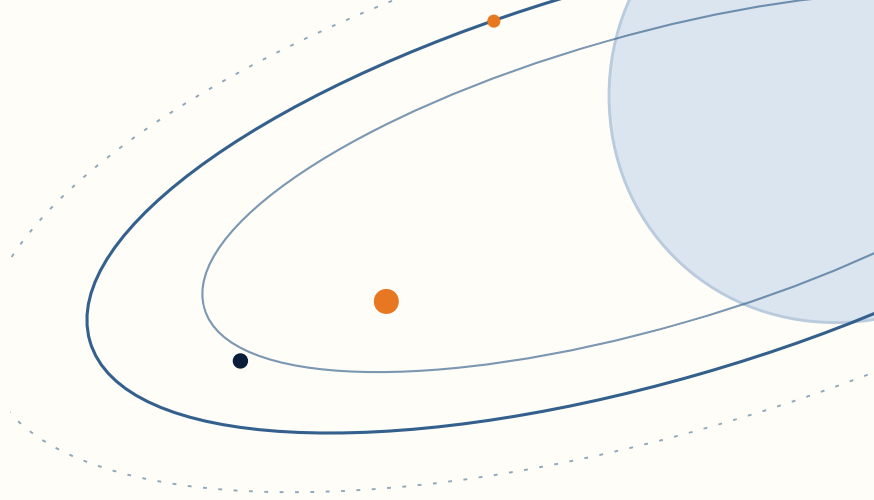




EXECUTIVE BRIEFING

The 2026 American *Space* *Economy* Study

*What American voters believe, what it means for the space industry,
and what your company needs to know next.*

1,009

Likely voters surveyed nationally,
October 2026

78%

Support federal spending on space

57%

Support private companies taking
major roles

01

THE LANDSCAPE

The Space Economy Has a Public Opinion Problem

America's commercial space industry is entering a new phase. Private companies are no longer simply building rockets or supporting government missions. They are becoming operators of infrastructure, providers of national security capabilities, and potential owners of entirely new markets.

But public acceptance of that expanding role is far from settled.

Our October 2026 national study of 1,009 likely voters finds that **78% support federal spending on space**, while **57% support private companies taking major roles**. Beneath that majority, however, lie deep divisions across political parties, generations, technologies, and individual companies.

Republicans overwhelmingly support a larger private-sector role, at 89%. Just 31% of Democrats agree, along with 48% of independents. The generational divide is equally striking: only 29% of voters under 45 support major private-sector roles, compared with 66% of voters 45 and older.

These divisions create a consequential challenge for the industry. A company may enjoy strong support for its technology while facing skepticism about its role in operating it. Voters may support American leadership in space without trusting the companies responsible for achieving it. They may welcome private investment while demanding more government oversight.

The opportunity is to understand those distinctions before they become obstacles.

TOPLINE

78%

Support federal spending on space

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Support private companies taking major roles

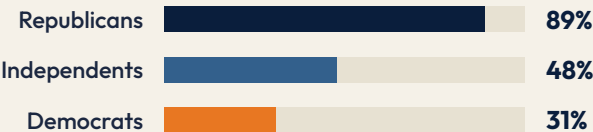
SAMPLE

1,009

Likely voters, national, October 2026. Margin of error ±3.07 points.

SUPPORT FOR PRIVATE COMPANIES TAKING MAJOR ROLES IN SPACE

BY PARTY



BY AGE



WHERE THIS LEADS

The national study establishes where the industry stands. The next question is where your company stands, and what you can do to improve that position.

GOVERNMENT AFFAIRS

02 Prepare for the *New Congress*

The next policy debate will be about authority, oversight, and trust.

OPPOSITION HAS LIMITS

30%

of Democrats who oppose private companies taking major roles still support greater federal spending and partnerships with American companies

DEMOCRATS ON OVERSIGHT

Stronger oversight 69%

Move faster 9%

Stronger oversight of private space companies, even if it slows progress, versus allowing companies to move faster.

COMFORTABLE WITH PRIVATE SECURE MILITARY COMMUNICATIONS

All voters 72%

Democrats 58%

For companies dependent on federal contracts, appropriations, regulatory approvals, or national security partnerships, public opinion provides an important window into the political environment facing the next Congress.

The divisions are significant, but they are not absolute. Among Democrats who oppose private companies taking major roles in space, **30% nevertheless support greater federal spending and partnerships with American companies** to preserve the country's competitive advantage. That finding suggests that opposition to private-sector leadership does not necessarily translate into opposition to every government-industry partnership.

At the same time, oversight is a substantial political concern. **69% of Democrats favor stronger oversight of private space companies**, even if it slows progress, compared with just 9% who favor allowing companies to move faster.

National security presents another potential opening. **72% of voters, including 58% of Democrats**, are comfortable with private companies providing secure military communications.

These findings suggest that the strongest argument for a company's federal role may depend on what it is being asked to do, how that role is structured, and who is evaluating it.

THE DECISION FACING YOUR ORGANIZATION

Government affairs teams need more than general evidence that Americans support space exploration. They need to know which arguments are most persuasive when seeking a particular appropriation, defending a procurement program, explaining a regulatory position, or building support for an emerging capability.

A custom study can test competing arguments among relevant voters, congressional constituencies, and other appropriate audiences. The result is a stronger basis for deciding what to emphasize, what opposition to anticipate, and where to focus limited advocacy resources.

For the person responsible for government affairs, that means approaching leadership and congressional briefings with a tested case rather than an unverified assumption.

THE QUESTION
WORTH
COMMISSIONING A
STUDY TO ANSWER

Which argument builds the strongest support for our company's specific role in America's space program?

03 COMMUNICATIONS

Define Your Reputation Before Someone Else Does

Public familiarity is limited. Trust is not yet established.

For many companies in the commercial space industry, the public has not formed a durable impression. More than half of voters have never heard of four of the nine companies tested for familiarity. Even when voters recognize a company, that recognition does not necessarily imply trust.

Among five companies evaluated on personality traits, every company except SpaceX scored **7% or lower on trustworthiness**. For two of the least-known companies, the trait selected most frequently was secretive.

These results do not mean that every unfamiliar company has a negative reputation. They suggest that the industry has substantial room to establish a clearer public identity. There is evidence that favorable perceptions can develop: among voters familiar with the companies tested, the best-liked organization achieved a **+20 net favorable rating**.

The distinction between awareness, favorability, and trust matters. A company may attract attention through a successful launch, a major contract, an acquisition, or an ambitious technology announcement. But visibility alone does not establish whether the resulting attention improves the company's standing.

THE DECISION FACING YOUR ORGANIZATION

Communications leaders routinely face consequential choices: which announcement to prioritize, how to explain an unfamiliar capability, whether to address a controversy directly, and which proof points will build credibility. An industry-wide benchmark cannot reveal what audiences actually believe about a particular company or which explanations would change those beliefs.

A custom reputation and message study can establish an initial benchmark, identify the attributes associated with the company, and test alternative approaches before significant communications resources are committed. It can also establish a repeatable measurement system, giving communications teams evidence of whether their efforts are improving public understanding over time.

Instead of reporting only media coverage, impressions, and engagement, a communications leader can show management whether the intended audiences are becoming more familiar with the company, more favorable toward it, and more trusting of its role.

FAMILIARITY



4 of 9 companies tested have never been heard of by more than half of voters

TRUSTWORTHINESS

7%

or lower for every company tested on personality traits except SpaceX

TOP TRAIT FOR THE TWO LEAST-KNOWN COMPANIES

Secretive

ROOM TO GROW

+20

Net favorable for the best-liked company among voters familiar with it

THE QUESTION WORTH COMMISSIONING A STUDY TO ANSWER

What do the audiences who matter most believe about our company, and which messages would most improve that perception?

04

MARKETING

Find the Story That Makes Your *Technology Matter*

Not every part of the space economy begins with the same advantage.

REPAIRING AND REFUELING SATELLITES IN ORBIT:
VIEWED AS PROMISING



The broadest cross-party appeal of any capability tested.

PRIVATE SPACE STATIONS AND
ORBITAL DATA CENTERS

25+

Point partisan gap on each of these emerging applications

Public enthusiasm for space technology varies considerably depending on what a company proposes to build. Some capabilities have remarkably broad appeal.

Repairing and refueling satellites in orbit is viewed as promising by 88% of Republicans and 78% of Democrats. That technology has an easily understood practical benefit: preserving the life and usefulness of expensive infrastructure already in orbit.

Other emerging applications face a more divided audience. Private space stations and orbital data centers each produce partisan differences exceeding **25 percentage points**.

These contrasts illustrate a larger challenge for companies developing unfamiliar products. The industry understands the engineering advantages of these technologies. The public may not yet understand why they matter.

For some products, the strongest message may be operational efficiency or cost savings. For others, it may be national security, American competitiveness, scientific progress, or the creation of entirely new capabilities.

The national findings show which categories currently have an advantage. They do not establish which explanation will be most effective for an individual product.

THE DECISION FACING YOUR ORGANIZATION

Marketing leaders need to choose which benefits to emphasize, which audiences to prioritize, and where to allocate campaign resources. Those decisions become particularly important when introducing products with long development timelines, unfamiliar applications, or significant regulatory and political exposure.

A custom study can test different descriptions of the same technology, measure the perceived value of competing benefits, and identify which audiences respond most favorably. The findings can inform advertising, positioning, public education, launch materials, and the broader commercial narrative.

For a marketing leader, the value extends beyond producing a more persuasive campaign. It means bringing the commercial team a defensible explanation of which messages deserve investment and why.

THE QUESTION
WORTH
COMMISSIONING A
STUDY TO ANSWER

Which benefits of our technology are most compelling to the audiences we need to reach, and how should we position them?

05

EXECUTIVES & STRATEGY

Measure the Risks That Could Shape Your Company's Future

The industry's long-term public acceptance is not guaranteed.

SUPPORT PRIVATE COMPANIES TAKING MAJOR ROLES, BY AGE



A 37-point gap between generations.

VOTERS UNDER 45

46%

Strongly oppose private companies taking major roles

One of the most consequential findings in the study is the divide between generations. Among voters under 45, just **29% support private companies taking major roles in space**, while **46% strongly oppose**. Among voters 45 and older, support reaches **66%**.

This is more than a demographic curiosity. It raises questions about how the industry's public standing may evolve, especially as younger voters become a larger share of the electorate.

It also challenges the assumption that enthusiasm for technological innovation necessarily translates into support for the companies developing it.

The implications differ by business model. A company providing national security communications may face different public concerns from one building private stations, supplying launch services, developing lunar infrastructure, or pursuing orbital computing.

Executives need to understand which risks are relevant to their business rather than treating public sentiment toward the space economy as a single measure.

THE DECISION FACING YOUR ORGANIZATION

Boards and investors expect leadership to identify emerging threats, understand market conditions, and allocate resources accordingly. Public opinion is one input into those decisions, particularly where a company's growth depends on government spending, regulatory acceptance, public trust, or support for new infrastructure.

A custom study can measure the company's reputation, identify potential barriers to acceptance, evaluate alternative strategies, and establish benchmarks for tracking progress. That evidence can support decisions about communications investment, policy engagement, market positioning, and stakeholder relationships.

For the executive sponsoring the research, the value is a clearer picture of the external environment and a stronger foundation for recommending action.

THE QUESTION
WORTH
COMMISSIONING A
STUDY TO ANSWER

Which public perceptions pose the greatest risk or opportunity for our company's growth, and what should we do about them?

06

WHAT COMES NEXT

From Industry Intelligence to *Company Intelligence*

The national study reveals four important realities.

- 01

Support for private companies in space is substantial, but highly uneven across political and demographic groups.
- 02

Public attitudes depend on the activity being considered. Support for satellite servicing does not necessarily imply support for private orbital infrastructure.
- 03

Many companies have yet to establish strong public familiarity or trust.
- 04

The industry's generational divide raises questions about its long-term political and reputational environment.

These findings are useful to every organization operating in the space economy. But the questions that matter most to an individual company remain unanswered.

The national study cannot tell a launch provider whether its next announcement will strengthen trust. It cannot tell a satellite operator which benefits are most persuasive to policymakers.

It cannot tell an emerging infrastructure company what voters believe about its business model or which concerns could become barriers to growth.

Those answers require research designed around the company's actual decisions.

WHAT A CUSTOM STUDY CAN DELIVER

RESEARCH PRIORITY	THE DECISION IT INFORMS
Reputation and awareness	What should we do to strengthen our standing?
Message testing	Which argument should we lead with?
Policy and stakeholder research	Where can we build support for our priorities?
Product perception	How should we explain and position our technology?
Audience analysis	Whom do we need to persuade?
Reputation tracking	Are our investments changing perceptions?

The objective is not simply to commission another report. It is to equip the people responsible for government affairs, communications, marketing, and corporate strategy with evidence that helps them make better decisions and demonstrate the value of their work.

07 • YOUR STUDY

The Next Study Should Be About Your Company

The American space economy is being built by companies with very different technologies, customers, business models, and political challenges. They should not all be relying on the same answers.

A national industry study is a starting point. It identifies the divisions, opportunities, and uncertainties that deserve attention. Your own study should turn those findings into decisions: which audiences matter, which messages work, which risks require action, and where your organization has an advantage.

At co/efficient, we design public-opinion research around those specific questions, using the findings to inform practical decisions rather than simply describe public attitudes.

Know where your company stands.

Know what moves support.

Know what to do next.

COMMISSION A STUDY OF YOUR OWN

Bring us the decision in front of your organization.

We'll help design the research that informs it.