



Ohio Grid Modernization Survey

Fielded by Cygnal | Ohio 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

Ohio voters are feeling acute pressure from rising energy costs and they are ready to act. Eighty-six percent of Ohio likely voters say they are concerned about the affordability of their electricity bills — the second-highest concern level among the five states surveyed — and 81% report their bill has gone up over the past two years. Against this backdrop, Ohio voters express strong support for grid modernization and practical energy solutions, with support levels that closely track the national average and exceed it on several key items.

The Ohio findings reflect a state with a distinct energy profile: a manufacturing-heavy economy, deregulated retail electricity choice, a position inside the PJM footprint where capacity auction prices have driven recent rate increases, and a rapidly expanding data center and AI infrastructure presence concentrated in central Ohio. Voters here are not abstract observers of the energy debate, they are living it. Eighty-one percent say a candidate's position on energy affordability will influence their vote in federal elections, and 62% 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

Ohio voters are under significant financial strain. More than half (52%) say their household's financial situation has gotten worse over the past year, while only 20% report improvement. The state's political environment reflects this anxiety: 60% say the country is on the wrong track, compared to 36% 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 61%, followed by fuel and transportation costs at 45%. Critically, electricity and energy bills ranked third in Ohio at 35% — well above the national average of 24% and the highest of the five states surveyed. Healthcare costs ranked fourth at 27%.

Finding	Ohio	National
Country on wrong track (Q3)	59.8%	60.6%
Household finances gotten worse past year (Q4)	51.5%	53.7%
Concerned about electricity bill affordability (Q6)	85.8%	82.2%

Finding	Ohio	National
Electricity bill gone up in past two years (Q7)	81.2%	72.3%
Grocery/food prices among top two concerns (Q5)	61.0%	54.4%
Fuel/transportation among top two concerns (Q5)	44.9%	45.2%
Electricity & energy bills among top two concerns (Q5)	35.1%	23.7%

Ohio's electricity and energy bills concern (35%) significantly exceeds the national figure (24%), placing energy near the top of the household cost-of-living conversation in Ohio. Combined with 81% reporting bill increases, this signals that energy affordability is already a dominant political issue in the state — not an emerging one.

Section 2: Energy Priorities & Grid Awareness

Ohio voters' energy priorities track the national picture closely. Keeping electricity costs affordable for families was the top priority at 63%, followed by ensuring grid reliability and blackout-proofing at 31%, and expanding American energy independence at 25%. Protecting the rights of local communities and property owners when building energy projects ranked fourth at 20%.

Grid modernization awareness is high: 92% of Ohio voters say it is important to modernize and upgrade the U.S. electricity grid — matching the national figure. More than half (54%) believe the current grid needs significant upgrades to meet growing demand from AI, manufacturing reshoring, and electrification.

Ohio has a particular stake in the AI data center question. The state has attracted massive data center investment in recent years, with hyperscaler campuses already operational or under construction in central Ohio. Voters here are alert to the demand implications: 20% of Ohio voters identified growing electricity demand from new businesses, data centers, and AI as the biggest driver of rising electricity costs — second only to utility company profits at 22%. Together, those two categories account for more than 42% of voter-identified cost drivers, framing the affordability debate as one of corporate-versus-ratepayer interests.

Finding	Ohio	National
Keeping electricity costs affordable — top priority (Q9)	62.6%	62.3%
Grid reliability/blackout-proof — top priority (Q9)	31.1%	33.2%
Expanding American energy independence (Q9)	25.3%	25.7%
Protecting local/landowner rights (Q9)	19.6%	21.7%
Grid modernization is important (Q12)	91.5%	92.4%
Grid needs significant upgrades for demand growth (Q16)	53.7%	53.3%
Data centers/AI cited as top cost driver (Q8)	20.0%	18.5%

Section 3: Grid Investment Attitudes & Tradeoffs

Ohio voters arrive with genuine skepticism about whether grid investment will lower their bills — a skepticism that closely tracks the national average. Forty-nine percent believe grid upgrades will raise consumer costs, while only 33% 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-four percent support transmission infrastructure investment under those terms

(Q15), four points below the national figure of 78% but still a commanding majority. Initial uninformed support for grid investment was 74% (Q27), and held at 71% even after respondents received additional information (Q31) — a small drift that suggests Ohio voters arrive already informed and engaged on this issue.

On energy strategy, Ohio voters lean toward comprehensive approaches: 34% favor an all-of-the-above strategy, while 30% 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 Ohio voters are willing to invest for the long term.

Finding	Ohio	National
Support grid investment — long-term savings framing (Q15)	73.7%	78.2%
Support grid investment — initial uninformed (Q27)	73.5%	72.4%
Support grid investment — after information (Q31)	71.0%	70.8%
Grid upgrades will raise consumer costs (Q10)	48.8%	49.8%
Grid upgrades will lower bills over time (Q10)	33.2%	33.4%
All-of-the-above energy strategy (Q14)	33.8%	35.2%
Prioritize grid investment to lower bills (Q14)	29.8%	30.4%
Prioritize reliability over short-term bill savings (Q33)	52.5%	54.8%

Section 4: Messages That Move Ohio Voters

Three key messages were tested for their ability to increase support for grid investment. All three performed strongly with Ohio 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 — 67.5% of Ohio 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 — 63.9% 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 — 63.6% said this increased their support (vs. 62.9% nationally).

Affordability is the strongest message mover in Ohio, as it is nationally. The manufacturing & jobs message performs particularly well in Ohio relative to other frames, reflecting the central role of manufacturing in the state's economy and identity.

Additionally, 71.3% of Ohio 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	Ohio	National
Affordability message — more likely to support (Q28)	67.5%	68.6%
Energy Security message — more likely to support (Q29)	63.6%	62.9%
Manufacturing & Jobs message — more likely to support (Q30)	63.9%	63.2%

Finding	Ohio	National
Agree with CEN master narrative (Q32)	71.3%	71.6%

Section 5: Permitting Reform, Competition & Technology

Ohio voters signal strong support for market-based and efficiency-focused solutions. Streamlining federal permitting for transmission infrastructure earned 71% support when paired with landowner rights protections — just below the national figure of 73%. Generation permitting reform earned 74% support with environmental and safety standards maintained.

On data centers and large industrial users — a particularly salient issue in Ohio 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 Ohio survey and is in line with the national average of 83.5%.

Grid-enhancing technologies (GETs) remain largely unknown in Ohio: 58% have never heard of them. But once explained, 78% say it is important for policymakers to require their consideration before approving expensive new line construction — in line with the national figure.

On cost allocation, Ohio voters are clear about who should pay for grid upgrades driven by large new electricity users: 60% say the companies creating the demand should bear the infrastructure costs — a finding with direct policy implications for Ohio's data center siting debates and PUCO rate cases.

Finding	Ohio	National
Support AI/industrial energy permitting requirements (Q19)	84.2%	83.5%
Support transmission permitting reform w/ landowner rights (Q26)	70.7%	72.7%
Support generation permitting streamlining (Q23)	74.3%	74.5%
Never heard of grid-enhancing technologies (Q24)	58.3%	56.9%
GETs should be required before new construction (Q25)	78.1%	77.3%
Companies creating demand should pay for upgrades (Q18)	59.6%	53.8%

Section 6: Energy Security & Supply Chain Concerns

Ohio voters connect grid modernization to national security. Half (51%) believe a more modern domestic grid would make American families more protected from energy price spikes caused by foreign conflicts or supply disruptions. Sixty-five percent express concern — either "serious" (27%) or "moderate" (38%) — about U.S. dependence on foreign-sourced critical minerals needed for transmission lines, transformers, and energy storage.

On energy mix, Ohio voters show a pragmatic all-of-the-above sensibility: 36% prefer using every available energy source, 22% favor nuclear expansion, and 21% prefer solar and wind investment. Nuclear support in Ohio modestly exceeds the national average, consistent with the state's existing nuclear footprint and recent legislative debates over baseload generation.

Finding	Ohio	National
Modern grid would protect families from foreign price shocks (Q20)	51.3%	50.6%
Concerned about foreign critical mineral dependence (Q21)	65.2%	66.5%
All-of-the-above energy mix preference (Q22)	35.8%	35.1%
Expand nuclear power (Q22)	21.5%	20.5%
Invest in solar and wind (Q22)	21.0%	23.7%

Section 7: Electoral Salience

Energy affordability is a voting issue in Ohio. Eighty-one percent of Ohio voters say a candidate's position on energy affordability and electricity costs is important to their vote in federal elections — slightly above the national figure of 79.5% — and 62% 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 meaningful: 69.0% of Ohio 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. Just under one in five (18%) said "extremely strongly."

Finding	Ohio	National
Energy affordability important to their vote (Q34)	80.9%	79.5%
More likely to support pro-grid modernization candidate (Q35)	62.4%	63.8%
Want representative to strongly support grid legislation (Q36)	69.0%	75.6%
Extremely strongly want representative support (Q36)	18.2%	20.9%
Very strongly want representative support (Q36)	19.7%	23.0%

Section 8: Key Ohio Distinctions from the National Sample

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

- Energy is a top-tier household cost concern. At 35%, electricity and energy bills are the highest-ranked cost-of-living concern of any tested state and 11 points above the national figure — a direct reflection of recent rate increases and PJM capacity costs.
- Bill increases are deeply felt. 81% of Ohio voters report their bill has gone up — well above the national figure of 72% — making cost concern in Ohio reactive and current, not anticipatory.
- Concern about electricity affordability is near the top of the field. At 86%, Ohio's energy affordability concern is the second-highest of the five states surveyed, behind only Wisconsin.
- Data center demand is recognized as a major cost driver. 20% of Ohio voters identified growing electricity demand from AI, data centers, and new businesses as the primary driver of rising electricity costs — a direct reflection of Ohio's data center boom and a key opening for accountability-focused messaging.

- Cost allocation clarity is strong. 60% say companies creating new demand should bear the infrastructure upgrade costs — a finding with direct implications for Ohio's permitting, utility rate, and data center attraction debates.

Conclusion

The Ohio MRP data tells a consistent story with the national survey, but at higher intensity: voters are already feeling sharp 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 Ohio specifically, the combination of acute bill-trend awareness, elevated data center cost-driver recognition, and energy bills' status as a top-tier household concern makes Ohio a high-salience environment for grid modernization messaging. 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, manufacturing & jobs, and energy security — performs as strongly in Ohio as it does nationally, with the manufacturing frame carrying particular weight in a manufacturing-heavy state.

**The survey was conducted by Cygnal from May 4–7, 2026. Ohio 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 $\pm 2.53\%$. **