


**2026**

UTILITY & ENERGY TRENDS GUIDE FOR MARKETERS

Energy Demand Surging:
An Era of Exponential Load Growth

**BORSHOFF**



WHAT'S RESHAPING POWER, WATER AND ENERGY, FROM THE EXECUTIVES LEADING THE CHARGE.

Borshoff interviewed several energy leaders across the country, and attended speaking events featuring energy sector influencers, to gather the insights shaping the future of energy.

We collected, analyzed and summarized what we heard, including many of the key factors shaping the energy landscape in 2026 and beyond.

In the following pages, energy leaders in marketing, communications and PR will find perspectives and opinions from your peers to help guide your planning and strategies.



DEMAND EXPLOSION

Energy demand is at historic levels.

Every sector is surging, from residential to commercial to industrial. The industry describes this moment as unprecedented.

So what's driving the spike?

- AI + hyperscale data centers (“AI needs a lot of juice to run”) alone are rewriting demand curves
- Manufacturing and chip plants
- Logistics and shipping
- Electrification of buildings and vehicles
- Extreme weather (hotter summers and colder winters)

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We haven't seen this kind of demand since World War II.

INDUSTRY PANEL MEMBER, IBJ MEDIA'S FUTURE OF ENERGY SUMMIT 2025

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“We're seeing inquiries that would double the size of our entire system. These numbers are staggering. Completely unprecedented.”

- **Communications Leader, Generation and Transmission Co-op**

Utilities must figure out how to add massive new loads without burdening residential customers.



RESOURCE SUPPLY + GENERATION

“All of the above” is the only realistic path for the next decade.

Utilities are charged with keeping megawatts on the grid, relying on all of the above: solar, wind, natural gas and nuclear. Industry leaders are mostly aligned that they need all if it to serve their customers.

“Entire states want to electrify and it’s currently unrealistic to make the transition without natural gas. Literacy around this is low and it’s a very complex issue that customers need to know the full picture. Everyone wants cleaner energy, but not with all the costs.”

- Marketing and Communications Leader, Gas and Electric

Some believe that coal was retired too early in certain areas, while the emergence of natural gas, being designated as “clean energy,” is vital. Nuclear is resurging via Small Modular Reactors and recommissioned plants, as renewables alone cannot meet today’s exponential load growth.

Data centers require firm, 24/7 power, not intermittent output.

“The way to lower electricity costs is to increase supply and baseload generation.”

- Industry Panel Member, IBJ Media’s Future of Energy Summit 2025

Utilities can’t pull baseload off the grid then backfill with intermittent resources. The grid must be additive, not substitutive.

“The cross-industry sectors and the energy transition continue to evolve. We can only expect this demand to continue to grow as economic development is also continuing to create demand.”

- Utility CEO

GRID + TRANSMISSION MODERNIZATION

The grid is straining under new loads.

The combination of aging assets (some 50-100+ years old), new industrial loads, transmission constraints, EV charging growth and data center clusters means utilities must rebuild infrastructure while staying affordable.

“When the power is out, we can’t charge our phones or watch football. Reliability is really high on the list of customers’ needs.”

- Marketing and Communications Leader, Gas and Electric

The industry is facing a significant challenge in that electricity is not a normal market. You can’t have scarcity. Customers’ power must always be available, every second of every day, people’s lives and businesses depend on it.

“Certain manufacturing runs 24/7 and energy can be their biggest line item. Reliability and managing rising costs are important and they look to and consult with their providers as trusted energy advisors.”

- Marketing and Communications Leader, Gas and Electric



POLICY, REGULATION & RATE PRESSURE

Policy shifts are a pressure multiplier.

Executives emphasized a dangerous cycle when policy pushes rapid transitions and utilities are pushed to comply. Administrations have reversed and changed previous policy, translating into millions of dollars invested in projects that become stranded.

Utilities want to protect ratepayers from any fallout and are direct in their evaluations.

“Policy has added to the burden of ratepayers.” “Risk is shifting from shareholders to customers.”
- Industry Panel Members, IJB Media’s Future of Energy Summit 2025

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I firmly believe that utility companies have a responsibility to find ways to maximize our resources and provide our needed services at the lowest possible cost.

- UTILITY CEO

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It is believed that regulators must balance the interests of the ratepayer, examining how utilities lead the way navigating:

- Affordability
- Sustainability
- Reliability
- Rapid change

And need to do it while customers grow increasingly frustrated with rising bills.



AFFORDABILITY & RATE CASES

Ratepayers are reaching their limit.

Public frustration is climbing. Everything in their life costs more, energy included. Utility leadership urges the sector to be transparent and respect the ratepayer.

“Customers across the board want to know how they can lower their bills. Our campaigns throughout various media channels are communicating and educating customers about exactly how to do that.”

- **Utility CEO**

To be a helpful customer-first energy provider, utilities should avoid unnecessary burdens on households and add transparency and education around bills, proactive communications (especially around outages) and resources to save on costs.

“Show customers more real-time data so they can make decisions around how they use their energy. Share the discounts for usage times, especially for environmentally conscious customers.”

- **Marketing and Communications Leader, Gas and Electric**

More communication is needed from both utilities and data center developers about how data centers can be good community partners and even help contribute to lowering residential bills.

“Residents shouldn’t pay for a data center’s energy needs. Billion-dollar tech companies should.”

- **Industry Panel Member, IJB Media’s Future of Energy Summit 2025**

Some states are now requiring large-load customers to pay up front, and utilities are creating new commercial-only utility brands in an effort to structure rates so industrial growth benefits residential bills.

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Customers across the board want to know they can lower their bills.

- **UTILITY CEO**

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ENERGY MIX + FUTURE PLANNING

The return of gas and nuclear.

Coal conversions to natural gas are accelerating while nuclear is now more openly embraced on both sides of the aisle. Many states are offering nuclear incentives and the emergence of SMRs (small modular reactors) are viewed as:

- Safe
- Scalable
- Dispatchable
- Critical to sustainability goals

There is a greater industry consensus that if the sector is serious about carbon goals, there must be a shift to nuclear.

“If we want to get to carbon free, nuclear is going to have to play a big role because while many people want to add in solar and wind, we need the capacity to keep up with projected needs.”

- **Communications Leader, Generation and Transmission Co-op**



WATER: A NEW LIMITING FACTOR

The water supply can make or break economic development.

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The most effective way for us to assist utility providers is to be part of the economic development conversation from the very beginning.

- UTILITY CEO

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Mega industries now ask for a guaranteed water supply before they will build in specific areas. Water utilities are now seeing a more strained supply coming from heavy industrial requirements, increased wastewater impact and rising infrastructure costs. And unlike electricity, water is finite, and economic development will fail if water cannot be guaranteed.



DATA CENTERS: FRIEND OR FOE?

Data centers are becoming a driver of tension.

Data centers demand enormous power, use large volumes of water and consume significant land. Developers face fierce “Not In My Backyard” opposition that could potentially slow down growth and any economic development benefits.

IBJ Media’s Future of Energy Summit 2025 industry panelists emphasized:

- “Data centers help affordability because they carry a big portion of fixed costs.”
- “They must communicate earlier and more often.”

While residents worry:

- “Will this raise my bill?”
- “Why are you building next to homes?”
- “Why are tech companies taking all the power?”

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The number of data centers is going to increase as AI continues to grow in popularity.

- UTILITY CEO

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“There is backlash over these data centers. Rural communities don’t want massive data centers in their backyards, are already frustrated that bills are going up, and they don’t understand the mechanics of the numbers.”

- **Communications Leader, Generation and Transmission Co-op**

Utilities and data centers must tell a clear story, communicating the benefits of jobs and economic uplift during construction booms, and long-term talent attraction and community investment.

CUSTOMER EXPERIENCE & EXPECTATIONS

The customer of 2030 is not the customer of 2010.

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All the way through the 2010s this was a very static industry: Make sure the coal and natural gas plants are running and everything is operational. Marketing and communications were less important in this set-it-and-forget-it era.

- COMMUNICATIONS LEADER, GENERATION AND TRANSMISSION CO-OP

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Tomorrow's customers want:

- Easy-to-understand bills
- Personalized usage insights
- Multilingual communication
- Faster digital tools
- Clear sustainability explanations
- More transparency around increased cost drivers

“Customers don't just compare us to other utilities; they measure us against other retailers and healthcare providers when it comes to customer experience. They want more from us.”

- **Utility CEO**

To meet expectations, utilities must modernize and personalize:

- Customer portals and apps
- Customer experience journeys across digital and traditional touch points
- Proactive, accurate and real-time outage communication
- Energy tools and resources that make it simple to save on costs

“We need to engage folks where they are and meet their unique needs by staying connected and listening. Customer meetings and in-person events help us educate and collect feedback. We need to embrace the concept of energy literacy to help people understand and have context for things like why rate cases happen. We communicate proactively, even when it's bad news.”

Marketing and Communications Leader, Gas and Electric

CYBERSECURITY & RESILIENCE

Cyberthreats are now constant, sophisticated and global.

There are many rogue actors from countries across the globe, and utilities are under nonstop digital attack, now more than ever.

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Cybersecurity challenges increase as everything becomes digitized. There are lots of bad actors trying to hack the system nonstop, and industries including banks can't operate without electricity.

- MARKETING AND COMMUNICATIONS LEADER, GAS AND ELECTRIC

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Executives and communications leaders warn that utility substations are high-value targets, and attackers are sophisticated enough to understand that the significant downtime could cripple economies. Rebuilding major equipment can take months, and in addition to time, utilities are faced with rising capital costs due to cyber risk.

While the world moves toward digitization and consumers demand digital communications and experiences, full digitization unfortunately means more attack surfaces and vulnerabilities for utilities. Cybersecurity is now mission-critical infrastructure to keep their customers up and running.

POLITICS & RATEPAYER REALITY

The politics of power: Addressing the tension and public frustration.

Executives and policymakers agree, energy has become a political flashpoint. Many new questions continue to surface for utility leaders, marketers and communicators to answer:

- Who pays for new load?
- Should tech giants subsidize residents?
- How fast should coal retire?
- Should natural gas be treated as clean?
- Should nuclear be incentivized?
- How much should policy drive affordability?

A state government leader suggests: “We need many sources to meet demand, but we can’t punish ratepayers.”

Utilities must navigate new questions and provide transparent answers around:

- Voter frustration
- Policy volatility
- Local opposition
- Regulatory scrutiny
- Pressure from both environmental and industrial groups

“Look at our website and annual report, where it talks about carbon emissions, social impact, governance and community service. When the political environment changed, environmental sustainability content got peeled way back.”

- **Communications Leader, Generation and Transmission Co-op**



MARKETING & BRAND IMPLICATIONS

The brand battleground calls for trust, literacy and transparency.

“Utilities do a great job for customers when they are out of sight and out of mind. This is a bit of a thankless business. We don’t get too many calls saying, ‘Hey thank you very much.’”

- Utility CEO

With rising bills and tension, marketing and branding come with critical imperatives. Utilities need to prioritize educating customers with transparency and confidence. It’s not an easy subject to own, but it’s a reality, and most residents want to know the “why.”

- Communicating the complexity of resource decisions and how they are critical to long-term affordability and reliability.
- Improving energy literacy in a way that makes sense to customers.
- Avoiding industry terminology that only makes sense to the sector, and breaking down complex ideas in meaningful language that relates to everyday and practical understanding.

“In the past we looked at customers in segments including residential, commercial and industrial. Today these segments require more 1:1 communication versus broad segmentation. We need to meet the needs of individual businesses and homes, for their specific needs.”

- Marketing and Communications Leader, Gas and Electric

It’s smart to explain the impacts of data centers, addressing the tensions with the positive benefits in an authentic way. This topic is likely the most critical to share real data and proof to ensure customers aren’t hearing spin, but actual fact-based and helpful information.

Utilities’ communications need to demonstrate community investment, to be proud of the work they do to grow the community and the people living in the areas they serve.

Invest in and communicate the efforts to modernize the digital experience, and how this helps customers manage their lives in meaningful ways. Build a brand on how it will add convenience to customers, specifically addressing the negative tensions that exist between them and the utility. Be honest about these and communicate how the utility is addressing each tension through investment and resources centered on their needs.

“It’s an emotional landscape on a spectrum from contempt to love, and we need to help customers find and appreciate the middle ground.”

- Marketing and Communications Leader, Gas and Electric

Tell your story of reliability, affordability and sustainability as a north star for the brand. Nuclear and natural gas require clear narrative framing so that misinformation doesn't fill the knowledge gap.

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Customer affordability is always top of mind as costs continue to rise for everyone, and we're tasked with continuing to provide safe and reliable services.

- UTILITY CEO

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Review and audit your brand story across channels. Check it for:

- Trust
- Education
- Transparency
- Reliability
- Empathy

And maybe most importantly,

ARE YOU REAL? OR ARE YOU SPINNING?



**THE LEADERS
WE HEARD FROM
WERE CLEAR:**

The challenge is massive,
but so is the opportunity!

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