



CLEAR  
PATH

# Clearpath

Survey and District-Level Modeling  
on Clean Energy and Climate Change

N=4,029 National Registered Voters  
January 7 - January 16, 2025



# Key Findings

- **Over 3-in-4 voters (76%) say it is extremely or very important that their Member of Congress supports clean energy.** This includes 62% of Republicans and 58% of Republican or Republican-leaning Independents who say they support Trump first, over the Republican Party.
- Respondents believe that **Republican members of Congress *should* care about clean energy (81%), up 2 points since 2024.**
  - **Less than half think that they *do* care about clean energy at 48%,** also up 2 points since 2024.
- **Strong majorities of respondents support a variety of clean energy policies, including:**
  - Tax incentives for American clean energy companies (77% support)
  - Tax incentives for American manufacturers who emit less carbon (76% support)
  - Reforms in the energy permitting process (70% support)
- **Innovation (61%) rather than stricter regulation (27%) is the preferred approach** for reducing carbon emissions.
- Majorities say they believe that **we can both develop cleaner AND more affordable energy at 85%, up 3 points since 2024.**
- Voters say it is most important to have **affordable energy (55%),** followed by **clean** and **reliable,** both at 39%.



**Voters want to see action from  
Congressional Republicans when it  
comes to clean energy.**



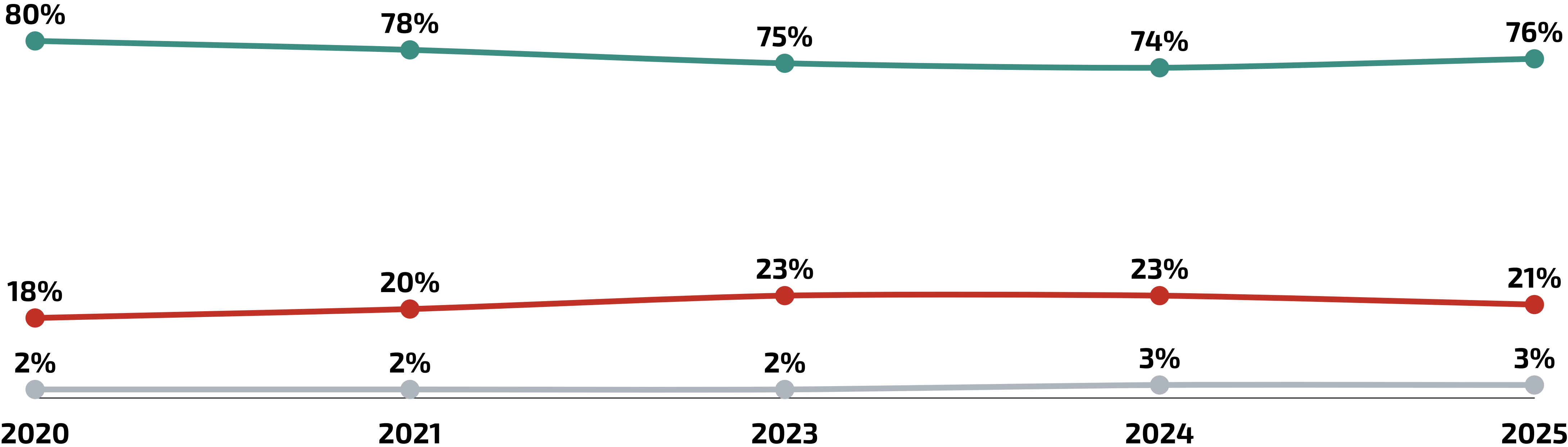
# Voters overwhelmingly say their member of Congress should support clean energy-friendly policies.

- **76% of respondents** say it is extremely or fairly important to them that their Member of Congress support policies that promote clean energy, up 2 points since 2024.
- This includes **62% of Republicans** and **74% of political independents**.



# Strong majorities of voters continue to say it is important for their member of Congress to support policies promoting clean energy

● Extremely/fairly important ● Not that/not at all important ● Unsure/DNR



Q. How important is it to you that your Member of Congress supports policies that promote clean energy?

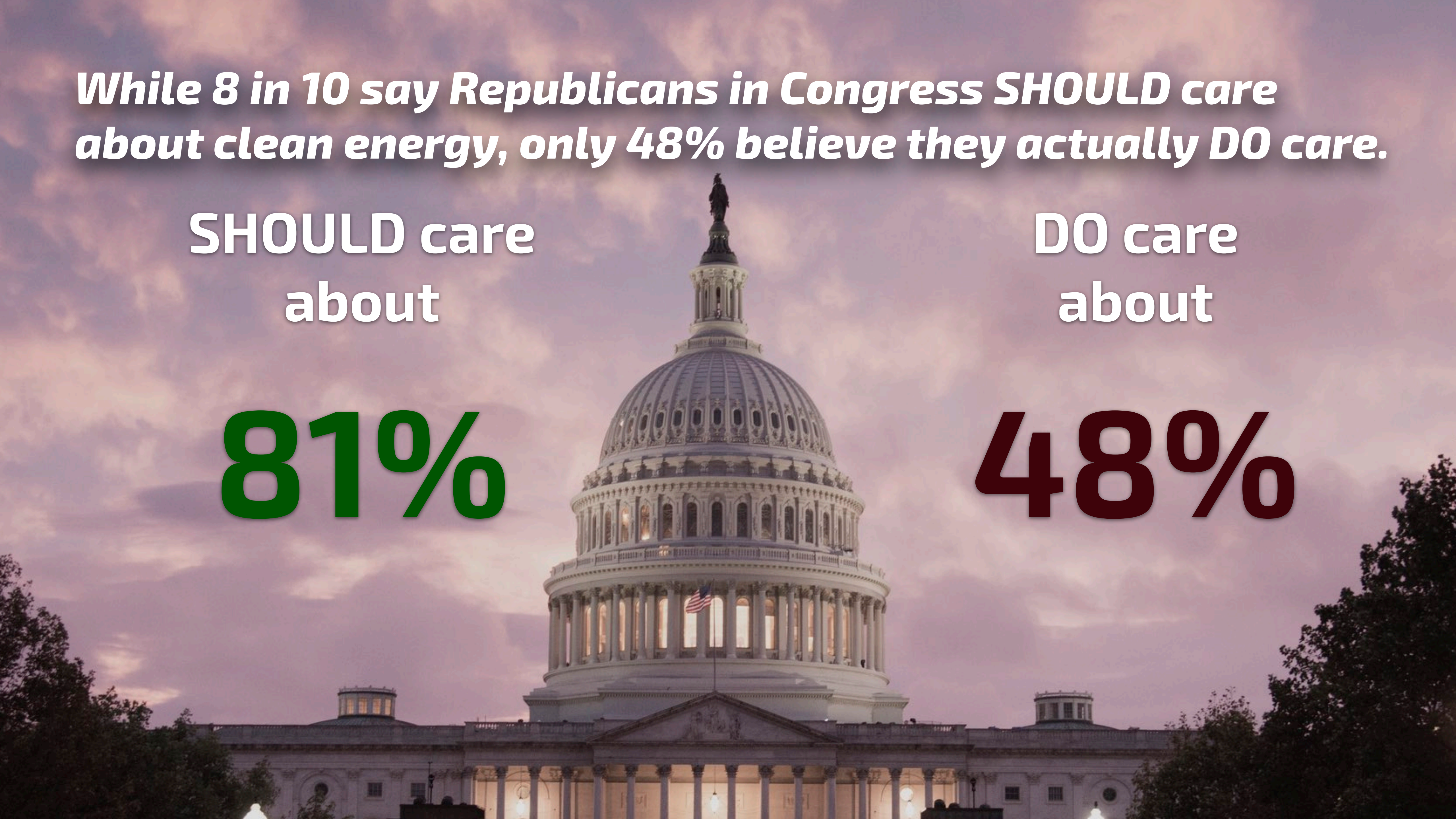
***While 8 in 10 say Republicans in Congress SHOULD care about clean energy, only 48% believe they actually DO care.***

**SHOULD care  
about**

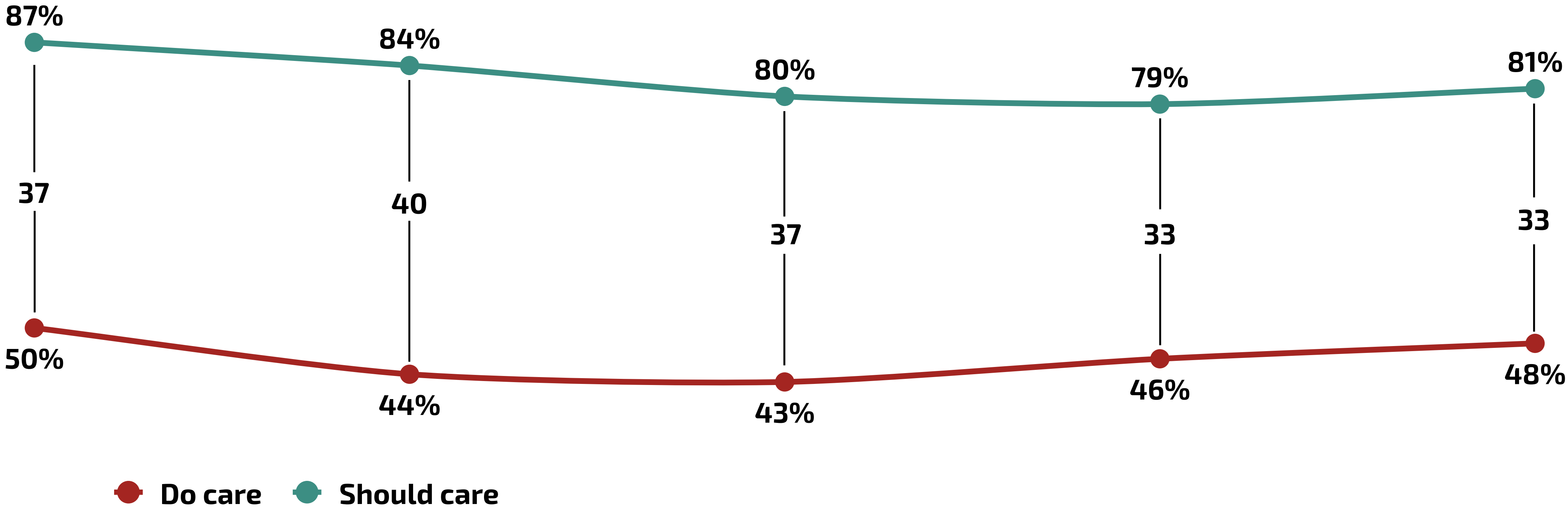
**81%**

**DO care  
about**

**48%**



# Gap is narrowing between how much Republicans DO and SHOULD care about clean energy

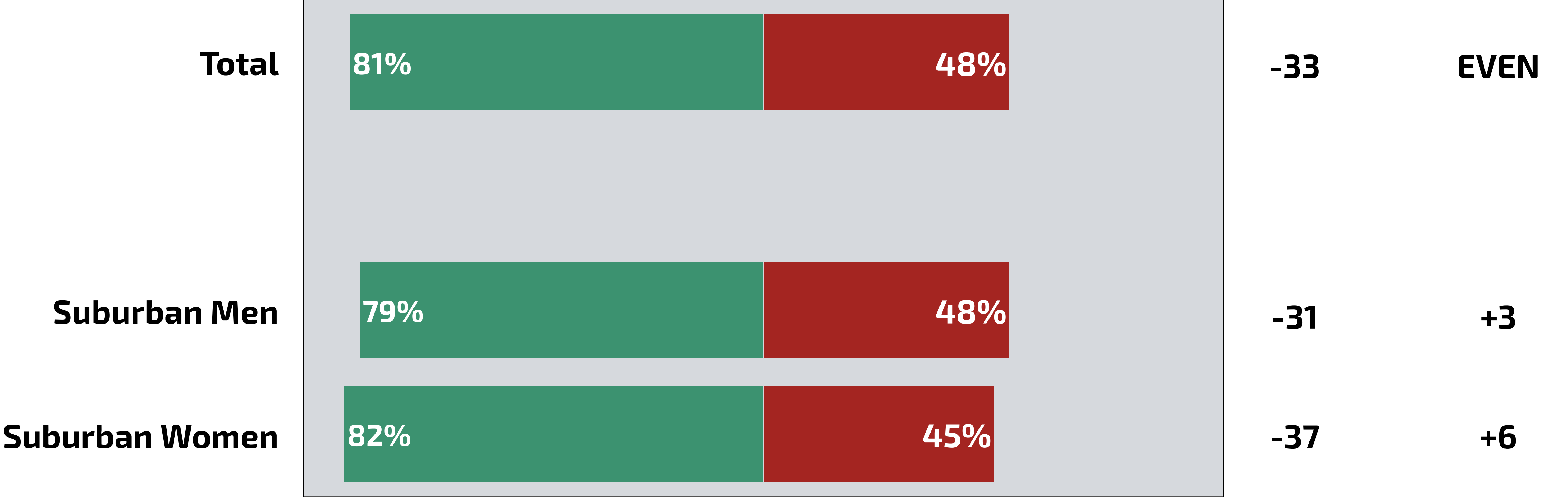


Q. For each of the following, please tell me if you agree or disagree with the statement. Clean energy is an issue that Republicans in Congress SHOULD care about.  
Q. For each of the following, please tell me if you agree or disagree with the statement. Clean energy is an issue that Republicans in Congress DO care about.  
Note: Showing those who selected "Strongly agree" or "Somewhat agree."

# Suburban women think Republicans should care about clean energy, but less than half think they do care

■ Should care
 ■ Do care

**NET (DO - SHOULD CARE)**  
**2025 NET**      **CHANGE**  
                          (2025 - 2024)



Q. For each of the following, please tell me if you agree or disagree with the statement. Clean energy is an issue that Republicans in Congress SHOULD care about.  
 Q. For each of the following, please tell me if you agree or disagree with the statement. Clean energy is an issue that Republicans in Congress DO care about.

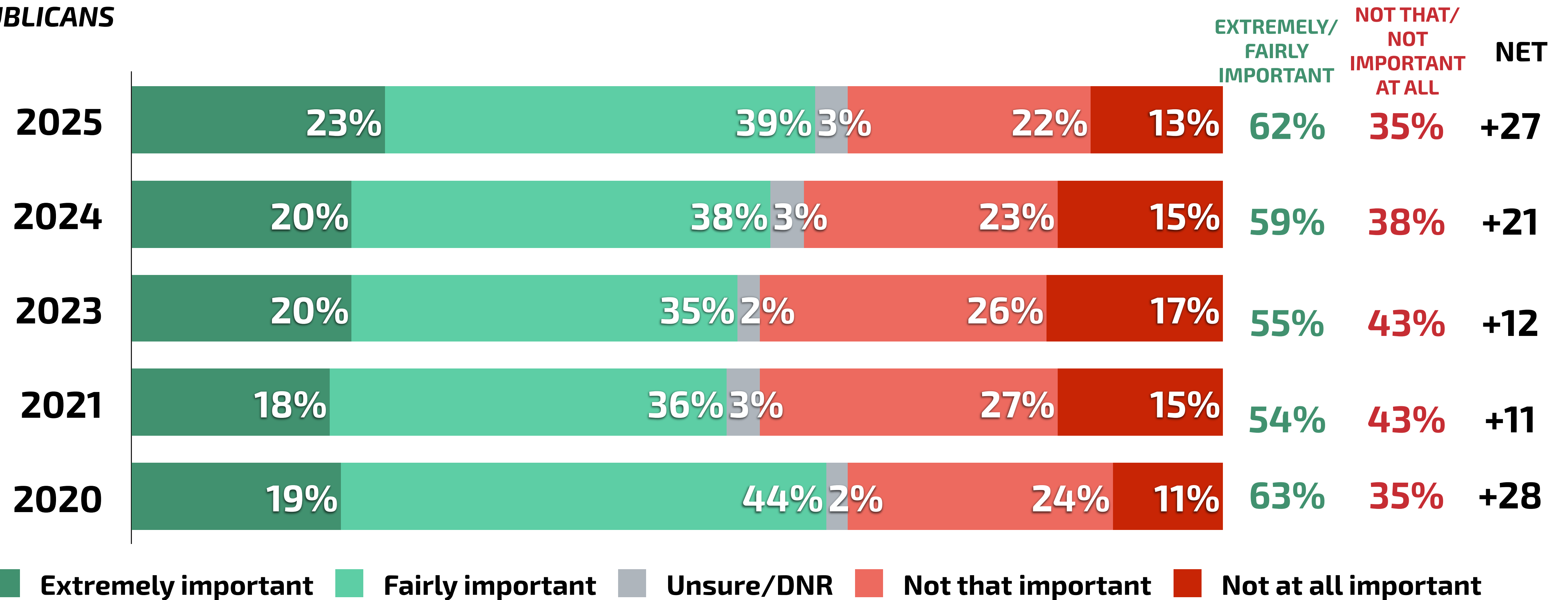


**What do *Republican voters* think about clean energy?**



# Republicans increasingly say it is important that their Member of Congress supports policies promoting clean energy

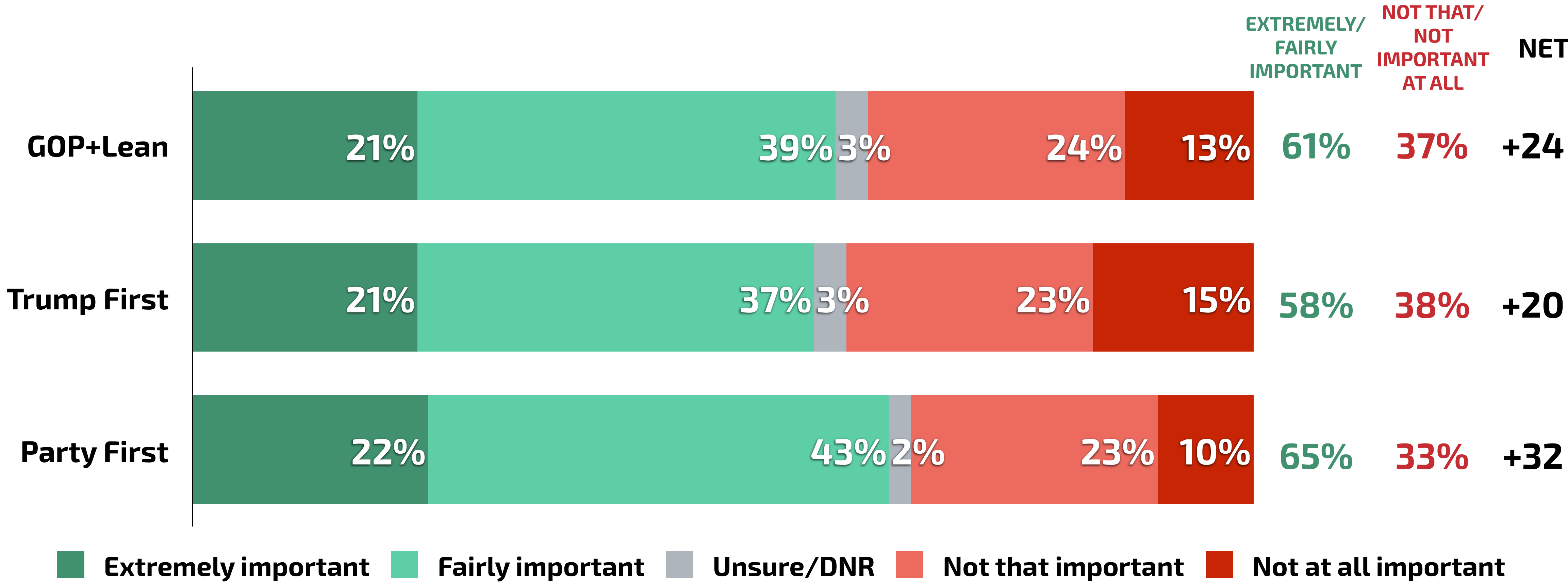
REPUBLICANS



Q. How important is it to you that your Member of Congress supports policies that promote clean energy?

Note: Only showing Republicans.

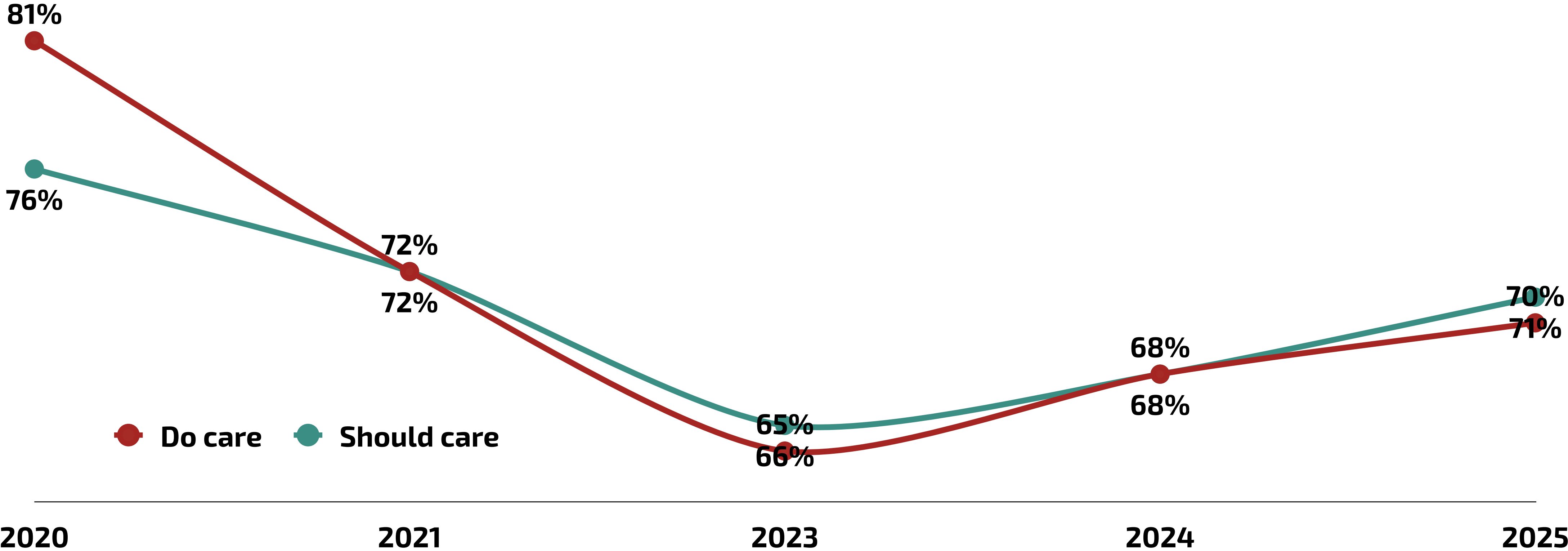
# Majorities of both “Trump first” and “Party First” voters feel it’s important for their Member of Congress to support clean energy



Q. How important is it to you that your Member of Congress supports policies that promote clean energy?  
 Note: “Trump First” and “Party First” are subsets of GOP+Lean which represent Republicans and Republican-leaning Independents.

# About the same number of Republicans think that GOP members of Congress should care about clean energy as those who think they already do

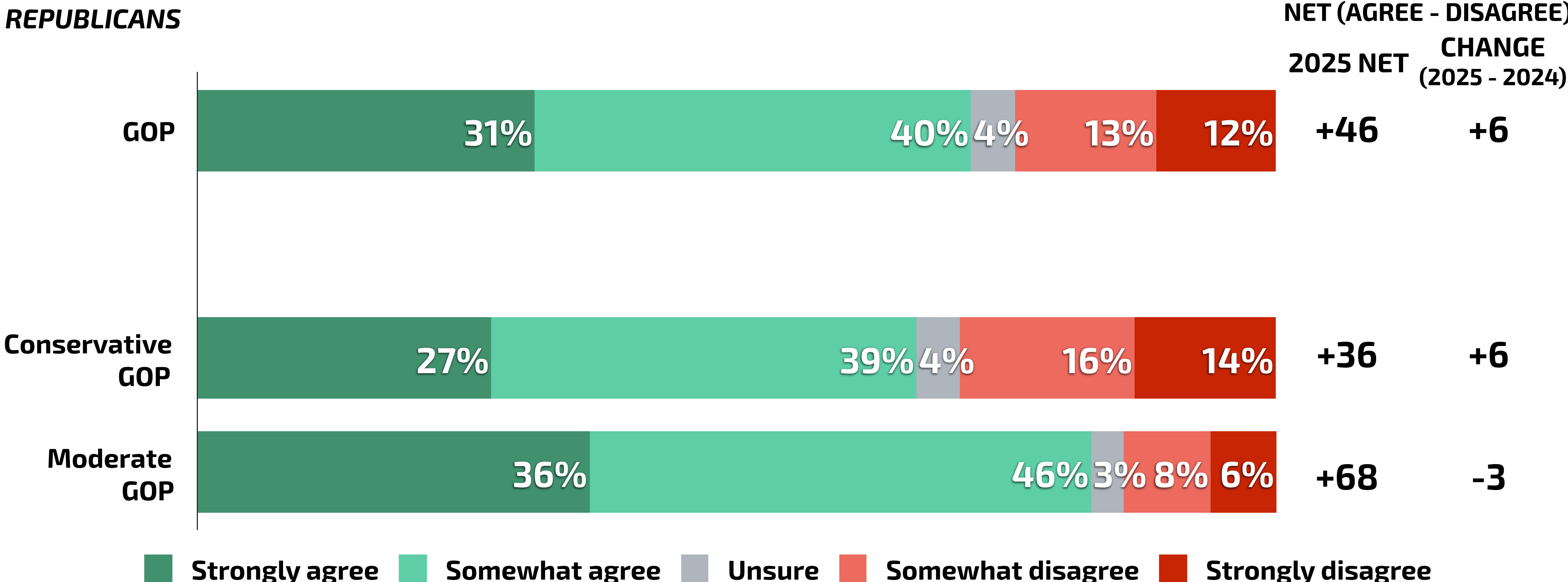
## REPUBLICANS



Q. For each of the following, please tell me if you agree or disagree with the statement. Clean energy is an issue that Republicans in Congress SHOULD care about.  
Q. For each of the following, please tell me if you agree or disagree with the statement. Clean energy is an issue that Republicans in Congress DO care about.  
Note: Only showing Republicans.

# Conservative and moderate Republicans agree by large margins that Republicans in Congress should care about clean energy

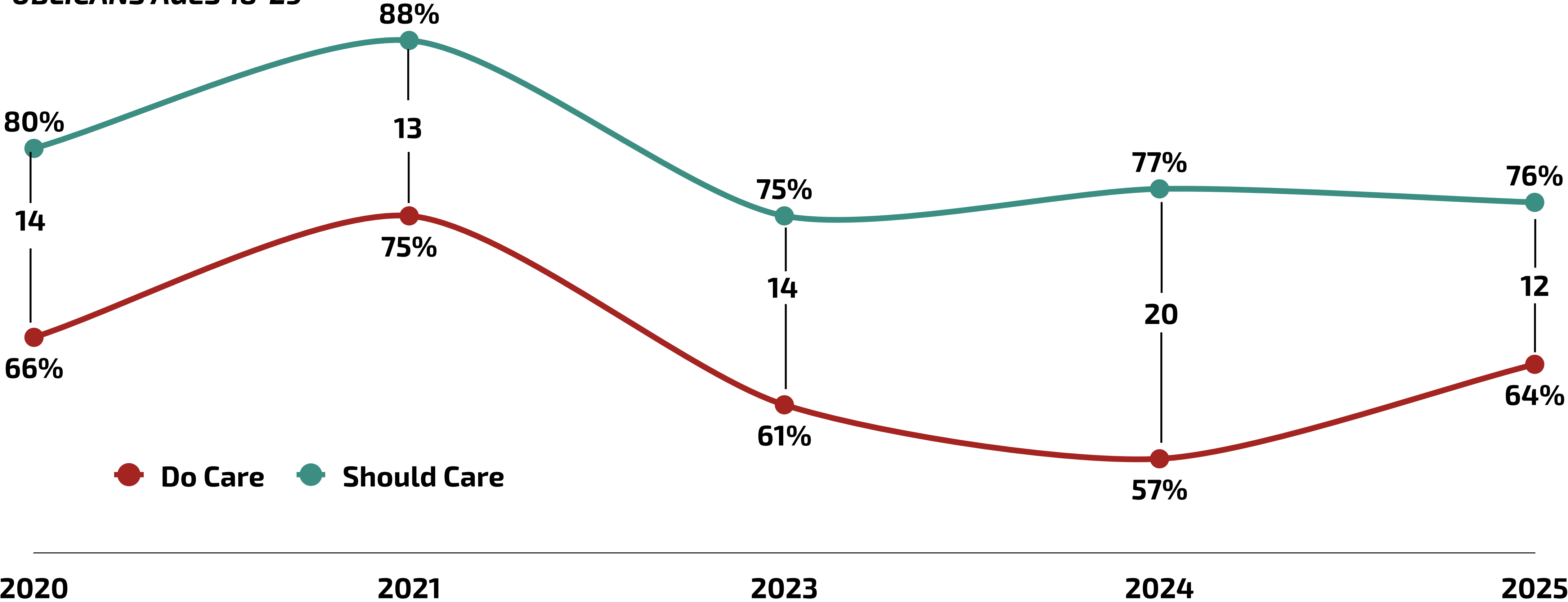
**REPUBLICANS**



Q. For each of the following, please tell me if you agree or disagree with the statement. Clean energy is an issue that Republicans in Congress SHOULD care about.  
 Note: Only showing Republicans.

# But for young Republicans, clean energy remains a major concern - and one they think their party needs to do better on

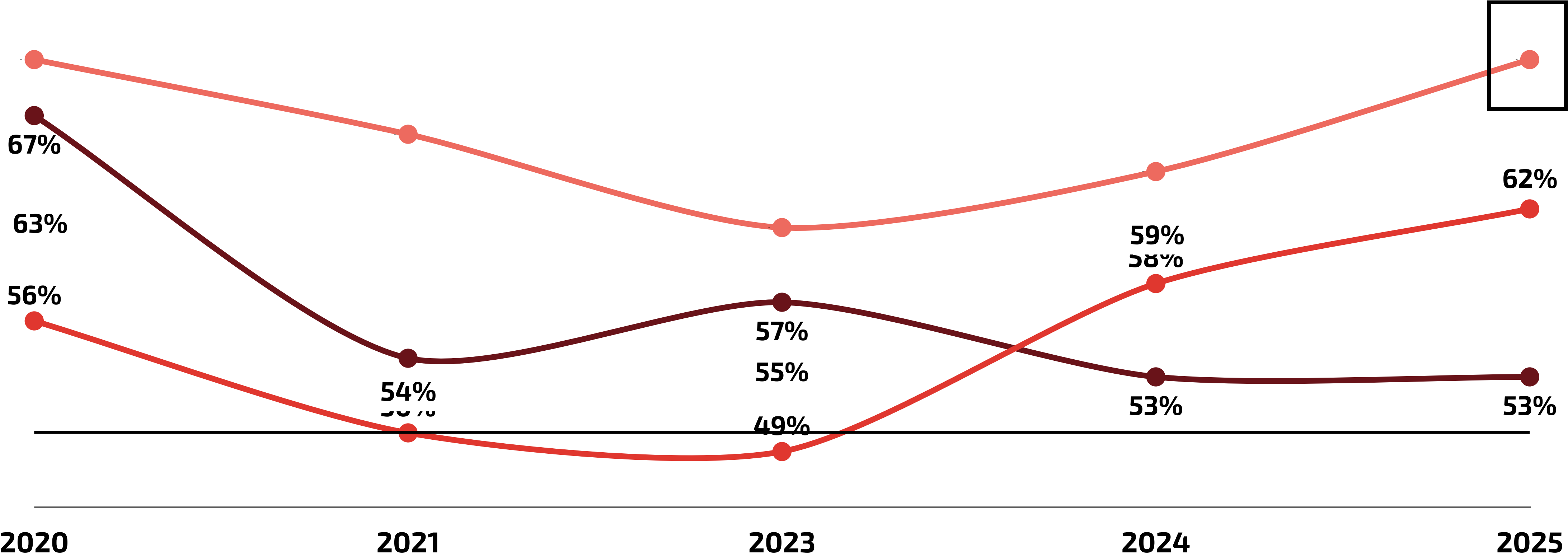
REPUBLICANS AGES 18-29



Q. For each of the following, please tell me if you agree or disagree with the statement. Clean energy is an issue that Republicans in Congress SHOULD care about.  
 Q. For each of the following, please tell me if you agree or disagree with the statement. Clean energy is an issue that Republicans in Congress DO care about.  
 Note: Only showing Republicans ages 18-29.

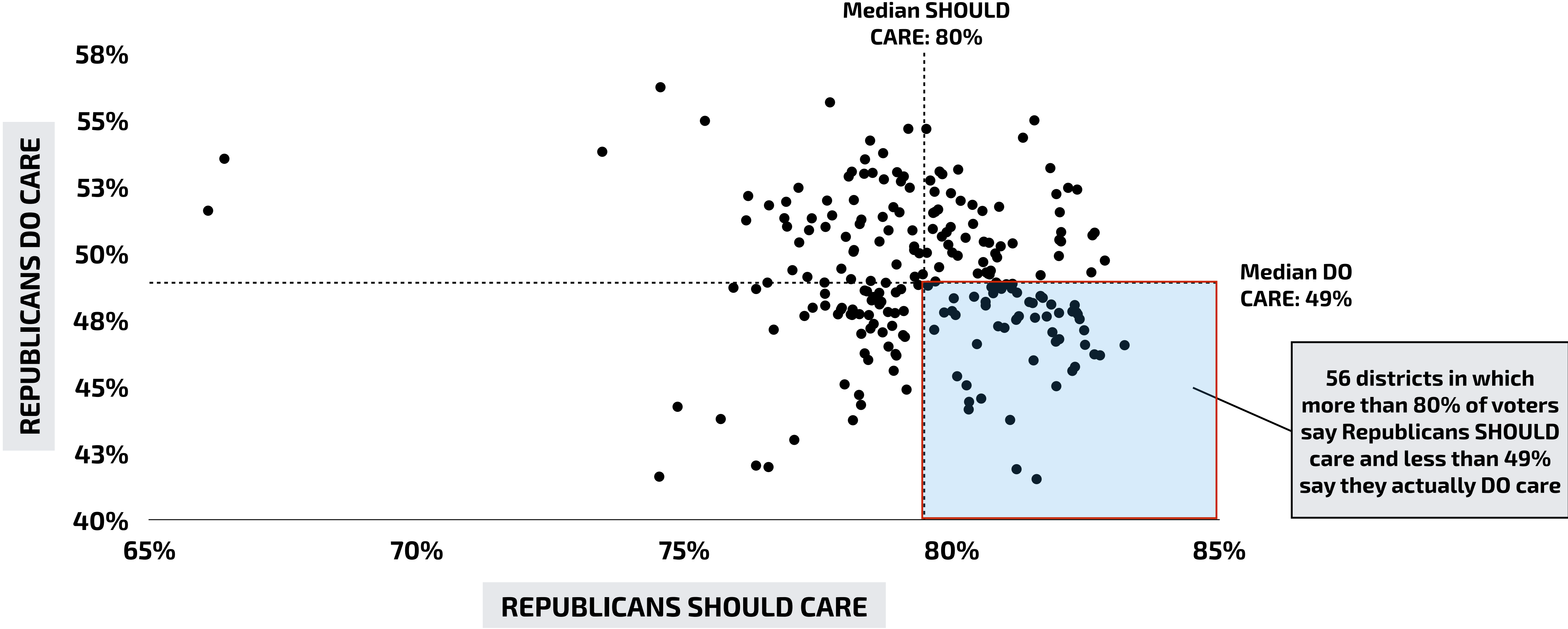
# Young Republicans also overwhelmingly agree that Republicans in Congress should care about clean energy

EXTREMELY/FAIRLY IMPORTANT ● GOP/18-39 ● GOP/40-64 ● GOP/65+



Q. How important is it to you that your Member of Congress supports policies that promote clean energy?  
 Note: Only showing Republicans and "Extremely important" or "Fairly important."

# In 56 Republican districts, there is a wide gap between voters saying Republicans SHOULD and DO care about clean energy

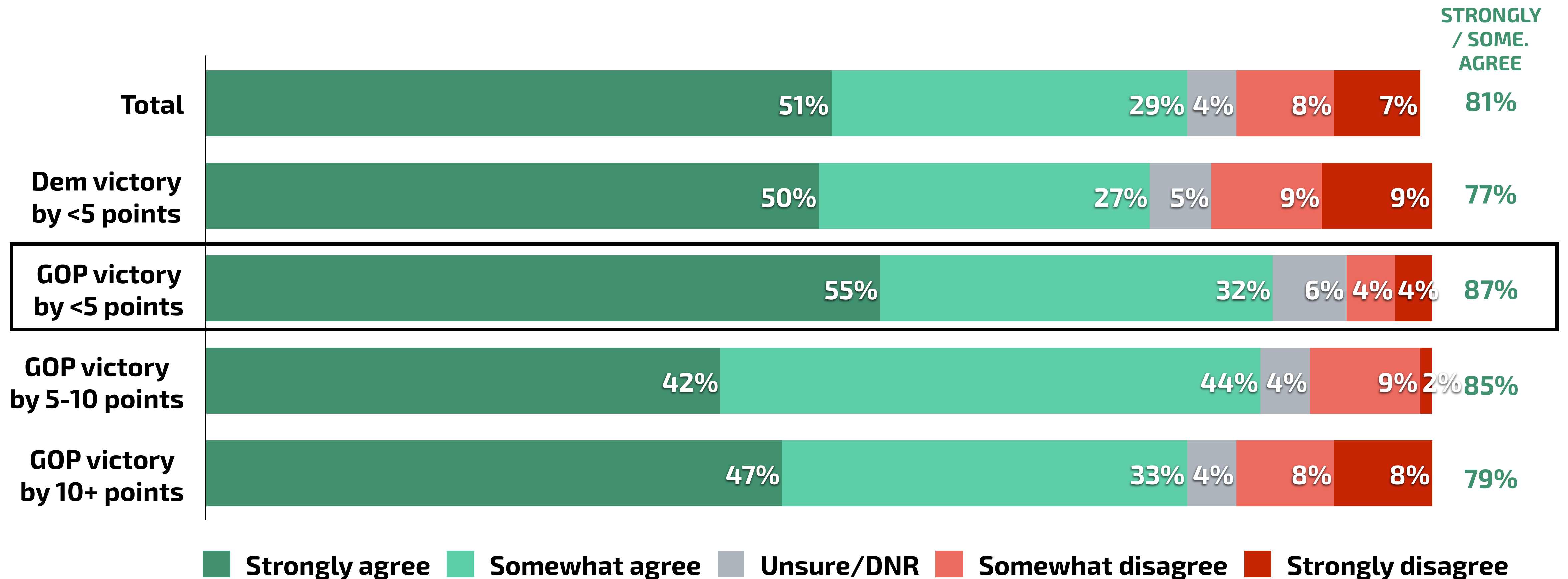


NOTE: Showing 220 districts won by Republicans in 2024. See Appendix A for an inclusive list of the 56 districts highlighted.





# GOP-held battlegrounds are where voters are most adamant that clean energy is an issue Republicans should care about



Q. For each of the following, please tell me if you agree or disagree with the statement. Clean energy is an issue that Republicans in Congress SHOULD care about.

**So what clean energy solutions do voters want their Member of Congress to pursue?**



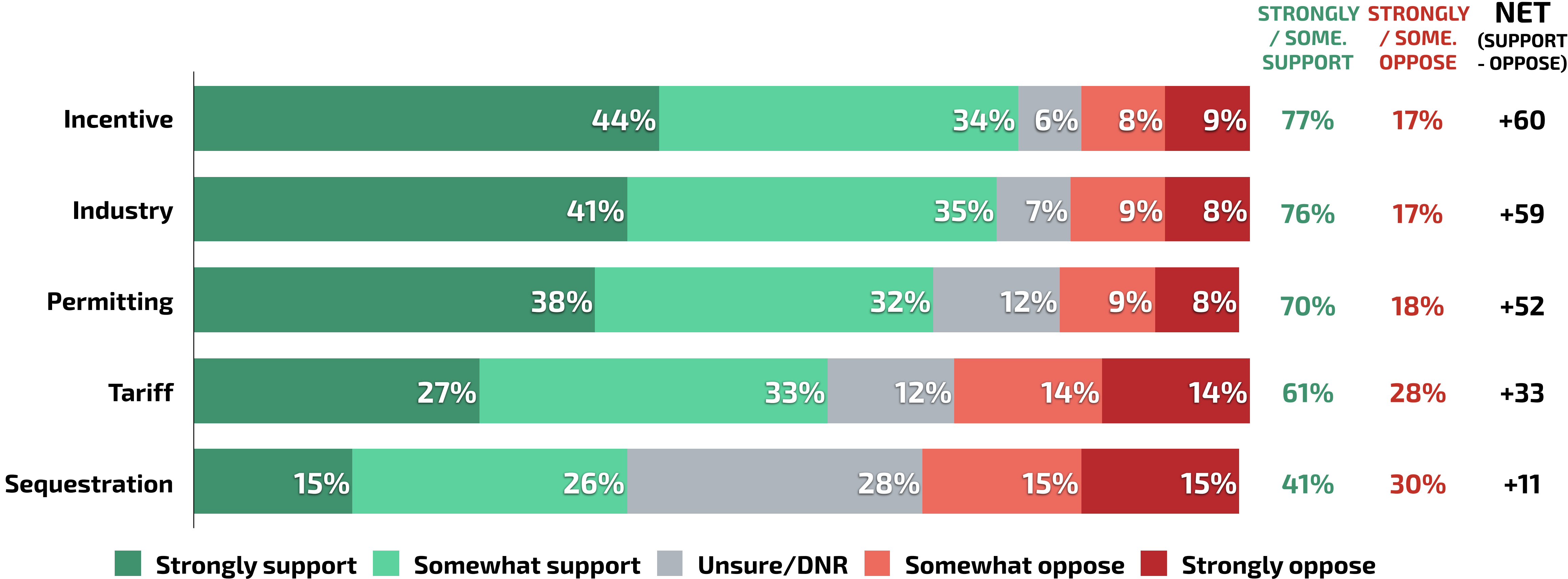
# Voters were asked about their support for five potential clean energy policies

<b>Incentive</b>	“Tax incentives for American companies that develop clean energy technology”
<b>Industry</b>	“Tax incentives for American manufacturers of things like steel and cement who find ways to emit less carbon”
<b>Permitting</b>	“Reforms to fix the lengthy permitting process that slows the building of new clean energy generation”
<b>Tariff</b>	“Tariffs on goods from other countries that are considered “carbon intensive,” meaning their production generated a lot of carbon emissions”
<b>Sequestration</b>	“Promoting underground “carbon sequestration,” a process of capturing carbon dioxide and storing it deep underground”



Q. In general, would you support or oppose Congress implementing the following policies?

# Majorities support most clean energy policies presented, especially tax incentives and permitting reform

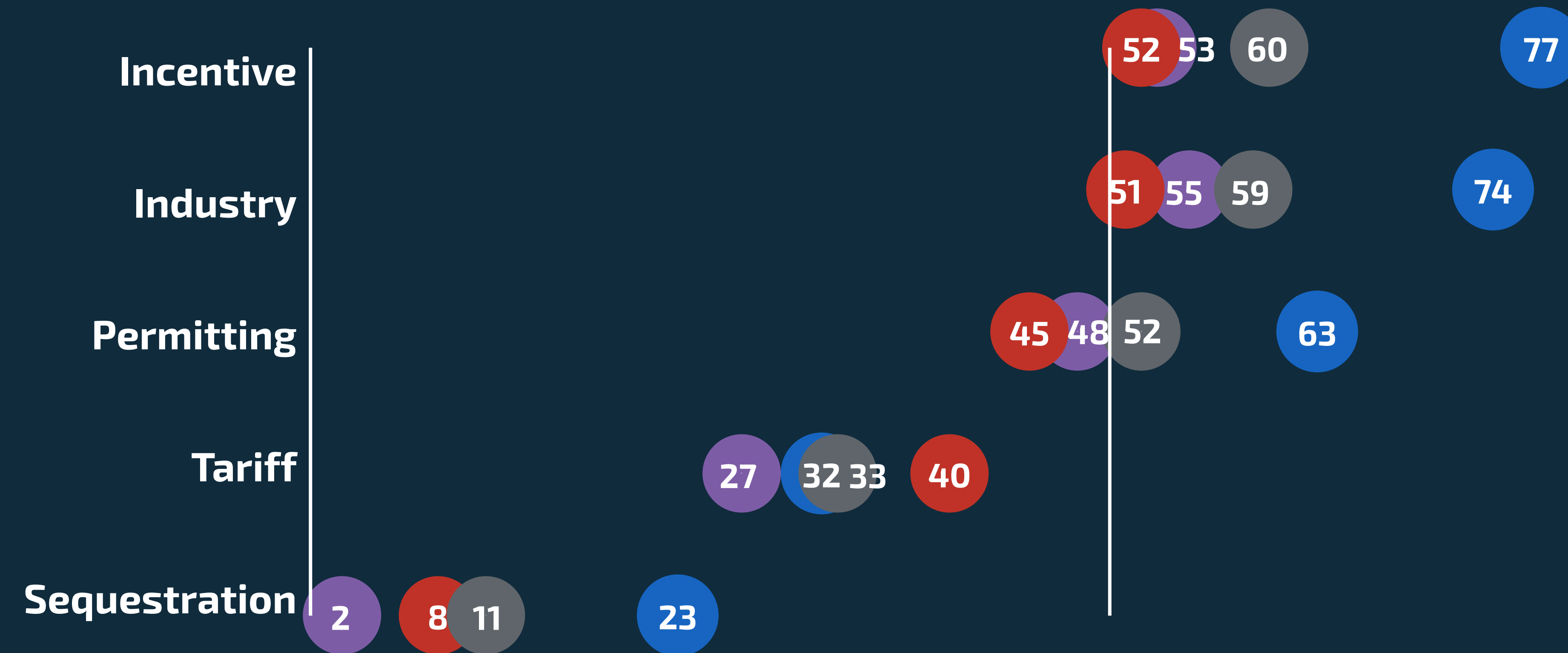


Q. In general, would you support or oppose Congress implementing the following policies?



# Democrats are most supportive of each clean energy policy, except carbon tariffs, which Republicans support at the highest rates

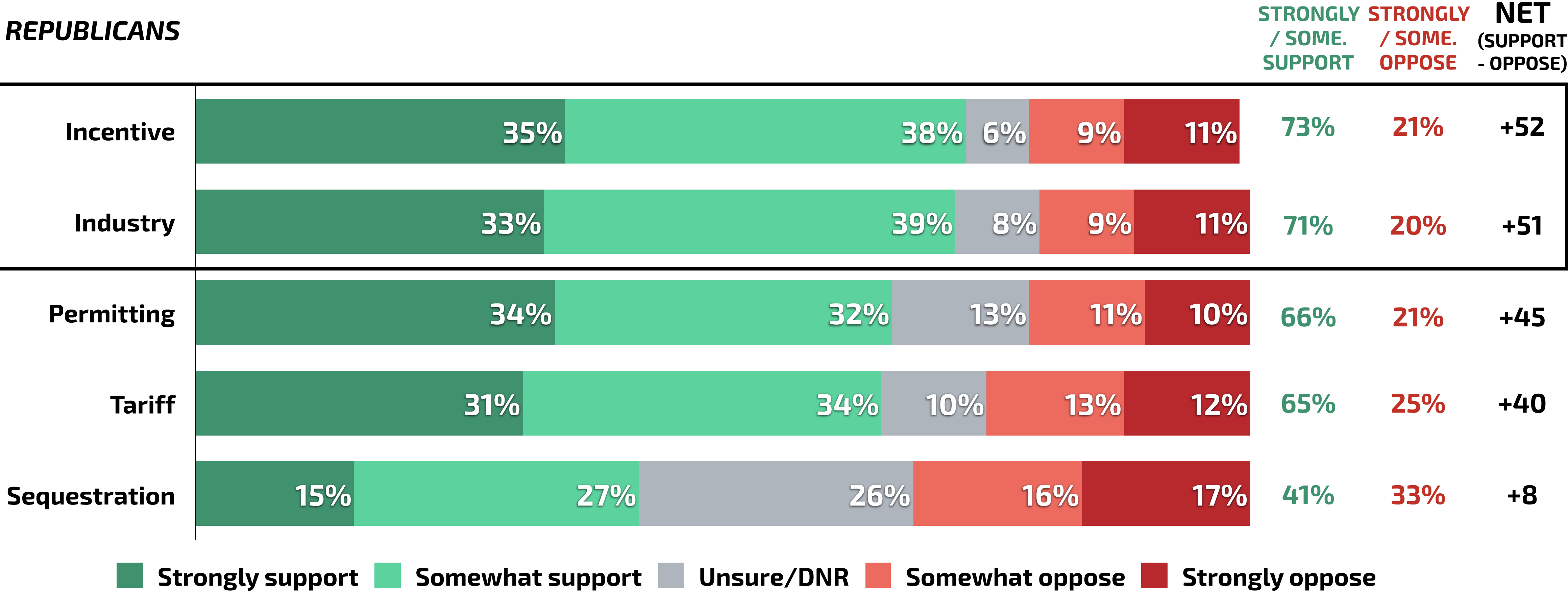
NET (SUPPORT-OPPOSE) ● Total ● GOP ● Ind ● Dem



Q. In general, would you support or oppose Congress implementing the following policies?



# Republicans support all clean energy policies presented, especially tax incentives for clean energy companies and manufacturers who reduce their emissions



Q. In general, would you support or oppose Congress implementing the following policies?  
 Note: Only showing Republicans.



**Voters — and Republican voters in particular  
— believe the U.S. can combat climate  
change without imposing new regulations**





**Climate change is happening and is caused primarily by human activity.**

**54%**

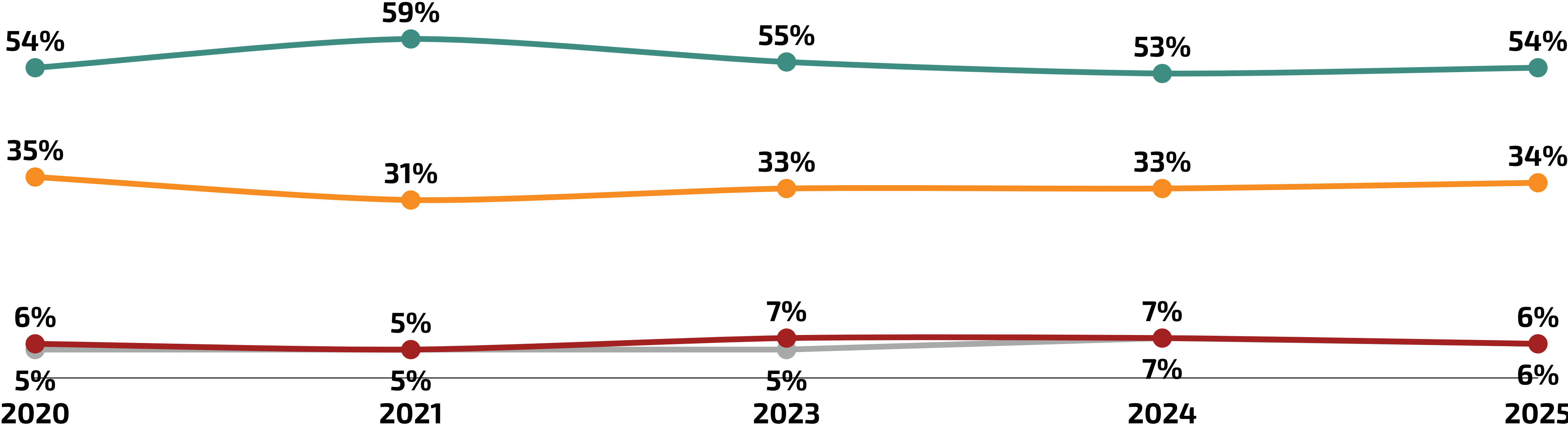
**Climate change is happening and is caused primarily by natural cycles in the Earth's environment.**

**34%**



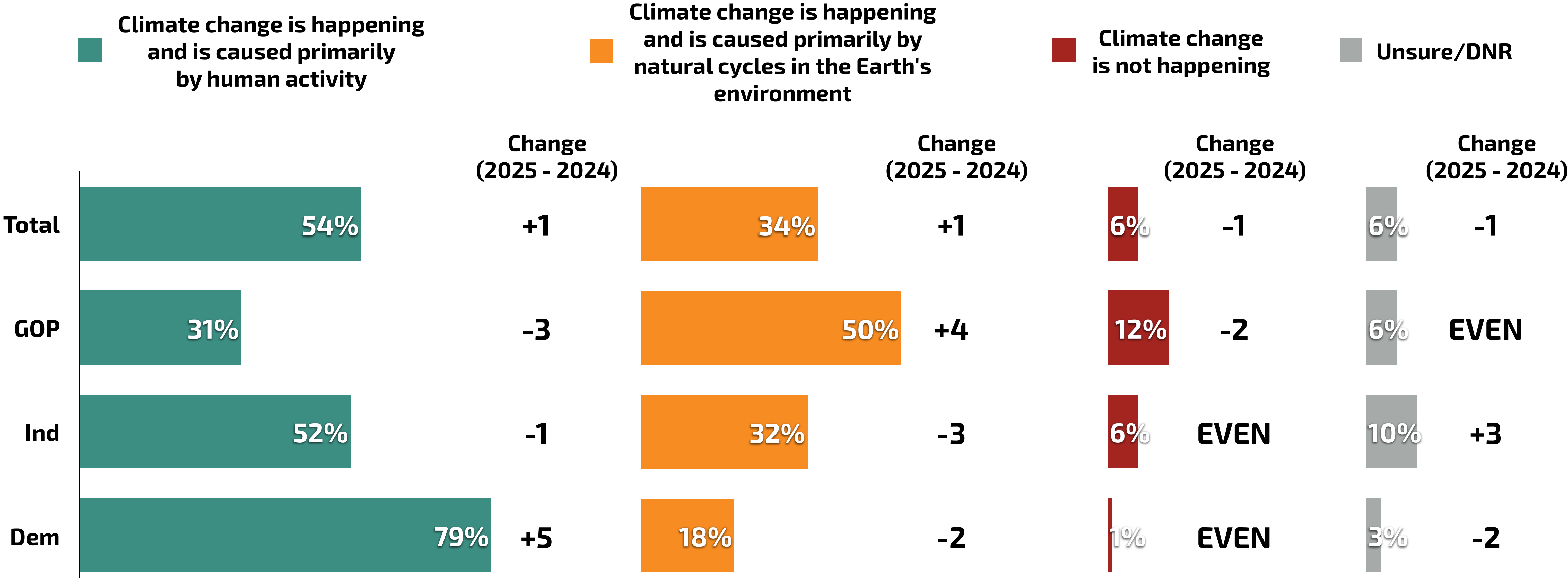
# Most continue to say climate change is happening and is caused by human activity

- Climate change is happening and is caused primarily by human activity
- Climate change is happening and is caused primarily by natural cycles in the Earth's environment
- Climate change is not happening
- Unsure/DNR



Q. Which of the following comes closest to your view?

# Half of Republican voters now think climate change is caused by natural cycles in the Earth's environment

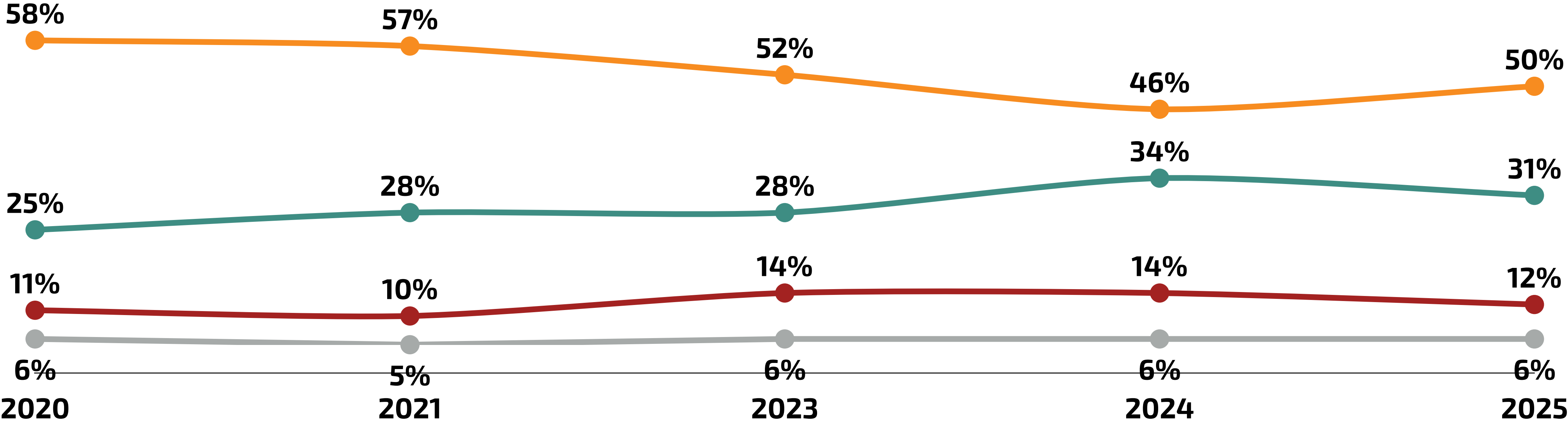


Q. Which of the following comes closest to your view?

# Over the last 5 years there has been a 6 point increase in Republicans saying climate change is primarily caused by human activity

**REPUBLICANS**

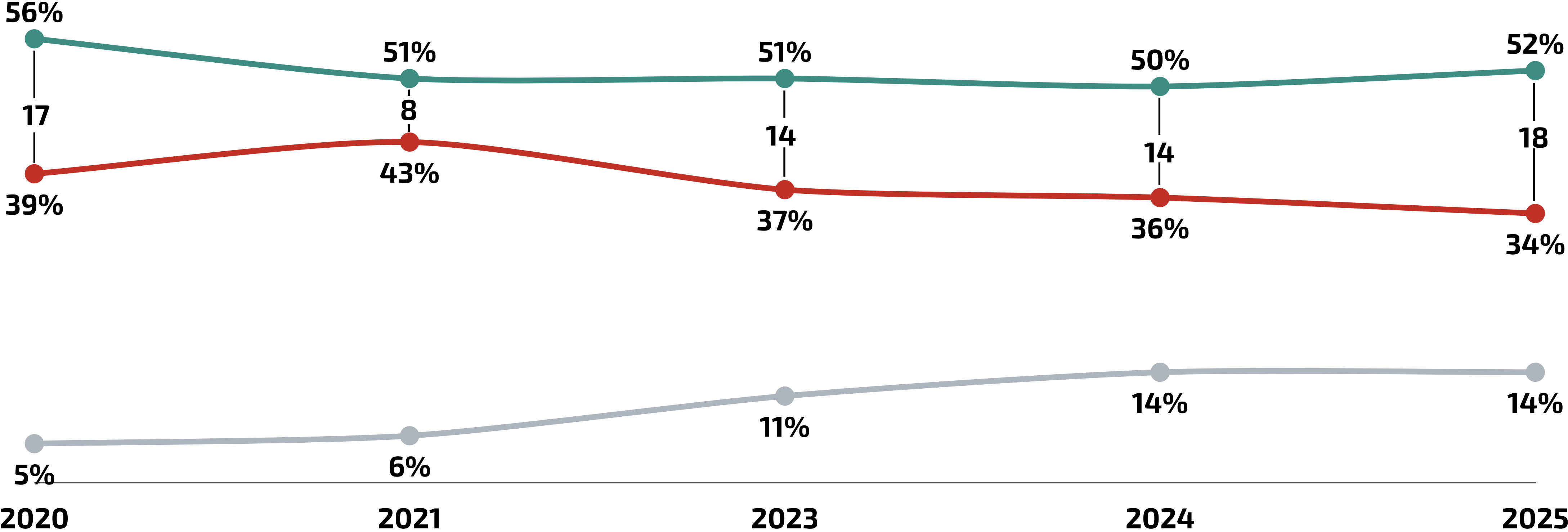
- Climate change is happening and is caused primarily by human activity
- Climate change is happening and is caused primarily by natural cycles in the Earth's environment
- Climate change is not happening
- Unsure/DNR



Q. Which of the following comes closest to your view?  
Note: Only showing Republicans.

# Majorities continue to believe the US can reduce carbon emissions without imposing new regulations and restrictions

● Believe ● Do not believe ● Unsure/DNR

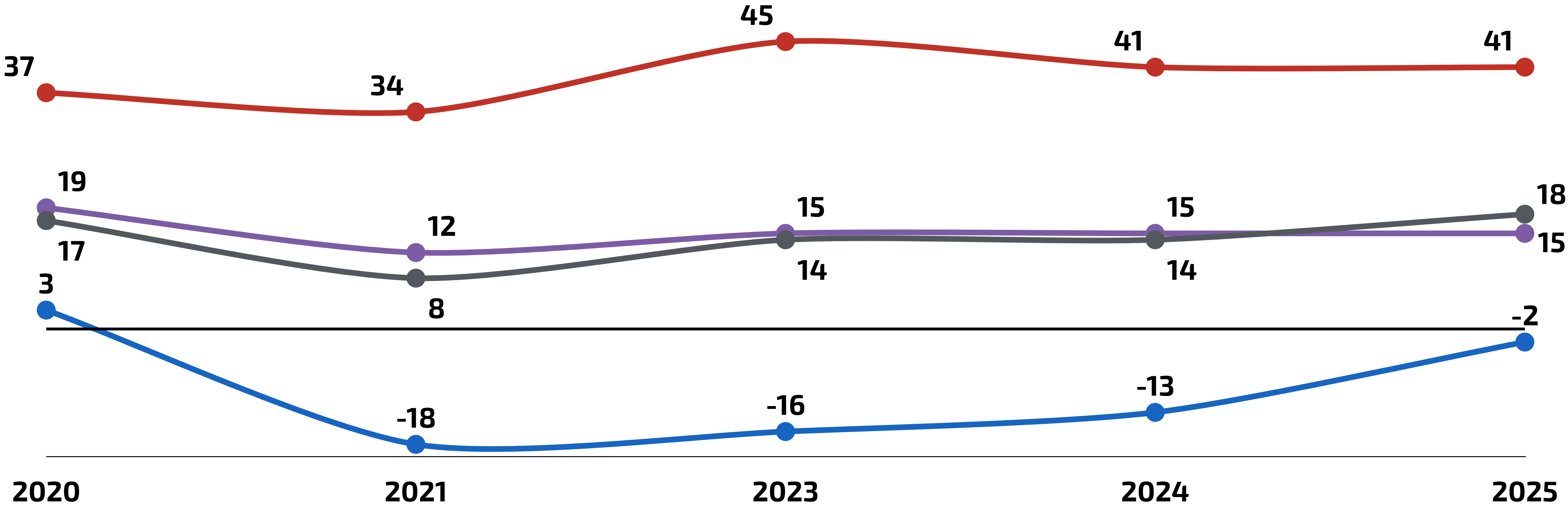


Q. Would you say you generally believe or do not believe the following statement? "We can reduce carbon emissions in the U.S. without having to impose new regulations on people and new restrictions on our economy."

# Democrats don't believe the U.S. can reduce emissions without regulation, but their belief in this possibility has increased by 11 net points since last year

NET (BELIEVE-DO NOT BELIEVE)

● Total ● GOP ● Ind ● Dem



Q. Would you say you generally believe or do not believe the following statement? "We can reduce carbon emissions in the U.S. without having to impose new regulations on people and new restrictions on our economy."



**Rather than more regulation,  
more innovation and better  
technology that lets us reduce  
carbon emissions is the best  
way to fight climate change.**

**vs.**

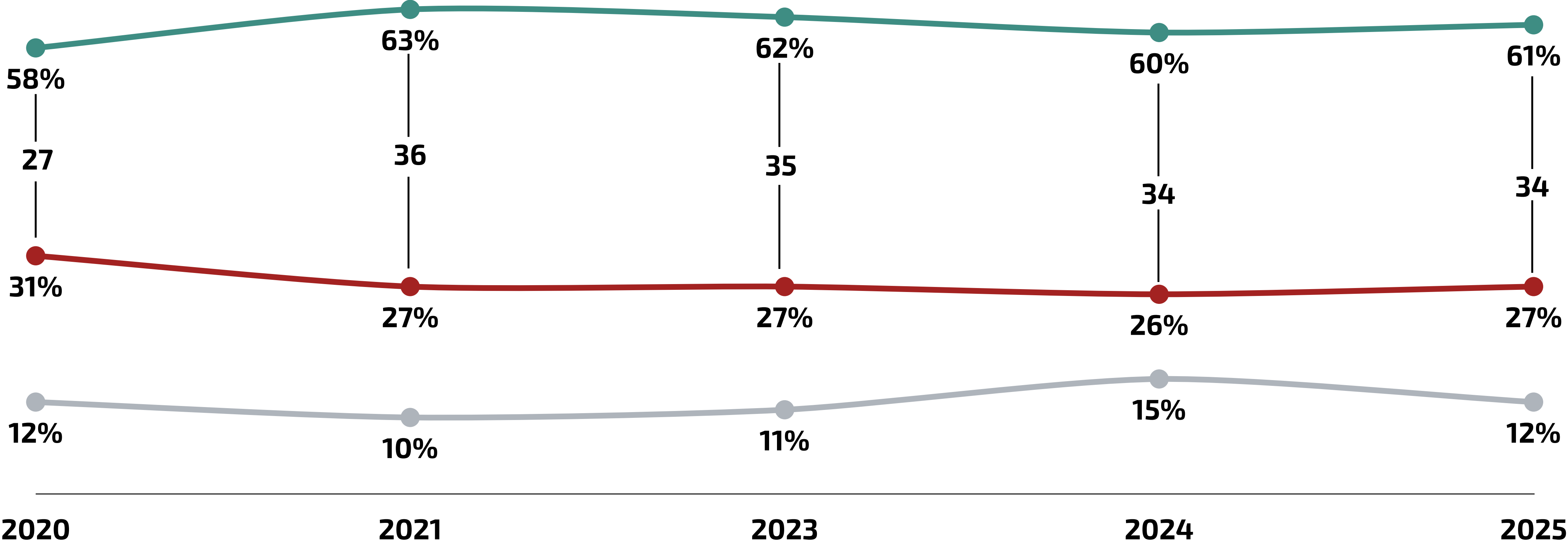
**Stricter regulation on  
carbon emissions is  
the best way to fight  
climate change.**

**61%**

**27%**

# 3-in-5 voters believe we can combat climate change without new regulations

- Rather than more regulation, more innovation and better technology that lets us reduce carbon emissions is the best way to fight climate change
- Unsure/DNR
- Stricter regulation on carbon emissions is the best way to fight climate change

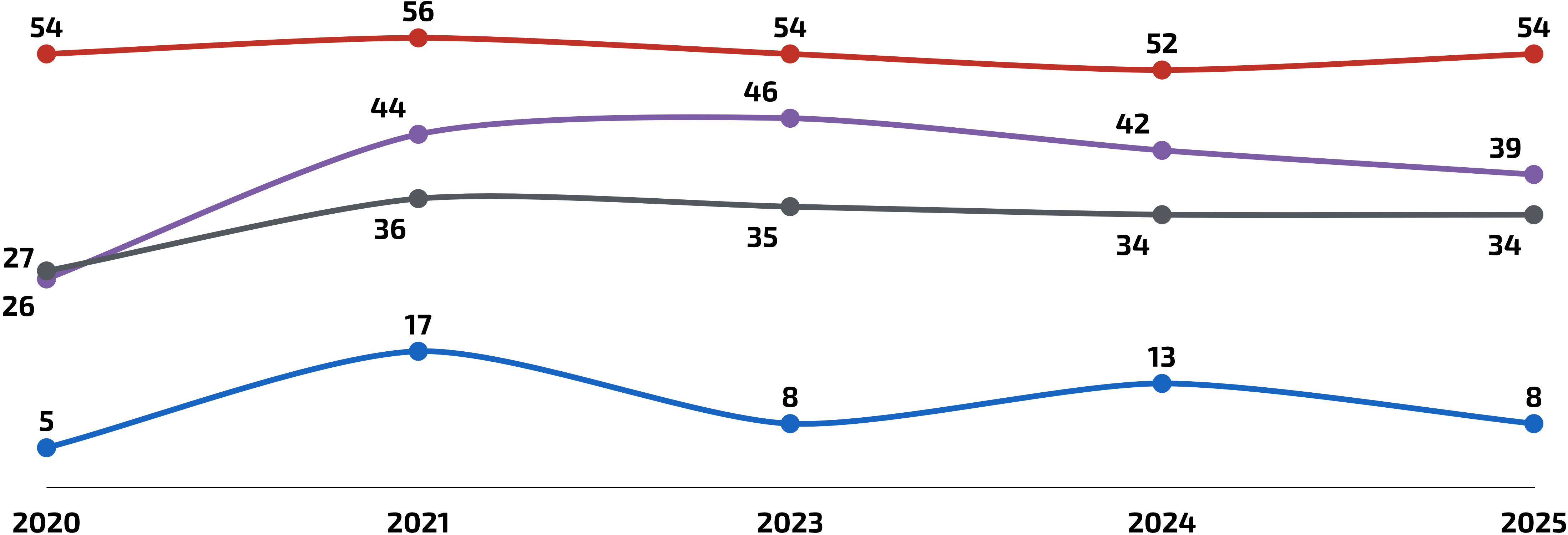


Q. Which of these statements comes closest to your view, even if neither of them is exactly right?

# When innovation and technology are part of the solution, Democrats join Republicans and Independents in choosing it over regulation

NET (INNOVATION-REGULATION)

● Total ● GOP ● Ind ● Dem

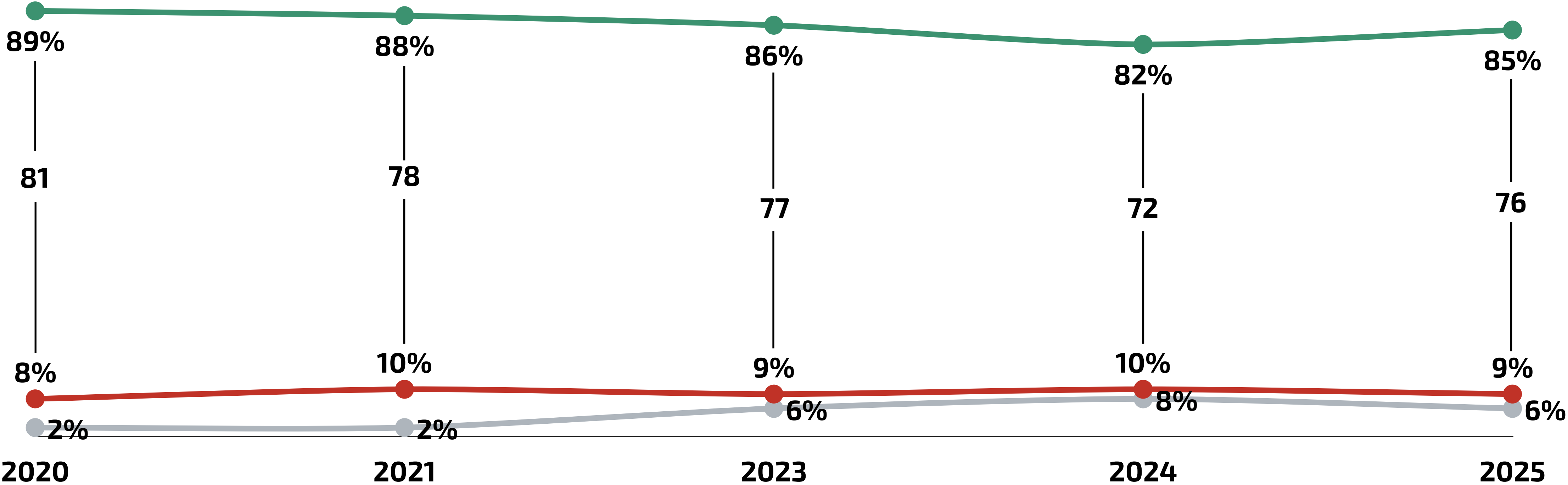


Q. Which of these statements comes closest to your view, even if neither of them is exactly right?  
 Note: "Innovation" refers to the response option "Rather than more regulation, more innovation and better technology that lets us reduce carbon emissions is the best way to fight climate change" and "Regulation" refers to the response option "Stricter regulation on carbon emissions is the best way to fight climate change."



# Overwhelming majority of voters believe the U.S. can develop cleaner energy sources that are also more affordable

● Believe ● Do not believe ● Unsure/DNR

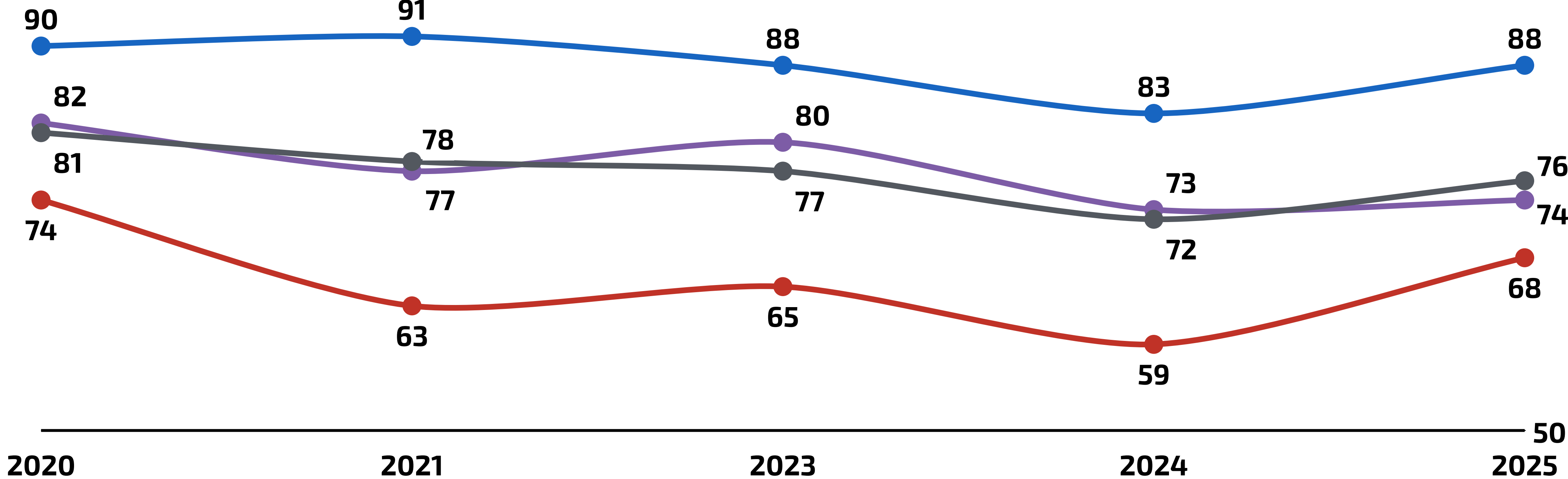


Q. Would you say you generally believe or do not believe the following statement? "It is possible for the U.S. to develop cleaner energy sources that can also provide more affordable energy."

# Across parties, voters believe that clean and affordable energy is achievable, with rates beginning to recover towards pre-pandemic levels

NET (BELIEVE-DO NOT BELIEVE)

● Total ● GOP ● Ind ● Dem

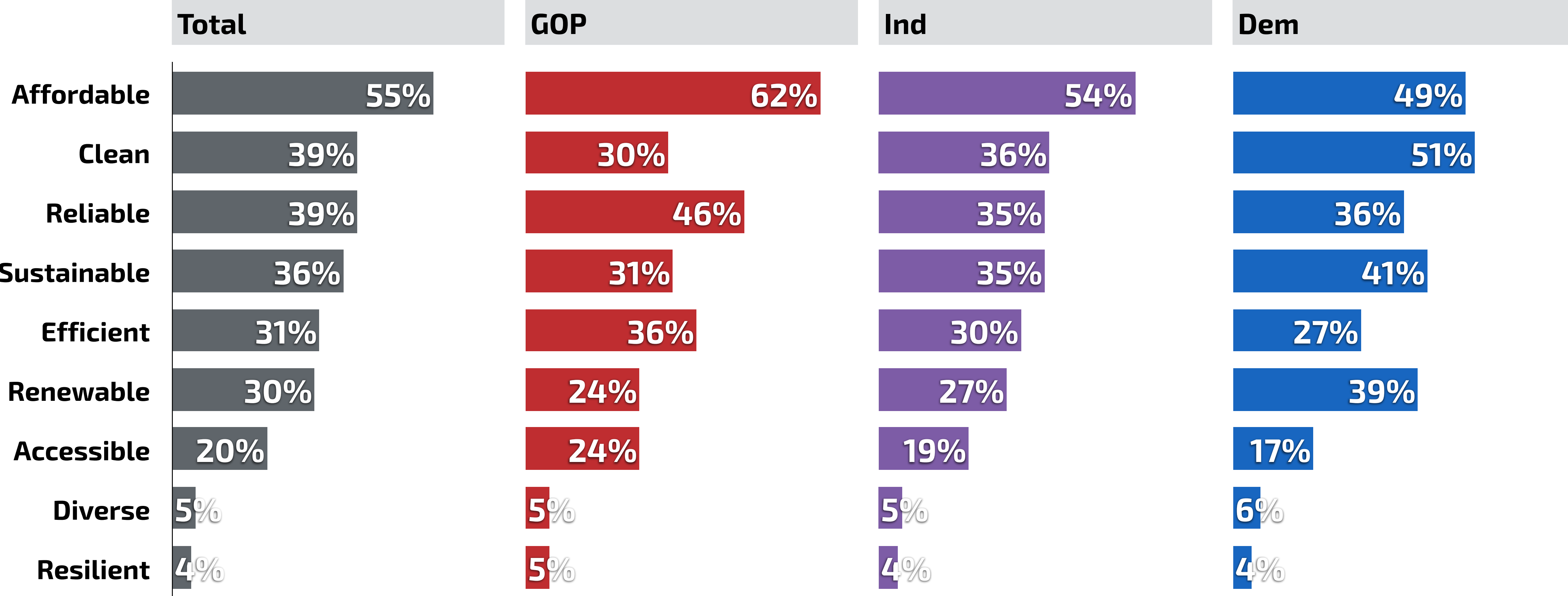


Q. Would you say you generally believe or do not believe the following statement? "It is possible for the U.S. to develop cleaner energy sources that can also provide more affordable energy."

**How should I talk about energy?**

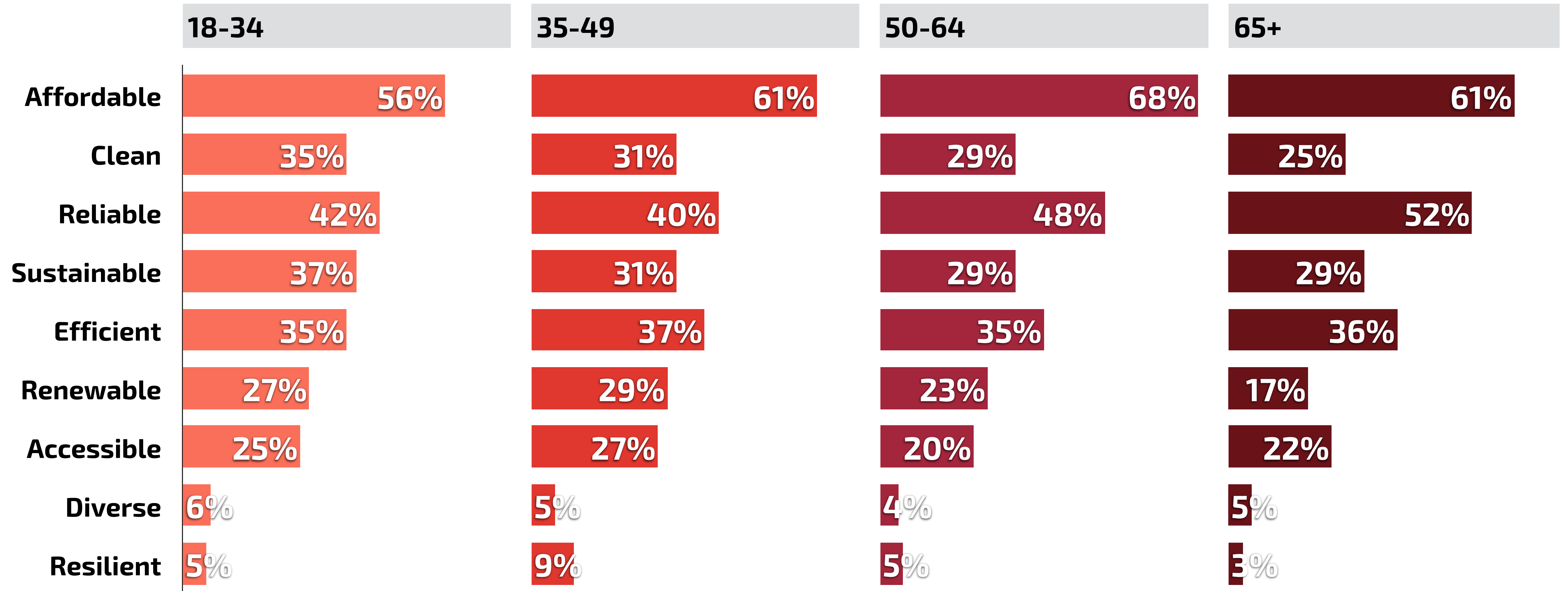


# Affordable energy is a key priority; Republicans also seek reliable and efficient energy



Q. Which do you believe are most important when it comes to energy? Select up to three.  
 Note: Not showing "Something else (Please specify)" or "None of the above" which received 3% or less.

# Republicans across all ages see “affordable” as most important; those 65+ see “reliable” as more important than their younger counterparts



Q. Which do you believe are most important when it comes to energy? Select up to three.  
 Note: Only showing Republicans. Not showing “Something else (Please specify)” or “None of the above” which received 5% or less.

# Appendices



# Appendix A

McDowell (NC-6)	-40	Moore (NC-14)	-39	De La Cruz (TX-15)	-37	Evans (CO-8)	-37	Mackenzie (PA-7)	-37	Valadao (CA-22)	-37	McCormick (GA-7)	-36	Bresnahan (PA-8)	-36	Lawler (NY-17)	-36
Knott (NC-13)	-36	Hudson (NC-9)	-36	Gonzales (TX-23)	-36	Steil (WI-1)	-36	Fitzpatrick (PA-1)	-35	Van Orden (WI-3)	-35	Rouzer (NC-7)	-35	Finstad (MN-1)	-35	Stauber (MN-8)	-35
Malliotakis (NY-11)	-35	Emmer (MN-6)	-35	Edwards (NC-11)	-35	Wied (WI-8)	-34	Grothman (WI-6)	-34	Fitzgerald (WI-5)	-34	Wagner (MO-2)	-34	Tiffany (WI-7)	-34	Lee (FL-15)	-34
James (MI-10)	-34	Ciscomani (AZ-6)	-34	Barrett (MI-7)	-34	Fischbach (MN-7)	-34	Zinke (MT-1)	-33	Perry (PA-10)	-33	Kiggans (VA-2)	-33	Hurd (CO-3)	-33	McGuire (VA-5)	-33
Giménez (FL-28)	-33	Mills (FL-7)	-33	Salazar (FL-27)	-33	Beab (FL-4)	-32	Crank (CO-5)	-32	Baumgartner (WA-5)	-32	Wittman (VA-1)	-32	Downing (MT-2)	-32	Kean (NJ-7)	-32
Huizenga (MI-4)	-32	Oberholte (CA-23)	-32	Kim (CA-40)	-32	Schweikert (AZ-1)	-32	Calvert (CA-41)	-32	Newhouse (WA-4)	-32	Van Drew (NJ-2)	-32	Luna (FL-13)	-32	Dunn (FL-2)	-32
Crane (AZ-2)	-31	Hamadeh (AZ-8)	-31														



Table displaying the difference between the percentage of voters saying Republicans in Congress DO care about clean energy and the percentage of voters in each district estimated to say Republicans in Congress SHOULD care about clean energy in the 56 Republican districts with “should care” above the Republican median and “do care” below the Republican median.

# Methodology

**THE SURVEY:** 4,029 registered voters nationwide were surveyed from January 7-16, 2025, with 50% of respondents sampled via online panels and matched to the voter file, 19% of respondents sampled via landline live caller and matched to the voter file, and 31% of respondents sampled via cell live caller and matched to the voter file.

The sample was weighted to population benchmarks for registered voters nationwide on gender, age, race/ethnicity, education, region, 2024 U.S. House vote, and 2024 presidential vote. Estimates for gender, age, and region were derived from the L2 voter file. Estimates for race/ethnicity and education were derived from the US Census Bureau's American Community Survey demographic data adjusted to match voter registration estimates from the November 2020 Current Population Survey Voting and Registration Supplement.

The margin of error, calculated the way it would be for a random sample and adjusted to incorporate the effect of weighting, is +/-1.7 percentage points.

**THE MODEL:** Mixed effect multi-level models were used to estimate the likelihood of agreement/favorability based on collected survey responses matched to registered voter data. The probabilities were then aggregated to summarize opinion at the congressional district level.







ECHELON  
INSIGHTS

