

Sentiment, Web-Based Data Collection, and Partisanship

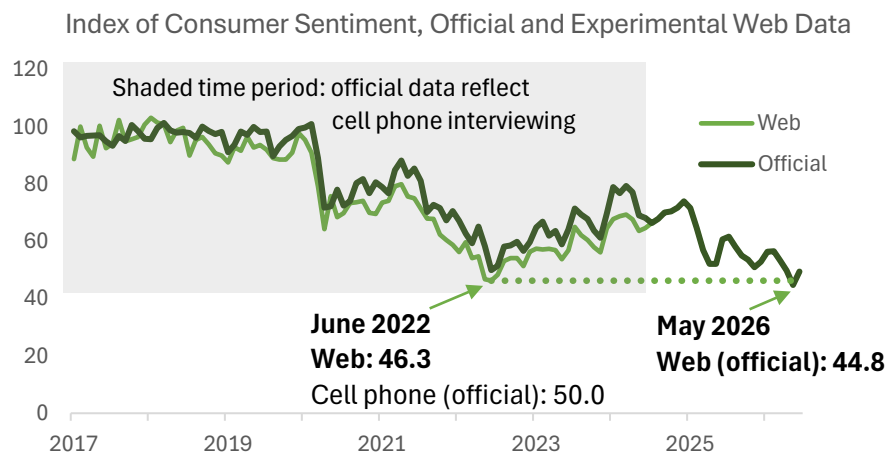
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Joanne Hsu, PhD, Director

Recent trends in sentiment show that consumers hold broadly negative views of the economy. Sentiment reached a historic low this May, which was just below the previous all-time low that was reached only four years ago in June 2022, when inflation peaked at highs not seen in decades. Data users may be curious whether these low readings are driven by the methodological transition to web interviewing that occurred mid-2024, or methodologically driven changes in the political composition of survey respondents. The [transition followed seven years of experimental web data collection](#) alongside the official data that was collected via cell phone, which facilitates a methodologically consistent contextualization of current sentiment and respondent political identification against the historical data. This special report follows up on [Partisan Perceptions and Sentiment Measurement](#) (April 2025) and highlights several important patterns:

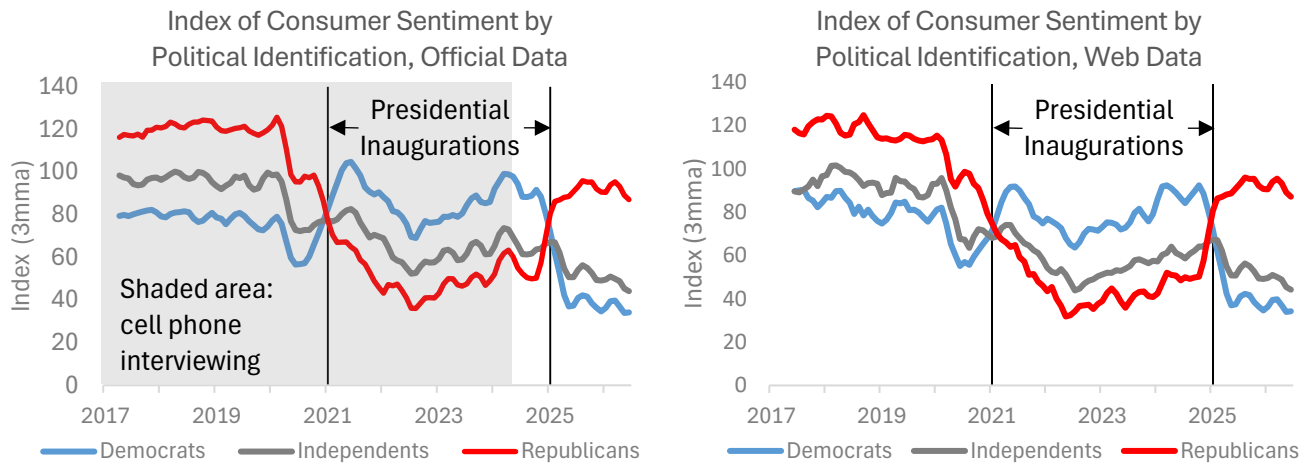
- The May 2026 sentiment reading would still be lower than the historical June 2022 trough whether compared to the official cell-phone reading, or the experimental web reading which employed the same methodology currently in use.
- Sentiment trends by self-reported political party are nearly identical in data collected via random digit dial sampling (RDD) cell phone and address-based sampling (ABS) web interviewing. With web interviewing, independents appear to slightly lean toward the sentiment of opposition parties under Democratic and Republican presidents alike. Under both methods, ignoring partisan respondents and [focusing on independents alone yields estimates for sentiment \(and other headline variables\) that are completely aligned with national estimates](#).
- A decrease in the share of self-identified Republicans in the survey sample began after the 2025 presidential transition and is not driven by the adoption of web interviewing that occurred the year prior; decreases are visible in comparison to historical web interviewing data as well. These changes in the distribution of political preferences on the survey are consistent with research from Gallup showing that [political preferences in the US shifted to the left in 2025](#), and that [Democrats gained an edge in party affiliation in 2026](#).
- Unlike the malleability of individual self-reported political identification, political preferences of smaller geographic areas are more stable and can be used to determine if residents of red or blue areas are disproportionately represented. Under web interviewing, the proportion of respondents living in blue, red, and swing counties closely matches the US population distribution; residents of red counties continue to be well-represented in the surveys.

(1) Historical data collected via web interviewing show that the May 2026 consumer sentiment reading is indeed below June 2022 and the lowest in the history of the web data collection



The figure above plots sentiment from 2017 onward from the experimental web data collection (light green line) and the official data collection (dark green line), showing how recent readings compare to the historical data using the same method; the two methods exhibit a correlation of 0.97. The May 2026 reading was 44.8 and, as many noticed, lower than the official June 2022 reading of 50.0. It is also lower than the June 2022 web reading that was 46.3, marked in the horizontal dotted line for a visual comparison to the present. Therefore, even a methodologically consistent comparison shows that sentiment in May 2026 was lower than the June 2022 trough as well as all other readings since experimental web data collection began in 2017. **The fact that May 2026 is lower than June 2022 is thus not an artifact of web interviewing.**

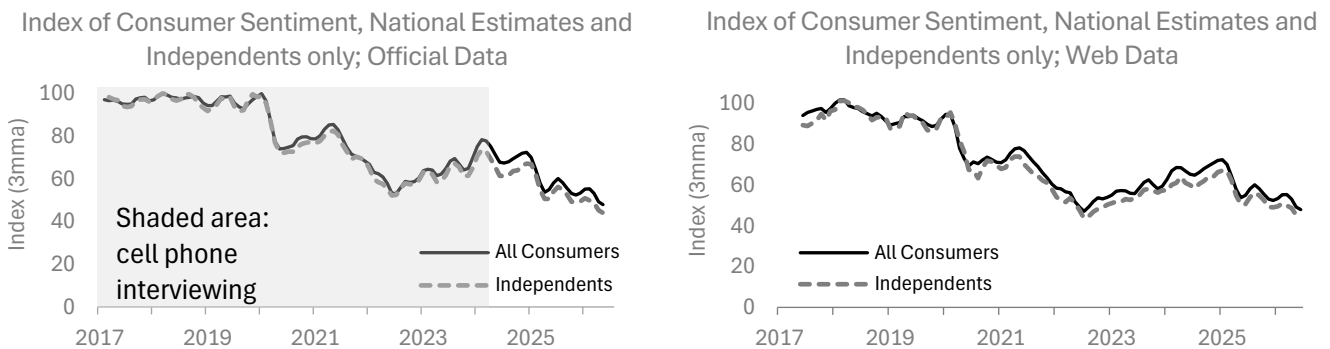
(2) Partisan differences in sentiment are nearly identical in cell phone and web-based interviews. Similarly low sentiment readings were seen among self-identified Democrats in May 2026 during a Republican presidency and self-identified Republicans in June 2022 under a Democratic presidency.



Historically, the interviews asked about political affiliation a few times times per administration, increasing to a monthly frequency starting in February 2017 in the official data. Figure 2 above displays sentiment by self-reported political party, separately for official data (left) and for the web data (right). Note that prior to 2024, the sample sizes for web data were much smaller than the official data. Both charts look remarkably similar; sentiment of consumers whose party is in the White House is consistently higher than those whose party is not, with independents in the middle, consistent with patterns dating back to at least the Reagan administration. When the White House changes parties, the relative position of sentiment of the two parties switches as well, again with independents consistently in the middle. Under web interviewing, independents appear to slightly lean toward the sentiment of opposition parties; this is the case under presidents of both parties.

Looking at consumers whose party was not in the White House during the May 2026 and June 2022 troughs, similar patterns were seen whether the earlier data point is drawn from the official cell phone or the web data. Democrats' sentiment in May 2026 (32.8) was comparable to that of Republicans in June 2022 (web 31.3; official/phone 33.0). The May 2026 sentiment of independents (40.6) was a bit below their June 2022 reading (40.7 web; a bit higher on phone 48.5 but still a trough). Republican sentiment in May 2026 (84.6) was higher than that of June 2022 Democrats, whether comparing to phone (66.4) or web (62.8).

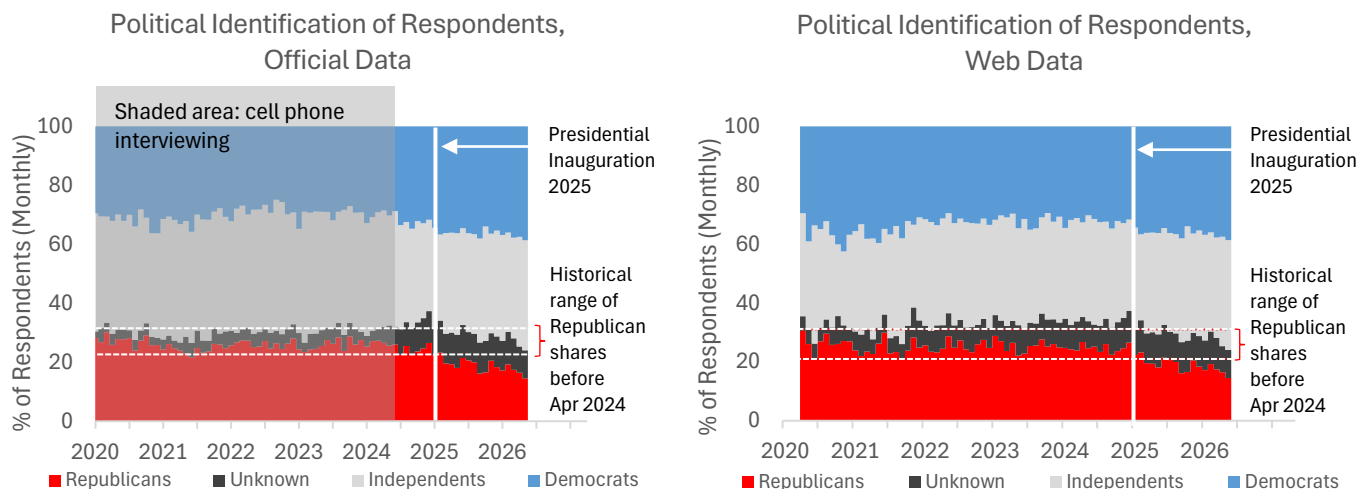
(3) National estimates have historically been, and remain, fully aligned with estimates based on independents alone



Despite large partisan differences in sentiment, whether measured via cell phone (figure 3 above, left) or web (right) [national estimates are consistently aligned with that of independents](#), a group that is less likely to be influenced by partisan extremes. This consistent alignment shows that national trends, regardless of mode, capture meaningful changes

in overall consumer views of the economy. National estimates are not dominated by one end or the other of the political spectrum.

(4): The 2025 decline in shares of respondents identifying as Republicans is visible even when looking at historical data collected via web; shares only fall below historical ranges after the change in the presidential administration, well after the 2024 methodological transition, and may reflect underlying shifts in the population



The share of self-identified Republicans in the survey has recently fallen, but this decrease largely began after the 2025 presidential transition and is not driven by the adoption of web interviewing; decreases are visible in historical web data as well. The methodological transition occurred between April and June 2024, and publication of web-only data began the following month. Figure 4 above displays the weighted shares of respondents identifying themselves as Republicans, Democrats, independents, or no response. The left chart reflects the official data, while the right chart reflects data collected via web interviews. For both charts, July 2024 onward (after the completion of the methodological transition) reflects the same data. The historical range of Republican shares of respondents prior to April 2024 (when the methodological transition began) are marked between the dotted lines.

First, note that whether we look at the the cell-phone interviewing conducted in the official data prior to April 2024 (when the methodological transition began), or the experimental web-based interviewing, the historical ranges of Republican shares (horizontal white dotted lines) are nearly identical: about 21 to 31% for web interviewing, and slightly narrower 23 to 29% for cell phone interviewing, which likely reflects the much larger sizes of the official data collection. **Historically, web interviewing does not inherently yield substantially lower shares of self-identified Republicans in the sample than cell phone interviewing.**

Second, the primary difference between web- and cell phone-based interviewing is the greater share of respondents who do not provide a political affiliation (dark gray bars). Prior to April 2024, 2 to 6% of cell phone respondents have missing affiliations, compared with 5 to 10% of web respondents. In the past two years of web interviewing, 10% of respondents on average do not provide a political affiliation. Under both modes, this group is a mix of respondents who are asked the political questions but choose not to respond, or respondents who exit the survey prior to the demographic questions at the end of the interview.¹ Concurrently, the historical web data show somewhat lower shares of independents than cell phone

¹ Note that during telephone interviews, respondents who completed the sentiment questions rarely exited before the political and demographic questions at the end of the interview.

interviewing. Note that independents and respondents with unknown political identification form the plurality of respondents under both forms of interviewing.

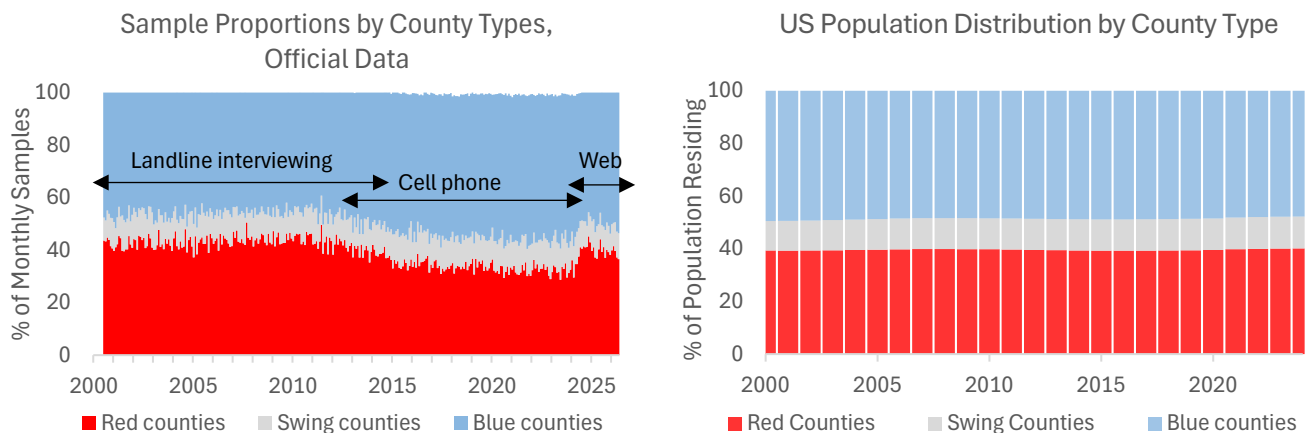
Third, focusing on the period after the methodological transition that began in April 2024 and was completed in June 2024, we see that until the first quarter of 2025, Republican shares (red bars) under cell phone interviewing are well within the historical range, whether we consider the larger historical range under web interviewing or the narrower one under cell phone interviewing.

A decline in self-identified Republican shares below the historical range is not visible until March 2025 (whether the range is based on web or cell phone data). These shifts coincide with the presidential transition, not the methodological transition that began almost a year earlier. Moreover, these shifts are consistent with Gallup’s findings that party preferences [shifted to the left in 2025](#), largely driven by independents newly leaning toward Democrats.

Indeed, evidence shows **a person’s political affiliation is dynamic rather than fixed, and thus the distribution of self-reported political identification in the US changes over time as well.** Our rotating panel design, which re-interviews respondents six and twelve months after their initial interview, enables us to measure within-person changes in self-reported political affiliation over time. In re-interviews in either mode over the past few years, roughly one in five consumers reported a different political affiliation than in their prior interview, consistent with evidence from [other major national surveys](#).

Importantly, political affiliation is asked only at the end of the interview, after questions on economic sentiment and expectations. This design reduces the likelihood that respondents are primed to think about politics or partisanship when answering economic questions. Instead, reported political identification may capture respondents’ current perceived alignment with a party’s economic approach, which can shift over time. Taken together, we should not expect “true” self-identified political shares in the underlying population to be fixed across time.

(5) Under web interviewing, the proportion of respondents living in blue versus red counties closely matches the US population distribution



Political preferences within a geographic area tend to be much more stable. We can therefore look to the sample shares of respondents who live in areas that vote consistently “blue”, consistently “red”, or are “swing counties” to better understand if one type of area or another is disproportionately represented in the data.² The right chart of figure 5 shows

² These classifications are based on scholarly research by [Cullen, Turner, and Washington \(2021\)](#), using voting behavior in the past three presidential elections. If a majority of a county voted for the Republican candidate in 2016, 2020, and 2024, it is classified as a consistently “red” county; if a majority voted for the Democratic candidate in all three elections, it is classified as a consistently “blue”



the US population distribution by the three county types since 2000.³ These population shares have been quite stable over time; almost half of the US population live in blue counties and about 40% of the population resides in red counties, generating a blue-red differential of about 8 to 10 percentage points. Only about 12% live in swing counties.

The left chart shows the distribution of survey respondents residing in these three county types, which varies with interview mode. Between 2000 and 2012 under landline-only phone interviewing, the share of respondents in swing counties matched the US population. The sample proportion in blue counties generally exceeded that in red counties by an average of 3 percentage points, compared with the differential of 8 to 10 percentage points in the US population. Between 2015 and March 2024 under cell-phone only interviewing, the blue-red county sample differential grew to an average of 22 percentage points, with much higher representation of residents of blue counties than the national population.

Following the methodological transition to web interviewing, the share of respondents from red counties rose and the share from blue counties declined, with an average blue-red differential of less than 10 percentage points, matching the differential seen in the population as a whole. **Under the current methodology, the shares of respondents from blue and red counties now much more closely mirrors the US population, indicating that web interviews do not disproportionately draw from blue areas.**

Appendix

Categorization of survey respondents into political affiliation groups is based on the following question: “Generally speaking, do you think of yourself as a Republican, a Democrat, an independent, or what?” This question appears near the end of the interview, after all economic questions have already been asked.

All estimates employ survey weights.

Question text for components of the Index of Consumer Sentiment are detailed [here](#).

county; if the county voted for one party twice and the other party once, it is classified as a “swing” county.

³ Based on Census population estimates.