



The Canvass 2023: Year in Review

A year-end review of key findings and insights from the 2023 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 2023
- 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 2023

Summary of Key Findings

1 Despite dysfunction, Congress has been able to work **TOGETHER** when it counts.

2 Congress was largely **INEFFECTIVE** at passing meaningful legislation this year.

3 The House Republican conference was defined by its **INSTABILITY**, and the Republican Party remains **DIVIDED**.

4 Trump had a **STRONG** primary campaign start but Canvass respondents **DOUBT** his prospects in the general election.

5 There is Democratic Party **UNITY** behind Biden.





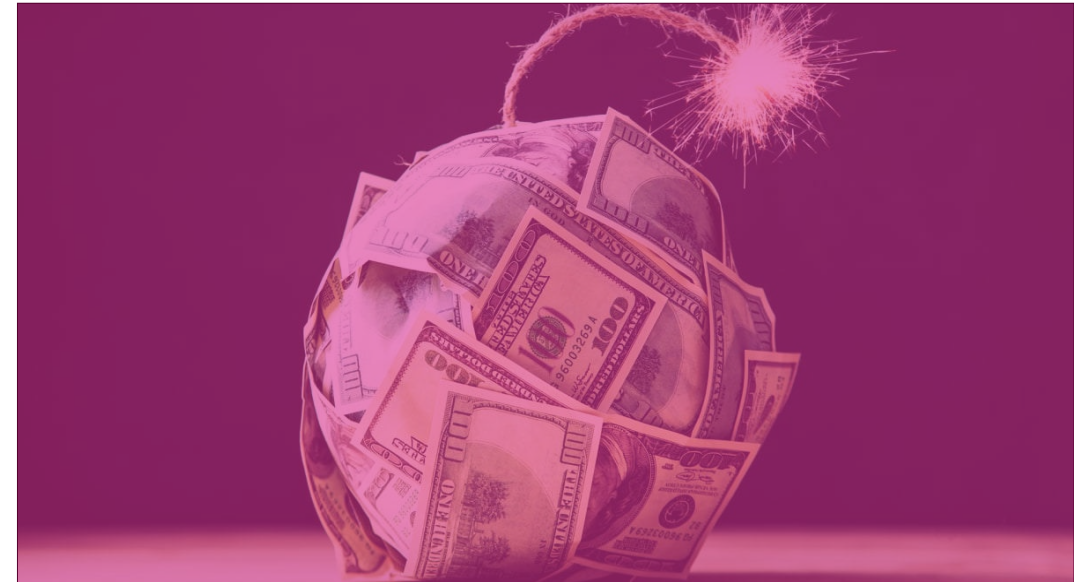
Despite dysfunction, Congress
has been able to work
TOGETHER when it counts

Most Capitol Hill & K Street leaders correctly believed it was **UNLIKELY** that the government would default on its debt

How likely or unlikely do you believe it is that the U.S. will default on its debt obligations?

CAPITOL HILL FEBRUARY	TOTAL	DEM	GOP
LIKELY (NET)	12%	19%	5%
NEITHER/I DON'T KNOW	9%	15%	4%
UNLIKELY (NET)	79%	66%	91%

K STREET MARCH	TOTAL	DEM	GOP
LIKELY (NET)	23%	30%	17%
NEITHER/I DON'T KNOW	5%	5%	4%
UNLIKELY (NET)	73%	65%	79%



Most K Street leaders and a plurality of senior Hill staffers were **CONFIDENT** in leadership's ability to raise the debt ceiling

How confident or unconfident are you in President Joe Biden, Senate Majority Leader Chuck Schumer, and Speaker Kevin McCarthy's ability to negotiate a solution to raise the debt ceiling?

K STREET MAY	TOTAL	DEM	GOP
CONFIDENT (NET)	57%	53%	61%
NEITHER/I DON'T KNOW	12%	12%	12%
UNCONFIDENT (NET)	31%	35%	26%

How confident or unconfident is the member of Congress you work for in President Biden and Speaker Kevin McCarthy's ability to negotiate a solution to raise the debt ceiling?

CAPITOL HILL FEBUARY	TOTAL	DEM	GOP
CONFIDENT	47%	35%	58%
NEITHER/I DON'T KNOW	30%	37%	22%
UNCONFIDENT	24%	27%	20%



Most K St. leaders and Capitol Hill senior staffers predicted that FAA Re-authorization was MOST likely to pass this year

How likely or unlikely is it that Congress will pass legislation to address each of the following issues this year?

CANVASS K STREET JULY	TOTAL	DEM	GOP
Federal Aviation Administration (FAA) Reauthorization	80%	78%	84%
Increased Pentagon funding	76%	83%	70%
Increased Ukraine funding	71%	68%	73%
Farm Bill Reauthorization	66%	66%	66%
China competition	61%	57%	64%
Rail safety	49%	44%	53%
Artificial intelligence (AI) regulation	21%	25%	17%
Banking for the marijuana industry	14%	17%	12%

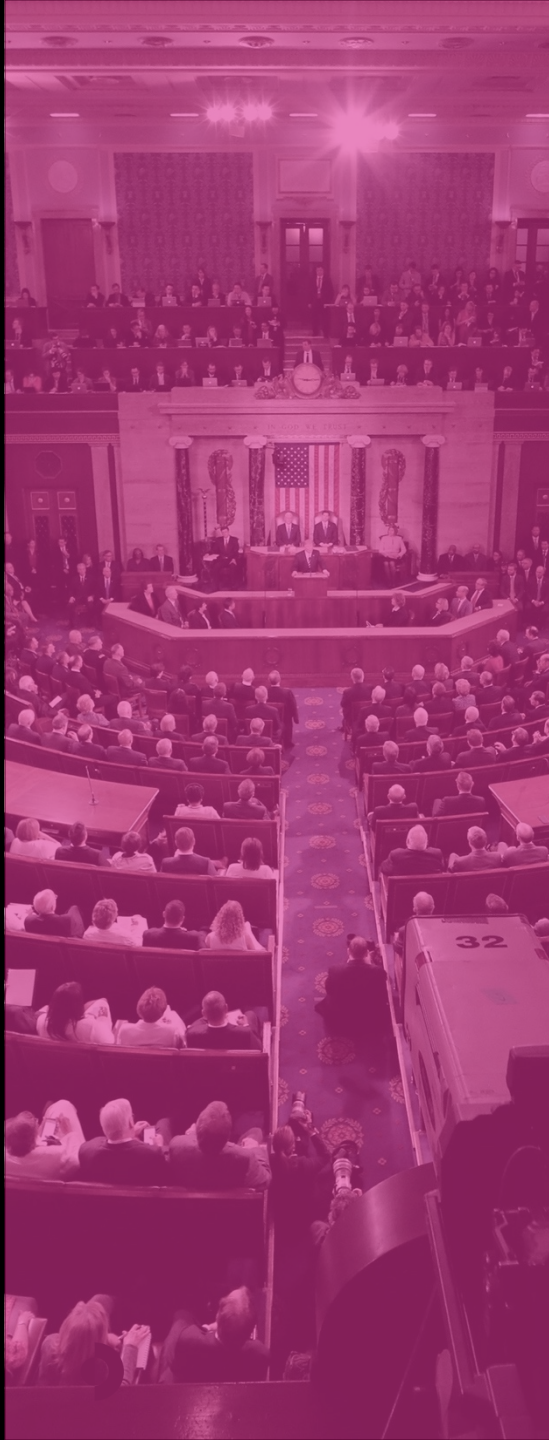
CANVASS CAPITOL HILL SEPTEMBER	TOTAL	DEM	GOP
Federal Aviation Administration (FAA) Reauthorization	82%	80%	84%
Increased Pentagon funding	79%	78%	81%
Increased Ukraine funding	73%	74%	72%
Farm Bill Reauthorization	61%	66%	56%
Increased funding for border security	61%	60%	63%
China competition	43%	43%	43%
Rail safety	20%	28%	11%
Artificial intelligence (AI) regulation	13%	16%	11%
Banking for the marijuana industry	13%	18%	9%
Prescription drugs / insulin pricing	10%	6%	15%
Credit Card Competition Act	3%	4%	3%



The Takeaway

- Despite dysfunction and divided government, Capitol Hill senior staffers and K Street leaders **understood where compromise could be reached** and where it was unlikely.
- When many historically routine pieces of legislation were slowed or in danger of not passing, The Canvass respondents were always **highly confident** that Federal Aviation Administration (FAA) Re-authorization would be addressed.





Congress was **INEFFECTIVE**
at passing meaningful
legislation this year

Early on, K Street leaders predicted this Congress would be **INEFFECTIVE** at passing meaningful legislation

How effective or ineffective do you believe the new Congress will be at passing meaningful legislation?

K STREET JANUARY	TOTAL	DEM	GOP
EFFECTIVE (NET)	7%	3%	12%
NEITHER/I DON'T KNOW	6%	5%	8%
INEFFECTIVE (NET)	86%	92%	80%



While many were CONCERNED about the potential for systemic financial risk following bank failures this past spring...

How concerned or unconcerned is the member of Congress you work for about the potential for systemic financial risk following the collapses of Silicon Valley Bank and Signature Bank?



CAPITOL HILL APRIL	TOTAL	DEM	GOP
CONCERNED (NET)	52%	50%	53%
NEITHER/I DON'T KNOW	19%	25%	13%
UNCONCERNED (NET)	29%	25%	34%

K STREET MAY	TOTAL	DEM	GOP
CONCERNED (NET)	49%	46%	51%
NEITHER/I DON'T KNOW	15%	15%	17%
UNCONCERNED (NET)	31%	34%	29%

They believed it was UNLIKELY that Congress would pass legislation that addressed the bank failures

How likely or unlikely is it that Congress will pass legislation addressing the recent bank failures?

CAPITOL HILL APRIL	TOTAL	DEM	GOP
LIKELY (NET)	23%	21%	25%
NEITHER/I DON'T KNOW	18%	21%	16%
UNLIKELY (NET)	58%	58%	58%

K STREET MAY	TOTAL	DEM	GOP
LIKELY (NET)	23%	22%	25%
NEITHER/I DON'T KNOW	10%	11%	10%
UNLIKELY (NET)	64%	67%	61%



Both senior staffers and K St leaders also believed it was UNLIKELY Congress would pass the Senate Banking Committee claw back bill

How likely or unlikely do you believe it is that this Congress will pass legislation cleared by the Senate Banking Committee in June to expand regulators' ability to claw back bank executive pay along with other proposed reforms?

K STREET JULY	TOTAL	DEM	GOP
LIKELY (NET)	33%	31%	34%
NEITHER/I DON'T KNOW	13%	12%	12%
UNLIKELY (NET)	55%	57%	54%

CAPITOL HILL SEPTEMBER	TOTAL	DEM	GOP
LIKELY (NET)	13%	16%	11%
NEITHER/I DON'T KNOW	26%	25%	26%
UNLIKELY (NET)	61%	60%	62%



A majority believed it was UNLIKELY that Congress would pass reforms to federal cannabis law

How likely or unlikely do you believe it is that the 118th Congress will pass reforms to federal cannabis law, such as the SAFE Banking Act?

K STREET MARCH	TOTAL	DEM	GOP
LIKELY (NET)	18%	16%	21%
NEITHER/I DON'T KNOW	23%	23%	22%
UNLIKELY (NET)	59%	61%	56%

CAPITOL HILL APRIL	TOTAL	DEM	GOP
LIKELY (NET)	19%	29%	9%
NEITHER/I DON'T KNOW	10%	12%	8%
UNLIKELY (NET)	71%	59%	83%



Even though most thought it was **IMPORTANT** to prioritize legislation to mitigate the risks of AI, they believed it was **UNLIKELY** to pass

How important or unimportant is it to the member of Congress you work for that this Congress prioritizes legislation to mitigate the potential risks associated with artificial intelligence (AI) development? (CAPITOL HILL SEPTEMBER)

CANVASS CAPITOL HILL SEPTEMBER	TOTAL	DEM	GOP
IMPORTANT (NET)	63%	71%	55%
NEITHER/I DON'T KNOW	23%	22%	23%
UNIMPORTANT (NET)	14%	7%	22%

AI REGULATION (LIKELIHOOD TO PASS)	JULY 2023	OCTOBER 2023	NOVEMBER 2023
LIKELY (NET)	21%	13%	8%
NEITHER/I DON'T KNOW	14%	13%	19%
UNLIKELY (NET)	66%	74%	73%



The Takeaway

- At the start of the year, both Capitol Hill and K Street told us to **expect an INEFFECTIVE Congress**, a prediction that has proven largely accurate.
- Even in the weeks and months after major events – like the Norfolk Southern train derailment and bank failures in the spring – Capitol Hill senior staffers and K Street leaders recognized there was **LITTLE chance of achieving compromise** to pass legislation to address these issues.
- Many K Street leaders and Capitol Hill senior staffers recognized the **importance of addressing key emerging issues** such as AI regulation and federal cannabis reform. However, there was a notable **LACK of confidence** in the ability of a divided Congress to effectively tackle these matters.



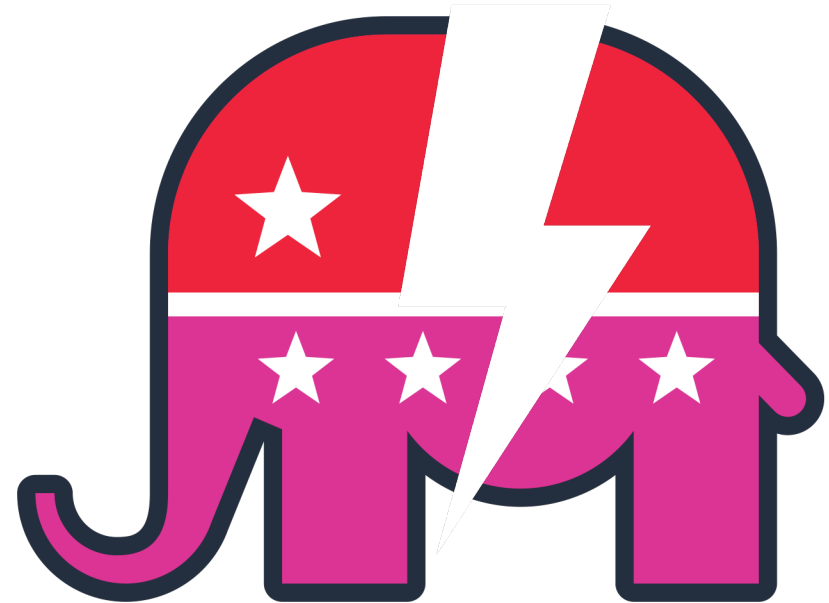


The House Republican conference was defined by its INSTABILITY

Early on, Republican K Street leaders reported they believed the Republican Party was DIVIDED

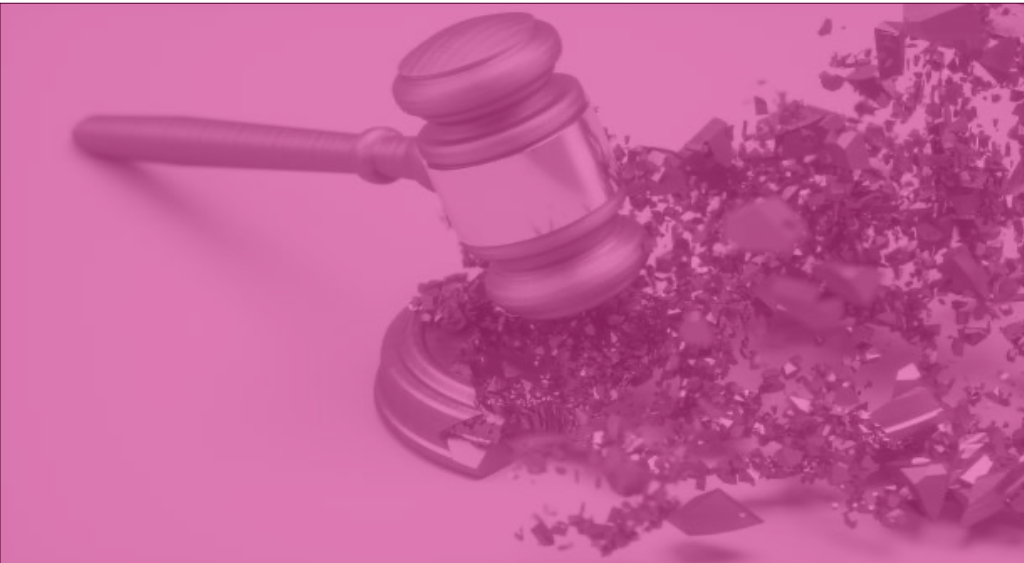
How divided or united do you believe the Republican Party is? (REPUBLICANS ONLY)

GOP K STREET JANUARY	GOP
UNITED (NET)	21%
NEITHER/I DON'T KNOW	5%
DIVIDED (NET)	74%



Most believed McCarthy's deal to win the speakership would make him LESS effective as speaker

Do you believe the deal Kevin McCarthy struck to become speaker of the House will make him more effective or less effective as speaker?



K STREET JANUARY	TOTAL	DEM	GOP
MORE EFFECTIVE	15%	0%	29%
NEITHER/I DON'T KNOW	17%	4%	30%
LESS EFFECTIVE	68%	95%	41%

At the start of his speakership, most predicted that Rep. McCarthy would NOT remain speaker for the entire Congress

How long do you think Kevin McCarthy will remain speaker of the House?

K STREET JANUARY	TOTAL	DEM	GOP
1-3 months	2%	2%	2%
4-6 months	13%	15%	12%
7-12 months	41%	50%	32%
13-18 months	13%	15%	11%
The entire Congress	31%	18%	44%

CAPITOL HILL FEBRUARY	TOTAL	DEM	GOP
1-3 months	1%	0%	3%
4-6 months	9%	14%	3%
7-12 months	35%	50%	20%
13-18 months	15%	16%	14%
The entire Congress	40%	20%	60%



Most senior staffers & K St leaders correctly believed the debt limit deal WEAKENED McCarthy's standing with GOP's most right-wing members

Do you believe the debt limit deal Kevin McCarthy struck with Joe Biden will strengthen or weaken the speaker's standing among the Republican Party's most right-wing members?

CAPITOL HILL JUNE	TOTAL	DEM	GOP
STRENGTHEN (NET)	7%	0%	14%
NEITHER/I DON'T KNOW	15%	11%	19%
WEAKEN (NET)	78%	89%	67%

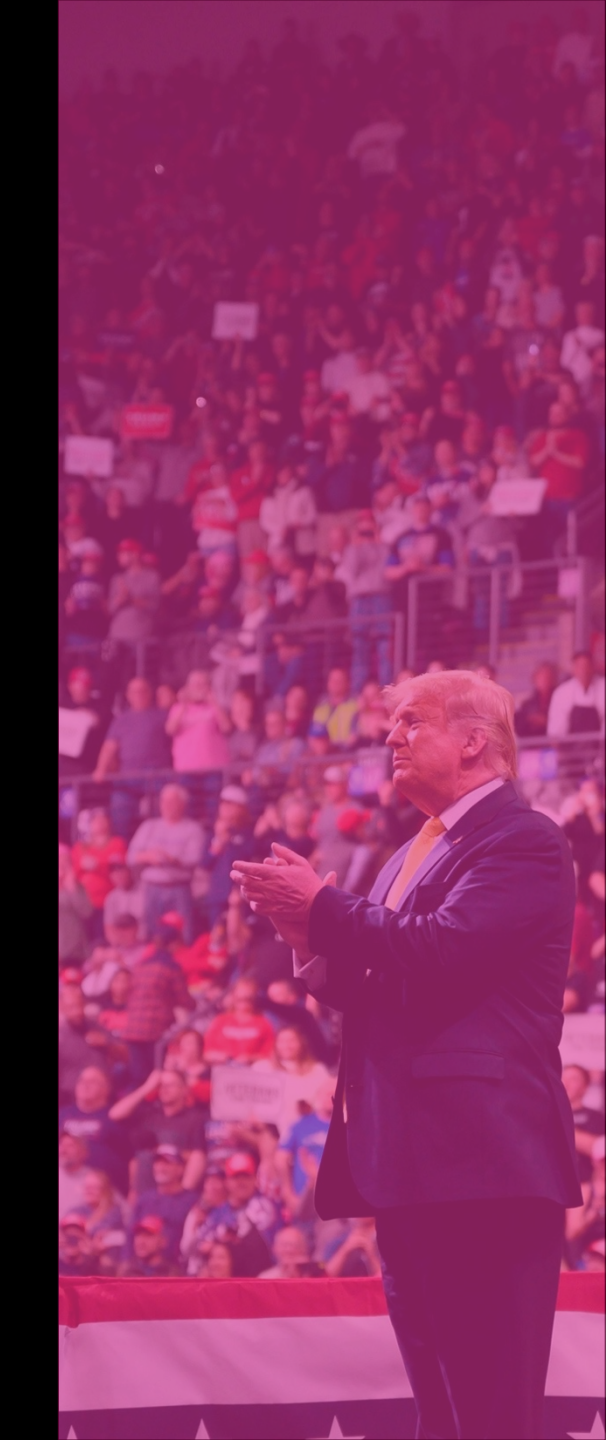
K STREET JULY	TOTAL	DEM	GOP
STRENGTHEN (NET)	21%	11%	29%
NEITHER/I DON'T KNOW	17%	8%	25%
WEAKEN (NET)	62%	81%	46%



The Takeaway

- 2023 has been marked by **INSTABILITY** within the House Republican conference, as **their narrow majority empowered the right wing** to to derail leadership priorities.
- House Republicans' **struggle to maintain a unified front and cohesive policy direction** amidst internal changes has been a key factor in the difficulties faced in advancing legislation.
- This instability not only impacts the party's internal dynamics but also **impacts its ability to effectively navigate bipartisan lawmaking** in a divided Congress.
- This instability has led to frustration among key Republican political figures, like Rep. Patrick McHenry, Senator Mitt Romney, and former House Speaker Kevin McCarthy, who have all decided to **NOT run for re-election or resign before the end of this Congress.**



A photograph of Donald Trump speaking at a campaign event. He is wearing a dark suit and a yellow tie, and is clapping his hands. He is standing on a stage with a red and white striped banner in front of him. The background is a large crowd of people, many of whom are wearing red hats. The entire image has a purple tint.

Trump had a **STRONG** primary campaign start but there is **DOUBT** about his prospects in the general election

A majority of Hill senior staffers believed TRUMP had the strongest start to his campaign of any Republican

Which Republican presidential primary candidate has had the strongest start to their campaign?



	TOTAL	DEM	GOP
Donald Trump	52%	67%	37%
Nikki Haley	18%	13%	23%
Vivek Ramaswamy	14%	15%	14%
Ron DeSantis	5%	0%	9%
Tim Scott	4%	0%	7%
Mike Pence	1%	0%	1%
Doug Burgum	1%	0%	1%
Others	0%	0%	0%
I don't know	6%	6%	6%

Most believed Trump’s legal challenges would HELP him in the 2024 GOP primary

Have the multiple indictments of Donald Trump helped or harmed him in the Republican presidential primary?

CAPITOL HILL SEPTEMBER	TOTAL	DEM	GOP
HELP (NET)	67%	55%	80%
NEITHER/I DON’T KNOW	20%	26%	15%
HARM (NET)	13%	19%	6%

Do you believe the Manhattan district attorney’s pursuit of charges against former President Trump will help or harm Trump in the 2024 Republican primary for president?

K STREET APRIL	TOTAL	DEM	GOP
HELP (NET)	64%	53%	75%
NEITHER/I DON’T KNOW	19%	26%	10%
HARM (NET)	18%	20%	15%



But a majority also believed Trump's indictments would HARM congressional Republicans' reelection chances in '24

Do you think that Donald Trump's indictments will help or harm congressional Republicans' reelection chances in 2024?

K STREET OCTOBER	TOTAL	DEM	GOP
HELP (NET)	6%	3%	7%
NEITHER/I DON'T KNOW	20%	16%	24%
HARM (NET)	75%	82%	70%

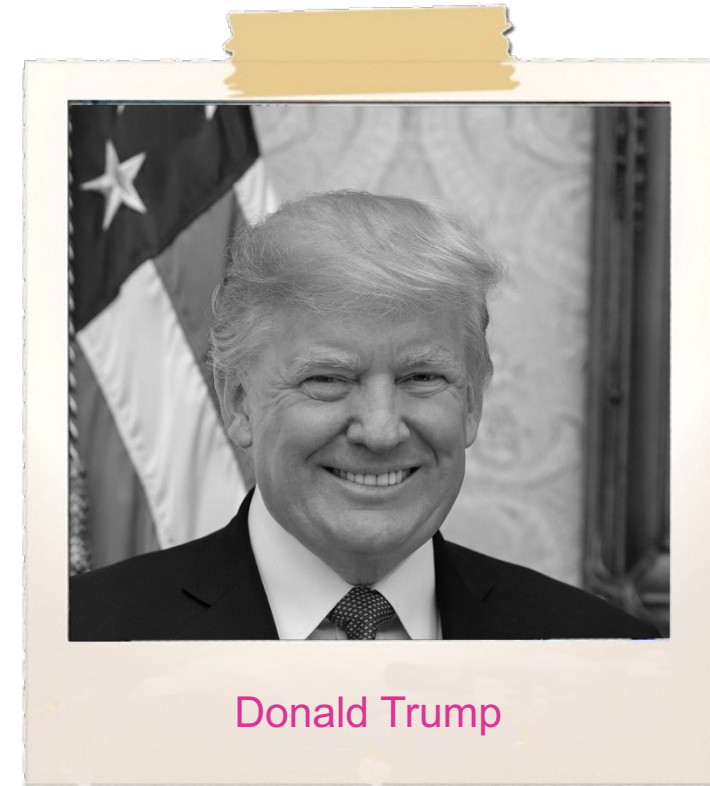
CAPITOL HILL NOVEMBER	TOTAL	DEM	GOP
HELP (NET)	7%	3%	11%
NEITHER/I DON'T KNOW	19%	13%	25%
HARM (NET)	73%	84%	64%



Most GOP K St & Capitol Hill leaders consistently reported they do NOT believe Trump is the GOP's best option for 2024

Do you agree or disagree that former President Donald Trump is the Republican Party's best option to win the 2024 presidential election?
(REPUBLICANS ONLY) (AGREE)

	AGREE
January K Street	2%
February Capitol Hill	5%
March K Street	1%
April Capitol Hill	4%
May K Street	4%
June Capitol Hill	5%
July K Street	3%
September Capitol Hill	11%
October K Street	9%
November Capitol Hill	13%



The Takeaway

- Canvass respondents generally agree that Trump's strategy of not participating in debates along with his current legal peril are actually **BOOSTING him** in the Republican primary.
- However, there is consensus that these same factors might **HARM** the broader Republican Party, particularly in congressional races, and **will NOT be effective** for Trump in the general election.
- Recent elections, including those in November 2023, have highlighted concerning trends for Republicans. A notable example is the Kentucky gubernatorial race, where a **Trump-endorsed candidate lost** by a significant margin, while other Republican candidates won decisively in statewide races.
- Additionally, the success of abortion access ballot measures in traditionally red states such as Ohio, Kansas, Kentucky, and Montana further underscores the challenges faced by Trump-backed candidates. These outcomes reinforce **GROWING concerns about the impact of Trump's endorsement on the future direction and success of the Republican Party.**

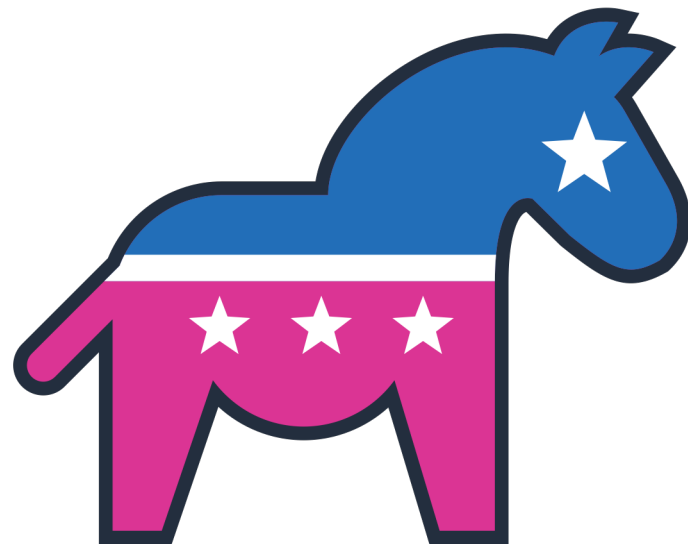




The Democratic Party is largely
UNITED behind Biden

In January, Democratic K Street leaders believed the Democratic Party was UNITED

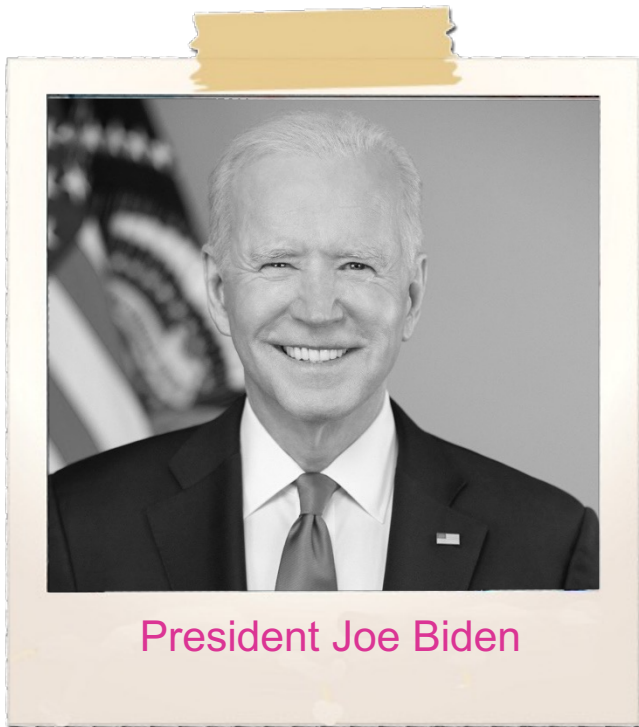
How divided or united do you believe the Democratic Party is? (DEMOCRATS ONLY)



K STREET JANUARY	DEM
UNITED (NET)	76%
NEITHER/I DON'T KNOW	4%
DIVDED (NET)	20%

A majority have remained in AGREEMENT that Biden is the party's best option for winning the 2024 election

Do you agree or disagree that President Joe Biden is the Democratic Party's best option to win the 2024 presidential election? (DEMOCRATS ONLY)



	AGREE
January K Street	59%
February Capitol Hill	76%
March K Street	69%
April Capitol Hill	79%
May K Street	67%
June Capitol Hill	79%
July K Street	72%
September Capitol Hill	80%
October K Street	62%
November Capitol Hill	72%

There was consensus that it is UNLIKELY that any prominent elected Democratic lawmakers will challenge Biden for the 2024 nomination

How likely or unlikely is it that any prominent elected Democratic lawmakers will challenge President Biden for the 2024 Democratic nomination for president?

K STREET JULY	TOTAL	DEM	GOP
LIKELY (NET)	16%	6%	25%
NEITHER/I DON'T KNOW	2%	1%	3%
UNLIKELY (NET)	82%	93%	71%

CAPITOL HILL SEPTEMBER	TOTAL	DEM	GOP
LIKELY (NET)	9%	2%	16%
NEITHER/I DON'T KNOW	6%	0%	10%
UNLIKELY (NET)	86%	98%	74%



However, most believe “Bidenomics” is an INEFFECTIVE campaign message for congressional Democrats in 2024

Do you believe "Bidenomics" is an effective or ineffective campaign message for congressional Democrats in the 2024 election?



CAPITOL HILL NOVEMBER	TOTAL	DEM	GOP
EFFECTIVE (NET)	19%	34%	6%
NEITHER/I DON'T KNOW	9%	19%	1%
INEFFECTIVE (NET)	71%	47%	93%

K STREET OCTOBER	TOTAL	DEM	GOP
EFFECTIVE (NET)	14%	25%	5%
NEITHER/I DON'T KNOW	16%	24%	8%
INEFFECTIVE (NET)	70%	51%	87%

Most believe the ECONOMY and his AGE will have the greatest impact on Biden’s 2024 presidential re-election campaign

Which of the following issues do you believe will have the greatest impact on Biden’s 2024 presidential re-election campaign? (COMBINED CHOICE – TOP TWO)

CAPITOL HILL SEPTEMBER	TOTAL	DEM	GOP
State of the economy	85%	92%	79%
His age	76%	75%	78%
Southern border crisis	18%	19%	16%
Hunter Biden	14%	4%	23%
The withdrawal from Afghanistan	3%	1%	4%
Ukraine war	2%	3%	0%
None of them	1%	2%	0%
I don’t know	0%	0%	0%

K STREET OCTOBER	TOTAL	DEM	GOP
The economy and inflation	73%	75%	72%
His age	72%	72%	70%
Southern border crisis	29%	27%	31%
Violent crime	17%	15%	20%
Hunter Biden	6%	8%	5%
Ukraine war	2%	3%	1%
The withdrawal from Afghanistan	0%	0%	1%
Labor issues	0%	0%	0%
None of them	0%	0%	0%
I don’t know	0%	0%	1%



The takeaway

- There was consensus among Democratic K Street leaders and senior Hill staffers that it was **UNLIKELY** for any notable elected Democratic lawmaker to challenge President Biden for the nomination in the 2024 presidential race. Additionally, there's agreement that Biden **remains the BEST option** for the Democratic Party's success in the 2024 elections.
- However, there is concern that "Bidenomics," a term the White House has promoted and now Republicans have co-opted, **could be DETRIMENTAL** to both President Biden and congressional Democrats in the 2024 election.
- The Canvass respondents also agree that the **ECONOMY** and his **AGE** will have the greatest impact on President Biden's 2024 re-election campaign.
- This cohesiveness **CONTRASTS** with the divisions and leadership challenges currently faced by the Republican Party, and it could play a crucial role in shaping the political dynamics and outcomes of the 2024 election.



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