

Cozen Currents: Biden Gets No Respect

The Cozen Lens

- The economy continues to show positive signs, and consumer sentiment has reached its highest level since July 2021. However, any boost for President Biden in the polls remains elusive.
- The fight over immigration enforcement at the southern border is shifting from a legislative battle to a messaging battle and both former President Trump and President Biden are leaning in.
- It will be difficult for Democrats to hold onto the Senate this year. A likely GOP flip of the chamber would potentially empower Republicans to pass budget reconciliation bills under a unified Republican government or at least hold a veto over President Biden's nominees and legislation.

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Will the Economy Getting Better Help Biden?

Biden Can't Capture the Economy's Good Vibes. Despite the economy's continued success, President Biden's poll numbers are still lagging as voters are not crediting him for their improving economic mood.

- Part of the challenge for Biden in convincing voters to credit him for the positive economy is that he was starting from such a low point. A recent AP-NORC poll found that 65 percent of respondents still describe the economy as poor. This is a decline from one year ago, where 76 percent of respondents felt the economy was poor, but suggests that Biden still has work to do.
- An explanation for the lag between consumer sentiment and Biden's poll numbers is trust in him to handle the economy. An NBC News poll last month found that former President Trump had a 20-point lead over Biden among voters on which candidate would better handle the economy.
- One of the economic indicators that the White House has paid the most attention to is gas prices, which have continued to fall in recent months. Although bringing down gas prices was a major focus during Biden's fight against inflation, lower prices at the pump have done little to boost Biden's standing with voters. Gas prices could also become a danger to Biden in months ahead as they are beginning to show signs of their seasonal upward climb.

Polarization's Economic Glasses. One reason to doubt that the improvement of the economy may help Biden is due to the increasingly partisan perspectives on the economy, a divergence that has emerged and grown since Trump was first elected.

- The most recent University of Michigan survey on consumer sentiment found the largest gap between respondents identifying as Democrats and Republicans to date, nearly 50 points. Democratic respondents have seen the biggest uptick in recent months, while Republican respondents have been relatively flat.
- Increasing polarization has been well documented in the US, but how it impacts economic perceptions is a newer phenomenon. With voters less likely to cross party lines, the critical block to watch will be independent voters and which party their economic perceptions lean closer toward. In the most recent survey, this group leaned toward the more skeptical Republicans, but not by an insurmountable margin.

When a Tie is a Win. Biden may not have to get positive ratings for his handling of the economy,



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but if he can remove the liability, that alone could be enough.

- A fading recession risk has removed one of the biggest threats to Biden's reelection chances. However, he still struggles to find an economic message that resonates with voters. This is partly due to the time that the industrial policies he has backed take to have tangible effects.
- For Biden, focusing on the economy is unlikely to be a winning campaign strategy. But the Biden campaign team does not believe he needs to be better than Trump; rather, he just needs to sufficiently neutralize Trump's advantage on the economy such that the outcome turns on non-economic issues that play to their own advantage, like abortion rights.

Border Politics

Immigration Reform Shifts to a Messaging Battle. After much fanfare over a potential immigration reform bill, the Senate voted 49 - 50 last week to block consideration of a \$120 billion supplemental funding bill that included bipartisan changes to border policy.

- The Senate's vote last week ended four months of negotiations over border policy changes first requested by Senate GOP leadership in an effort to build support within the conference for a broader foreign aid bill for Ukraine, Israel, and Taiwan. The bill's failure all but eliminates the chance Congress passes border policy change before the election, marking the latest in a string of nearly 20 years of high-profile failures to change immigration policy.
- The demise of the border policy bill is turning immigration reform into a messaging battle that quickly reached the presidential campaign. For former President Trump, this creates an opportunity to continue attacking President Biden over the record number of monthly encounters at the southern border. Trump leaned on congressional allies to help kill the bipartisan deal while simultaneously promising tougher border enforcement if he is re-elected in November.
- For Biden, the key question is if he can shift blame for the high number of border crossings to Trump and the GOP now that they have blocked the immigration bill. Immediately following reports the bill would fail, Biden delivered remarks stating, "Every day between now and November, the American people are going to know that the only reason the border is not secure is Donald Trump and his MAGA Republican friends."

Biden's Immigration Trust Problem. Although GOP opposition to the border deal could create an opening for the Biden campaign, voters' long-standing preference for Republican leadership on immigration suggests greater attention to the issue could be a detriment to Biden.

- The challenge for Biden and Democrats running in close congressional races is voters overwhelmingly blame the president for the situation at the border despite his actions to limit asylum claims. A January poll of seven key swing states found 61 percent of voters blame Biden for the surge in migration compared to 30 percent who blame Trump. Those numbers are just as bad for congressional Democrats, who voters were two times more likely to call "very responsible" for the situation than their Republican counterparts.
- Biden's focus on the issue risks elevating a problem voters largely view him as responsible for. Further polling from this month found that independent voters are increasingly listing immigration as a top concern heading into the election as worries about inflation and the economy recede.
- Bringing a debate about immigration policy into the headlines could play into the Trump campaign's hands. The former president told supporters last month he welcomes the blame for the failure of the immigration deal in Congress.

Changing of the Guard. Trump's preference for campaigning on strict immigration enforcement and opposition to the bipartisan border policy deal has significant ramifications within the GOP as well.

- The 118th Congress has not been Senate Minority Leader Mitch McConnell's (R-KY) best turn atop GOP leadership. Senator Rick Scott (R-FL) launched the first challenge to McConnell's leadership in 15 years as party leader with support from a growing number of

Trump-aligned senators following the 2022 midterms. Those members have been emboldened in their opposition by the immigration policy fight.

- The immigration bill's failure is drawing into question McConnell's ability to lead his party. The Senate minority leader is on notoriously poor terms with Trump, and the former president's opposition to the immigration bill was partly fueled by his interest in embarrassing McConnell.

The Stakes in the Senate

Advantage: GOP. It's too early to say much about the elections to come in November, but one thing is clear: Republicans start the race for the Senate with a major advantage.

- Democrats are defending three Senate seats in states former President Trump won twice by large margins (WV, MT, OH), four more in states Trump won in 2016 (PA, AZ, MI, WI) and another three in states that Democrats won in 2016 but President Biden won only by single digits in 2020 (NV, MN, ME). Democrats also are defending an open seat in Maryland, for which highly popular former Republican Governor Larry Hogan declared his candidacy last week. The only vaguely competitive races Republicans are defending are Texas and Florida.
- Democrats have essentially no margin for error with their current 51-49 majority. Losing even one seat — almost a certainty given Senator Joe Manchin's (D-WV) retirement — would lead to a 50-50 Senate with ties to be broken by the vice president. Losing just one more would result in a GOP majority regardless of the presidential outcome.
- Democrats' best chance to keep the Senate in 2024 is the same thing that saved them in 2022: that the GOP will nominate unpopular candidates that appease the base in the primaries but struggle to win the general election. Senate GOP leadership have lined up good candidates in most key races but at the end of the day, Republican primary voters have the final say in who their candidate will be.

Republicans' Trump Card. With the GOP likely to control the Senate, Republicans will be able to block Democrats' legislation and Biden's nominees even if they control the White House and the House. And in the best-case scenario where they win unified control of government, they would be able to use budget reconciliation to pass sweeping legislation like tax reform (again).

- Under a second Biden term, a Republican Senate would hold the power to block all executive and judicial nominees. Biden would either have to work with what he currently has or seriously moderate his picks to get them through a hostile environment (though if the GOP wins more than 52 or 53 seats, compromise with moderate Republicans may not be enough anyway). Divided government ensures that all legislation — including resolving many Tax Cuts and Jobs Act (TCJA) provisions expiring in 2025 — must be negotiated with Senate Republicans.
- The makeup of the Senate is also considerably more MAGA than in Trump's first term, meaning the body will act as less of a check on a second Trump term, leading to more extreme and unorthodox nominees getting through. Senate control under unified government also grants Republicans the power of using budget reconciliation to pass significant legislation on a party-line basis. Under such a scenario, many of the expiring TCJA tax provisions are likely to be made permanent and major sections of the Inflation Reduction Act dismantled.
- While Senator Chuck Schumer (D-NY) is likely to remain as majority leader following an unlikely Democratic hold on the upper chamber's control, who would helm a GOP Senate is more of an open question. Senate Minority Leader Mitch McConnell's (R-KY) recent failures to shepherd Ukraine aid through the body by tying it to border security and questions about his age and health have led to an eruption of discontent among his colleagues. Crucially, he and Trump have not spoken since before January 6th, 2021, almost ensuring someone else would be needed to lead the body. Whenever McConnell does step down, his potential replacement boils down to three men all named "John." While the consensus favorite appears to be Senator John Thune (R-SD), if Trump is elected, Senator John Barrasso (R-WY), who has the best relationship with the former president of the three, may take the spot.