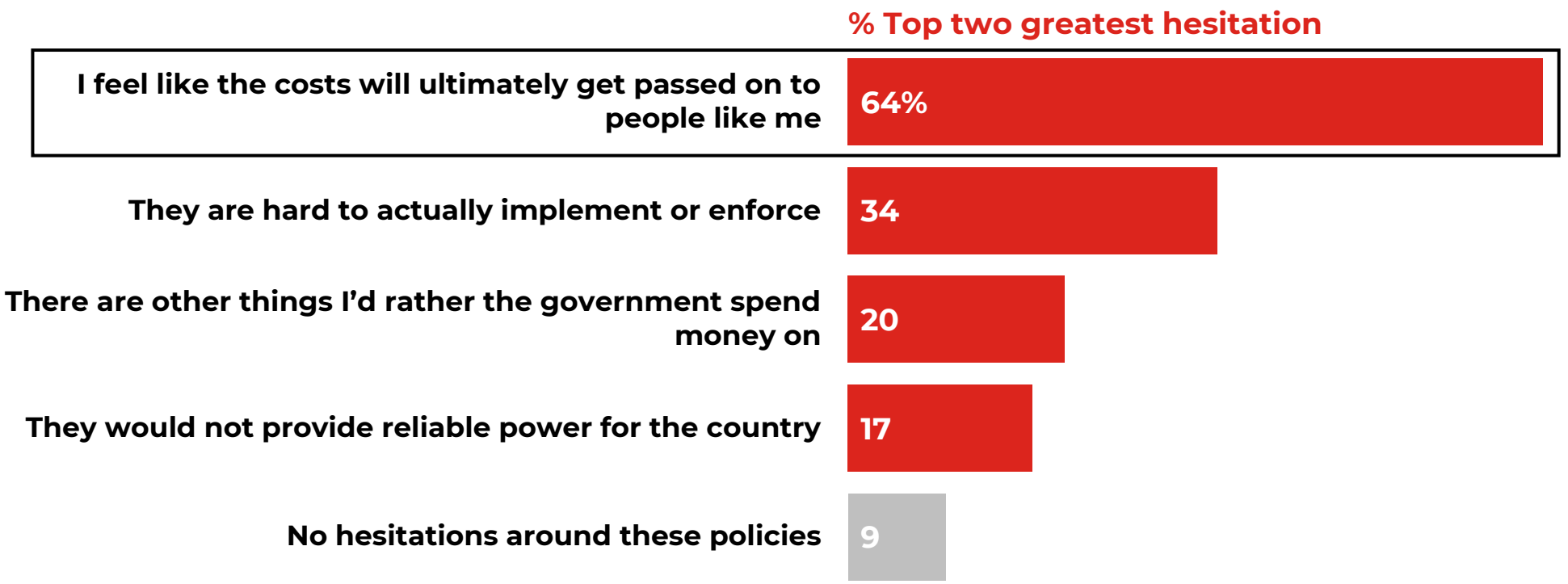



Source: GSG Survey (Registered Voters, June 2026)

# Cost Findings & Implications for Messaging the Clean Energy Agenda

# Passthrough costs dominate residents' hesitations around energy investments

Greatest Hesitations Around Full Policy Agenda*




*Source: GSG Survey (Registered Voters, June 2026)*

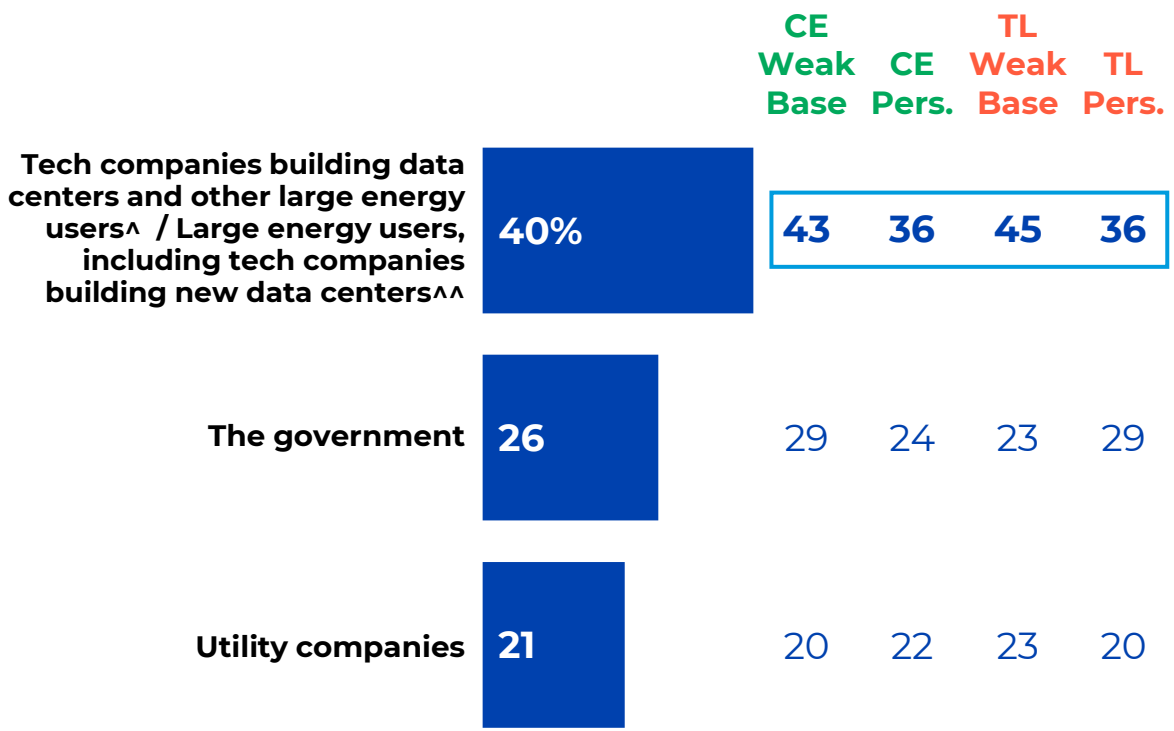




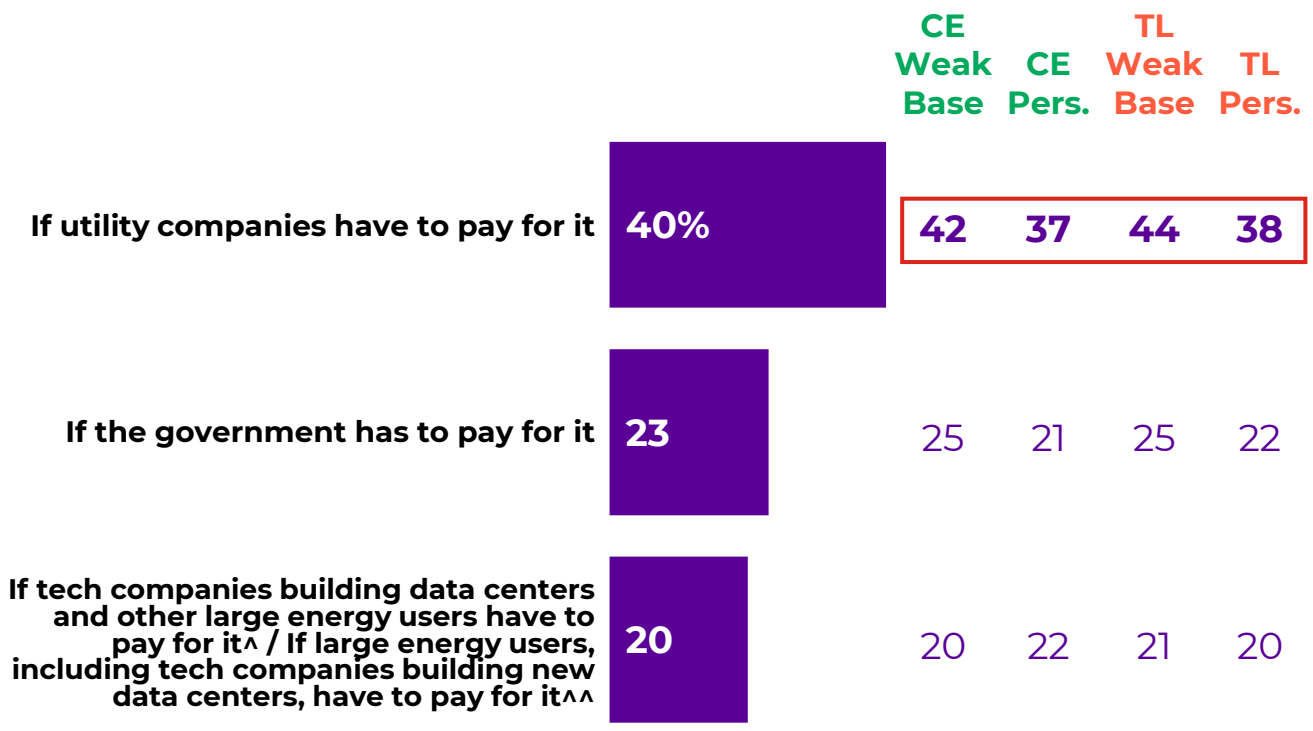
**Hesitations were asked after respondents heard a suite of policy solutions, including upgrading and modernizing the electric grid, building more power plants, and creating a tax credit for the companies that build new transmission lines*

# Residents want tech companies to pay for expanding clean energy and upgrading transmission systems – 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?




*Source: GSG Survey (Registered Voters, June 2026)*

*^/^^ designates split item*



**Policies asked here were "building more clean energy, including wind and solar, as well as battery storage" and "building new transmission lines and upgrading old transmission lines."*

# There is a pervasive fear that utility companies are so greedy that even if they are forced to pay, they will find a way to pass it onto ratepayers, while continuing to grow their profits and raising bonuses for CEOs

*"I am sure there would be more increase in utility costs. **We consumers always bear the burden of having to pay whether it's affordable or not.**"*

*– Black woman, Southeast, 69*

*"Upgrades to the network definitely increase costs to the consumer...**I'm 73 years old and have owned a home for 50 years. Never has a utility asked for a decrease that I'm aware of. I expect costs to continue to increase.**"*

*– White man, Southeast, 73*

*"Of course, there is a connection between the upgrades and expansions to my pocketbook...**The utility companies will always push most of the cost for upgrades on to the customers. That's just the way it's always been and always will be.**"*

*– Black man, Southeast, 65*

*"If the consumer is going to end up paying for this as a subsidy to the utility company, **we are either going to pay for it indirectly via higher state and federal income/sales tax, or through higher utility costs.** Our utility costs are rising now as a result of this movement to alternative energy sources that are being rolled out by the utility companies."*

*– White man, Midwest, 65*

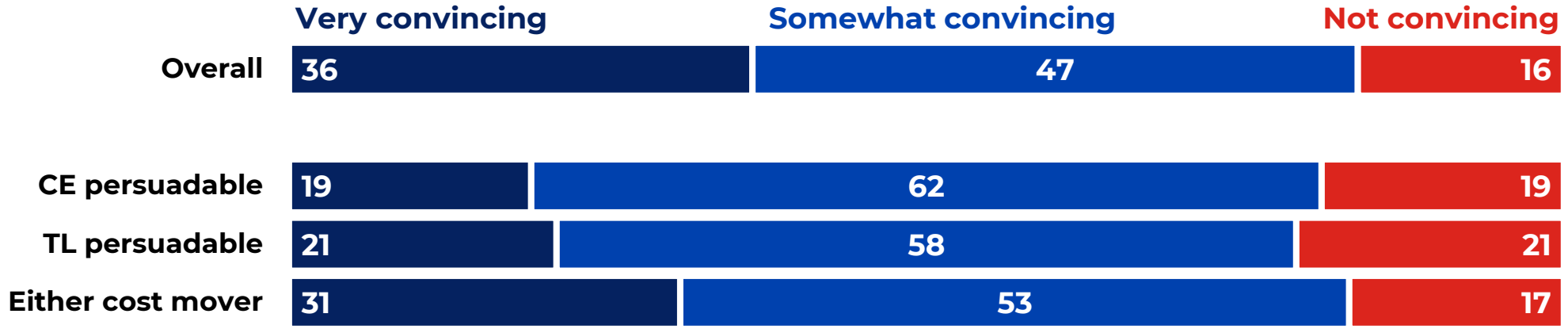
**To be talked out of this, residents need proof that utility companies will not raise rates.**

# 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.** 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.**

How convincing do you find this statement?





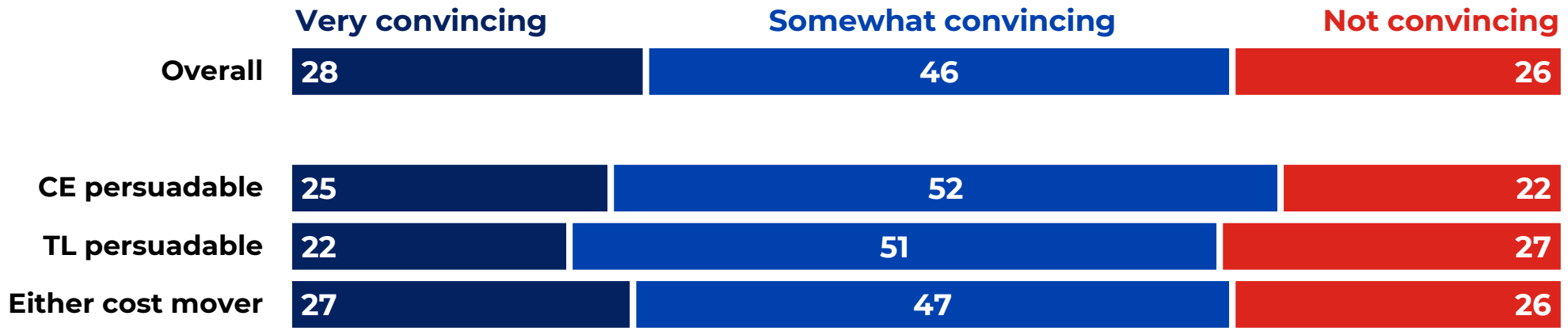

Source: GSG Survey (Registered Voters, June 2026)

# 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?

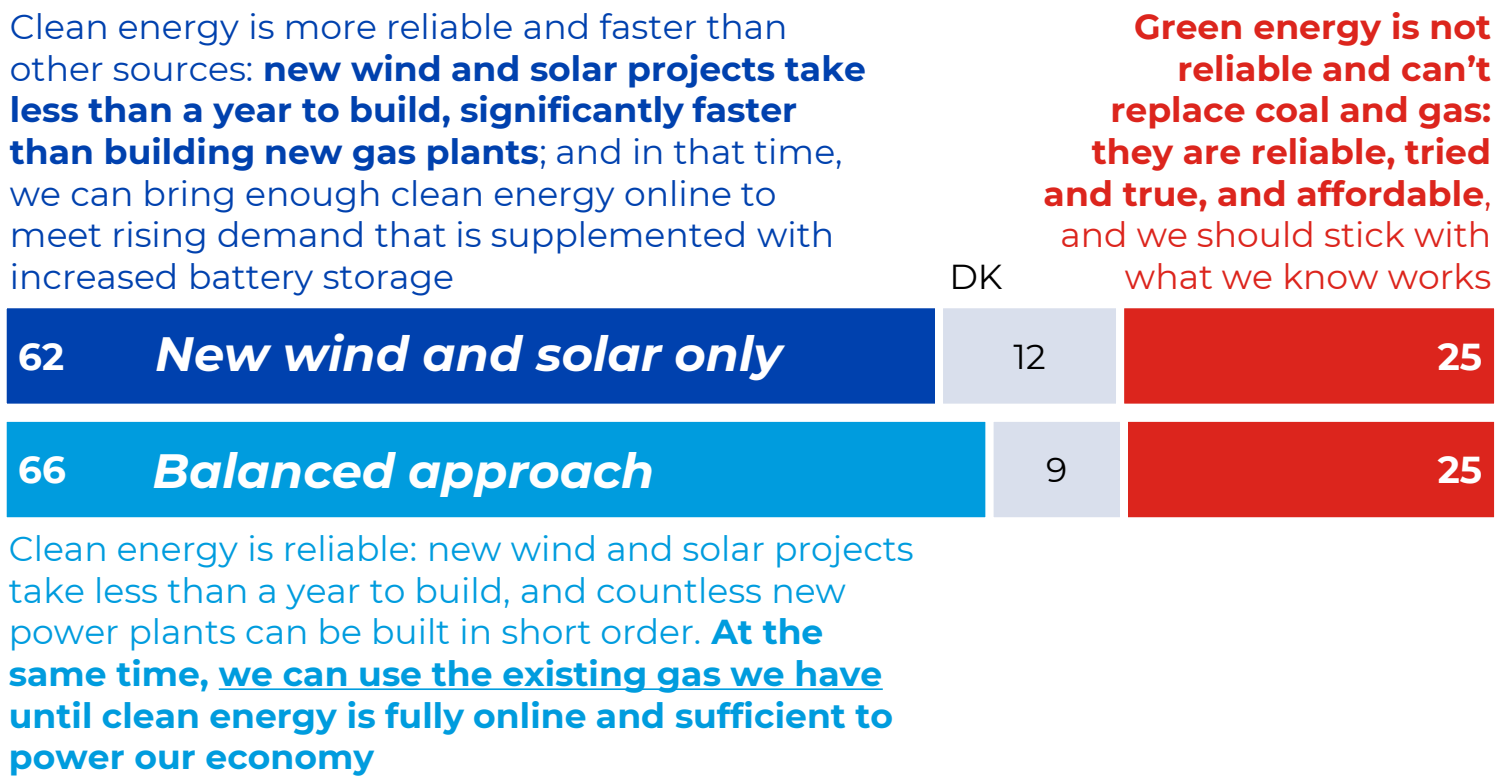





Source: GSG Survey (Registered Voters, June 2026)

# There are signs that acknowledging a balanced approach can be modestly helpful with persuadables, though it's not a silver bullet. Importantly, it doesn't backfire with clean energy supporters

Which statement do you agree with more?



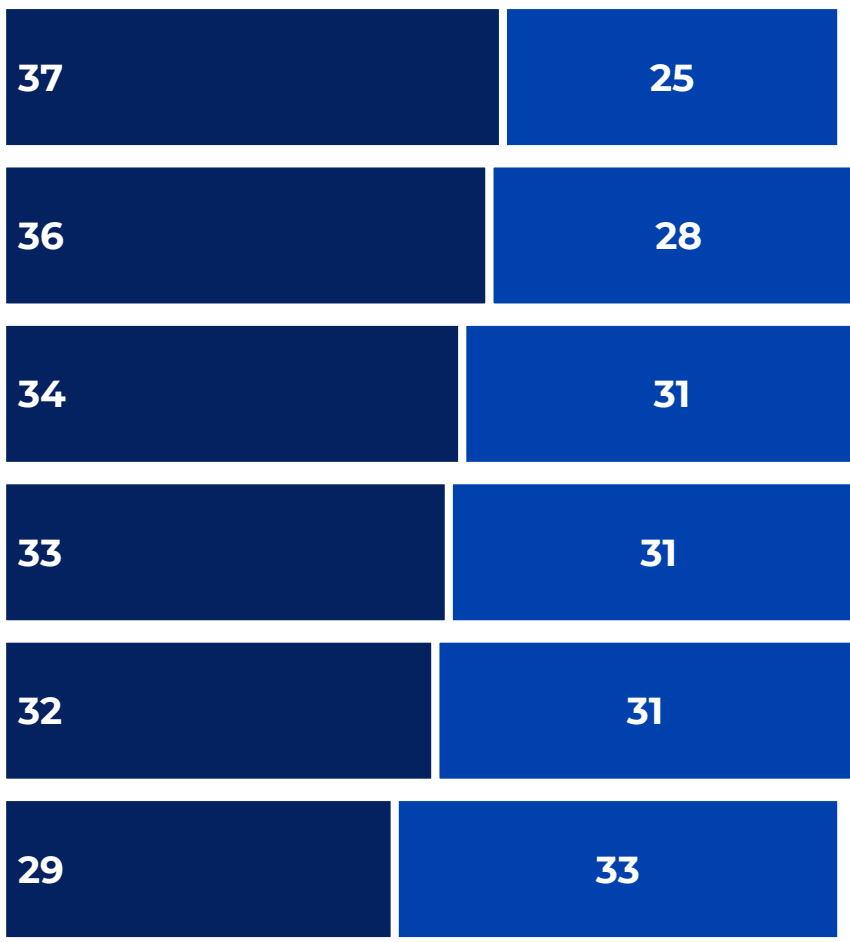

| | Net Reliable | | | | | |
|---|---|---|---|---|---|---|
| | | Clean Energy Targets | | | | Either |
| | Overall | Strong Base | Weak Base | Pers-uadable | Oppo | Cost Mover |
| New wind and solar only | +37 | +92 | +61 | +11 | -71 | +33 |
| Balanced approach | +41 | +91 | +65 | +20 | -62 | +37 |

*Source: GSG Survey (Registered Voters, June 2026)*

June Data

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

Likelihood of Supporting Agenda with Safeguards




| | % Much more likely | | | |
|---|---|---|---|---|
| | % Much more likely | % Smwt more likely | CE Persuadable | TL Persuadable | Cost Movers* |
| Utility regulators would prohibit energy costs associated with serving new data centers from being passed on to residential customers through higher electricity bills. | 37 | 25 | 23 | 25 | 35 |
| If energy projects fail to deliver promised cost savings or reliability improvements, utility companies would be required to provide refunds or bill credits to customers. | 36 | 28 | 23 | 25 | 35 |
| There would be independent audits to verify that energy projects deliver promised benefits and savings. | 34 | 31 | 20 | 20 | 31 |
| There would be a cap on annual electricity rate increases while major energy infrastructure projects are underway. | 33 | 31 | 21 | 22 | 30 |
| Utility companies would be required to build the lowest cost, most efficient new energy generation. | 32 | 31 | 20 | 23 | 30 |
| Before major energy projects are approved, independent experts would verify that the projected savings and reliability benefits outweigh the costs. | 29 | 33 | 19 | 19 | 25 |

*Source: GSG Survey (Registered Voters, June 2026)*

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 Pers. | TL Weak Base | TL Pers. | 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 |

*Source: GSG Survey (Registered Voters, June 2026)*

**[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.

# Conclusions & Recommendations

# Conclusions and Recommendations

**Everything has to come back to costs. Cost is not simply another issue: it is the lens through which residents evaluate every energy policy, every investment, and every tradeoff. Every argument should ultimately answer one question: "How does this affect my utility bill?"** While investing in clean energy and grid reliability is broadly popular, there are very real concerns about passthrough costs. Every pro-agenda message should reinforce that these investments will 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. Residents 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 residents assume will simply pass them on to ratepayers.

# Conclusions and Recommendations

**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.
- 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.

**Reliability arguments require education.** While clean energy is popular, there are signs that residents continue to hold some more logistical concerns about its reliability – mainly, that wind and solar struggle to produce energy when it isn't windy or sunny. Explaining how battery storage captures excess energy and delivers it when demand is high is compelling as a solution to this dilemma. The challenge is helping residents understand the technology rather than persuading them to like it.

GSG FOR AMERICA IS ALL IN, AUGUST 2026

# Thank You



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# 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 governors

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