

Reading the Room

Using Public Opinion Data to Shape
Energy and Grid Messaging

SEPTEMBER 29 | 1:00PM ET



Introduction

Kristen Soares



State Climate Policy
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State Climate Policy Network



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We specialize in state climate policy design and analysis.
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- **Connections** to other actors working on similar issues

Reading the Room: Using Public Opinion Data to Shape Energy and Grid Messaging



Cole Howard
Deputy Director of Policy
Conservative Energy Network



Raquel Pichardo
*Managing Partner,
Co-Founder*
The Groundwire Group

Agenda

1. Research Spotlight: 2026 Poll on Economic, Energy, and Grid Infrastructure Messaging
2. Energy Affordability Messaging Toolkit
3. Q&A

Speaker

Cole Howard



Deputy Director of Policy
Conservative Energy Network

What Voters Are Telling Us About Energy

Affordability, Grid Modernization, Permitting, and Large-Load Growth

May 2026 national survey of likely general election voters



Cole Howard, Deputy Director of Policy, CEN
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September 29, 2026

Key Message

Voters want more power and a stronger grid, but affordability and who pays are the tests every energy policy must pass.

Five numbers to remember

82%

concerned about
electricity affordability

92%

say grid modernization
is important

78%

support transmission
investment with
long-term savings

83%

support power-plan
requirements for large
users

73%

support faster
transmission permitting
with landowner rights

This is not a “build vs. don’t build” electorate. It is a “show me the value, protect the consumer, and build responsibly” electorate.

Voters want the grid modernized – but fear the bill

92%

grid modernization
important

73% very/extremely important

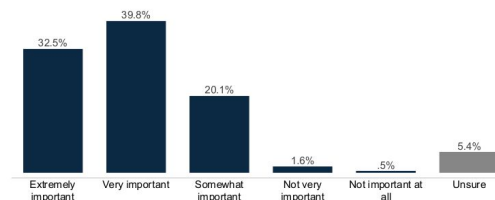
50%

think upgrades will raise
bills

Only 33% expect lower bills

The persuasion gap is not whether the grid matters. It is whether investment produces visible consumer value.

Grid Modernization Importance



	Overall	F 55+	F 55+	F 55+	M 55+	M 55+	M 55+	M 55+	F 55+	F 55+	Resident	Independent	Democrat	White	Hispanic	Other Race	Rural	Small town	Suburban	Urban	Grid Exp. Update	Trans 24	Home 24	0-1 of 4	2 of 4	3 of 4	4 of 4
Important Total	92%	89%	92%	92%	96%	93%	89%	93%	92%	93%	94%	93%	90%	92%	92%	87%	95%	96%	71%	92%	94%	93%	89%	91%	94%		
Not important Total	2%	3%	2%	3%	1%	3%	3%	2%	2%	2%	2%	3%	2%	2%	2%	3%	2%	1%	2%	3%	2%	1%	4%	3%	1%		
Extremely important	32%	29%	29%	32%	41%	31%	32%	30%	28%	30%	32%	36%	31%	30%	42%	33%	28%	33%	37%	16%	31%	35%	31%	32%	36%	31%	
Very important	40%	38%	44%	38%	36%	40%	40%	43%	38%	41%	42%	40%	42%	38%	35%	41%	43%	37%	34%	37%	43%	37%	30%	35%	45%		
Somewhat important	20%	22%	19%	22%	18%	18%	22%	20%	21%	24%	20%	17%	21%	19%	13%	23%	18%	19%	22%	22%	23%	16%	25%	27%	20%	18%	
Not very important	2%	2%	1%	2%	1%	2%	2%	1%	2%	1%	1%	1%	3%	1%	1%	3%	1%	0%	1%	2%	1%	1%	3%	3%	1%		
Not important at all	0%	1%	1%	1%	0%	1%	0%	1%	0%	1%	0%	0%	1%	1%	1%	0%	1%	1%	1%	0%	0%	0%	1%	1%	0%		
Unsure	5%	8%	6%	5%	2%	3%	4%	6%	5%	6%	5%	4%	6%	6%	5%	6%	10%	3%	3%	27%	6%	4%	6%	8%	4%		

Much of America's electricity transmission grid was built 40–60 years ago. How important do you think it is to modernize and upgrade the U.S. electricity grid?

When the value proposition is explicit, support is broad

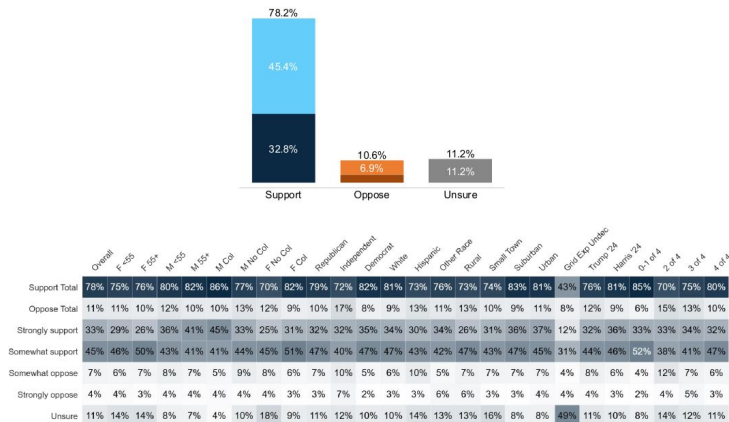
78.2%

support investing in transmission if it brings lower long-term bills and greater reliability — even with a small short-term cost.

- Republicans 79%
- Democrats 82%
- Independents 72%

The case works best when benefits and tradeoffs are stated plainly.

Grid Investment Tradeoff



Would you support or oppose investing in upgrading America's electricity transmission infrastructure if it meant lower electricity bills in the long run and greater reliability, even if there is a small short-term cost?

Permitting reform has support when guardrails are clear

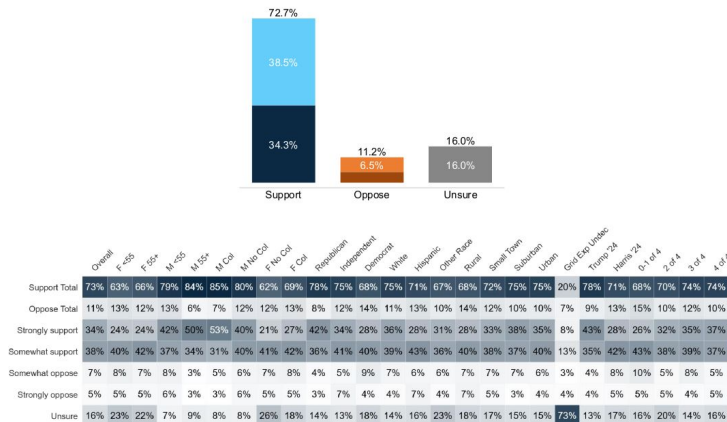
74.5%

support faster permitting for new generation when environmental and safety standards are evaluated.

72.7%

support faster federal transmission permitting so long as landowner rights are maintained.

Transmission Permitting Reform



Would you support or oppose streamlining and speeding up the federal permitting process for new energy transmission infrastructure, so long as landowner rights are maintained?

Voters also support getting more from the grid we already have

Awareness is low.

57% have never heard of technologies that can increase the capacity, efficiency, reliability, or safety of existing lines.

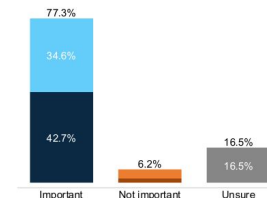
But the concept resonates.

77% say it is important to require consideration of grid-enhancing technologies before expensive new-line construction.

Grid-Enhancing Technologies Support



Grid-enhancing technologies use sensors, software, and hardware upgrades to allow existing power lines to carry more electricity without building new towers or clearing new land. Experts estimate these technologies could be deployed in months rather than years, at a fraction of the cost of new construction, to get more out of the existing grid infrastructure.



	Overall	F 55+	F 55+	F 55+	M 55+	M 55+	M 55+	M 55+	F 55+	Resident	Independent	Democrat	White	Hispanic	Other Race	Rural	Small town	Suburban	Urban	Grid Exp. Unsure	Time >24	Home >24	0-1	1-2	3-4	4-6
Important Total	77%	77%	76%	73%	84%	82%	76%	73%	80%	77%	80%	78%	80%	72%	73%	75%	79%	81%	76%	29%	77%	80%	77%	71%	76%	70%
Not important Total	6%	4%	4%	13%	5%	9%	8%	5%	2%	7%	6%	5%	6%	8%	4%	7%	6%	6%	7%	1%	7%	5%	8%	5%	6%	6%
Very important	43%	40%	51%	30%	49%	41%	38%	44%	46%	43%	38%	45%	40%	39%	40%	41%	47%	40%	14%	42%	47%	40%	35%	40%	46%	
Somewhat important	35%	37%	25%	43%	35%	41%	38%	29%	34%	34%	42%	33%	35%	32%	34%	35%	34%	36%	14%	35%	33%	37%	36%	36%	33%	
Not very important	4%	2%	3%	8%	4%	6%	6%	4%	1%	6%	3%	3%	5%	4%	2%	5%	4%	3%	5%	0%	5%	3%	6%	2%	3%	4%
Not important at all	2%	1%	1%	4%	1%	3%	2%	1%	1%	2%	3%	1%	1%	4%	1%	2%	1%	2%	3%	0%	2%	1%	2%	2%	3%	2%
Unsure	16%	20%	20%	14%	11%	9%	16%	22%	17%	16%	13%	17%	14%	20%	23%	17%	19%	14%	17%	70%	16%	15%	14%	24%	18%	15%

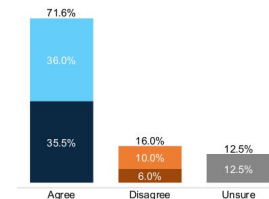
Knowing this, how important do you think it is for policymakers and regulators to require transmission line owners and operators to consider using these technologies before approving expensive new transmission line construction?

The CEN energy framework lands with voters

71.6%

agree with a framework that uses every available energy source on a level playing field, modernizes the grid, and lets competition drive costs down.

Master CEN Narrative



	Overall	F 45+	F 55+	M 45+	M 55+	M 65+	M No Col	F No Col	Republican	Independent	Democrat	White	Hispanic	Other Race	Rural	Small town	Suburban	Urban	28% Exp. Co-Union	Temp >24	0-1 of 4	2 of 4	3 of 4	4 of 4		
Agree Total	72%	68%	70%	71%	76%	80%	70%	67%	72%	73%	75%	71%	73%	73%	72%	69%	71%	74%	70%	74%	72%	70%	69%	74%	71%	
Disagree Total	16%	17%	13%	22%	13%	16%	18%	14%	15%	16%	14%	17%	17%	14%	8%	16%	12%	17%	21%	7%	15%	17%	20%	12%	14%	17%
Strongly agree	38%	30%	32%	38%	45%	44%	37%	29%	34%	37%	35%	35%	37%	27%	41%	30%	35%	40%	33%	8%	38%	35%	34%	32%	37%	36%
Somewhat agree	38%	37%	38%	35%	33%	35%	33%	38%	38%	35%	39%	36%	36%	46%	31%	39%	36%	34%	37%	20%	36%	37%	36%	38%	37%	35%
Somewhat disagree	10%	11%	8%	15%	7%	9%	12%	9%	9%	10%	9%	10%	11%	9%	4%	10%	7%	11%	12%	5%	9%	10%	15%	6%	10%	9%
Strongly disagree	6%	6%	5%	7%	6%	7%	6%	5%	6%	6%	7%	6%	5%	4%	5%	5%	6%	9%	2%	5%	7%	5%	6%	4%	7%	
Unsure	12%	15%	17%	7%	9%	4%	12%	18%	13%	12%	11%	12%	11%	13%	20%	16%	17%	9%	9%	65%	12%	11%	10%	19%	11%	12%

How much do you agree or disagree with the following statement: "The best energy policy for America uses every available energy source, for example nuclear, natural gas, solar, wind, etc., on a level playing field, modernizes the electricity grid to move power efficiently, and lets competition drive costs down for families and businesses."

What this means:

1

Lead with affordability and consumer value

Explain what investments deliver, when benefits arrive, and who bears the cost.

2

Pair more generation with a stronger grid

Voters intuitively understand supply; connect transmission to reliability, efficiency, and access to lower-cost power.

3

Make large-load accountability part of the growth story

Support economic growth while protecting existing customers from inappropriate cost shifts.

4

Frame faster permitting with clear protections

Landowner rights and environmental/safety safeguards materially strengthen support.

A simple message architecture

AFFORDABILITY

Keep costs down for families
and businesses

RELIABILITY

Build enough generation and
move power where it is
needed

ACCOUNTABILITY

Grow faster without shifting
unfair costs to existing
customers



**Build more. Build smarter. Build faster.
Consumer value has to be at the center.**

Questions / discussion

Thank You

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Speaker

Raquel Pichardo



Managing Partner and Co-Founder

The Groundwire Group

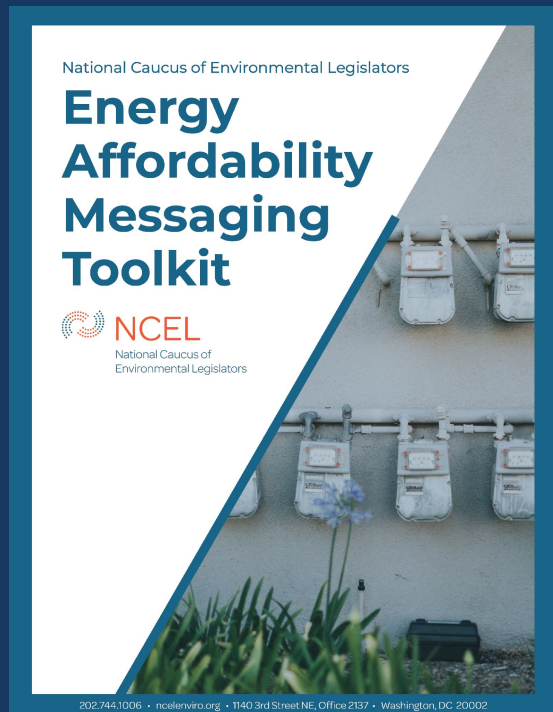


Energy Affordability Messaging Toolkit

September 29, 2026

*Raquel Pichardo
Co-Founder, Managing Partner
The Groundwire Group*

The Energy Affordability Messaging Toolkit



Three Messaging Categories:

- 1 **Delivering Near-term Relief**
- 2 **Protecting Customers and Reforming the System**
- 3 **Building a Low-cost Clean Energy Future**

Affordability Today

+31.9%

Increase in national average electricity
bill from June 2021 to June 2026

[Source](#)

Lexington residents see electric bills spike as summer usage climbs

Published: Sep. 16, 2026 at 5:52 PM EDT | Updated: Sep. 16, 2026 at 11:00 PM EDT



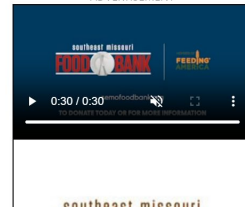
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In Oklahoma, poor families often have to live in the dark

By : Julie Z. Weil / The Washington Post // June 22, 2026 // 9 Minute Read



r/MiddleClassFinance • 20d ago
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Our electric bill is getting harder to budget for

I was looking at our budget and the electric bill is the one that keeps standing out. It used to be pretty predictable, but now I feel like I need to plan for it being higher every month.

What Polling Tells Us

80%

of Americans feel powerless over their utility charges

[Source](#)

73%

believe building more clean energy will cut costs

[Source](#)

64%

say the desire for utilities to make more money is a major reason for bill increases

[Source](#)

78%

are concerned new data centers will raise their bills

[Source](#)

40%

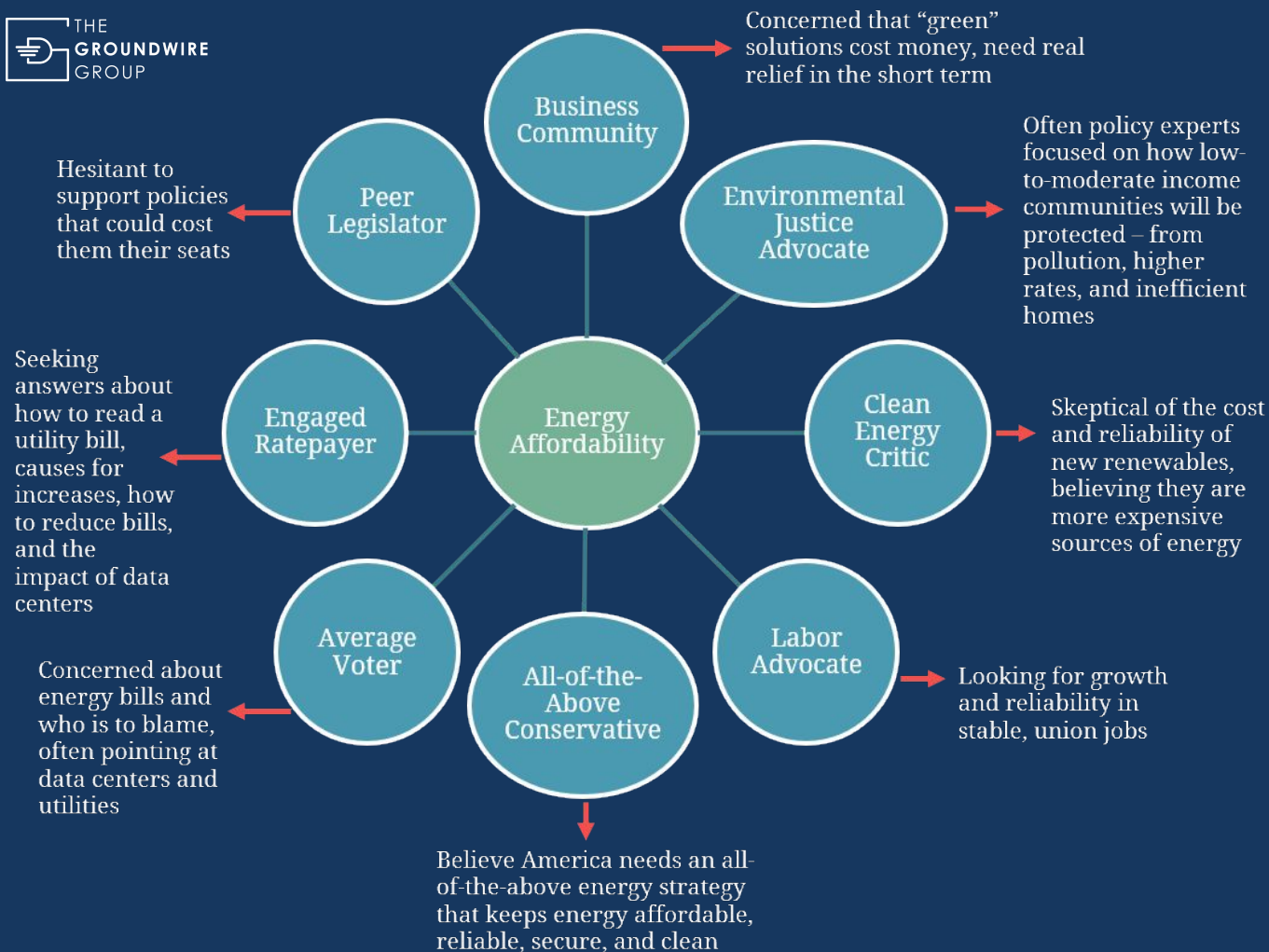
believe energy costs are going up because of grid updates

[Source](#)

42%

understand what drives the costs they are charged by their electric utility

[Source](#)



Understanding the Audience

THE FRAMEWORK

Messaging Deep Dive: Improving Planning to Make Best Use of Ratepayer Revenue

The challenge

America's electrical grid is decades old and urgently needs rebuilding to meet growing demand and extreme weather impacts. While there is some base-level public awareness of the issues facing the grid, there is still a public awareness gap regarding the scope of the problem.

Clean Grid: In nearly every state, a majority of voters support the government moving the country to a 100% clean electricity grid by 2035.

Source

The Message:

THE GRID THAT EXISTS TODAY ISN'T UP TO THE CHALLENGES IT WILL FACE TOMORROW. TO ENSURE AFFORDABLE AND RELIABLE ENERGY FOR EVERYONE, INVESTMENTS CAN BE MADE TO UPGRADE AND EXPAND THE GRID. DECISIONS MADE NOW WILL DICTATE HOW THOSE INVESTMENTS ARE MADE IN THE YEARS TO COME — AND WHO REAPS THE BENEFITS.

Question from Constituent:

Q: How does investing in the grid make bills cheaper?

“Investing in the grid” can mean many different things. We can take steps to make it easier to get power from where it is generated to where it is needed. This can help homes and businesses access abundant, lower-cost electricity instead of competing for scarcer, more expensive power.

This can mean investing in larger solutions, rather than constant “band-aids” that cost more in the long run. We can build large transmission lines that connect one region with extra electricity to another that needs it. We can deploy new technologies to upgrade existing lines, reducing “traffic jams” and energy waste in the process. We can also prepare the grid to better integrate community-based power, like rooftop or community solar.

Messaging Deep Dive: Removing Deployment Barriers for Utility-Scale Clean Energy

The challenge

Despite clean energy often being the lowest-cost option, new projects face delays due to permitting bottlenecks, years-long wait times to connect to the grid, and local opposition. The challenge and opportunity for legislators is to deliver consistent and transparent processes for how clean energy projects will be built in their state.

69%

of voters say they would be proud of renewable energy development in their communities

Source

The Message: Removing Deployment Barriers for Utility-Scale Clean Energy

BUILDING CLEAN ENERGY PROJECTS QUICKLY AND AFFORDABLY MEANS CUTTING RED TAPE — BUT NOT AT THE EXPENSE OF THE COMMUNITIES WHERE THESE PROJECTS WILL BE LOCATED. WE CAN UPDATE AND REFORM THE WAY CLEAN ENERGY PROJECTS ARE PLANNED AND BUILT TO SPEED THE TRANSITION TO A LOW-COST, CLEAN ENERGY SYSTEM OF THE FUTURE.

Strengthening Utility Regulation

The challenge

Electricity bills are on the rise, and while most people blame the utility, they feel powerless to do anything about it.

64%

say the desire for utilities to make more money is a major reason for bill increases

[Source](#)

80%

of Americans feel powerless over their utility charges

[Source](#)

42%

understand what drives the costs they are charged by their electric utility

[Source](#)

Messaging Deep Dive: Revise Utility Profit Model

Messaging note

Legislators can start by laying out the incentive models these policies seek to address, by saying, for example: “Utilities currently have no reason to reduce customer bills, and every reason to spend more. Policies that reward utilities for keeping costs down can result in both utility and household savings.”

Questions from Constituents

Q. How will you prevent utilities from raising my rates just to make more money?

A. Right now, utilities make more money by spending more money, and you are footing the bill. This can be addressed by strengthening the rules that regulators, often PUCs, use to oversee utility rate requests. States can improve PUC funding and resourcing, cap utility profit margins at the minimum level needed to attract investors, reward utilities for cutting costs, limit guaranteed returns on investment, and provide dedicated customer advocates.

Final Takeaways

1

Meet constituents where they are:

Use what they already know or believe to be true as an opener to fruitful conversations

2

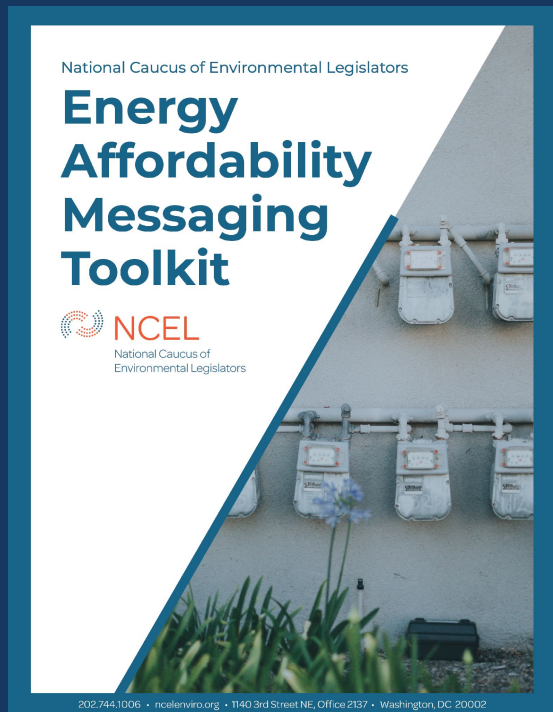
Make it local:

Understand a community's stories, values and concerns to create effective messaging

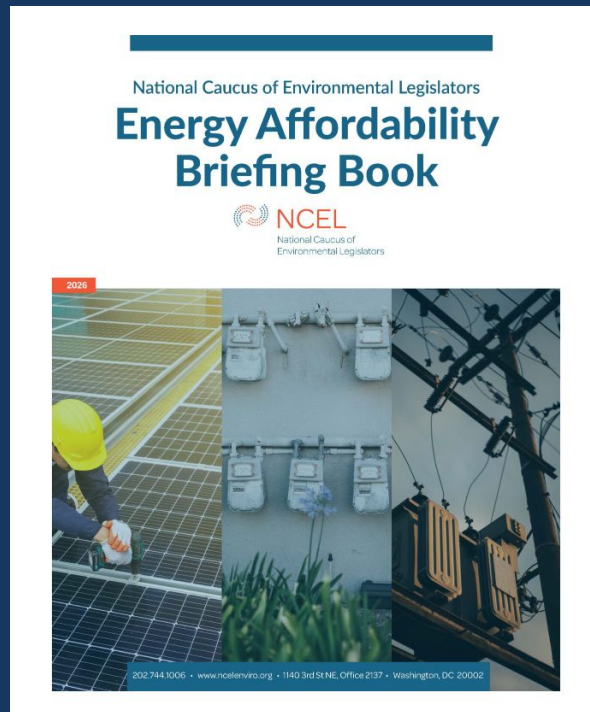
3

Offer a positive vision of the future:

Show how policies can actively make life more affordable, cleaner, or more secure for families and communities



ncelenviro.org/resources/energy-affordability-messaging-toolkit/



ncelenviro.org/resources/energy-affordability-briefing-book/

Thank you!

Raquel Pichardo

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Q&A

Thank you for joining!

**Reach out to
kristen@climate-xchange.org with any
additional questions!**

