



South Carolina Grid Modernization Survey

Fielded by Cygnal | South Carolina 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

South Carolina voters are feeling the pressure of rising energy costs and they are ready to act. Seventy-nine percent of South Carolina likely voters say they are concerned about the affordability of their electricity bills, and 67% report their bill has gone up over the past two years — the lowest bill-increase share of the five states, suggesting that South Carolina's energy cost conversation is anticipatory as much as reactive. Against this backdrop, South Carolina voters express strong support for grid modernization and practical energy solutions, with support levels that closely track the national average.

The South Carolina findings reflect a state with a distinct energy profile: a regulated utility environment marked by the V.C. Summer nuclear project history, the most conservative electorate of the five tested states, significant manufacturing and economic-development activity along the I-85 corridor, and a substantial Black share of the electorate (24%). Voters here are not abstract observers of the energy debate, they are living it. Seventy-nine percent say a candidate's position on energy affordability will influence their vote in federal elections, and 60% 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

South Carolina 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: 58% 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 51%, followed by fuel and transportation costs at 46%. Healthcare costs ranked third at 29%, followed by housing at 23% and electricity and energy bills at 22%. When asked directly, 79% expressed concern about energy affordability.

Finding	South Carolina	National
Country on wrong track (Q3)	57.9%	60.6%
Household finances gotten worse past year (Q4)	49.6%	53.7%

Finding	South Carolina	National
Concerned about electricity bill affordability (Q6)	79.1%	82.2%
Electricity bill gone up in past two years (Q7)	67.3%	72.3%
Grocery/food prices among top two concerns (Q5)	51.2%	54.4%
Fuel/transportation among top two concerns (Q5)	45.6%	45.2%
Electricity & energy bills among top two concerns (Q5)	21.8%	23.7%

South Carolina's electricity bill trend (67% gone up) is the lowest of the five states surveyed, likely reflecting the state's regulated utility environment and the rate stability that followed the V.C. Summer settlements — but concern about affordability remains high regardless, and 67% is still a substantial supermajority reporting cost pressure.

Section 2: Energy Priorities & Grid Awareness

South Carolina voters' energy priorities closely mirror the national picture. Keeping electricity costs affordable for families was the top priority at 59%, followed by ensuring grid reliability and blackout-proofing at 29%, and expanding American energy independence at 26%. Notably, South Carolina voters were the most likely of the five states to cite establishing American energy dominance as a top priority (17%), reflecting the state's conservative political character.

Grid modernization awareness is high: 90% of South Carolina voters say it is important to modernize and upgrade the U.S. electricity grid — two points below the national figure of 92% but still a near-universal consensus. Just over half (51%) believe the current grid needs significant upgrades to meet growing demand from AI, manufacturing reshoring, and electrification.

On the cost-driver question, utility company profits led at 21%, followed by rising fuel and energy input costs at 17%, an aging grid at 11%, and government regulations at 11%. South Carolina voters identified data center and AI demand as a cost driver less frequently than other states (14% vs. 25% in Nevada and 22% in Wisconsin), reflecting the state's smaller data center footprint to date.

Finding	South Carolina	National
Keeping electricity costs affordable — top priority (Q9)	58.9%	62.3%
Grid reliability/blackout-proof — top priority (Q9)	29.1%	33.2%
Expanding American energy independence (Q9)	25.9%	25.7%
Protecting local/landowner rights (Q9)	20.7%	21.7%
Grid modernization is important (Q12)	89.9%	92.4%
Grid needs significant upgrades for demand growth (Q16)	50.6%	53.3%
Data centers/AI cited as top cost driver (Q8)	14.1%	18.5%

Section 3: Grid Investment Attitudes & Tradeoffs

South Carolina voters arrive with genuine skepticism about whether grid investment will lower their bills — a skepticism in line with the national average. Half (50%) 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%. Initial uninformed support for grid investment was 69% (Q27), and held at 68% after respondents received additional information (Q31) — suggesting that messaging maintains but does not significantly expand support in South Carolina.

On energy strategy, South Carolina voters lean toward comprehensive approaches: 34% favor an all-of-the-above strategy, while 28% prefer grid investment now to bring bills down long-term. Seventeen percent would prioritize lower bills now even at the risk of slower grid upgrades — the highest share of the five states, suggesting South Carolina's more conservative electorate is somewhat more cost-sensitive in the short-term tradeoff.

Finding	South Carolina	National
Support grid investment — long-term savings framing (Q15)	73.6%	78.2%
Support grid investment — initial uninformed (Q27)	68.5%	72.4%
Support grid investment — after information (Q31)	68.4%	70.8%
Grid upgrades will raise consumer costs (Q10)	49.7%	49.8%
Grid upgrades will lower bills over time (Q10)	32.5%	33.4%
All-of-the-above energy strategy (Q14)	33.6%	35.2%
Prioritize grid investment to lower bills (Q14)	28.2%	30.4%
Prioritize reliability over short-term bill savings (Q33)	52.0%	54.8%

Section 4: Messages That Move South Carolina Voters

Three key messages were tested for their ability to increase support for grid investment. All three performed strongly with South Carolina 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 — 66.8% of South Carolina 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 — 62.3% said this increased their support (vs. 62.9% nationally).

Affordability is the strongest message mover in South Carolina, as it is nationally. The manufacturing & jobs message also performs slightly above the national average, reflecting the state's significant manufacturing employment along the I-85 corridor.

Additionally, 71.2% of South Carolina 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	South Carolina	National
Affordability message — more likely to support (Q28)	66.8%	68.6%
Energy Security message — more likely to support (Q29)	62.3%	62.9%
Manufacturing & Jobs message — more likely to support (Q30)	63.9%	63.2%
Agree with CEN master narrative (Q32)	71.2%	71.6%

Section 5: Permitting Reform, Competition & Technology

South Carolina voters signal strong support for market-based and efficiency-focused solutions. Streamlining federal permitting for transmission infrastructure earned 70% support when paired with landowner rights protections – three points below the national figure. Generation permitting reform earned 71% support with environmental and safety standards maintained.

On data centers and large industrial users, 81% 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 South Carolina survey, though it sits two points below the national average of 83.5%, reflecting the smaller salience of data center development in the state to date.

Grid-enhancing technologies (GETs) remain largely unknown in South Carolina: 56% have never heard of them. But once explained, 74% say it is important for policymakers to require their consideration before approving expensive new line construction — three points below the national figure of 77%.

On cost allocation, South Carolina voters are clear about who should pay for grid upgrades driven by large new electricity users: 45% say the companies creating the demand should bear the infrastructure costs — the lowest share of the five states, but still a plurality. Notably, 17% of South Carolina voters preferred a combination of all approaches, suggesting the state's voters are more open to shared cost models than peers in other states.

Finding	South Carolina	National
Support AI/industrial energy permitting requirements (Q19)	81.2%	83.5%
Support transmission permitting reform w/ landowner rights (Q26)	70.0%	72.7%
Support generation permitting streamlining (Q23)	70.6%	74.5%
Never heard of grid-enhancing technologies (Q24)	56.0%	56.9%
GETs should be required before new construction (Q25)	74.2%	77.3%
Companies creating demand should pay for upgrades (Q18)	45.0%	53.8%

Section 6: Energy Security & Supply Chain Concerns

South Carolina voters connect grid modernization to national security more strongly than any of the four other states. 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. Seventy-two percent express concern — either "serious" (38%) or "moderate" (34%) — about U.S. dependence on foreign-sourced critical minerals needed for transmission lines, transformers, and energy storage. The "serious national security concern" figure of 38% is the highest among the five states.

On energy mix, South Carolina voters show a pragmatic all-of-the-above sensibility: 36% prefer using every available energy source, 20% favor nuclear expansion, and 19% prefer solar and wind investment. Given South Carolina's existing nuclear fleet and the legacy of the V.C. Summer project, the preference for nuclear is notable but more moderate than might be expected.

Finding	South Carolina	National
Modern grid would protect families from foreign price shocks (Q20)	50.2%	50.6%
Concerned about foreign critical mineral dependence (Q21)	71.8%	66.5%
All-of-the-above energy mix preference (Q22)	36.4%	35.1%
Expand nuclear power (Q22)	20.2%	20.5%
Invest in solar and wind (Q22)	18.8%	23.7%

Section 7: Electoral Salience

Energy affordability is a voting issue in South Carolina. Seventy-nine percent of South Carolina voters say a candidate's position on energy affordability and electricity costs is important to their vote in federal elections, in line with the national figure of 79.5%; and 60% 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: 70.0% of South Carolina 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. Nineteen percent said "extremely strongly."

Finding	South Carolina	National
Energy affordability important to their vote (Q34)	78.6%	79.5%
More likely to support pro-grid modernization candidate (Q35)	59.7%	63.8%
Want representative to strongly support grid legislation (Q36)	70.0%	75.6%
Extremely strongly want representative support (Q36)	19.0%	20.9%
Very strongly want representative support (Q36)	20.5%	23.0%

Section 8: Key South Carolina Distinctions from the National Sample

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

- National security framing is the strongest of any state. 38% of South Carolina voters see foreign critical mineral dependence as a serious national security concern – the highest figure of the five states – opening particular space for energy-security framing in the state.
- Bill increases are less widespread. Only 67% of South Carolina voters report their bill has gone up – the lowest of the five states – likely reflecting the state's regulated utility environment and post-V.C. Summer rate stability.

- Conservative electorate is more short-term cost sensitive. 17% of South Carolina voters would prioritize lower bills now even at the risk of slower grid upgrades — the highest of any state — suggesting affordability messaging must be paired with credible delivery timelines.
- Energy dominance framing resonates. 17% cited establishing American energy dominance as a top priority, the highest of the five states, reflecting the state's conservative ideological character and creating space for energy-strength messaging alongside affordability.
- Data center salience is lower. South Carolina voters were less likely than peers in other states to identify data center demand as a top cost driver (14%), reflecting the state's smaller data center footprint to date — though the state's industrial development trajectory may shift this in coming cycles.

Conclusion

The South Carolina 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 South Carolina specifically, the combination of strong national security concern, conservative voter alignment with energy dominance framing, and a relatively cost-sensitive electorate makes the state particularly receptive to messaging that ties grid modernization to American strength, supply chain independence, and competitive energy markets. The winning message framework – affordability, manufacturing & jobs, and energy security – performs as strongly in South Carolina as it does nationally, with energy security and manufacturing carrying particular weight given the state's geopolitical sensitivity and industrial economy.

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