



NEWSLETTER Published September 5, 2025 • 6 minute read

On the Grid: Shelter from the Storm



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Hi Friend!

Welcome back to *On the Grid*, Third Way's bi-weekly newsletter, where we'll recap how we're working to deploy every clean energy technology as quickly and affordably as possible. We're excited to have you join us!



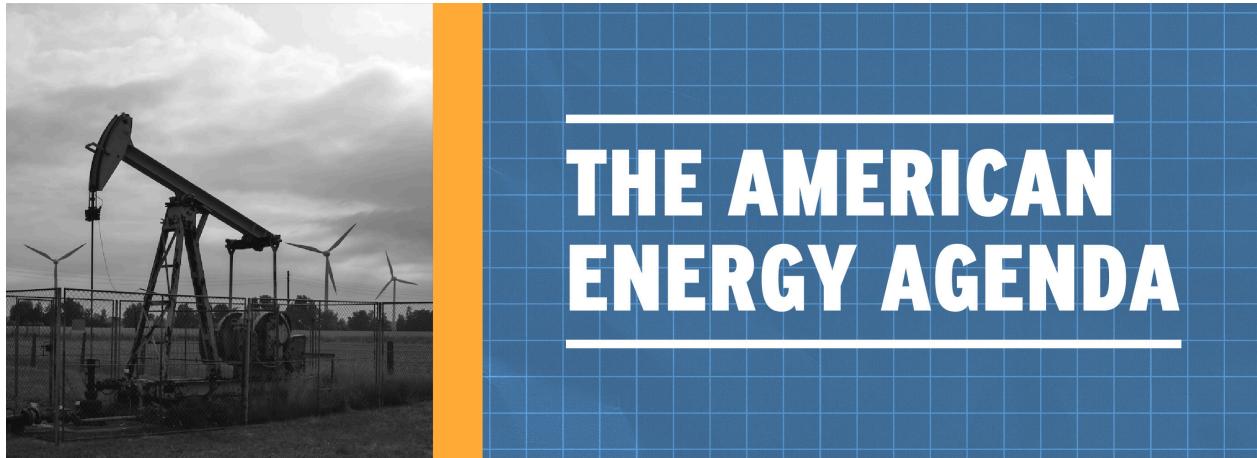
PUBLIC OPINION

Millions of Americans are now spending more than 30% of their income on housing costs—far more money than ever before. Yes, housing prices are climbing (our Econ Program has some excellent ideas to address that), but increasingly frequent extreme weather is contributing to the problem by driving up insurance costs. Homeowners are particularly impacted by climbing premiums: from 2021 to 2024, annual insurance premiums increased by an average of \$648, and are much higher in coastal states like Florida, where the average monthly insurance is \$789 per month.

As insurance rates jump, we conducted public opinion research to determine how aware Americans were about their increasing costs, and whether they connected the increases to climate change. The short answer: this is *not* an issue at the top of most Americans' concerns. Here are some details:

- 1. Americans Think Climate Change Is Real...But Not Pressing:** Just 3% of Americans say climate change is their top priority for elected officials today. That's not to say Americans don't think it's a problem—more than 50% of Americans say climate change is an urgent threat, and 80% think the US is increasingly impacted by serious natural disasters. But there's an important difference here between identifying climate change as a concern *and* viewing it as a top matter for our government to address.
- 2. Insurance Premiums Sting, But Grocery Bills Hit Harder:** Among respondents who have homeowners' insurance, 37% say it is a big expense. In the Southeast, that number is over 50%, 14 points higher than in the rest of the country. But all respondents were more likely to rank groceries as a bigger financial concern than insurance or other recurring costs like housing and health care.
- 3. High Insurance Costs Don't Increase Interest in Climate Mitigation:** Even though respondents worried about high costs and understand climate change is driving them higher, high insurance premiums haven't strengthened support for climate action. Respondents were more interested in more immediate action to lower the cost of living than longer-term efforts to stop climate change and, in so doing, lessen cost pressures from insurance prices.

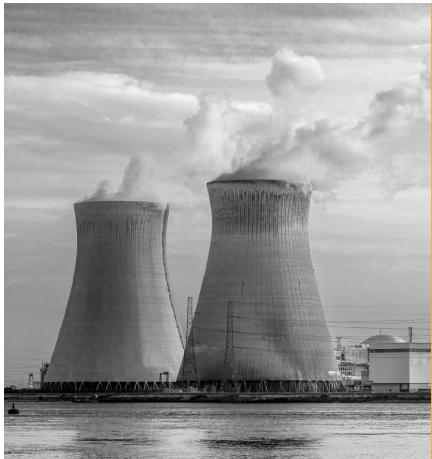
What We're Doing: Americans are incredibly angry that inflation has not been addressed, and prices keep rising in 2025. But all cost increases are not created equal. As our ongoing polling shows, Americans are most concerned about the high costs of everyday goods like groceries and necessities like electricity. We're sharing regular guidance for policymakers on how to talk about these issues in ways that meet the public where they are, and what to do about it. In this instance, trying to turn rising home insurance rates into a broad public concern and a case to justify immediate action on climate change isn't a winning approach.



The story of American energy right now is one of scarcity—how do we find enough power, fast enough, to meet the growing demand that AI, among other things, is fueling. The new wave of data centers now needs as much electricity as entire cities. But beneath the headlines and announcements of new hyperscalers is another troubling story taking shape—in Michigan, West Virginia, Pennsylvania, and Ohio, opposition is organizing to try and stop data centers.

Why We Should Care: Data centers are foundational to the modern economy and central to the race for global AI leadership. Policies like shadow bans on renewables, cancellation of new transmission lines, or tariffs that increase the price of critical energy infrastructure components create energy scarcity and increase costs. This is, understandably, fueling the public perception that adding new, energy-intensive activities to a local economy is a zero-sum game that will hurt existing ratepayers. At a time when the economy is slowing and costs are increasing, the last thing we need is to kill one of the few bright spots in the economy.

What We're Doing: We spend a lot of time understanding what it takes to get communities on board with technologies they may not know well—whether it's direct air capture or advanced nuclear—and how to help policymakers talk about it. We're also digging into the barriers that slow projects down, like permitting bottlenecks, and offering ways to overcome them. But the most important thing that needs to happen is that policymakers and companies need to authentically engage communities and community leaders, understand their concerns, and work together to address them. Right now, that starts with energy costs.

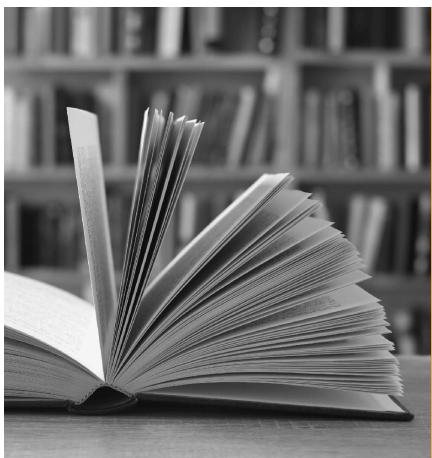


NUCLEAR

The Trump Administration has set an ambitious target of building to 400 GW of nuclear energy by 2050. As longtime readers will know, we support this goal in principle. If the US is going to stay economically competitive, then we need as much clean firm power as we can get. But as we've noted before, ambition alone is not enough. The Administration's Foreign Entity of Concern restrictions, broad tariffs, and sweeping agency disruptions are already creating obstacles that will slow down nuclear projects. One of the most fundamental challenges, however, is the workforce.

Where We Need to Focus: Building to 400 GW of nuclear capacity will require a workforce far larger and more specialized than what exists today. That means creating pathways *now*, through education and apprenticeships, to bring a new generation of Americans into the field. That includes welders, electricians, and pipefitters, as well as engineers, operators, and regulators who understand advanced design and keep projects on schedule.

What We're Doing: We're serious about meeting this moment. Our newest memo lays out concrete steps for expanding federal training programs, like the Nuclear Safety Training and Workforce Development Program, and offers clear recommendations on programs that Congress can and should authorize, appropriate, and expand to meet the demand ahead.



WHAT WE ARE READING & LISTENING TO

- Martha Muir and Alexandra White, in the *Financial Times*, spotlight a steel mill in Middletown, Ohio, that abandoned plans to convert its coal-fired furnace to run on hydrogen—an upgrade that would have been the first of its kind and created 1,200 construction and 170 permanent jobs—after the Trump Administration cut clean energy incentives. The town, long battered by industrial decline, is now left without the economic lifeline it was banking on.
- Max Bearak and Mira Rojanasakul, in the *New York Times*, illustrate how China transitioned away from copying clean technologies to becoming a global innovator, now filing more than twice as many high-quality clean energy patents as the US.
- Debbie Cox Bultan, on the NewDeal's *Honorable Profession* podcast, sits down with Kristina Costa, former Deputy Assistant to the President and Director of the Office of Clean Energy, Innovation, and Implementation in the Biden Administration, to discuss the clean energy progress we've made so far and the path forward through permitting reform, innovative financing, and strategic partnerships.