



The Canvass 2022 Year In Review

A year-end review of key findings and insights from the 2022 The Canvass Capitol Hill and K Street surveys on the true issues driving Washington

Methodology



Online Surveys:

- The Canvass Capitol Hill: Survey of Capitol Hill chiefs of staff, legislative directors, communications directors, press secretaries, and staff directors
- Conducted in February, March, May, July, September, and November 2022
- The Canvass K Street: Survey of senior K Street leaders from across the corporate, lobbying, trade association, non-profit, and think tank industries
- Conducted in April, June, August, and October 2022

Summary of Key Findings

1 The Canvass Capitol Hill and K Street are **PREDICTIVE** and have the pulse of the voters.

2 The Canvass forecasted a challenging but **PRODUCTIVE** legislative year.

3 The next Congress is expected to focus on **INFLATION and TECH REGULATION**.

4 The Canvass respondents believe there is a **GAP** between President Biden's achievements and his communication.

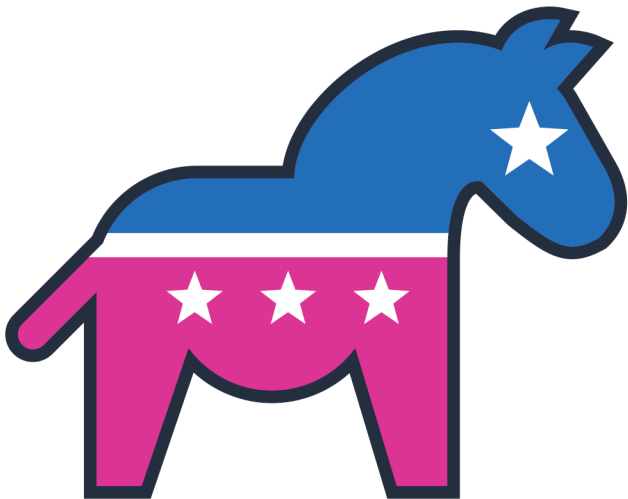
5 Democrats have become more **UNITED**, while Republicans have grown more divided.

The Canvass Capitol Hill and K Street are PREDICTIVE



In September, Capitol Hill senior staffers **correctly PREDICTED** the outcome of the top 9 Senate races

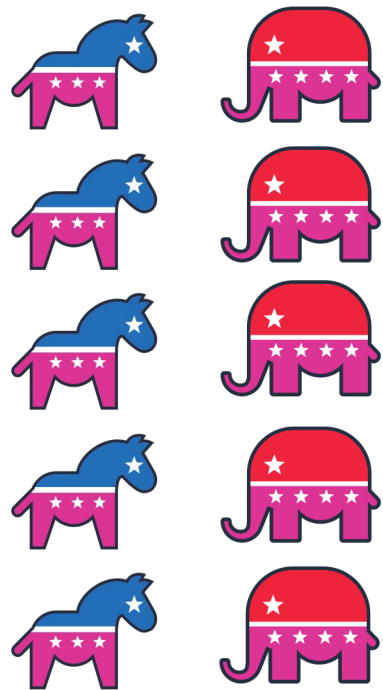
Which candidate (the Democrat or the Republican) do you believe will win each of the following Senate races? (OCTOBER 2022)



	DEM	GOP	DON'T KNOW
Arizona – Mark Kelly (D) , Blake Masters (R)	81%	12%	7%
Colorado – Michael Bennet (D) , Joe O’Dea (R)	80%	9%	11%
Florida – Val Demings (D), Marco Rubio (R)	3%	93%	5%
Georgia – Raphael Warnock (D) , Herschel Walker (R)	64%	30%	6%
Nevada – Catherine Cortez Masto (D) , Adam Laxalt (R)	60%	26%	14%
North Carolina – Cheri Lynn Beasley (D), Ted Budd (R)	6%	82%	12%
Ohio – Tim Ryan (D), J.D. Vance (R)	24%	64%	13%
Pennsylvania – John Fetterman (D) , Mehmet Oz (R)	74%	20%	6%
Wisconsin – Mandela Barnes (D), Ron Johnson (R)	26%	58%	16%

Likewise in October, K Street leaders **correctly PREDICTED** 9 of 10 top Senate races – only missing the closest race

Which candidate (the Democrat or the Republican) do you believe will win each of the following Senate races? (OCTOBER 2022)



	DEM	GOP	DON'T KNOW
Arizona – Mark Kelly (D) , Blake Masters (R)	93%	5%	2%
Colorado – Michael Bennet (D) , Joe O’Dea (R)	90%	6%	4%
Florida – Val Demings (D), Marco Rubio (R)	2%	96%	3%
Georgia – Raphael Warnock (D) , Herschel Walker (R)	66%	25%	9%
Nevada – Catherine Cortez Masto (D), Adam Laxalt (R)	36%	53%	11%
New Hampshire – Maggie Hassan (D) , Don Bolduc (R)	93%	4%	4%
North Carolina – Cheri Lynn Beasley (D), Ted Budd (R)	6%	85%	9%
Ohio – Tim Ryan (D), J.D. Vance (R)	24%	69%	7%
Pennsylvania – John Fetterman (D) , Mehmet Oz (R)	64%	27%	10%
Wisconsin – Mandela Barnes (D), Ron Johnson (R)	9%	85%	6%

In Feb, Democratic staffers' biggest threat was **swing voters going GOP**, while the **GOP's** was **far-right primary opponents**

Which of the following represents the largest threat to Democrats maintaining House and Senate majorities in the 2022 midterm elections? (FEBRUARY 2022)

DEMOCRATIC STAFFERS	DEM	HOUSE	SENATE
Swing voters favoring Republican congressional candidates more than Democrats	68%	71%	56%
Redistricting favoring Republicans	30%	26%	44%
Incumbents retiring	3%	3%	0%
Far-left primary opponents	0%	0%	0%

REPUBLICAN STAFFERS	GOP	HOUSE	SENATE
Far-right primary opponents	70%	69%	73%
Redistricting favoring Democrats	18%	21%	10%
Swing voters favoring Democratic congressional candidates more than Republicans	8%	8%	7%
Incumbents retiring	3%	1%	10%

After the midterm elections, both parties cited **EXTREME/WEAK GOP candidates most** for wins and losses in key races

Who or what do you credit most for winning/losing key Democratic/Republican races? (COMBINED CHOICE – TOP TWO)
(DEMOCRATIC STAFFERS) (NOVEMBER 2022)

	DEM
Extreme/weak GOP candidates	77%
Effective Democratic candidates	44%
The party focusing on the issues that mattered most to voters	37%
Strong Democratic voter turnout	32%
The DCCC and/or DSCC	7%
Redistricting favoring Democrats	2%
President Biden	1%
Strong fundraising	0%
Democratic-aligned Super PACs	0%
I don't know	0%

	GOP
Extreme/weak GOP candidates	81%
Former President Donald Trump	73%
The NRCC and/or NRSC	13%
Weak Republican voter turnout	10%
Negative or biased media coverage	8%
The party focusing on the issues that didn't matter most to voters	7%
Effective Democratic candidates	5%
Redistricting favoring Democrats	2%
Election integrity	1%
Weak fundraising	0%
Democratic-aligned Super PACs	0%
I don't know	0%

After the Dobbs decision, senior staffers consistently believed the **GOP would control the House and Dems would control the Senate**

Who do you believe will be in control of the **House of Representatives** after the 2022 elections? (JULY 2022)

	HOUSE	TOTAL	DEM	GOP	HOUSE	SENATE
Republicans		91% (+8%)	84% (+16%)	98% (-1%)	92% (+7%)	88% (+11%)
Democrats		9% (-8%)	16% (-16%)	2% (+1%)	8% (-7%)	12% (-11%)

Who do you believe will be in control of the **Senate** after the 2022 elections? (JULY 2022)

	SENATE	TOTAL	DEM	GOP	HOUSE	SENATE
Republicans		42% (-7%)	15% (-4%)	69% (-11%)	44% (-8%)	34% (-5%)
Democrats		58% (+7%)	85% (+4%)	31% (+11%)	56% (+8%)	66% (+5%)

K Street felt the same about control of Congress in August with a massive spike toward Democratic control of the Senate

Who do you believe will be in control of the **House** after the 2022 elections? (AUGUST 2022)

	TOTAL	DEM	GOP
Republicans	97% (-2%)	93% (-6%)	100% (+0%)
Democrats	3% (+2%)	7% (+6%)	0% (+0%)

Who do you believe will be in control of the **Senate** after the 2022 elections? (AUGUST 2022)

	TOTAL	DEM	GOP
Republicans	24% (-28%)	11% (-21%)	36% (-36%)
Democrats	76% (+28%)	89% (+21%)	64% (+36%)

K Street leaders also correctly predicted the most important midterm issues: **inflation, the economy, abortion, and crime**

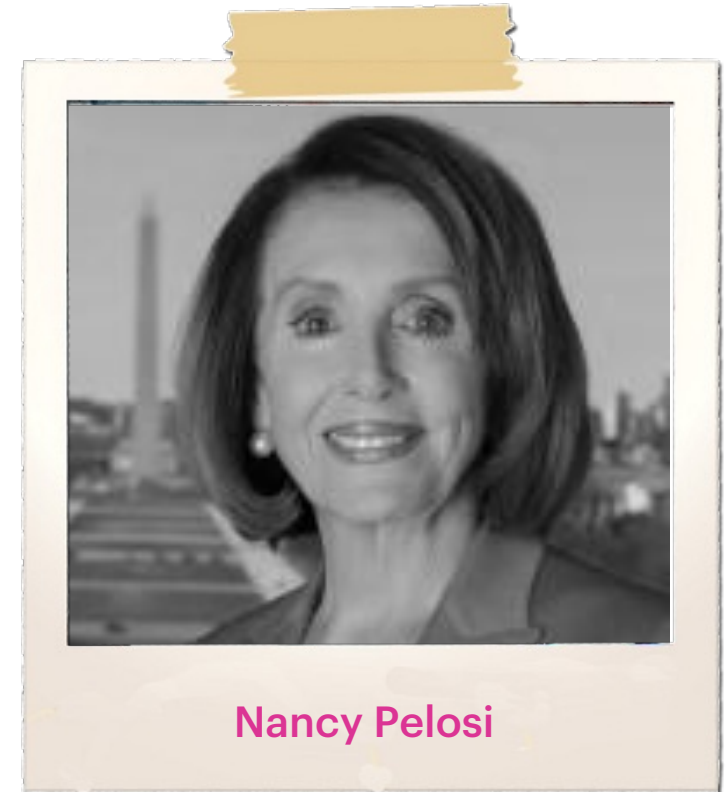
Which of the following issues do you believe will be MOST important to voters when considering who to vote for in the midterm elections? (COMBINED CHOICES – TOP THREE) (OCTOBER 2022)

	TOTAL	DEM	GOP
Inflation and rising cost of living	83%	79%	87%
The economy	72%	67%	78%
Abortion	59%	79%	40%
Crime and public safety	58%	46%	67%
Immigration	9%	6%	12%
Health care	5%	9%	2%
Energy	4%	2%	5%

In March, a majority of senior staffers across parties correctly believed Speaker Pelosi would **RETIRE** after this Congress

How confident are you that House Speaker Nancy Pelosi will retire after this Congress?

	TOTAL	DEM	GOP	HOUSE	SENATE
Very/ somewhat confident	54%	51%	57%	60%	39%
A little/not confident	38%	41%	35%	35%	46%
I don't know	8%	8%	7%	5%	14%



K Street leaders and Capitol Hill believed **Rep. Jeffries would be the next House Democratic leader after Speaker Pelosi**

Who do you believe is MOST likely to be the next House Democratic leader after Nancy Pelosi? (AUGUST 2022)

	TOTAL	DEM	GOP
Rep. Hakeem Jeffries	82% (-1%)	87% (+2%)	79% (-3%)
Rep. Steny Hoyer	5% (-2%)	3% (-4%)	6% (-1%)
Rep. Jim Clyburn	4% (-1%)	3% (+1%)	5% (-2%)
Rep. Adam Schiff	4% (+4%)	4% (+3%)	4% (+4%)
Rep. Katherine Clark	3% (+1%)	3% (+0%)	3% (+1%)
Rep. Pramila Jayapal	1% (+1%)	1% (+1%)	1% (+1%)



Capitol Hill May		
TOTAL	DEM	GOP
82%	85%	73%

THE TAKEAWAY

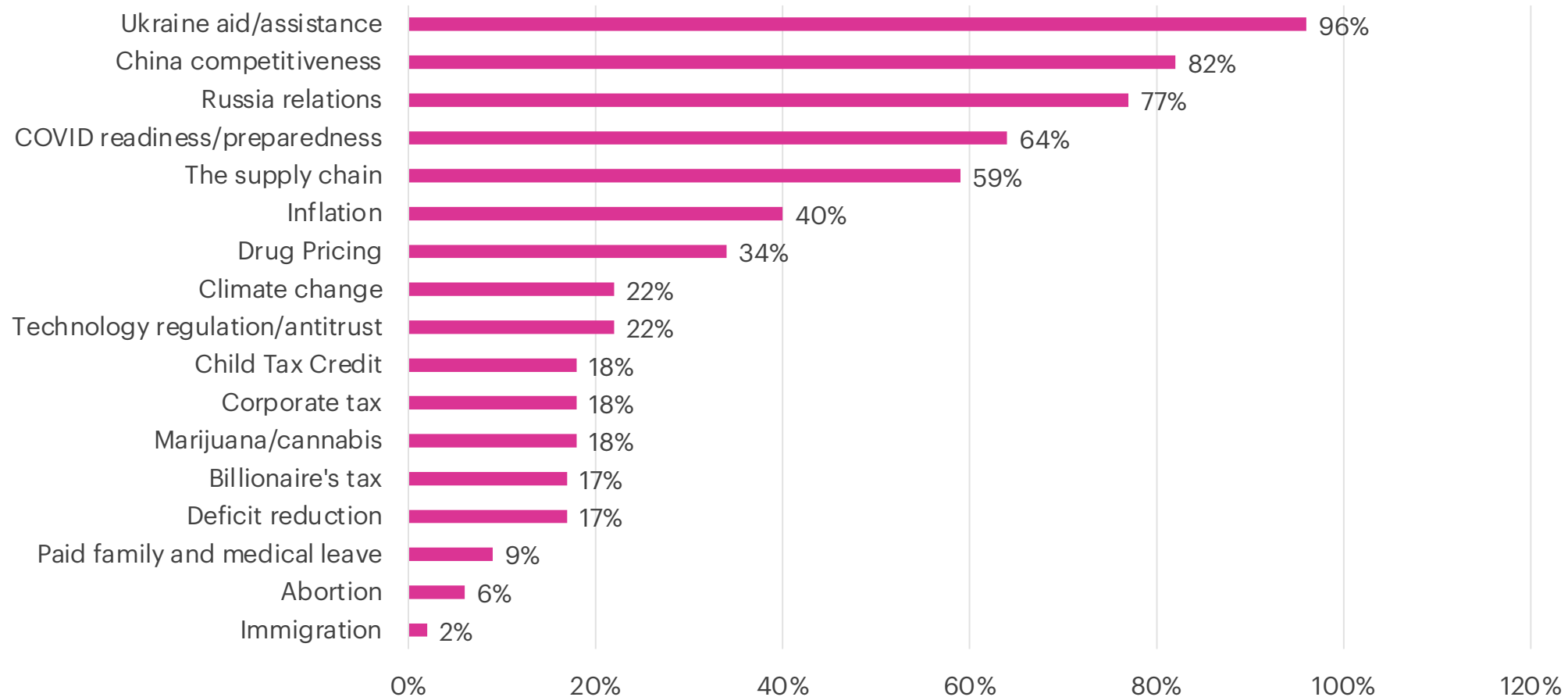
- While they are closely clustered across a few square miles of Washington D.C., Capitol Hill senior staffers and K Street leaders have **the pulse of American voters.**
- From predicting the outcome of specific elections to the reasons for winning or losing them, Capitol Hill senior staffers and K Street leaders **recognized the most likely outcomes** and shared them with Punchbowl News.
- Looking ahead to the next Congress, both Capitol Hill and K Street are telling us to **expect a far LESS productive federal legislature** except on a few key issues.



**The Canvass forecasted a
challenging but **PRODUCTIVE**
legislative year**

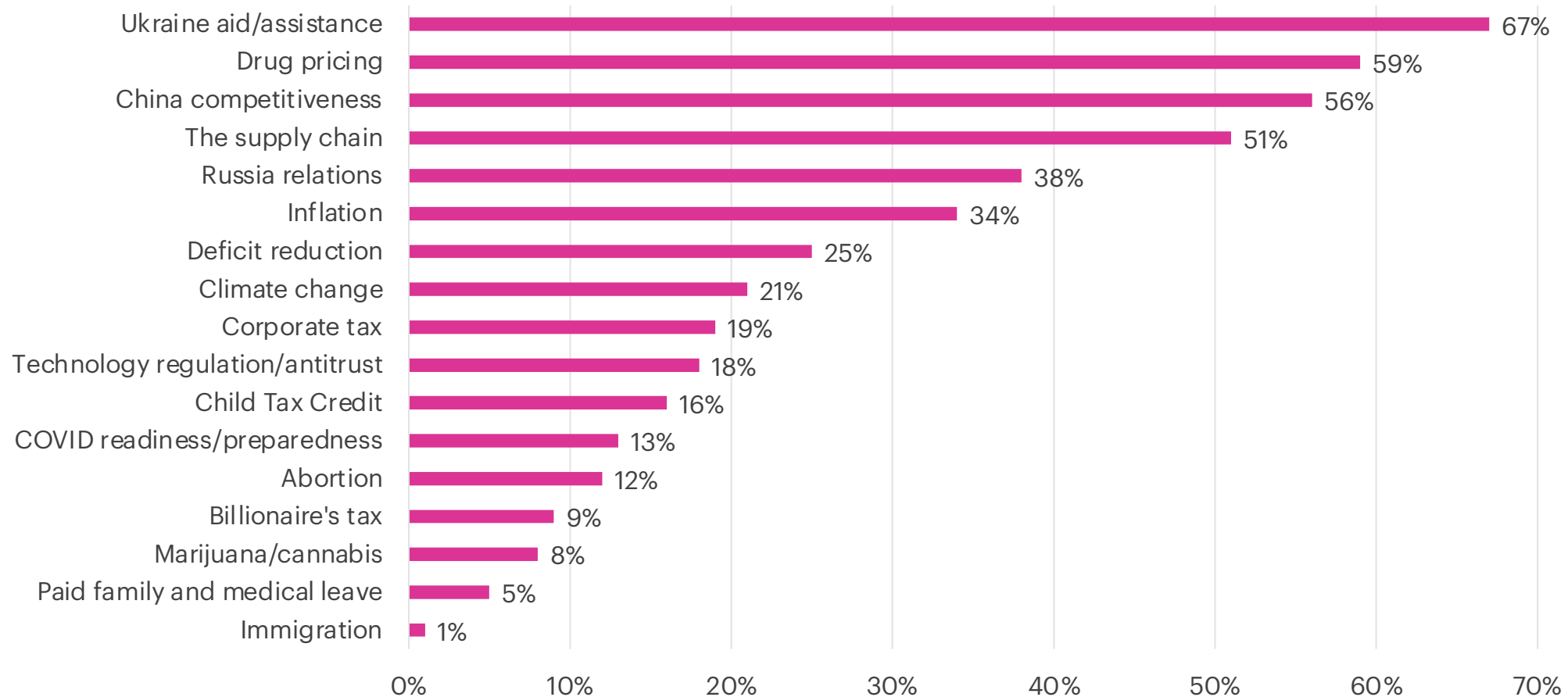
In May, staffers' top two most likely issues for Congress to address **Ukrainian aid and China competitiveness** both passed

How likely or unlikely is it that Congress will pass legislation this year to address the following issues? (LIKELY) (MAY 2022)



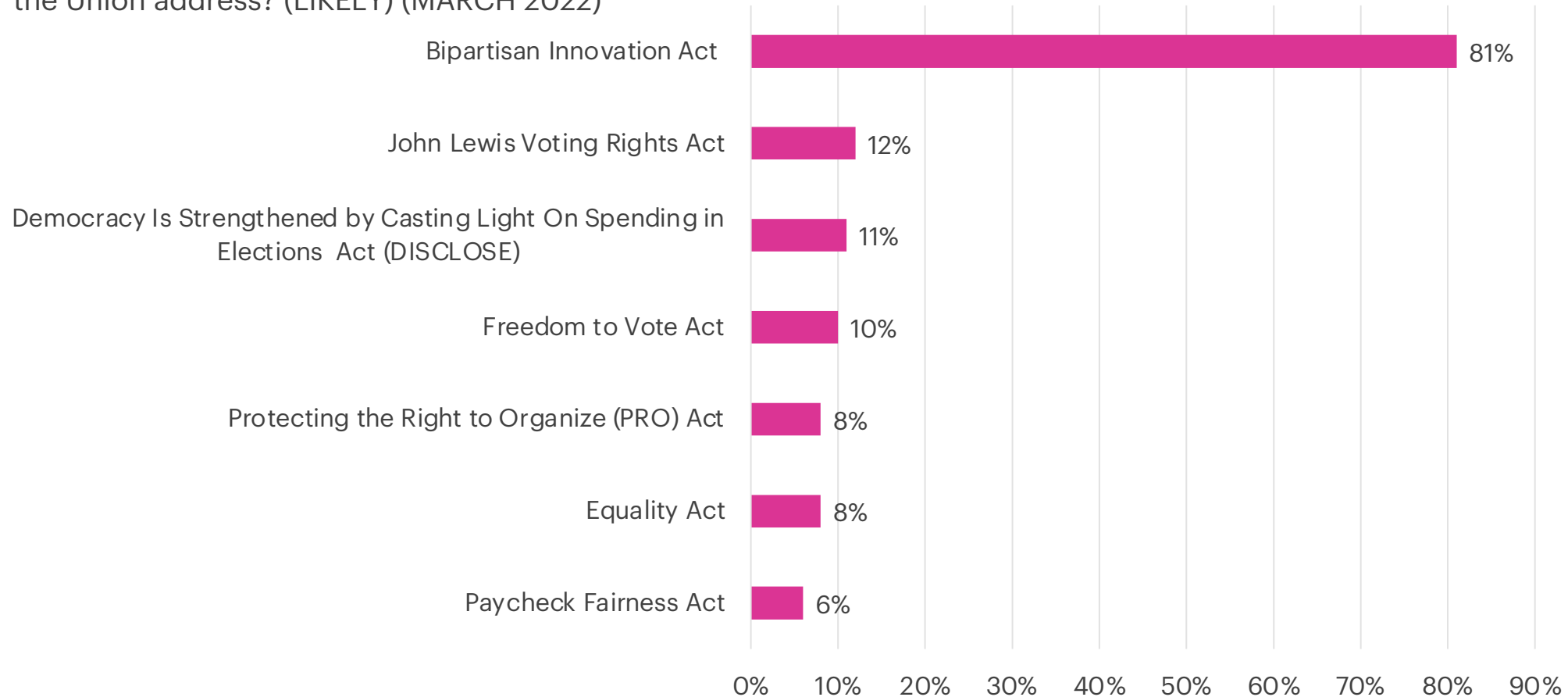
Two months later, **drug pricing** was correctly recognized as likely to pass as well

How likely or unlikely is it that Congress will pass legislation this year to address the following issues? (LIKELY) (JULY 2022)



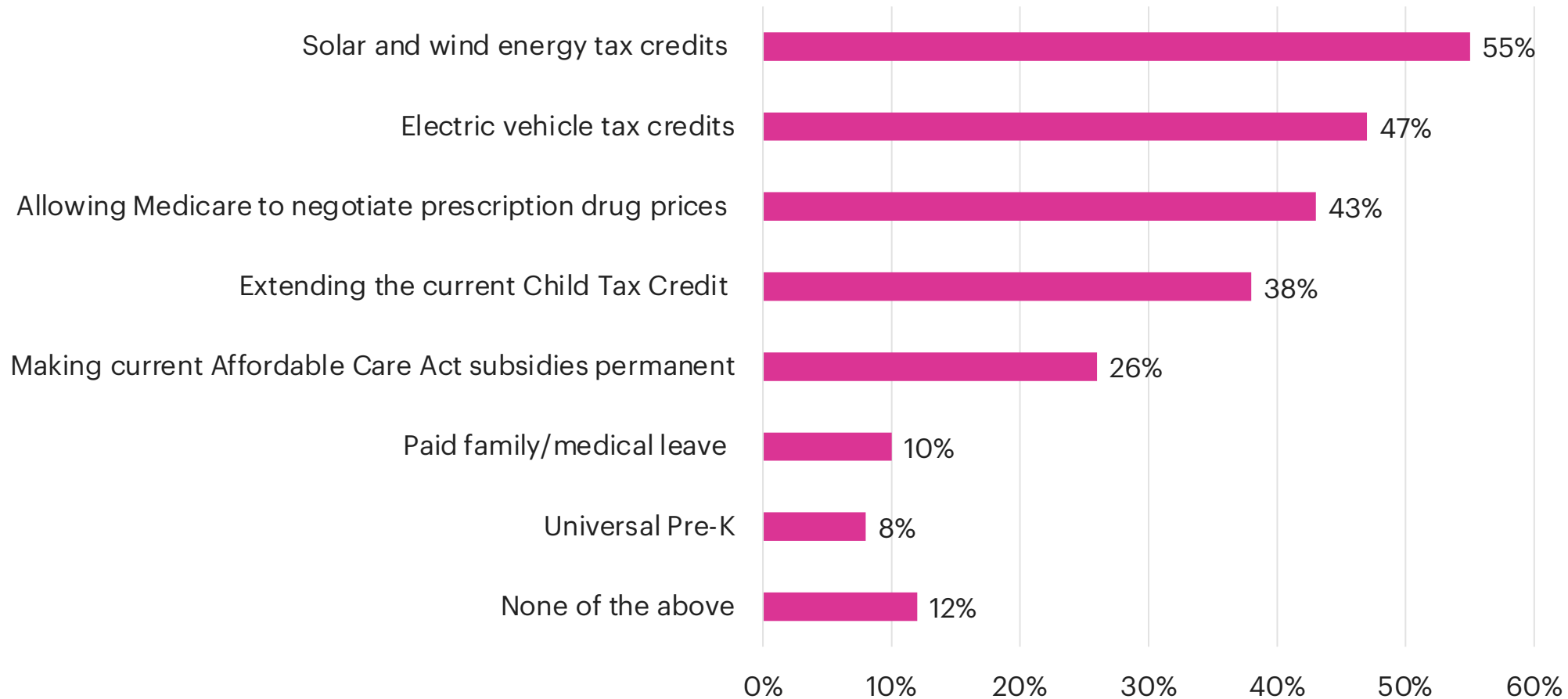
Staffers correctly predicted the only bill Biden mentioned in his SOTU likely to pass was the **Bipartisan Innovation Act**

How likely or unlikely is it that Congress will pass each of the following bills that President Biden mentioned in his State of the Union address? (LIKELY) (MARCH 2022)



K Street also foresaw many BBB issues passing including **clean energy tax credits, Medicare Rx negotiation, and ACA subsidies**

Which of the following components of the Build Back Better bill are MOST likely to be repackaged into different legislation and passed by this Congress? (APRIL 2022)



Most senior staffers also correctly understood Congress was **UNLIKELY** to pass federal abortion rights legislation

A leaked majority draft opinion indicates that the Supreme Court may be weeks or months away from overturning Roe v. Wade. How likely or unlikely do you believe it is that this Congress will pass federal abortion rights legislation? (MAY 2022)

	TOTAL	DEM	GOP	HOUSE	SENATE
Likely	6%	9%	4%	7%	5%
Neither/I don't know	1%	3%	0%	2%	0%
Unlikely	92%	89%	96%	91%	95%

THE TAKEAWAY

- While many assumed the provisions within BBB were dead when initial negotiations fell apart in early 2022, Capitol Hill and K Street were both reporting through The Canvass that **these issues were very much alive** all year.
- They also correctly recognized what issues were **NOT likely to pass**, including abortion rights protections that many believed would be passed after the Dobbs decision.
- The Canvass largely **predicted which industries and special interests would win on the Hill and who would lose.**



The next Congress should focus on **INFLATION** and **TECH REGULATION**

Capitol Hill and K Street agree the next Congress will be **LESS effective** at passing meaningful legislation than the current one

Looking ahead to the next Congress, do you believe it will be more or less effective at passing meaningful legislation as the current one? (JULY 2022)



July 2022 Edition

	TOTAL
MORE EFFECTIVE (NET)	29%
Neither/I don't know	18%
LESS EFFECTIVE (NET)	53%



June 2022 Edition

	TOTAL
MORE EFFECTIVE (NET)	16%
Neither/I don't know	24%
LESS EFFECTIVE (NET)	60%

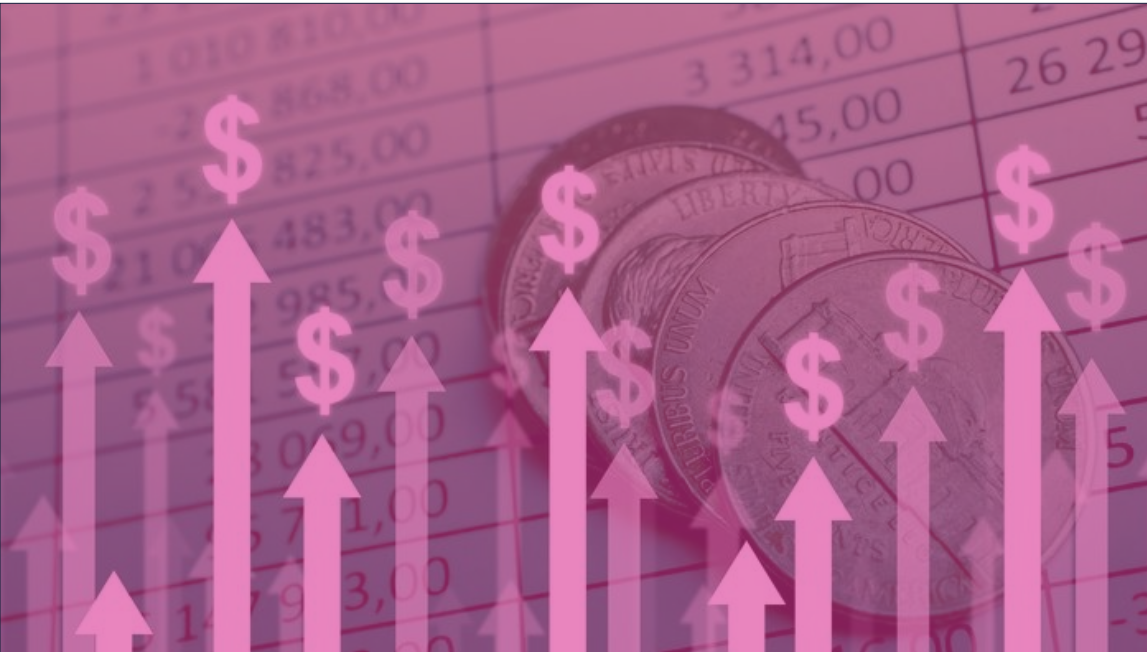
But the two issues most senior staffers think the next Congress is likely to address: **inflation and tech regulation**

Which of the following issues are MOST likely to be addressed by the next Congress? (COMBINED CHOICE – TOP THREE)
(NOVEMBER 2022)

	TOTAL	DEM	GOP
Inflation and rising cost of living	60%	48%	73%
Regulating tech and social media companies	56%	59%	54%
Crime and public safety	47%	44%	41%
Regulating the cryptocurrency industry	37%	41%	34%
Funding the war in Ukraine	35%	41%	28%
Immigration	26%	16%	37%
Taxes	24%	33%	14%
Abortion	8%	14%	2%
Health care	6%	5%	8%

In August, the majority of K Street leaders believed inflation would continue to **RISE** this year – and they were right

Do you think the rate of inflation will continue to rise through the end of the year? (AUGUST 2022)



	TOTAL	DEM	GOP
Yes	55%	37%	73%
No	35%	52%	19%
I don't know	10%	11%	8%

K Street leaders also believe it's **LIKELY** the next Congress will pursue antitrust legislation against a major technology company

How likely or unlikely is it that the next Congress will pursue antitrust legislation against a major technology or social media company? (AUGUST 2022)

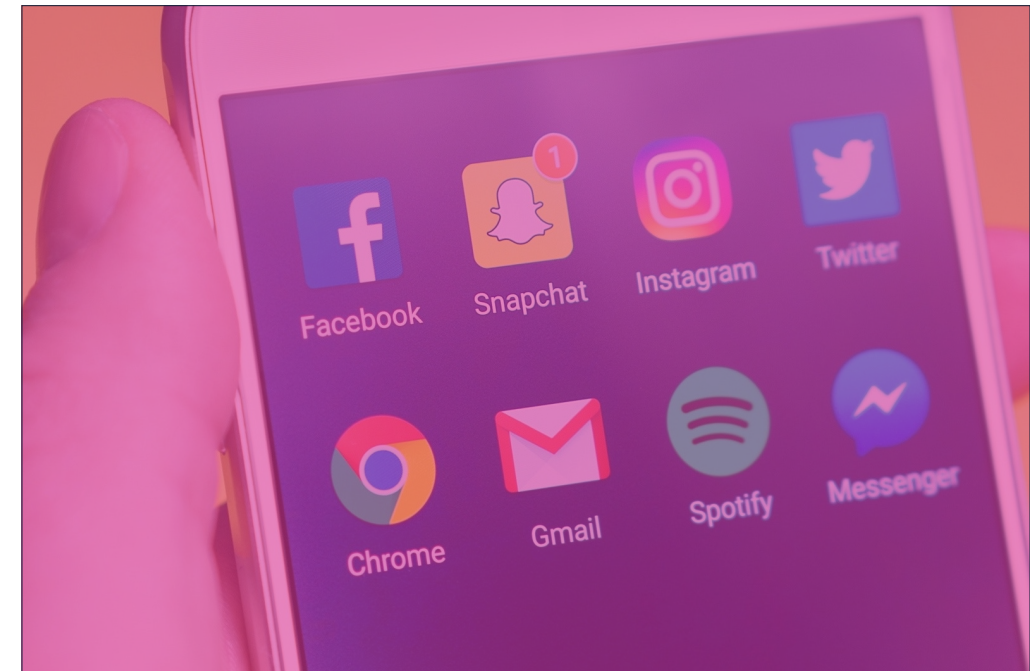


	TOTAL	DEM	GOP
LIKELY (NET)	55%	49%	60%
Neither/I don't know	10%	11%	10%
UNLIKELY (NET)	35%	40%	29%

Capitol Hill believes **TikTok and Facebook/Meta** are most likely to be scrutinized and more heavily regulated

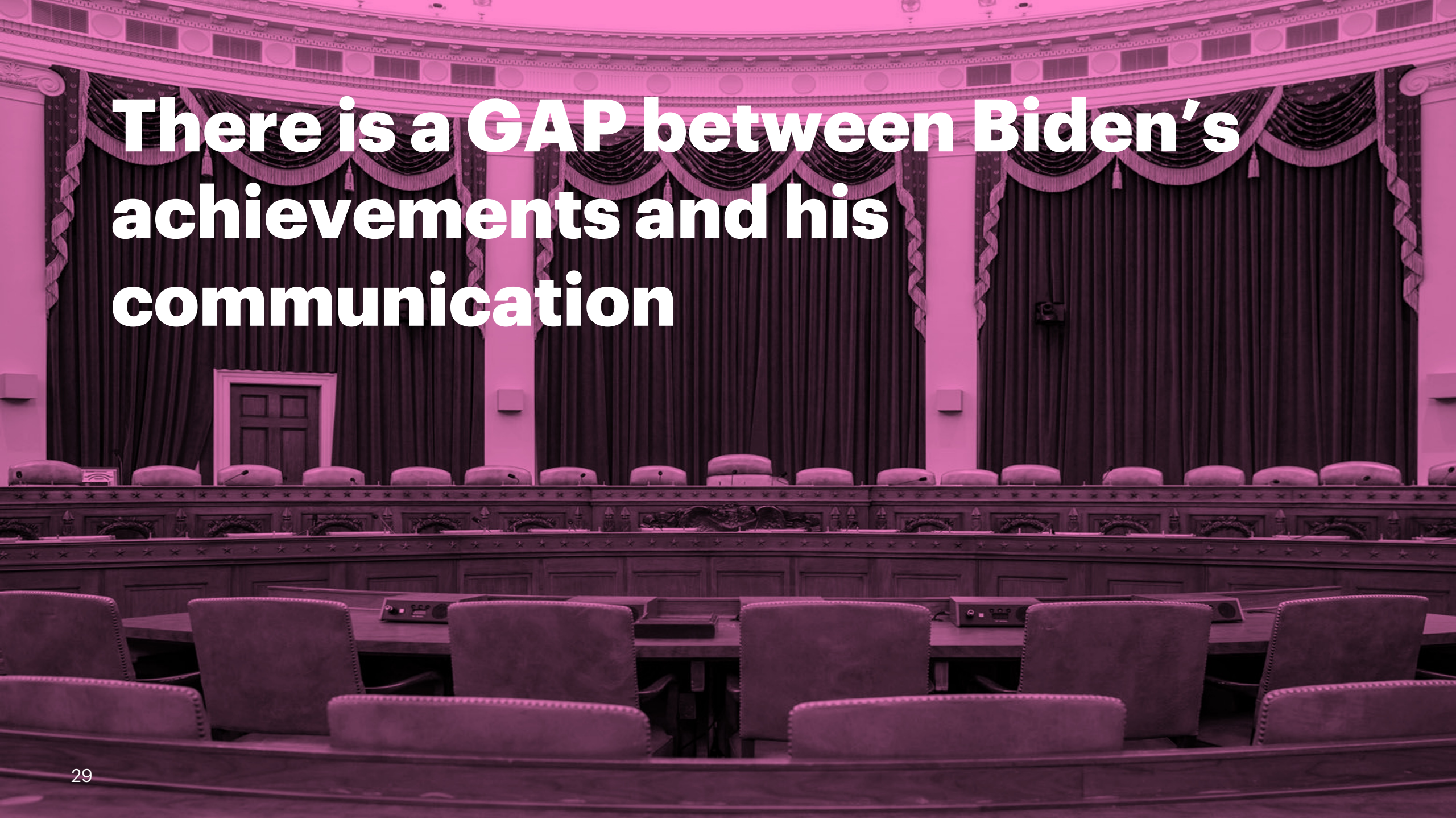
Which of the following tech and social media companies are MOST likely to be scrutinized and more heavily regulated during the next Congress? (COMBINED CHOICE – TOP TWO) (NOVEMBER 2022)

	TOTAL	DEM	GOP
Tik Tok	65%	61%	69%
Facebook/Meta	62%	61%	64%
Twitter	39%	47%	30%
Google/Alphabet	18%	11%	25%
Amazon	10%	15%	5%
Apple	3%	4%	3%
Microsoft	0%	0%	0%
Other	2%	1%	2%



THE TAKEAWAY

- Most do **NOT believe the next Congress will be as effective as the outgoing one**, but there are a few issues where The Canvass respondents are optimistic Democrats and Republicans can find common ground.
- Early indications are that **tackling inflation and regulating tech and social media companies** are key areas where both parties can find common ground.
- Regulation of the cryptocurrency industry was also the 4th most likely issue The Canvass Capitol Hill predicted to occur in the next Congress – **before the collapse of FTX! We will probe on whether this likelihood has increased early in 2023.**



There is a GAP between Biden's achievements and his communication

In April 2022, a majority of K Street leaders believed the Biden administration has been **UNSUCCESSFUL** so far

How would you evaluate the overall performance of the Biden administration so far? (APRIL 2022)

	TOTAL	DEM	GOP
SUCCESSFUL (NET)	36%	60%	12%
Neither/I don't know	12%	16%	7%
UNSUCCESSFUL (NET)	52%	24%	81%

An early indication was in Feb when most senior staffers called the Administration's handling of omicron **UNSUCCESSFUL**

How would you evaluate the Biden administration's handling of the omicron variant and surge in cases since December?
(FEBRUARY 2022)

	TOTAL	DEM	GOP
SUCCESSFUL (NET)	31%	60%	2%
Neither/I don't know	10%	16%	3%
UNSUCCESSFUL (NET)	59%	24%	96%

In August, most K Street leaders reported the Biden administration had been **INEFFECTIVE** at lowering gas prices



How effective or ineffective have the Biden Administration's efforts to lower gas prices been? (AUGUST 2022)

	TOTAL	DEM	GOP
EFFECTIVE (NET)	25%	45%	6%
Neither/I don't know	22%	33%	11%
INEFFECTIVE (NET)	53%	22%	83%

Capitol Hill and K Street **AGREED** the Biden Admin had been **INEFFECTIVE** at communicating its efforts to reduce inflation – including a majority of Democrats

How effective or ineffective does the member of Congress you work for believe the Biden administration has been in communicating its plans and efforts to reduce inflation? (JULY 2022)

	TOTAL	DEM	GOP	HOUSE	SENATE
EFFECTIVE (NET)	7%	13%	1%	6%	10%
Neither/I don't know	6%	13%	0%	8%	3%
INEFFECTIVE (NET)	86%	74%	99%	86%	87%



How effective or ineffective do you believe the Biden administration has been in communicating its plans and efforts to reduce inflation?

	TOTAL	DEM	GOP
EFFECTIVE (NET)	5%	7%	3%
Neither/I don't know	6%	7%	3%
INEFFECTIVE (NET)	90%	86%	93%

THE TAKEAWAY

- Despite a prolific first two years featuring several major pieces of legislation becoming law – from **infrastructure and high-tech manufacturing investments to gun control and Build Back Better Lite, among others** – Biden still struggles to be seen by many as successful.
- The Canvass has been telling us for months that **Biden's biggest challenge isn't policy; it's messaging and communication.**
- There are **MORE Democrats in agreement that Biden's communication on key issues has been INEFFECTIVE** than actually consider his term a success so far.

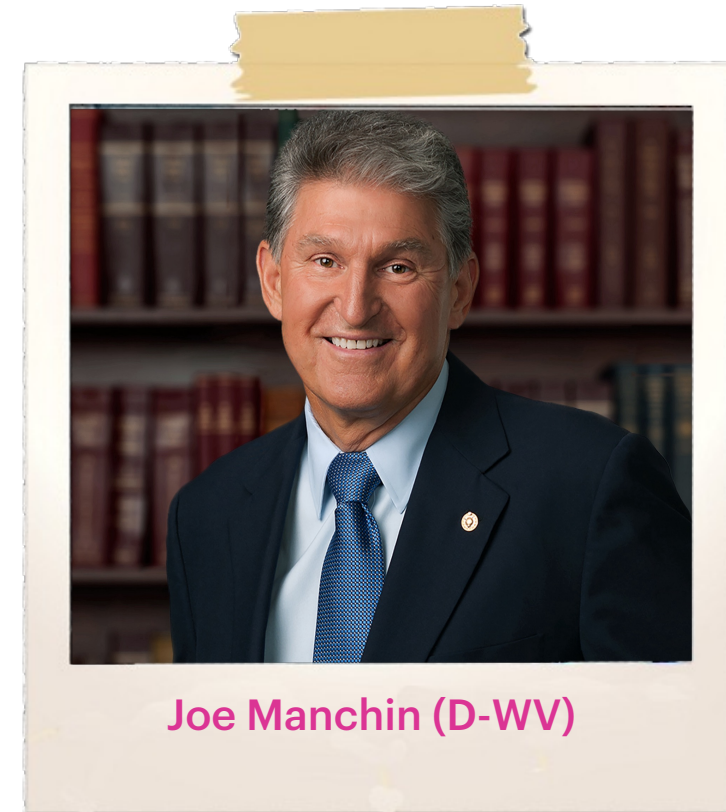


**Democrats are more UNITED,
while the GOP is more divided**

In February, Democratic staffers were blaming **Joe Manchin** most for the failure of BBB with little hope he'd come around

Who is primarily to blame for the failure to pass Build Back Better? (COMBINED CHOICE – TOP TWO) (DEMOCRATIC STAFFERS)

	DEM
Joe Manchin	81%
Kyrsten Sinema	49%
Congressional Republicans	24%
Chuck Schumer	23%
The Biden Administration	20%
Nancy Pelosi	4%



They also did **NOT** believe Sens. Manchin and Sinema negotiated in good faith on **BBB**

Do you believe Joe Manchin and Kyrsten Sinema negotiated in good faith with Senate Democratic leaders and Biden on Build Back Better? (DEMOCRATIC STAFFERS) (FEBRUARY 2022)

	DEM
Yes	22%
No	56%
I don't know	21%

By September, Democrats believed they had **GAINED** momentum, while Republicans believed they had **LOST** it

Do you believe the Democratic Party has regained momentum over the last two months heading into the midterm elections? (DEMOCRATIC STAFFERS) (SEPTEMBER 2022)

GAINED	DEM
Yes	99%
No	1%
I don't know	0%

Do you believe the Republican Party has lost momentum over the last two months heading into the midterm elections? (REPUBLICAN STAFFERS) (SEPTEMBER 2022)

LOST	GOP
Yes	70%
No	28%
I don't know	2%

Dobbs was most responsible for building/losing momentum for both parties while the GOP also cited extreme candidates

Which of the following do you believe is the MOST important factor behind the **Democratic Party's renewed momentum** heading into the midterm elections? (COMBINED CHOICE – TOP TWO) (DEMOCRATIC STAFFERS) (SEPTEMBER 2022)

	DEM
The Dobbs decision repealing Roe v. Wade	96%
Passage of the Inflation Reduction Act	33%
Lower gas prices	31%
Extreme GOP candidates	29%
Student loan forgiveness	6%
The Mar-a-Lago raid	2%
The January 6 hearings	2%
Joe Biden hitting the campaign trail	0%

Which of the following do you believe is the MOST important factor behind the **Republican Party losing momentum** heading into the midterm elections? (COMBINED CHOICE – TOP TWO) (REPUBLICAN STAFFERS) (SEPTEMBER 2022)

	GOP
The Dobbs decision repealing Roe v. Wade	92%
Extreme GOP candidates	52%
Lower gas prices	42%
The Mar-a-Lago raid	6%
Passage of the Inflation Reduction Act	5%
The January 6 hearings	1%
Student loan forgiveness	1%
Joe Biden hitting the campaign trail	0%

Today, a majority of Democrats believe their party is **UNITED**, while a majority of Republicans believe the **GOP** is **DIVIDED**

How divided or united does the member of Congress you work for believe the Democratic Party is? (DEMOCRATIC STAFFERS)
(NOVEMBER 2022)

	DEM
UNITED (NET)	88%
Neither/I don't know	4%
DIVIDED (NET)	8%

How divided or united does the member of Congress you work for believe the Republican Party is? (REPUBLICAN STAFFERS)
(NOVEMBER 2022)

	GOP
UNITED (NET)	35%
Neither/I don't know	14%
DIVIDED (NET)	51%

Rick Scott was the only party chairman of a campaign committee that a majority of his own party believes was **INEFFECTIVE**

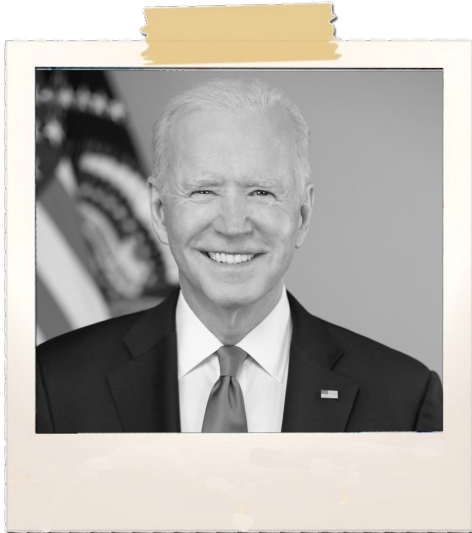
How effective or ineffective does the member of Congress you work for believe that Tom Emmer was in chairing the NRCC? (REPUBLICAN STAFFERS) (NOVEMBER 2022)

TOM EMMER	GOP
EFFECTIVE (NET)	67%
Neither/I don't know	26%
INEFFECTIVE (NET)	8%

How effective or ineffective does the member of Congress you work for believe that Rick Scott was in chairing the NRSC? (REPUBLICANS) (NOVEMBER 2022)

RICK SCOTT	GOP
EFFECTIVE (NET)	11%
Neither/I don't know	32%
INEFFECTIVE (NET)	57%

While few Democratic members oppose Biden running, most GOP members **OPPOSE** Trump running for POTUS in 2024



Does the member of Congress you work for believe President Joe Biden should run for reelection in 2024? (DEMOCRATIC STAFFERS) (NOVEMBER 2022)

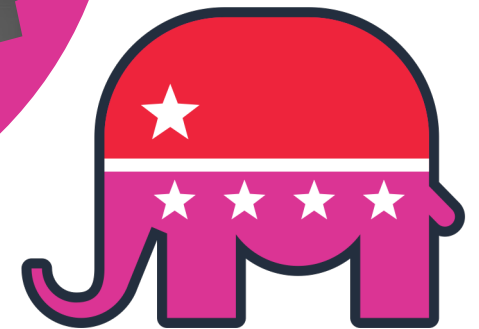
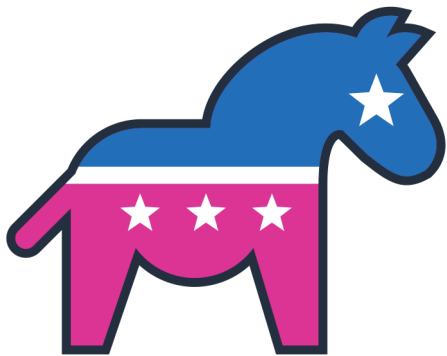
	DEM
Yes	44%
No	11%
I don't know	45%



Does the member of Congress you work for believe former President Donald Trump should run for election again in 2024? (REPUBLICAN STAFFERS) (NOVEMBER 2022)

	GOP
Yes	4%
No	67%
I don't know	29%

If not Biden and Trump, senior staffers agree with K Street leaders that the 2024 presidential race will be between **BUTTIGIEG** and **DESANTIS**



THE TAKEAWAY

- The Democratic Party kicked off 2022 **at war with two key members of its Senate caucus** and their signature legislation, Build Back Better, in peril.
- Despite entering 2022 with momentum at their backs, the **Republicans UNDERPERFORMED in the midterms** thanks to a combination of contentious Supreme Court cases, unpopular Senate candidates, and former President Trump – all of which Democrats were able to exploit to their advantage.
- Politics can change **QUICKLY**. The Canvass Capitol Hill and The Canvass K Street participants both recognized when the momentum was shifting and provided unique, predictive insight into how legislation and the elections would be impacted.
- As for 2024, if each party decides to toss their most recent president aside, then there's majority consensus across each that **Pete Buttigieg and Ron DeSantis** will be asked to (try and) unite their parties.

PUNCHBOWL NEWS'

THE

 **CANVASS**

POWERED BY LOCUST STREET GROUP