Statewide Perceptions of the New York State All-Electric Building Act

Summer 2025 (DRAFT)

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ABOUT RESEARCH & MARKETING STRATEGIES, INC.

Research & Marketing Strategies, Inc. (RMS) is a full-service market research firm located in Central New York. Formed in 2002, RMS helps organizations that are looking to know more about their customers and/or potential customers. We conduct surveys, focus groups, mystery shopping, competitive studies, and in-depth analyses. Each project is customized and gets personal attention by the best in the business. We have a reputation for getting results and offers an independent means to conduct telephone, on-line, and mail surveying, in-depth interviews, intercept interviews, and participant recruitment as well as focus group hosting through QualiSIGHT – our onsite call center and focus group facility. Taking advantage of the region's reputation for being a great market study barometer, we also recruit and moderate for focus groups, community forums, and town meetings. Learn more by visiting our website: rmsresults.com.

EXECUTIVE SUMMARY

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RMS is pleased to present the findings from the 2025 New York State All-Electric Buildings Act Perceptions and Awareness Study conducted via an online survey. RMS does not take a position for or against the All-Electric Buildings Act. Our role in this study was to analyze the data objectively and present the findings with accuracy and integrity. The insights outlined in this report reflect the perspectives and experiences of respondents and are intended to inform ongoing dialogue and policy discussions. Based on the data, the following themes emerged:

- Support for the all-electric legislation remains low across New York State. Public awareness is limited while both awareness and attitudes vary significantly by region. Urban residents, particularly renters and those in multifamily dwellings, often express indifference toward the policy citing limited control over appliances and housing systems.
- Across all regions, residents voiced strong concerns about implementation – especially regarding winter reliability and the need for backup heating systems. Many view electric heat pumps as insufficient for cold climates and stress the continued need for fossil fuel alternatives during extreme weather conditions.
- Cost remains a prominent barrier. Respondents frequently expressed apprehension about affording appliance upgrades, particularly if restrictions extend beyond new construction to existing homes. For many, these concerns raise fears of financial strain or forced changes without adequate support.
- While some participants supported the legislation, citing environmental protection and the urgency of addressing climate change, many others took a more nuanced stance. These individuals generally supported climate action but viewed the current policy as ineffective, overly rigid, or symbolic rather than impactful. Several emphasized that without broader systemic change, the law's overall effect on emissions would be limited.
- Additionally, the potential for increased home construction costs surfaced repeatedly with some respondents indicating the law would influence their willingness to build or buy a new home. Open-ended responses suggest hesitancy toward future residential development under these conditions.

While many New Yorkers share a desire to address climate change, there is evident need for greater public engagement, infrastructure readiness, and economic support to ensure policies like the All-Electric Buildings Act are both effective and equitable. As the state moves forward, thoughtful communication, regional sensitivity, and stakeholder collaboration will be essential in building trust and achieving shared environmental goals. This report offers a foundation for continued dialogue among policymakers, industry leaders, and the public.

BACKGROUND & METHDOLOGY

Study Overview:

NYS All-Electric Buildings Act Awareness & Perceptions

- In 2025, the New York State Builders Association (NYSBA) contracted with Research & Marketing Strategies, Inc. (RMS) to conduct an awareness and perception study on the New York State All-Electric Buildings Act among state residents.

- Enacted in 2023 as part of New York's Climate Leadership and Community Protection Act (CLCPA), the All-Electric Buildings Act mandates that most new buildings in the state be constructed ***without*** fossil fuel hookups.

    - Per the legislation, beginning January 1, 2026, all new residential buildings seven stories or fewer must be fully electric. The legislation mandates that systems such as heating, cooling, water heating, and cooking cannot rely on natural gas, propane, or oil. Exceptions exist for critical infrastructure and backup systems. For buildings over seven stories, the requirement takes effect July 1, 2028.

- To assess residents' awareness and perceptions, RMS conducted a statewide online survey featuring Likert scales, ratings, open-ended, and multiple-choice questions. A full copy of the survey is included in the Appendix.

- RMS collected responses over a three-week period. Fieldwork began with RMS ViewPoint panelists and was supplemented by a national sampling partner to ensure representation across targeted regions of New York State.

Sample Overview & Weighting Strategy

- A total of 1,238 residents participated in the survey yielding a margin of error of ±2.79 at the 95% confidence level. This aligns with industry standards and supports strong statistical reliability. All responses were cleaned, verified, and analyzed by RMS to ensure data quality.

- To account for New York State's geographic and demographic diversity, RMS grouped respondents into four broad regions. These regions consolidate the state's Economic Development Zones into clusters with similar characteristics. While more granular regional comparisons are available upon request, smaller subgroup sizes may limit statistical power. This streamlined, four-region approach allows for clearer statewide comparisons and a cohesive narrative.

- All results are weighted using a two-stage RIM (raking) weighting procedure. First, responses within each region were weighted to match age, gender, and income distributions from the United States Census Bureau American Community Survey. Second, each region was weighted to reflect its share of the total New York State population. This ensures the data is both demographically and geographically representative (the weighting matrices used are provided in the following slides).

- Percentages shown within the report are weighted.

Regional Groupings for Analysis and Reporting

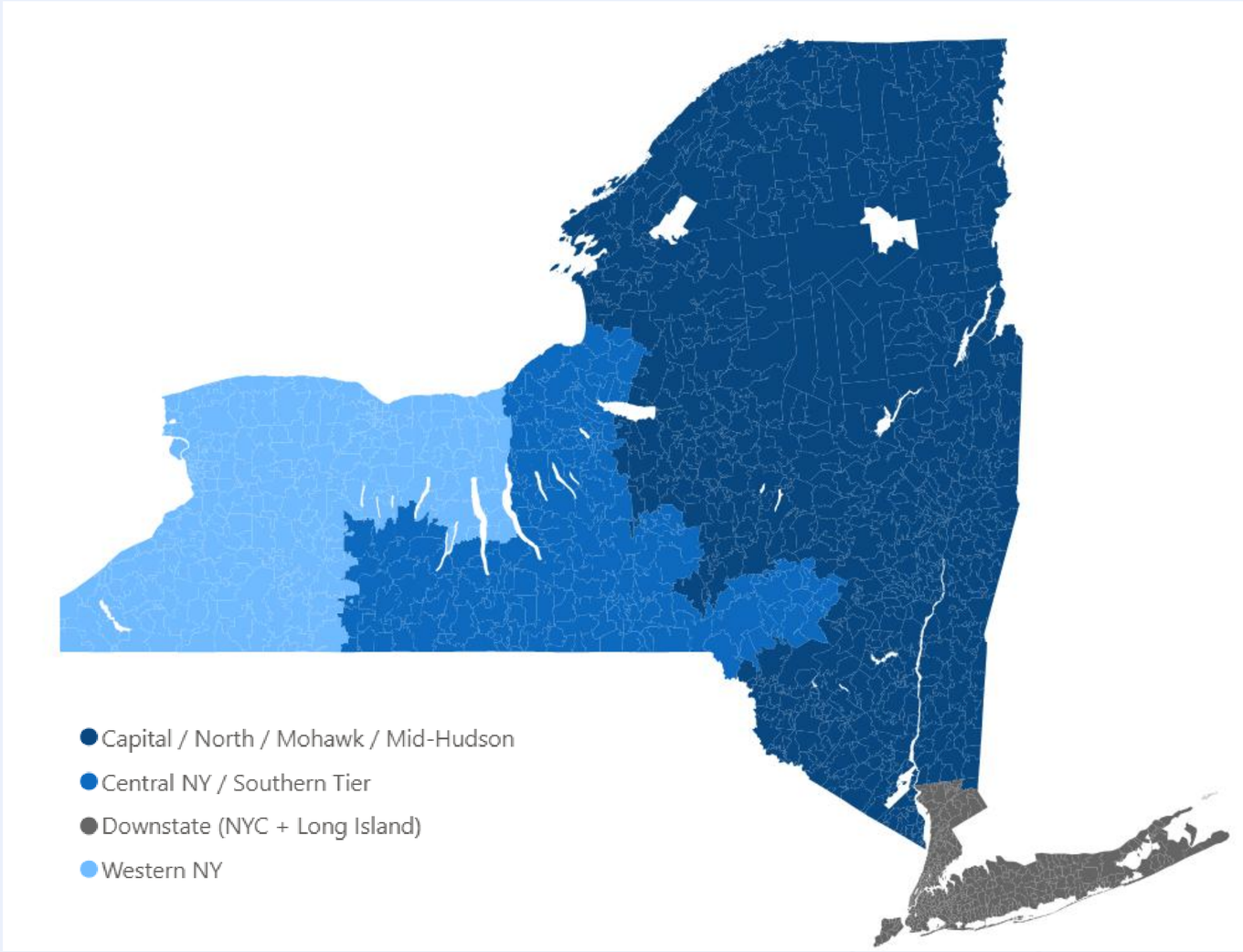
In designing regional groupings for analysis, RMS considered a balance between geographic clarity, statistical power, and analytic usability. Four groups emerged: (1) Capital / North / Mohawk / Mid-Hudson, (2) Central NY / Southern Tier, (3) Western NY, and (4) Downstate.

The Capital / North / Mohawk / Mid-Hudson region, while geographically the largest and most diverse, was retained as a single region to ensure both sample adequacy and comparability across the state. This region includes counties from several economic development zones.

While there are meaningful distinctions across these areas (e.g., urban vs. rural, income levels, and energy infrastructure), they are collectively distinct from the three other groupings used in this study. Maintaining this consolidated region allowed for:

- Robust sample sizes for weighting and statistical testing;
- Cleaner narrative framing for statewide reporting; and
- Consistent application of demographic weighting benchmarks drawn from the American Community Survey.

While the Capital / North / Mohawk / Mid-Hudson region may be broad, it reflects the remainder of the state that does not fall into one of the three major metro-oriented zones. Additionally, many counties within this group share characteristics such as more limited public transit access, reliance on residential heating fuel, and similar electrification infrastructure needs.



Participant Demographics

Weighting used to adjust data for each region

The tables below show both the raw survey data ("unweighted sample") and the adjusted figures ("weighted estimate") used to better reflect New York State's population. The unweighted sample show who responded to the survey. However, some groups, such as certain age or income brackets, may be over- or underrepresented. To correct for this, RMS used population benchmarks from the U.S. Census Bureau to adjust the results. These **weighted estimates** are used throughout the report to ensure findings accurately represent the views of the overall NYS population, not just survey respondents. The following slides show how these adjustments were applied for each of the four regions analyzed in this study.

Figure 1. Capital Region Weights

Income Range	Unweighted Survey Responses	Weights Used (% of NYS population)
Less than $25,000	13%	14%
$25,000-$49,999	17%	16%
$50,000-$74,999	23%	15%
$75,000-$99,999	15%	13%
$100,000-$149,999	16%	19%
$150,000-$199,999	11%	10%
$200,000 or more	5%	13%
Age		
18-24	3%	13%
25-34	8%	15%
35-44	15%	15%
45-54	19%	16%
55-64	27%	18%
65-74	26%	14%
75+	2%	10%
Gender		
Male	34%	50%
Female	65%	50%

Figure 2. Central Region Weights

Income Range	Unweighted Survey Responses	Weights Used (% of NYS population)
Less than $25,000	6%	18%
$25,000-$49,999	16%	19%
$50,000-$74,999	20%	17%
$75,000-$99,999	15%	13%
$100,000-$149,999	23%	17%
$150,000-$199,999	12%	8%
$200,000 or more	8%	8%
Age		
18-24	1%	14%
25-34	5%	15%
35-44	15%	14%
45-54	22%	14%
55-64	27%	18%
65-74	26%	14%
75+	4%	10%
Gender		
Male	25%	49%
Female	75%	51%

Figure 3. Downstate Region Weights

Income Range	Unweighted Survey Responses	Weights Used (% of NYS population)
Less than $25,000	14%	16%
$25,000-$49,999	20%	14%
$50,000-$74,999	17%	12%
$75,000-$99,999	10%	11%
$100,000-$149,999	23%	16%
$150,000-$199,999	9%	11%
$200,000 or more	7%	20%
Age		
18-24	6%	10%
25-34	16%	19%
35-44	25%	17%
45-54	19%	16%
55-64	19%	16%
65-74	12%	12%
75+	3%	9%
Gender		
Male	47%	48%
Female	54%	52%

Figure 4. Western Region Weights

Income Range	Unweighted Survey Responses	Weights Used (% of NYS population)
Less than $25,000	14%	17%
$25,000-$49,999	20%	19%
$50,000-$74,999	17%	17%
$75,000-$99,999	10%	13%
$100,000-$149,999	23%	17%
$150,000-$199,999	9%	9%
$200,000 or more	7%	8%
Age		
18-24	3%	12%
25-34	8%	16%
35-44	14%	15%
45-54	19%	15%
55-64	27%	18%
65-74	26%	14%
75+	2%	10%
Gender		
Male	34%	49%
Female	66%	51%

Regional Scale Factors for Weighting Statewide Estimates

To ensure the survey results accurately reflect the New York State population, a two-stage weighting process was applied:

Stage 1: Within-Region Weighting

- Responses were weighted within each region to align with U.S. Census Bureau benchmarks for age, gender, and income. This step corrected for demographic imbalances and ensured representativeness at the regional level (see prior slides for details).

Stage 2: Regional Scale Weighting for Statewide Estimates

- Rather than re-weight all responses to a single statewide demographic profile (which can distort region-specific adjustments) RMS applied a **regional scale factor**. This scale factor reflects each region's share of the total New York State population.
- This approach preserves regional demographic accuracy and ensures that each region contributes to the statewide results in proportion to its actual population size. It also avoids the instability that can result from overcorrecting across highly diverse regions.

Figure 5. Statewide Scale Factors for Rebalancing Statewide Estimates

Grouping/Region	Sample	NYS Weights	Scale Factor
▪ Capital / North / Mohawk / Mid-Hudson	20%	13%	**0.66**
▪ Central NY / Southern Tier	37%	5%	**0.14**
▪ Downstate (NYC + Long Island)	21%	72%	**3.42**
▪ Western NY	22%	10%	**0.44**

FINDINGS

Participant Home Ownership

Across New York State, clear regional differences emerged in housing characteristics that reflect broader economic, geographic, and demographic patterns. Downstate stands out with a higher proportion of renters and smaller home sizes, suggesting denser, urban environments and a housing stock dominated by multi-family units. Despite having more newer homes on average, Downstate residents report the longest time spent in their homes suggesting strong ties to community or limited mobility due to housing costs. The Capital Region reflects a more suburban or rural profile with larger homes, older housing stock, and a higher rate of owner-built home, indicating longer-standing ownership and slower housing turnover. Central New York shows signs of a more transitional housing market with the lowest self-build rate, smaller homes, and shorter time in homes potentially reflecting younger households or more frequent moves. Western New York presents a blend of these patterns where homes are older and slightly larger than the state average while residents report stable, long-term occupancy. Overall, these regional trends highlight how housing conditions are shaped by factors such as density, affordability, and historical development patterns offering important context for policy, planning, and electrification initiatives.

Figure 6. Housing Stock Overview by Region

Question	Capital	Central	Downstate	Western	NYS
▪ **% who built their home in study**	19%	11%	30%	23%	16%
▪ **Average age of home**	66 years	55 years	52 years	62 Years	60 years
▪ **Average time in home**	20 years	16 years	21 years	18 Years	18 years
▪ **Average Square Ft. of Home**	2,140	1,807	1,712	1,779	1,846
▪ **% of renters in study**	27%	13%	48%	27%	19%

Gas Dominates Appliance Energy Use, but Regional Differences Emerge

Natural Gas remains the primary energy source for most major appliances in New York, particularly outside of Downstate. Downstate stands out for higher electric use as well as greater "Don't Have" responses and lower gas reliance potentially reflecting an urban infrastructure. Data suggests that electrification potential may vary greatly by region depending on current appliance mix and housing stock.

Furnace

- Gas dominates across all regions except Downstate where reliance drops to 40%. "Don't Have" (33%) responses are notably higher potentially due to multifamily dwellings or landlord-managed systems. Western NY has the highest gas furnace use at 71%.

Dryer

- Most respondents report using electric dryers, especially in the Central (69%) and Capital (62%) regions. Western NY stands out with 37% gas use – higher than other regions. Downstate again shows high "Don't Have" (33%) reinforcing infrastructure and housing-type differences in urban areas.

Oven

- Gas use is highest in Downstate (56%) but also prominent across other regions. Central NY has the highest electric oven use (57%).

Stove

- Downstate (61%) again leads in gas stove usage while Central and Capital (both 43%) show more electric use. This pattern mirrors the oven trends and highlights entrenched gas use for cooking.

Water Heater

- Gas is the dominant energy source statewide (62%) with especially high usage in Western (64%) and Central (64%) NY. Downstate shows the most variation with only 35% using gas and 25% reporting no in-unit water heater – again, consistent with multi-unit housing patterns.

Fireplace

- Most respondents do not have fireplaces (52% statewide) with the highest non-ownership in Downstate (70%).

Figure 7. Appliance Energy Source Used in Home

Region/Energy Source	Gas (%)	Electric (%)	Unsure (%)	Don't Have (%)	Other(%)
Furnace					
Capital	63	11	8	6	11
Central	68	13	9	4	5
Downstate	40	14	11	33	3
Western	71	13	4	7	5
NYS	67	14	5	8	7
Dryer					
Capital	25	62	3	7	3
Central	23	69	3	5	0.4
Downstate	26	34	5	33	0.7
Western	37	52	4	8	-
NYS	28	60	2	8	0.7
Oven					
Capital	45	48	2	3	2
Central	41	57	0.8	0.6	0.8
Downstate	56	30	8	6	0.7
Western	48	46	1	4	1
NYS	46	49	2	1	1
Stove					
Capital	51	43	3	2	2
Central	54	43	0.8	0.7	2
Downstate	61	28	8	4	0.3
Western	53	42	2	1	2
NYS	50	46	2	1	1
Water Heater					
Capital	49	37	6	4	3
Central	64	27	6	2	2
Downstate	35	24	14	25	3
Western	64	23	7	4	2
NYS	62	26	5	5	2
Fireplace					
Capital	20	9	2	54	16
Central	17	18	1	50	15
Downstate	9	11	6	70	4
Western	16	13	2	58	11
NYS	20	10	2	52	17

Household Energy Systems:

Open-End Response Summary

For those that shared a response of “other,” they were asked to share what kind of energy source powers each appliance. The open-ended responses underscore the complexity and diversity of home energy configurations across New York State. While there is clear adoption of some newer systems (e.g., geothermal, electric heat pumps), many households cited they still rely on legacy fuels such as oil, propane, and wood. Wood-burning appliances remain part of residential heating routines particularly for fireplaces and secondary heating.

- Wood-burning remains prevalent, particularly in fireplaces, often cited as either primary or supplemental heat.
- Oil and propane continue to be common fuel sources especially for water heating and cooking appliances.
- Geothermal systems, while less frequent, appear in both heating and water systems indicating some adoption of renewable technologies.
- A subset of respondents live in multi-family or condo buildings, which rely on shared heating and appliance infrastructure.
- Limited adoption of modern alternatives like induction cooking, heat pump dryers, or solar-based systems was evident in the open-ended responses.

Data Shows Gas is Preferred Energy Source

Respondents were asked to indicate their **preferred energy source for common household appliances**. Results show that gas remains the preferred option for many appliances (especially heating and cooking), though preferences vary notably by region. Downstate residents consistently show more neutrality or openness with higher "no preference" rates and lower gas loyalty.

Furnace

- Gas is strongly preferred statewide (57%), especially in Western (61%) and Central NY (58%). Downstate shows more mixed attitudes with only 39% preferring gas and the highest rate of no preference (42%) likely reflecting greater infrastructure variability or rental housing dynamics.

Dryer

- Electric dryers are preferred statewide (53%), particularly in Capital and Central NY (52%). Downstate again stands out: only 23% prefer gas while 34% have no preference.

Oven

- Gas remains the dominant preference (49% statewide), especially in Central (53%) and Western (48%). Downstate shows a more balanced view (42% gas, 32% electric, 27% no preference) indicating greater diversity in cooking setups or flexibility in preferences.

Stove

- Gas is still favored statewide (55%) with strongest support in Downstate (58%). Electric stove support is weaker (34% statewide), and "no preference" is lowest overall (12%) suggesting stronger emotional or functional attachments to stoves compared to other appliances. This sentiment is corroborated in open ended comments.

Water Heater

- Gas is again the preferred choice (51% statewide) with especially strong support in Western (57%) and Capital (55%). Downstate is the only region with split preferences (30% gas, 30% electric) and the highest "no preference" at 40%, pointing to more flexibility or lack of direct interaction due to rental housing.

Fireplace

- No preference dominates this category across all regions (48% statewide), especially in Downstate (58%) and Western (51%). Where preferences exist, gas and electric are evenly split reflecting more aesthetic or optional use.

Figure 8. Appliance Energy Source Preference

	Gas (%)	Electric (%)	No Preference (%)
Furnace			
Capital	53	21	26
Central	58	25	17
Downstate	39	19	42
Western	61	20	19
NYS	57	22	22
Dryer			
Capital	27	52	21
Central	34	52	14
Downstate	23	43	34
Western	37	46	17
NYS	28	53	19
Oven			
Capital	43	41	17
Central	53	37	10
Downstate	42	32	27
Western	48	39	14
NYS	49	38	13
Capital			
Central	49	35	16
Downstate	58	34	8
Western	45	29	27
NYS	55	34	11
Capital	55	33	12
Water Heater			
Capital	55	33	23
Central	52	32	16
Downstate	30	30	40
Western	57	26	18
NYS	51	29	21
Fireplace			
Capital	24	23	53
Central	39	20	41
Downstate	18	24	58
Western	28	21	51
NYS	33	19	48

Appliance Preferences – Statewide Themes from Open End Responses

Across all regions and appliance types, New Yorkers' preferences reflect a balance between modernization and cost, safety and familiarity, and autonomy versus situational constraints (i.e. renter whose landlord selects appliances). While electric preferences were most often tied to themes of safety, sustainability, and future-readiness, gas was overwhelmingly associated with cost-efficiency, reliability in outages, and existing infrastructure.

Electric Preferences

Respondents referenced solar readiness, heat pump benefits, and a desire to transition off of fossil fuels. They tended to be motivated by safety concerns with gas, perceived environmental benefits, and modernization: "It's safer and more eco-friendly," shared a resident who lives in Manhattan. Another Wayne County respondent added, "Electric is more efficient, and we have solar panels."

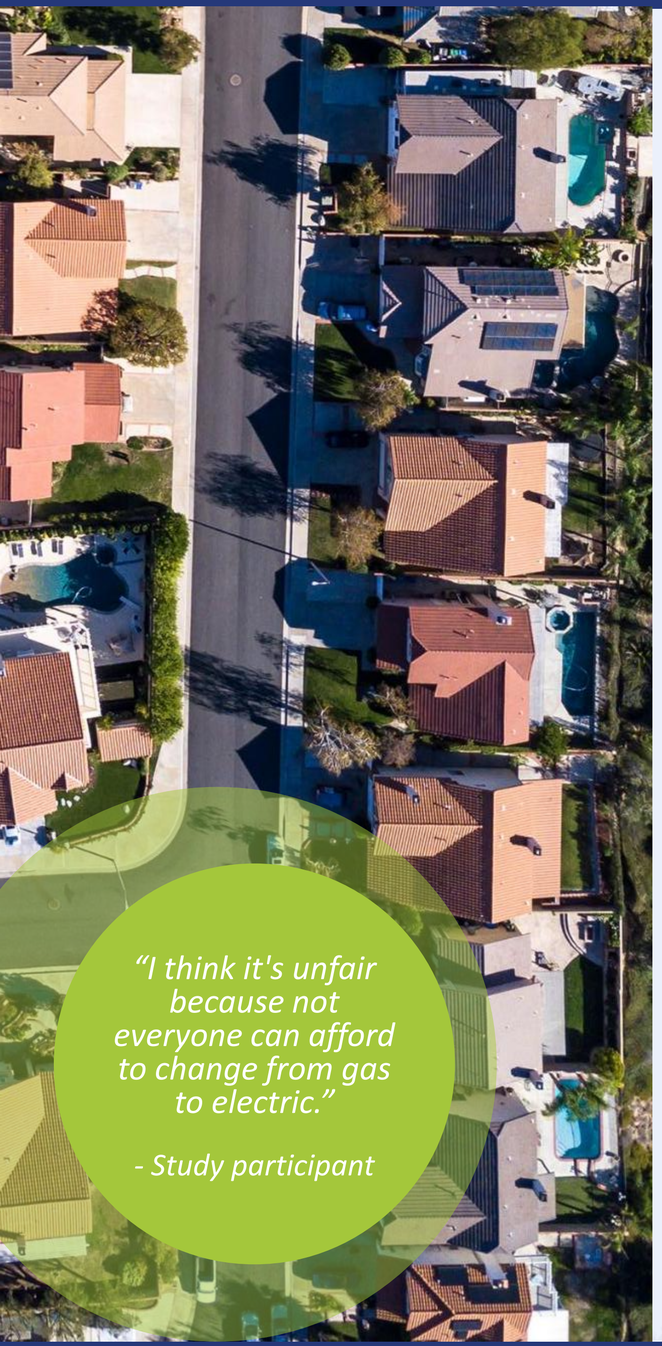
Gas Preferences

Preference for gas appliances was driven by lower utility costs, reliability, and better cooking/heating control. In addition, many mentioned back up power and use of gas when there is a power outage; as one Onondaga County resident shared, "Gas still works when the power goes out." An individual from Madison County added, "Prefer gas over electric." In addition, an Erie County resident voiced, "Gas is cheaper and more reliable than electric."

No Preference / Indifferent

Those who shared they were indifferent or did not have a strong preference for gas or electric generally were urban renters living in multi-unit buildings, especially in NYC. These residents often discussed the selection of "no preference" was motivated by a lack of control or general apathy; as one Bronx resident noted, "I rent—not my decision." Others took a more practical approach seeking the most efficient/cost-effective solution based on their context, like one individual from Monroe County commented, "Would go for most efficient and cost efficient," and another from Albany County, "Whichever is cheaper."

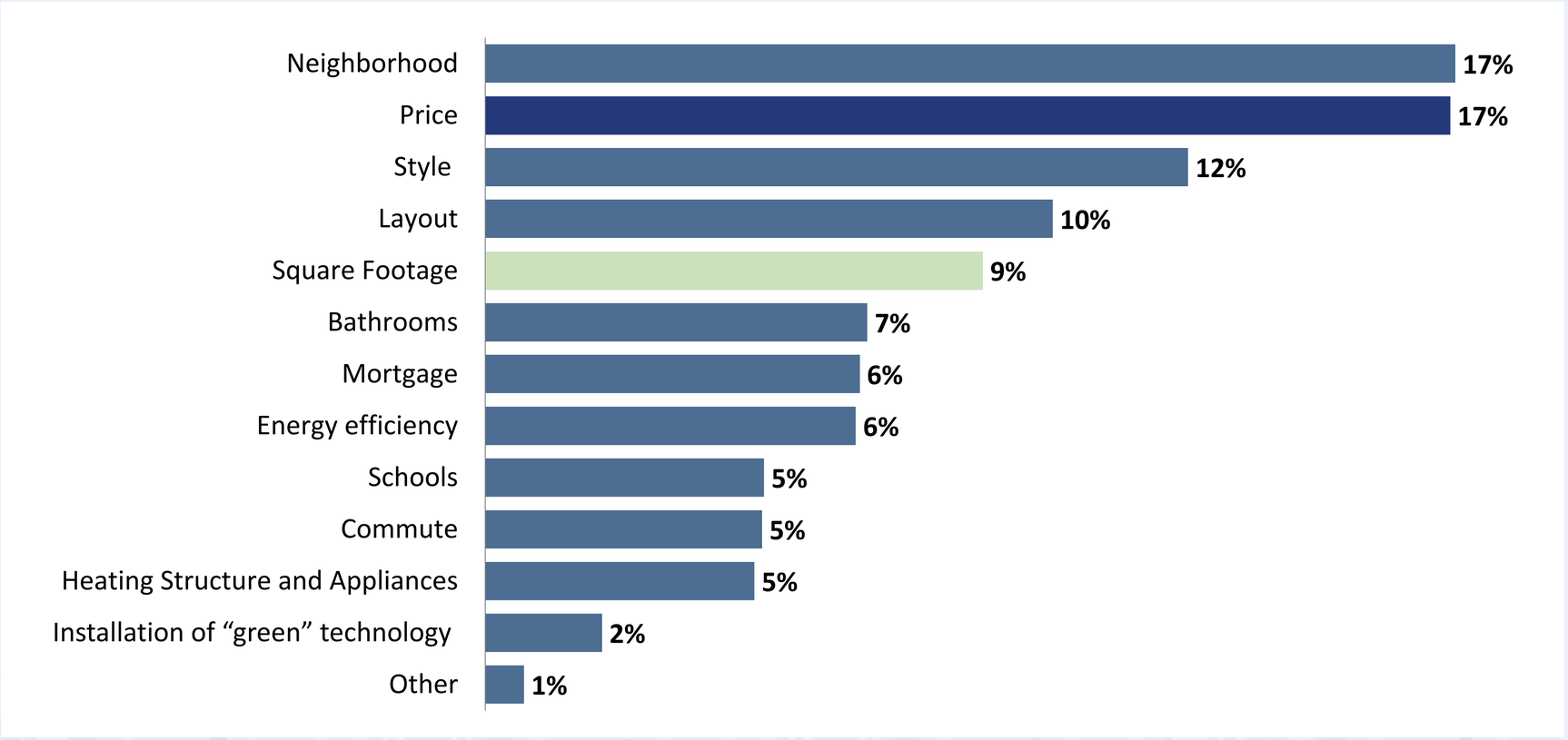
Overall, preferences are deeply tied to context with factors such as financial means, infrastructure access, landlord policies, and personal safety beliefs shaping decision-making. While electric options are seen as safer and more modern, especially among homeowners with solar investments, gas remains dominant for many due to reliability and familiarity. The Appendix contains a further breakdown by appliance type.



Neighborhood and Price Top the List of Homebuying Priorities

When asked what factors most influence homebuying decisions, respondents prioritized neighborhood and price (each cited by 17%) as their top considerations. Traditional elements like style, layout, and square footage also ranked highly, reflecting a focus on familiarity and functionality. By contrast, energy efficiency (6%) and the installation of "green" features (2%) were much lower priorities. This suggests that while sustainability may be valued, it is not yet a primary driver in most homebuying decisions, especially when weighed against cost and livability concerns.

Figure 9. Most Influential Factors when Making Homebuying Decision



Ease of Maintenance and Cost Savings Drive New Home Decisions

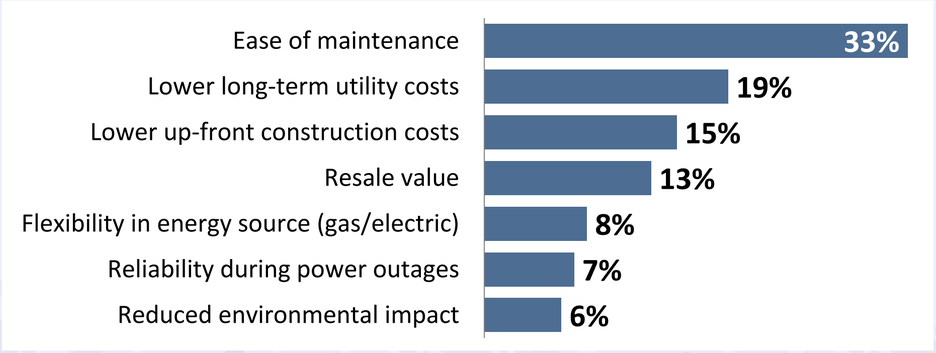
When considering priorities for building a new home, respondents overwhelmingly emphasized ***practical and financial considerations***. The top factor **was *ease of maintenance*** (33%), followed by ***lower long-term utility costs*** (19%) and ***lower up-front construction costs*** (15%). These results suggest that homeowners are focused on reducing ongoing burdens and maximizing affordability during the building process. ***Resale value*** was also an important consideration (13%) reflecting longer-term investment thinking.

By contrast, features more commonly associated with sustainability or energy efficiency, such as ***flexibility in energy source*** (8%), ***reliability during power outages*** (7%), and ***reduced environmental impact*** (6%), ranked lower. **This indicates that while environmental factors are not dismissed, they remain secondary to cost, maintenance, and livability in the homebuilding decision-making process.** Regional analysis reveals important nuances. While ease of maintenance ranked highest in every region, priorities beyond that varied:

- Central and Western NY respondents placed greater emphasis on resale value and utility savings reflecting a cost-conscious mindset tied to long-term investment.
- Downstate residents stood out for their interest in energy source flexibility (17%) – higher than in any other region – potentially reflecting infrastructure limitations, urban density, or greater awareness of electrification policies.
- Capital Region respondents showed a more balanced profile with moderate interest in sustainability, cost, and reliability suggesting a broader set of considerations driving decision-making in that area.

These findings suggest that there are differences regionally in priorities when building a home.

Figure 10. Priorities When Building a Home

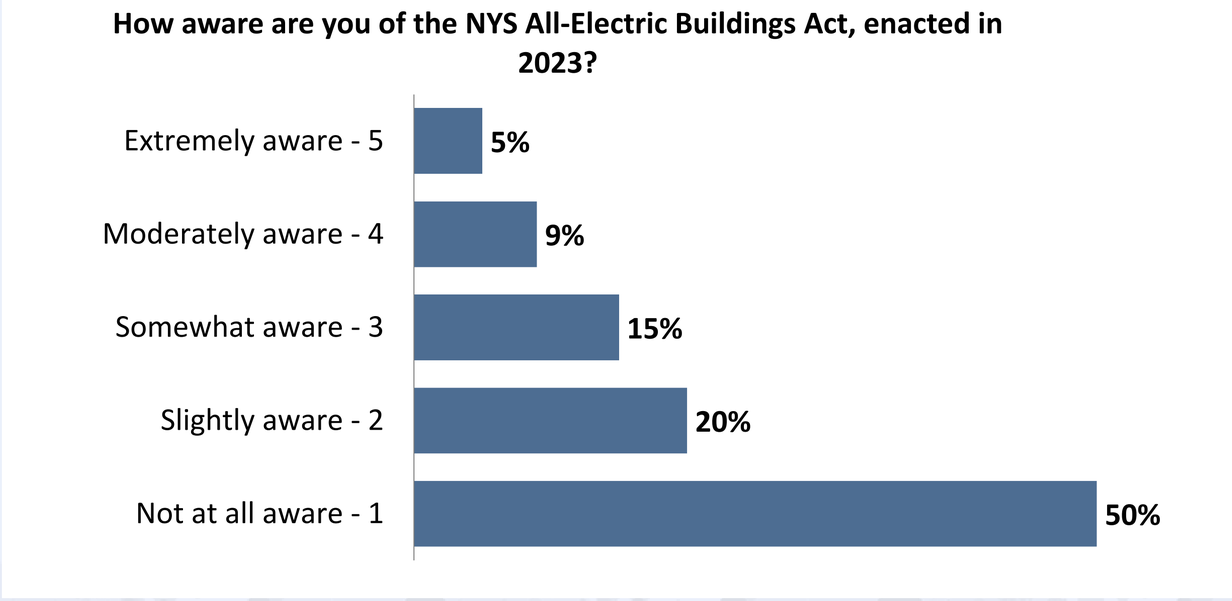


Priority	Capital	Central	Downstate	Western
Lower up-front construction costs	18%	12%	15%	17%
Lower long-term utility costs	13%	18%	16%	19%
Reduced environmental impact	11%	10%	8%	5%
Flexibility in energy source	7%	5%	17%	9%
Reliability during power outages	10%	4%	9%	11%
Resale value	12%	22%	13%	13%
Ease of maintenance	28%	30%	22%	27%

Awareness of All-Electric Act is Low Among NYS Residents

Awareness of the NYS All-Electric Buildings Act, enacted in 2023, remains very low across the state (2.2 out of 5.0 mean score). Half of all respondents (50%) reported being not at all aware of the legislation, and an additional 20% were only slightly aware. Only 14% of residents indicated they were moderately or extremely aware suggesting that **despite its policy significance, the Act has not yet reached most New Yorkers in a meaningful way**. These findings highlight a significant communication and outreach gap, particularly as the implementation date for residential buildings approaches in 2026. Awareness of the NYS All-Electric Buildings Act is low across all regions, and some key insights include:

- Central NY / Southern Tier residents reported the lowest overall awareness, with a mean score of 1.8 out of 5.0. 55% said they were not at all aware, and only 4% rated their awareness at the highest level.
- The Capital / North / Mohawk / Mid-Hudson region followed closely with a mean score of 2.0 out of 5.0 and 49% indicating no awareness.
- Downstate (NYC + Long Island) and Western NY both reported slightly higher awareness, each with a mean score of 2.2 out of 5.0, and a more even distribution across the scale. Downstate had the highest percentage of respondents (9%) who said they were extremely aware – nearly double other regions. While no region reported high overall awareness, Downstate and Western NY may be slightly ahead potentially due to greater exposure to electrification conversations, dense urban development, or policy outreach. Still, these differences are modest reinforcing that public awareness of the law remains a major challenge statewide.



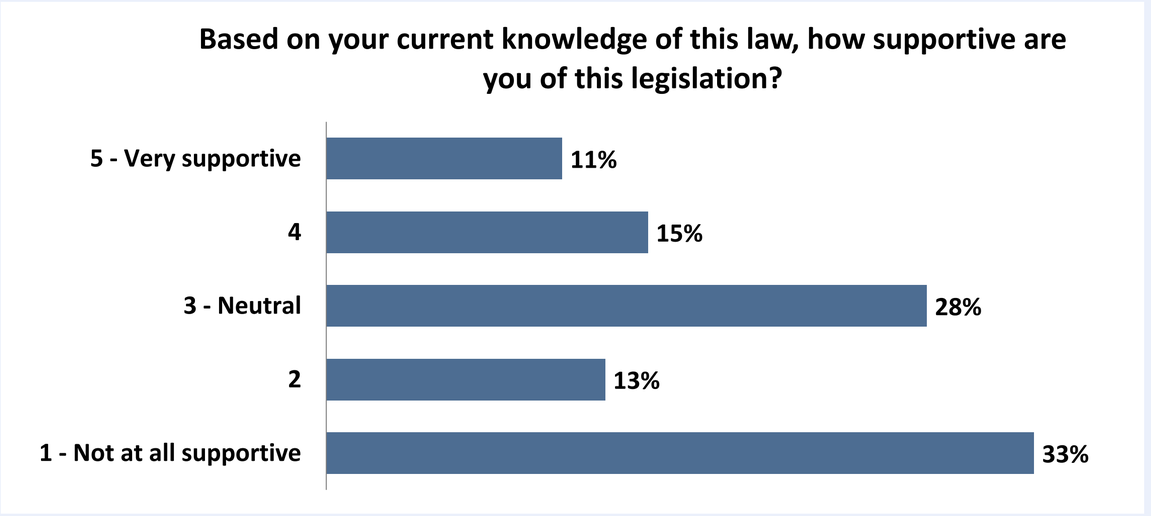
Region	1	2	3	4	5	Mean
▪ **Capital / North / Mohawk / Mid-Hudson**	49%	20%	16%	11%	4%	2.0
▪ **Central NY / Southern Tier**	55%	23%	12%	7%	4%	1.8
▪ **Downstate (NYC + Long Island)**	49%	14%	18%	10%	9%	2.2
▪ **Western NY**	42%	20%	20%	13%	4%	2.2

Awareness Is Low, Support Is Limited: New Yorkers on All-Electric Buildings Act

Support for the NYS All-Electric Buildings Act varies by region with Downstate residents demonstrating the highest average support (mean = 3.1 out of 5.0), compared to 2.5–2.8 in other parts of the state.

- Downstate (NYC + Long Island) stands out with stronger positive sentiment: 36% rated their support at a 4 or 5 and 25% rated their support at the bottom two levels. This suggests higher policy alignment or greater exposure to electrification messaging. Or, as other data suggest, largely indifferent due to high rental and multi-family units with limited choice / landlord controlled.
- Capital / North / Mohawk / Mid-Hudson had a mean of 2.8 with a relatively even spread across the scale. 36% responded neutrally, indicating some indifference in this region.
- Central NY / Southern Tier and Western NY both averaged 2.5 with the highest percentages of low support (rating 1 or 2) at 37% and 36% respectively. These regions show more skepticism or lack of enthusiasm toward the law.

Overall, the data suggest that support is limited and regionally based with greater positivity in Downstate areas and more hesitancy in Upstate regions.



Region	1	2	3	4	5	Mean
Capital / North / Mohawk / Mid-Hudson	25%	12%	36%	14%	13%	2.8
Central NY / Southern Tier	37%	13%	26%	12%	13%	2.5
Downstate (NYC + Long Island)	18%	7%	39%	19%	17%	3.1
Western NY	36%	11%	27%	14%	12%	2.5

Supporters v. Non-supporters of Legislation

Supporters

Respondents in this region who expressed support for the policy often cited environmental urgency, modernization, and long-term health and safety as factors why they support the legislation.

- *"It would be better for the environment"*
- *"Well, anything that's better for the environment has got to be good. Even if I like a gas stove, I can go without if needed. Doing this for my kids and grandkids."*
- *"It's overall better for the environment"*
- *"I'm scared of anything connected to gas pipelines. Also, electricity prices are so low in WNY that I'd favor that."*

Non-Supporters

Disapproval was generally grounded in economic concerns, skepticism about feasibility, and a desire for individual freedom of choice regarding appliances.

- *"I think people should be allowed to have whatever they want in their homes. Forcing them to have one and not options is wrong."*
- *"Too restrictive and does not give homeowner the option to decide for themselves."*
- *"I understand the why but question the actual impact it would have on how few new homes are built."*
- *"All for climate protections but think this legislation is a bit of a stretch and could do more beneficial things for the environment than focus on homes. We need so much housing, now isn't the time for more regulations"*
- *"What if you're not financially prepared to make those changes right away? If i had not filled out this survey, I would not have even been aware that this was coming down the pipeline."*

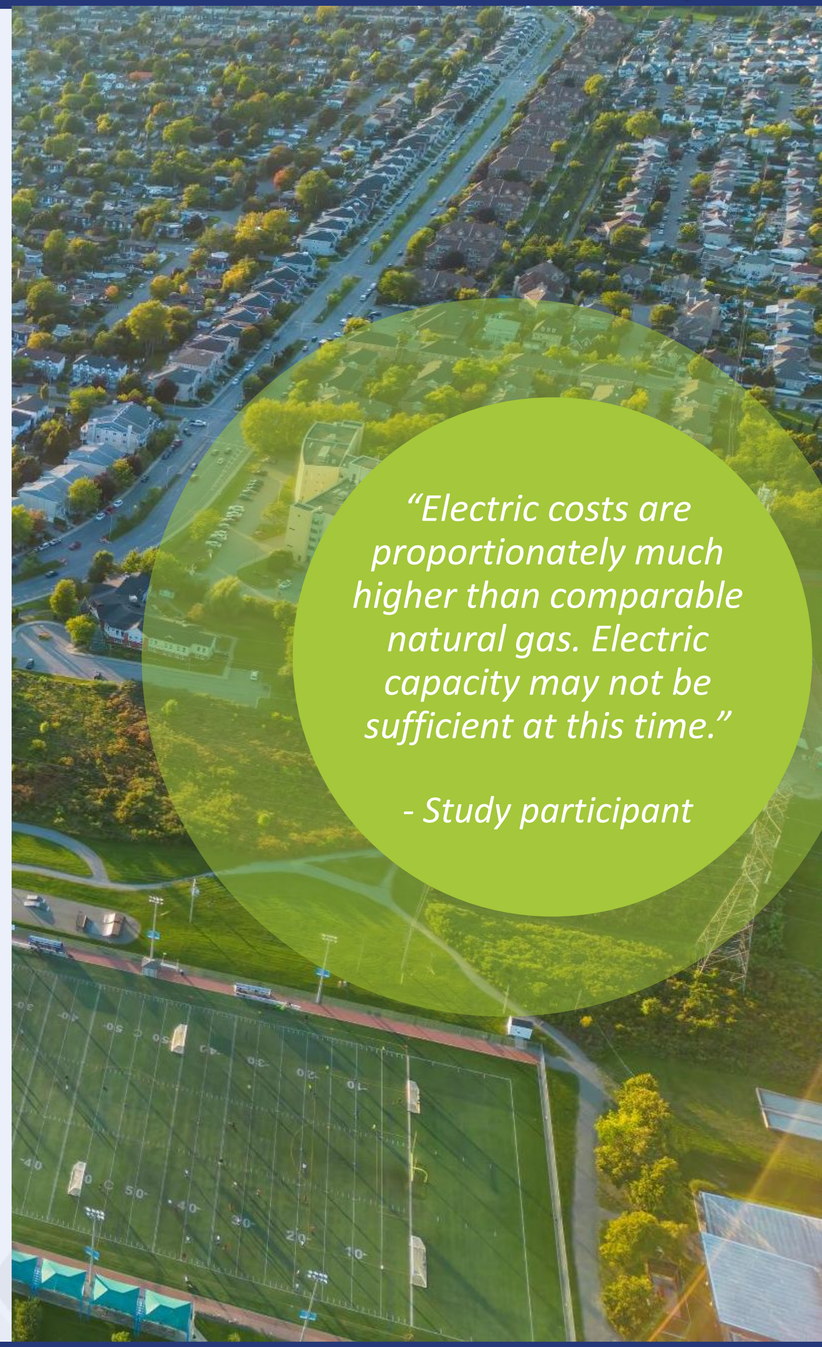
Only 4% Indicate Strong Intent to Buy a New Construction Home in 2026

When asked about their likelihood of purchasing a brand-new construction home in 2026, the overwhelming majority of respondents (81%) indicated they are ***not at all likely*** to do so. Only 4% selected either a 4 or 5 on the scale, suggesting limited purchase intent for survey participants (mean score of 1.4).

This sentiment is consistent across most regions with particularly low interest seen in Central NY / Southern Tier (mean = 1.2) and Western NY (mean = 1.5). The Downstate region shows comparatively higher interest (mean = 2.2), but overall demand for new construction appears quite limited statewide. These findings may reflect broader concerns about affordability, economic uncertainty, or preferences for existing housing stock. No longitudinal or comparative data is available, so these findings should be interpreted with caution when evaluating potential trends in new home construction.

How likely are you to purchase a brand-new construction home in 2026?

Region	1	2	3	4	5	Mean
▪ **Capital / North / Mohawk / Mid-Hudson**	67%	14%	10%	3%	5%	1.7
▪ **Central NY / Southern Tier**	87%	8%	3%	1%	0.7%	1.2
▪ **Downstate (NYC + Long Island)**	4%	13%	21%	8%	12%	2.2
▪ **Western NY**	76%	10%	7%	3%	4.1%	1.5

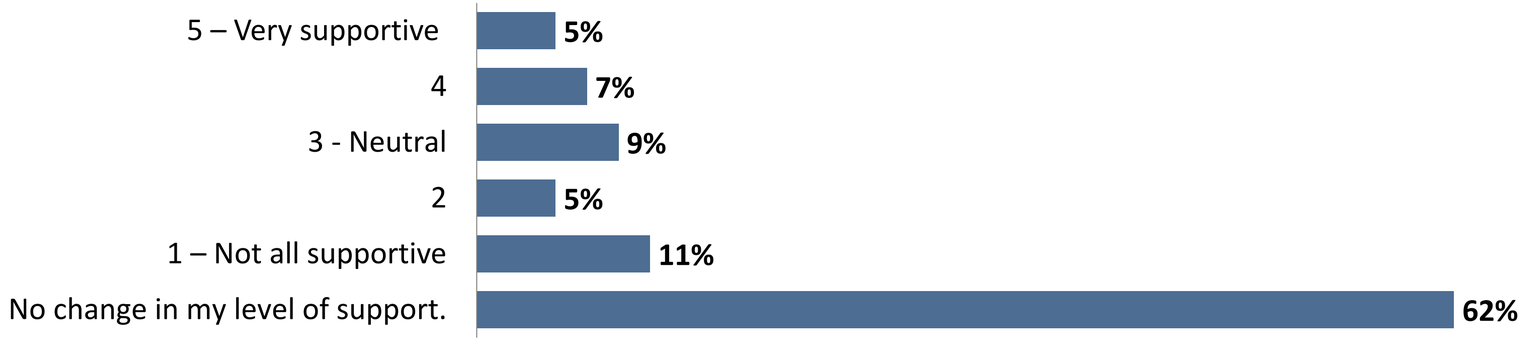


New Construction Homebuilding Plans May Shift Support on the All-Electric Buildings Act

When asked whether their support for the building electrification legislation would change if they were planning to build a new home in 2026, the majority of respondents (62%) indicated no change in support. This suggests that for most individuals, their views on the legislation are stable regardless of personal building plans. However, a substantial share of respondents expressed either strong opposition (16% selecting “1 – Not at all supportive” or a 2) or strong support (13% selecting “5 – Very supportive” or 4), highlighting polarized views on the legislation.

Regionally, average support scores were relatively consistent ranging from a low of 2.6 in Western NY to a high of 3.1 in Downstate (NYC + Long Island). Central NY / Southern Tier reported the highest rate of “no change” responses (69%). While these findings suggest limited influence of personal homebuilding plans on support levels, a meaningful subset of respondents may reconsider their position if they were directly affected by the law.

What level of support would you provide if you were planning on building a new home in 2026?

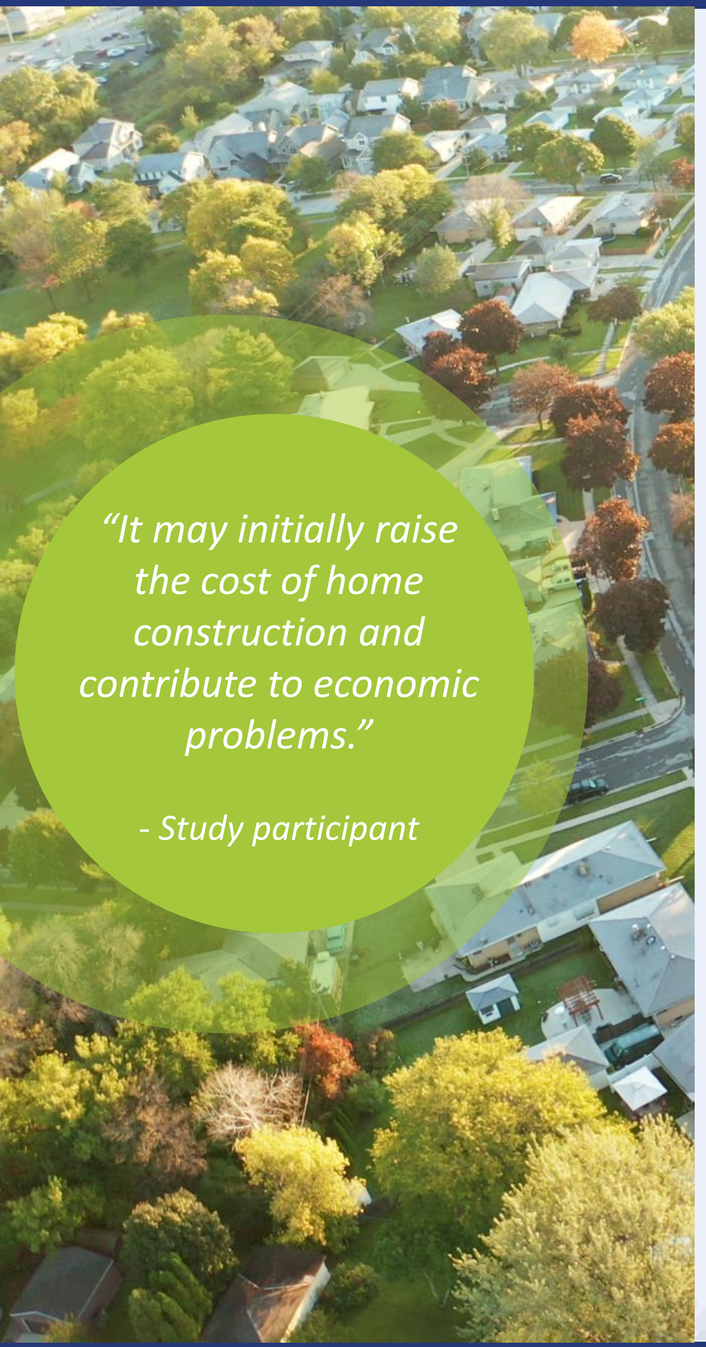


Region	1	2	3	4	5	No Change	Mean
▪ Capital / North / Mohawk / Mid-Hudson	14%	5%	14%	9%	8%	51%	2.8
▪ Central NY / Southern Tier	8%	4%	9%	7%	4%	69%	2.9
▪ Downstate (NYC + Long Island)	6%	3%	15%	13%	3%	60%	3.1
▪ Western NY	12%	8%	13%	7%	3%	58%	2.6
▪ NYS	11%	5%	9%	7%	5%	62%	2.7

Concerns Regarding Utility Costs, Reliability, and Practicality Leads to Reduced Support of Legislation

Across all regions, sentiment slightly skewed toward opposition as individuals learned more about the policy with most participants voicing concerns or outright resistance to the transition to all-electric homes. While a few individuals mentioned potential benefits (especially environmental or cost savings over time), these voices were outnumbered by those expressing doubts. The most consistent concerns were about cost, reliability, forced mandates, and the practicality of electric technology in New York's cold climate.

Change in Support	Summary Across Regions
Decreased Support	▪ Most participants expressed strong resistance due to higher upfront costs, fear of power outages, loss of choice, and skepticism about policy impacts. Many felt the change was **mandated without enough planning or infrastructure** and feared **being dependent on a fragile grid**.
Neutral or Mixed	▪ A few participants were open to the idea but voiced **conditional support**, such as needing more reliable battery storage or wanting the **option to opt-in** rather than being required.
Increased Support	▪ A minority voiced **long-term optimism** mentioning reduced energy bills, improved technology, or environmental benefits — but these comments were **rare and often paired with caveats** about implementation challenges.



Stable Housing Plans Across Regions, but Appliance Priorities Vary

Across NYS, only 13% of respondents indicated they are planning or considering moving into a different (non-new construction) home in 2026. Regionally, the share of respondents planning to move into a different (non-new construction) home in 2026 remains low, ranging from 14% in Western NY to 20% in Central NY / Southern Tier. This suggests consistently low housing mobility throughout the state.

However, among all respondents, appliances still play a role in decision-making for many. While 25% rated appliances as insignificant in their home decision process, 27% rated them as important (scores of 4 or 5) and 32% were neutral. The importance placed on appliances in home decision-making varies more widely by region. In Central NY / Southern Tier, appliances are least influential (mean = 2.1) with nearly half rating their importance as a 1. In contrast, Downstate respondents place the highest importance on appliances (mean = 3.0), followed closely by Western NY (2.9). 25% of Western NY residents rated appliance importance as a 5, more than any other region. This suggests that even if most residents aren't moving, appliance-related policies, such as the All-Electric Buildings Act, resonate with many even if not directly impacted.

Are you moving in 2026?	Yes	No
▪ Capital / North / Mohawk / Mid-Hudson	17%	84%
▪ Central NY / Southern Tier	20%	80%
▪ Downstate (NYC + Long Island)	15%	84%
▪ Western NY	14%	86%

How Important are appliances in your decision making (1=not at all, 5=very).	1	2	3	4	5	MEAN
▪ Capital / North / Mohawk / Mid-Hudson	26%	7%	42%	7%	17%	2.7
▪ Central NY / Southern Tier	46%	16%	24%	7%	8%	2.1
▪ Downstate (NYC + Long Island)	10%	17%	46%	19%	9%	3.0
▪ Western NY	7%	-	54%	8%	25%	2.9

Statewide Perceptions of Legislation Benefits

When discussing the benefits of this legislation, supporters view electric appliances as cleaner, safer, and increasingly cost-effective. Supporters commented that environmental consciousness is growing, particularly when paired with concerns about climate and public health. Five benefits emerged from the data, which are explained below.

1. Efficiency & Long-Term Cost Savings
Respondents frequently pointed to the efficiency of electric appliances with many believing that while initial costs may be higher, electric systems offer better long-term affordability and energy savings. This belief was especially common in references to electric dryers and stoves. Some shared, "[electric appliances are] cheaper in the long run," and "cost-efficient and easier to maintain."

2. Environmental and Health Motivation
Environmental benefits emerged as a top theme, particularly among those who see electrification as part of a broader move toward sustainability and clean energy. Some mentioned reducing fossil fuel use and emissions while a few highlighted health-related advantages, like improved indoor air quality. "Better for the environment," and "Safer for indoor air," shared two participants.

3. Ease of Use and Convenience
Electric appliances were often described as easier to use and simpler to maintain than gas alternatives. Users valued fewer maintenance issues, faster installs, and greater ease of integration with modern homes. For example, electric stoves and ovens were often cited as being "plug-and-go" compared to gas. "No need to vent," "More modern and user-friendly," and "Simpler and safer," voiced several respondents.

4. Infrastructure Compatibility
Several comments indicated that electric appliances were the default or only option based on home infrastructure, particularly in multi-family dwellings or newer builds. Some respondents said they already used electric making it an easy choice, while others noted that gas lines were not available or allowed. "Electric is what we have", "No gas hook-up," and " my apartment won't allow gas," explained three respondents.

5. Safety
Safety emerged as a distinct theme, especially for those with children or concerns about gas leaks. Electric appliances were considered lower-risk with no open flames, combustion, or emissions making them more appealing for indoor use, especially fireplaces and stoves. As some shared, "no gas leak worries,""safer with kids," and "no flame or venting needed."

Statewide Perceptions of Legislation Concerns

When asked about the concerns of the legislation, responses were consistent across regions. The concerns largely related to cost, performance, technology, and perceptions that the legislation is politically motivated.

1. Increased Utility Costs
Many cited concerns that they felt their utility bill will increase substantially moving to all electric. Some mentioned the impact on affordable to low-income families, and fear that landlords will raise rents.

2. Performance
Many cited concerns about the electric grid not being able to support the increases in electricity demands. Others shared that during cold weather, they want a back-up gas powered system for reliability.

3. Government Overreach
Numerous respondents across all regions shared they felt this policy was an overreach of government authority. Many cited they want the freedom to pick their own appliance type.

4. Well-Meaning, But Misaligned Policy
Many felt that the policy has positive intentions, but the practicality of the policy calls it into question. For example, individuals shared that the policy may impact certain groups more than others. "'One size fits all' approach is neither wise, nor practical," commented one participant alluding to the vast diversity of NYS, housing infrastructure across the state, and the various rural/urban settings along with very different weather patterns.

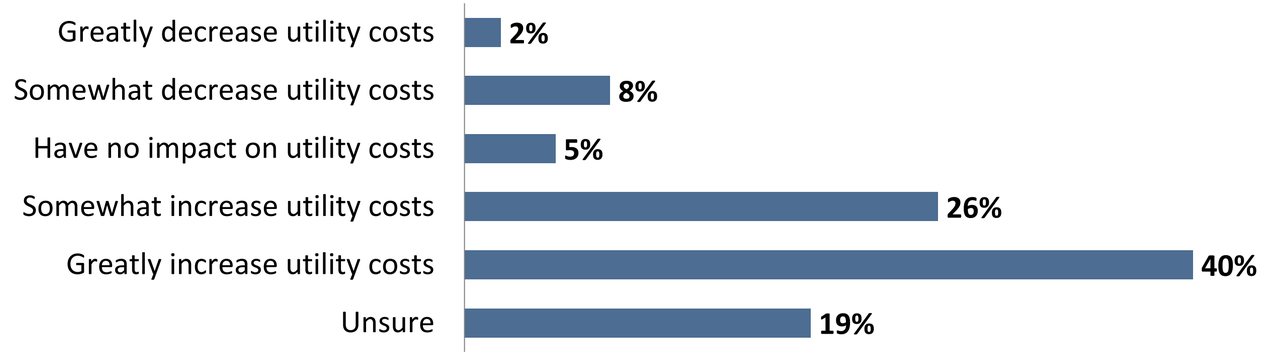
Most Expect Utility Bills to Rise Under All-Electric Mandate

When asked how the All-Electric Buildings Act would impact utility costs for homeowners, a majority of respondents (66%) anticipated an increase with 40% expecting a *great* increase and 26% anticipating *somewhat* of an increase. Very few respondents believed costs would decrease (only 10% total) while 19% were unsure.

This concern about rising utility bills was consistent across all regions. Central NY / Southern Tier showed the strongest expectation of cost increases (70%), followed by Capital/North (67%) and Western NY (62%). Downstate respondents were slightly more optimistic (53%), but skepticism still dominated.

These results suggest a broad perception that the electrification mandate may lead to higher household expenses, which could contribute to hesitancy or resistance to the policy particularly in upstate regions.

How do you believe this law will impact the cost of utility bills for homeowners?



Region	Capital / North / Mohawk / Mid-Hudson	Central NY / Southern Tier	Downstate (NYC + Long Island)	Western NY
Greatly increase utility costs	39%	43%	28%	40%
Somewhat increase utility costs	31%	24%	25%	22%
Have no impact on utility costs	8%	4%	14%	7%
Somewhat decrease utility costs	10%	7%	11%	9%
Greatly decrease utility costs	1%	2%	3%	3%
Unsure	11%	21%	19%	19%

Perceptions Why Utility Bills Will Increase

Many Downstate residents voiced significant concerns about the cost, reliability, and broader policy implications of transitioning to all-electric homes. One participant warned, *"Because once everything is electric you have no choice… the company knows this,"* reflecting fears of monopolistic pricing and reduced consumer options. Another echoed this, stating, *"Electric bills are astronomically high. It will only get worse."* The concern over financial burden was further highlighted with, *"Everything will be electric, the bills will drastically increase,"* and one individual observed: *"NYSEG said most of the utility bills are due to state-mandated fees."*

Reliability was another major theme. A resident remarked, *"The power lines on my block are old—very old,"* while others doubted electric's dependability compared to traditional sources, stating, *"Electric is inefficient and not reliable… Never lost gas."* There was also strong skepticism about the grid's capacity and policy decisions. One person stated plainly, *"Grid cannot handle… law of supply and demand,"* and another called it, *"a disaster waiting to happen."* Others saw the policy as driven more by political agendas than by practicality, saying, *"Politicians will prioritize [new homes] getting power… to justify the law,"* and *"Mandates may require expensive upgrades."*

Concerns about the technology itself surfaced as well, with one respondent stating, *"Electric heaters cost more and recover slower than gas,"* and another noting, *"All new infrastructure has to be financed."*

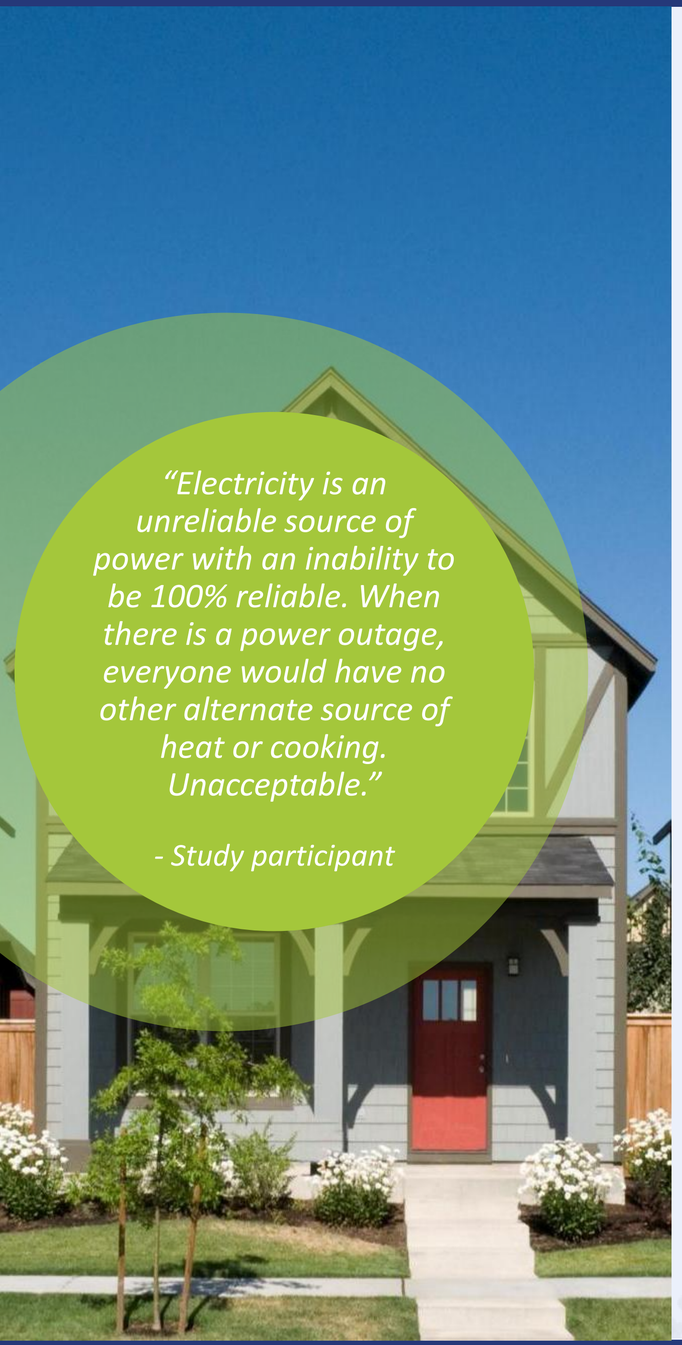
Perceptions Why Utility Bills Will Decrease

Several respondents highlighted a more optimistic perspective on the shift toward all-electric homes, emphasizing both long-term cost savings and environmental benefits. One individual expressed confidence in the evolution of energy sources, stating, *"Sustainable energy sources are only getting more reliable."* This sentiment was echoed by others who noted the financial upside including the view that *"over time, the overall cost of utilities will go down."*

Technology and performance improvements were key points of encouragement. One participant noted, *"Newer electric appliances are more efficient,"* while another emphasized the practical benefits of modern equipment: *"Heat pumps are more efficient."* This was supported by another observation: *"More energy efficient appliances cause less energy usage."*

Despite the acknowledgment of high upfront costs—*"Solar and geothermal have high upfront costs but low long-term bills"*—the long-term view was largely positive. One forward-thinking respondent shared their personal plan, stating, *"I will install solar panels and save a ton of money."*

Environmental benefits were also part of the appeal. One person emphasized the broader impact by saying, *"More environmentally friendly… will help in the long run."* Collectively, these responses reflect a sense of hopefulness that newer technologies, energy efficiency, and sustainability will ultimately lead to a better, more affordable future.



Statewide Perceptions of Concerns of Living in an All-Electric House

Across all regions, residents expressed significant concerns about transitioning to all-electric homes. **Cost** was a dominant theme with many worried that electrification would drive up utility bills and require costly home upgrades. As one Capital region participant noted, *"It will cost me a lot more."* Similar sentiments were echoed in Western NY: *"Yes—the cost. Gas is more efficient… It costs more to run electric."*

Reliability was another major worry, particularly in colder climates where power outages are more common. Respondents feared being left without heat or backup energy during emergencies: *"What about when the power goes out… it gets cold in January,"* shared a Capital respondent. Central NY residents voiced similar concerns, with one noting, *"Power outages… reliability in our climate."*

Performance issues, particularly around electric heat pumps and cooking appliances, were frequently mentioned. Participants questioned their effectiveness in extreme weather, with remarks like *"It's too cold for heat pumps,"* and *"Gas stove allows me to boil water during an outage."*

There was also a strong desire to retain **freedom and choice** in energy sources with many rejecting mandated electrification. *"I don't like not having a choice,"* said a Western NY respondent, while another in Central NY emphasized, *"Don't want my energy source mandated."*

Concerns about **policy and legislation** focused on distrust of government mandates, fear of future rate hikes, and the feeling that policies were out of touch with homeowners' realities. *"Utilities will force the government to allow rate hikes,"* was a commonly expressed sentiment.

Technology concerns such as *"single points of failure,"* costly equipment upgrades, and outdated infrastructure were often highlighted. Additionally, **environmental perspectives** were mixed, while some supported the shift for its climate benefits, others questioned whether electric generation still relied on fossil fuels: *"Fossil fuels used to generate electricity will harm the environment,"* noted a Capital region participant.

A more detailed breakdown by region can be found in the appendix.

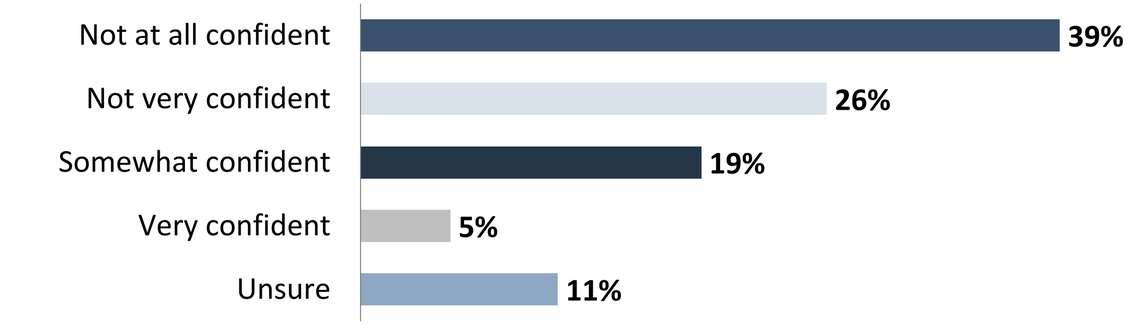
Grid Readiness Doubts Signal Barrier to All-Electric Law Acceptance

A clear majority of New Yorkers lack confidence that the state's electric grid can handle the increased demand created by the All-Electric Buildings Act. Nearly two-thirds (65%) report being "not at all confident" or "not very confident," while only 5% express strong confidence.

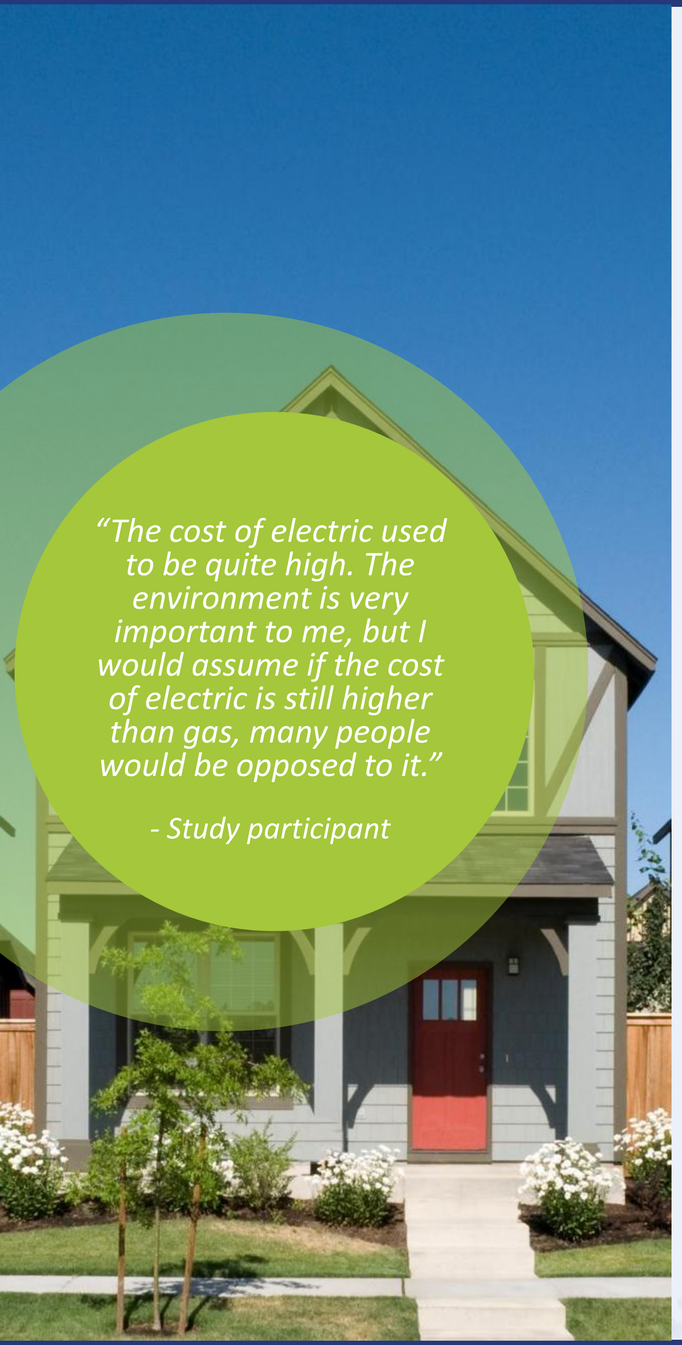
Regionally, Western New York shows the least faith in grid readiness with 40% saying they are not at all confident and a regional mean score of just 1.8 out of 5. Confidence is somewhat higher in Downstate areas where residents' mean score was 2.3, though low-confidence remains widespread.

These findings suggest concerns about infrastructure capacity as related to the All-Electric Buildings Act.

How confident are you that the state's electric grid can handle the increased demand this will create?



Region	Capital / North / Mohawk / Mid-Hudson	Central NY / Southern Tier	Downstate (NYC + Long Island)	Western NY
Very confident	7%	14%	16%	5%
Somewhat confident	26%	18%	22%	17%
Not very confident	24%	27%	25%	26%
Not at all confident	36%	30%	25%	40%
Unsure	8%	11%	12%	13%
MEAN	**2.0**	**2.2**	**2.3**	**1.8**



Statewide Perceptions of Grid Confidence

Across New York State, resident confidence in the electrical grid's ability to support a transition to all-electric homes leans towards not having confidence in the current infrastructure. There is some cautious optimism from some and deep skepticism from others. Key themes of concern include **performance during extreme weather**, **aging infrastructure**, **policy direction**, and **the pace of clean energy investment**.

➢ **Confidence is due to Planning and Green Economy Growth**

Some residents expressed faith in the state's intent and ability to adapt the grid over time. In **Western NY**, one resident observed that, *"Grid has been reinforced,"* while another pointed to future-readiness, *"New homes will be added gradually… the grid will grow with usage."* Others cited environmental progress, *"Green energy is growing—wind and solar farms are going up."* From **Central NY**, a participant acknowledged current fragility but expressed trust in governance, *"I trust NYS and our lawmakers to plan appropriately."* There was also recognition of the environmental imperative, *"Without legislative efforts to produce more green energy, the aging grid won't keep up."* In the **Capital Region**, a resident offered reassurance by noting, *"We don't have blackouts now,"* and another reasoned, *"I feel like they would not pass this law without a strong supporting grid."*

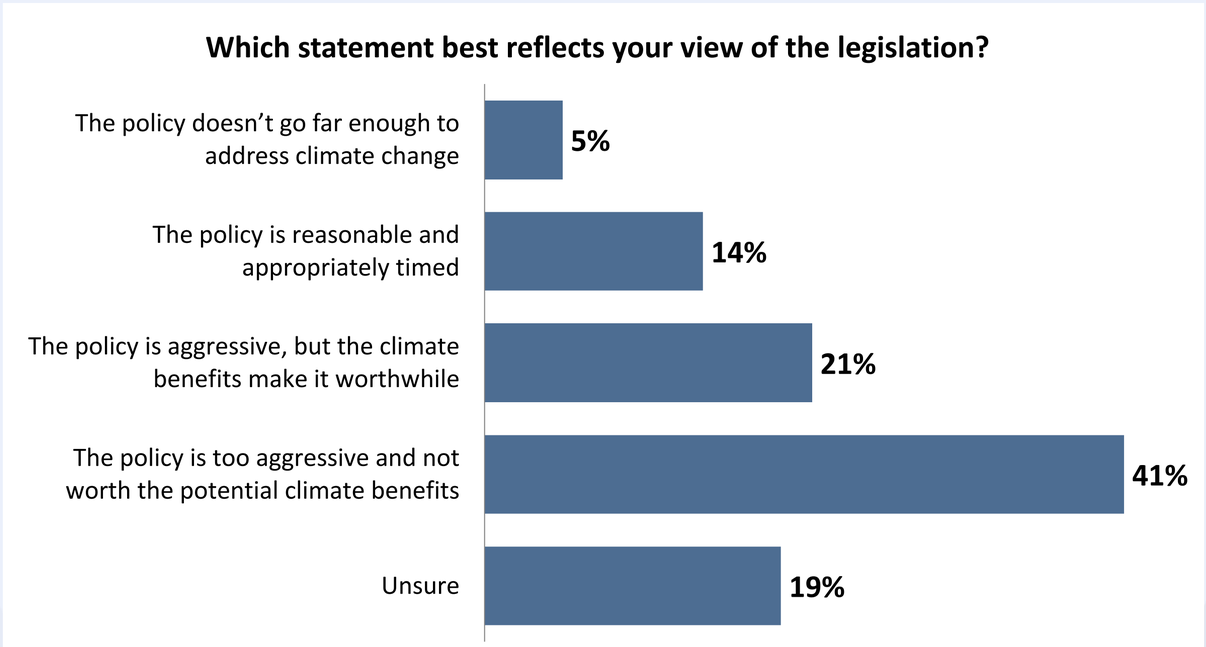
➢ **Concerns Regarding in Reliability, Underinvestment, and Climate Stress**

Yet across all regions, there is persistent worry about the grid's ability to perform under pressure, particularly during extreme weather events. **Capital Region** residents shared doubts, *"We're asked to conserve during high heat… the grid can't keep up,"* and *"Brownouts are more frequent. No new base-load power plants are being built."* In **Central NY**, a resident voiced concern that *"the grid still has old technologies… we're threatened with brownouts."* Another feared rising costs, *"They are not prepared, and it will eventually cost taxpayers more money."* **Downstate participants** offered blunt assessments: *"The grid is barely holding on now—it needs updating,"* and, in reference to NYC, *"Power goes out anytime there's a storm in the Bronx."*

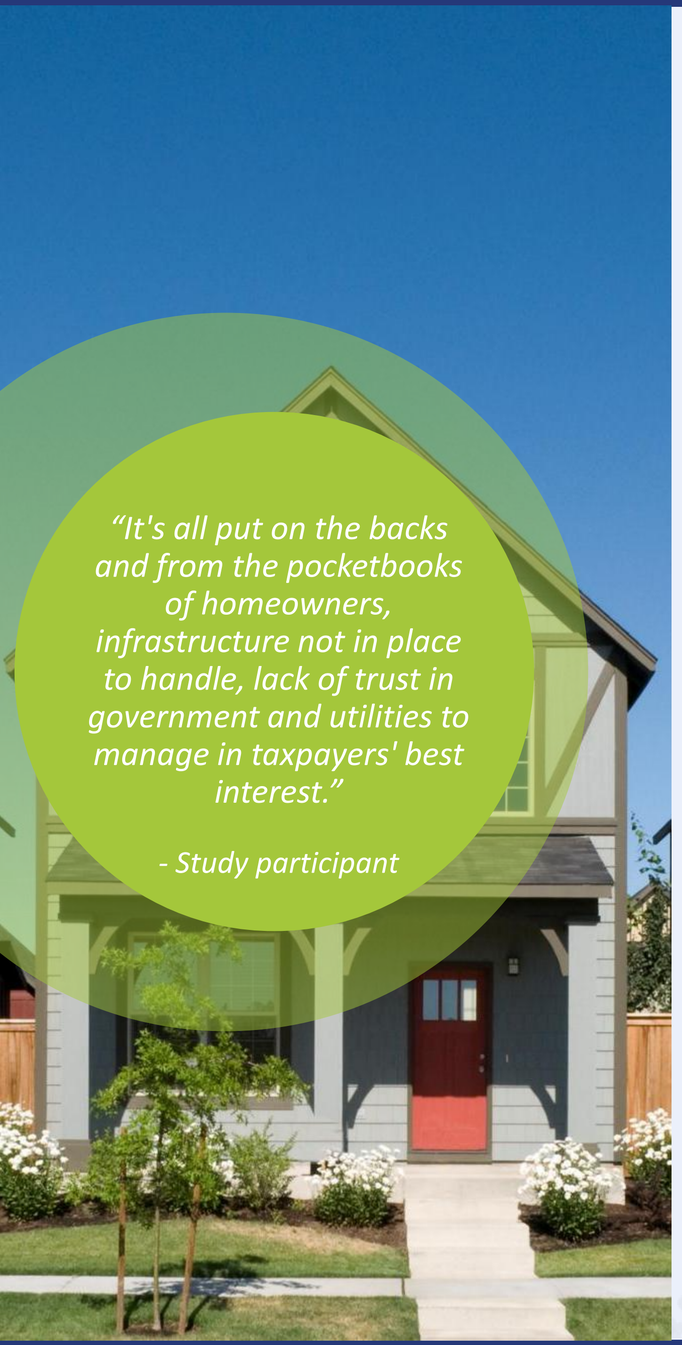
A sense of inequity was implied as well: *"NYS hasn't invested enough yet in green energy."* From **Western NY**, one participant reported real-time reliability issues: *"My power flickers monthly. Now in a heat wave, I expect outages."* Another criticized long-term neglect: *"This state hemorrhages money. We've only done emergency maintenance."*

Many View All-Electric Act as Too Aggressive, Though Regional Opinions Vary

Many respondents (41% statewide) believe the All-Electric Building Act is too aggressive and not worth the potential climate benefits. This sentiment is strongest in Western New York (46%) and Central NY / Southern Tier (43%) with slightly lower concern in Downstate (30%). Only 14% of New Yorkers feel the policy is appropriately timed and reasonable, and 5% believe it doesn't go far enough. Even among those who support action, only 21% say the policy is aggressive but justified due to climate needs. "Unsure" remains a notable proportion of responses with nearly 1 in 5 respondents statewide unsure of their stance (regionally the highest percentage is at 22% in Downstate).



Region	Capital / North / Mohawk / Mid-Hudson	Central NY / Southern Tier	Downstate (NYC + Long Island)	Western NY
The policy is too aggressive and not worth the potential climate benefits	41%	43%	30%	46%
The policy is aggressive, but the climate benefits make it worthwhile	23%	25%	20%	16%
The policy is reasonable and appropriately timed	13%	12%	25%	16%
The policy doesn't go far enough to address climate change	7%	5%	4%	5%
Unsure	16%	16%	22%	17%



Policy Open Ends – Too Aggressive

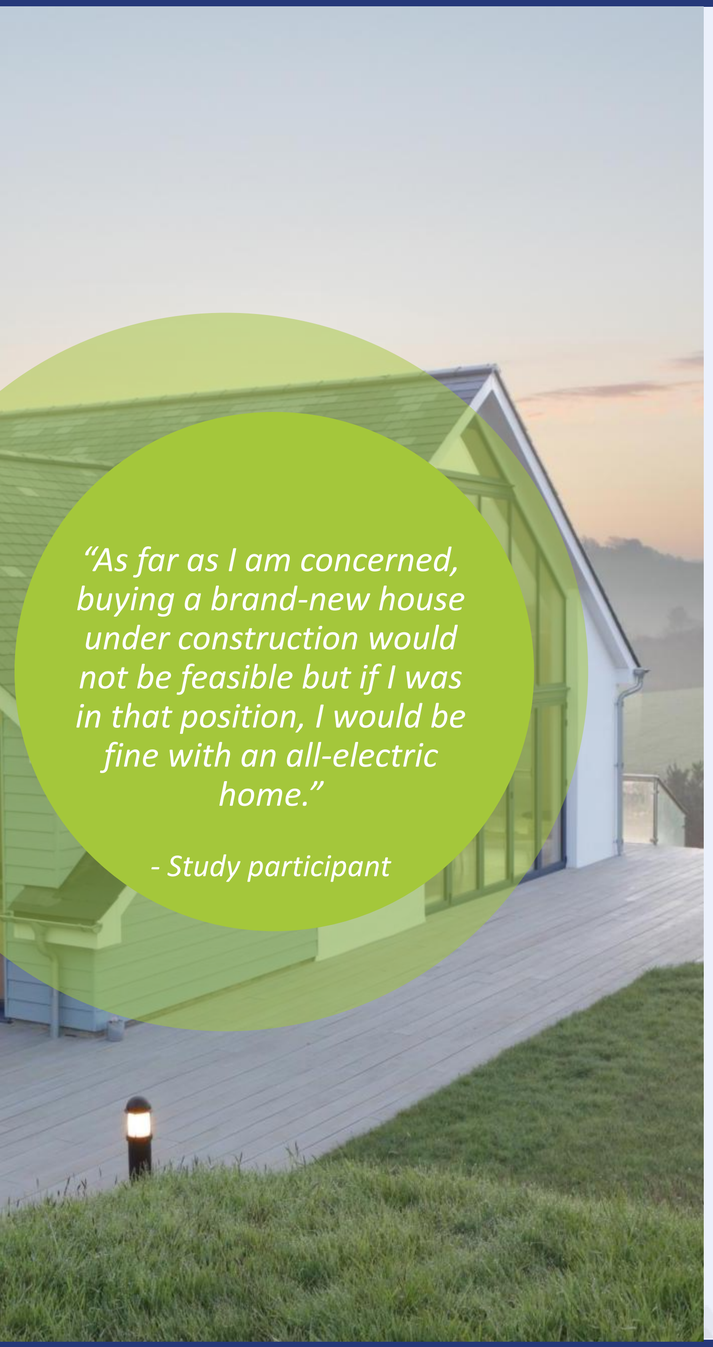
Across all regions, participants voiced frustration over the mandate and expressed concern over perceived government overreach and economic burdens placed on consumers due to the policy.

- **Cost & Infrastructure**: Many argued the policy is unaffordable and poorly timed. From the Capital Region: *"Too much for too little; taxpayers will pay the price."* Similarly, in Central NY: *"Will cost a fortune; infrastructure doesn't support it."*
- **Technology & Reliability**: Concerns emerged that the grid and home systems are unprepared. In Western NY: *"We're not ready; brownouts/blackouts coming."* From Downstate: *"Electric appliances are more expensive and unreliable."*
- **Freedom of Choice**: Participants in multiple regions pushed back on mandates. Central NY residents shared: *"Unfair to homeowners; let people choose their energy,"* while in Western NY: *"Too many mandates; being forced to comply."*
- **Policy & Action**: Distrust in government capacity and fairness was widespread. From the Capital: *"Policy is out of touch,"* and in Western NY: *"Should pilot in regions first."*
- **Environmental Skepticism**: Some questioned the policy's premise. The Capital Region included extreme skepticism: *"Climate change is exaggerated or manipulated."* Central NY echoed doubts: *"Won't move the needle; bigger polluters are the issue."*

Policy Open Ends – Not Aggressive Enough

In contrast, a subset of participants felt the state's electrification strategy doesn't go far enough to address climate and energy system vulnerabilities.

- **Cost Solutions**: Western NY participants pushed for more systemic reform: *"We need to lower electricity costs over time."* Central NY added: *"Need investments in solar, wind, and geothermal to control cost."*
- **Grid Readiness**: Several emphasized the need for proactive upgrades. In Western NY: *"Require solar + battery backup to support reliability."* Central NY warned: *"No survival plan for outages during extreme heat/cold."*
- **Policy Boldness**: Others believe the law is merely a start. Western NY emphasized: *"The law is a start, but we need bolder and faster action."* Central NY cautioned: *"Laws aren't future-proof; politics can undo progress."*
- **Climate Urgency**: Some called for dramatic, immediate action. From the Capital Region: *"Climate change is real and urgent."* In Downstate: *"Climate damage is already done—it's likely too late."*

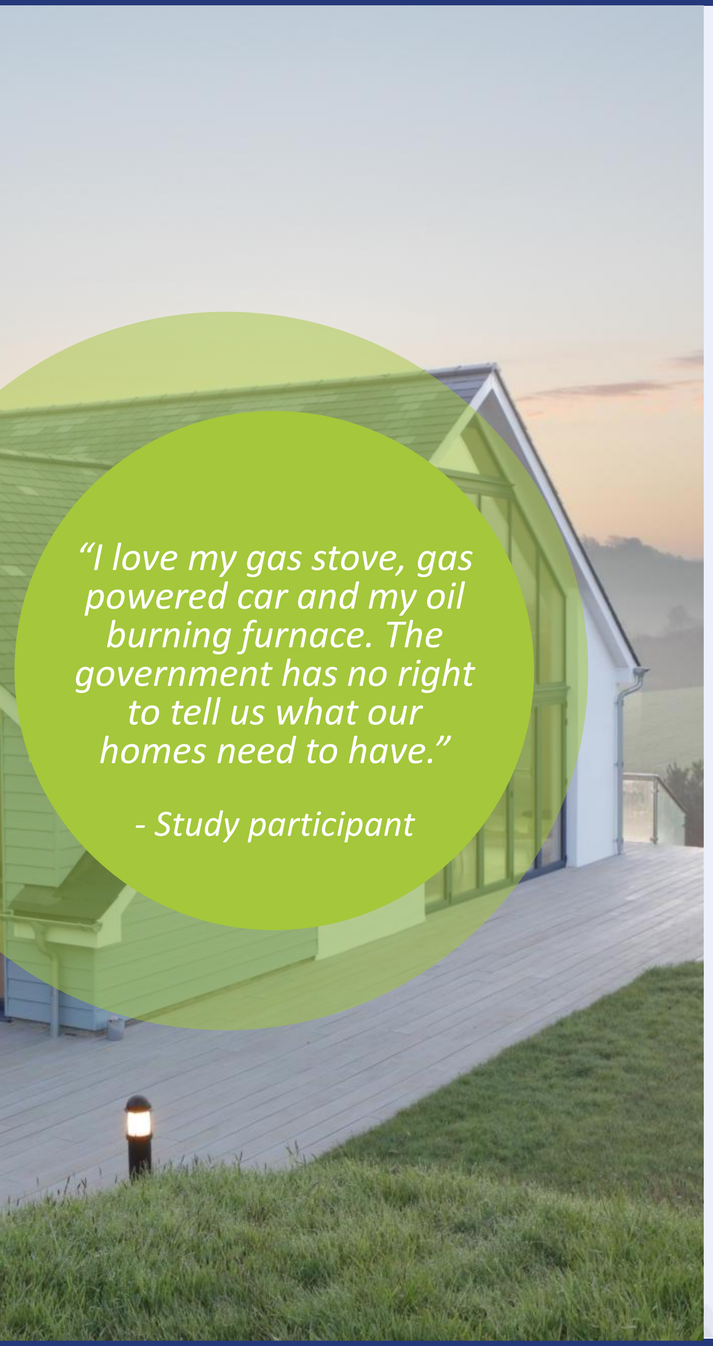


One-Fifth of New Yorkers Expect All-Electric Compliance to Add Over $20,000 to Home Construction Costs

When asked about the anticipated additional cost of constructing an all-electric new home, many respondents (32%) indicated they were unsure. Among those with an opinion, most expected meaningful added costs: 21% predicted an increase between $10,001–$20,000 and 18% believed the added cost would exceed $20,000. Only a small minority believed the law would result in no added cost (4%) or less than $5,000 (5%).

These perceptions were generally consistent across regions with more than half of respondents in each region estimating at least $10,000 in added costs. 26%–30% across all regions were unsure reinforcing uncertainty about the financial implications of the policy.

Region	Capital / North / Mohawk / Mid-Hudson	Central NY / Southern Tier	Downstate (NYC + Long Island)	Western NY	NYS
No added costs	6%	2%	5%	4%	3%
Less than $5,000	8%	4%	11%	6%	5%
$5,000 to $10,000	16%	19%	21%	19%	18%
$10,001 to $20,000	20%	18%	13%	21%	21%
More than $20,000	28%	26%	20%	24%	21%
Unsure	21%	31%	30%	26%	32%



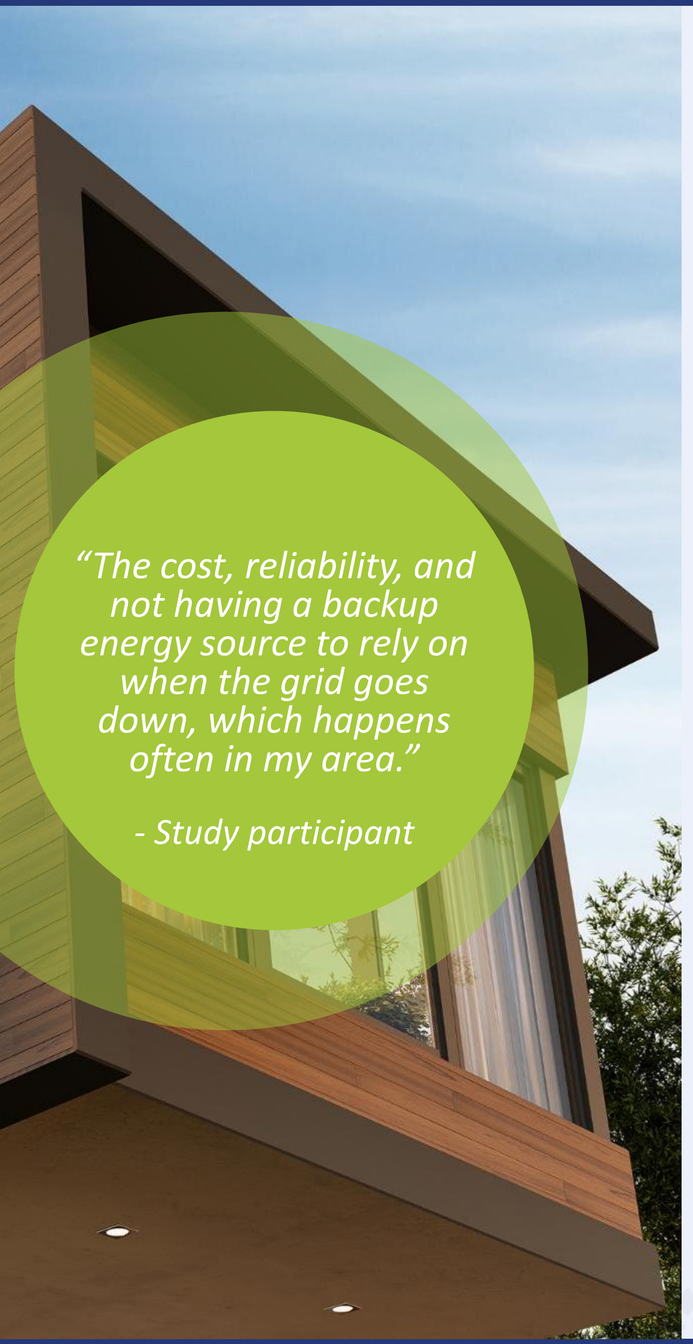
Nearly Half of Respondents Are Not Willing to Pay Additional Costs or Would Not Build a New Home Because of the All-Electric Mandate

New Yorkers express a wide range of views regarding their willingness to incur additional costs to comply with building electrification requirements with noted regional differences. Many respondents statewide, nearly 3 in 10, say they are not willing to pay anything additional with opposition highest in Western New York (36%) and Central New York (33%). Even in more urbanized Downstate areas, resistance remains strong (27%) signaling broad concerns around affordability.

Support for modest additional costs (under $5,000 or $10,000) is relatively stable across regions with about one-quarter of respondents statewide falling into these categories. However, willingness to pay higher costs ($10,000 or more) drops sharply with only a small fraction in any region indicating support. Capital / North is the only region where more than 10% are willing to pay over $10,000.

In addition to cost sensitivity, nearly one in five across the state say they would opt not to build a new home at all due to these requirements. This highlights the potential for the policy to deter new home construction, particularly in regions already experiencing economic strain.

Region	Capital / North / Mohawk / Mid-Hudson	Central NY / Southern Tier	Downstate (NYC + Long Island)	Western NY	NYS
I would not be willing to pay any additional cost.	27%	33%	27%	36%	29%
Up to $5,000	14%	12%	15%	8%	12%
$5,001 to $10,000	15%	10%	15%	9%	12%
$10,001 to $20,000	6%	10%	12%	7%	7%
More than $20,000	4%	1%	6%	6%	2%
I would decide not to build a new home because of this requirement.	18%	15%	12%	18%	19%
Unsure	17%	19%	14%	16%	18%



"The cost, reliability, and not having a backup energy source to rely on when the grid goes down, which happens often in my area."

- Study participant

Across NYS, there is hesitancy to accept higher monthly utility bills due to electrification mandates

Across New York State, there is significant hesitancy to accept higher monthly utility costs for an all-electric home. One-third of respondents statewide say they would not be willing to pay any additional amount, which was most prominent in Central New York (39%) and Western New York (34%). Even in Downstate regions, where policy alignment is often higher, more than a quarter (27%) resist any added monthly expense.

Among those who are open to higher utility bills, the most commonly acceptable increase is modest (between 1% and 5%) with roughly 1 in 8 residents statewide selecting this range. Willingness drops noticeably beyond that threshold. Fewer than 1 in 10 statewide are willing to pay 5%-10% more, and just 8% would tolerate increases between 15%-20%. Only a small minority (11%) statewide express readiness to absorb a 20% or greater increase. A substantial portion of residents remain unsure – nearly 1 in 5 statewide.

Region	Capital / North / Mohawk / Mid-Hudson	Central NY / Southern Tier	Downstate (NYC + Long Island)	Western NY	NYS
I would not be willing to pay any additional cost.	30%	39%	27%	34%	33%
1%-5%	11%	11%	11%	12%	12%
5%-10%	10%	9%	14%	11%	10%
10%-15%	13%	12%	14%	7%	10%
15%-20%	6%	6%	8%	6%	8%
20% or more	11%	8%	7%	12%	11%
Unsure	21%	16%	19%	18%	18%

Participants' Perception of All-Electric Largely Unchanged After Survey

After completing the survey, only 17% of respondents statewide reported that their opinion of New York State's fossil fuel reduction initiative had changed. This trend was consistent across most regions with Downstate (NYC + Long Island) showing the highest rate of reported opinion change at 36%, while Western NY showed the lowest at 18%. The majority of participants across all regions indicated that their views remained unchanged.

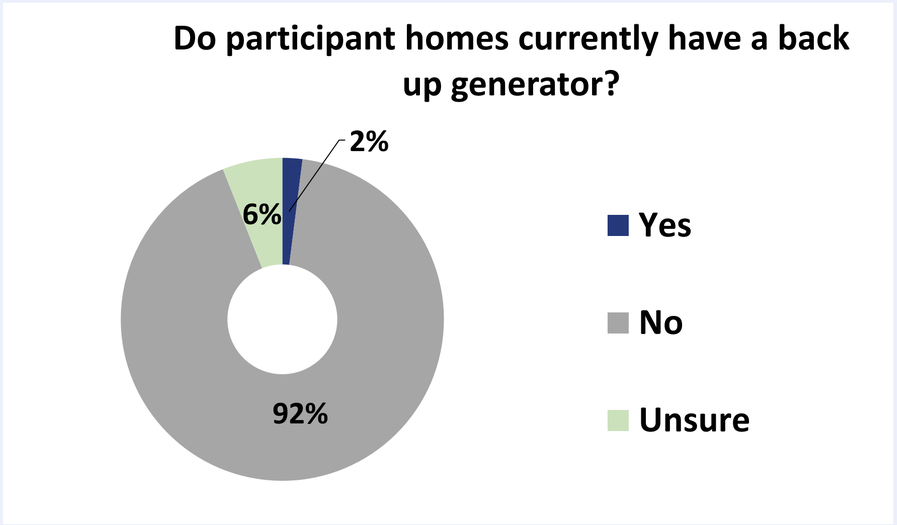
Among participants who reported a change in opinion after completing the survey, support levels for the NYS fossil fuel reduction initiative varied by region. On a 1-to-10 scale (with 10 indicating strong support), the statewide average was **5.7**. Downstate (NYC + Long Island) and the Capital / North / Mohawk / Mid-Hudson regions reported the highest mean support levels at **6.8** and **6.6** respectively. Central NY / Southern Tier had the lowest average at **3.9** suggesting more modest shifts in favor of the policy. Most responses statewide clustered around mid-to-high values (5–8) with relatively fewer participants selecting the extreme ends of the scale. These results suggest that while opinion change was limited overall, those who did shift tended to lean moderately to strongly in favor of the initiative.

Region	Yes	No
▪ Capital / North / Mohawk / Mid-Hudson	21%	79%
▪ Central NY / Southern Tier	28%	72%
▪ Downstate (NYC + Long Island)	36%	64%
▪ Western NY	18%	82%
▪ NY State	17%	83%

	Capital / North / Mohawk / Mid-Hudson	Central NY / Southern Tier	Downstate (NYC + Long Island)	Western NY	NY State
1	5%	45%	10%	13%	16%
2	8%	6%	3%	2%	7%
3	5%	1%	-	11%	2%
4	4%	5%	1%	5%	9%
5	12%	13%	14%	4%	12%
6	23%	1%	9%	18%	6%
7	11%	8%	16%	10%	13%
8	10%	12%	22%	24%	18%
9	1%	5%	9%	3%	7%
10	21%	5%	16%	10%	11%
MEAN	6.6	3.9	6.8	5.9	5.7

Few NYS residents have a back up generator

- Backup generator ownership among participants is limited with **only 2%** of New York State respondents reporting that their household currently has one.
- Ownership is highest in the Capital / North / Mohawk / Mid-Hudson (11%) and Western NY (10%) regions, while it is lowest in Central NY/Southern Tier at less than 1%.
- Downstate (NYC + Long Island) falls in the middle with 7% reporting generator ownership.
- These figures provide important context for grid reliability concerns as most households may lack alternative power options in the event of outages.

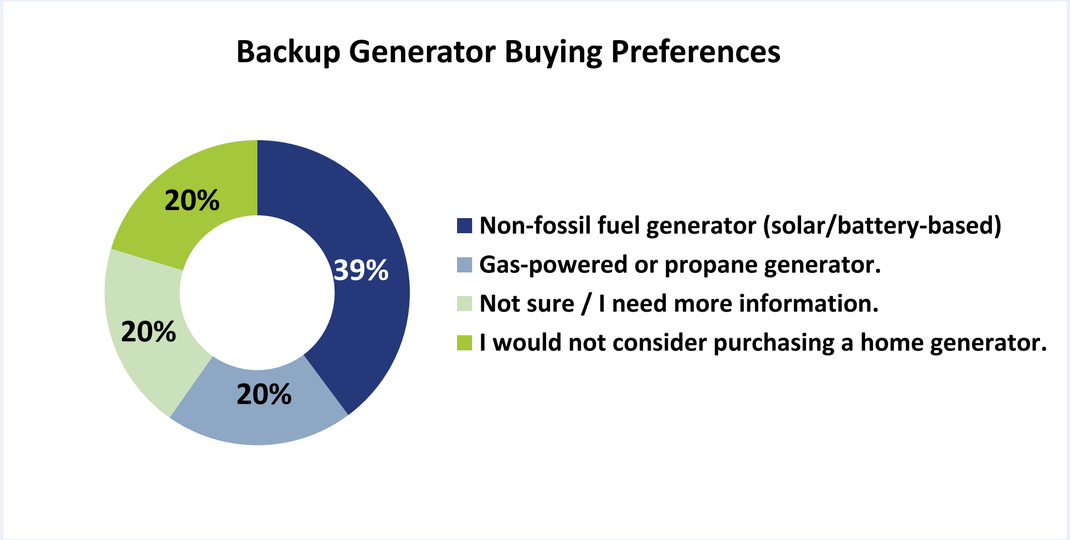


Region	Yes	No	Unsure
▪ Capital / North / Mohawk / Mid-Hudson	11%	85%	4%
▪ Central NY / Southern Tier	1%	94%	5%
▪ Downstate (NYC + Long Island)	7%	82%	11%
▪ Western NY	10%	86%	4%

Participant Preferences on Backup Generators

When asked about preferences for a backup generator, respondents showed a strong inclination toward non-fossil fuel options such as solar or battery-based systems. Statewide, 39% expressed preference for a non-fossil generator – the most selected option overall. Gas or propane-powered generators were chosen by 20% of participants, while an equal share (20%) indicated they would not consider a generator at all. Another 20% were uncertain and requested more information.

Regionally, Central NY/Southern Tier reported the highest preference for non-fossil generators (42%), followed by Capital/North/Mohawk/Mid-Hudson and Downstate at 33%. Western NY showed a more even split, with 26% preferring non-fossil and 35% preferring gas-powered units. Downstate had the highest level of uncertainty, with 39% indicating they needed more information.



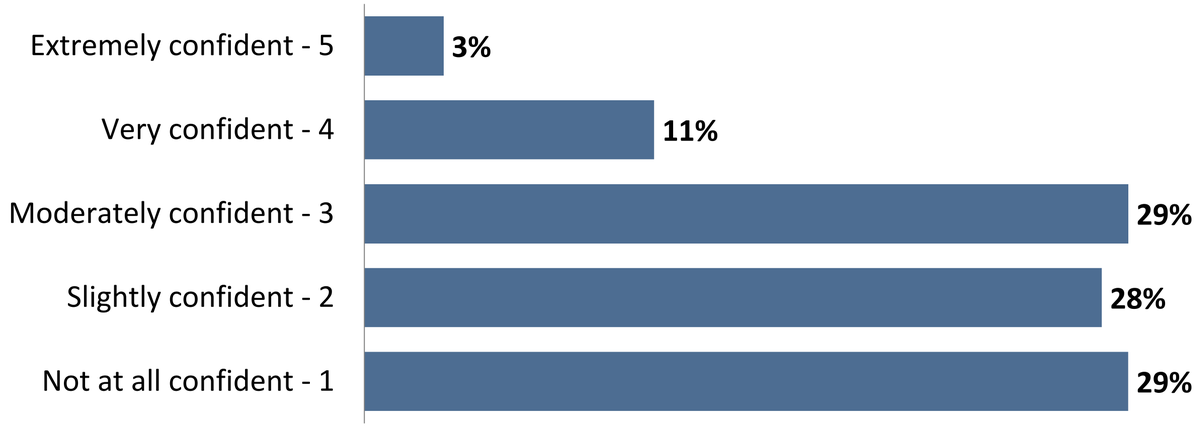
Region	Non-Fossil	Gas	Not sure	Would not consider
▪ Capital / North / Mohawk / Mid-Hudson	33	31	30	6
▪ Central NY / Southern Tier	42	24	26	7
▪ Downstate (NYC + Long Island)	33	21	39	7
▪ Western NY	26	35	33	6

Confidence in All-Electric, Non-Fossil Backup Energy Sources Remains Modest Across Regions

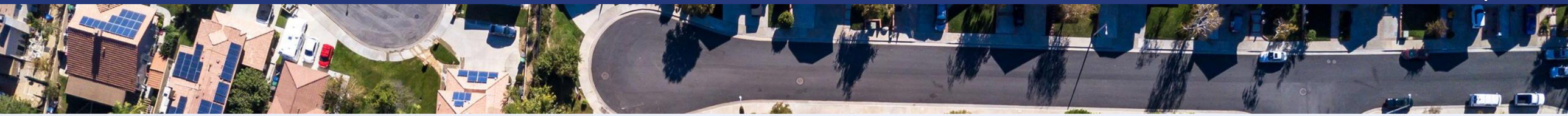
When asked about their confidence in the reliability of all-electric, non-fossil fuel backup energy systems, most participants expressed limited assurance. Only 3% reported being *extremely confident* while 11% were *very confident*. The majority fell into middle or lower tiers: 29% were *moderately confident*, 28% *slightly confident*, and another 29% *not at all confident*.

Confidence levels varied somewhat by region. Downstate participants reported the highest average confidence (mean = 2.7), followed by Capital / North (2.5), Western NY (2.3), and Central NY /Southern Tier (2.2). These moderate-to-low averages underscore prevailing uncertainty or skepticism toward the reliability of non-fossil backup solutions, which may affect future adoption or support.

How confident are participants in the reliability of an all-electric and non-fossil fuel backup energy source?

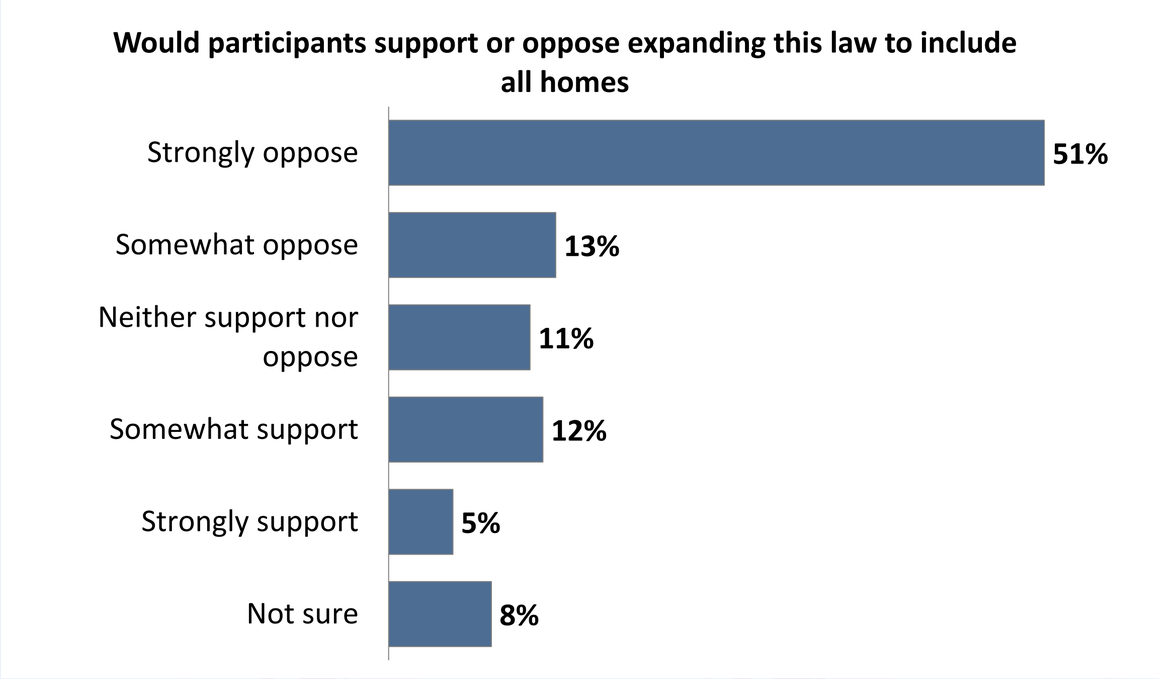


Region	Extremely	4	3	2	Not at all	Mean
▪ Capital / North / Mohawk / Mid-Hudson	25%	25%	34%	9%	7%	2.5
▪ Central NY / Southern Tier	33%	27%	29%	9%	2%	2.2
▪ Downstate (NYC + Long Island)	19%	25%	33%	16%	7%	2.7
▪ Western NY	33%	23%	31%	7%	6%	2.3

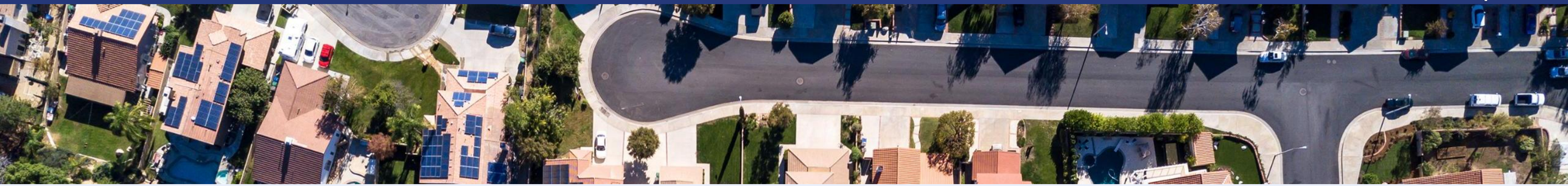


Majority of Participants Oppose Expanding the All-Electric Law to All Homes

When asked whether they would support expanding the all-electric buildings law to include all homes, a majority of participants expressed opposition. Over half (51%) said they *strongly oppose* such an expansion while an additional 13% *somewhat oppose* it. Only 17% of participants indicated support (*12% somewhat*, *5% strongly*) and 11% were neutral. Opposition was consistently high across all regions with the mean support rating lowest in Central NY / Southern Tier (0.3 on a 5-point scale) and highest in Downstate (1.1). Even in areas with slightly higher average support, such as the Capital / North region (1.0), strong opposition still dominated. **These results suggest substantial resistance to expanding the law statewide particularly among respondents in upstate and western regions.**



Region	1	2	3	4	5	Unsure	MEAN
▪ Capital / North / Mohawk / Mid-Hudson	7%	14%	16%	10%	43%	10%	1.0
▪ Central NY / Southern Tier	18%	9%	11%	13%	41%	8%	0.3
▪ Downstate (NYC + Long Island)	11%	19%	21%	13%	27%	9%	1.1
▪ Western NY	6%	13%	16%	10%	47%	9%	0.8



Open Ended Responses Clarifying Expansion of All-Electric Act

New Yorkers express a wide range of views when asked about expanding the electrification mandate. While some show strong support, others remain neutral or opposed. The key drivers behind these views include affordability, climate impact, personal choice, and readiness of infrastructure.

- **Supporters (Ratings 4–5)**

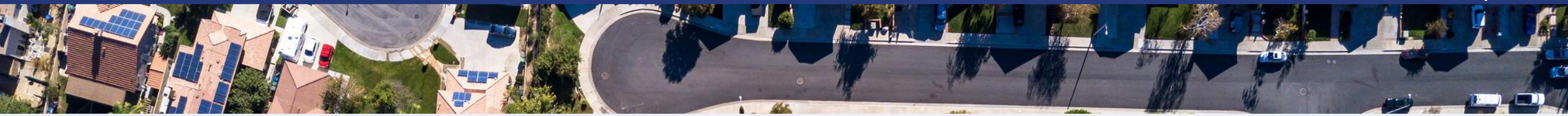
Supporters are motivated by environmental benefits, public health, and long-term cost savings, yet many attach important caveats. In Western NY, support is conditional: *"If the person can afford the changes, then it's better for the environment."* Central NY / Southern Tier residents highlight the role of timing and incentives: *"I would support it ONLY if it was at the time of appliance replacement." From the Capital / North / Mohawk / Mid-Hudson region, climate urgency drives support, tempered by frustration with politics: "It needs to be done but in unison. Forget politics and big business."* Downstate (NYC + Long Island) participants focus on public health and clean energy benefits: *"Promotes cleaner energy, reduces emissions, and ensures healthier living environments."*

- **Neutral (Rating 3)**

Neutral respondents often acknowledge both pros and cons, but hesitate due to gaps in information, policy clarity, or concerns about affordability. A Western NY participant noted: *"It's a noble idea. But it could cause a financial burden on lower income households."* In Central NY, uncertainty persists: *"I need to study this law in further detail."* The Capital Region showed hesitation over feasibility: *"Not everyone can afford it."* A Downstate respondent summed up the tension: *"I see both pros and cons… retrofitting all homes would be expensive and disruptive."*

- **No Support (Ratings 1–2)**

Opponents largely reject the policy due to fears over affordability, grid reliability, and loss of autonomy. In Western NY, one participant stated bluntly: *"Are you joking?... Spend the money on making the state safer."* Central NY framed their concern around governance: *"It should be left to the people of NYS, NOT the government!"* A Capital Region respondent pushed back on mandates: *"This is America. Let the public make their own choices."* In Downstate, economic fears dominate: *"Expanding this law would be very detrimental… it would increase costs."*

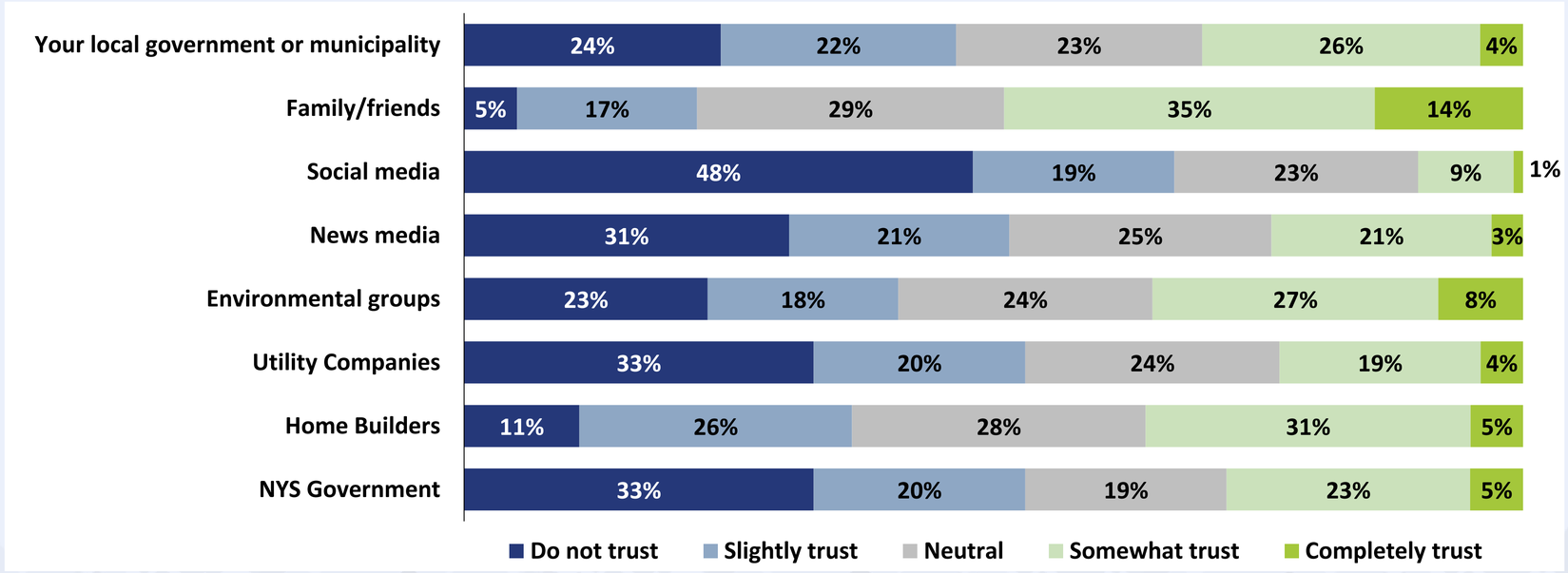


Highest Trust in Energy-Related Information: Family and Friends

When asked which sources they trust most for information about energy issues, participants expressed the highest confidence in **family and friends** with nearly half indicating they *somewhat* or *completely* trust them (35% and 14% respectively). This source also had the highest mean trust rating at 3.4 on a 5-point scale.

By contrast, **social media was the least trusted source** with 48% of respondents indicating they *do not trust* it at all, resulting in the lowest average score of 2.0. Other institutional sources like utility companies, the NYS government, and the news media also had relatively low trust, each with over 30% of respondents expressing no trust. Trust in environmental groups, home builders, and local governments was more mixed generally landing middle-of-the-road in mean scores (2.7 to 2.9) reflecting a polarized yet more balanced distribution of sentiment.

These results suggest that when it comes to disseminating energy-related information, personal networks may hold more influence than formal institutions, and confidence in public and digital sources remains limited. The Appendix breaks down each region's findings further.



Source	Mean Score
▪ New York State government	2.5
▪ Home builders	2.9
▪ Utility companies	2.4
▪ Environmental groups	2.8
▪ News media	2.4
▪ Social media	2.0
▪ Family/friends	3.4
▪ Your local government or municipality	2.7

Insights & Considerations

KEY SURVEY INSIGHTS

RMS does not take a position for or against the All-Electric Buildings Act. Our role in this study was to analyze the data objectively and present the findings with accuracy and integrity. The insights outlined in this report reflect the perspectives and experiences of respondents and are intended to inform ongoing dialogue and policy discussions. Based on the data, the following themes emerged:

- Support for the all-electric legislation remains low across New York State. Public awareness is also limited while both awareness and attitudes vary significantly by region. Urban residents, particularly renters and those in multifamily dwellings, often express indifference toward the policy citing limited control over appliances and housing systems.
- Across all regions, residents voiced strong concerns about implementation – especially regarding winter reliability and the need for backup heating systems. Many view electric heat pumps as insufficient for cold climates and stress the continued need for fossil fuel alternatives during extreme weather conditions.
- Cost remains a prominent barrier. Respondents frequently expressed apprehension about affording appliance upgrades, particularly if restrictions extend beyond new construction to existing homes. For many, these concerns raise fears of financial strain or forced changes without adequate support.
- While some participants supported the legislation, citing environmental protection and the urgency of addressing climate change, many others took a more nuanced stance. These individuals generally supported climate action but viewed the current policy as ineffective, overly rigid, or symbolic rather than impactful. Several emphasized that without broader systemic change, the law's overall effect on emissions would be limited.
- Additionally, the potential for increased home construction costs surfaced repeatedly with some respondents indicating the law would influence their willingness to build or buy a new home. Open-ended responses suggest hesitancy toward future residential development under these conditions.

While many New Yorkers share a desire to address climate change, there is clear need for greater public engagement, infrastructure readiness, and economic support to ensure policies like the All-Electric Buildings Act are both effective and equitable. As the state moves forward, thoughtful communication, regional sensitivity, and stakeholder collaboration will be essential in building trust and achieving shared environmental goals. This report offers a foundation for continued dialogue among policymakers, industry leaders, and the public.

Facilitating Productive Statewide Dialogue on Electrification Policy

The data indicate a clear need for broader, more inclusive dialogue across New York State regarding the all-electric buildings legislation. To support productive engagement and align climate policy goals with practical implementation concerns, RMS recommends the following:

- **Leverage Trusted Local Voices**
  Survey findings show that trust is strongest in local sources such as family, friends, municipal governments, and homebuilders. Public education and outreach efforts will benefit from partnerships with these trusted messengers to improve credibility and increase receptivity to policy information.

- **Address Regional Infrastructure Concerns**
  Grid reliability and energy infrastructure emerged as recurring concerns, particularly in upstate and rural communities. Policymakers and utilities can build trust by openly sharing infrastructure improvement plans and demonstrating visible progress in regional grid readiness.

- **Clarify the Difference Between Policy and Public Perception**
  Many comments reflect intense and often conflicting views. Some respondents expressed frustration with perceived government overreach, while others felt the policy did not go far enough. These polarized responses highlight that the public discourse often centers more on emotion and politics than on the specifics of the legislation. Acknowledging this divide is critical for fostering more constructive, policy-focused conversations.

- **Maintain a Neutral, Transparent Communication Approach**
  Given the complexity and varying levels of awareness and support, ongoing stakeholder engagement should remain fact-based, neutral, and transparent. A balanced tone will enhance credibility and help create space for dialogue that reflects the diverse values and realities of residents across the state.

APPENDIX

New York State Counties by Region in Report

Capital / North / Mohawk / Mid-Hudson	Central NY / Southern Tier	Western NY	Downstate (NYC + Long Island)
Albany County	Broome County	Allegany County	Bronx County
Clinton County	Cayuga County	Cattaraugus County	Kings County (Brooklyn)
Columbia County	Chemung County	Chautauqua County	Nassau County
Dutchess County	Chenango County	Erie County	New York County (Manhattan)
Essex County	Cortland County	Genesee County	Queens County
Franklin County	Delaware County	Livingston County	Richmond County (Staten Island)
Fulton County	Hamilton County	Monroe County	Suffolk County
Greene County	Onondaga County	Niagara County	Westchester County
Herkimer County	Oswego County	Ontario County	
Jefferson County	Schuyler County	Orleans County	
Lewis County	Steuben County	Seneca County	
Madison County	Tioga County	Wayne County	
Montgomery County	Tompkins County	Wyoming County	
Oneida County		Yates County	
Orange County			
Otsego County			
Putnam County			
Rensselaer County			
Rockland County			
St. Lawrence County			
Saratoga County			
Schenectady County			
Schoharie County			
Sullivan County			
Ulster County			
Warren County			
Washington County			

Regional Preferences Appliance Type Key Themes from Open Ended Responses - Furnaces

Region	Electric Preference Themes	Gas Preference Themes	No Preference Themes
Capital / North / Mohawk / Mid-Hudson	**Safety, efficiency, lack of gas infrastructure** • "I do not feel safe with gas." – *Dutchess County* • "No natural gas pipelines run through my neighborhood." – *Orange County* • "It is important to switch from gas and oil to electric to help save our planet's environment." – *Oneida County*	**Cost, reliability, existing systems** • "Electric costs an arm and a leg!" – *Albany County* • "Been without electricity before. Gas doesn't care." – *Jefferson County* • "Prefer gas over electric." – *Madison County*	**Indifference, oil-based heating, cost sensitivity** • "I only have a fuel oil option where I live." – *Oneida County* • "Both are ridiculously expensive lately." – *Sullivan County* • "Whichever is cheaper." – *Albany County*
Central NY / Southern Tier	**Environmentalism, safety, preference** • "We already have a solar system on our roof and hope to expand it." – *Cayuga County* • "I want a gas-free home." – *Onondaga County* • "Gas is being discontinued." – *Onondaga County*	**Cost, existing infrastructure, outage backup** • "Gas still works when power goes out." – *Onondaga County* • "We'd have to rewire our house." – *Onondaga County* • "More even heat." – *Onondaga County*	**Lack of knowledge, landlord decision, geothermal** • "Not enough info." – *Onondaga County* • "We love the geothermal, and it's much cheaper than our old oil furnace." – *Broome County* • "Replacement up to landlord." – *Onondaga County*
Downstate (NYC + Long Island)	**Safety, modernization, sustainability** • "I'd like to one day own a home with solar panels and a battery." – *Westchester County* • "It's safer and more eco-friendly." – *Manhattan* • "Electric is easier to use." – *Brooklyn*	**Familiarity, existing systems, perceived value** • "It was built that way for gas." – *Brooklyn* • "Natural gas is more efficient." – *Westchester County* • "Gas is cheaper than electric." – *Westchester County*	**Renters, building control, indifference** • "I rent – not my decision." – *Bronx County* • "I have no control over this, it serves the entire building." – *Manhattan* • "It doesn't matter." – *Suffolk County*
Western NY	**Solar/green energy, heat pumps, safety** • "Fairport Electric is most cost effective." – *Monroe County* • "Get off fossil fuels. Less risk of an explosion." – *Monroe County* • "Electric is more efficient, and we have solar panels." – *Wayne County*	**Cost, reliability in outages, infrastructure** • "Gas is cheaper and more reliable than electric." – *Erie County* • "We NEED non-electric appliances when power goes out." – *Wayne County* • "Natural gas prices are much lower than electric." – *Monroe County*	**Cost-based decisions, HOA control, mixed views** • "Would go for most efficient and cost efficient." – *Monroe County* • "It would be up to the HOA to decide." – *Monroe County* • "They both have advantages and disadvantages." – *Niagara County*

Regional Preferences Appliance Type Key Themes from Open Ended Responses – Water Heater

Region	Electric	Gas	No preference
Capital / North / Mohawk / Mid-Hudson	**Safety, sustainability, modernization** • “i do not feel safe with gas” • “faster hot water. cheaper to run” • “Existing”	**Cost efficiency, reliability, infrastructure** • “Efficient - heat quickly/lasts longer than unit running more to maintain heat level/ lower waste footprint Cost - cheaper to operate” • “Cheaper, and available when the power goes out.” • “Been without electricity before. Gas doesn't care”	**Indifference, situational factors, or landlord control** • “I prefer fuel oil.” • “Not knowledgeable about gas vs. electric regarding this appliance” • “I would have to research this.”
Central NY / Southern Tier	**Safety, sustainability, modernization** • “I don’t have gas hook ups” • “Cheaper” • “My home is not set up for gas”	**Cost efficiency, reliability, infrastructure** • “more efficient” • “Efficiency” • “See above”	**Indifference, situational factors, or landlord control** • “Neither Solar” • “Not applicable” • “Also choose based on efficiency”
Downstate (NYC + Long Island)	**Safety, sustainability, modernization** • “id like to one day own a home with solar pannels and a battery” • “I think this would be a better choice.” • “i can supplement using solar”	**Cost efficiency, reliability, infrastructure** • "Sane” • “Familiar with” • “Gas is cheaper than electric”	**Indifference, situational factors, or landlord control** • “Don’t know which is better” • “Apartment building” • “it doesn't matter”
Western NY	**Safety, sustainability, modernization** • “It's safer” • “i think an electric water heater would have a higher performance” • “Heat pump”	**Cost efficiency, reliability, infrastructure** • “more efficient” • “Gas is already hooked up” • “cheaper”	**Indifference, situational factors, or landlord control** • “Whichever is more reliable” • “Would go for most efficient and cost efficient” • “No”

Regional Preferences Appliance Type Key Themes from Open Ended Responses – Stove

Region	Electric	Gas	No preference
Capital / North / Mohawk / Mid-Hudson	• Theme: Safety, sustainability, modernization “i do not feel safe with gas” • “faster cooking.” • “Existing”	Theme: Cost efficiency, reliability, infrastructure • “I just like gas stoves better” • “Higher quality cooking experience & end food product Cost - cheaper to operate” • “Cheaper, and available when the power goes out.”	Theme: Indifference, situational factors, or landlord control • “do not care” • “This is a tool to cook your food” • “depends on cost”
Central NY / Southern Tier	Theme: Safety, sustainability, modernization • “electric, as much as I do not like them” • “Induction” • “To use with the solar”	Theme: Cost efficiency, reliability, infrastructure • “better cooking quality” • “See above” • “I don't like the heat control of electric stoves”	Theme: Indifference, situational factors, or landlord control • “I've worked with both” • “Choose based on style” • “No preference”
Downstate (NYC + Long Island)	Theme: Safety, sustainability, modernization • “id like to one day own a home with solar panels and a battery” • “I think this would be a better choice.” • “I can supplement using solar”	Theme: Cost efficiency, reliability, infrastructure • “The apartment is set up for gas stove” • “Cooks even” • “Same”	Theme: Indifference, situational factors, or landlord control • “I've had both & so either is fine” • “Doesn’t matter” • “Price”
Western NY	Safety, sustainability, modernization • “It’s what I’m used to” • “It’s already hooked up” • “Safer”	Theme: Cost efficiency, reliability, infrastructure • “prefer a flame over a coil” • “More efficient, Cooks far more evenly, the heat is easier to control and it takes far less energy to bring to temp, and less time to cool. Plus I can cut the heat immediately in case of emergency” • “cheaper”	Theme: Indifference, situational factors, or landlord control • “No” • “Whichever is less expensive” • “Would depend on cost”

Regional Preferences Appliance Type Key Themes from Open Ended Responses – Oven

Region	Electric	Gas	No preference
Capital / North / Mohawk / Mid-Hudson	Theme: Safety, sustainability, modernization • “Can do without” • “Already has hook up” • “i do not feel safe with gas”	Theme: Cost efficiency, reliability, infrastructure • “Higher quality cooking experience & end food product Cost - cheaper to operate” • “Cheaper, and available when the power goes out.” • “same”	Theme: Indifference, situational factors, or landlord control • “Not knowledgeable about gas vs. electric regarding this appliance” • “do not care” • “idc”
Central NY / Southern Tier	Theme: Safety, sustainability, modernization • “electric” • “To use with the solar” • “Like electric”	Theme: Cost efficiency, reliability, infrastructure • “better baking quality” • “Need to learn more about electric oven” • “See above”	Theme: Indifference, situational factors, or landlord control • “I've worked with both” • “Choose based on size” • “No preference”
Downstate (NYC + Long Island)	Theme: Safety, sustainability, modernization • “id like to one day own a home with solar pannels and a battery” • “Electric works ok” • “I think this would be a better choice.”	Theme: Cost efficiency, reliability, infrastructure • “The apartment is set up for a gas oven” • “Cooks even” • “Familiar with”	Theme: Indifference, situational factors, or landlord control • “Doesn’t matter” • “Price” • “Doesn’t matter”
Western NY	Theme: Safety, sustainability, modernization • “Comes with the stove” • “Electric anyway hooked up” • “Safer”	Theme: Cost efficiency, reliability, infrastructure • “see above” • “Easier to control overall temperature.” • “cheaper”	Theme: Indifference, situational factors, or landlord control • “Doesn’t matter” • “No” • “Whichever is less expensive”

Regional Preferences Appliance Type Key Themes from Open Ended Responses – Dryer

Region	Electric	Gas	No preference
Capital / North / Mohawk / Mid-Hudson	Theme: Safety, sustainability, modernization • “Always had electric.” • “i do not feel safe with gas” • “faster dry cloths.”	Theme: Cost efficiency, reliability, infrastructure • “Efficient - heat quickly/lasts longer than unit running more to maintain heat level/ lower waste footprint Cost - cheaper to operate” • “Can use solar” • “Already has hook up”	Theme: Indifference, situational factors, or landlord control • “Not knowledgeable about gas vs. electric regarding this appliance” • “Don’t care” • “do not care”
Central NY / Southern Tier	Theme: Safety, sustainability, modernization • “Kids - electricity costs would be insane with electric dryer” • “To use with the solar” • “Like electric”	Theme: Cost efficiency, reliability, infrastructure • “more effieient and better drying” • “See above” • “Cheaper”	Theme: Indifference, situational factors, or landlord control • “Replaced by management with electric” • “I don't want a dryer in my home” • “I would choose whichever had a larger capacity”
Downstate (NYC + Long Island)	Theme: Safety, sustainability, modernization • “id like to one day own a home with solar panels and a battery” • “Electric is good” • “I think this would be a better choice.”	Theme: Cost efficiency, reliability, infrastructure • “Familiar with” • “Cost effective” • “test”	Theme: Indifference, situational factors, or landlord control • “Depends on cost” • “Apartment building” • “Doesn’t matter”
Western NY	Theme: Safety, sustainability, modernization • “Electric already hooked up” • “More efficient and smaller footprint” • “Already use electric”	Theme: Cost efficiency, reliability, infrastructure • “cheaper” • “Because hookup is available and appliance for gas is cheaper usually than electric” • “Propane is quicker and cheaper.”	Theme: Indifference, situational factors, or landlord control • “Whichever is more reliable” • “doesn't matter” • “indifferent”

Regional Preferences Appliance Type Key Themes from Open Ended Responses – Fireplace

Region	Electric	Gas	No preference
Capital / North / Mohawk / Mid-Hudson	Theme: Safety, sustainability, modernization • “i do not feel safe with gas” • “heats area faster and less messy.” • “Have researched and believe electric would be better fit for our family.”	Theme: Cost efficiency, reliability, infrastructure • “Efficient - heat quickly/lasts longer than unit running more to maintain heat level/ lower waste footprint Cost - cheaper to operate” • “Cheaper, and available when the power goes out.” • “Alternative to oil”	Theme: Indifference, situational factors, or landlord control • “Wood” • “it would be wood fired”
Central NY / Southern Tier	Theme: Safety, sustainability, modernization • “Don't use” • “Easier installation seems likely” • “love the ease”	Theme: Cost efficiency, reliability, infrastructure • “wood burning preferred” • “If I had a firelplace, I would go with gas.” • “The dancing flames are part of the reason for having it”	Theme: Indifference, situational factors, or landlord control • “Don’t own” • “Not sure yet” • “Would stay with wood”
Downstate (NYC + Long Island)	Theme: Safety, sustainability, modernization • “id like to one day own a home with solar pannels and a battery” • “I think this would be a better choice.” • “Don't have but I wld want electric bc it seems safer/easier to use”	Theme: Cost efficiency, reliability, infrastructure • “Easy” • “Ambiance”	Theme: Indifference, situational factors, or landlord control • “Prefer wood burning” • “Na” • “I don't need or want a fireplace”
Western NY	Theme: Safety, sustainability, modernization • “Electric already hooked up” • “More environmentally friendly” • “Solar baby”	Theme: Cost efficiency, reliability, infrastructure • “prefer a flame over a blower” • “cheaper” • “I prefer the more real look of a gas fire vs an electric one”	Theme: Indifference, situational factors, or landlord control • “We have a wood burning fireplace and plan to keep it” • “Would not install” • “We don't have a working fireplace and are too old to use our wood furnace.”

Concerns of all electric house by Region

Region	Theme	Quote
Capital / North / Mohawk / Mid-Hudson	Cost	“It will cost me a lot more”
	Reliability	“What about when the power goes out… it gets cold in January.”
	Performance	“It’s too cold for heat pumps”
	Freedom/Choice	“COST, with no alternative options”
	Policy	“No use for this law… solar farms have toxic waste when decommissioned”
	Technology Concerns	“Power failures” / “Need costly water heater upgrades… new cookware required”
	Environment	“Fossil fuels used to generate electricity will harm the environment”
Central NY / Southern Tier	Cost	“Besides the added cost and inefficiency? No.” / “Utility costs… I want a choice.”
	Reliability	“Power outages” / “Reliability in our climate”
	Performance	“Gas stove allows me to boil water during an outage.” / “I heat with propane.”
	Freedom/Choice	“Don’t want my energy source mandated” / “Could significantly impact my budget and quality of life.”
	Policy	“Utilities will force the government to allow rate hikes.”
	Technology Concerns	“Too reliant on a single point of failure.”
	Environment	“Grid not reliable in subzero, snowy conditions.”
Downstate (NYC + LI)	Cost	“Battery storage tech/cost” / “Electric heat = more frigid days… busted pipes”
	Reliability	“Wiring problems affect all tenants… longer time without service” / “Power outages”
	Performance	“Power outage impacts everything—heat, cooking, medical equipment”
	Freedom/Choice	“Limited backup energy options”
	Policy	“Recent legislation could raise utility costs”
	Technology Concerns	“Battery cost” / “Power failures”
	Environment	“Green laws = increased upfront investment in older buildings”
Western NY	Cost	“Yes—the cost” / “Gas is more efficient… It costs more to run electric.”
	Reliability	“Yes, power outages” / “If the grid has an outage, no backups.”
	Performance	“If the power went out in winter, I’d have no source of heat at all.”
	Freedom/Choice	“I don’t like not having a choice” / “Older homes will need costly upgrades… plus higher property taxes.”
	Policy	“Electric stoves are horrible… why is the government telling me how to live?”
	Technology Concerns	“Single point of failure” / “The possibility of failure”
	Environment	“How it impacts the environment in the long run” / “Winter is too cold”

Additional Comments

Theme	Summary of Feedback	Representative Quote
Cost	• Respondents are deeply concerned about added costs for builders and homeowners, especially without rebates or incentives.	• *"All-electric houses are expensive to build, and utilities get expensive."*
Reliability	• Many feel the electric grid cannot currently handle increased demand, particularly in rural or snow-prone regions.	• *"Infrastructure cannot handle the increased needs for electric power."*
Performance	• Heat pumps and electric appliances were often criticized as inefficient in cold weather or less desirable than gas for heating and cooking.	• *"How does a heat pump work efficiently in a cold stretch in rural upstate NY?"*
Freedom/Choice	• A major theme was loss of consumer choice, with many calling the law “draconian” or “overreach.”	• *"It's taking away our choices."*
Policy	• Many see the law as politically motivated or poorly implemented, suggesting it lacks local adaptation and burdens homeowners more than large emitters.	• *"This is the most irresponsible law/act we have had to date."*
Technology	• Concerns were raised about readiness of the grid, heat pump viability, and lack of incentives to drive voluntary adoption.	• *"We are not ready. The grid isn't ready. Brownouts are coming."*
Environment	• Even among skeptics, there’s recognition that climate action is necessary, though many feel this law is misguided or insufficient.	• *"Intentions to protect our climate are worthy, but this feels misguided."*
Neutral/Other	• Some residents admitted they needed more information or expressed general frustration with state leadership.	• *"I don’t know enough. I’d like to see facts on the costs and benefits."*

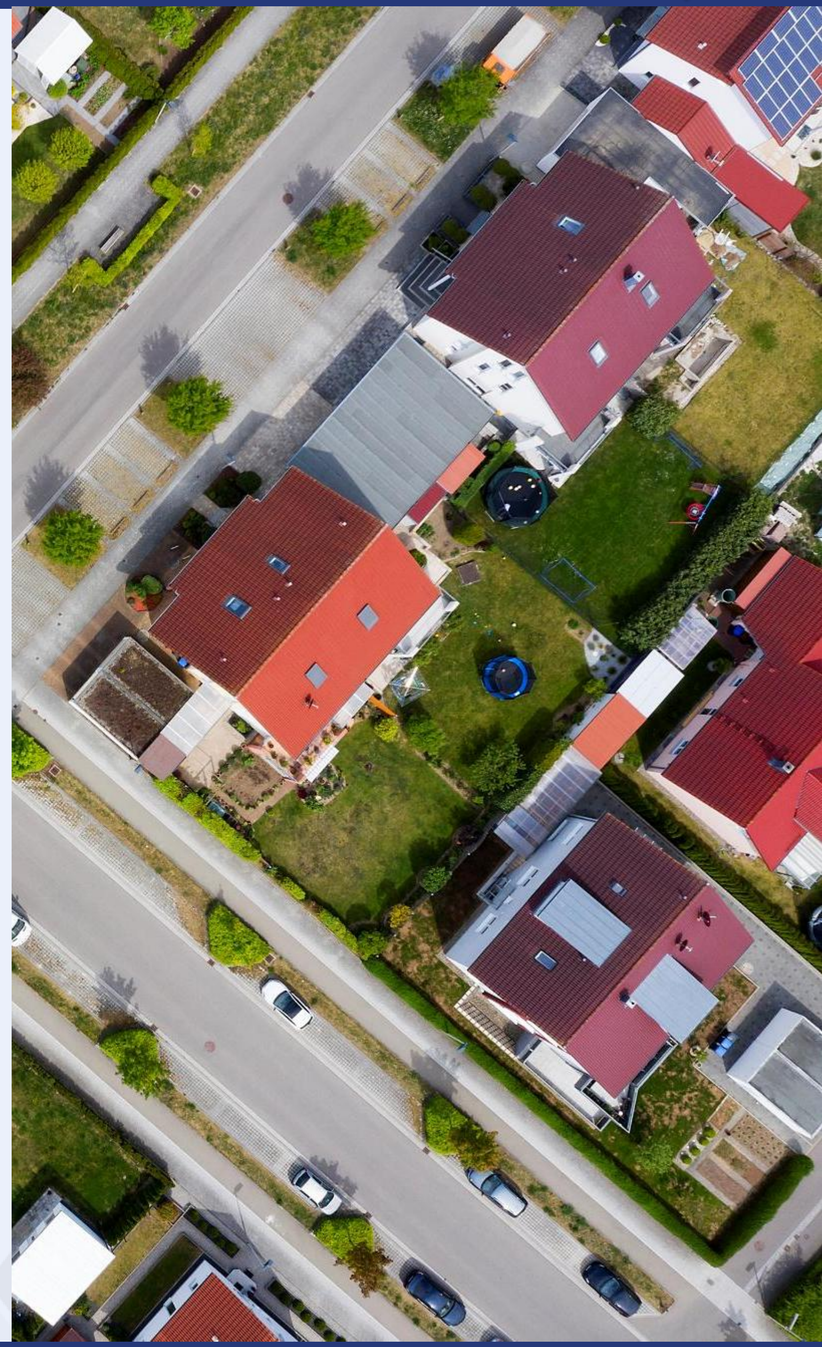
Trust in Energy Information Sources Is Consistent Across Regions—with Family and Friends Rated Most Highly (Regional Analysis)

Across all four New York regions, **family and friends** are the most trusted source for energy-related information, with average trust ratings ranging from **3.2 to 3.5** on a 5-point scale. This consistency highlights a strong personal-network influence on energy information.

Trust in **local government or municipalities** is relatively stable across regions (mean scores between **2.6 and 3.0**), slightly higher than **state government** and **utility companies**, which both hover closer to the mid-2 range. **Social media** is the least trusted source across all regions, receiving a **2.0** in three regions and only higher (**2.4**) in Downstate.

Downstate respondents exhibit slightly higher levels of trust across nearly all institutional sources, including the **New York State government (2.9)**, **utility companies (2.9)**, and **environmental groups (3.1)**, compared to other regions.

Region	Capital / North / Mohawk / Mid-Hudson	Central NY / Southern Tier	Downstate (NYC + Long Island)	Western NY
▪ **New York State government**	2.5	2.6	2.9	2.4
▪ **Home builders**	3.0	2.9	3.1	2.9
▪ **Utility companies**	2.6	2.4	2.9	2.6
▪ **Environmental groups**	3.0	3.0	3.1	2.8
▪ **News media**	2.6	2.4	2.9	2.6
▪ **Social media**	2.0	2.0	2.4	2.0
▪ **Family/friends**	3.5	3.2	3.5	3.5
▪ **Your local government or municipality**	2.7	2.7	3.0	2.6
▪ **New York State government**	2.5	2.6	2.9	2.4



Survey

New York State Home Builders Association Electrification Survey
Perceptions of New York State All-Electric Buildings Law
June 13th, 2025 – DRAFT

EMAIL: SAMPLE LANGUAGE – Notification from RMS to ViewPoint Panel Members (Purchased List Panel)
From: TBD
Subject Line: Your Opinion Matters – New York State Residents
Opinions matter, and for yours, we will enter you into a raffle to win one of 4 fifty-dollar ($50) VISA gift cards.

We've **[Research & Marketing Strategies (RMS)]** been asked to conduct a brief survey to better understand New York State (NYS) residents' thoughts and opinions around the 2023 NYS All-Electric Buildings Law. This survey will only take about 10 minutes to complete, and your input is critical. RMS will ensure that the survey is conducted independently and help ensure confidentiality/anonymity.

To take the survey click here: [INSERT SURVEY LINK]

Your responses will be sent directly to our secure electronic mailbox and will be kept anonymous and confidential. The report summarizing all the feedback and comments will be prepared in the aggregate and will not identify any individual respondent names. If you have any questions or comments about the survey, please contact us at Research@RMSresults.com.

Thank you for taking the time to provide us with your valuable thoughts and feedback.

OPENING SCREEN OF SURVEY

Welcome to the New York State All-Electric Buildings Law Survey! Before you begin…

Note: Please use the back and next buttons on the screen shown below to navigate through the survey. Do not use the back or forward arrows of your internet browser or you will be forced to restart your survey.

Your responses will be sent directly to us (RMS) and will be kept anonymous and confidential. The report summarizing all the feedback and comments will be prepared in the aggregate and will not identify any individual respondent names.

If you have any questions or concerns while taking this survey, please contact us at Research@RMSresults.com.

Click the 'Next' button to begin the survey!

SCREENING QUESTIONS

S1. Do you currently live in NYS?
- Yes
- No

S2. What is your ZIP Code? _____ (Non-NYS residents disqualify)

S3. In what county do you live?
- *Drop down of NYS Counties*

S4. Do you currently:
- Rent **[GO to Q1]**
- Own a home
- Other (Please explain): _____ **[GO to Q1]**

S5. [If S4=2] Was your home a new-build when you moved in?
- Yes **[Go to S7]**
- No

S6. Approximately what year did you move into your home? _____

S7. Approximately what year was your home built? _____

S8. Approximately how many sq. feet is your home? _____

SURVEY QUESTIONS

1. Please indicate the energy source for each of the following systems in your current home:

System	Gas	Electric	Unsure	Other (Please explain)	I do not have the appliance/system in my home.
Furnace					
Water Heater					
Stove/range					
Wall Oven					
Dryer					
Fireplace					

2. If you had to replace/install the following systems in your home today, would you choose gas or electric?

System	Gas	Electric	No preference	Please explain
Furnace				
Water Heater				
Stove/range				
Wall Oven				

Dryer				
Fireplace				

3. From the following list, please select the 5 most important factors when purchasing a home?
Please select 5 items
   - Style (e.g. ranch, colonial, split level, contemporary, craftsman, etc.)
   - Square Footage
   - Neighborhood
   - Schools
   - Bathrooms
   - Commute
   - Layout
   - Heating Structure and Appliances
   - Mortgage
   - Price
   - Energy efficiency
   - Installation of "green" technology (i.e., heat pump, solar panels)
   - Other: (Explain)

4. If you had to choose, which of the following would you prioritize **MOST** when building a new home?
Select one.
   - Lower up-front construction costs
   - Lower long-term utility costs
   - Reduced environmental impact
   - Flexibility in energy source (gas/electric)
   - Reliability during power outages
   - Resale value
   - Ease of maintenance

5. How aware are you of the NYS All-Electric Buildings Act, enacted in 2023?
   - Not at all aware
   - Slightly aware
   - Somewhat aware
   - Moderately aware
   - Extremely aware

The **New York State All-Electric Buildings Act**, enacted in 2023 as part of the state's Climate Leadership and Community Protection Act goals, mandates that most new buildings in the state be constructed without fossil fuel hookups. Starting **January 1, 2026**, all new residential buildings **seven stories or less** must be fully electric, meaning systems like heating, cooling, water heating, and cooking must not rely on natural gas, propane, or oil.

There are some exceptions for critical infrastructure and backup systems. For **larger buildings over seven stories**, the requirement begins **July 1, 2028**.

Please see the table below for a brief explanation of how the change will impact new home construction. This is not an exclusive list, but shows a high-level overview of what the legislation will require for common appliances in new homes.

System	Traditional (Banned in NEW home construction starting in 2026)	Non-Fossil Fuel Alternative
Furnace	Natural gas	Heat Pump
Water Heater	Propane/gas/oil	Heat pump water heater, all electric water heater
Stove/Oven	Gas	Electric/induction
Dryer	Gas	Electric or heat pump dryer
Fireplace	Gas	Electric

6. Based on your current knowledge of this law, how supportive are you of this legislation?
   - 1 - Not at all supportive
   - 2
   - 3 - Neutral
   - 4
   - 5 - Very supportive

6a. Please explain why you shared your level of support as [Q6 response]:

7. How likely are you to purchase a brand-new construction home in 2026?
   - 1 - Not at all likely
   - 2
   - 3
   - 4
   - 5 - Very likely

8. [IF Q7=1,2,3] You responded with a score of a [Q6] about the legislation. What level of support would you provide if you were planning on building a new home in 2026?
   - 1 – Not all supportive
   - 2
   - 3
   - 4
   - 5 – Very supportive
   - No change in my level of support. I'd still provide a score of {Insert Q5 response}.

8a. [IF Q8=1-5] Why did your score change?

9. [IF Q7=4,5] Since you are planning or considering building a new home in 2026, please share how this legislation has impacted your decision to build a new home in NYS:

10. [IF Q7=1,2,3] Are you planning or considering moving into a different home in 2026 (not new construction)?
    - Yes
    - No

11. [IF Q10=Yes] Since you are planning or considering moving to a different home (not new construction), how important a role did this legislation restricting gas appliances play in your decision making?
    - 1 - Insignificant
    - 2
    - 3
    - 4
    - 5 - Significant

12. What do you perceive as the benefits of this law?

13. What concerns do you have about this legislation?

14. How do you believe this law will impact the cost of utility bills for homeowners?
    - Greatly increase utility costs
    - Somewhat increase utility costs
    - Have no impact on utility costs
    - Somewhat decrease utility costs
    - Greatly decrease utility costs
    - Not sure

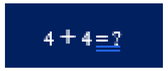
14a. Please explain why you believe this law will {Q14 response} the costs of utility bills:

15. Do you have any concerns about living in an all-electric house?

16. How confident are you that the state's electric grid can handle the increased demand this will create?
    - Very confident
    - Somewhat confident
    - Not very confident
    - Not at all confident
    - Not sure

16a. Please explain:

Qual1. This is an attention question. Please provide the correct answer to the math problem in the image below.
    - 2
    - 4
    - 6
    - 8
    - 12
    - Unsure



17. Which statement best reflects your view of the legislation?
    - The policy is too aggressive and not worth the potential climate benefits
    - The policy is aggressive, but the climate benefits make it worthwhile
    - The policy is reasonable and appropriately timed
    - The policy doesn't go far enough to address climate change
    - Not sure

17a: Please explain:

18. How much additional cost do you think this will add to the construction of a new home?
    - No added costs
    - Less than $5,000
    - $5,000 to $10,000
    - $10,001 to $20,000
    - More than $20,000
    - Not sure

19. If you were planning to build a new home in New York, how much additional cost would you personally be willing to pay to comply with the state's 2026 all-electric home requirement for new construction?
    - I would not be willing to pay any additional construction costs.
    - Up to $5,000
    - $5,001 to $10,000
    - $10,001 to $20,000
    - More than $20,000
    - I would decide not to build a new home because of this requirement.
    - Not sure

20. If you were planning to build a new home in New York in 2026 or after (beyond?), how much additional costs on your utility bill **per month** would you expect to pay to comply with the all-electric home mandate for new construction?
    - I would not anticipate any additional costs.
    - 1%-5%
    - 5%-10%
    - 10%-15%
    - 15%-20%
    - 20% or more

- Unsure

21. Having completed this brief survey, did your opinion of the NYS initiative regarding reduction in the use of fossil fuels change at all?
    - Yes [GO TO Q21a]
    - No [GO to Q22]

21a. On a scale of 1 to 10, with 1 being "strongly oppose" and 10 being "strongly favor," please now rate your overall support for the NYS All-Electric Buildings Act.

Strongly Oppose									Strongly Favor
1	2	3	4	5	6	7	8	9	10

22. Please share any additional feedback or questions you have regarding the NYS All-Electric Buildings Act:

Now we have just a few final questions…

23. Does your home currently have a backup generator?
    - Yes (If yes, what type?)
    - No

24. If you were to purchase or install a home backup generator, would you prefer a traditional gas-powered system or a non-fossil fuel option powered by stored renewable energy (such as solar)?

Note: A non-fossil fuel generator stores electricity from renewable sources (like solar). It contains a battery system (usually lithium-ion), an inverter, and smart controls. These systems are silent, emission-free, and capable of powering essential home appliances during outages. In contrast, gas or propane generators rely on fossil fuels and emit carbon during operation.

- I would prefer a **non-fossil fuel generator** (solar/battery-based)
- I would prefer a **gas-powered** or **propane generator**
- **Not sure** / I need more information
- I would not consider purchasing a home generator

25. How confident are you in the reliability of an all-electric and non-fossil fuel backup energy source (such as a home battery system, examples include a Tesla Powerwall, Bluetti, or Jackery Solar Generator) during a power outage?
    - Not at all confident
    - Slightly confident
    - Moderately confident
    - Very confident
    - Extremely confident

26. Currently, New York's electrification law applies only to newly constructed homes starting in 2026. Would you support or oppose expanding this law to include *all* homes in New York State, including existing homes during renovations or appliance replacements?
    - Strongly support
    - Somewhat support
    - Neither support nor oppose
    - Somewhat oppose
    - Strongly oppose
    - Not sure

26a. Please explain:

27. How much do you trust the following sources to provide accurate information about all-electric home construction?

Source	Do not trust	Slightly Trust	Neutral	Somewhat Trust	Completely Trust
New York State government					
Home builders					
Utility companies					
Environmental groups					
News media					
Social media					
Family/friends					
Your local government or municipality					

DEMOGRAPHICS

D1. What is your gender?
- Female
- Male
- Prefer to self-describe (Please specify: _____)
- Prefer not to answer.

D2. What is your annual household income?
- Less than $25,000
- $25,000-$49,999
- $50,000-$74,999
- $75,000-$99,999
- $100,000-$124,999
- $125,000-$149,999
- $150,000-$199,999
- $200,000 or more
- Prefer not to answer.

D3. Which of the following best fits your age range?

- 18-24
- 25-34
- 35-44
- 45-54
- 55-64
- 65-74
- 75+
- Prefer not to answer.

I1. Would you like to be entered into the raffle for one of four $50 virtual gift cards from RMS as a thank you for your participation?

- Yes
- No

I2. **[IF YES]** Winners will be chosen at random and will be notified via email. Please provide the following information so you may be contacted if you win. This contact information will not be connected to your survey responses, will remain confidential, and will only be used to contact you if you win.

First Name: _____
Last Name: _____
Preferred Email Address: _____

SUBMIT SCREEN

Thank you very much for your time today!

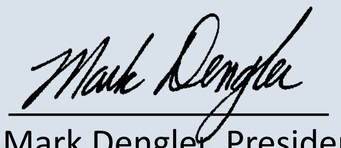
Please click the red submit button below to complete your survey.

LIMITING TERMS & CONDITIONS

All source materials and information so gathered and presented herein are assumed to be accurate, but no implicit or expressed guarantee of data reliability can be assumed. This study has been prepared in the interest of a fair and accurate report, and therefore all of the information contained herein, and upon which opinions have been based, have been gathered from sources that Research & Marketing Strategies, Inc. (RMS) considers reliable.

RMS staff has reviewed and inspected the primary data results obtained from the surveyed individuals from the client. RMS has no undisclosed interests in the subject for which this analysis was prepared, nor does RMS have a financial interest in the client other than as a contracted vendor for this research. RMS' employment and compensation for rendering this research is not contingent upon the values found or upon anything other than the delivery of this report for a pre-determined fee.

The findings of this market study are indicators of the current opinions and perceptions of the surveyed individuals based on the designed methodology. They do not guarantee product or service success but are to be considered a tool to supplement management activities. The contents of this study are for limited private use only. Possession of this report, or a copy thereof, does not carry with it the right of publication nor may it be used other than for its intended use by anyone other than the client, without the prior written consent of the client or RMS. No change of any item in this study shall be made by anyone other than RMS. Furthermore, RMS shall have no responsibility if any such change is made without its prior approval.

Certified by: 

Mark Dengler, President
Research & Marketing Strategies, Inc.

Date: July 31, 2025

RMS

Ask. Listen. Solve.

If you have questions about this report or would like more information about RMS' services, please reach out to Patrick Fiorenza, Senior Director of Research Analytics at RMS. Patrick can be reached at: PatrickF@RMSresults.com and by phone, 315-635-9802 ext. 214.

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