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CANVASS

The Canvass 2025: Year in Review

A year-end review of key findings and insights from the 2025 The Canvass Capitol Hill and K Street surveys on the true issues driving Washington

Presented by Punchbowl News & LSG

Methodology



The Canvass Capitol Hill & K Street Surveys

- **The Canvass Capitol Hill:** Survey of Capitol Hill chiefs of staff, legislative directors, communications directors, press secretaries, and staff directors conducted online by LSG in February, April, June, September, and November 2025
- **The Canvass K Street:** Survey of senior K Street leaders from across the corporate, lobbying, trade association, non-profit, and think tank industries conducted online by LSG in January, March, May, July, and October 2025
- **The Canvass Inauguration Special Edition:** Survey of senior K Street leaders and Capitol Hill senior staff conducted online by LSG in January

Summary of Key Findings

1 Economic anxiety has **DIMINISHED** Trump's control of Washington.

2 The shutdown came as no surprise, but **NEITHER party** won the messaging war.

3 California Governor Gavin **NEWSOM** has emerged as the leader of the Democratic resistance during Trump's second term.

4 Democrats have midterm momentum, but a **SPLIT** Congress is expected after the 2026 midterm elections.



A photograph of Donald Trump on a stage, clapping his hands. He is wearing a dark suit and a yellow tie. The background is a large, dense crowd of people, many of whom are wearing red hats. The entire image has a purple tint. The text "Economic Anxiety Has Diminished Trump's Control of Washington" is overlaid on the right side of the image in a purple font.

Economic Anxiety Has Diminished Trump's Control of Washington

In January, both K St. and Capitol Hill were **CONCERNED** about the Trump Administration's plans to impose a host of new tariffs

How concerned or unconcerned are the clients or industries you represent, work with, or conduct research for about the incoming Trump administration's plan to impose a host of new tariffs? (K STREET ONLY)

THE CANVASS 2025	CONCERNED (NET)	NEITHER/I DON'T KNOW	UNCONCERNED (NET)
January Special Edition	81%	9%	10%
March K Street	86%	5%	9%
May K Street	85%	6%	9%

How concerned or unconcerned is the member of Congress you work for about the incoming Trump administration's plan to impose a host of new tariffs? (CAPITOL HILL ONLY)

THE CANVASS 2025	CONCERNED (NET)	NEITHER/I DON'T KNOW	UNCONCERNED (NET)
January Special Edition	67%	18%	15%
February Capitol Hill	71%	8%	21%
April Capitol Hill	71%	8%	21%



Most also believed Trump's mass deportation plans would HARM the economy, including a plurality of Republicans

Do you believe Donald Trump's mass deportation plans will help or harm the economy?



JANUARY SPECIAL EDITION	TOTAL	CAP HILL	K STREET	DEM	GOP
HELP (NET)	13%	16%	12%	1%	26%
NEITHER/I DON'T KNOW	17%	21%	16%	3%	33%
HARM (NET)	70%	64%	72%	97%	42%

In April, a majority of senior staffers reported their member **OPPOSED** the Trump administration implementing new tariffs on most countries

Does the member of Congress you work for support or oppose the Trump administration implementing new tariffs on countries across the world?

CAPITOL HILL APRIL	TOTAL	DEM	GOP
SUPPORT (NET)	21%	0%	42%
NEITHER/I DON'T KNOW	8%	0%	16%
OPPOSE (NET)	71%	100%	42%



Most believed Trumps EO's on tariffs would HARM Republicans in the November 2026 midterm elections

Do you believe President Trump's executive orders on each of the following issues will help or harm Republicans in the November 2026 midterm elections? (HARM)

CANVASS 2025	TARIFFS (HARM)
K Street March	81%
Capitol Hill April	87%



In addition, Canvass respondents in both parties believe Trump’s approach to tariffs and inflation have been **INEFFECTIVE**

How effective or ineffective do you believe President Trump’s **approach to tariffs** has been so far?

TARIFFS	CAPITOL HILL SEPT.	K STREET OCT.
EFFECTIVE (NET)	22%	22%
NEITHER / I DON’T KNOW	5%	9%
INEFFECTIVE (NET)	73%	69%

How effective or ineffective do you believe President Trump’s **approach to addressing inflation** has been so far?

INFLATION – K ST. OCT.	TOTAL	DEM	GOP
EFFECTIVE (NET)	11%	0%	23%
NEITHER/I DON’T KNOW	10%	3%	17%
INEFFECTIVE (NET)	79%	98%	59%

Do you believe President Trump has taken sufficient action to **address inflation**?

INFLATION – CAP HILL SEPT.	TOTAL	DEM	GOP
No	77%	98%	58%
Yes	17%	0%	33%
I don’t know	5%	2%	9%



In May, most K Street leaders said they were **CONCERNED** about the impact a recession would have on their industry

How concerned or unconcerned is your company, organization, or the industry you represent about the impact a recession would have on your industry?

K STREET MAY	TOTAL	DEM	GOP
CONCERNED (NET)	76%	85%	68%
NEITHER/I DON'T KNOW	10%	7%	12%
UNCONCERNED (NET)	15%	9%	20%



In the summer, Democrats were more likely than Republicans to say a recession is coming, but concern was significant across both audiences

Do you believe the U.S. will enter a recession this year?

CAPITOL HILL JUNE	TOTAL	DEM	GOP
Yes, we are already in a recession or will enter one in the next 12 months (NET)	45%	73%	20%
No, we will not enter a recession	26%	9%	61%
I don't know	19%	19%	18%

K STREET JULY	TOTAL	DEM	GOP
Yes, we are already in a recession or will enter one in the next 12 months (NET)	52%	68%	39%
No, we will not enter a recession	36%	19%	53%
I don't know	11%	14%	8%



A majority **CONSISTENTLY** reported they believed the economy would be weaker in 2025 than 2024

Do you believe the economy will be stronger or weaker this year than it was in 2024?

THE CANVASS 2025	STRONGER (NET)	NEITHER/I DON'T KNOW	WEAKER (NET)
January Special Edition	41%	21%	38%
May K Street	18%	9%	73%
June Capitol Hill	33%	10%	57%
July K Street	27%	17%	57%
September Capitol Hill	19%	19%	62%
October K Street	16%	21%	63%
November Capitol Hill*	23%	11%	66%

*Do you believe the economy will be stronger, weaker, or about the same one year from now?



Majorities of both audiences were also consistent in their belief that Trump is responsible for the current state of the economy

How responsible do you believe President Trump to be for the current state of the U.S. economy?

THE CANVASS 2025	RESPONSIBLE (NET)	I DON'T KNOW	NOT RESPONSIBLE (NET)
May K Street	77%	0%	20%
June Capitol Hill	89%	2%	9%
July K Street	91%	0%	10%
October K Street	98%	0%	2%
November Capitol Hill	89%	1%	10%



Most believe Trump’s tariff and trade negotiations and mid-decade redistricting will have the LARGEST impact on the midterms

Which of the following events from 2025 do you believe will have the greatest impact on the November 2026 midterm elections? (COMBINED CHOICE – TOP THREE)

CAPITOL HILL NOVEMBER	TOTAL	DEM	GOP
Trump's tariff and trade negotiations	80%	79%	80%
Mid-decade redistricting outcomes	70%	76%	63%
The administration's immigration and deportation policies	57%	66%	49%
The reconciliation package implementation	51%	53%	49%
Zohran Mamdani winning the New York City mayoral election	19%	7%	29%
The Epstein files controversy	10%	11%	10%
The assassination of Charlie Kirk	6%	2%	10%
The federal government shutdown	5%	2%	7%
The ceasefire agreement in Gaza	1%	2%	0%
Military strikes in the Pacific and Caribbean	1%	0%	2%
The war in Ukraine	0%	0%	0%



Most Canvass respondents did NOT believe DOGE would have a positive effect on how the federal government functions

Do you believe the proposed Department of Government Efficiency (DOGE) will have a positive or negative effect on how the federal government functions?



CANVASS INAUGURATION EDITION	TOTAL	CAP HILL	K STREET	DEM	GOP
POSITIVE (NET)	27%	24%	28%	5%	49%
NEITHER/I DON'T KNOW	36%	40%	35%	36%	36%
NEGATIVE (NET)	37%	36%	38%	59%	15%

A majority of Canvass respondents did NOT believe DOGE was effective in responsibly reducing waste, fraud, and abuse

How effective or ineffective does the member of Congress you work for believe the Department of Government Efficiency (DOGE) has been in responsibly reducing or eliminating waste, fraud, and abuse in the federal government?

CAPITOL HILL APRIL	TOTAL	DEM	GOP
EFFECTIVE (NET)	35%	0%	70%
NEITHER	5%	0%	10%
INEFFECTIVE (NET)	60%	100%	20%

How effective or ineffective do you believe the Department of Government Efficiency (DOGE) has been in responsibly reducing or eliminating waste, fraud, and abuse in the federal government?

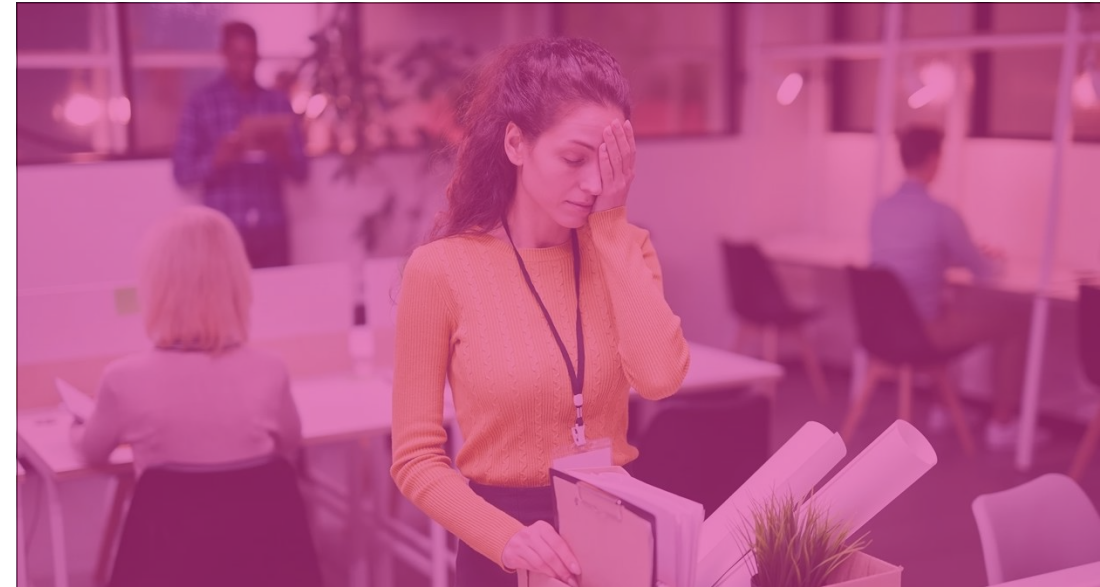
K STREET MAY	TOTAL	DEM	GOP
EFFECTIVE (NET)	20%	5%	32%
NEITHER	25%	29%	22%
INEFFECTIVE (NET)	55%	66%	46%



Looking ahead, most are **CONCERNED** that layoffs at some of America's largest companies will continue & become more widespread

How concerned or unconcerned are you that some of America's largest companies laying off workers will continue and become more widespread?

CAPITOL HILL NOVEMBER	TOTAL	DEM	GOP
CONCERNED (NET)	75%	95%	56%
I DON'T KNOW	1%	0%	2%
UNCONCERNED (NET)	24%	5%	41%



The Takeaway

- Insiders expressed consistent concern about the political impact of several key Trump priorities, especially **TARIFFS** and **IMMIGRATION ACTIONS**. Tariffs were a particular flashpoint, with Canvass respondents in both parties citing potential economic fallout and the political cost for Republicans in the 2026 midterm elections.
- Immigration was also seen as politically risky. Most respondents believed major legislative reform was **UNLIKELY** and viewed the administration's approach as carrying more **downside than upside**.
- DOGE was also widely viewed as **INEFFECTIVE**. Across multiple Canvass waves, insiders said DOGE wasn't delivering on its core promises.
- Economic concern continues. Most Capitol Hill staffers in November said they are **CONCERNED** that layoffs among some of America's largest companies will continue and become more widespread.





The Shutdown Came as No Surprise, but Neither Party Won the Messaging War

Most Capitol Hill respondents correctly PREDICTED it was likely there would be a government shutdown this year

How likely or unlikely do you believe it is that there will be a government shutdown before the end of the year?

CAPITOL HILL FEBRUARY	TOTAL	DEM	GOP
LIKELY (NET)	56%	76%	37%
NEITHER/I DON'T KNOW	18%	16%	20%
UNLIKELY(NET)	26%	8%	43%

CAPITOL HILL SEPTEMBER	TOTAL	DEM	GOP
LIKELY (NET)	79%	85%	74%
NEITHER/I DON'T KNOW	6%	2%	11%
UNLIKELY (NET)	14%	13%	16%



Most believed Schumer/Jeffries' messaging on the shutdown was **INEFFECTIVE**, while they are split by party on Thune & Johnson's

How effective or ineffective was **Sen. Schumer and Rep. Jeffries'** messaging around the government shutdown debate?

SCHUMER/JEFFRIES CAP HILL NOV.	TOTAL	DEM	GOP
EFFECTIVE (NET)	42%	69%	15%
INEFFECTIVE (NET)	58%	31%	85%

SCHUMER/JEFFRIES K ST. OCT.	TOTAL	DEM	GOP
EFFECTIVE (NET)	33%	50%	17%
NEITHER/I DON'T KNOW	14%	16%	12%
INEFFECTIVE (NET)	52%	33%	71%

How effective or ineffective was **Sen. Thune and Speaker Johnson's** messaging around the government shutdown debate?

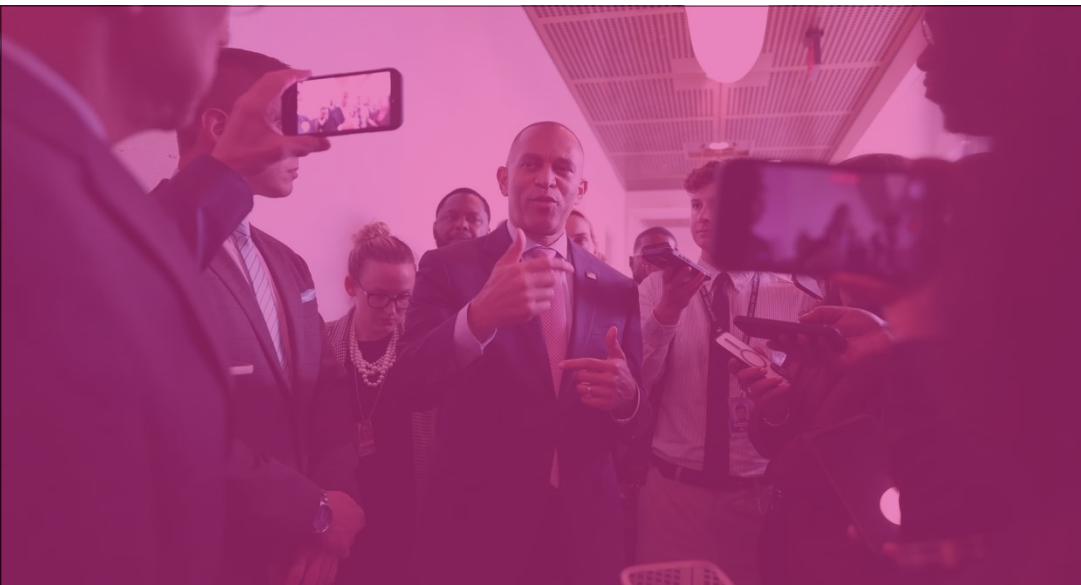
THUNE/JOHNSON CAP HILL NOV.	TOTAL	DEM	GOP
EFFECTIVE (NET)	44%	15%	73%
INEFFECTIVE (NET)	56%	85%	27%

THUNE/JOHNSON K ST. OCT.	TOTAL	DEM	GOP
EFFECTIVE (NET)	42%	31%	54%
NEITHER/I DON'T KNOW	20%	16%	26%
INEFFECTIVE (NET)	38%	53%	20%



However, most Canvass respondents believe **REPUBLICANS** will be blamed **MORE** for the shutdown

Which party do you believe will be blamed MOST for the government shutdown?



**If there is a government shutdown, which party do you believe would be MORE responsible?*

CAPITOL HILL SEPTEMBER*	TOTAL	DEM	GOP
The Republican Party	58%	93%	25%
The Democratic Party	42%	7%	75%

K STREET OCTOBER	TOTAL	DEM	GOP
The Republican Party	60%	85%	30%
The Democratic Party	40%	15%	70%

CAPITOL HILL NOVEMBER	TOTAL	DEM	GOP
The Republican Party	61%	90%	34%
The Democratic Party	39%	10%	66%

Most likely to pass in 2026: crypto market structure reform, tariff relief for farmers, energy permitting reform, & the Farm Bill

How likely or unlikely is it that Congress will pass legislation addressing each of the following in 2026? (LIKELY)

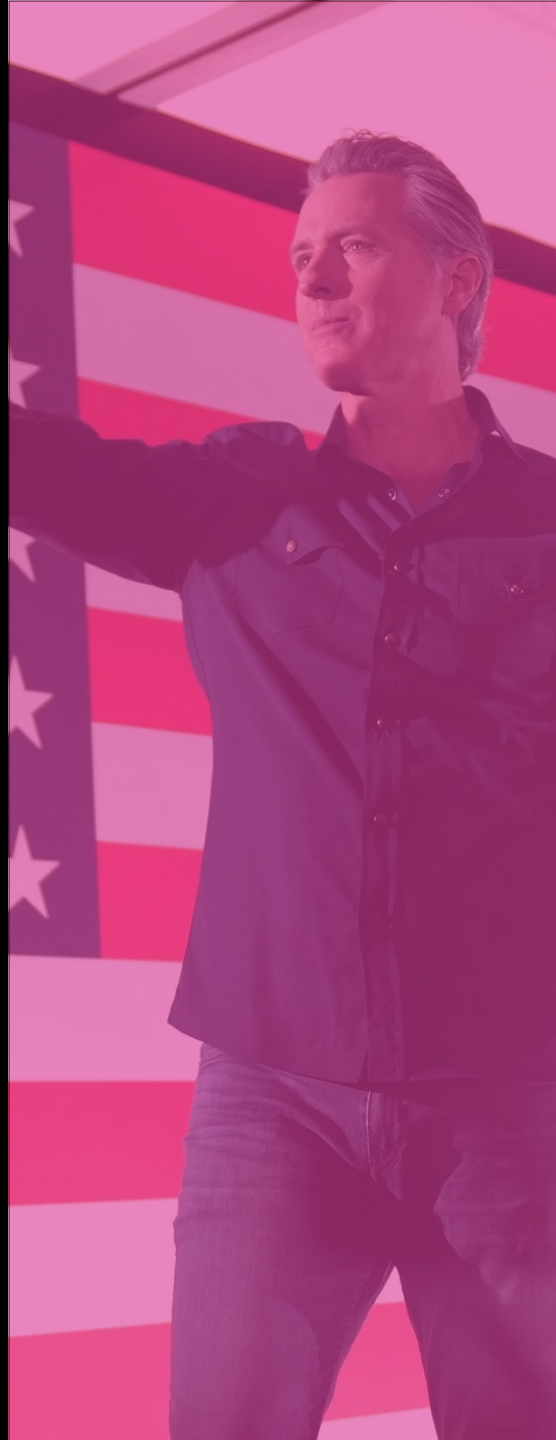
	TOTAL	DEM	GOP
Crypto market structure reform	56%	50%	62%
Tariff relief for farmers	56%	42%	70%
Energy permitting reform	52%	32%	71%
Farm Bill	51%	44%	56%
Kids online protection	40%	32%	48%
Full appropriations package	39%	31%	46%
Preemption of state AI rules	25%	11%	38%
Semiconductor export limits	23%	15%	30%
Immigration reform and border policy	14%	2%	24%
Stricter regulations and oversight on nonprofit groups involved in political activity	12%	10%	13%



The Takeaway

- The Canvass saw the shutdown and political gridlock coming well before it arrived. Last February, most Capitol Hill respondents believed it was **LIKELY** there would be a shutdown this year.
- But the political blame game was muddled. While Republicans were seen as **more likely to be blamed** for the impasse, the data shows **Democratic messaging failed to break through**.
- Looking ahead to 2026, according to Capitol Hill senior staffers, we are **MOST likely** to see action on crypto market structure reform, tariff relief for farmers, energy permitting reform, and the Farm Bill.





Gavin Newsom Has Emerged as the Leader of the Democratic Resistance

Gavin Newsom's Democratic party leadership surged in 2025 – rising from 40% in January to 82% by November

Who do you believe is MOST likely to emerge as the leader of the Democratic Party during the second Trump administration? (COMBINED CHOICE – TOP THREE)



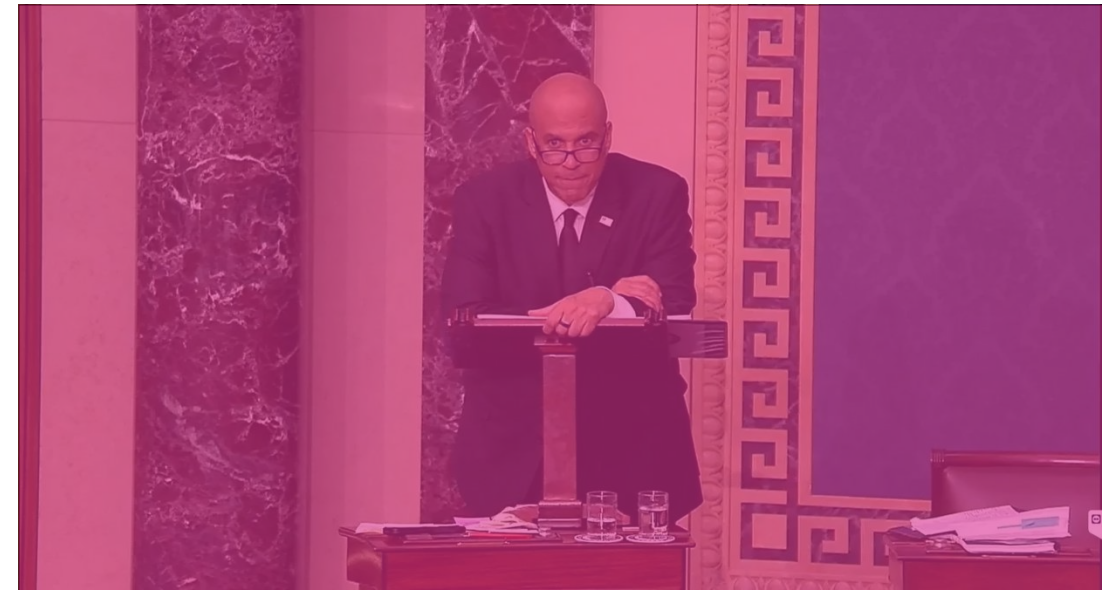
Governor Gavin Newsom	TOTAL	DEM	GOP
January (Special Edition)	40%	40%	41%
February (Capitol Hill)	37%	33%	40%
April (Capitol Hill)	22%	10%	34%
May (K Street)	27%	20%	32%
June (Capitol Hill)	51%	42%	59%
July (K Street)	48%	48%	50%
September (Capitol Hill)	76%	83%	69%
October (K Street)	71%	72%	70%
November (Capitol Hill)	82%	81%	82%

Overall, a majority believe congressional Democrats' opposition to the Trump Administration has been **INEFFECTIVE**

How effective or ineffective do you believe congressional Democrats' opposition to the Trump Administration's agenda has been ?

K Street July	TOTAL	DEM	GOP
EFFECTIVE (NET)	3%	6%	1%
NEITHER	6%	8%	3%
INEFFECTIVE (NET)	91%	85%	96%

Capitol Hill June	TOTAL	DEM	GOP
EFFECTIVE (NET)	20%	31%	0%
NEITHER	11%	21%	2%
INEFFECTIVE (NET)	69%	38%	98%



But in September, most senior staffers believed Gov. Newsom's opposition to Trump's redistricting efforts was **EFFECTIVE**

How effective or ineffective do you believe California Governor Gavin Newsom's opposition to Trump's redistricting efforts has been?

CAPITOL HILL SEPTEMBER	TOTAL	DEM	GOP
EFFECTIVE (NET)	59%	96%	23%
NEITHER	12%	2%	22%
INEFFECTIVE (NET)	29%	2%	55%

On the GOP side, most believe JD Vance & Marco Rubio have been MOST successful in increasing their prominence among Trump’s base

In your opinion, which of the following Republicans has been MOST successful in increasing their prominence among Trump’s base this year?
(COMBINED CHOICE – TOP THREE)

K STREET OCTOBER	TOTAL	DEM	GOP
JD Vance	79%	77%	82%
Marco Rubio	55%	41%	70%
Kristi Noem	37%	45%	29%
Pete Hegseth	34%	42%	26%
Mike Johnson	34%	36%	32%
Scott Bessent	19%	12%	25%
Pam Bondi	15%	21%	10%
John Thune	13%	10%	16%
Elon Musk	9%	13%	5%
Ted Cruz	5%	3%	6%

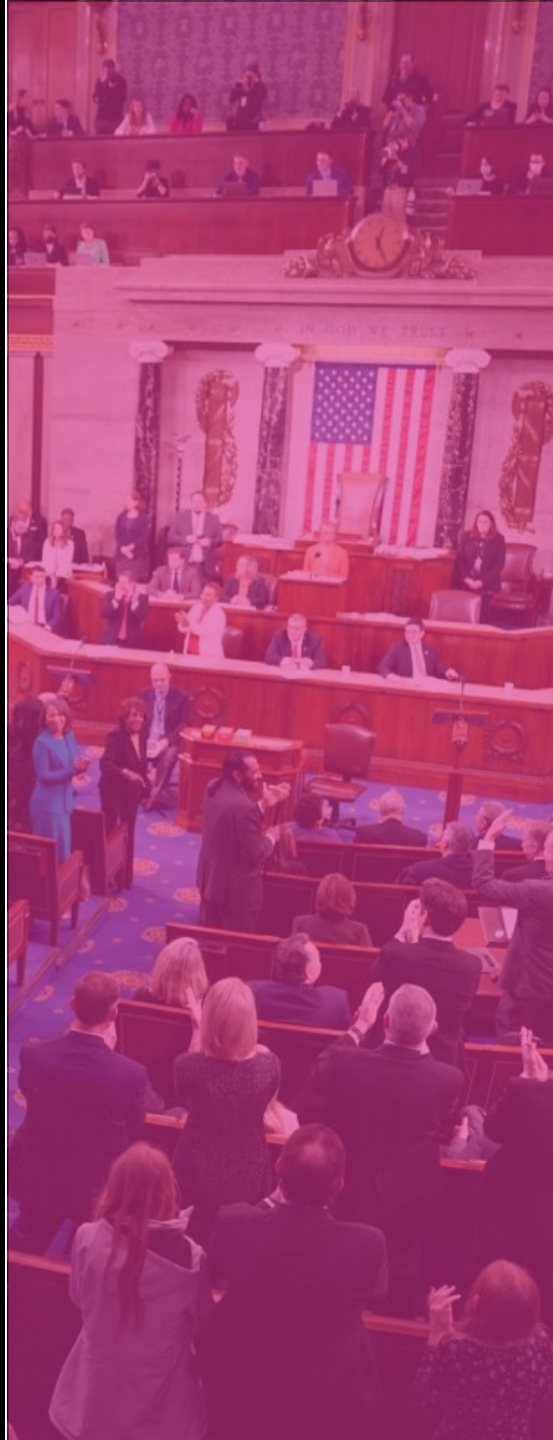
CAPITOL HILL NOVEMBER	TOTAL	DEM	GOP
JD Vance	75%	74%	76%
Marco Rubio	61%	55%	68%
Pete Hegseth	31%	34%	28%
Mike Johnson	28%	18%	38%
Kristi Noem	24%	39%	9%
Marjorie Taylor Greene	21%	31%	11%
Scott Bessent	19%	5%	33%
Pam Bondi	19%	28%	11%
John Thune	17%	13%	22%
Ted Cruz	4%	2%	4%



The Takeaway

- Throughout 2025, insiders consistently named **California Gov. Gavin Newsom** as the **MOST influential Democrat** in national politics – ahead of congressional leaders and former Vice President Kamala Harris. His standing grew as the year went on, even while Democratic staff and K Street respondents described the party as divided on strategy and message.
- The trend was clear: despite internal disagreements, Democrats are **INCREASINGLY rallying around Newsom** as their strongest national voice heading into the midterm campaign season, particularly due to his off-year electoral redistricting success.
- On the GOP side, both Capitol Hill and K Street leaders believe JD Vance and Marco Rubio have been **MOST** successful in increasing their prominence among Trump's base.





Democrats Have Midterm Momentum, but a Split Congress Is Expected

Most senior staffers believe the Democratic Party is **DIVIDED**, while most believe the GOP is **UNITED**

How united or divided do you believe the Democratic Party currently is?

DEM PARTY – CAP HILL NOV.	TOTAL	DEM	GOP
UNITED (NET)	28%	41%	15%
I DON'T KNOW	1%	2%	0%
DIVIDED (NET)	71%	56%	85%

How united or divided do you believe the Republican Party currently is?

GOP PARTY – CAP HILL NOV.	TOTAL	DEM	GOP
UNITED (NET)	62%	56%	68%
I DON'T KNOW	1%	2%	0%
DIVIDED (NET)	37%	42%	32%



However, most senior staffers across parties believe **DEMOCRATS** are in a stronger position headed into 2026

Which party do you believe is in a stronger position entering the campaign season ahead of the November 2026 midterm elections?



CAPITOL HILL NOVEMBER	TOTAL	DEM	GOP
The Democratic Party	78%	95%	62%
The Republican Party	22%	5%	38%

After the 2026 midterms, most believe Democrats will FLIP the House, while Republicans will maintain control of the Senate

Who do you believe will be in control of **the House** after the 2026 elections?

HOUSE	DEMOCRATS	REPUBLICANS
June Capitol Hill	79%	21%
July K Street	82%	18%
September Capitol Hill	66%	34%
October K Street	69%	31%
November Capitol Hill	76%	24%

Who do you believe will be in control of **the Senate** after the 2026 elections?

SENATE	DEMOCRATS	REPUBLICANS
June Capitol Hill	5%	95%
July K Street	10%	90%
September Capitol Hill	8%	92%
October K Street	7%	95%
November Capitol Hill	10%	90%



Most CORRECTLY predicted Democrat Mikie Sherrill would WIN the Governor's race in New Jersey

Who do you believe will win the Governor's race in New Jersey?



K STREET OCTOBER	TOTAL	DEM	GOP
Democrat Mikie Sherrill	78%	95%	60%
Republican Jack Ciattarelli	22%	5%	40%

CAPITOL HILL SEPTEMBER	TOTAL	DEM	GOP
Mikie Sherrill	90%	98%	83%
Jack Ciattarelli	10%	2%	17%

Nearly all CORRECTLY predicted Democrat Abigail Spanberger will win the Governor's race in Virginia

Who do you believe will win the Governor's race in Virginia?

K STREET OCTOBER	TOTAL	DEM	GOP
Abigail Spanberger	94%	98%	90%
Winsome Earle-Sears	6%	2%	10%

CAPITOL HILL SEPTEMBER	TOTAL	DEM	GOP
Abigail Spanberger	90%	100%	80%
Winsome Earle-Sears	10%	0%	20%



The Takeaway

- The major statewide contests of 2025 – the governor’s races in New Jersey and Virginia – gave insiders their earliest read on the midterm environment. Democrats **OVERPERFORMED** in both states, a result many respondents saw as a sign of stronger-than-expected Democratic energy heading into 2026.
- Looking ahead, across multiple waves, both K Street leaders and senior Hill staffers most expect the **GOP to MAINTAIN control of the Senate** in 2026.
- At the same time, respondents increasingly said the **House is likely to FLIP**, even with redistricting changes, retirements, and the national political environment.
- In November, most Capitol Hill respondents believe the **DEMOCRATS** are in a stronger position entering the campaign season ahead of the November 2026 midterm elections – including most Republican staffers.



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