Mercury.

Survey Findings & Political Analysis for

Independent Power Producers of NY

N = 801 Registered Voters | Statewide New York | MoE ±3.5%

Conducted by Mercury Public Affairs

Executive Summary: Utilities Bad. Competition Good.

71%

report electricity bill increased in past 12 months

68%

say utility costs are "out of control"

63%

support competitive electricity system (pre-msg)

65%

support competitive system (post-messaging)

Every utility tested is net-negative

ConEd -7 pts
National Grid -30 pts
NYSEG -22 pts
Central Hudson -29 pts
RG&E -32 pts

Methodology

The survey was conducted February 23-26, among 801 likely November 2026 voters in New York State, who do not work for (and have no household member working for) an electric utility, independent power producer, the NYS Public Service Commission, or NYSERDA. The margin of error for this survey at the 95% confidence level is ±3.5% on the overall sample. The margin of error on sub-samples is greater. Values may not equal 100% due to rounding.

Key Takeaways

Cost/affordability is the dominant voter concern — 56% say it should be NYS's top electricity priority

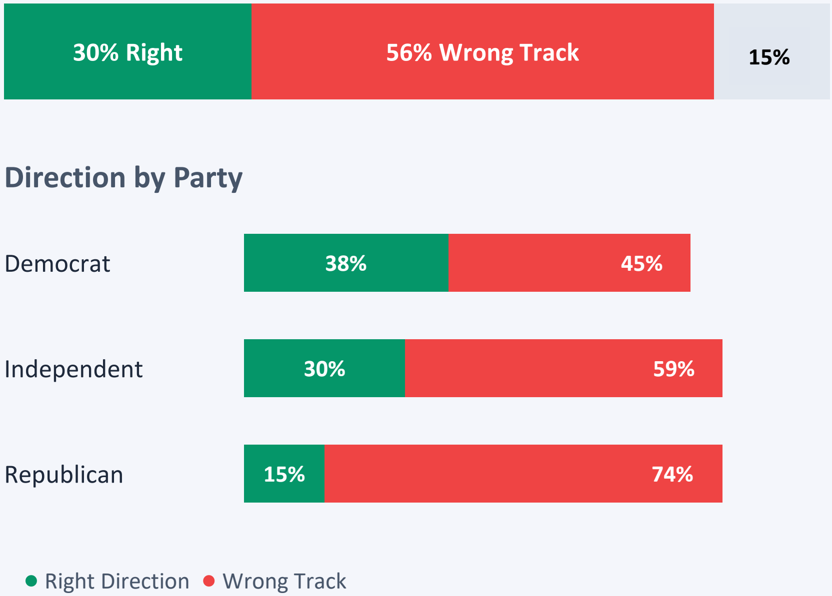
Support for competitive markets is bipartisan
— Liberal 66%, Moderate 62%, Conservative 60% agree

Natural gas enjoys broad support
— 77% more likely to support new gas if costs reduced (even 66% of liberals)

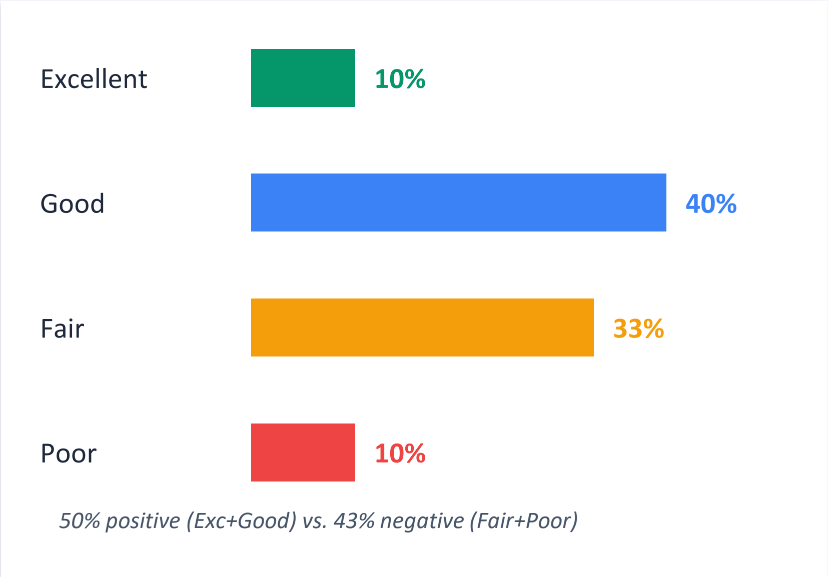
All messages tested achieve majority convincing ratings
— strongest: energy independence (67%), source diversity (65%), lower prices (65%)

Mood of the Electorate

Q4: NYS Direction



Q3: Household Financial Situation

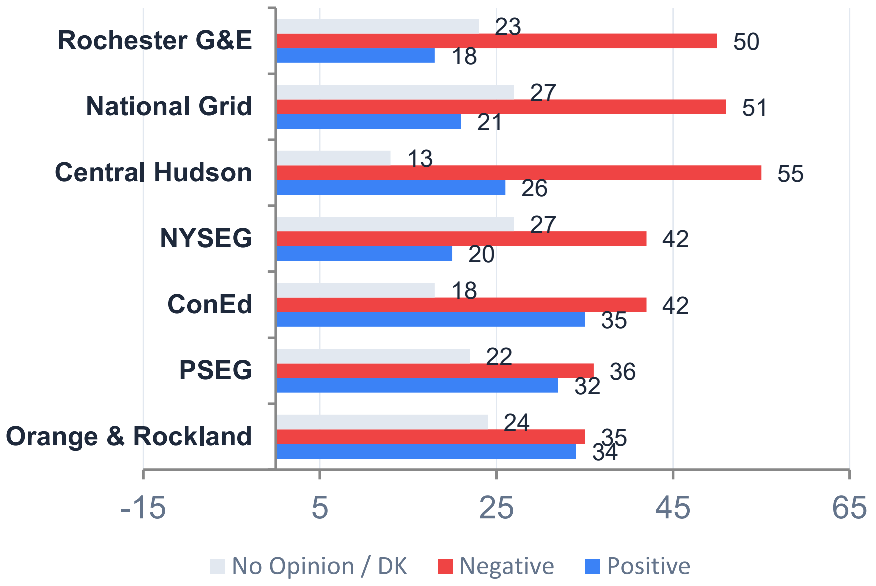


Majority negative directional sentiment (56%) and split financial outlook establish a segmented case for affordability arguments.

Energy Sources & Utilities

Individual Utility Ratings

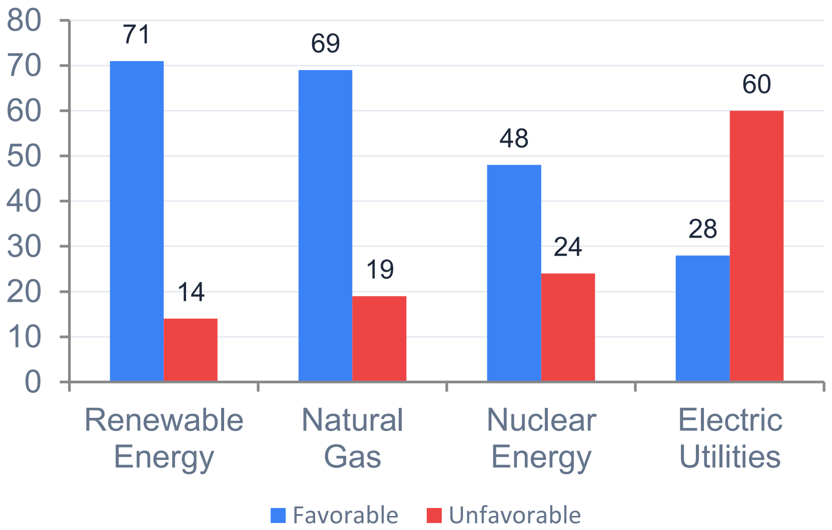
Q10-Q16: Positive vs. Negative Impressions Among Own Customers



Every utility tested is net-negative. *ConEd is the least negative (net −7), while Central Hudson (−29), National Grid (−30), and Rochester G&E (−32) face the deepest deficits. Small-sample caution applies to all utilities except ConEd (n=348).*

Energy Source Favorability

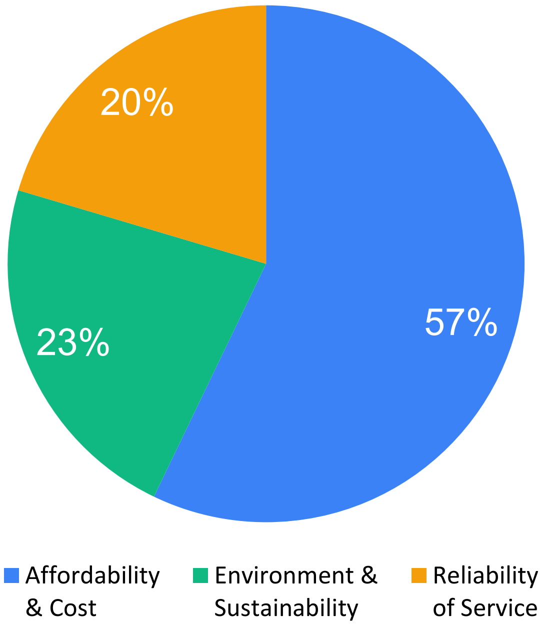
Q6-Q9

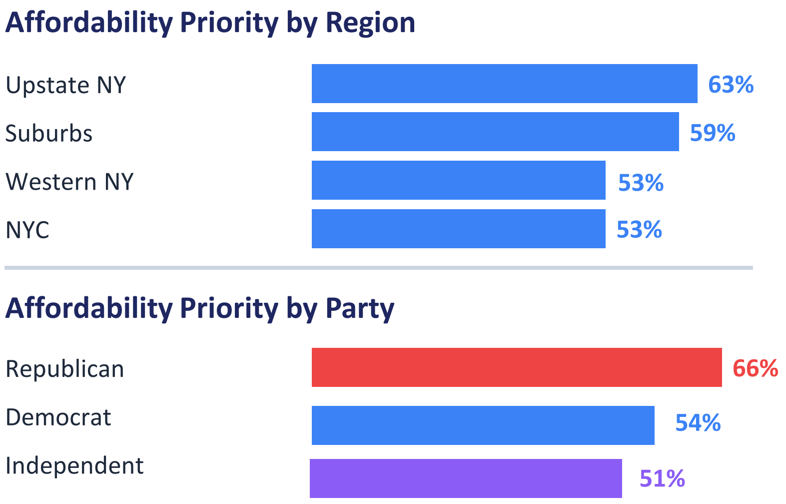


Renewable energy and natural gas both enjoy strong majority favorability. Electric utilities face deep net-negative sentiment (28% fav / 60% unfav).

Affordability

Affordability Dominates Voter Priorities





Q29: When it comes to the electricity industry, which do you believe is the most important area for NYS to focus on?
Affordability is the top priority across every region and party — a true statewide consensus.

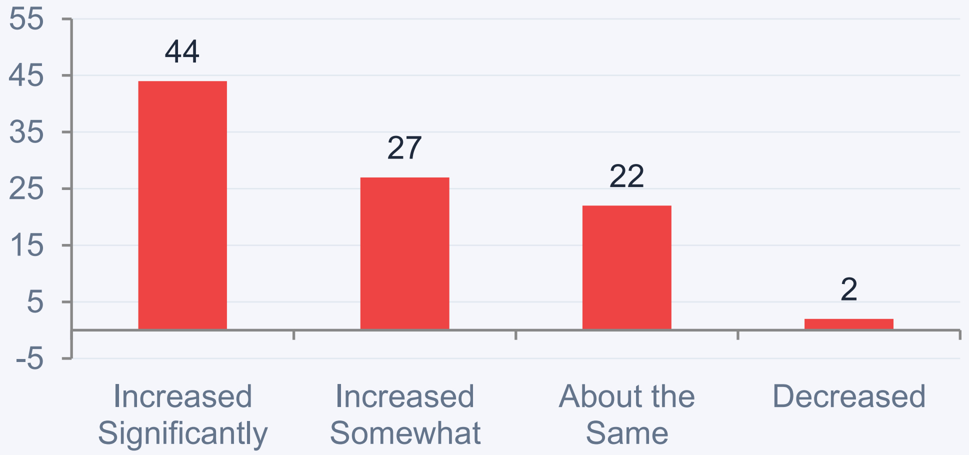
Electricity Bill Increases Are Pervasive

Q17: Thinking about the last 12 months, has your electricity bill increased, decreased, or is it about the same?

71%

report electricity bill increased in past 12 months

44% say SIGNIFICANTLY increased

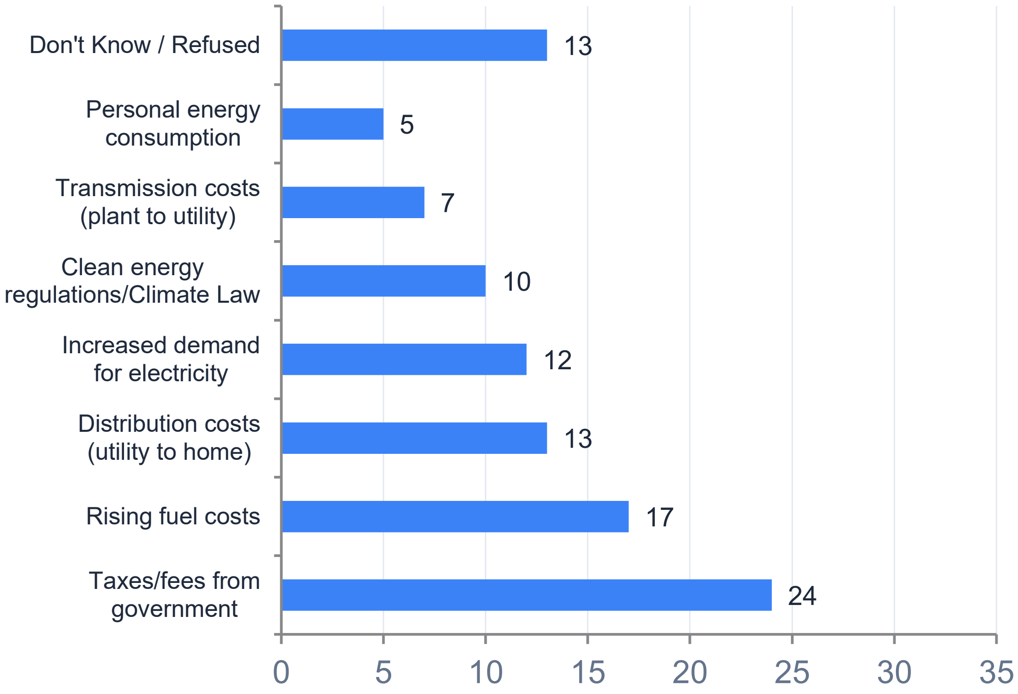


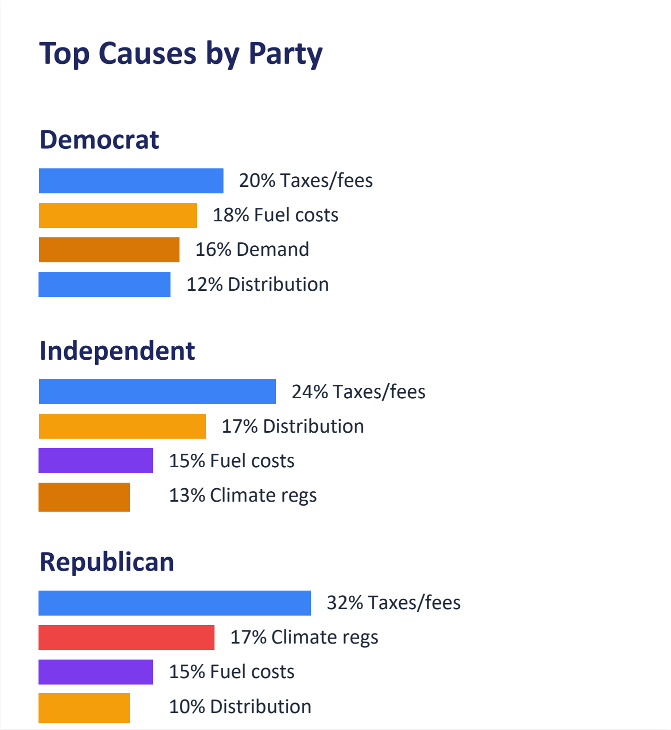
Bill Increases by Region (% Reporting Any Increase)

NYC	Suburbs	Western	Upstate
70%	68%	72%	80%

Why Have Bills Increased?

Q18: Among those reporting bill increases (n=572) | "Which do you think is the main reason?"

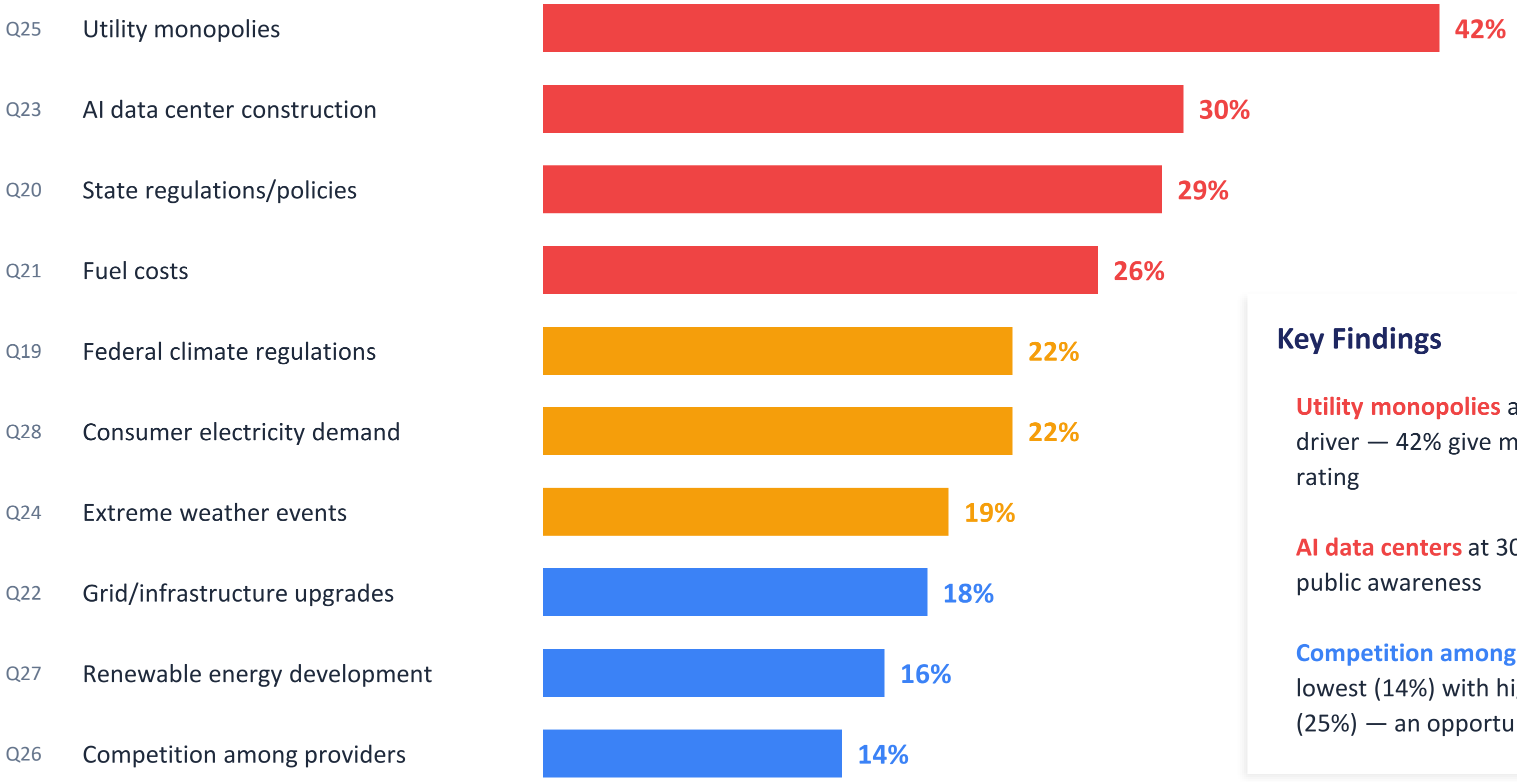




No single cause dominates — attribution is ideologically structured. Conservatives blame taxes and climate regulations; liberals cite fuel costs and demand. The 13% DK rate suggests many feel the increase but can't identify its cause.

Perceived Influence on Electricity Costs

Q19-28: "On a scale of 0 to 10, how much influence does each factor have on what you pay for electricity?"



Key Findings

Utility monopolies are the #1 rated cost driver — 42% give maximum influence rating

AI data centers at 30% show emerging public awareness

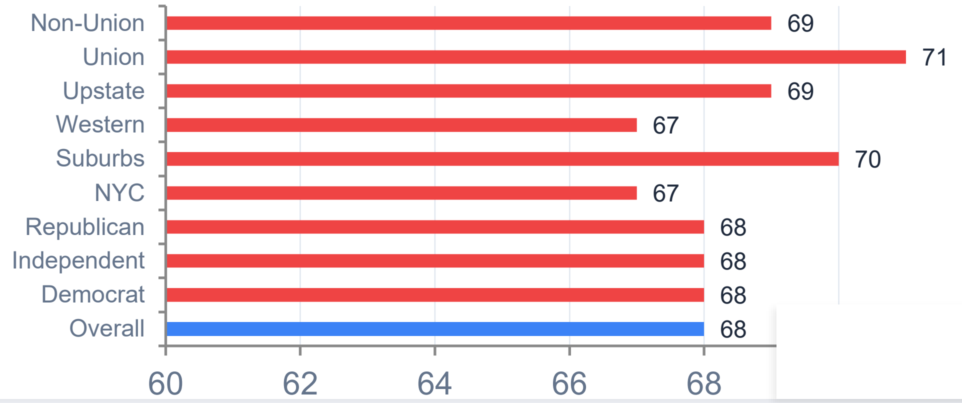
Competition among providers rates lowest (14%) with highest "no influence" (25%) — an opportunity for education

Respondents attribute cost influences broadly across many factors. The strong showing for "utility monopolies" supports competitive market messaging.

% Saying "Significant Influence" (Rating = 10)

Utility Costs: Bipartisan Frustration

Q38: "Utility costs are out of control"



68%

OVERALL
Frustration that utility costs are out of control

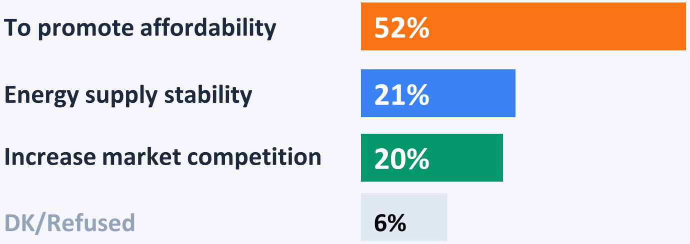
Consistent 67%–71% across ALL subgroups — no partisan, regional, or demographic variation

Q: Which statement do you agree with more: Utility companies have done a good job controlling costs and my utility bill reflects this – OR – utility costs are out of control and utilities cannot be relied upon to provide just and reasonable rates?

This is the poll's most powerful bipartisan finding. More than two-thirds of voters across every subgroup say utility costs are out of control. This provides the core emotional and factual foundation for competitive market messaging. Combined with the 71% reporting bill increases (Q17), cost frustration is the dominant sentiment in the New York energy landscape.

Bipartisan Support for a Competitive Electricity System

Q34: Main reason for supporting competitive system | Among supporters (n=502)



By Subgroup

Women: 57% cite affordability vs. men 46%
Men: cite competition more (25% vs. 17%)
NYC: 57% affordability
Upstate: 49% affordability, 27% competition

Affordability is the dominant motivator for supporting competitive markets by a wide margin (52%), consistent with Q29's finding that cost is the #1 voter priority. Women cite affordability more than men; men prioritize competition more. This reinforces "lower prices" as the core competitive market message.

63% agree NYS should continue competitive electricity system (Q33 pre-messaging)

Agreement by Region (Q33)

Agreement by Party (Q33)

79% say NYS government should prioritize increasing competition in the energy market if it could lead to more pricing options and a wider variety of energy choices for consumers (Q35). Consistent 74%–82% support across all regions; Suburban voters (86%) and Republicans (81%) lead — the survey's strongest policy consensus.

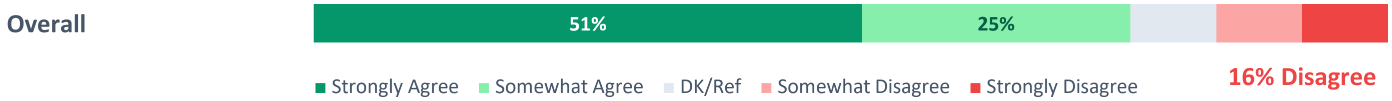
Support for New Energy Infrastructure

NYS Should Cut Bureaucracy to Speed Up Energy Infrastructure

Q36: How strongly do you agree or disagree that NYS should cut bureaucracy and streamline regulations to speed up construction of energy infrastructure projects? | N = 801

76%

agree NYS should cut bureaucracy and streamline regulations to speed up energy projects



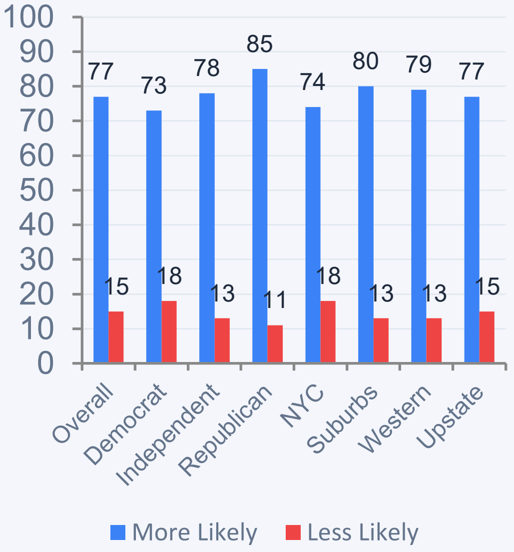
Agreement by Party (% Total Favorable)

76%	72%	81%
Democrat	Independent	Republican

Broad bipartisan supermajority supports cutting red tape for energy infrastructure. Republicans lead at 81% favorable — higher than Democrats (76%) and Independents (72%) — making this one of the few issues where GOP voters are the most enthusiastic. The 9-point partisan spread is remarkably narrow for a regulatory policy question.

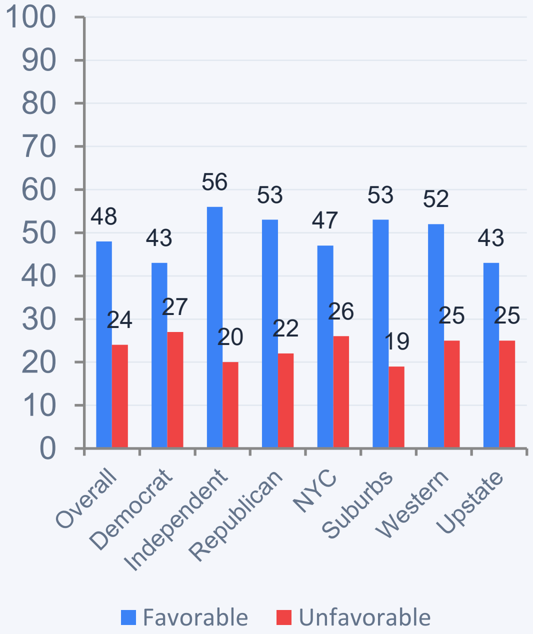
Broad Bipartisan Support Across the Spectrum

Natural Gas



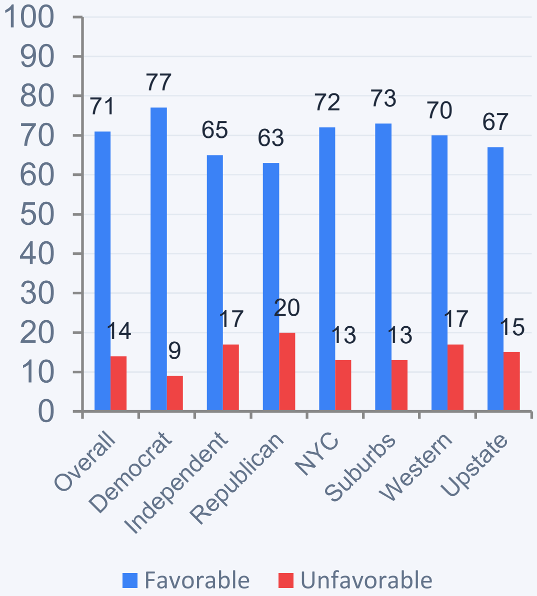
Q37: Would you be more likely or less likely to support the construction of new natural gas facilities if you knew that it would help reduce electricity costs?
Even among liberals, 66% are more likely to support — affordability framing neutralizes ideological opposition.

Nuclear Energy



Q7: Favorability toward nuclear energy. Overall, 48% view nuclear energy favorably vs. 24% unfavorably. Independents (56%) and Republicans (53%) lead, while Democrats trail at 43% — signaling an opportunity to build broader partisan support.

Renewable Energy

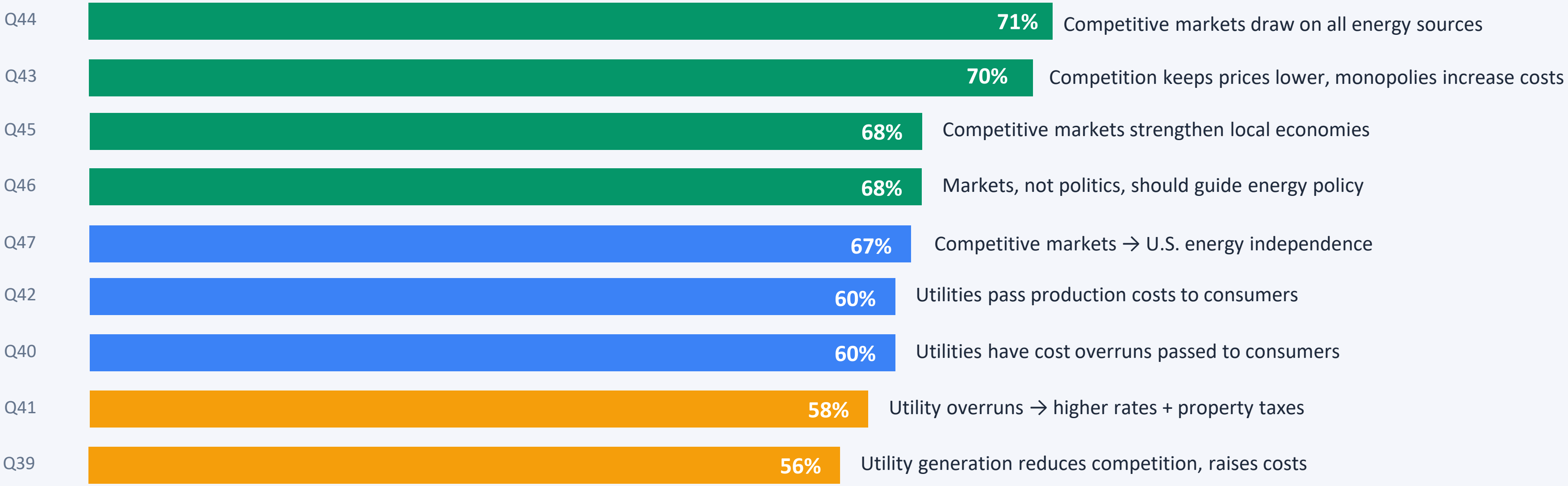


Q9: Favorability toward renewable energy. Overall, 71% view renewable energy favorably vs. 14% unfavorably. Democrats lead at 77%, but Independents (65%) and Republicans (63%) also show strong majority support — the broadest cross-party consensus in the survey.

Message Testing

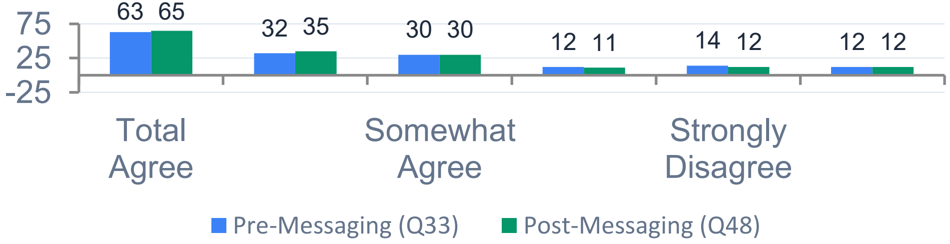
Message Testing: Ranked by Effectiveness

All nine messages achieve majority "convincing" ratings. Strongest themes: energy independence, source diversity, and cost reduction.



Messaging Impact: Pre vs. Post Agreement

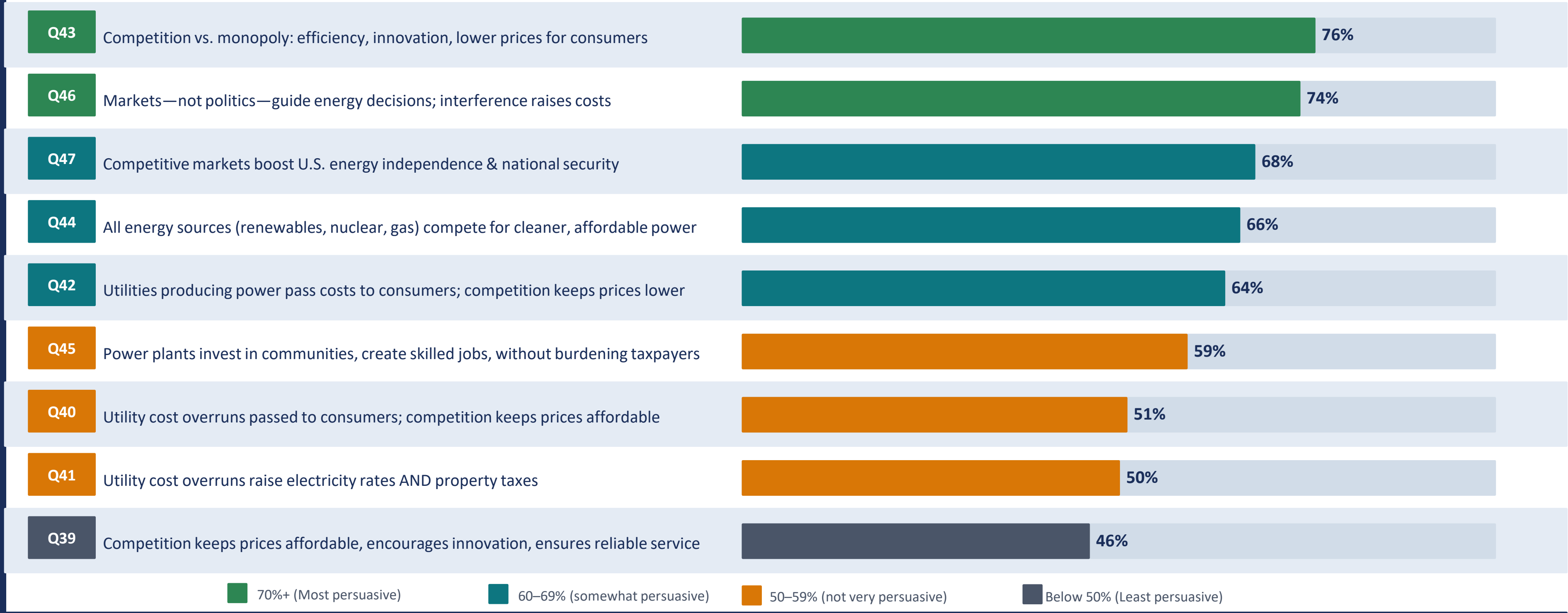
Net movement: +2 points total agreement (63% → 65%), +3 points strong agreement (32% → 35%)



SWING VOTER MESSAGE RESONANCE

Messages from Q39–Q47 ranked by % rated Convincing among Swing Voters

Swing Voters: n=75



SWING VOTER DEFINITION: Swing voters are those who, when asked in Q33, do NOT agree that NYS should continue its competitive electricity system, but then when asked again in Q48 after a battery of messages, DO agree. That is, these are the voters who are most swayed by positive messaging, and thus highly susceptible to a communications campaign.

Key Takeaways & Implications: Utilities Bad. Competition Good.

1. Cost/affordability is the overwhelming voter concern — 57% top priority, 71% bills increased, 68% say costs out of control
2. Voters dislike electric utilities, including their own, believe utility monopolies significantly influence electricity prices, and that utility prices are out of control. They do NOT want utility generation of power.
3. Competitive electricity markets have strong, bipartisan support — 63% pre-messaging, 65% post-messaging
4. 79% want government to prioritize energy market competition — consensus across key demos
5. Natural gas + affordability framing = 77% support for new facilities — even 66% of liberals agree
6. Competition and competitive markets equating to affordability vs price-increasing monopolies is *the* message, including among swing voters

N=801 Registered Voters, Statewide NY | MoE ±3.5% | Note: Small-N caution for individual utility ratings (Q10–Q16) and race subgroups (Asian n=21, Hispanic n=68)