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BULLETIN

U.S. midterm elections as a test of support for the Trump administration

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This year's midterm congressional elections, scheduled for 3 November, will serve as a referendum on President Donald Trump's administration. As a result of his economic policies based on the broad use of tariffs, the unpopular war with Iran, and rising living costs, Republicans must brace for defeat. A potential Democratic majority in both chambers of Congress would create a long-term conflict between the legislative branch and Trump, whose term lasts until 2029. Such a majority would also give Democrats significant oversight tools, which would be useful in campaigning ahead of the 2028 elections.

Motivations of american voters. The country's economic situation is playing a key role in voters' evaluations of individual candidates. Deepening disappointment with the consequences of the administration's trade policies has led to a decline in support for the president and, as a result, to a drop in Republicans' approval ratings. According to an AP-NORC survey, while support for Trump on economic issues stood at 40% at the beginning of his term, it fell to 31% by the end of 2025. The situation was exacerbated by the outbreak of war with Iran and the crisis in the global fuels market, which, according to an AP-NORC survey from October of this year, led to a drop in support to just 25%. The average price of a gallon (3.79 litres) of gasoline in October of this year was about $4.27, compared to about $3 a year earlier, while diesel fuel averaged about $6.30, compared to $3.60. According to data for September, energy prices in the U.S. rose by 20.4%. These indicators are having a negative impact on Americans' pre-election sentiment, even though the higher cost of fuel has not yet noticeably translated into higher product prices. However, the effects of the price hikes may be particularly severe for the poorest households, in which spending on basic necessities accounts for the largest portion of their budget. Loan servicing costs are also rising again, which means loans are becoming less accessible. Although the Fed has cut interest rates three times since the beginning of Trump's presidency—from 4.25-4.5% to 3.5-3.75%—it raised them by 0.25 percentage points in September of this year. The probability is high that another rate hike, bringing the rate to 4-4.25%, will occur as early as December of this year.

Controversies surrounding the administration's immigration and domestic security policies, allegations of corruption and abuse of power, and concerns about the future of American democracy also are having a significant impact on voter sentiment. The extent to which individual issues influence voter sentiment varies depending on party affiliation and sociodemographic characteristics. The attitudes of independent or undecided voters could be key to the outcome and their level of mobilisation could influence the results in the most competitive districts.

Foreign policy typically plays a lesser role in U.S. elections, but in this cycle the administration's decisions are directly impacting voters' financial wellbeing, mainly due to the energy crisis triggered by the war with Iran. A poll by Activote (12-18 October) also showed that 63% of registered voters (87% of Democrats, 71% of independents, and 25% of Republicans) oppose Trump's decision to ease sanctions on Russia. As a result, some conservative voters may choose not to vote, expressing their dissatisfaction with the administration's approach to Russia and Ukraine. A similar dynamic could play out among some MAGA voters, who are

disappointed by what they see as excessive U.S. involvement in Israel's interests in the region.

Challenges facing the Democratic Party. Since July of this year, the Democrats' standing in national election polls has improved significantly. In the second half of October, the party's average lead over the Republicans stood at about 8-9 percentage points. According to projections by Decision Desk HQ and Scrutinel on 26 October, the Democrats have a 79% to 93% chance of taking control of the House of Representatives and a 57% to 60% chance of securing a majority in the Senate. Currently, the Democrats hold a lead in nine of the 11 states where the Senate race is particularly close (the Republicans lead only in Florida and Kansas), though the margin is narrow (ranging from 1 to 3 percentage points).

The Democrats' lead over the Republicans in the polls stems mainly from the declining popularity of Trump and his administration. According to the Pew Research Center, 84% of voters who say they will vote for the Democratic Party cite their disapproval of the current administration's policies as their main motivation. However, Gallup Institute surveys also show that less than half of the public (43%) supports the Democrats, while an identical percentage considers the party too extreme. These results reflect the perception of a lack of an appealing policy platform and a leadership crisis within the party. Internal disputes between the party establishment and the progressive wing, as well as challenges posed by the growing influence of the Democratic Socialists of America, are also significant problems for the party. This latter group, whose members often run on the Democratic ticket, advocates for reducing social inequality and expanding the welfare state, making it an easy target for Republican attacks. The Democratic Party is also threatened by its supporters' overconfidence in certain victory, which could result in low voter turnout. Additional risks stem from the administration's redistricting changes to favour Republicans in a large number of congressional districts, as well as the consequences of the U.S. Supreme Court's April ruling in *Louisiana v. Callais*, which restricts the ability to draw district boundaries in a way that enhances the representation of racial minorities. Uncertainty ahead of the election is heightened by disputes over voter eligibility verification and the Supreme Court's decision to allow the use of the federal SAVE system in this regard, which raises concerns about the potential for the erroneous removal of eligible voters from the rolls. A significant risk stems from Russia's intensification of disinformation campaigns aimed at discrediting Democratic candidates and politicians from both parties who support Ukraine, deepening social polarisation, and undermining confidence in the electoral process. Furthermore, there remains a risk of underestimating support for Trump and the Republican Party, as has occurred in previous election cycles.

Post-election outlook and conclusions. The administration may attempt to challenge unfavourable election results by accusing the Democrats of fraud. There is also the possibility of pressure being exerted on officials responsible for voting in their states, intimidation of minority voters by ICE or other federal agents, or legal challenges to the legitimacy of elections in court, which could delay the official certification of the results. Republicans could also use their constitutional authority to resolve election disputes in the lower chamber between elected officials and their opponents. Nevertheless, such complications are unlikely to lead to a prolonged crisis, given the decentralised nature of the U.S. electoral system and the legal requirement to resolve disputes within specific timeframes.

A Democratic majority in the House of Representatives would partially limit the White House's political manoeuvring, primarily by taking control of committee chairs, gaining investigative powers, and increasing budgetary oversight. Trump, however, would retain his most important executive prerogatives, particularly in foreign policy. A Democratic takeover of both the House and the Senate would further increase pressure on the administration, forcing it to reach compromises with both chambers and making it more difficult to appoint officials to top positions that require Senate confirmation. Given the balance of power on the domestic front, however, there is no chance that the Democrats will secure the two-thirds majority in both chambers needed to override a presidential veto or, in the Senate, enable them to remove the president from office following impeachment by the House of Representatives.

The second half of Trump's presidency will likely be a period of escalating political disputes, congressional investigations, and protracted budget negotiations. A Democratic majority in Congress will also create greater opportunities to oversee military aid programs for Ukraine or to block attempts to further ease sanctions imposed on Russia, though there is no guarantee that the administration will comply. In foreign policy, this would deepen the rift between the White House and Congress, leading to further tensions in U.S. relations with its allies. Furthermore, such a victory would likely make it easier for Democrats to resolve internal party disputes, which would increase their chances of winning the 2028 presidential election.

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