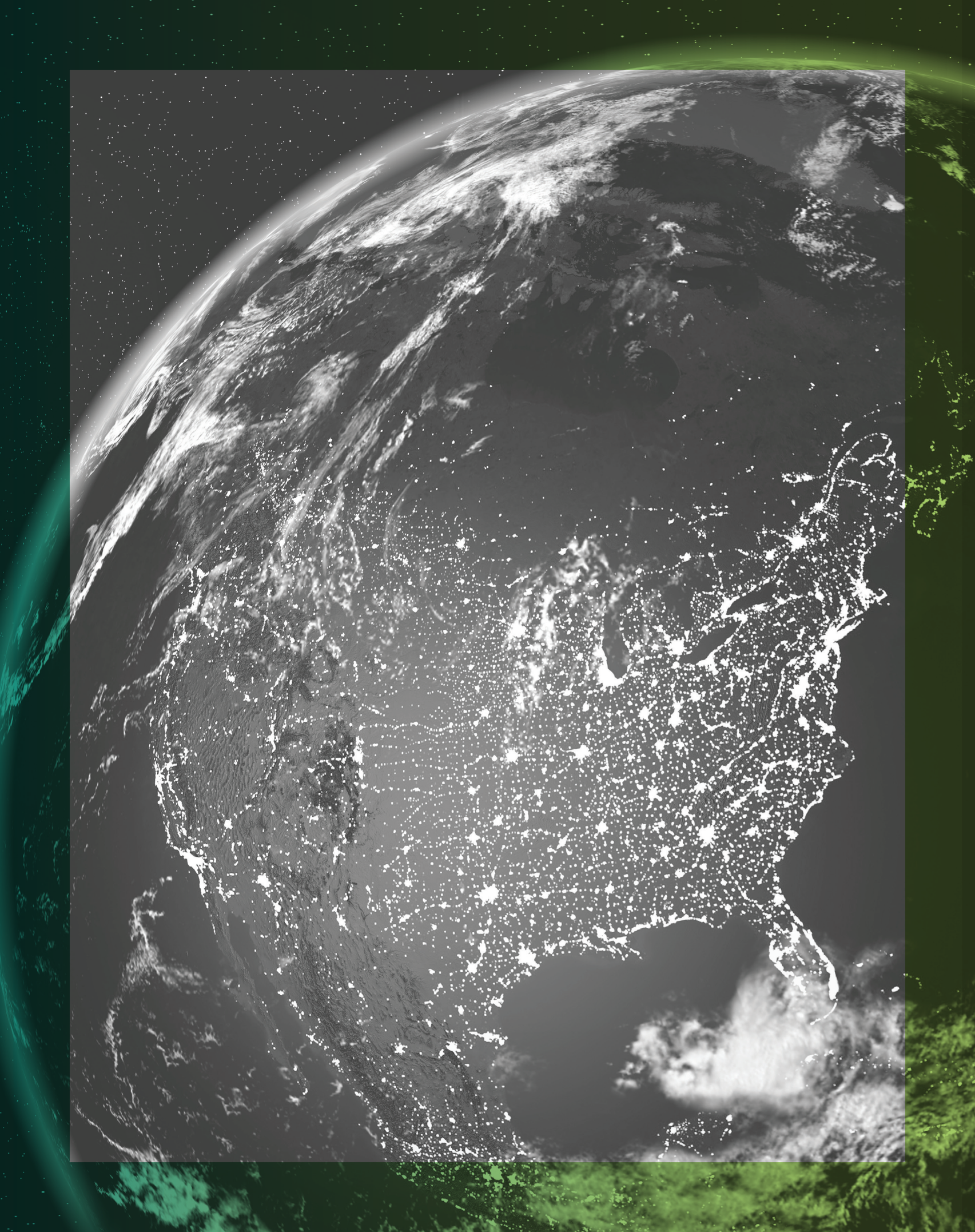
Davies GRP

AMERICAN ENERGY LANDSCAPE 2025

THE DAVIES NATIONAL PUBLIC OPINION STUDY



AMERICANS WANT MORE ENERGY. FROM TRUSTED SOURCES. BUILT RIGHT. AND THEY WANT A SAY IN WHAT AND WHERE.

Energy demand and supply in America is changing quickly and unlike decision makers from both sides of the aisle, the public is focused and believes now is the time to act on all sources.

At the Davies Group, we believe approval begins by listening first. Our 2025 National Public Opinion Study captures the current pulse of Americans on energy development, offering a rare permission structure to move with both speed and confidence. Americans broadly support a future powered by a diverse mix of American-grown energy, from renewables like solar and wind to natural gas and emerging sources such as new nuclear technologies.

A positive perception alone is not enough. The data confirms what we see across the country: projects success is based on a very localized first impression. A community that feels uninformed or excluded is primed for resistance, regardless of how popular the energy source is in principle. And it's easy for those opposed to plant seeds of doubt in a vacuum.

Strategy and speed must work together. Knowing what to say – to whom – and doing so in a persuasive manner to dominate a first in the mind position matters more than ever.

With federal incentives tied to tight development timelines, every month matters. To succeed, energy developers must communicate clearly, credibly and first to reinforce what the public already values while addressing common fears driven by change, insignificance and the unknown.

This study of nearly 800 Americans across all regions and political identities shows strong support for solar (84%), land-based wind (75%), natural gas (82%) and nuclear (51%). Yet concerns about property values, environmental impact and community engagement remain. As decades of project work have shown, this is not a zero-sum energy debate. Americans want more energy from more sources, built responsibly.

The insights in this study are meant to help project leaders move smarter and faster, tell better stories, counter common concerns and earn the social license needed to move forward.

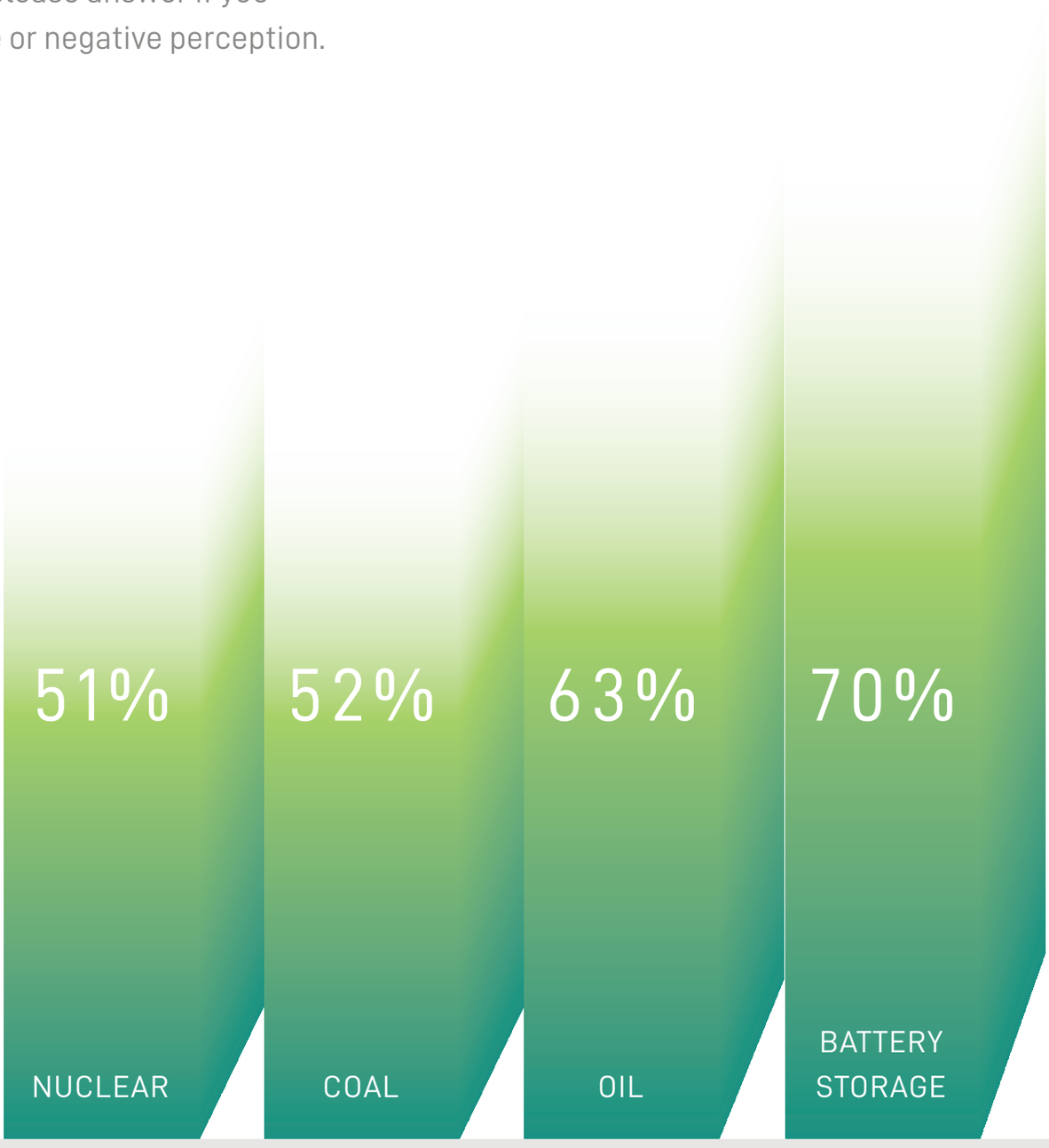
While support for American energy is high, projects across the nation continue to prove that approval must still be earned.

JOHN DAVIES
Chairman + CEO
Davies Group

POSITVE PERCEPTION BY ENERGY SOURCE

Question: Below you can see a list of sources of energy by industry.

For each one, please answer if you have a positive or negative perception.



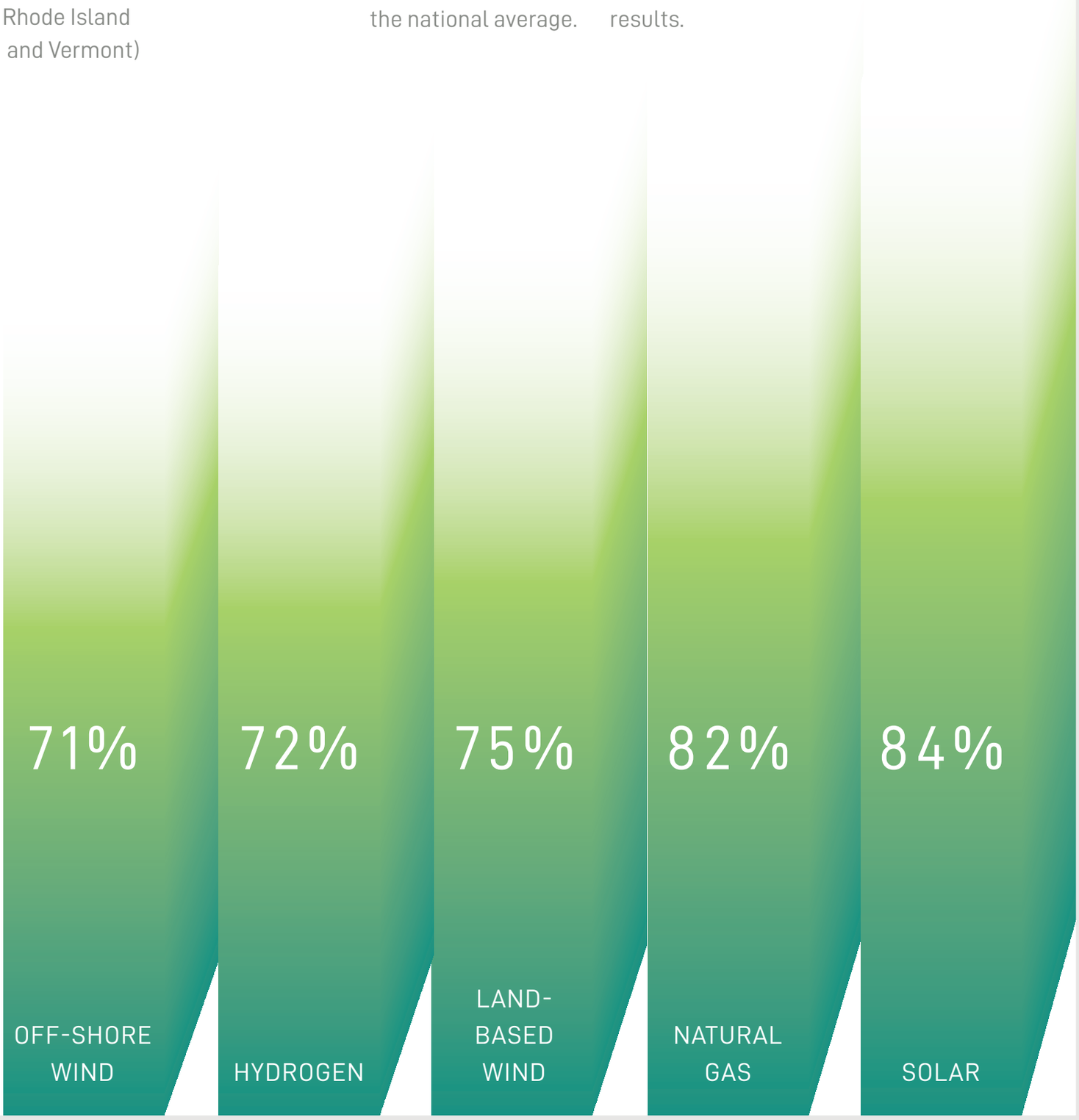
INSIGHTS

New England Region (Connecticut, Maine, Massachusetts, New Hampshire, Rhode Island and Vermont)

94.9% Positive Perception of Natural Gas

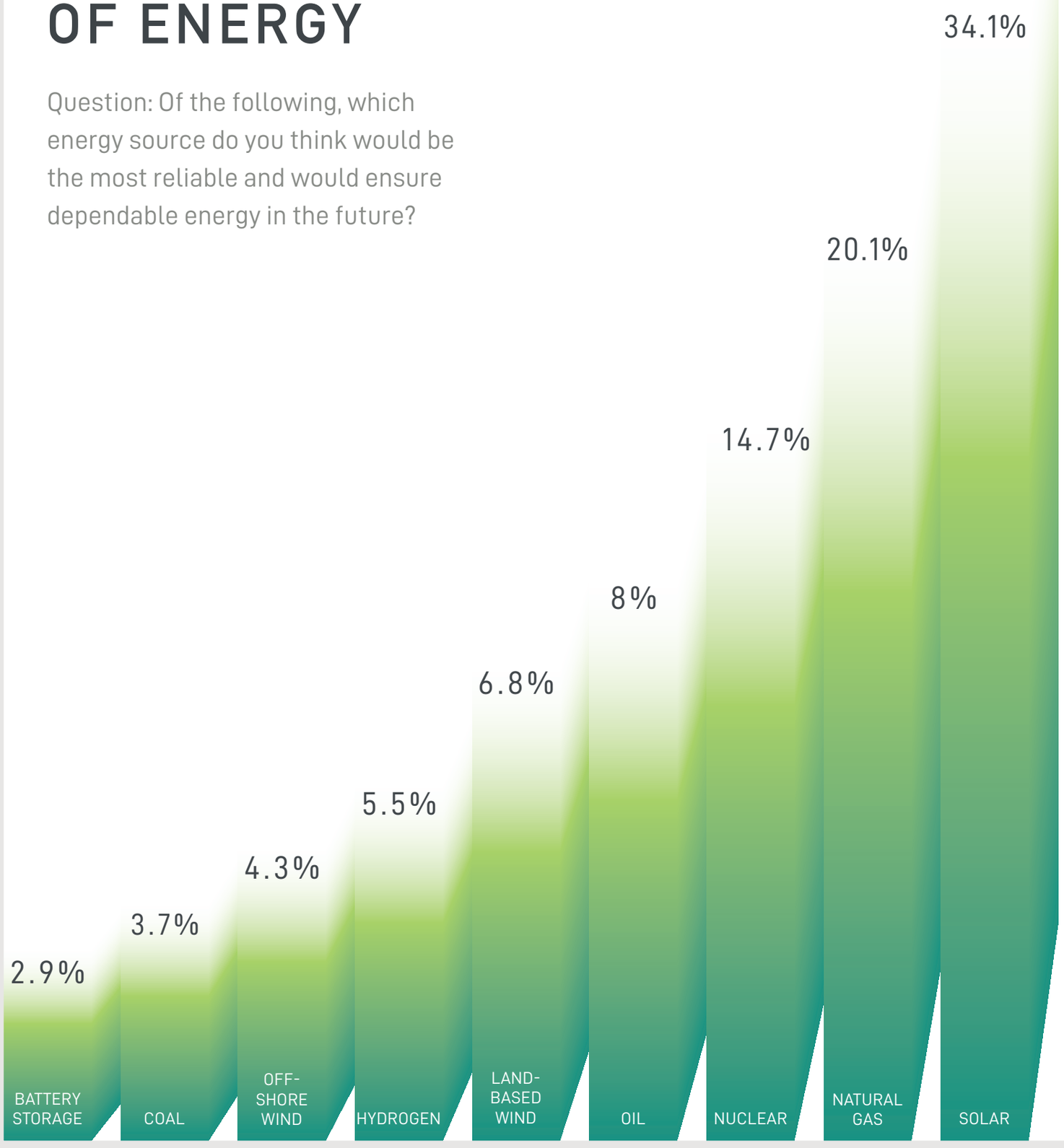
Support for natural gas in the New England Region is especially strong, with support being 13.8% stronger than the national average.

Positive perception of both battery storage and nuclear have significantly increased as compared to 2024 results.



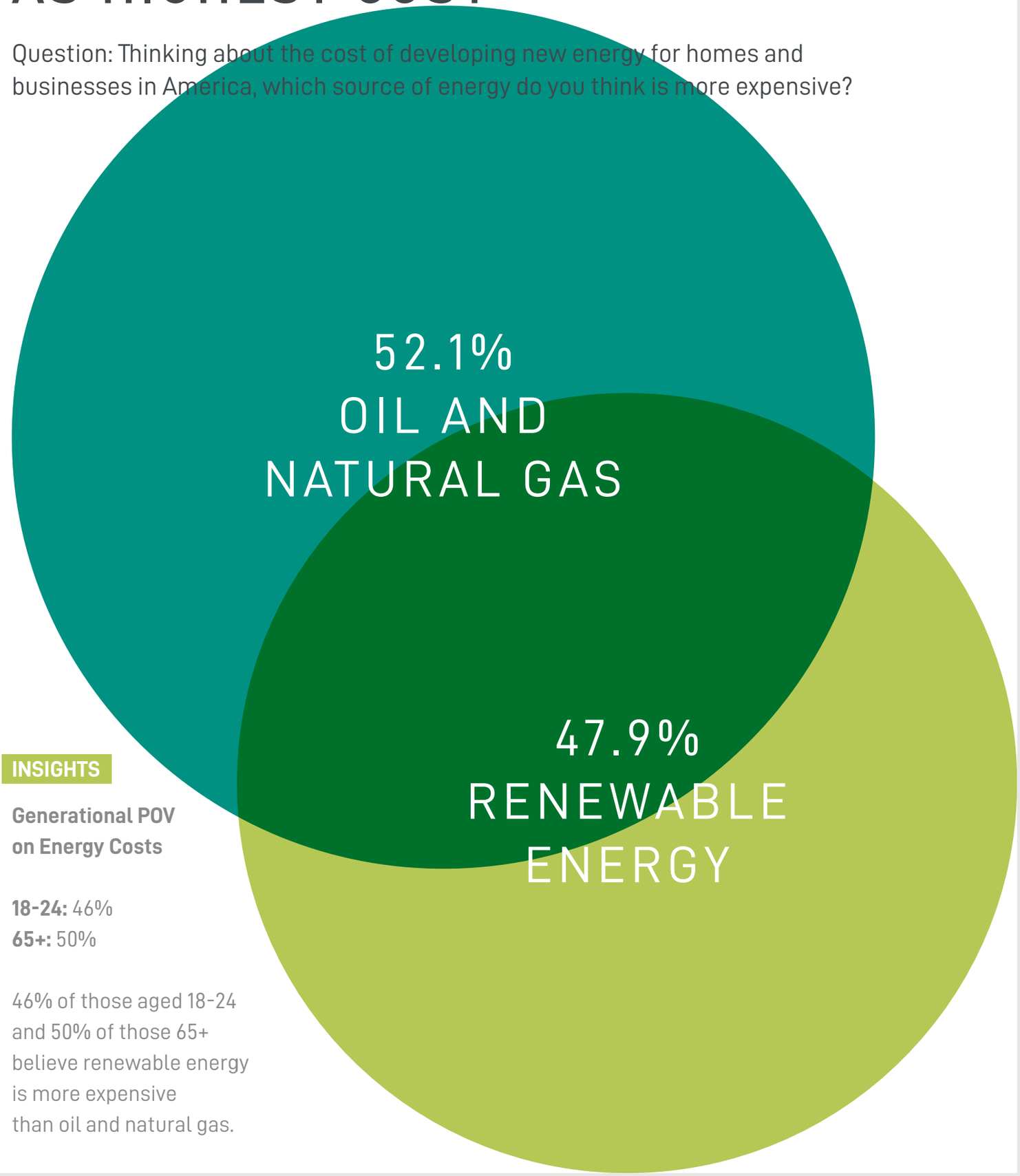
SOLAR IS SEEN AS THE MOST RELIABLE SOURCE OF ENERGY

Question: Of the following, which energy source do you think would be the most reliable and would ensure dependable energy in the future?



OIL AND GAS SEEN AS HIGHEST COST

Question: Thinking about the cost of developing new energy for homes and businesses in America, which source of energy do you think is more expensive?

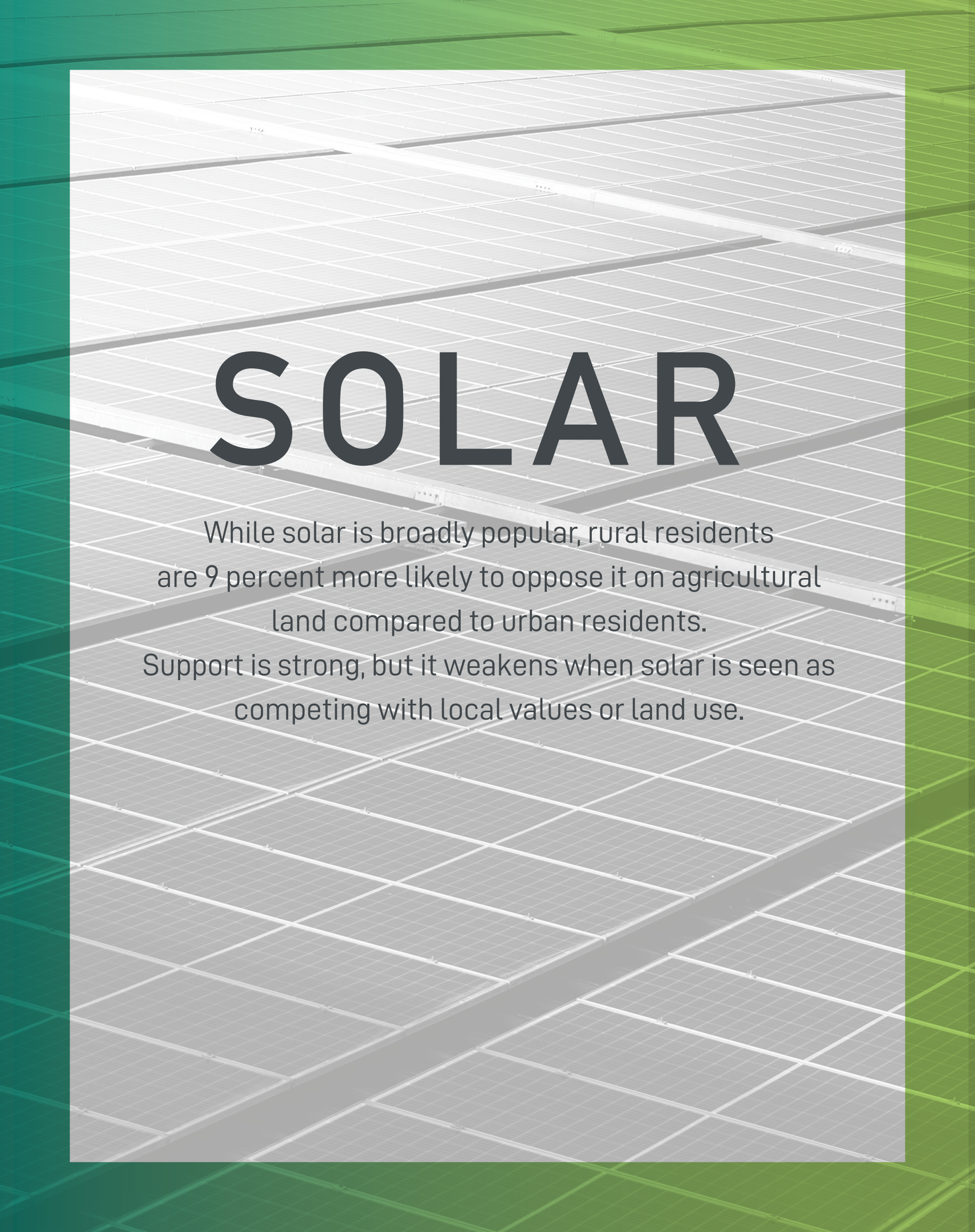


INSIGHTS

Generational POV on Energy Costs

18-24: 46%
65+: 50%

46% of those aged 18-24 and 50% of those 65+ believe renewable energy is more expensive than oil and natural gas.



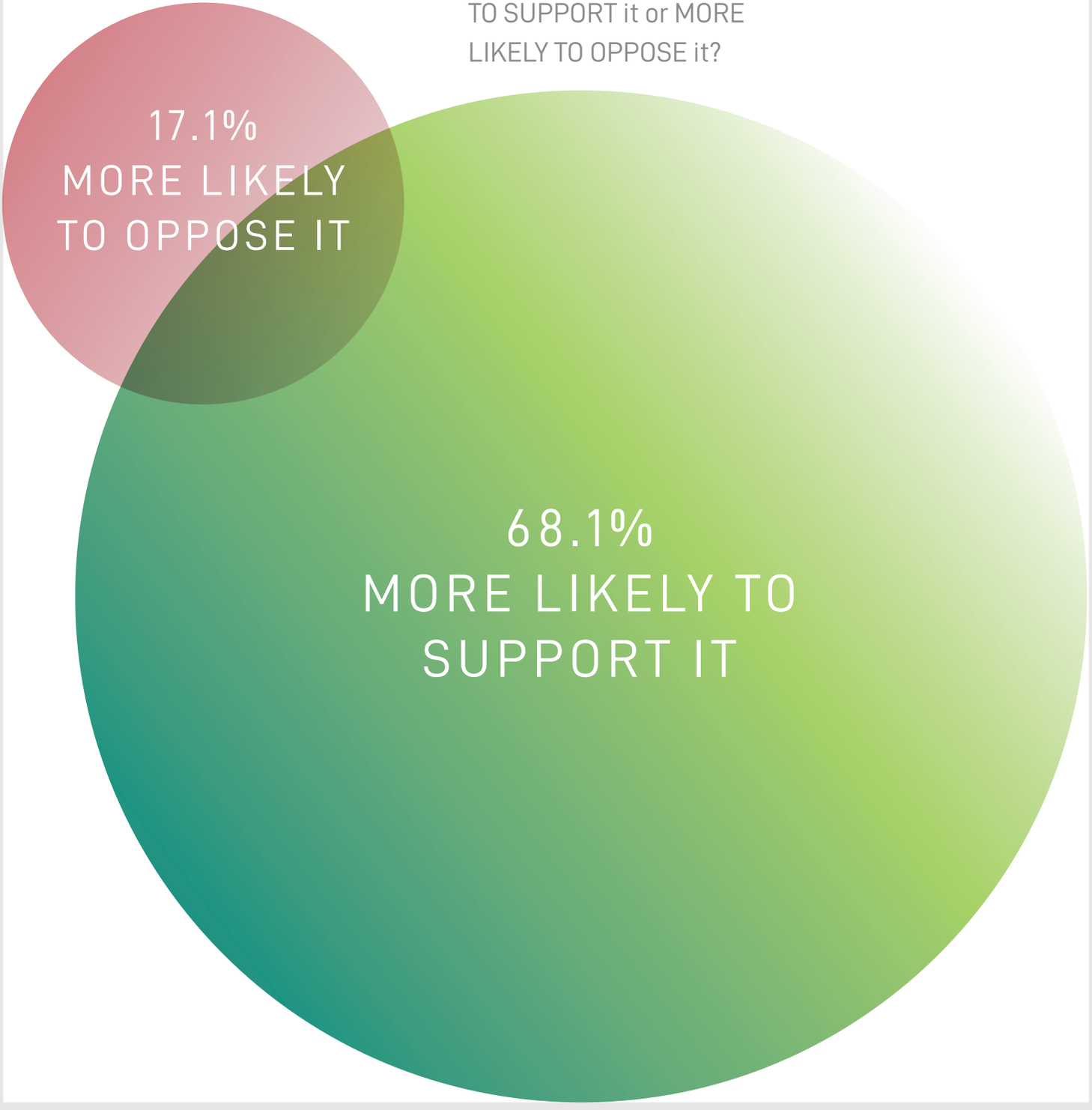
SOLAR

While solar is broadly popular, rural residents are 9 percent more likely to oppose it on agricultural land compared to urban residents.
Support is strong, but it weakens when solar is seen as competing with local values or land use.

PRE PERSUASION*: SOLAR PROJECT

Question: If a solar farm was proposed in your region (assuming there was enough sunlight), would you be MORE LIKELY TO SUPPORT it or MORE LIKELY TO OPPOSE it?

*Pre-persuasion questions measure respondents' opinions before they are exposed to any new information or arguments, providing a baseline to compare against post-persuasion results.



PERSUASION

MESSAGE ACCEPTANCE FOR SOLAR IN YOUR REGION

TOTAL MORE LIKELY TO SUPPORT

Solar farms are a good neighbor (quiet, low to ground, no real traffic) compared to other developments.

Solar farms can diversify and strengthen the energy grid.

Solar farms operate with no air or water emissions.

Solar farms now cost less than traditional energy sources to develop.

Solar farms provide substantial annual local tax revenue along with jobs and local construction spending.

A private property owner makes the final decision to build a solar farm on their land.

Question: Please answer if the following statement would make you MORE LIKELY TO SUPPORT or MORE LIKELY TO OPPOSE a solar farm.

TOTAL MORE LIKELY TO OPPOSE

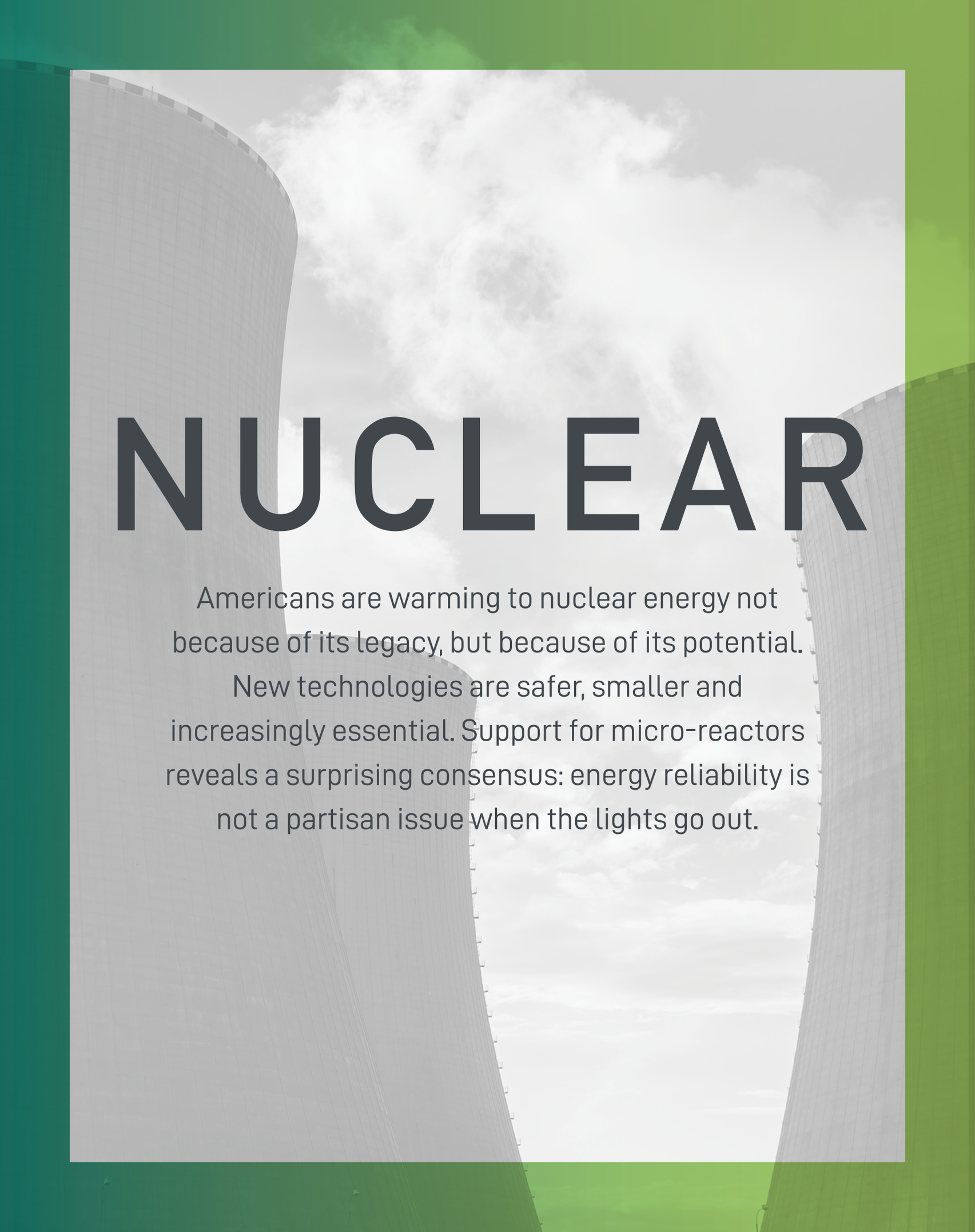
POST PERSUASION: SOLAR PROJECT

Question: Now that you have learned more about solar farms, if a solar farm was proposed in your region would you be MORE LIKELY TO SUPPORT it or MORE LIKELY TO OPPOSE?

"SOLAR REMAINS THE MOST PREFERRED ENERGY SOURCE NATIONWIDE BECAUSE IT ALIGNS WITH WHAT PEOPLE WANT - QUIET, CLEAN POWER THAT SUPPORTS LOCAL COMMUNITIES AND REQUIRES NO EMISSIONS."

JOHN DAVIES

CEO, DAVIES GROUP

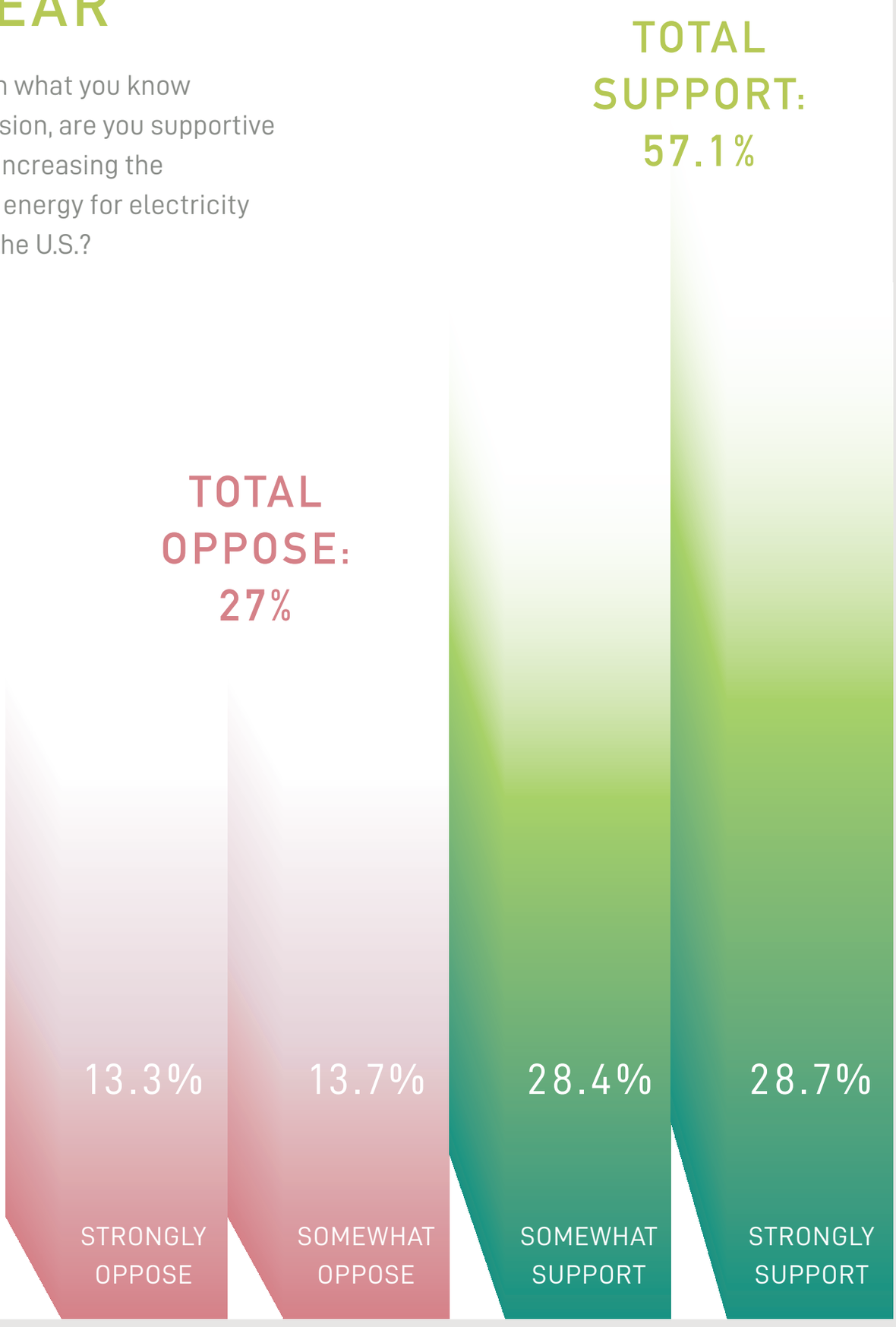


NUCLEAR

Americans are warming to nuclear energy not because of its legacy, but because of its potential. New technologies are safer, smaller and increasingly essential. Support for micro-reactors reveals a surprising consensus: energy reliability is not a partisan issue when the lights go out.

PRE-PERSUASION: NUCLEAR

Question: From what you know or your impression, are you supportive or opposed to increasing the use of nuclear energy for electricity generation in the U.S.?



MESSAGE ACCEPTANCE FOR NUCLEAR

TOTAL MORE LIKELY TO SUPPORT

Nuclear energy supports thousands of high-paying American jobs and local tax revenues.

New nuclear technologies are safer, smaller and more efficient than older designs.

Nuclear plants can operate 24/7 and provide consistent, reliable baseload power.

Nuclear energy reduces dependence on foreign fossil fuels and enhances national security.

Nuclear power produces zero carbon emissions while generating electricity.

Question: Please indicate if the following statements would make you more likely to support or more likely to oppose nuclear energy development.

TOTAL MORE LIKELY TO OPPOSE

Accidents like Chernobyl and Fukushima show the potential dangers of nuclear energy.

Nuclear waste remains radioactive for thousands of years and there is no long-term solution.

Communities near nuclear plants may experience reduced property values or stigma.

Nuclear energy investment takes money away from renewables like wind and solar.

Nuclear power plants are expensive and take a long time to build.

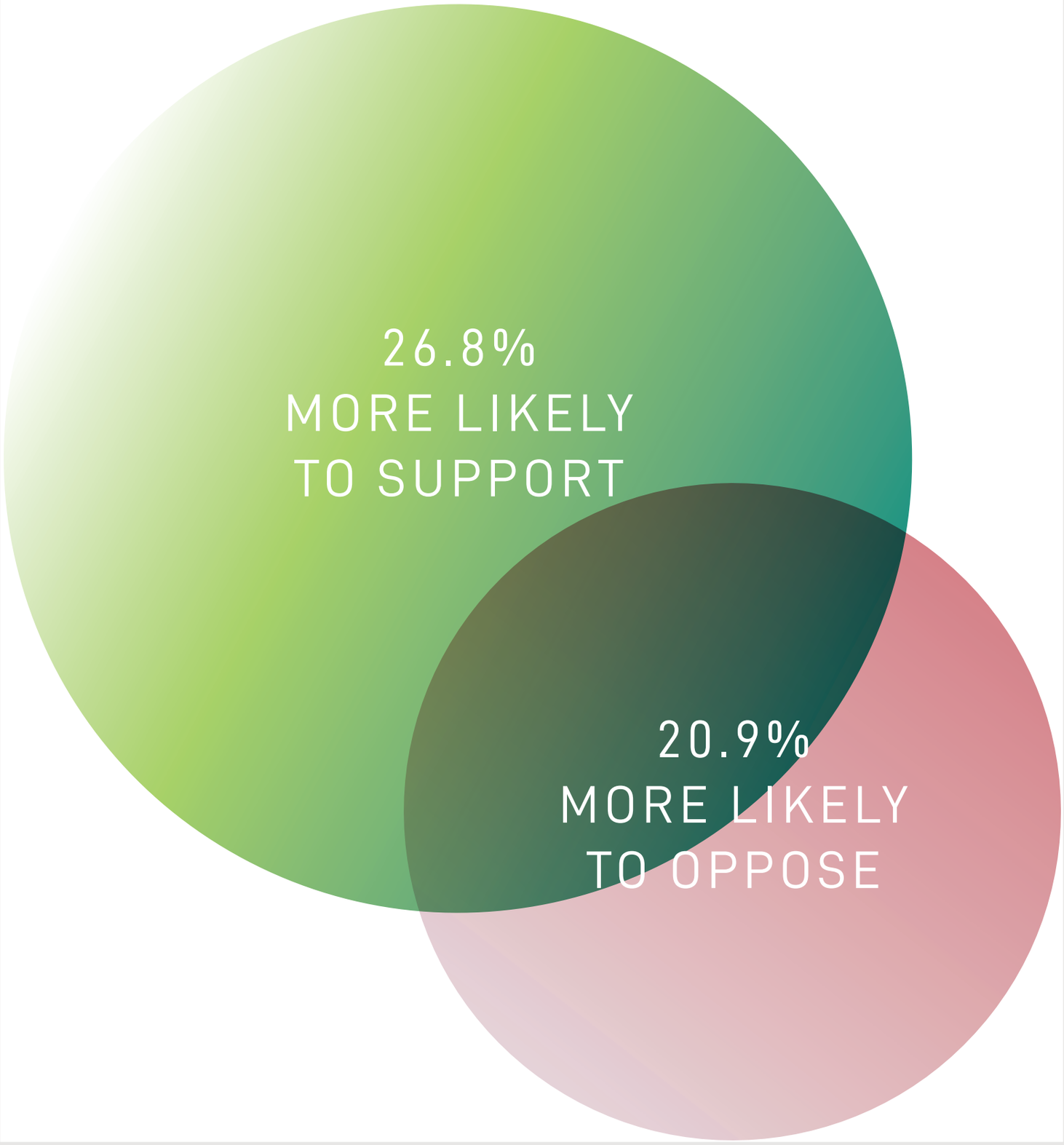
"MICRO-NUCLEAR REACTORS ARE ONE OF THE FEW ENERGY ISSUES WITH TRUE CROSS-PARTY MOMENTUM."

JOHN DAVIES

CEO, DAVIES GROUP

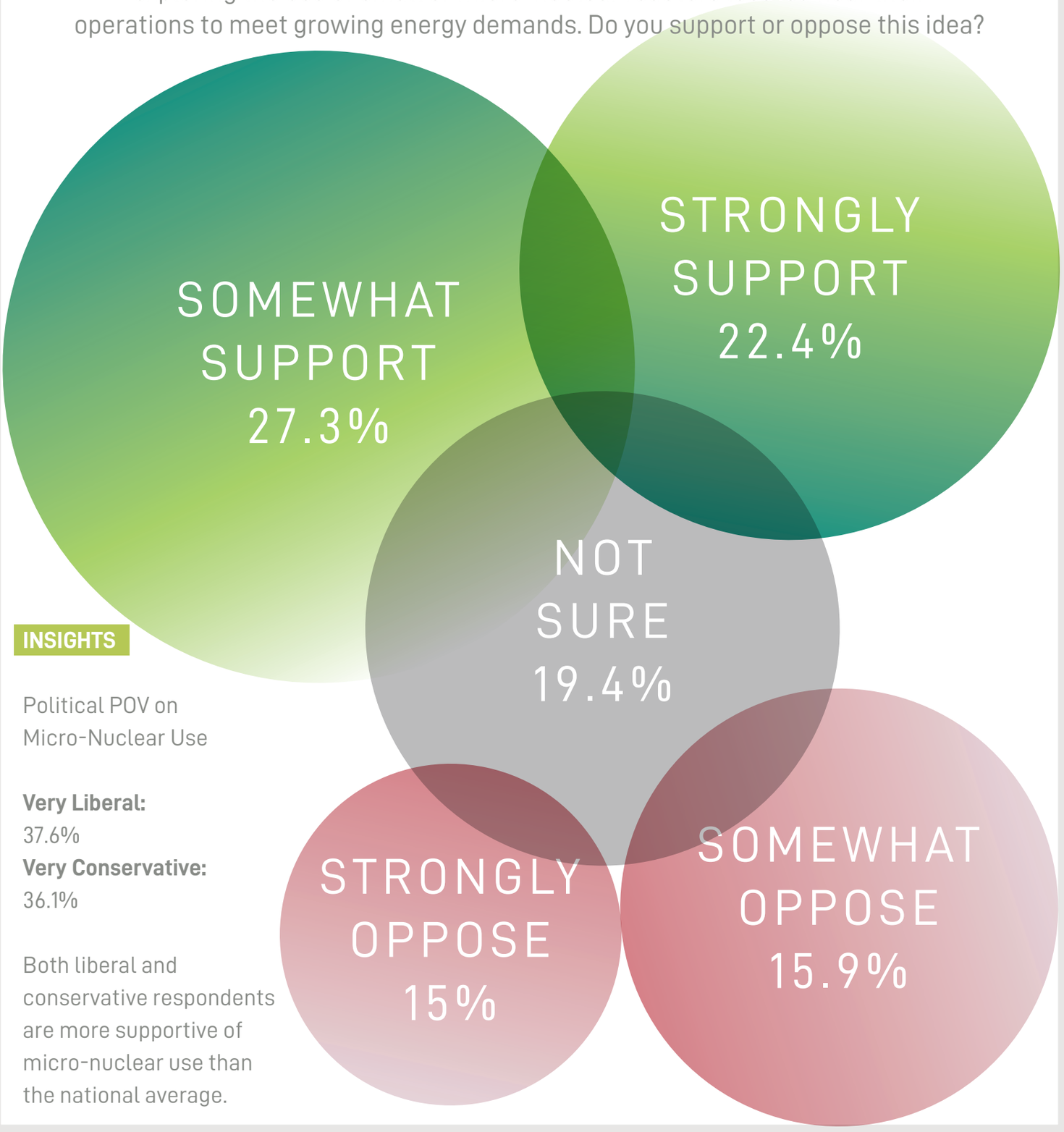
POST PERSUASION
NUCLEAR

Question: After reading these statements, has your opinion of nuclear energy



PUBLIC RECEPTIVENESS TO MICRO-NUCLEAR IS STRONG

Question: Some large power users – like data centers and manufacturing facilites – are exploring the use of small or micro-nuclear reactors located near their operations to meet growing energy demands. Do you support or oppose this idea?



INSIGHTS

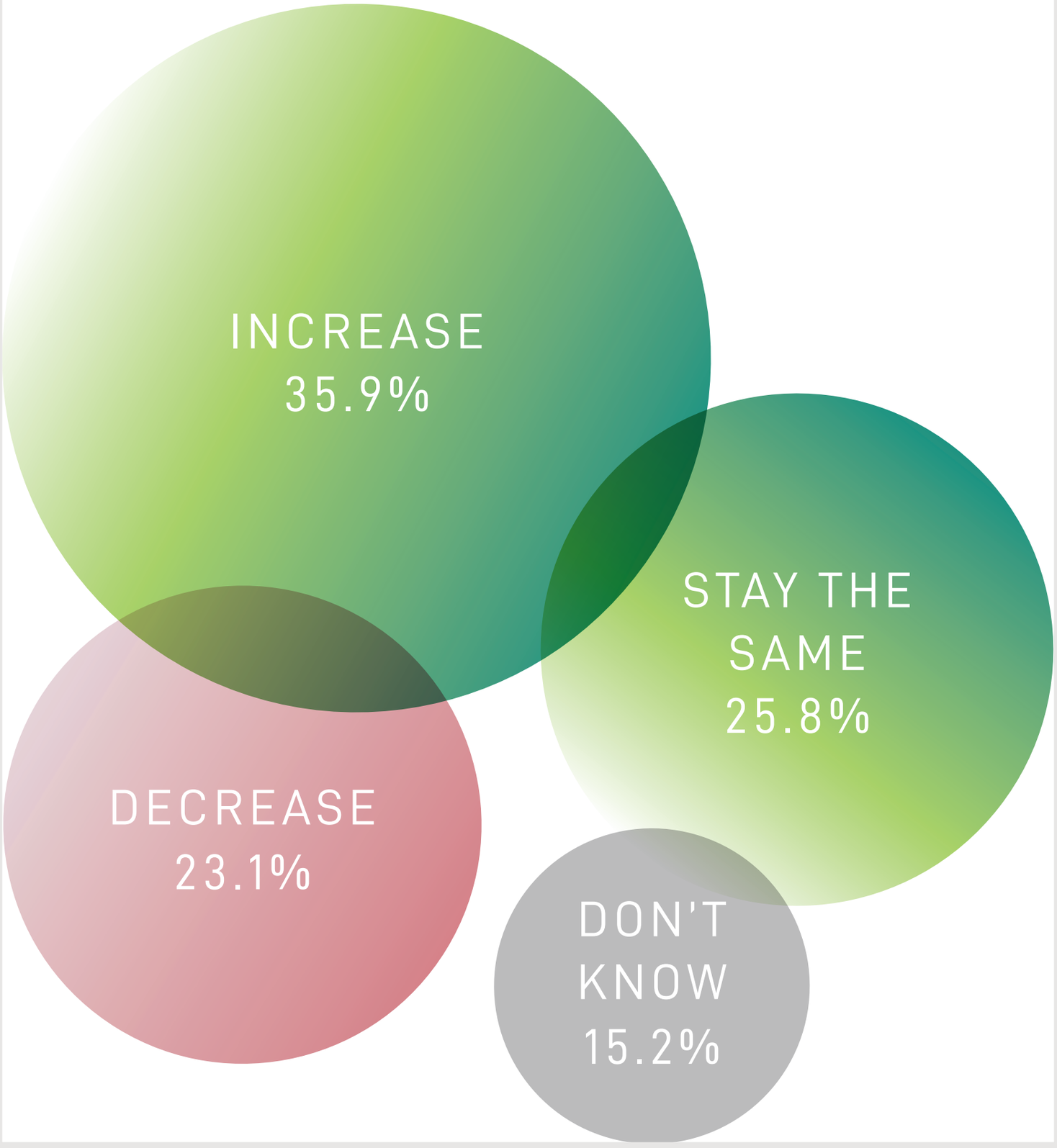
Political POV on Micro-Nuclear Use

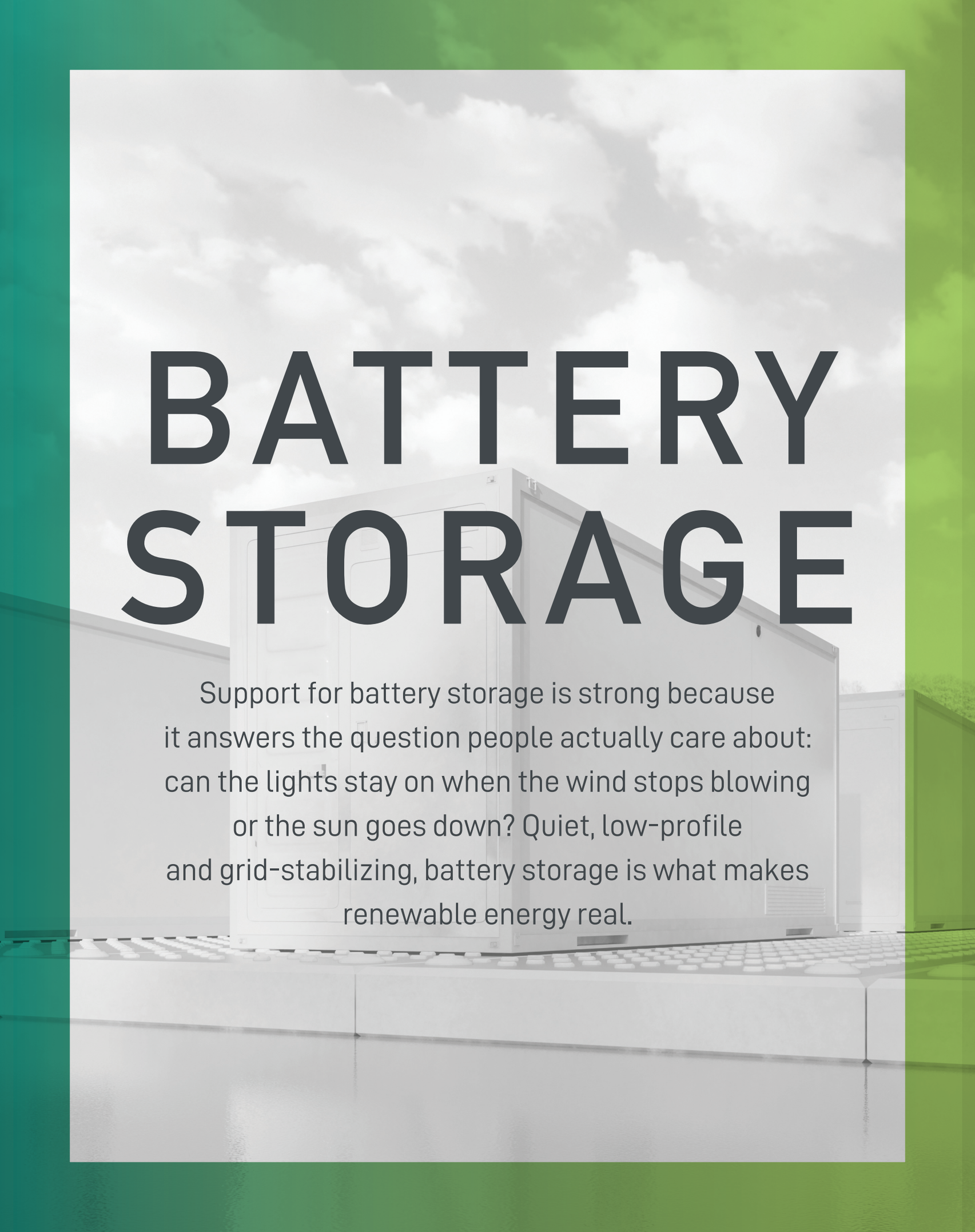
Very Liberal: 37.6%
Very Conservative: 36.1%

Both liberal and conservative respondents are more supportive of micro-nuclear use than the national average.

AMERICANS LEAN TOWARD EXPANDING NUCLEAR ENERGY

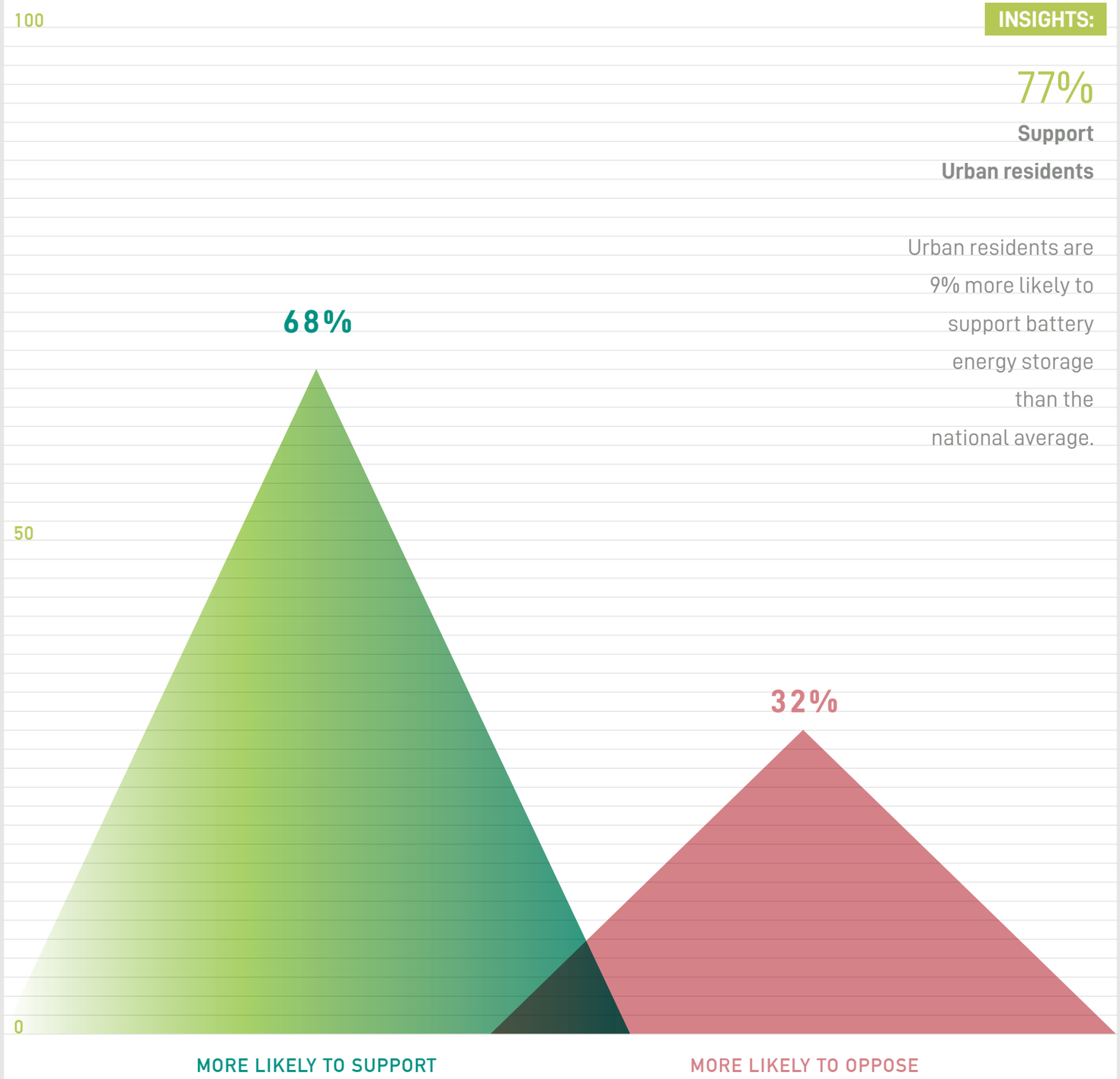
Question: Should the use of nuclear energy in the U.S. increase, decrease or stay the same?





BATTERY STORAGE

Support for battery storage is strong because it answers the question people actually care about: can the lights stay on when the wind stops blowing or the sun goes down? Quiet, low-profile and grid-stabilizing, battery storage is what makes renewable energy real.



INSIGHTS:

77%

Support

Urban residents

Urban residents are 9% more likely to support battery energy storage than the national average.

PRE PERSUASION: BATTERY STORAGE PROJECT

Question: From what you know, or your impression, are you SUPPORTIVE or OPPOSED to utilizing battery storage facilities to store energy in your community?

MESSAGE ACCEPTANCE FOR BATTERY STORAGE IN YOUR REGION

TOTAL MORE LIKELY TO SUPPORT

Battery storage must follow federal, state and local fire codes.

Battery storage helps renewable energy efficiently power the grid.

Battery storage is a good neighbor (quiet, low visual impact, small footprint, no extra traffic).

Battery storage adds reliability to a local grid, reducing black outs.

It is an economic driver providing jobs, tax revenue and local construction spending.

It is the private property owner's choice to lease land for a storage facility.

Question: Please answer if the following statement would make you MORE LIKELY TO SUPPORT or MORE LIKELY TO OPPOSE a battery storage facility.

TOTAL MORE LIKELY TO OPPOSE

49%

Batteries used for storage are made of toxic chemicals.

44%

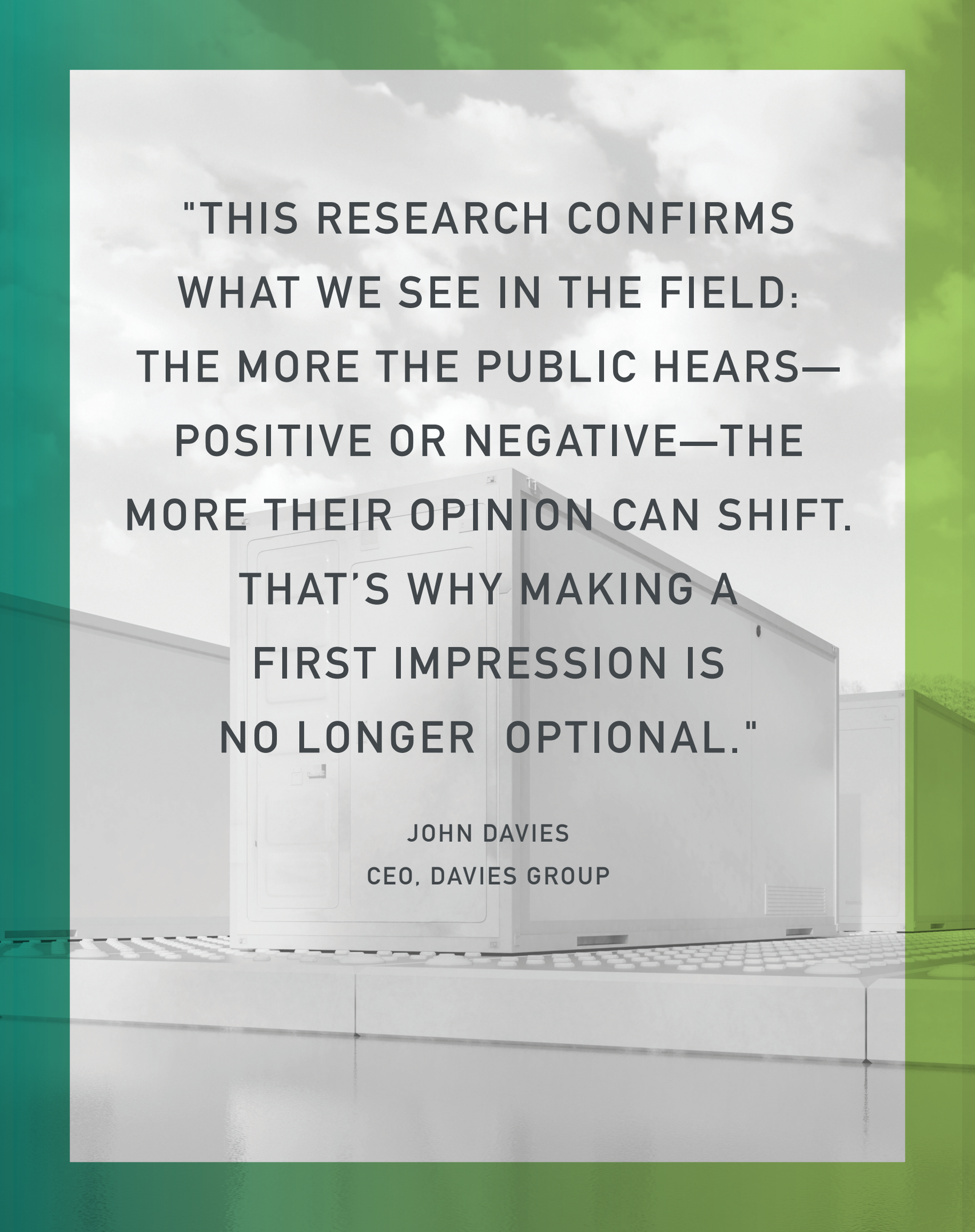
In the past, there was a risk of battery fires.

37%

Battery storage buildings could be an eyesore in the community.

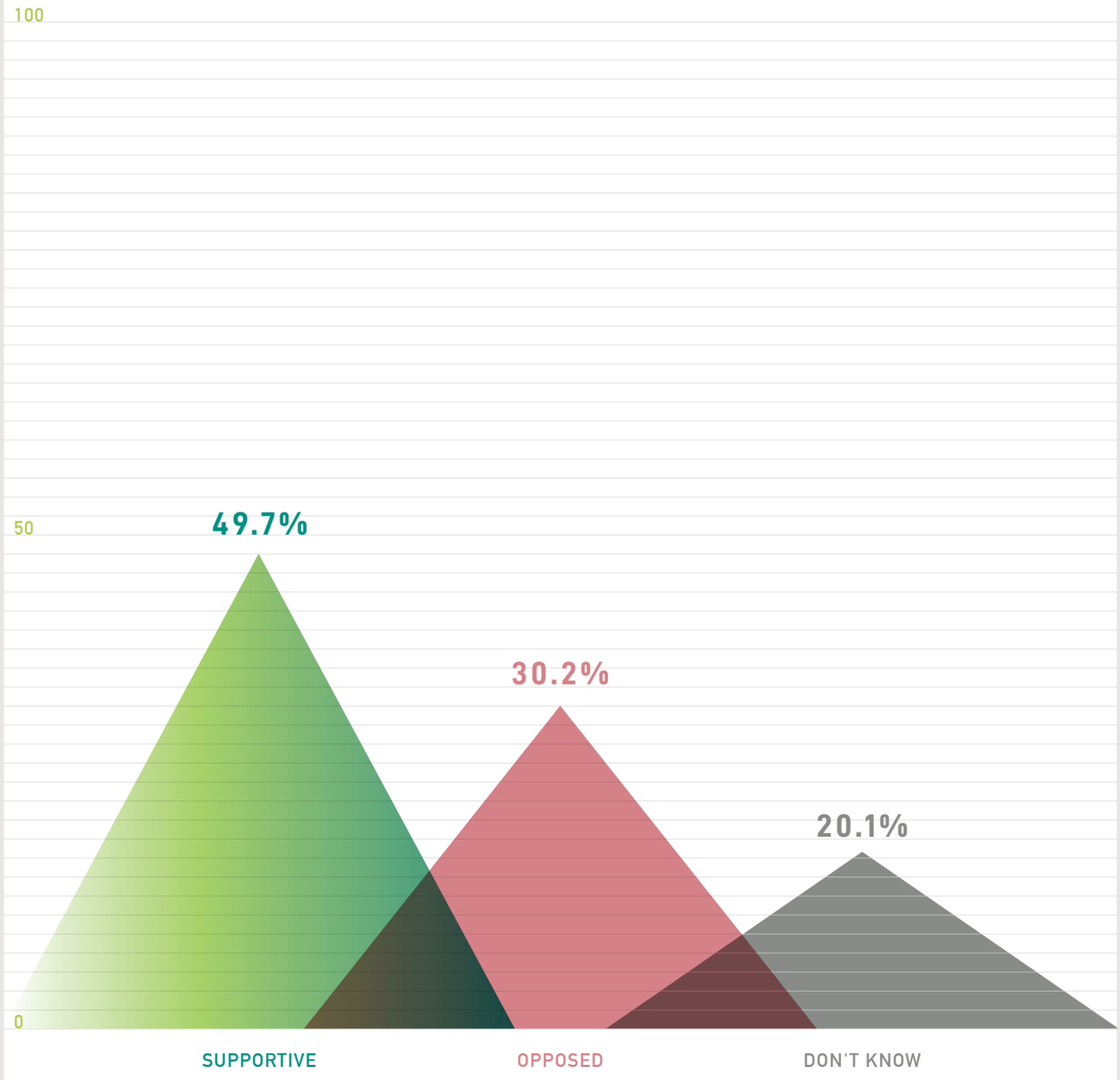
35%

A battery facility could impact values of neighboring properties.



"THIS RESEARCH CONFIRMS WHAT WE SEE IN THE FIELD: THE MORE THE PUBLIC HEARS—POSITIVE OR NEGATIVE—THE MORE THEIR OPINION CAN SHIFT. THAT'S WHY MAKING A FIRST IMPRESSION IS NO LONGER OPTIONAL."

JOHN DAVIES
CEO, DAVIES GROUP

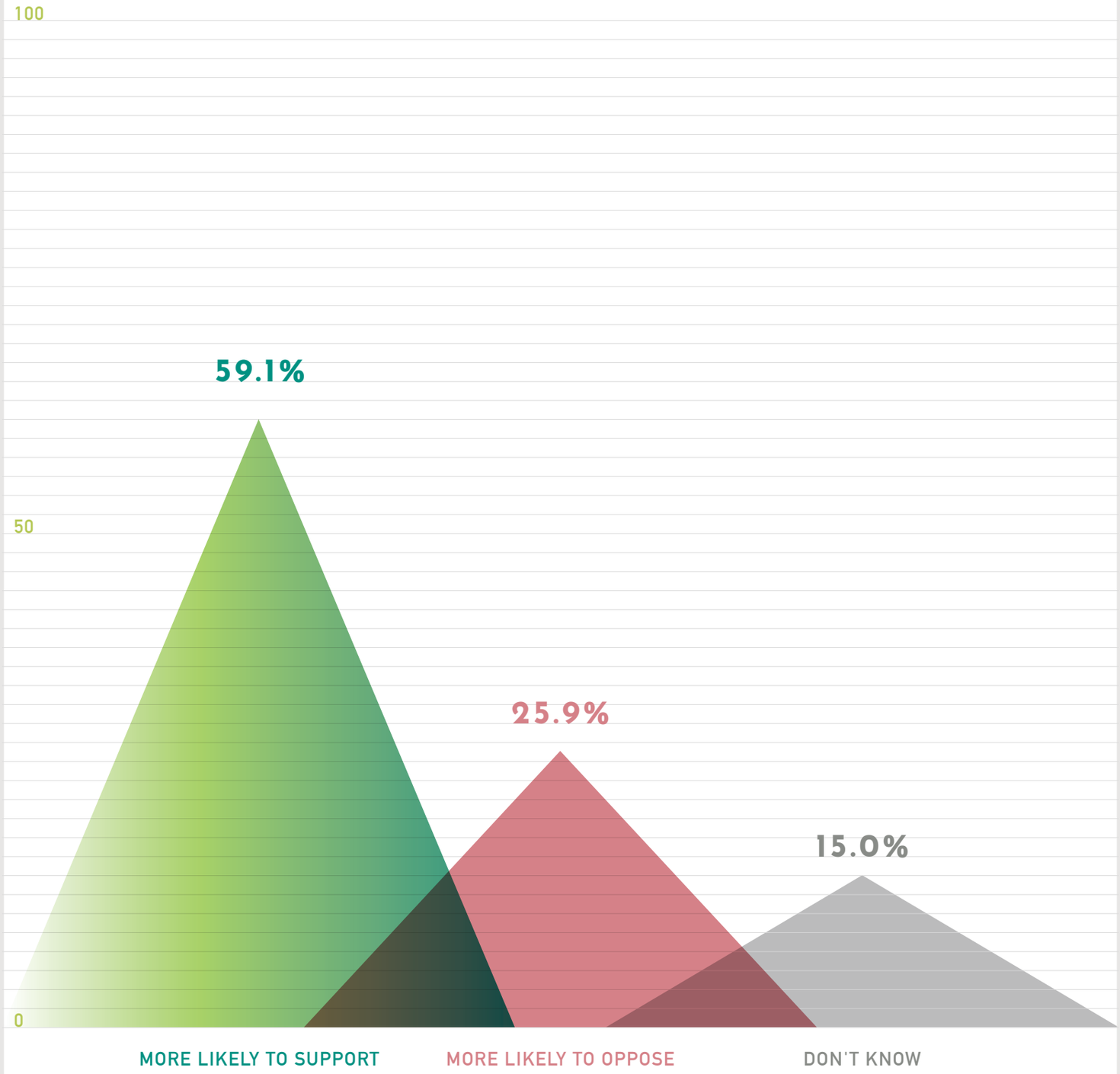


POST PERSUASION: BATTERY STORAGE PROJECT

Question: Now that you know more about battery storage, are you SUPPORTIVE or OPPOSED to utilzing battery storage facilities?

WIND

Wind energy commands wide support, especially when people understand the local economic benefits. But visual impact and land use concerns still drive opposition unless addressed early and directly.



PRE PERSUASION: WIND FARM

Question: If a wind farm was proposed in your region (assuming there was enough wind), would you be MORE LIKELY TO SUPPORT it or MORE LIKELY TO OPPOSE it?

MESSAGE ACCEPTANCE FOR WIND FARMS IN YOUR REGION

TOTAL MORE LIKELY TO SUPPORT

Wind farms can diversify and strengthen the energy grid.

Wind farms now cost less than traditional energy sources.

Wind farms operate without air or water pollution.

Wind farms are a good neighbor (quiet, no real traffic) compared to other types of developments.

Wind energy is American made and independent.

Wind farms provide substantial annual tax revenue along with jobs and local construction spending.

Question: Please answer if the following statement would make you MORE LIKELY TO SUPPORT or MORE LIKELY TO OPPOSE a wind energy facility.

TOTAL MORE LIKELY TO OPPOSE

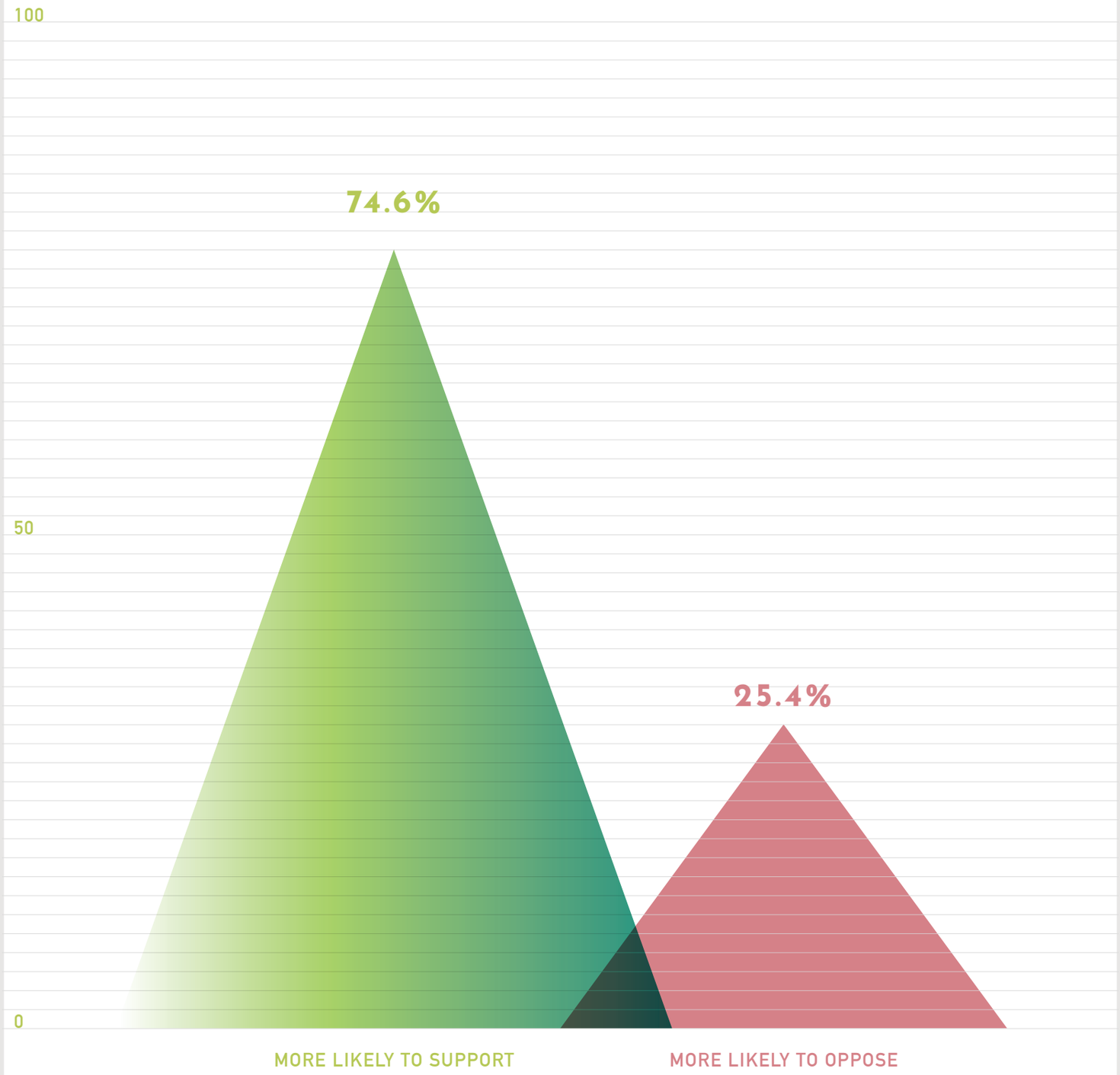
Wind farms can disrupt local wildlife and ecosystems.

Wind farms can cause shadow flicker.

Wind farms can impact scenic views and local tourism.

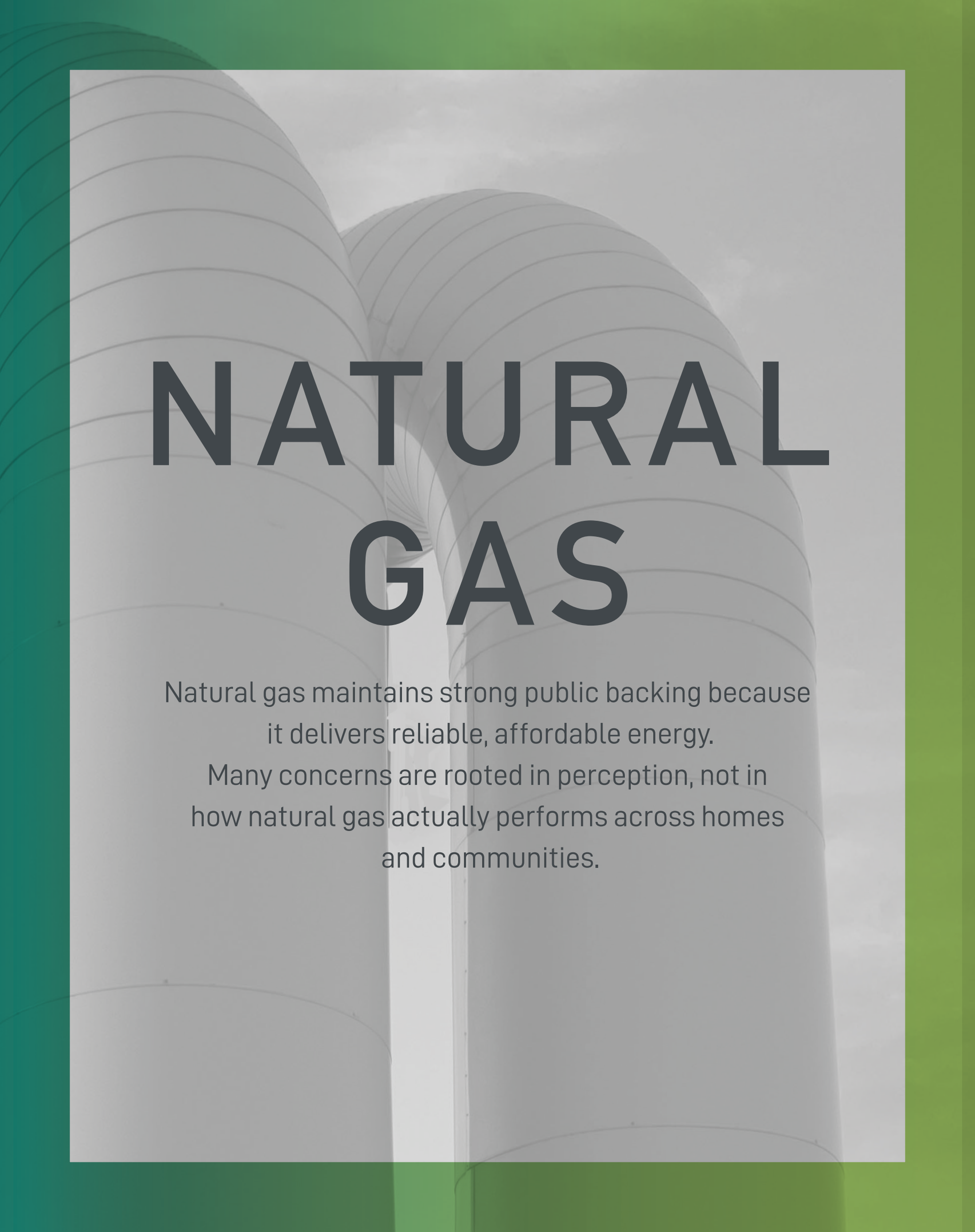
"THE WIND IS AN UNHARNESSED FORCE; AND QUITE POSSIBLY ONE OF THE GREATEST DISCOVERIES WILL BE THE TAMING, AND HARNESSING, OF THE WIND."

-ABRAHAM LINCOLN



POST PERSUASION: WIND FARM

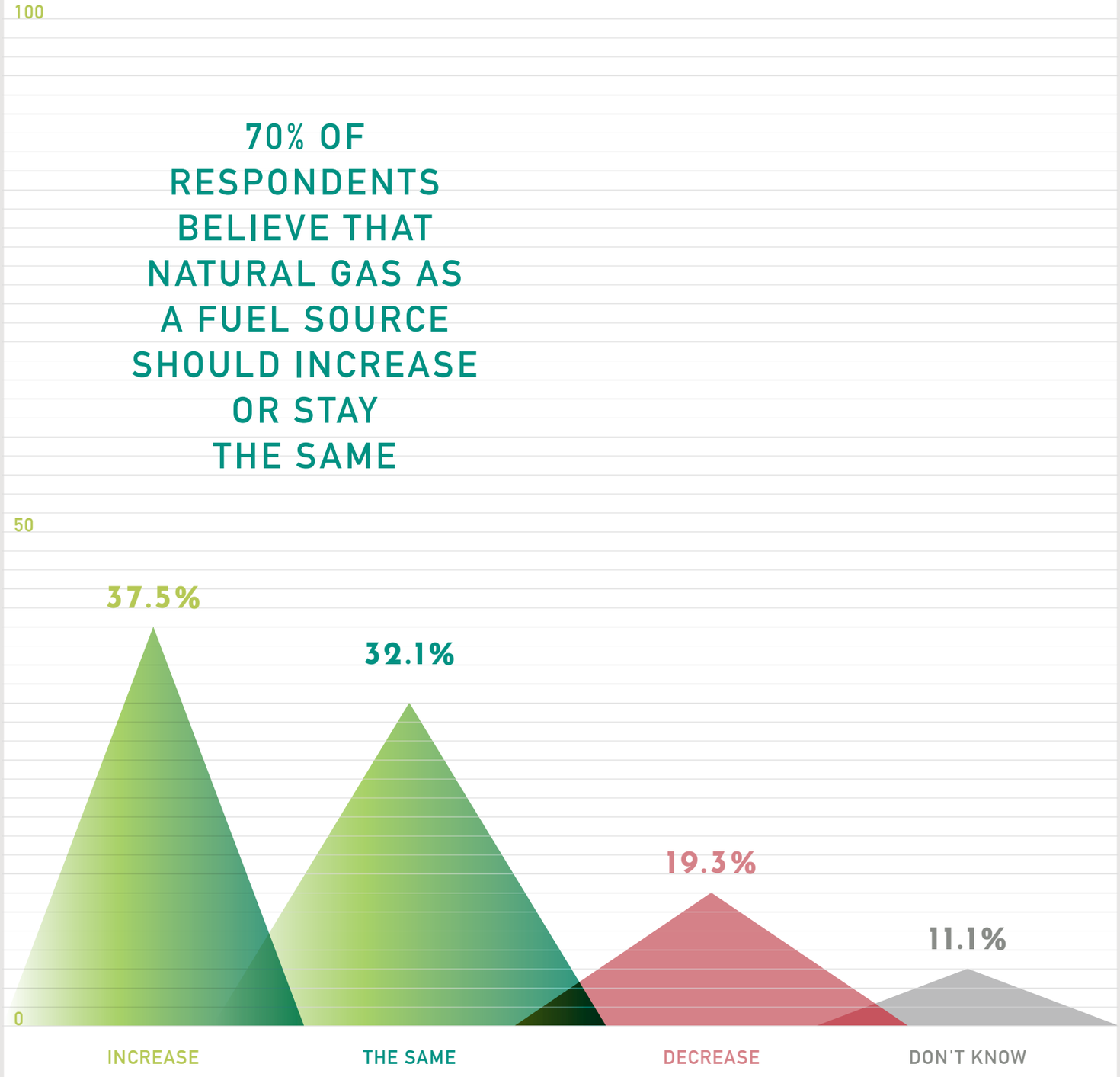
Question: Now that you know more about wind farms, are you SUPPORTIVE or OPPOSED to utilizing a wind energy facility?



NATURAL GAS

Natural gas maintains strong public backing because it delivers reliable, affordable energy. Many concerns are rooted in perception, not in how natural gas actually performs across homes and communities.

70% OF RESPONDENTS BELIEVE THAT NATURAL GAS AS A FUEL SOURCE SHOULD INCREASE OR STAY THE SAME

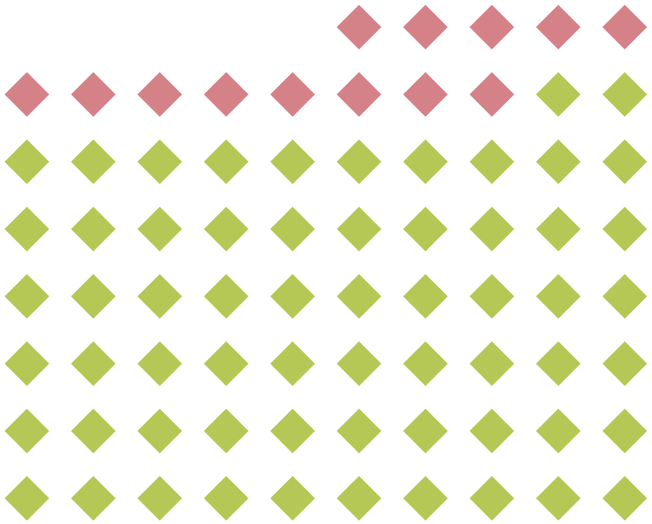


PRE PERSUASION: NATURAL GAS

Question: Should the use of natural gas as a fuel source INCREASE, DECREASE or STAY THE SAME?

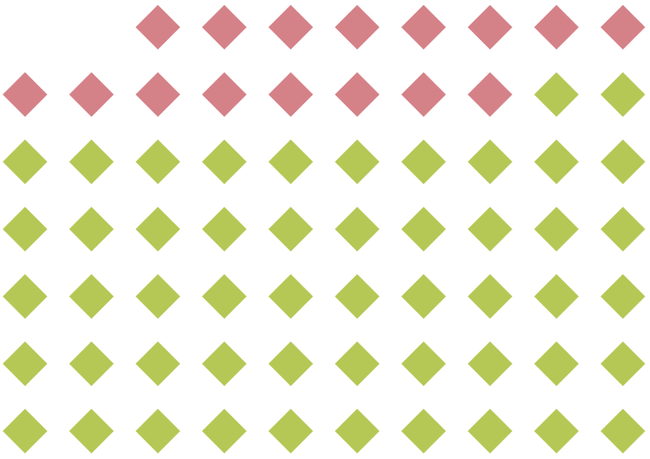
PERCEPTION: NATURAL GAS USAGE

Question: Reading the following statements, does this make you MORE LIKELY or LESS LIKELY to OPPOSE or SUPPORT the use of natural gas for energy generation.



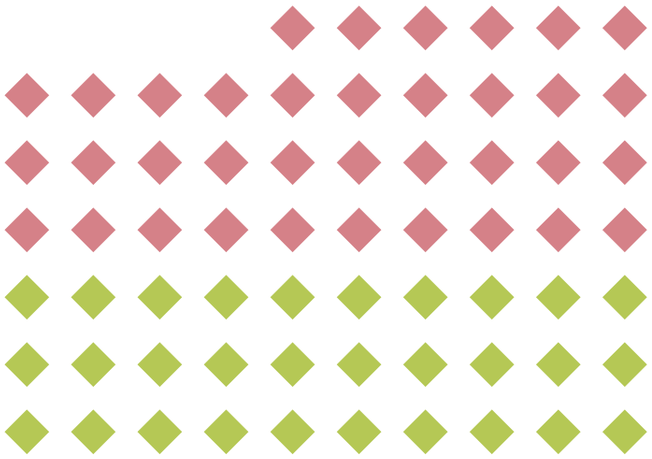
62% SUPPORT | 13% OPPOSE

Households that use natural gas for heating, cooking and clothes drying save an average of $874 per year compared to homes using electricity for those applications.



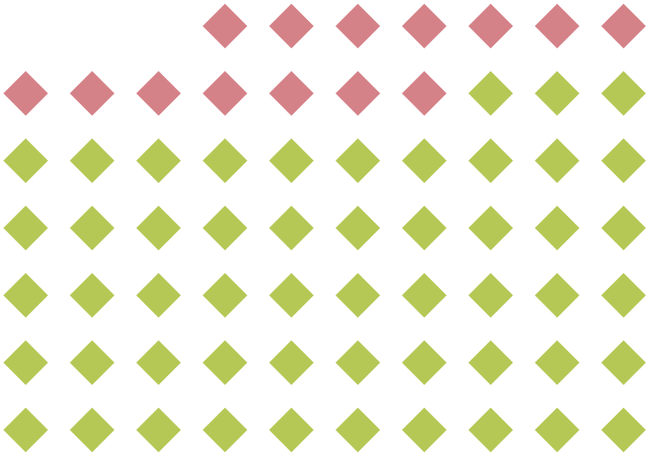
53% SUPPORT | 15% OPPOSE

During the shale revolution, the U.S. led the world in emissions reductions, as natural gas replaced coal accounting for a majority of all emissions reductions nationwide.



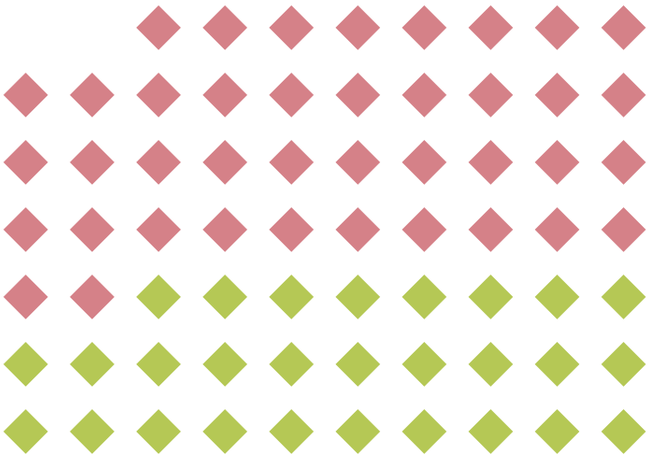
30% SUPPORT | 36% OPPOSE

The use of natural gas stoves in homes can lead to pollutants escaping the cooking area and harming the indoor air quality, if not properly ventilated.



53% SUPPORT | 14% OPPOSE

In the U.S. between 2007and 2020, we have seen a 20% increase in natural gas utilization and 25% decrease in emissions from power.

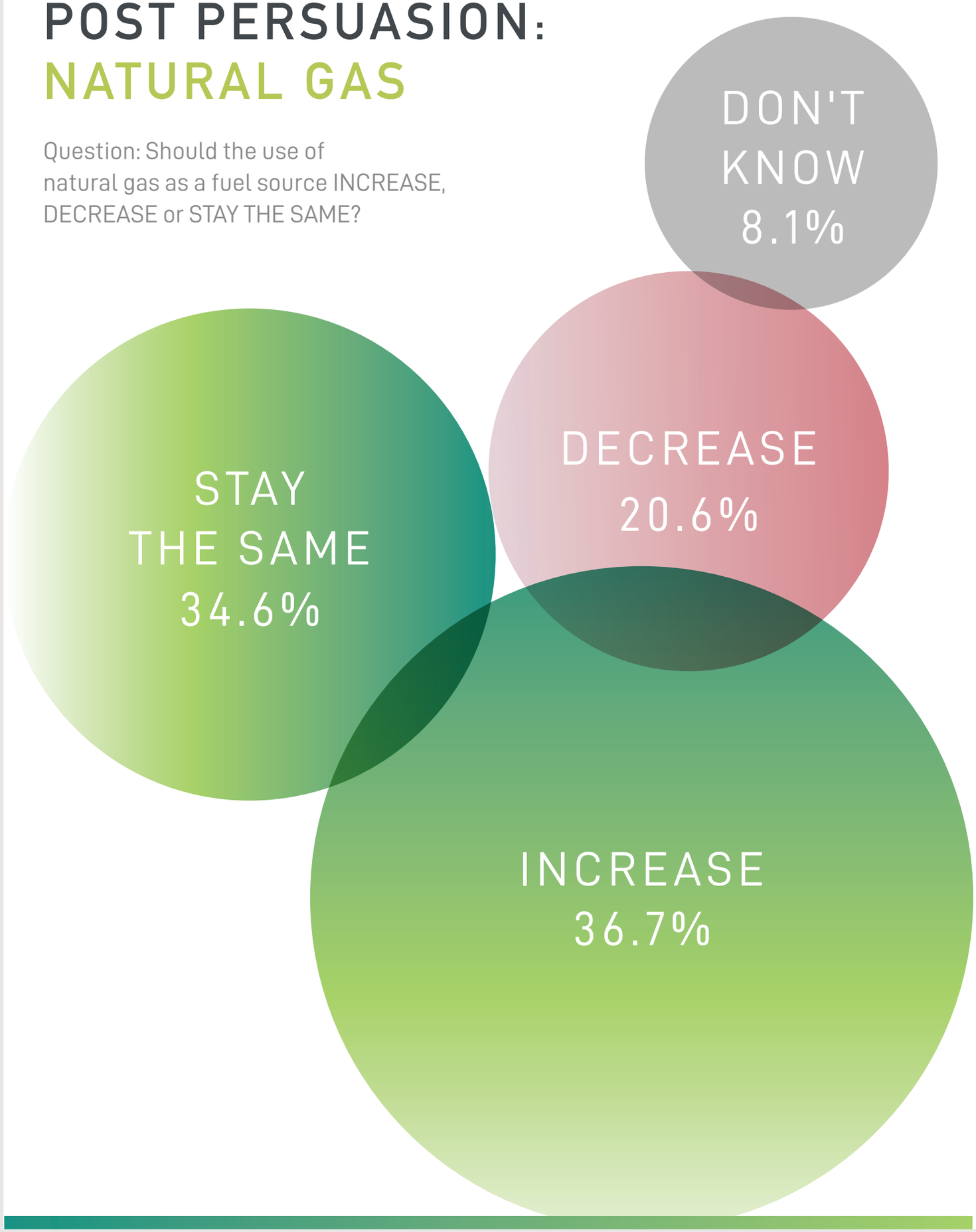


28% SUPPORT | 40% OPPOSE

Methane leaks from natural gas are much more carbon intensive than CO2 and make it just as bad, or worse, than coal.

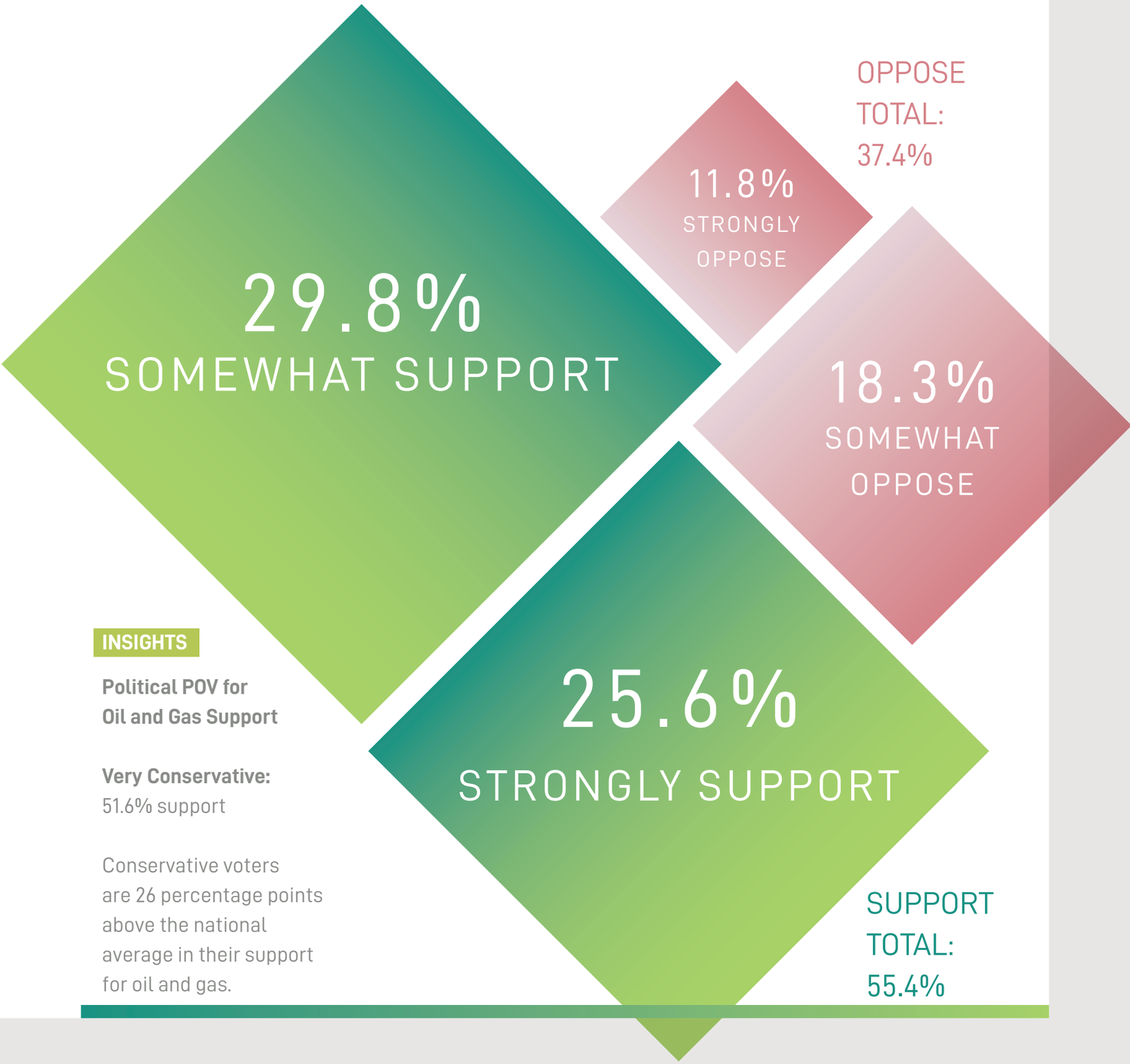
POST PERSUASION:
NATURAL GAS

Question: Should the use of natural gas as a fuel source INCREASE, DECREASE or STAY THE SAME?



55% CONTINUED SUPPORT USE OF OIL AND GAS

Question: From what you know or your impression, are you supportive or opposed to continuing the use of oil and gas for domestic energy production?



INSIGHTS

Political POV for Oil and Gas Support

Very Conservative: 51.6% support

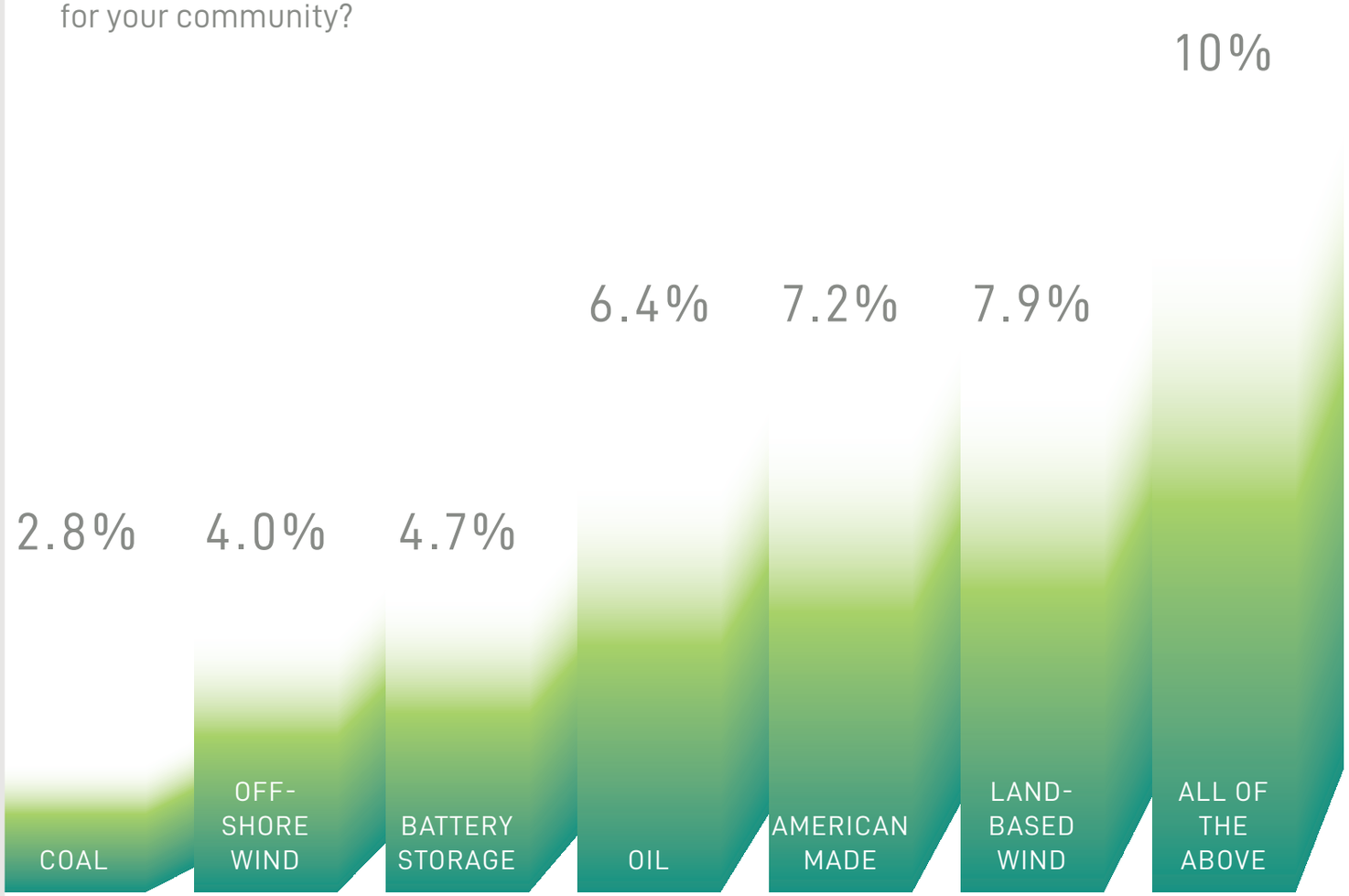
Conservative voters are 26 percentage points above the national average in their support for oil and gas.

SOLAR IS BY FAR THE MOST PREFERRED ENERGY SOURCE

Question: After the information shared today, which is your preferred energy generation method for your community?

INSIGHTS

Solar was the preferred energy source in all the regions EXCEPT New England.

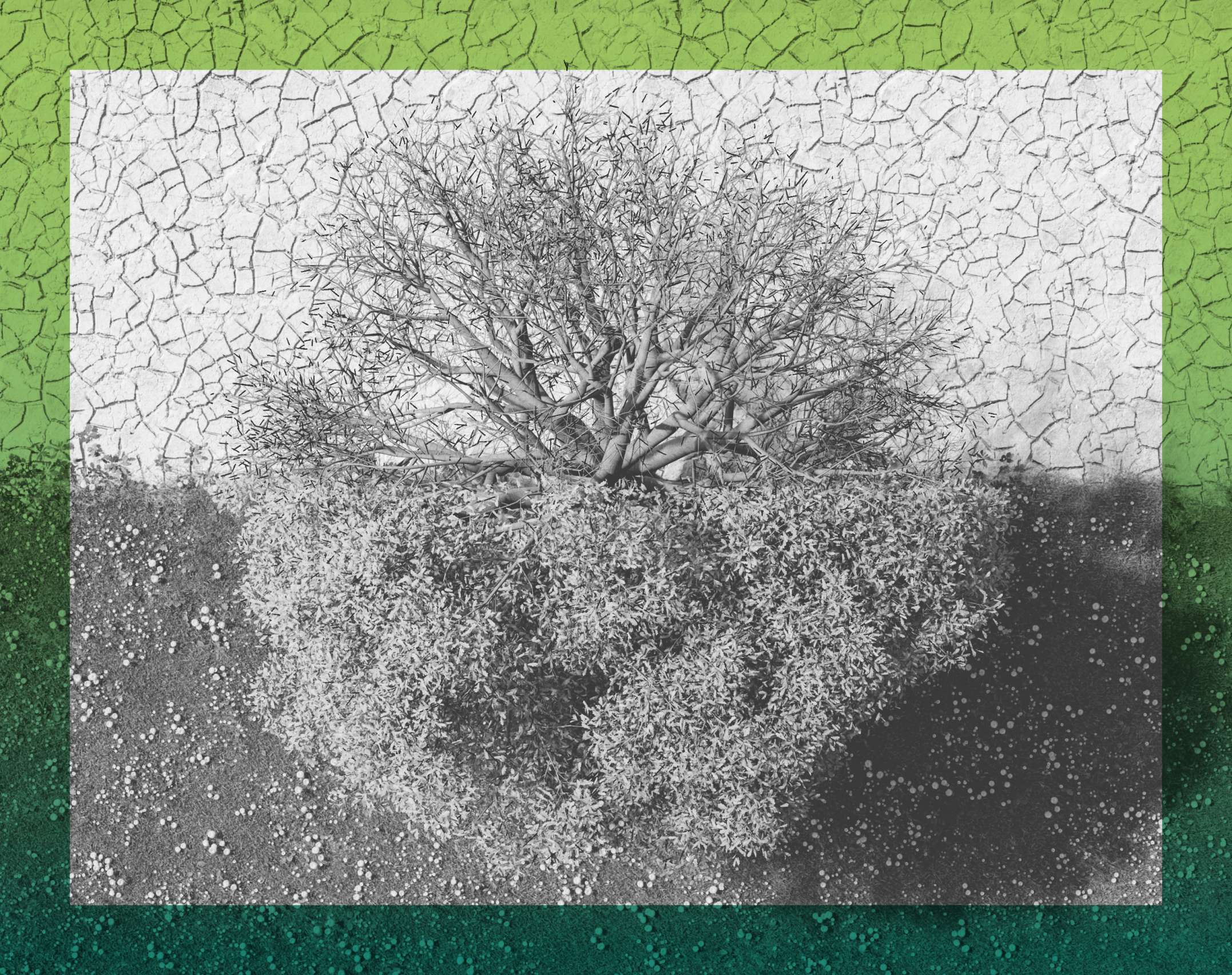


POST ENERGY PREPAREDNESS

Question: Now, given that information, do you believe the U.S. is prepared to handle the energy needs of the future?

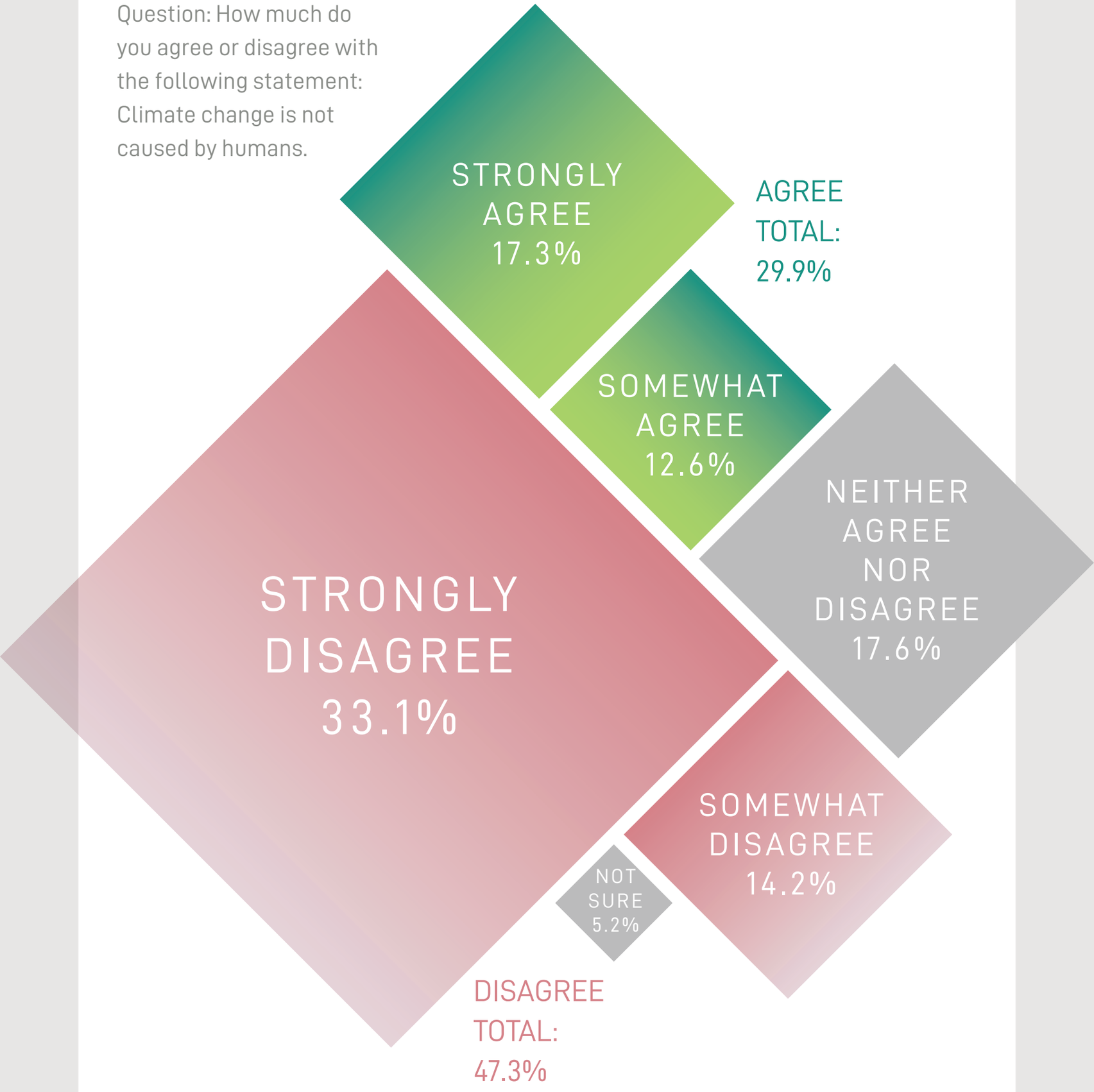
YES
41.7%

NO
31.8%



CLIMATE CHANGE BELIEF

Question: How much do you agree or disagree with the following statement: Climate change is not caused by humans.



HOW TO PREPARE FOR FUTURE ENERGY DEMAND

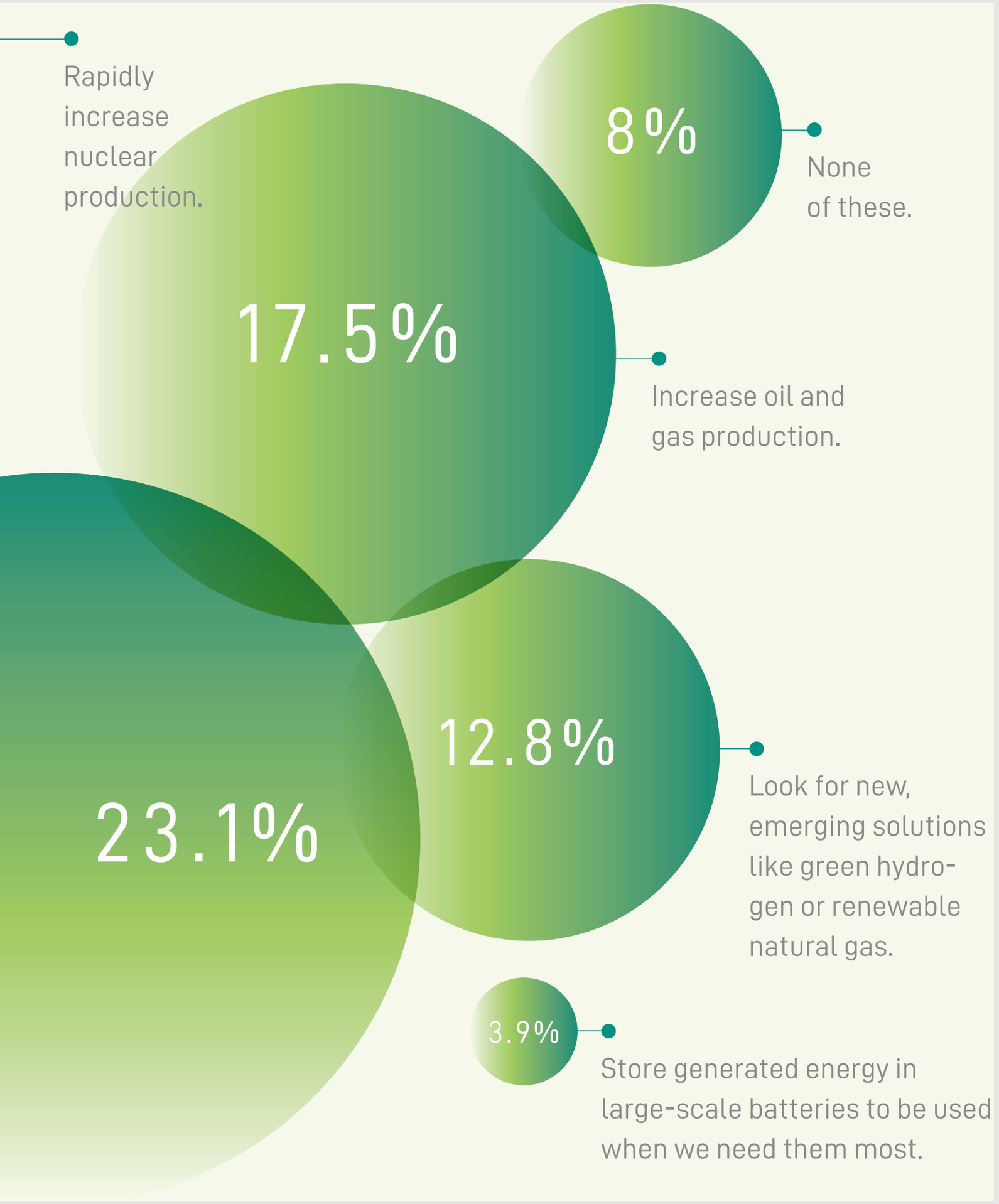
Question: What do you think is the best way to prepare for future energy demand?

7.2%

24.7%

Increase all energy generation sources - from oil and gas to renewables, to have a diverse mix of oil and gas, and renewables.

Rapidly increase renewable generation like wind and solar.


Rapidly increase nuclear production.
8%
None of these.
17.5%
Increase oil and gas production.
12.8%
Look for new, emerging solutions like green hydrogen or renewable natural gas.
23.1%
3.9%
Store generated energy in large-scale batteries to be used when we need them most.

IF RESULTS ARE SO POSITIVE
WHY DO WE FACE SO MUCH OPPOSITION?

THE THREE FEARS OF NIMBYS DRIVE OPPOSITION

1

FEAR OF THE UNKNOWN

2

FEAR OF INSIGNIFICANCE

3

FEAR OF CHANGE

"The three fears drive local concern and opposition. Residents fear change in their community; the feeling of insignificance as they feel they do not have a say in what comes into their hometowns and of the unknown. The fear of the unknown is often exacerbated by the news media that highlights controversy and infrequent safety issues, often shaping public perceptions. At Davies, we work to inoculate your project from all three of these fears before they foment and cause opposition."

-JOHN DAVIES
CEO, DAVIES GROUP

APPEASING OPPOSING POLITICAL POV

A person's political viewpoint shapes their understandiang and level of acceptance of renewable energy generation. Renewables are often associated with the Democratic Party and its "climate agenda," causing Republicans to quickly knee-jerk against renewable projects.

THE COMPANY WE KEEP

Our results speak for themselves. Here are some
of the industry leaders who trust us.

We have been honored to work with some of the finest partners in the energy sector. Our approach is grounded in absolute ownership, strategic insight, tactical excellence and trusted partnership. These principles guide every decision we make and every outcome we deliver.

Vestas®

GRIDSTOR

EnergySource Minerals

Calpine

e·on

Horizon Wind Energy
An EDP Renewables Company

Bedrock Renewables

MATRIX RENEWABLES

ILiAD TECHNOLOGIES

PRC WIND

acciona

Invenergy

FPL

aes

TECO
TAMPA ELECTRIC
AN EMERA COMPANY

PG&E Pacific Gas and Electric Company

Dominion Energy

Origis Energy®

EDF renewables

Hecate Grid

HOW DAVIES CAN HELP

As a national leader in renewable energy messaging, strategic communications and community research and engagement, we help companies overcome public challenges by telling your story in a compelling and factual way. Most importantly, we help your project resonate with your target audience. We address and allay concerns, build upon hopes and dreams and educate in an easy-to-understand, straightforward way, with a message tailor-made for your specific audience.

We use that message to create industry-leading communication resources which can then be used to engage the community, find supporters and ultimately earn approval for your project.

We can help you make a positive first impression and overcome opposition or public challenges to your project.

Let's work together.

OUR SERVICES

At Davies, we offer comprehensive support in issues management, public affairs and crisis communication. Our specialization lies in crafting impactful messages and developing grassroots programs that inspire individuals to supportive voices to take meaningful action. This influence extends to navigating regulatory, permitting and political challenges.

Research
Messaging
Community Outreach
Crisis
Media Relations
Advocacy
Creative
Digital

DAVIES 6 PROVEN STEPS TO PERSUASIVE ENGAGEMENT

1

LISTEN FIRST

Know what others feel or think. Don't tell them what you think.

2

TARGET AUDIENCES

Identify the right audience and tailor outreach to resonate with them.

3

ADDRESS DREAMS & FEARS

It's about their dreams and their fears, not yours.

4

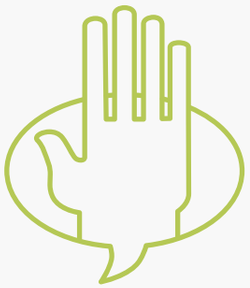
TELL YOUR STORY

Stories connect us emotionally, where facts do not share your best story.

5

CULTIVATE RELATIONSHIPS

Transition from simply supporters into advocates.



6

ASK FOR HELP

Earn commitment to help and then motivate others to stand up for you.

WWW.DAVIESPAGROUP.COM