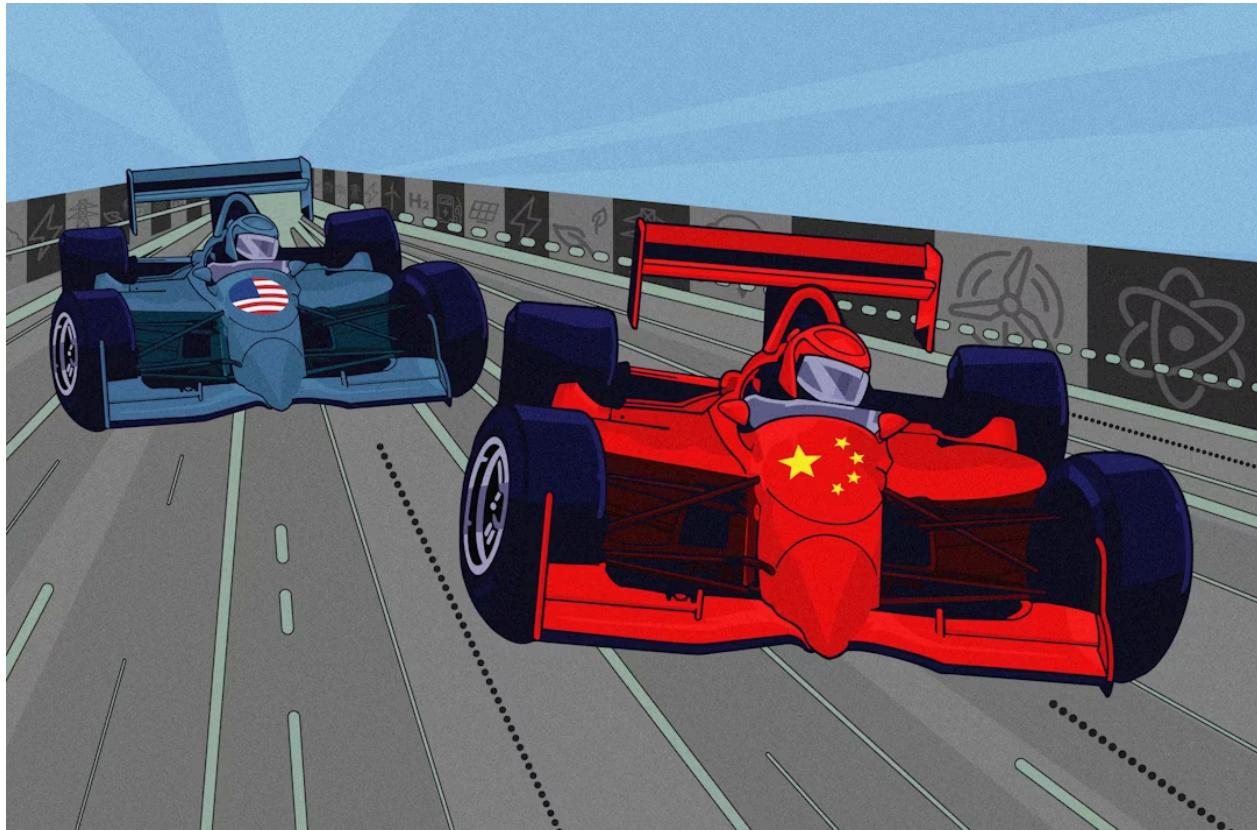


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Shifting into High Gear: America's Changing Attitudes Toward Competition with China and Clean Energy



Mary Sagatelova, Senior Advocacy Advisor, Emily Becker, Deputy Director of Communications for the Climate & Energy Program

Takeaways

- Hostility toward China has cooled in recent years. Most Americans are now more likely to view the country as a competitor (42%) than an outright enemy (29%).
- Americans are deeply concerned by China's growing dominance in global supply chains, particularly energy. They want to compete and challenge China for the top spot in global markets.
- Democrats have an opportunity to gain voters' trust on this issue, but only if they can prove they're putting America first. That means showing Americans how they're protecting US industries and prioritizing our interests in global relationships.

China's rapid electrification of its economy and growing lead in clean energy manufacturing and deployment have led some to call the country the world's first "electrostate." Whatever the label, the reality is clear: China dominates clean energy manufacturing, possesses enormous technical knowledge, and has a stranglehold on access to strategic critical mineral reserves and processing. They've massively outpaced the United States in key industries that will define the economies of the future, from battery manufacturing to next-generation nuclear power.

While the Chinese government charges ahead, America has chosen to fall behind. Republicans in Congress voted to decimate support for clean energy manufacturing and deployment, and prominent conservatives continue to spread unsubstantiated conspiracy theories about the geopolitical, economic, and environmental impacts of clean energy.

The United States is at a strategic crossroads: Should we compete or continue to capitulate? Our research proves Americans have a clear preference.

In 2023, Third Way polling showed that American voters viewed China as an existential threat to the US's global standing. Since then, things have changed. Our 2025 polling shows that Americans' attitudes towards China have softened, from viewing the country as an *enemy* to viewing it as a *competitor*. Americans are now more likely to see China as a rival player in the global economy than as an adversary on a battlefield.

Our survey shows that Americans want to see policymakers secure concrete benefits *for the US* rather than simply trying to "beat China". Rewards for American workers and families—from new

jobs in emerging sectors here at home to greater US influence around the world—must be at the heart of US-China policy and political communications.

Below, we'll explore America's complex and changing relationship with China, consider its impact on clean energy deployment in the US, and highlight strong messages on the importance of clean energy to combating China's growing influence.

Our recommendations use key findings from our recent work with Impact Research, which surveyed 800 registered voters nationwide, with an oversample of 200 East Asian American voters.

From Confrontation to Cooperation?

Our [2023 polling](#) was conducted on the heels of the COVID-19 pandemic. Amid heightened tensions between the US and China, Americans expressed greater hostility toward China than they do today. Respondents did not call for war or violence, but they were enthusiastic about aggressive economic confrontation that would weaken China, without emphasizing benefits for the US. They expressed little interest in mutually beneficial dealmaking. At the time, just 32% of respondents thought the US should seek economic cooperation or consensus with China. Over a third of participants described China as America's enemy.

Today, the share of Americans who describe China as an enemy has declined by 7 points, from 36% in 2023 to 29% and the share seeing China as an ally or trade partner has increased by 8 points. As a result, **Americans now have different policy preferences, favoring strategies that encourage the US to find areas of alignment with China instead of 'standing up' to the country.** 52% of respondents to the 2025 survey chose cooperation over combat vs 32% in 2023—a 20-point swing.

Americans Favor Cooperation Over Standing Up to China



Source: Third Way and Impact Research conducted a poll of 800 registered voters nationwide, plus an oversample of 200 East Asian Americans voters, with a margin of error of +/- 3.5%, from May 1-8, 2025. Third Way and Impact Research conducted polling via professional telephone interviews and a text-to-web survey of 800 likely 2024 general election voters, with an oversample of 200 East Asian American voters, from July 13-19, 2023. The margin of error for the main sample is +/- 3.5 percentage points at the 95% confidence level.



The 2023 survey showed 82% of Americans, including 57% of East Asian Americans, saw China as the biggest threat to America's economy. Participants rejected *every single scenario* our survey presented, suggesting cooperation between US and Chinese companies, including:

- US companies using Chinese components to build clean energy infrastructure in the US, like wind and solar projects.
- Chinese firms opening manufacturing plants in the US, staffed by US workers.
- The US government using federal funding to incentivize Chinese factories to open in the US.

When asked to explain their concerns about China, the plurality of Americans cited our growing economic dependence on the country, followed closely by the national security risks posed by the Chinese government. The behaviors that prompted Americans' concerns in 2023—from market dumping to intellectual property theft—have not dissipated. But Americans' desired response to those behaviors has shifted—from outright hostility to beating China at its own game.

Explaining the Shift: Trade and Tariffs

Americans aren't softening on China because they hold the country and its leaders in high regard. But they have become more aware of the role China plays in their daily lives and, as a result, have become more hesitant to use blunt force. Americans still view China as the greatest risk to our national (42%) and economic security (66%), albeit by a smaller margin than in 2023 (64% and 82%, respectively).

Respondents also worried about China's growing command of global markets, including their dominance in clean energy manufacturing and deployment. When presented with statistics on China's ongoing global clean energy investment strategy, a majority of Americans from both parties expressed deep concerns about the implications for global geopolitics. Americans know that China poses a threat to our country's peace and prosperity, and they won't just let them get away with it.

At the same time, respondents clearly understood that China's growing power means that Chinese exports are part of their daily lives. The majority of Americans (62%) think that at least half of what they own was made in China.

By a 40-point margin, voters would rather the US make trade agreements with China than implement tariffs and broad restrictions on trade, provided those agreements prioritize benefits for US citizens and protect American intellectual property. Less than half of respondents (45%) like the idea of tariffs—and that number drops even further (38%) when asked specifically about the extreme tariffs President Trump proposed on China. Americans are not warming up to China—they worry that overly aggressive action against the country will raise prices for them and their families.

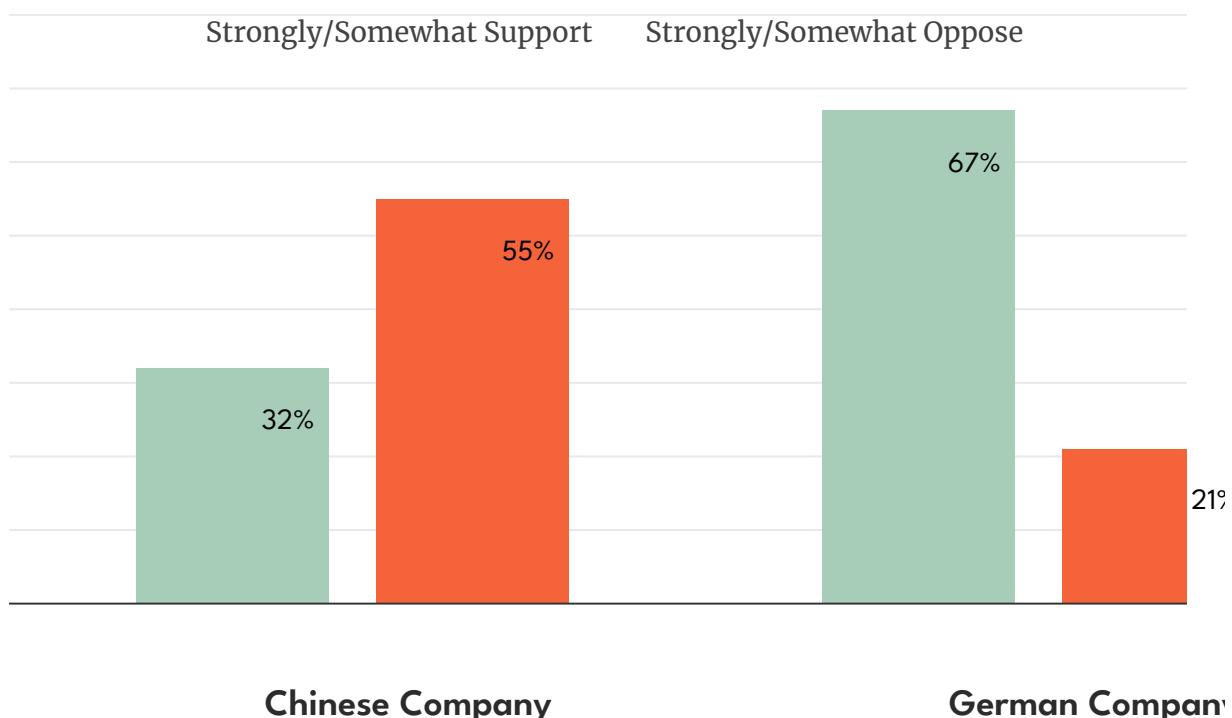
Competition—and Caution

Americans see trade between the US and China as disproportionately benefiting China, and the plurality of respondents (39%) hope to see more balanced trade between the US and China in the coming years. But as we note above, their openness is not unlimited. Just as in the 2023 survey, a strong majority of 2025 participants are deeply uncomfortable with the idea of a Chinese company purchasing an American company, even if acquisition by a Chinese firm prevented the closure of the factory and preserved local jobs. East Asian Americans also oppose Chinese ownership by a 10-point margin.

Most Americans would rather see a local factory close than have a Chinese company buy it.

Americans Would Rather a Factory Close Than be Acquired by a Chinese Firm

If a factory in your area was struggling to stay open, but either a Chinese or German company offered to buy it and help keep it open, would you support or oppose the company buying the factory?



Source: Third Way and Impact Research conducted a poll of 800 registered voters nationwide, plus an oversample of 200 East Asian Americans voters, with a margin of error of +/- 3.5%, from May 1-8, 2025.



Perhaps unsurprisingly, respondents feel differently about an ally like Germany purchasing the same factory. A majority (67%) supported the theoretical German acquisition. Though Americans may be more willing to cut deals with China than they were two years ago, they remain skeptical of the country's intentions.

83% of survey participants ranked protecting against Chinese cyber attacks as extremely or very important to them. Americans want to compete and identify opportunities for collaboration, but they're clear-eyed about the associated risks. They also want to make sure the US reaps serious economic benefits.

When it comes to *any* collaboration with a Chinese company, the plurality of Americans agree that our top priority should be ensuring that more jobs and revenue stay in the US than go to China.

Their second-highest priority is setting clear rules to prevent intellectual property theft from US companies.

Importantly, Americans' priorities are not punitive towards China. Their focus is instead on elevating America and creating opportunities at home.

Therefore, policy and communications on China must stress the benefits for Americans and emphasize the tangible precautions being taken by the US government to protect American businesses, intellectual property, and opportunities for workers here at home.

Doing Business with China? Americans Prioritize US Jobs

If an American company were to collaborate with a Chinese company, which of the following should be the TOP priority for reducing risk and ensuring the partnership benefits the United States?

Ensuring that more of the jobs and revenues created are in the US rather than in China	26%
Making companies create clear rules for who owns new technology so China cannot steal our intellectual property	24%
Requiring companies to be transparent about where their materials come from to ensure that they were not made with forced labor in China	22%
Ensuring the American companies gain control of Chinese technical knowledge to advance US technologies and reduce future	15%

Trusted Messengers and Messages

Americans are evenly split on which party they trust more to manage the US–China relationship. 11% of voters, including 26% of independents, said they don't trust either party. Among those who do have a party preference, Independents trust Democrats more than Republicans by 5 points.

Voters who approve of the Democratic side cite the party's rational and diplomatic approach to foreign policy and contrast it with Republicans' perceived extremism and chaos. Voters want a pragmatic approach, and they increasingly believe Democrats can give them what they're looking for in a way Republicans can't. But Democrats need to maintain and grow that momentum.

At the same time, the foundation for Republicans' credibility on China is weakening. Fewer voters, compared to 2023, now say they trust Republicans because they're tough or focused on putting America first. This drop signals a strategic opening for Democrats to own this issue.

At the same time, the foundation for Republicans' credibility on China is weakening. Fewer voters, compared to 2023, see Republicans as tough, competent, or focused on putting America first. This drop signals a strategic opening for Democrats to forcefully message on this issue.

We tested a range of arguments for why the US should prioritize building clean energy in order to compete with China. The most effective messages focused on reducing reliance on vulnerable global supply chains and grouped China with other volatile global actors.

“By investing in clean energy, we can produce American energy without being forced to rely on vulnerable global supply chains and Chinese, Middle Eastern, or Russian dictators who play politics with oil production and prices. We need to make more energy in our country to control our own destiny.”

Voters are also drawn to messaging on holding China accountable for its greenhouse gas emissions. Importantly, this message wasn't just about addressing climate change for the sake of environmental protection but instead emphasized fairness and global competition, two effective themes in the most impactful pro-clean energy messaging.

“Climate change is a global problem and to combat it, we need countries all over the world investing to help us transition off fossil fuels. That means the US needs to do our part to build clean energy technology in addition to other countries like China, so we generate as much clean energy as possible worldwide.”

Other successful messages highlighted rising electricity demand and the fact that the US has invented many clean energy technologies but is failing to manufacture them at home.

“Demand for electricity is rising at a record pace in the US. We need to use all the energy resources at our disposal, including clean energy. But if we don't invest in US clean energy manufacturing, we'll need to import Chinese-made technologies to meet our growing needs. That's why the

US must invest in domestic clean energy manufacturing as soon as possible."

Messaging highlighting China's 'dominance' or noting that China is 'already winning' was less compelling to respondents, perhaps because they found it unmotivating and non-specific. They wanted to hear how America could benefit from competition, not simply that the country should compete to prevent others from surpassing America's economy or global influence.

The purpose of these messages is not to increase support for clean energy, which is already quite high (72% of Americans believe the US should build more clean technologies here at home). Instead, advocates must *strengthen* existing support and inoculate it against attacks. Clean energy buildup and climate change are low-priority issues for most Americans and are easily displaced by other concerns. For a durable energy transition, Americans need to understand that clean energy grows America's future security and prosperity.

Ultimately, the most effective way to reinforce support for clean technologies isn't through clever messages but through clear information. We saw the greatest change in support for competition with China after respondents were presented with neutral information on the scale of China's subsidies, tax incentives, and industrial support for clean energy manufacturing and deployment.

The messages we tested helped reduce defeatism and discouraged those who had previously said they were ready to concede to China. But presenting Americans with clear-cut, non-partisan data on China's investments in the energy sector helped more Americans understand that this is a fight worth having. It cut through the partisan noise or the previous messaging they'd seen on clean energy and showed that China really *had* put more effort into clean energy leadership than the United States had. That evidence sparked respondents' competitive impulse. If China can do it, so can the US.

Conclusion

While Americans still consider China to be a serious threat, they are far more likely to see the country as an economic rival, not a faceless villain. They understand America must outpace China and that often includes selective economic engagement and cooperation when it's in America's interest. Clean energy advocates must capitalize on this more nuanced perspective and help Americans grasp the importance of clean energy manufacturing and deployment to grow our influence and dominance on the global stage.

Methodology

From May 1-8, 2025, Third Way and Impact Research conducted polling via live professional telephone interviews and a text-to-web platform of 800 registered voters nationwide, plus an oversample of 200 East Asian American voters, with a margin of error of +/- 3.5% at a 95% confidence interval. The margin of error for subgroups varies and is higher.

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