



THE WESTERN WAY

Nevada Grid Modernization Survey

Fielded by Cygnal | Nevada Statewide | May 4–7, 2026

Methodology: Multilevel Regression with Poststratification (MRP) | N = 1,500 National Sample

MRP Topline Summary of Findings

Note: These findings are derived from Cygnal's national survey of 1,500 likely general election voters conducted May 4–7, 2026. State-level estimates were produced using Multilevel Regression and Poststratification (MRP), a widely used statistical modeling technique that combines national survey responses with state demographic and geographic data to generate reliable state-specific insights.

Executive Summary

Nevada voters are feeling the pressure of rising energy costs and they are ready to act. Seventy-nine percent of Nevada likely voters say they are concerned about the affordability of their electricity bills, and 59% report their bill has gone up over the past two years. Against this backdrop, Nevada voters express strong support for grid modernization and practical energy solutions, with support levels that closely track, and in some cases exceed, the national average.

The Nevada findings reflect a state with a distinct energy profile: heavy urban concentration in Las Vegas and Reno, rapid population growth, and a booming data center and AI infrastructure economy that is already straining the regional grid. Voters here are not abstract observers of the energy debate, they are living it. Seventy-eight percent say a candidate's position on energy affordability will influence their vote in federal elections, and 63% say they would be more likely to support a congressional candidate who backs grid modernization tied to lower long-term costs.

Section 1: Economic Context & Cost-of-Living Pressure

Nevada voters are under significant financial strain. Half (50%) say their household's financial situation has gotten worse over the past year, while only 21% report improvement. The state's political environment reflects this anxiety: 57% say the country is on the wrong track, compared to 38% who say it is heading in the right direction.

When asked which cost-of-living pressures concern them most, grocery and food prices led at 54%, followed by fuel and transportation costs at 46%. Notably, healthcare costs ranked third in Nevada at 28% – higher than the national average – reflecting the state's unique demographic and cost-of-living profile. Electricity and energy bills ranked fourth at 19%, but when asked directly, 79% expressed concern about energy affordability.

Finding	Nevada	National
Country on wrong track (Q3)	56.6%	60.6%
Household finances gotten worse past year (Q4)	50.0%	53.7%
Concerned about electricity bill affordability (Q6)	78.5%	82.2%

Finding	Nevada	National
Electricity bill gone up in past two years (Q7)	58.9%	72.3%
Grocery/food prices among top two concerns (Q5)	53.7%	54.4%
Fuel/transportation among top two concerns (Q5)	46.4%	45.2%
Healthcare costs among top two concerns (Q5)	28.3%	N/A

Nevada's electricity bill trend (59% gone up) is notably lower than the national figure (72%), which may reflect the state's regulated utility environment and NV Energy's rate structure — but concern about affordability remains high regardless.

Section 2: Energy Priorities & Grid Awareness

Nevada voters' energy priorities closely mirror the national picture. Keeping electricity costs affordable for families was the top priority at 62%, followed by ensuring grid reliability and blackout-proofing at 32%, and expanding American energy independence at 26%. Protecting the rights of local communities and property owners when building energy projects ranked fourth at 24%.

Grid modernization awareness is high: 92% of Nevada voters say it is important to modernize and upgrade the U.S. electricity grid — identical to the national figure. More than half (51%) believe the current grid needs significant upgrades to meet growing demand from AI, manufacturing reshoring, and electrification.

Nevada has a particular stake in the AI data center question. The state has attracted significant data center investment, and voters here are alert to the demand implications: 25% of Nevada voters identified growing electricity demand from new businesses, data centers, and AI as the biggest driver of rising electricity costs, the single leading response.

Finding	Nevada	National
Keeping electricity costs affordable — top priority (Q9)	61.9%	62.3%
Grid reliability/blackout-proof — top priority (Q9)	32.4%	33.2%
Expanding American energy independence (Q9)	25.9%	N/A
Protecting local/landowner rights (Q9)	23.9%	N/A
Grid modernization is important (Q12)	92.0%	92.4%
Grid needs significant upgrades for demand growth (Q16)	51.0%	53.3%
Data centers/AI cited as top cost driver (Q8)	24.6%	N/A

Section 3: Grid Investment Attitudes & Tradeoffs

Nevada voters arrive with genuine skepticism about whether grid investment will lower their bills — a skepticism that slightly exceeds the national average. Half (50%) believe grid upgrades will raise consumer costs, while only 34% believe upgrades would lower bills over time. This credibility gap is the central communications challenge for grid advocates in the state.

Despite this skepticism, support for grid investment rebounds strongly when it is framed around long-term savings and reliability. Seventy-seven percent support transmission infrastructure investment under those terms (Q15), just one point below the national figure of 78%. Initial uninformed support for grid investment

was 71% (Q27), and held at 71% even after respondents received additional information (Q31), suggesting that messaging did not erode support.

On energy strategy, Nevada voters lean toward comprehensive approaches: 38% favor an all-of-the-above strategy, while 28% prefer grid investment now to bring bills down long-term. Only 14% would prioritize lower bills now even at the risk of slower grid upgrades — a notably low figure suggesting Nevada voters are willing to invest for the long term.

Finding	Nevada	National
Support grid investment — long-term savings framing (Q15)	77.1%	78.2%
Support grid investment — initial uninformed (Q27)	70.6%	72.4%
Support grid investment — after information (Q31)	71.1%	70.8%
Grid upgrades will raise consumer costs (Q10)	49.5%	49.8%
Grid upgrades will lower bills over time (Q10)	33.5%	33.4%
All-of-the-above energy strategy (Q14)	38.4%	35.2%
Prioritize grid investment to lower bills (Q14)	28.3%	30.4%
Prioritize reliability over short-term bill savings (Q33)	53.0%	54.8%

Section 4: Messages That Move Nevada Voters

Three key messages were tested for their ability to increase support for grid investment. All three performed strongly with Nevada voters, each moving roughly two-thirds toward support — closely in line with national results:

- Affordability: Modernizing the grid lowers electricity bills by moving power more efficiently — 68.4% of Nevada voters said this made them more likely to support grid upgrades (vs. 68.6% nationally).
- Manufacturing & Jobs: Modernizing the grid powers American manufacturing and keeps the economy competitive — 63.3% said this increased their support (vs. 63.2% nationally).
- Energy Security: A more modern grid builds a more reliable and secure system, reducing foreign interference — 62.8% said this increased their support (vs. 62.9% nationally).

Affordability is the strongest message mover in Nevada, as it is nationally. The consistency of these figures between Nevada and the national sample is striking — suggesting the messaging hierarchy is durable across geographies.

Additionally, 71.2% of Nevada voters agreed with the comprehensive CEN narrative framing an all-of-the-above energy policy using every available energy source, modernizing the grid to move power efficiently, and letting competition drive down costs for families and businesses — matching the national figure of 71.6% almost exactly.

Finding	Nevada	National
Affordability message — more likely to support (Q28)	68.4%	68.6%
Energy Security message — more likely to support (Q29)	62.8%	62.9%
Manufacturing & Jobs message — more likely to support (Q30)	63.3%	63.2%
Agree with CEN master narrative (Q32)	71.2%	71.6%

Section 5: Permitting Reform, Competition & Technology

Nevada voters signal strong support for market-based and efficiency-focused solutions. Streamlining federal permitting for transmission infrastructure earned 73% support when paired with landowner rights protections — matching the national figure. Generation permitting reform earned 75% support with environmental and safety standards maintained.

On data centers and large industrial users — a particularly salient issue in Nevada given the state's data center boom — 84% of voters support requiring these facilities to demonstrate how they will power their operations before receiving permits. This is the highest-polling finding in the Nevada survey and slightly exceeds the national average of 83.5%.

Grid-enhancing technologies (GETs) remain largely unknown in Nevada: 57% have never heard of them. But once explained, 77% say it is important for policymakers to require their consideration before approving expensive new line construction — identical to the national figure.

On cost allocation, Nevada voters are clear about who should pay for grid upgrades driven by large new electricity users: 59% say the companies creating the demand should bear the infrastructure costs — a finding with direct policy implications for Nevada's data center permitting debates.

Finding	Nevada	National
Support AI/industrial energy permitting requirements (Q19)	83.9%	83.5%
Support transmission permitting reform w/ landowner rights (Q26)	72.6%	72.7%
Support generation permitting streamlining (Q23)	75.3%	74.5%
Never heard of grid-enhancing technologies (Q24)	57.0%	56.9%
GETs should be required before new construction (Q25)	77.3%	77.3%
Companies creating demand should pay for upgrades (Q18)	59.2%	N/A

Section 6: Energy Security & Supply Chain Concerns

Nevada voters connect grid modernization to national security. Half (50%) believe a more modern domestic grid would make American families more protected from energy price spikes caused by foreign conflicts or supply disruptions. Sixty-seven percent express concern — either “serious” (32%) or “moderate” (36%) — about U.S. dependence on foreign-sourced critical minerals needed for transmission lines, transformers, and energy storage.

On energy mix, Nevada voters show a pragmatic all-of-the-above sensibility: 35% prefer using every available energy source, 23% favor nuclear expansion, and 22% prefer solar and wind investment. Nevada's strong solar resources make the relative preference for nuclear particularly notable.

Finding	Nevada	National
Modern grid would protect families from foreign price shocks (Q20)	50.3%	50.6%
Concerned about foreign critical mineral dependence (Q21)	67.2%	66.5%
All-of-the-above energy mix preference (Q22)	35.0%	35.1%
Expand nuclear power (Q22)	22.7%	20.5%

Finding	Nevada	National
Invest in solar and wind (Q22)	22.2%	23.7%

Section 7: Electoral Salience

Energy affordability is a voting issue in Nevada. Seventy-eight percent of Nevada voters say a candidate's position on energy affordability and electricity costs is important to their vote in federal elections, one point below the national figure of 79.5% but still a commanding majority; and 63% say they would be more likely to support a congressional candidate who publicly backs grid modernization and expanded domestic energy production to lower long-term costs.

The legislative urgency is high: 74.8% of Nevada respondents said they want their representative to "somewhat," "very," or "extremely" strongly support legislation that speeds up permitting, expands production, and modernizes the grid with the potential to lower costs within 10 years. Nearly one in four (22%) said "extremely strongly."

Finding	Nevada	National
Energy affordability important to their vote (Q34)	78.3%	79.5%
More likely to support pro-grid modernization candidate (Q35)	63.1%	63.8%
Want representative to strongly support grid legislation (Q36)	74.8%	75.6%
Extremely strongly want representative support (Q36)	21.9%	20.9%
Very strongly want representative support (Q36)	21.1%	23.0%

Section 8: Key Nevada Distinctions from the National Sample

While Nevada's results closely track the national survey, several findings stand out as distinctly Nevada:

- Data center demand awareness is elevated. Nevada voters are more likely than average to identify growing electricity demand from AI, data centers, and new businesses as the primary driver of rising electricity costs (25%) – a direct reflection of Nevada's data center economy.
- Cost allocation clarity is strong. Fifty-nine percent say companies creating new demand should bear the infrastructure upgrade costs – a finding with direct implications for Nevada's permitting and utility rate debates.
- Healthcare costs rank higher as a financial concern. At 28%, healthcare costs are a more prominent cost-of-living concern in Nevada than in many other states, suggesting voters here see energy costs as one piece of a broader affordability squeeze.
- Nuclear support is slightly elevated. Nevada voters show somewhat stronger support for nuclear expansion (23%) than the national average (21%), perhaps reflecting familiarity with large-scale energy infrastructure.
- Bill increases are lower but concern remains high. Only 59% of Nevada voters report their bill has gone up (vs. 72% nationally), yet 79% still express concern about affordability – suggesting the concern is anticipatory as much as it is reactive.

Conclusion

The Nevada MRP data tells a consistent story with the national survey: voters are feeling energy cost pressure, understand the grid is aging, and are ready to support investment, but only when it is credibly tied to lower bills, greater reliability, and American energy independence.

For Nevada specifically, the data center and AI demand story is the sharpest local angle. Voters here understand that new large energy users are coming, they want those users to pay their fair share, and they support the permitting and infrastructure reforms needed to make that happen. The winning message framework – affordability, energy security, and competition-driven efficiency – performs as strongly in Nevada as it does nationally, giving advocates and policymakers a durable foundation for outreach in the state.

The survey was conducted by Cygnal from May 4–7, 2026. Nevada estimates were generated using multilevel regression with poststratification (MRP) applied to 1,500 likely general election voters nationwide. Full national results carry a margin of error of $\pm 2.53\%$.