



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.

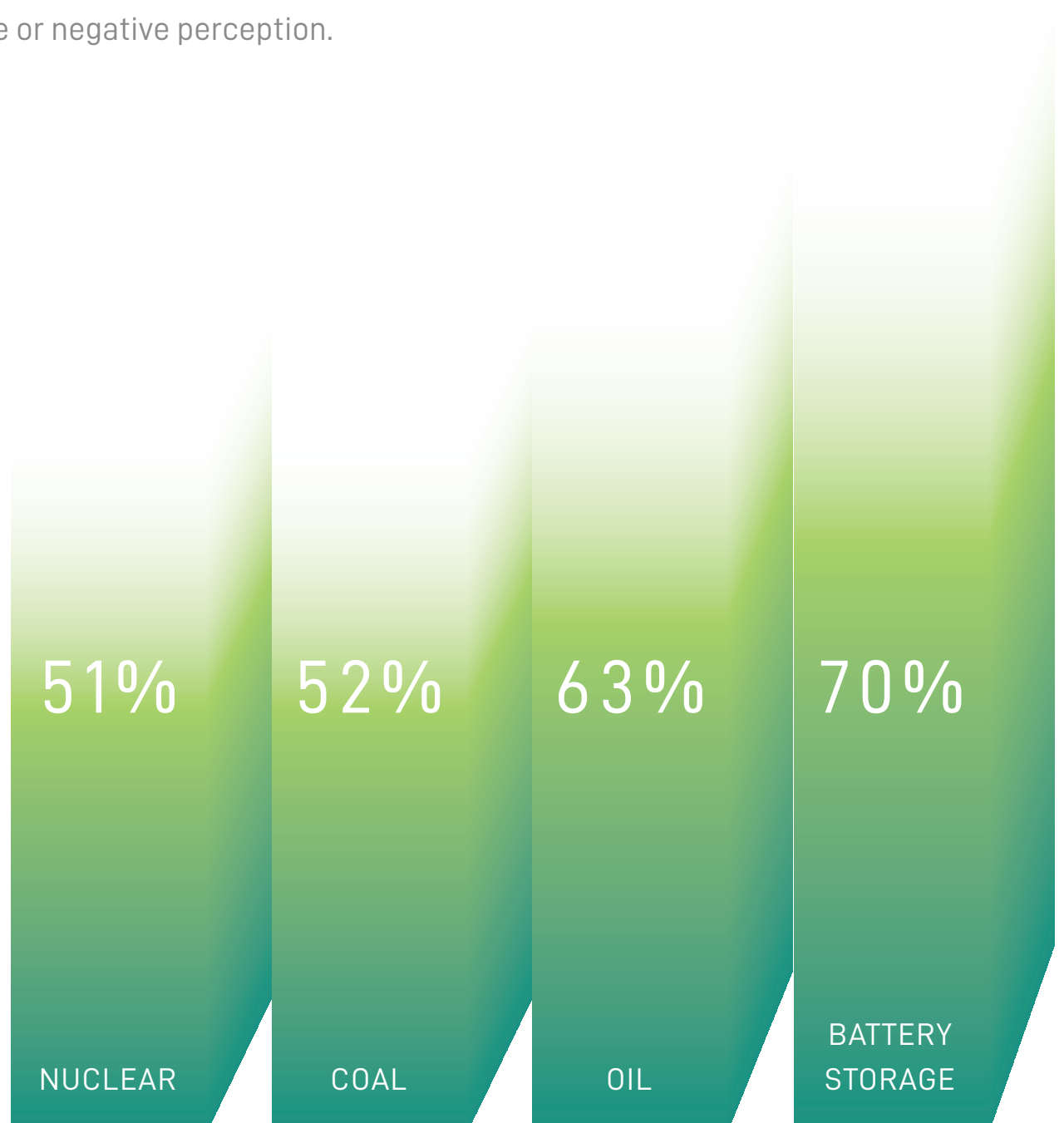


JOHN DAVIES
Chairman + CEO
Davies Group

POSITIVE 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.



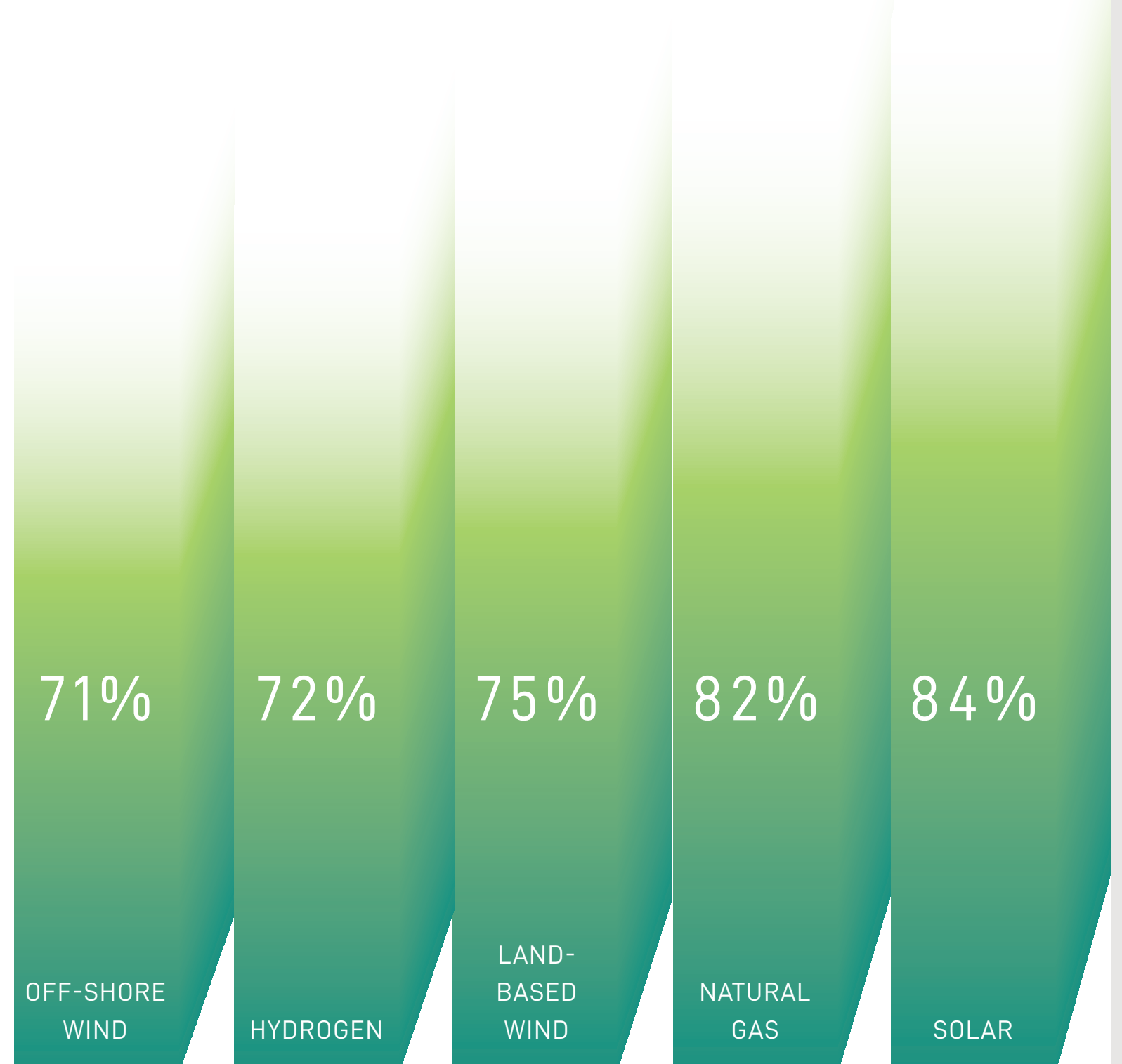
INSIGHTS

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

94.9%
Positive
Perception
of Natural
Gas

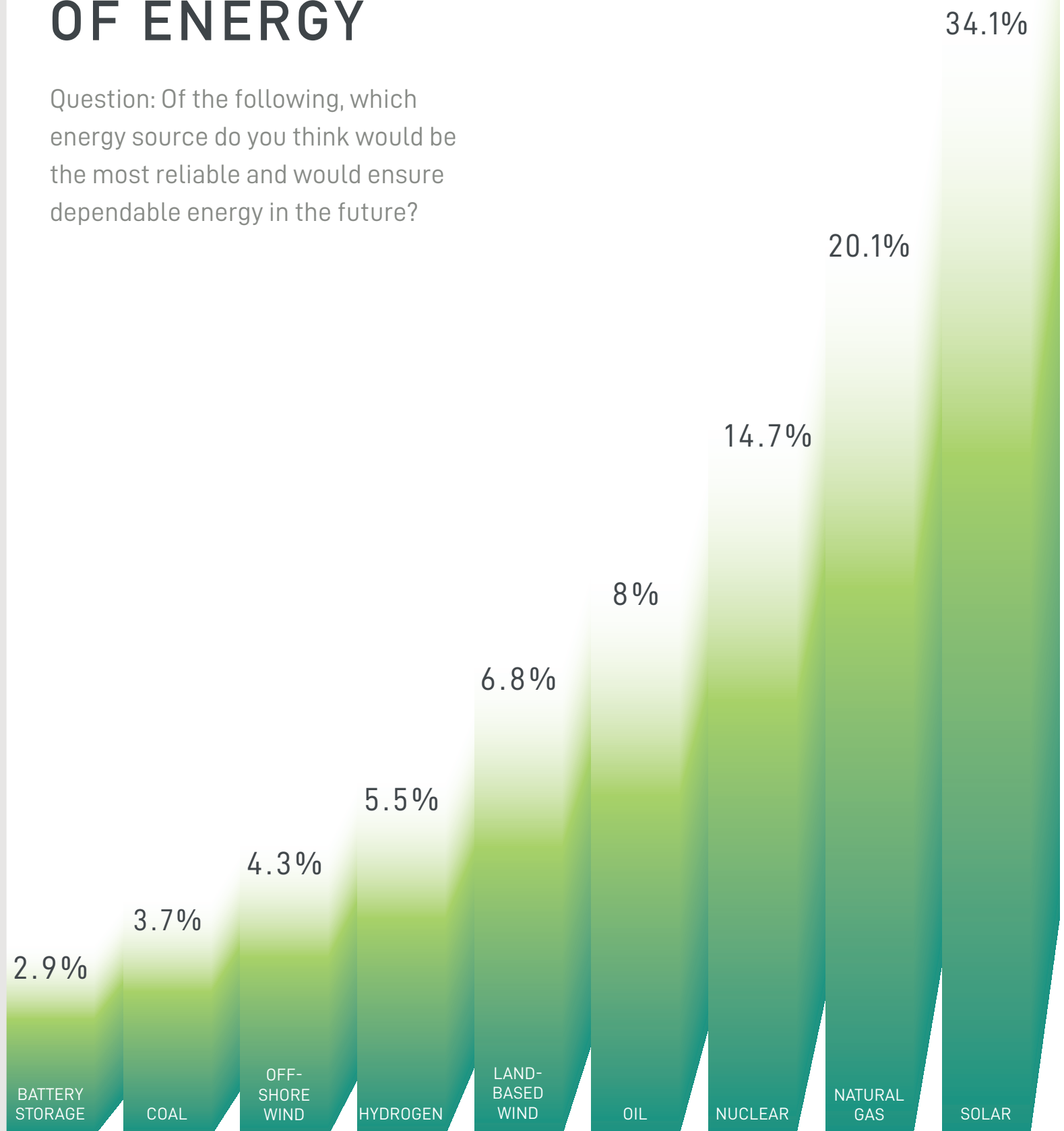
Support for natural
gas in the New
England Region is
especially strong,
with support being
13.8% stronger than
the national average.

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?

52.1%
OIL AND
NATURAL GAS

47.9%
RENEWABLE
ENERGY

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

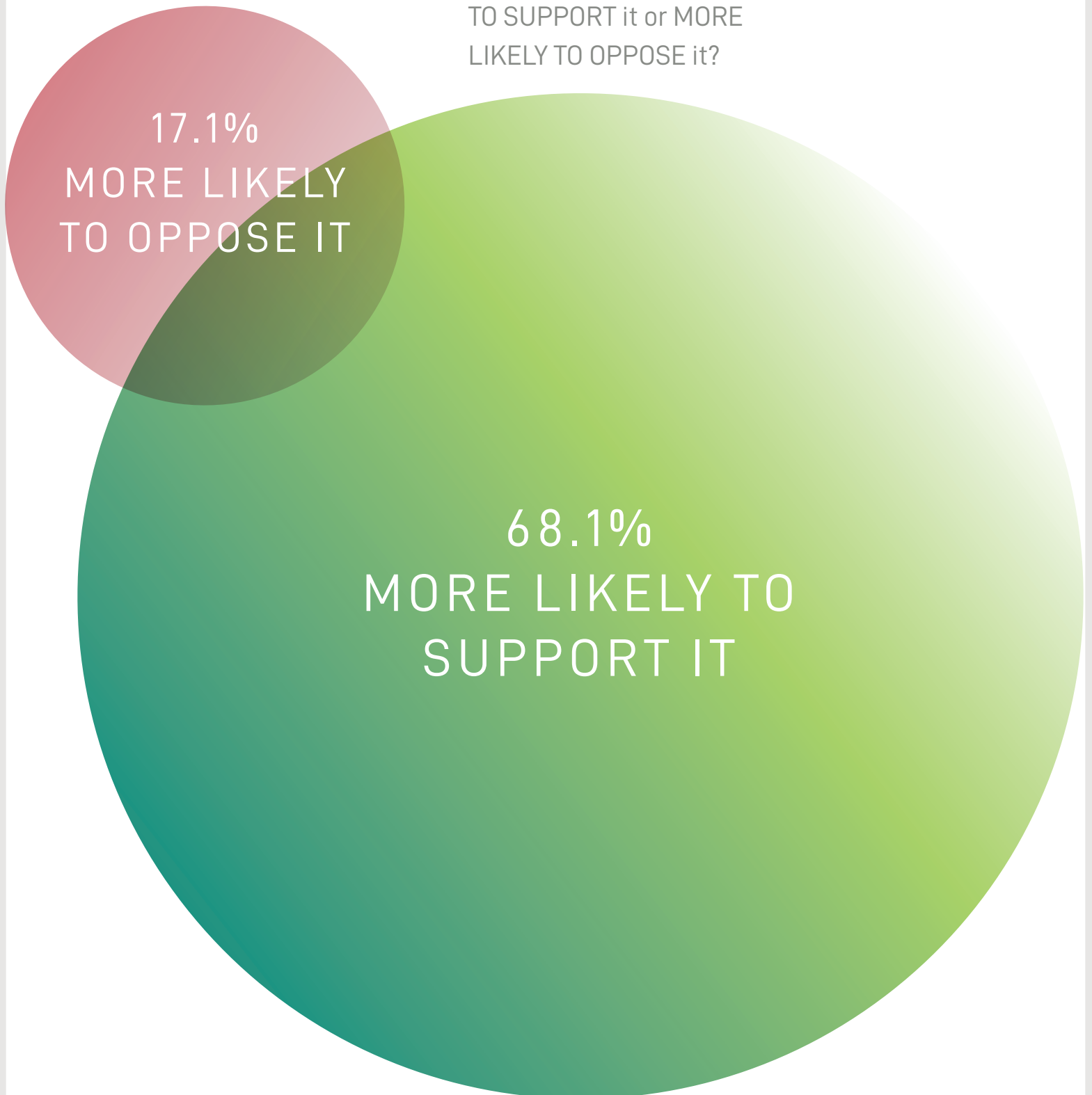
While solar is broadly popular, rural residents are 9 percent more likely to oppose it on agricultural land compared to urban residents.

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.



MESSAGE ACCEPTANCE FOR SOLAR IN YOUR REGION

TOTAL MORE LIKELY TO SUPPORT

64%

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

64%

Solar farms can diversify and strengthen the energy grid.

62%

Solar farms operate with no air or water emissions.

62%

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

61%

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

54%

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

49%

Solar panels are made of toxic materials.

37%

Solar farms could take up valuable agricultural land.

37%

Solar farms reduce property values of neighboring properties.

35%

There is no clear plan for what happens to solar panels or equipment at the end of their life.

32%

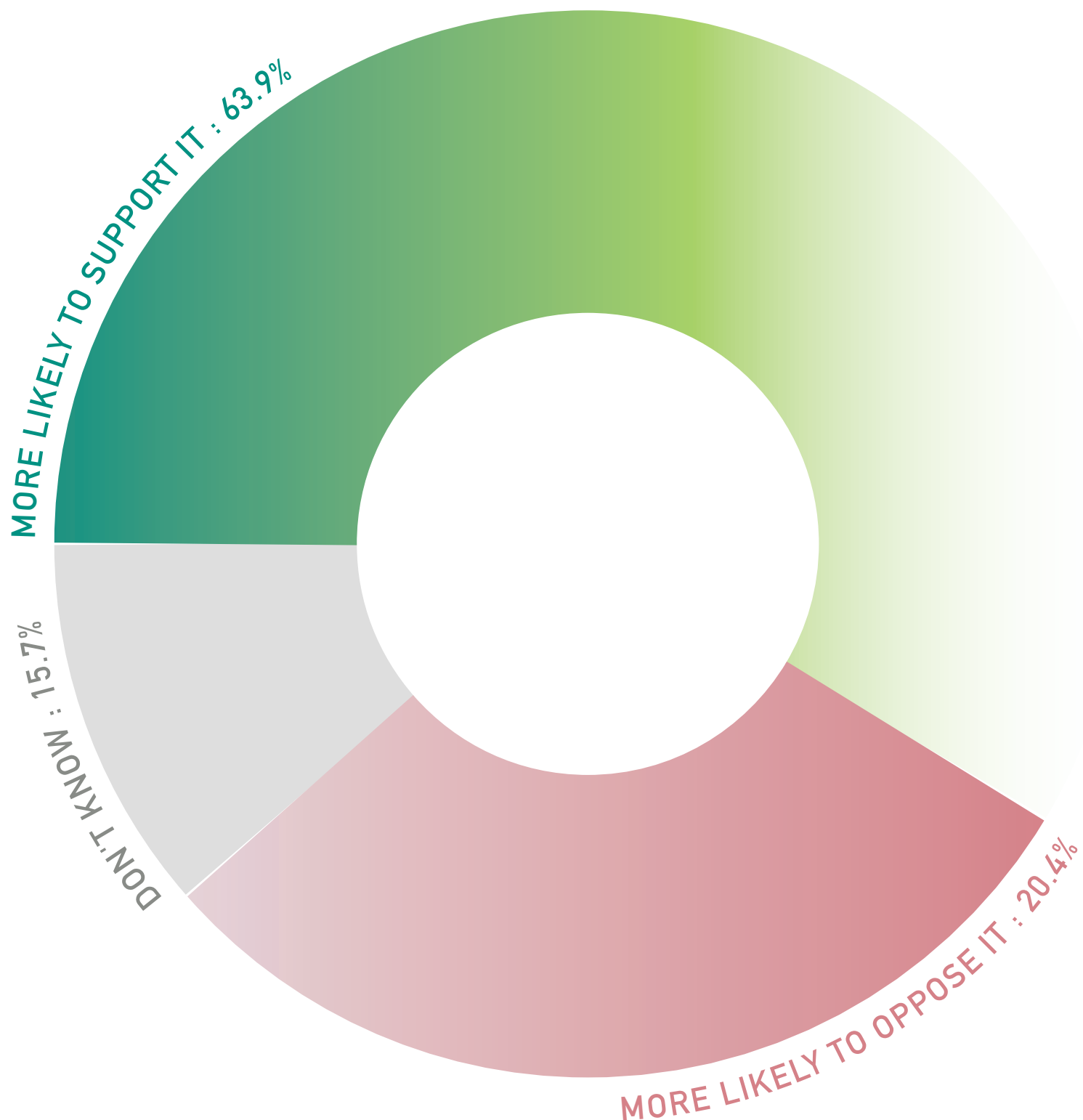
Solar panels are often foreign made.


23%

Solar farms could impact views for others.

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**

A photograph of two large, white, hyperboloid cooling towers of a nuclear power plant. The towers are set against a bright sky with scattered white clouds. The image is framed by a green border on the left and right sides, and a dark green border at the top. The word "NUCLEAR" is superimposed in large, bold, dark grey capital letters across the middle of the image.

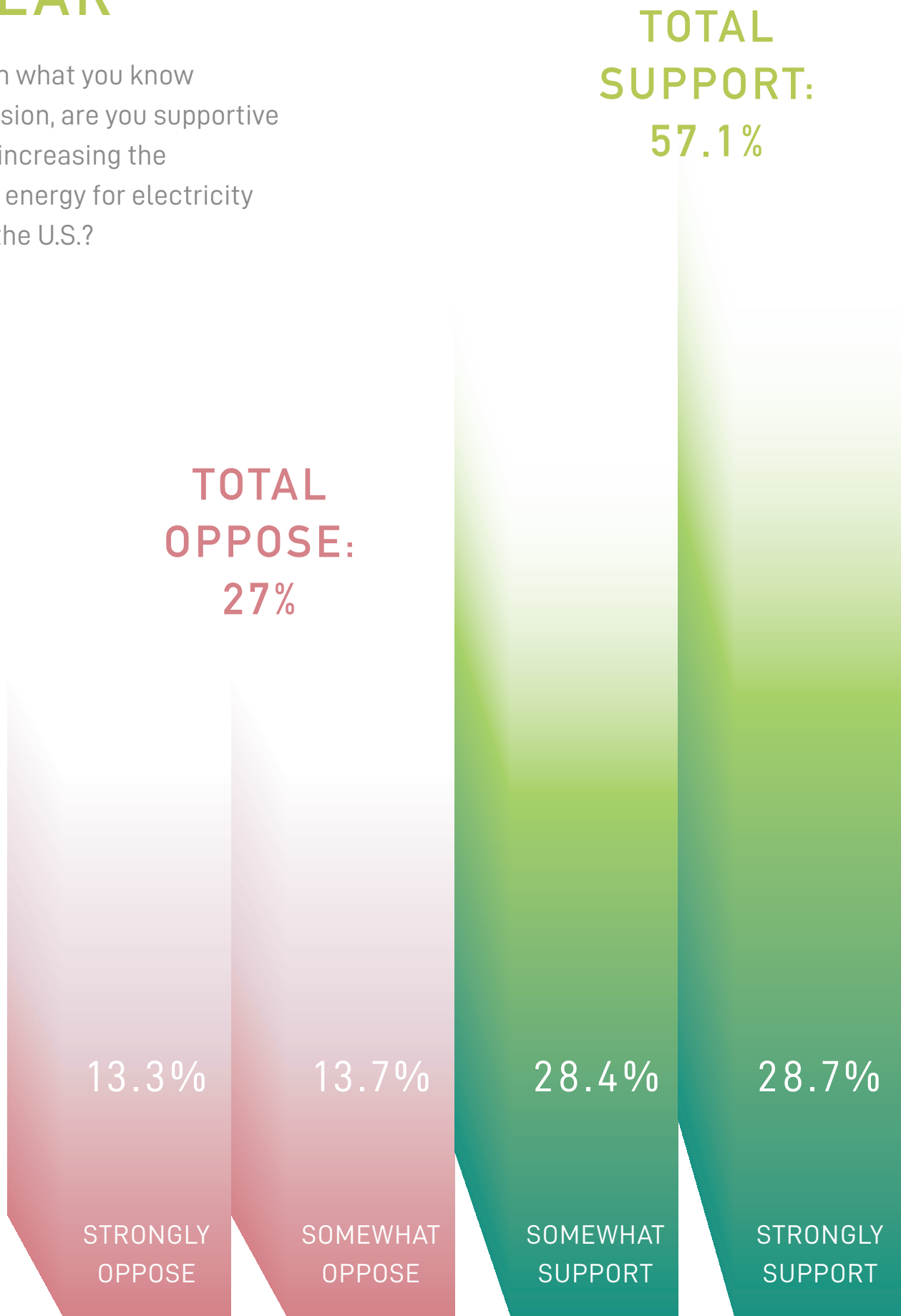
NUCLEAR

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

61%

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

60%

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

59%

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

59%

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

56%

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

43%

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

42%

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

40%


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

35%

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

33%

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

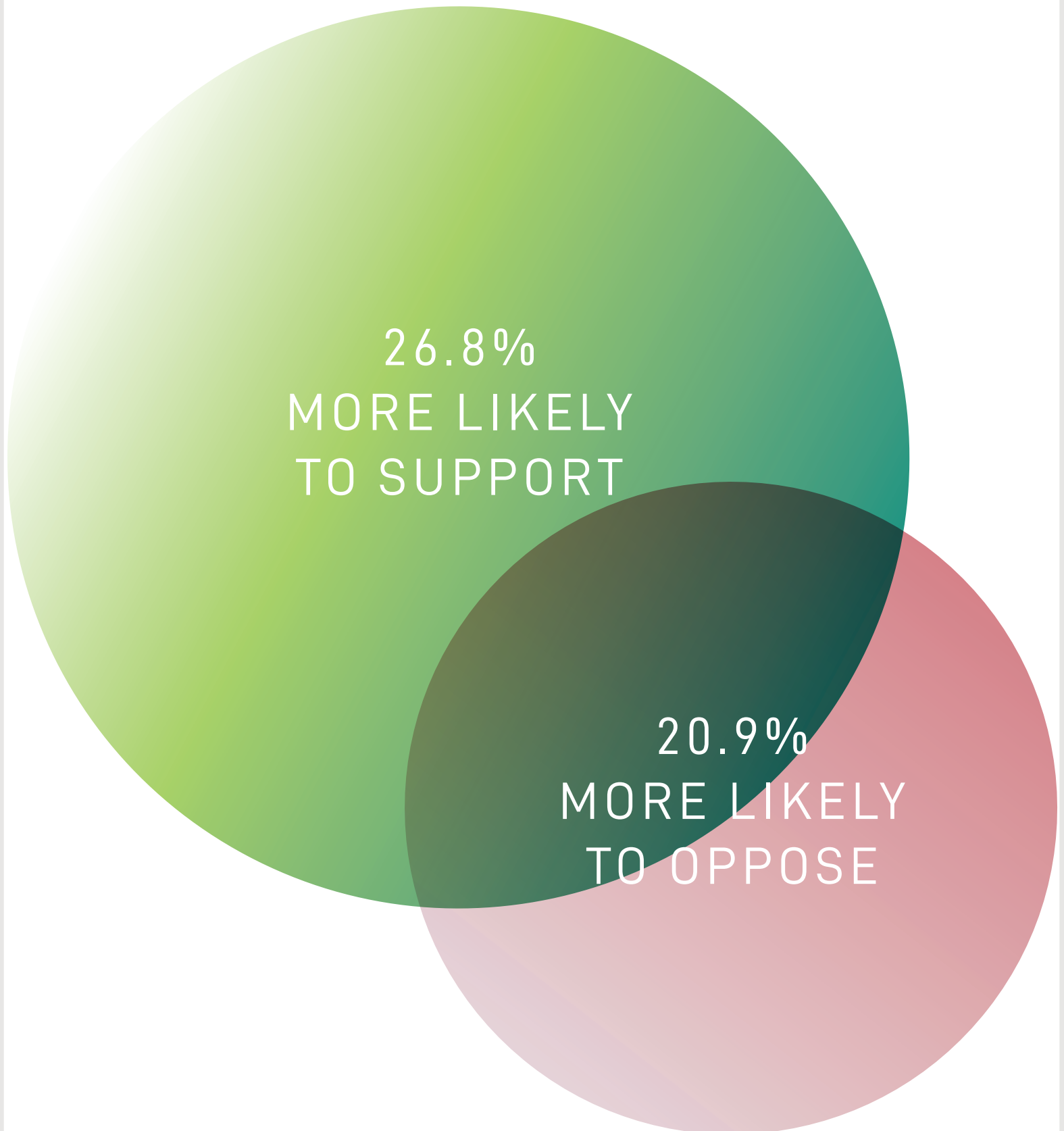
A photograph of three large, white, hyperboloid cooling towers of a nuclear power plant. The towers are set against a bright sky with scattered white clouds. The image is framed by a green border on the left and right sides, and a darker green border at the top and bottom. The text is overlaid on the central part of the image.

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

**JOHN DAVIES
CEO, DAVIES GROUP**

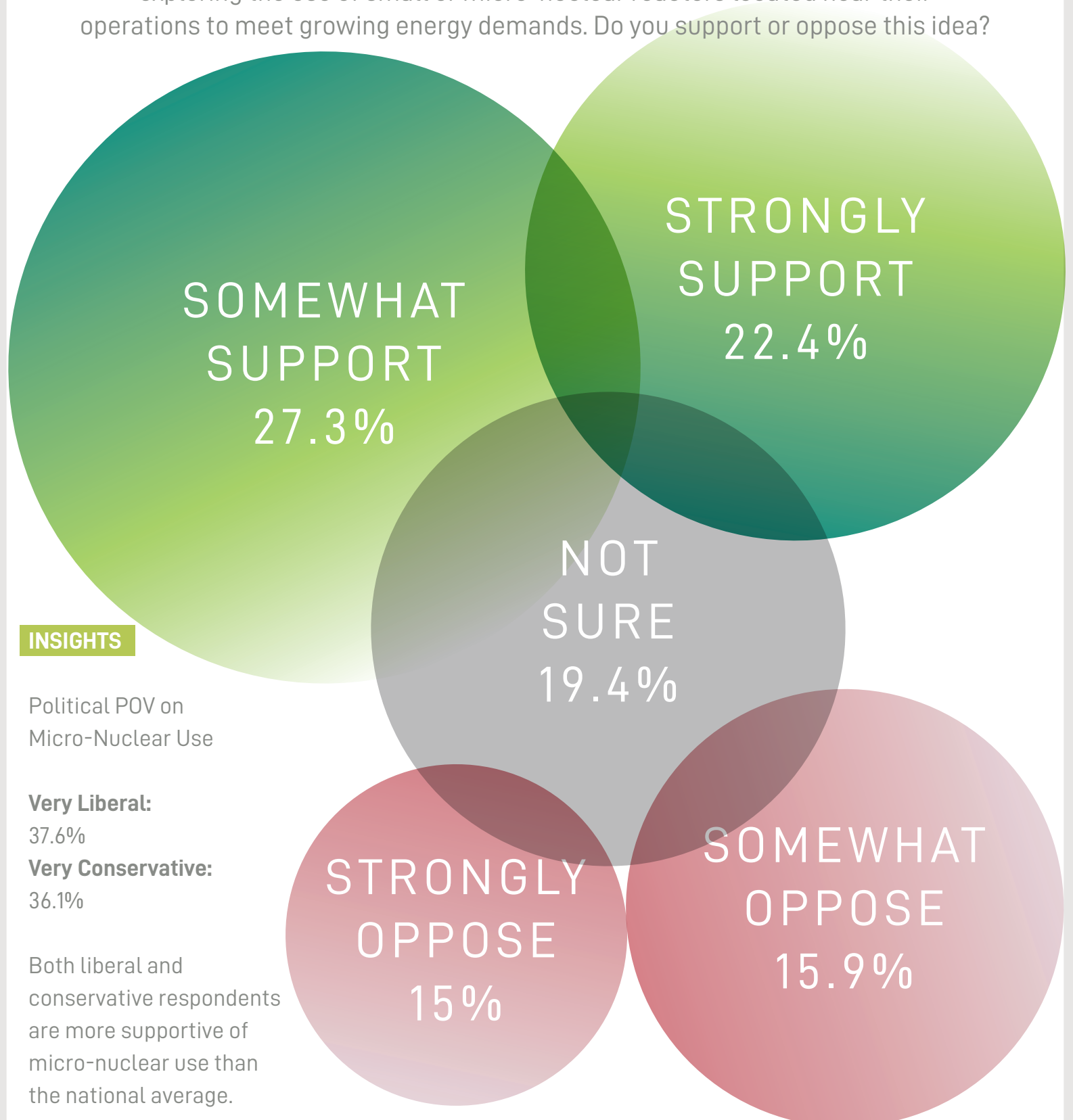
POST PERSUASION NUCLEAR

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



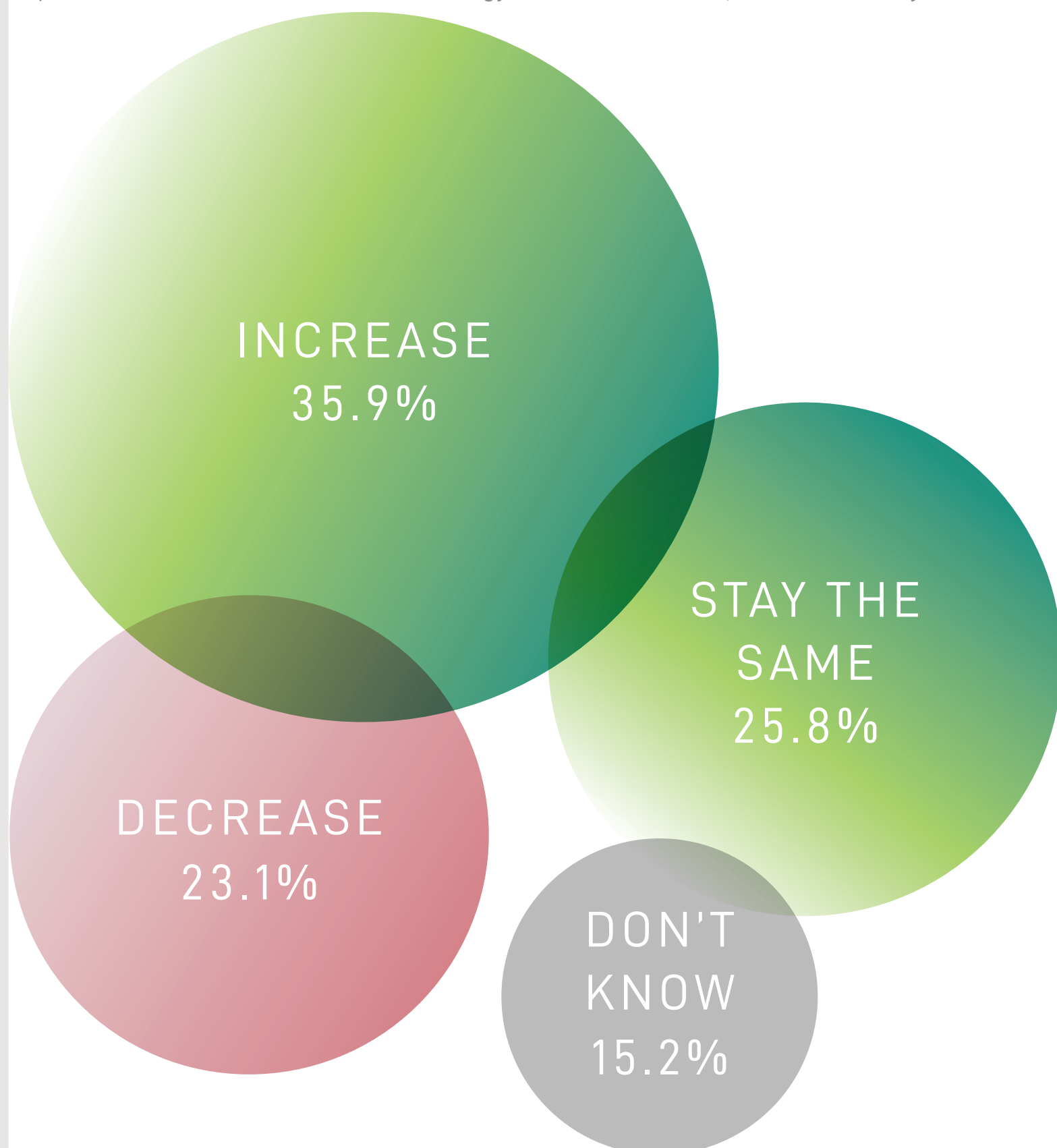
PUBLIC RECEPTIVENESS TO MICRO-NUCLEAR IS STRONG

Question: Some large power users – like data centers and manufacturing facilities – 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?



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.

77%

Support

Urban residents

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

68%

32%

MORE LIKELY TO SUPPORT

MORE LIKELY TO OPPOSE

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

59%

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

58%

Battery storage helps renewable energy efficiently power the grid.

58%

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

58%

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

55%

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


48%

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%

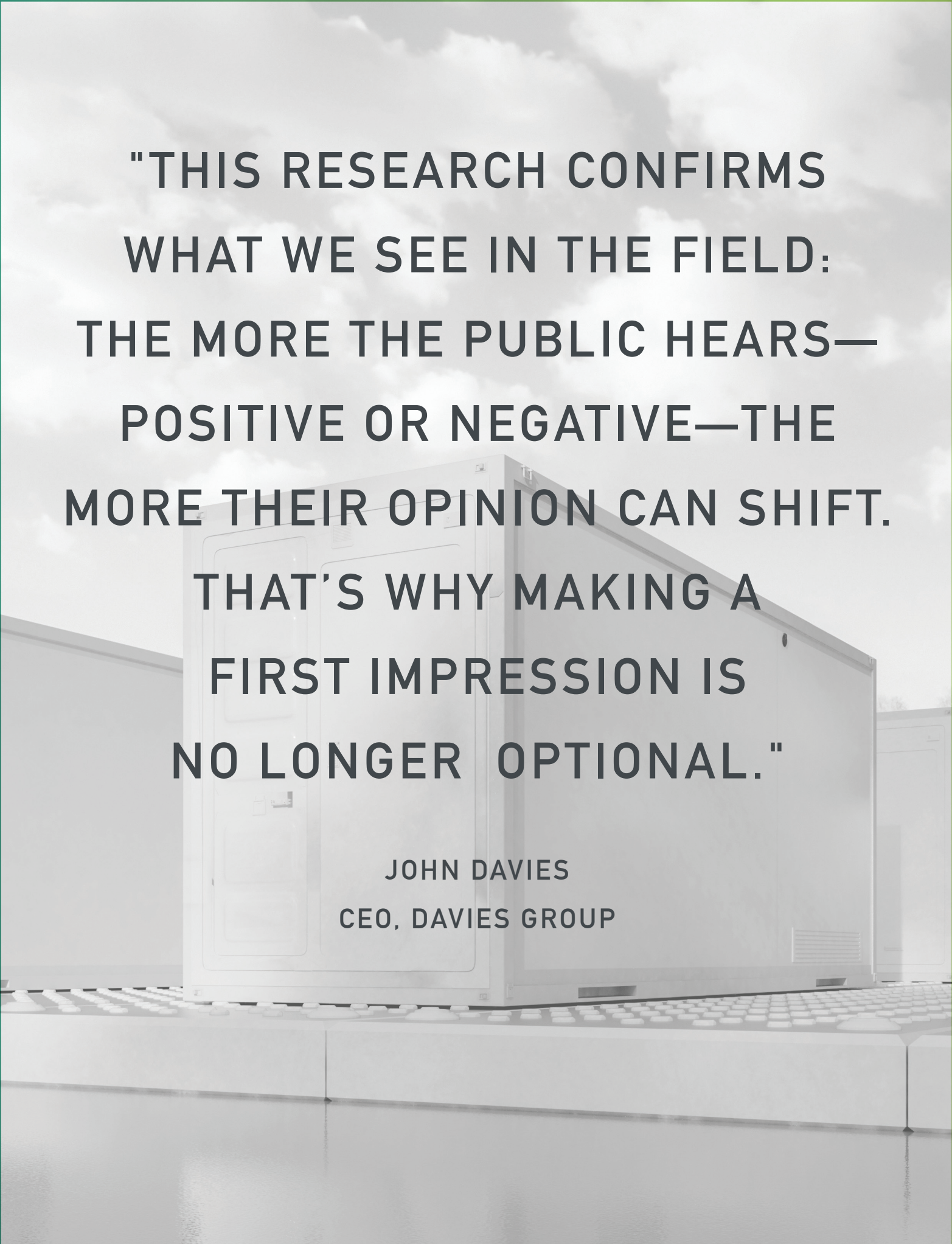


Battery storage buildings could be an eyesore in the community.

35%



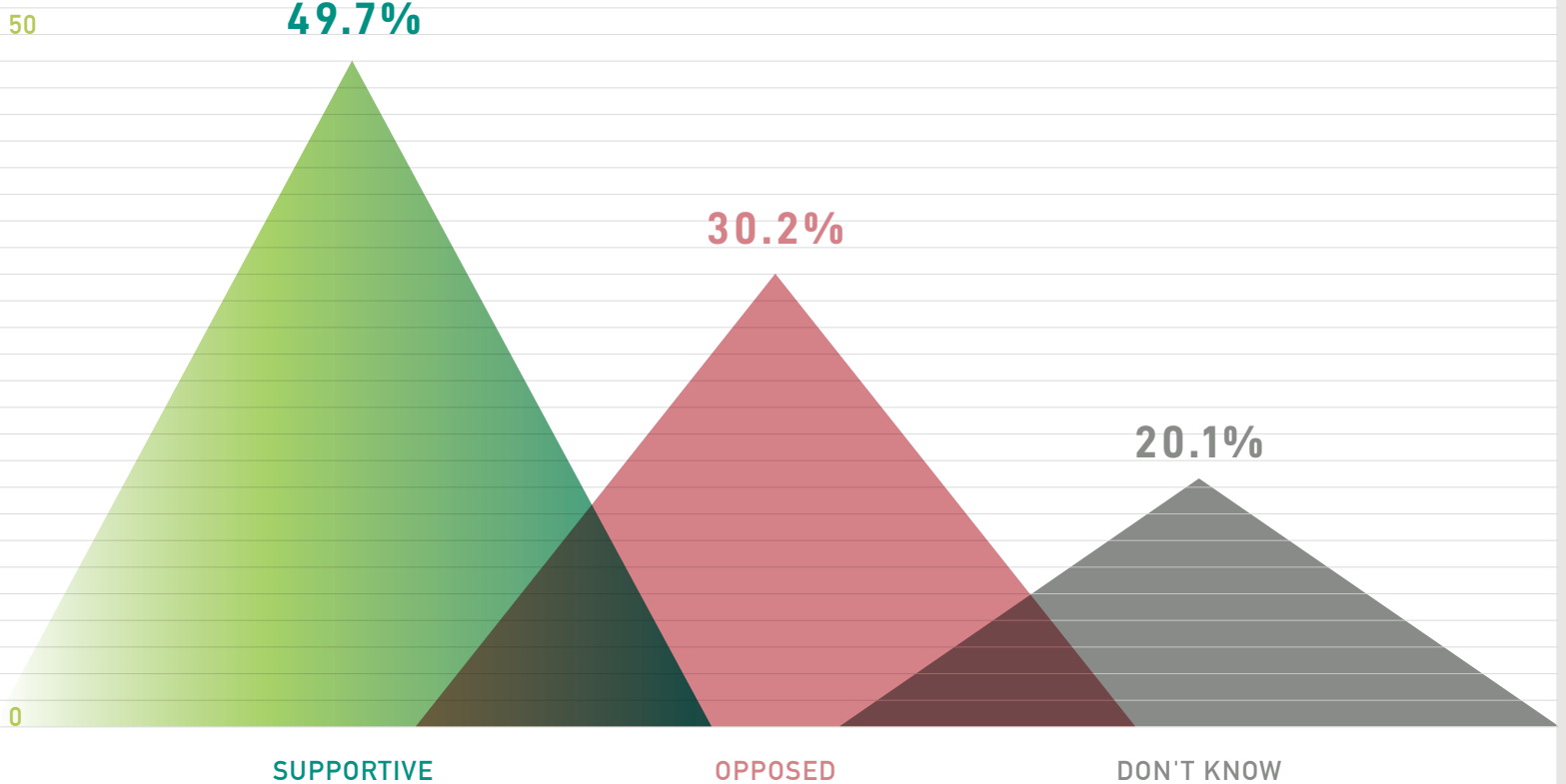
A battery facility could impact values of neighboring properties.

A white mobile office trailer is parked on a paved lot. The trailer has a large door on the side and a smaller door at the front. The background shows a cloudy sky. The entire image is framed by a green border on the left and right sides.

**"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**

100



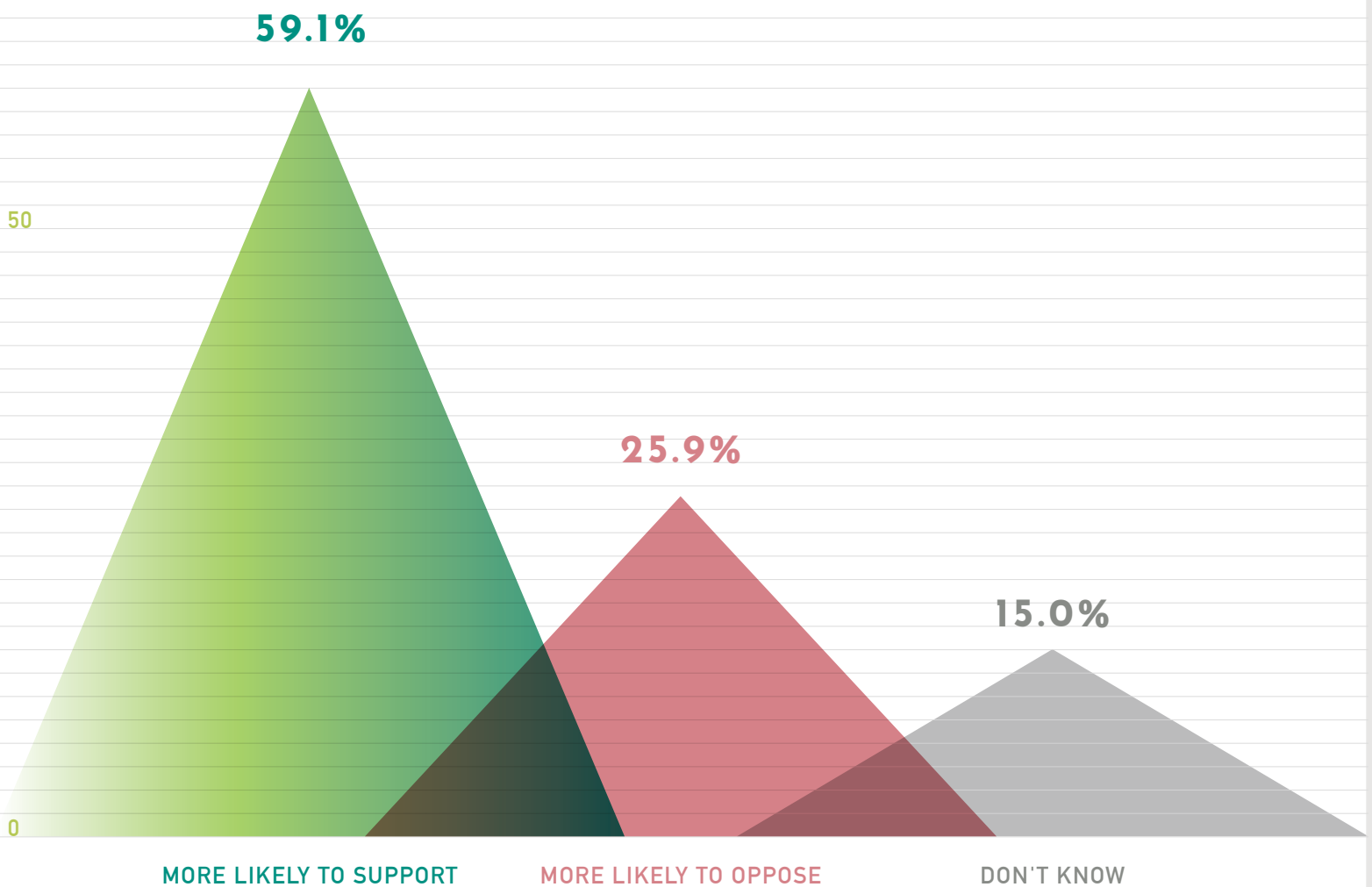
POST PERSUASION: BATTERY STORAGE PROJECT

Question: Now that you know more about battery storage, are you SUPPORTIVE or OPPOSED to utilizing 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.

100



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

65%

Wind farms can diversify and strengthen the energy grid.

65%

Wind farms now cost less than traditional energy sources.

63%

Wind farms operate without air or water pollution.

63%

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

63%

Wind energy is American made and independent.

62%

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



A horizontal bar chart with three bars of varying lengths, each representing a percentage. The bars are a dark red color. The first bar is the longest, followed by the second, and then the third. The percentages are displayed in white text on the left side of each bar.

Statement	Percentage
Wind farms can disrupt local wildlife and ecosystems.	44%
Wind farms can cause shadow flicker.	30%
Wind farms can impact scenic views and local tourism.	29%

44%

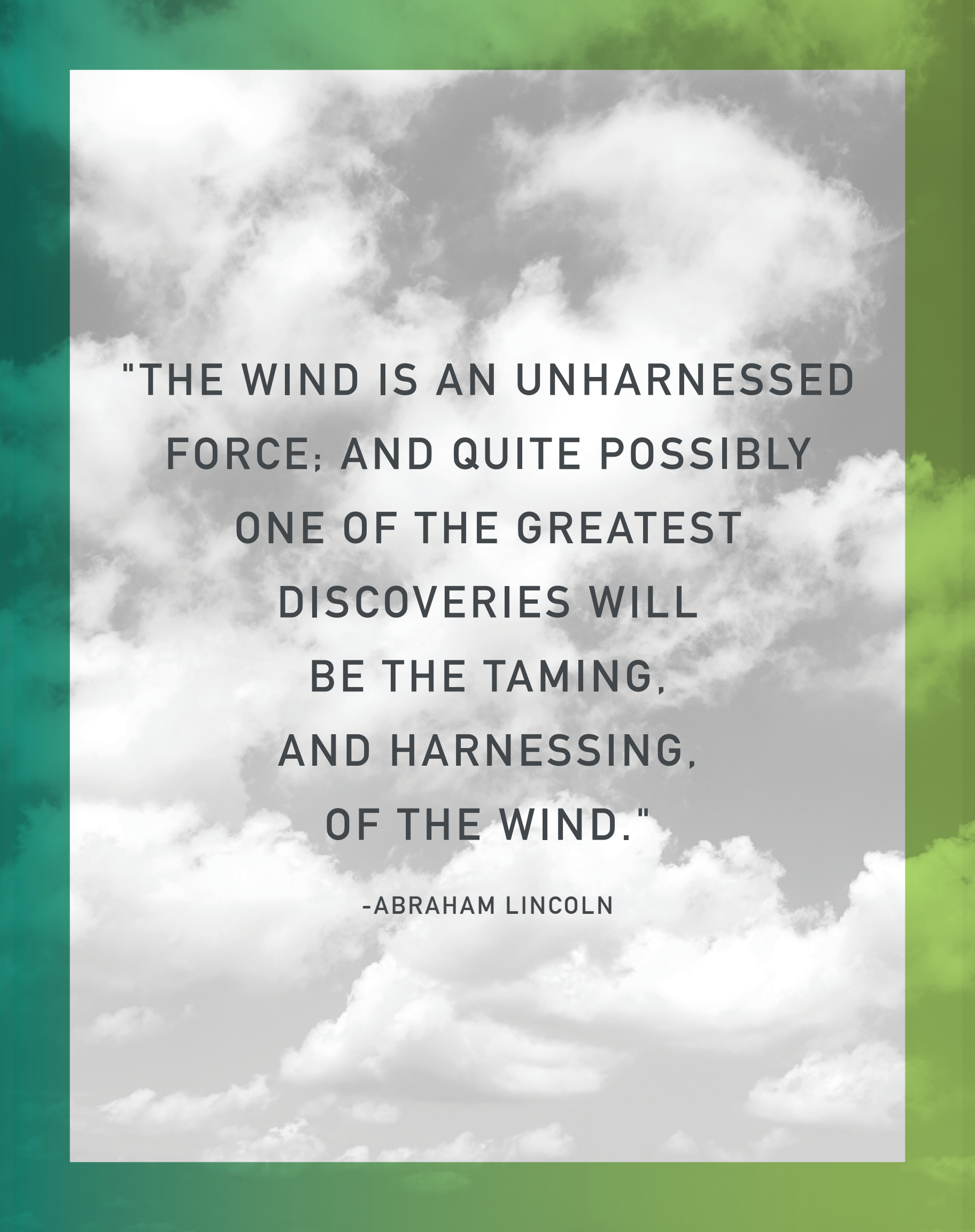
Wind farms can disrupt local wildlife and ecosystems.

30%

Wind farms can cause shadow flicker.

29%

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

100

50

0

74.6%

25.4%

MORE LIKELY TO SUPPORT

MORE LIKELY TO OPPOSE

POST PERSUASION: WIND FARM

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

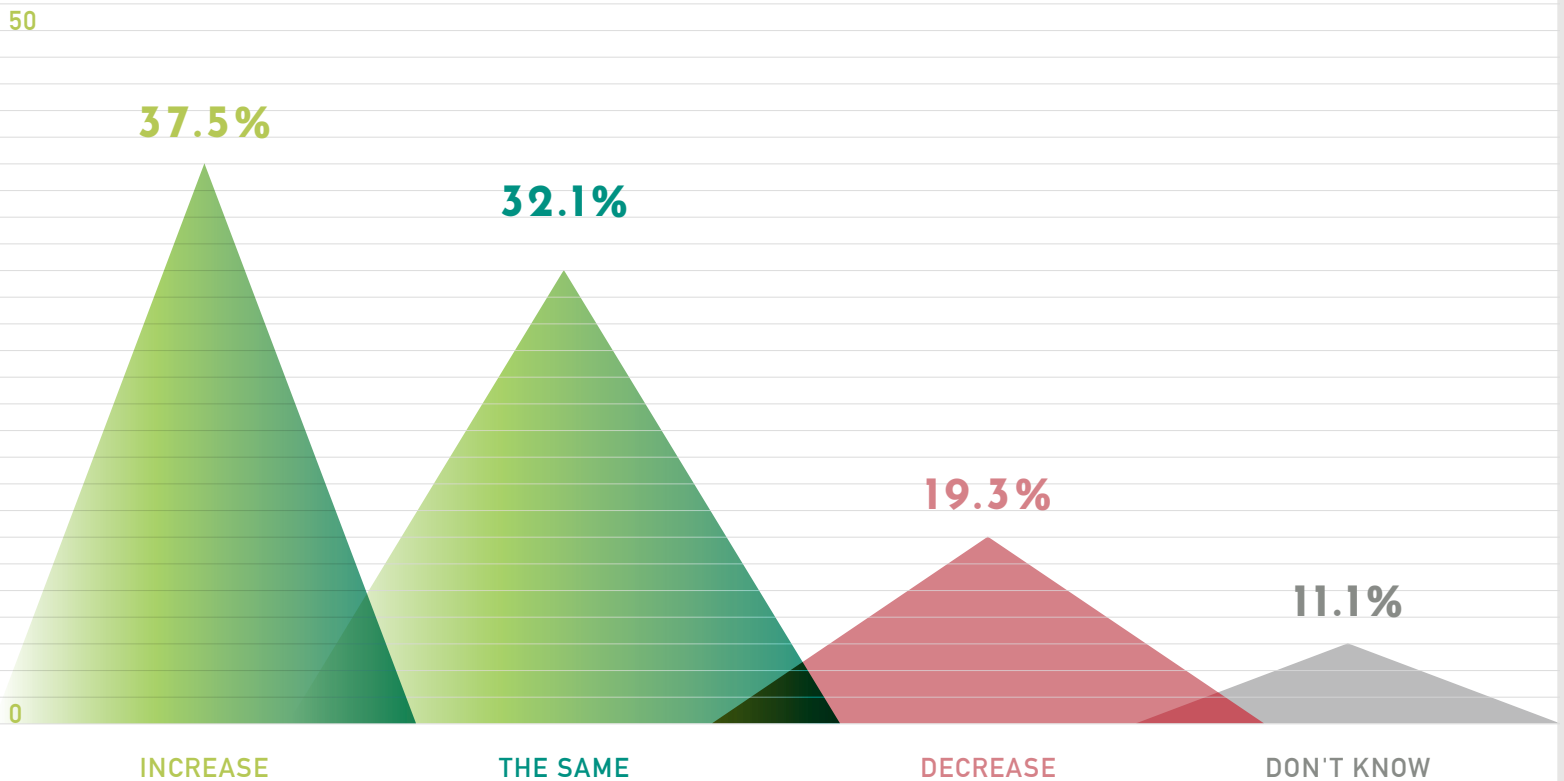


NATURAL GAS

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

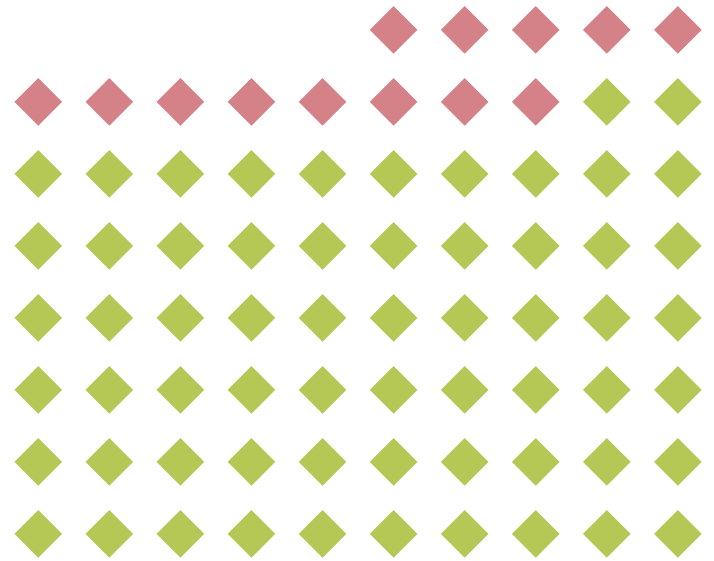


PRE PERSUASION: NATURAL GAS

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

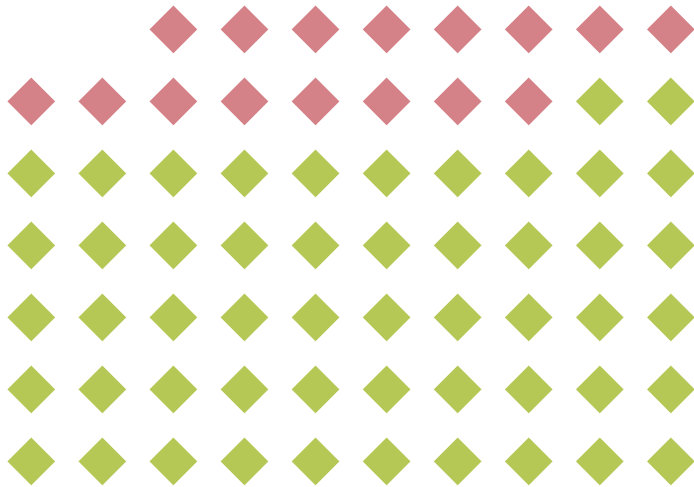
PERCEPTION: NATURAL GAS USAGE

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.



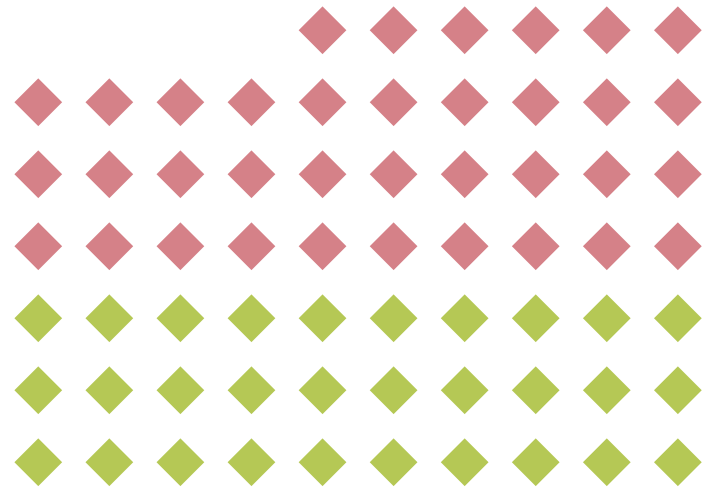
62% SUPPORT | **13% OPPOSE**

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.



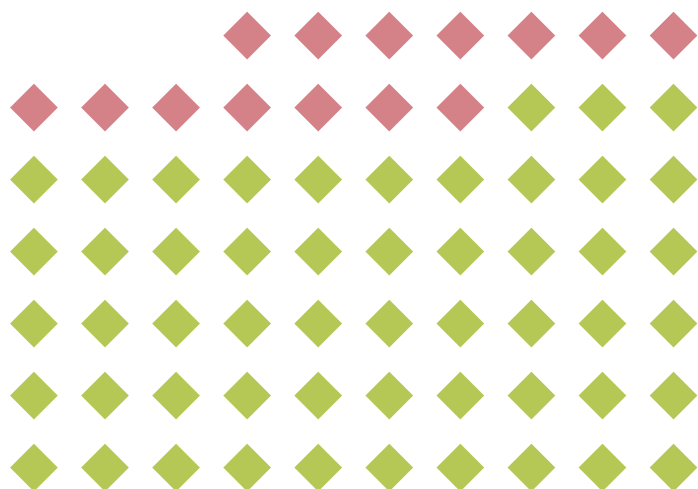
53% SUPPORT | **15% OPPOSE**

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.



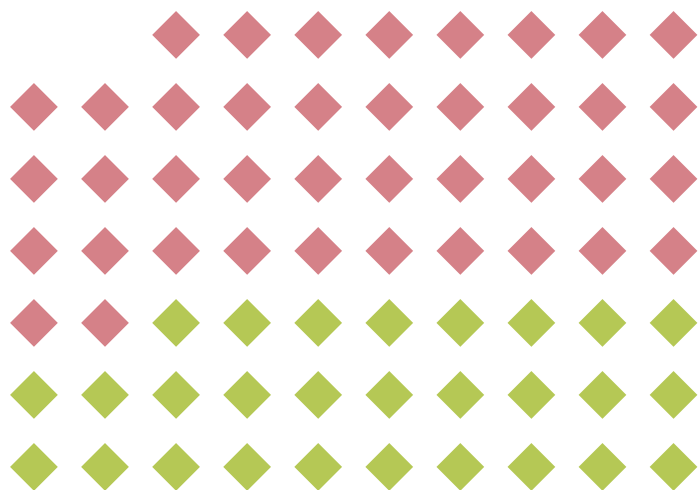
30% SUPPORT | **36% OPPOSE**

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 2007 and 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

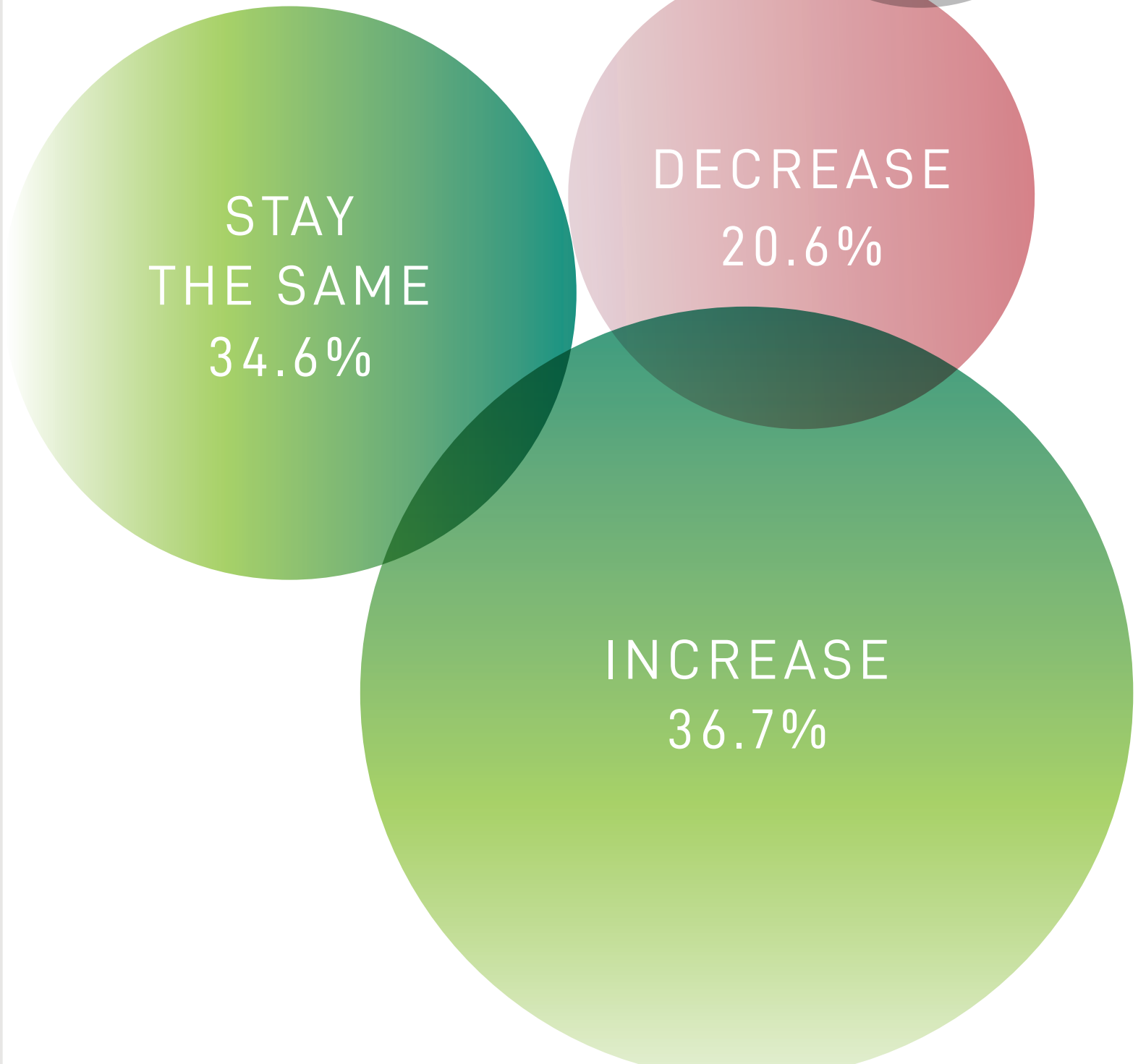
Question: Should the use of
natural gas as a fuel source INCREASE,
DECREASE or STAY THE SAME?

DON'T
KNOW
8.1%

DECREASE
20.6%

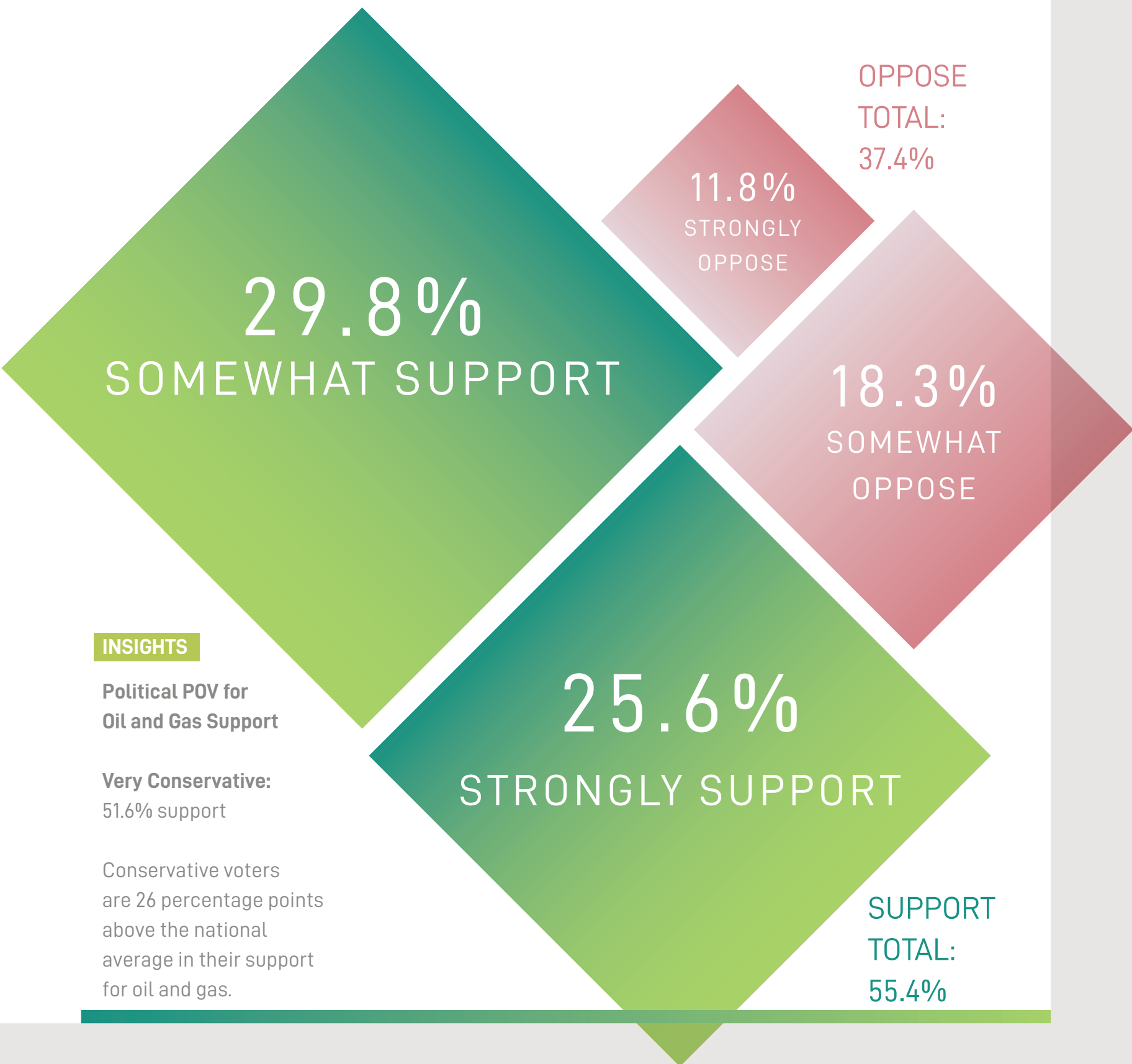
STAY
THE SAME
34.6%

INCREASE
36.7%



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

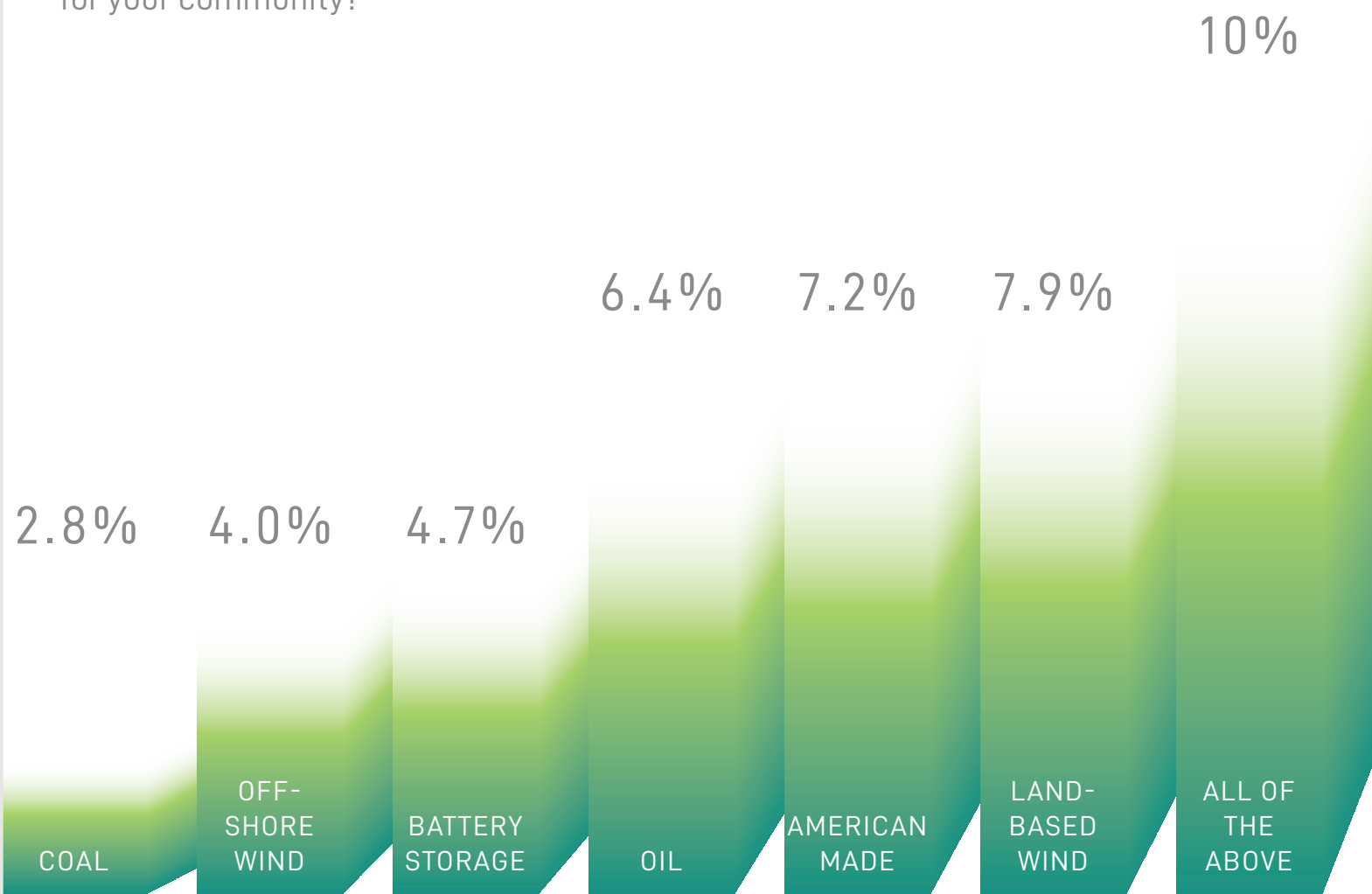
Conservative voters
are 26 percentage points
above the national
average in their support
for oil and gas.

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.



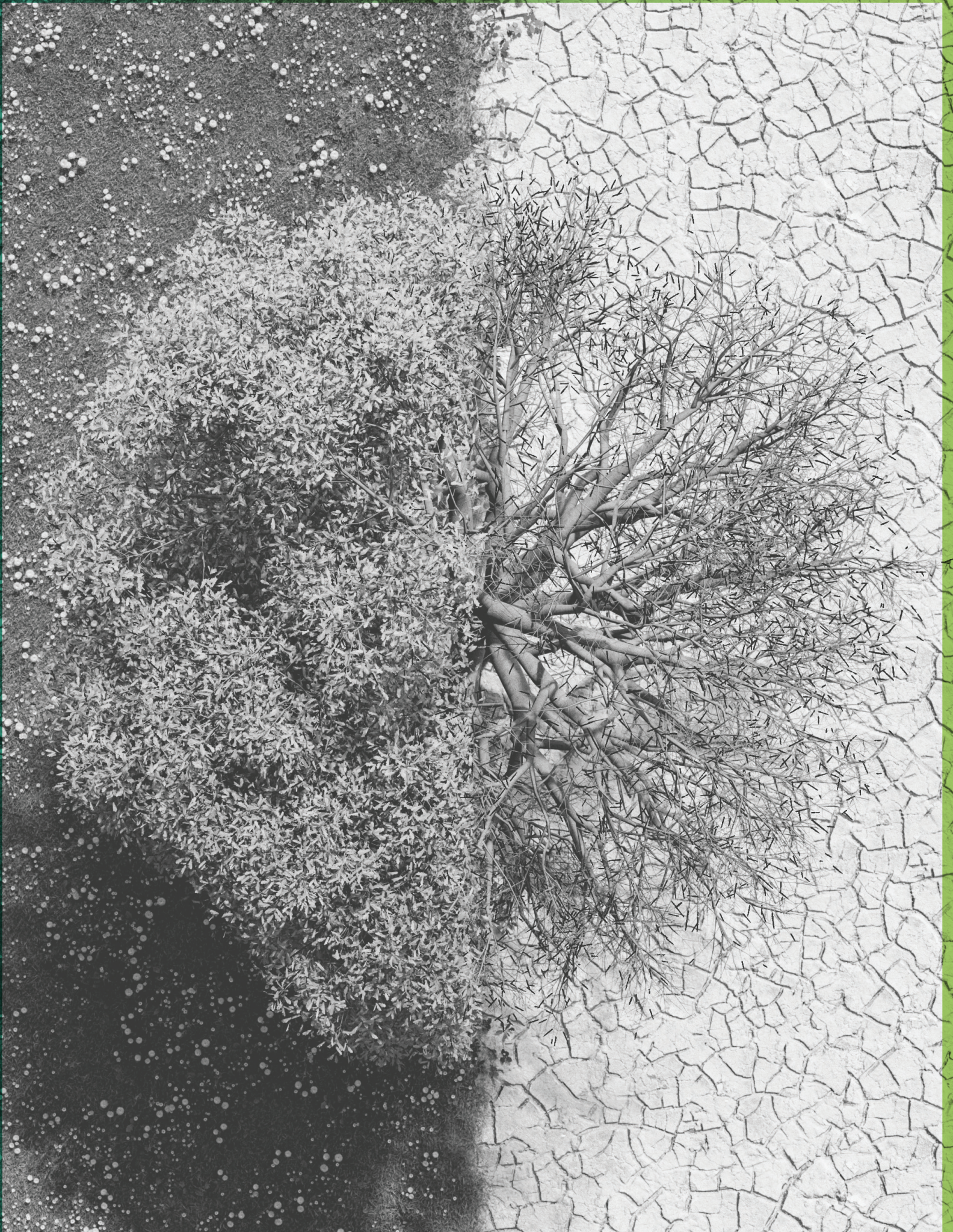


POST ENERGY PREPAREDNESS

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

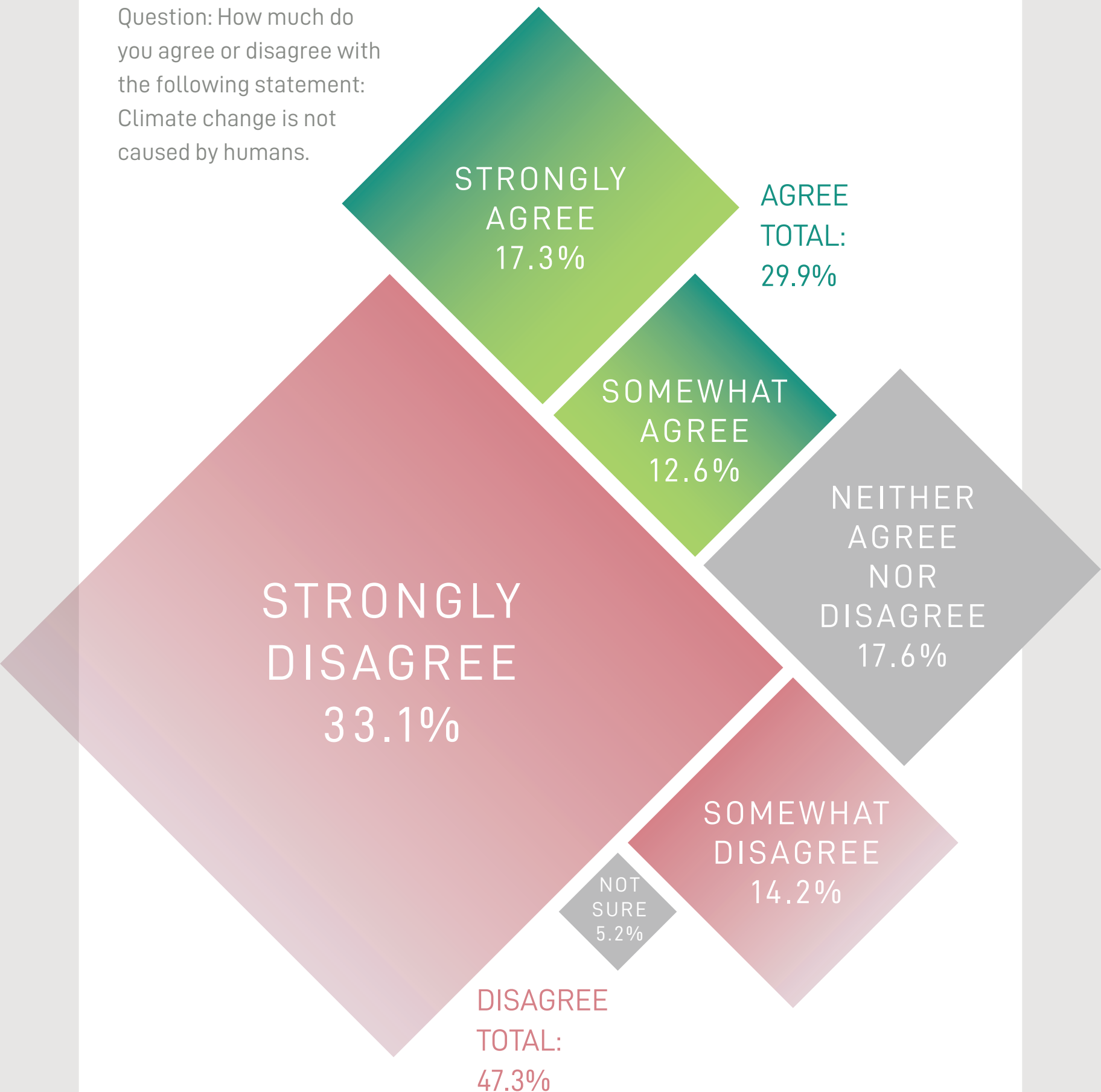
YES
41.7%

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.

23.1%

12.8%

●
Look for new,
emerging solutions
like green hydro-
gen or renewable
natural gas.

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



"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 understanding 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

 **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

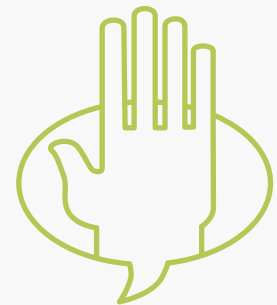
Stories connect
us emotionally, where
facts do not share your
best story.



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.



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