

# THE CANVASS 2025 YEAR IN REVIEW



The Canvass surveyed Capitol Hill senior staffers and K Street senior leaders about the key issues driving Washington. From legislative priorities to election forecasting, this survey focused on some of the biggest issues confronting Congress and the nation. What follows are our top four takeaways from The Canvass 2025.

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

- 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.
- 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 (**75%**) in November said they are **CONCERNED** that layoffs among some of America's largest companies will continue and become more widespread.



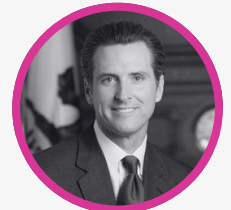
## 2 The shutdown came as no surprise, but **NEITHER** party won the messaging war.

- The Canvass saw the shutdown and political gridlock coming well before it arrived. Back in February, most Capitol Hill respondents (**56%**) 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, the following is **MOST** likely to pass: crypto market structure reform (**56%**), tariff relief for farmers (**56%**), energy permitting reform (**52%**), the Farm Bill (**51%**).



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

- Throughout 2025, insiders consistently named **California Gov. Gavin Newsom** as the **MOST influential** Democrat in national politics. His standing grew as the year went on, even while Democratic staff and K Street respondents described the Democratic 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.



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

- 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.
- As of November, most Capitol Hill respondents believe the **DEMOCRATS (78%)** are in a stronger position entering the campaign season ahead of the 2026 midterm elections - including most Republican staffers (**62%**). Most Canvass respondents expect the GOP to **MAINTAIN** control of the Senate in 2026, but respondents have increasingly said the House is likely to **FLIP**.



## METHODOLOGY

- **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 2024
- **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 2024
- **The Canvass Inauguration Special Edition:** Survey of senior K Street leaders and Capitol Hill senior staff conducted online by LSG in January