

Tiber Creek Group's
ELECTION OUTLOOK

JULY 2026

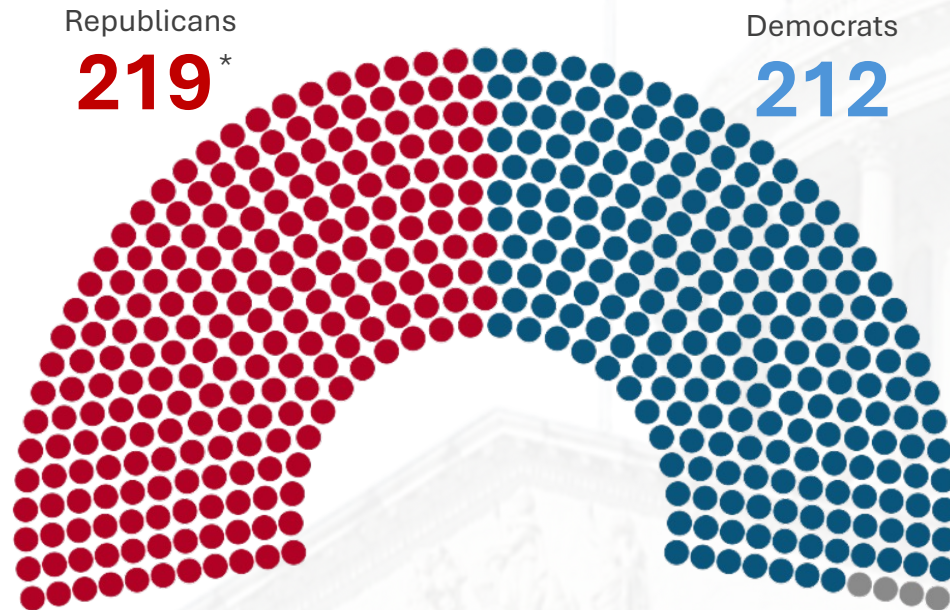


The Political Environment

Snapshot and Key Indicators



Balance of Power



House of Representatives

All **435** House seats are contested in 2026

Democrats must flip **3-4** seats currently held by Republicans to gain a majority

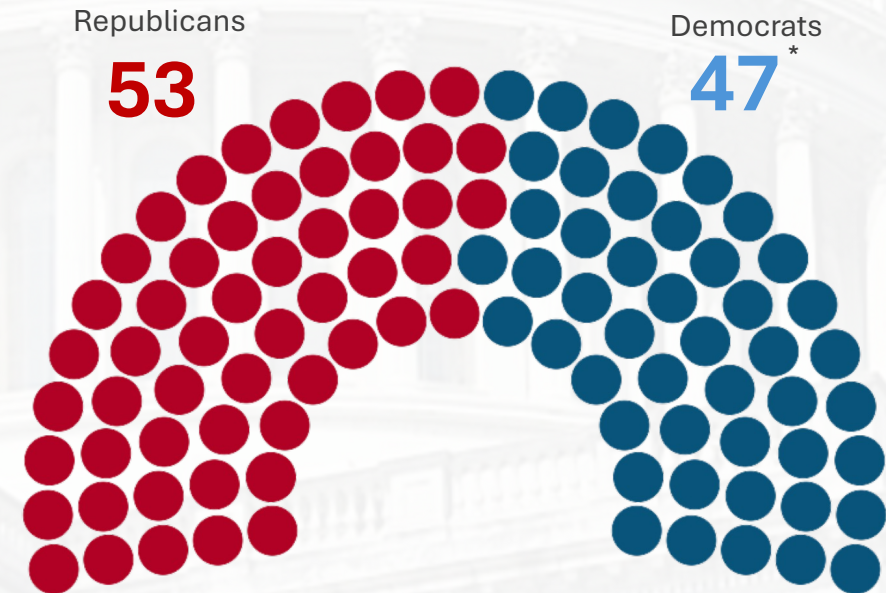
4 Vacancies (CA-14, GA-13, FL-20, TX-23)

Special election for GA-13 to be held on July 28

Special election for CA-01 to be held August 4

Special election for CA-14 to be held on August 18

**includes Rep. Kevin Kiley (I-CA) who caucuses with Republicans*



U.S. Senate

35 Senate seats are contested in 2026

Races to Watch: **GA, MI, ME, NH, NC, OH, AK**

**Includes 2 Independents who caucus with Democrats*

Congressional Turnover

As of 7/21/26

Not reflecting resignations and deaths

79^{*}

incumbents will not return to their seats next term, **a record number**.

12

Senators and

4 Democrats / 8 Republicans

67

U.S. Representatives

28 Democrats / 39 Republicans



38

retiring from public office

9

lost their primary elections

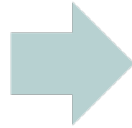
35

running for a different office, with 14 seeking governorships, 17 looking to make the jump from House to Senate, 1 running for State Senate, and 1 ran for state AG.

**Sen. Marsha Blackburn (R-TN) and Sen. Amy Klobuchar (D-MN) are not up for reelection but will resign if they win their governor races; as such, they are not included in the total. Sen. Michael Bennett (D-CO) lost his primary bid for governor and will keep his seat*

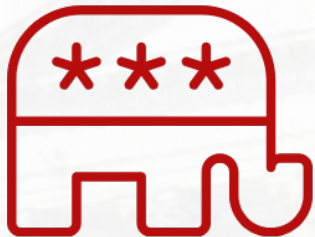
Halfway Through the Primaries

Key Takeaways



The electorate is increasingly willing to vote for more progressive and younger candidates in solid Democrat seats. However, in most competitive House districts, establishment-backed Democrats have won primaries or are on track to win the nomination.

The August 4 primary for the Michigan Senate race will test whether a progressive can win in a competitive swing state, not just safe blue seats.



Voters have rallied behind the President's House and Senate picks – all 170 of President Trump's endorsed congressional candidates have won their primaries so far.

Incumbent Losses

As of 7/20/26

Louisiana



Sen. Bill Cassidy
defeated by



Rep. Julia Letlow

Texas



Sen. John Cornyn
defeated by



Ken Paxton

KY-04



Rep. Thomas Massie
defeated by



Ed Gallrein

TX-02



Rep. Dan Crenshaw
defeated by



Steve Toth

Incumbent Losses

As of 7/20/26

TX-33



Rep. Julie Johnson
defeated by

TX-18



Rep. Al Green
defeated by

NY-10



Rep. Dan Goldman
defeated by

NY-13



Rep. Adriano Espaillat
defeated by

CO-01



Rep. Diana DeGette
defeated by



Colin Allred



Rep. Christian Menefee



Brad Lander



Darializa Avila Chevalier



Melat Kiros



Sen. Michael Bennett (CO)

became the first sitting senator to lose a gubernatorial primary since 2010.

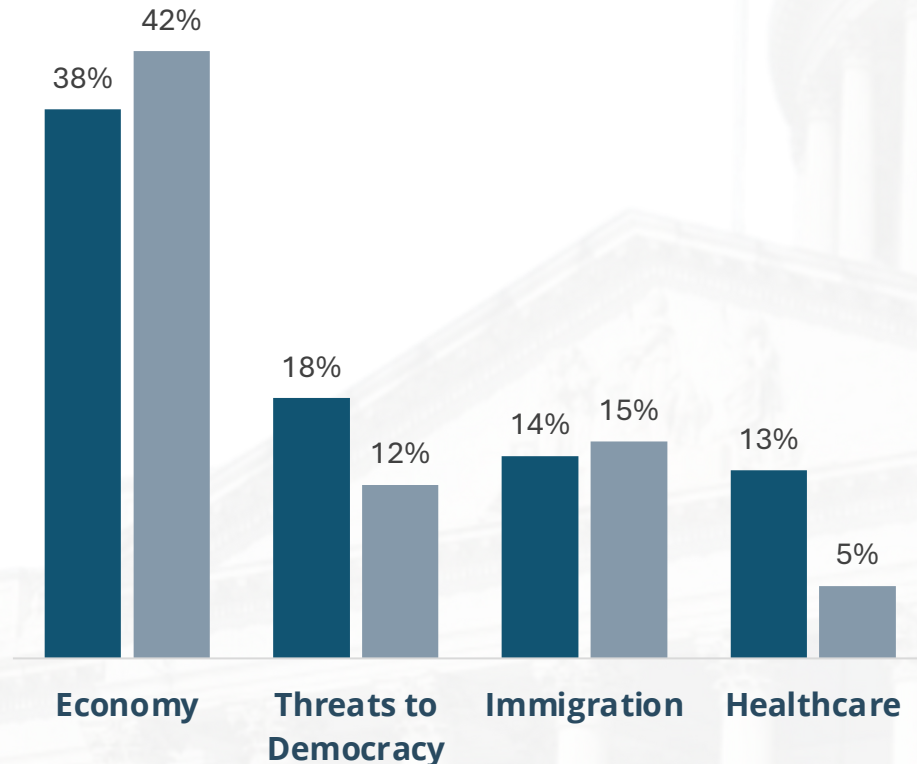
Since he is not in cycle, he will keep his seat.

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The Electorate

Top Issues for Voters

■ 2026 ■ 2024



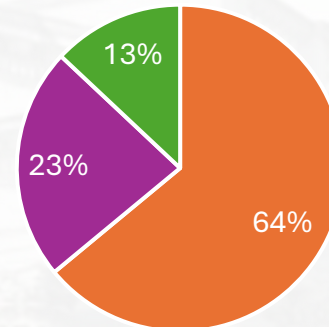
President Trump has a **39% approval rating** among likely voters.

In June 2024, the economy was the most important issue to voters, followed by immigration, threats to democracy, and healthcare.

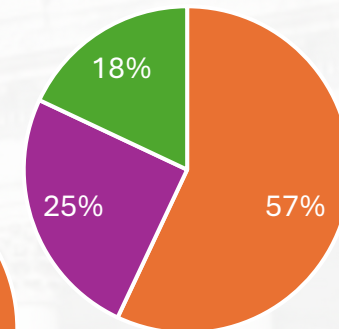
In June 2026, the **economy remains the top issue for voters**, and voters continue to prioritize the same issues as in 2024, though healthcare concerns have more than doubled since 2024.

Affordability is a key issue for the midterm elections, with the cost of healthcare, groceries, and gasoline/transportation topping the list of economic concerns for U.S. adults.**

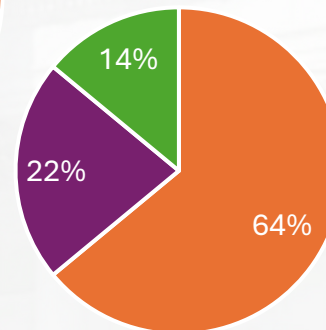
Healthcare Affordability



Food and Groceries



Gasoline and Transportation Costs



■ Concerned
■ Semi-Concerned
■ Not Concerned

*Emerson College polling June 7-8 (2026) and June 4-5 (2024)

**KFF polling April 14-19, 2026

SAVE America Act

President Trump has called the SAVE America Act **his number one legislative priority**.

In early June, the SAVE America Act failed as an amendment to the reconciliation bill for immigration funding.

With the legislation stalled in the Senate, the **SAVE America Act is unlikely to change how the 2026 midterms are administered**, but similar state-level bills will be enforced in 2026.

Requires states to share voter lists with the Department of Homeland Security's Systematic Alien Verification Entitlements database

Requires voters to provide documentary proof of citizenship during voter registration

Mandates states to conduct frequent voter purges

Requires those voting in person and by mail to show an eligible ID

Authorizes the Attorney General to take legal action against states that fail to comply with the new requirements

**SAVE
AMERICA
ACT**

Election Dynamics

Looking to 2026 and 2028



Midterm Trends in the House



The House has changed party control **18** times since 1856.

1994

Republicans gained **54 seats**, ending 40 years of Democratic control.

2010

GOP gained **63 seats**, the largest victory in a midterm since 1938.

2022

Republicans **narrowly recaptured** control of the U.S. House in the 2022 midterms by a slim margin.

2006

Democrats gained **31 seats**, flipping control from Republicans.

2018

Democratic turnout during President Trump's first term led the party to gain **41 seats**.

Midterm Shifts and Presidential Approval

2006



37%

-31 seats

233 - 202

2010



46%

-63 seats

242 - 193

2018



41%

-41 seats

235 - 199

2022



38%

-9 seats

222 - 213

2026



39%

? - ?

Despite President Biden's low approval rating in 2022, post-2020 redistricting and increased voter turnout in response to *Dobbs v. Jackson Women's Health Organization* helped incumbent Democrats overperform Biden's margins in their districts and offset Republican pickups.

120th CONGRESS: SENATE PROJECTIONS

13 Democrat Seats

9 Solid Democrat

1 Likely Democrat
(MN)

2 Lean Democrat
(NH, GA)

1 Toss-Up
(MI)

22 Republican Seats

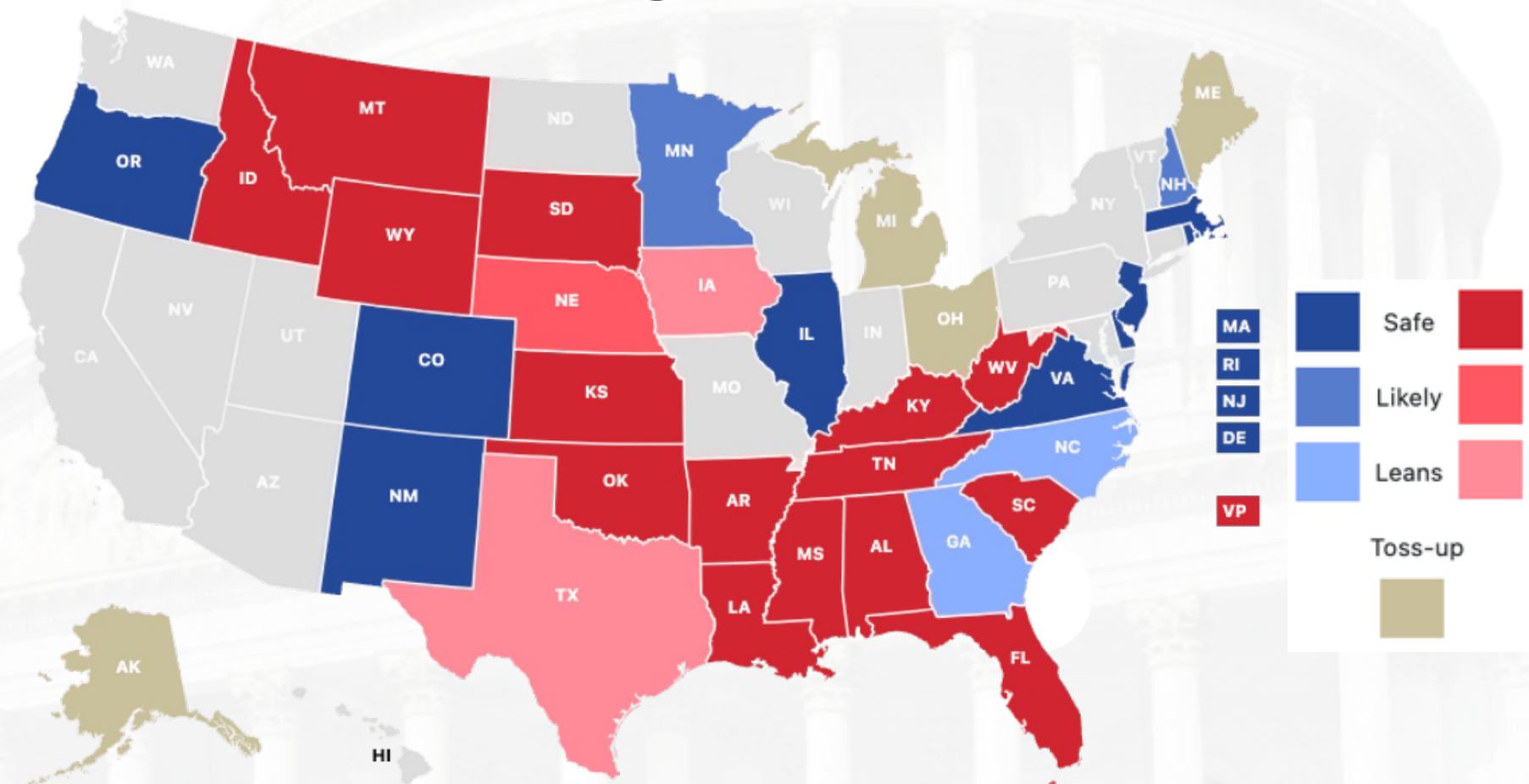
15 Solid Republican

1 Likely Republican
(NE)

2 Lean Republican
(IA, TX)

3 Toss-Up
(ME, OH, AK)

1 Lean Democrat
(NC)



Up in 2026: **13** Democrats | **22** Republicans

Look Ahead: Senate Races to Watch

Democrats need a net gain of 4 seats to win the majority.

Toss Up Races



MAINE

Collins (R) | Toss Up

Harris + 6.9



ALASKA

Sullivan (R) | Toss Up

Trump +15



OHIO

Husted (R) | Toss Up

Trump +11



MICHIGAN

Open | Toss Up

Trump + 1.4

**Maine Senate Race: With Graham Platner suspending his Senate campaign, Maine Democrats will hold a nominating convention to name a replacement by July 27.*

Competitive Races



NEW HAMPSHIRE

Open | Lean D

Harris + 2.8



GEORGIA

Ossoff (D) | Lean D

Trump + 2.2



NORTH CAROLINA

Open | Lean D

Trump + 3.2



IOWA

Open | Lean R

Trump + 13.3



TEXAS

Open | Lean R

Trump + 14

120th CONGRESS: HOUSE PROJECTIONS

**216 Democrat
Seats**

181 Solid Democrat

5 *Solid Republican*

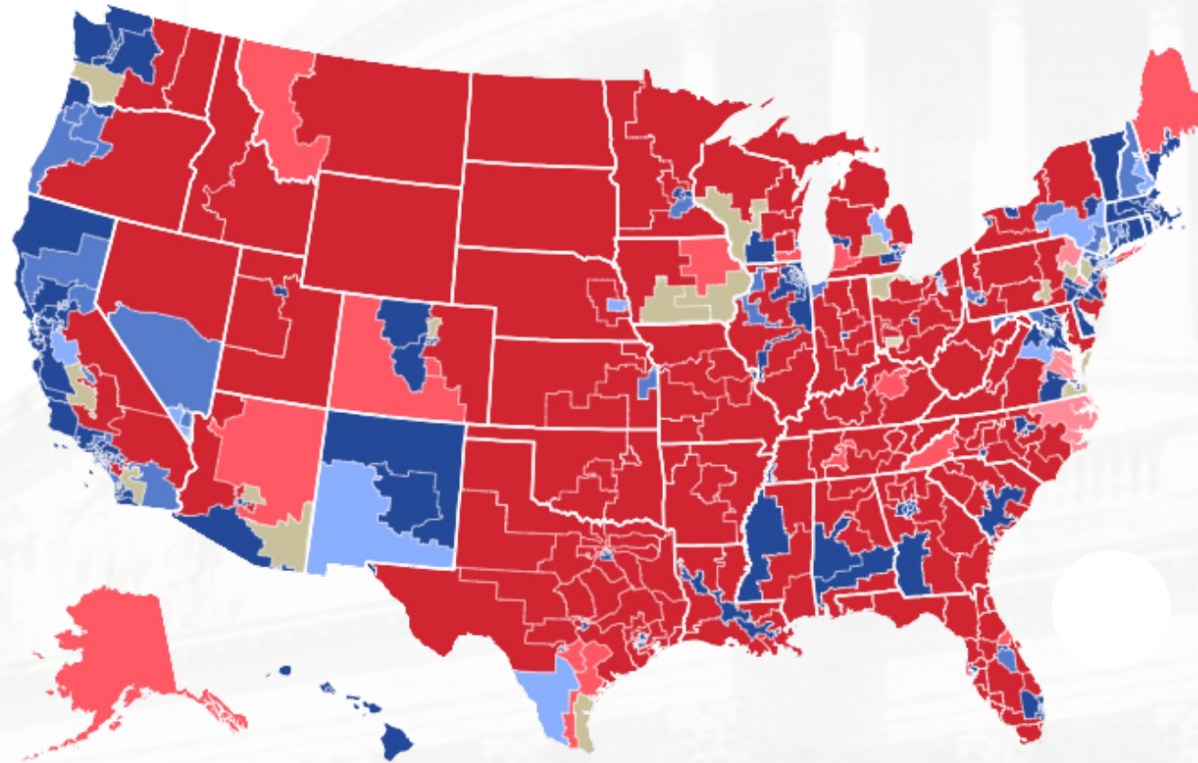
11 Likely Democrat

4 *Likely Republican*

8 Lean Democrat

3 *Lean Republican*

4 Toss-Up



**219 Republican
Seats**

180 Solid Republican

3 *Solid Democrat*

14 Likely Republican

6 Lean Republican

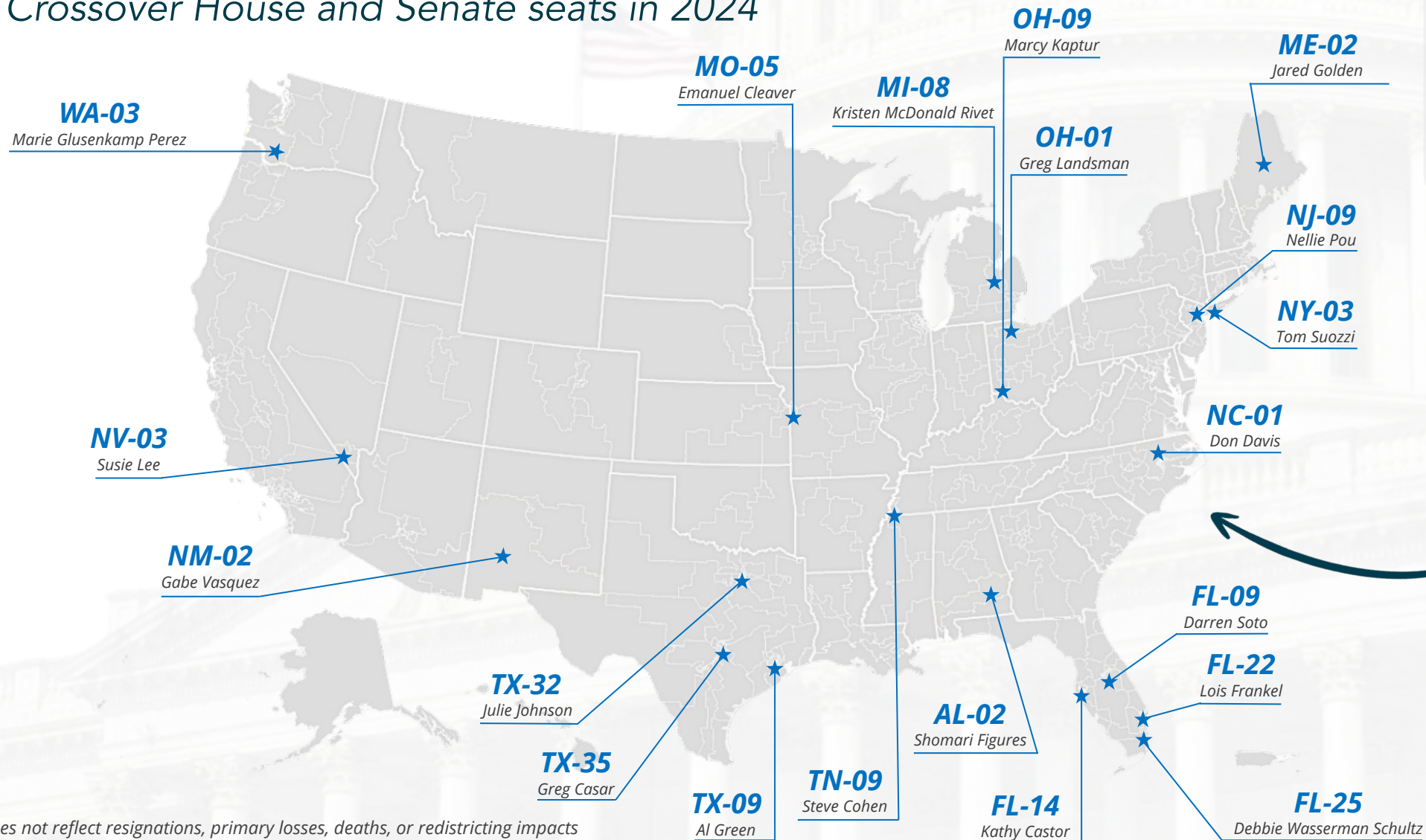
2 *Lean Democrat*

14 Toss-Up

Projected Total: **212** Republican **205** Democrat **18** Toss-Ups
218 needed for majority

Election Year Dynamics

Crossover House and Senate seats in 2024



Jon Ossoff (GA) is one of two Democratic senators defending seats in states won by Trump; the other, **Gary Peters (MI)**, is not seeking reelection.

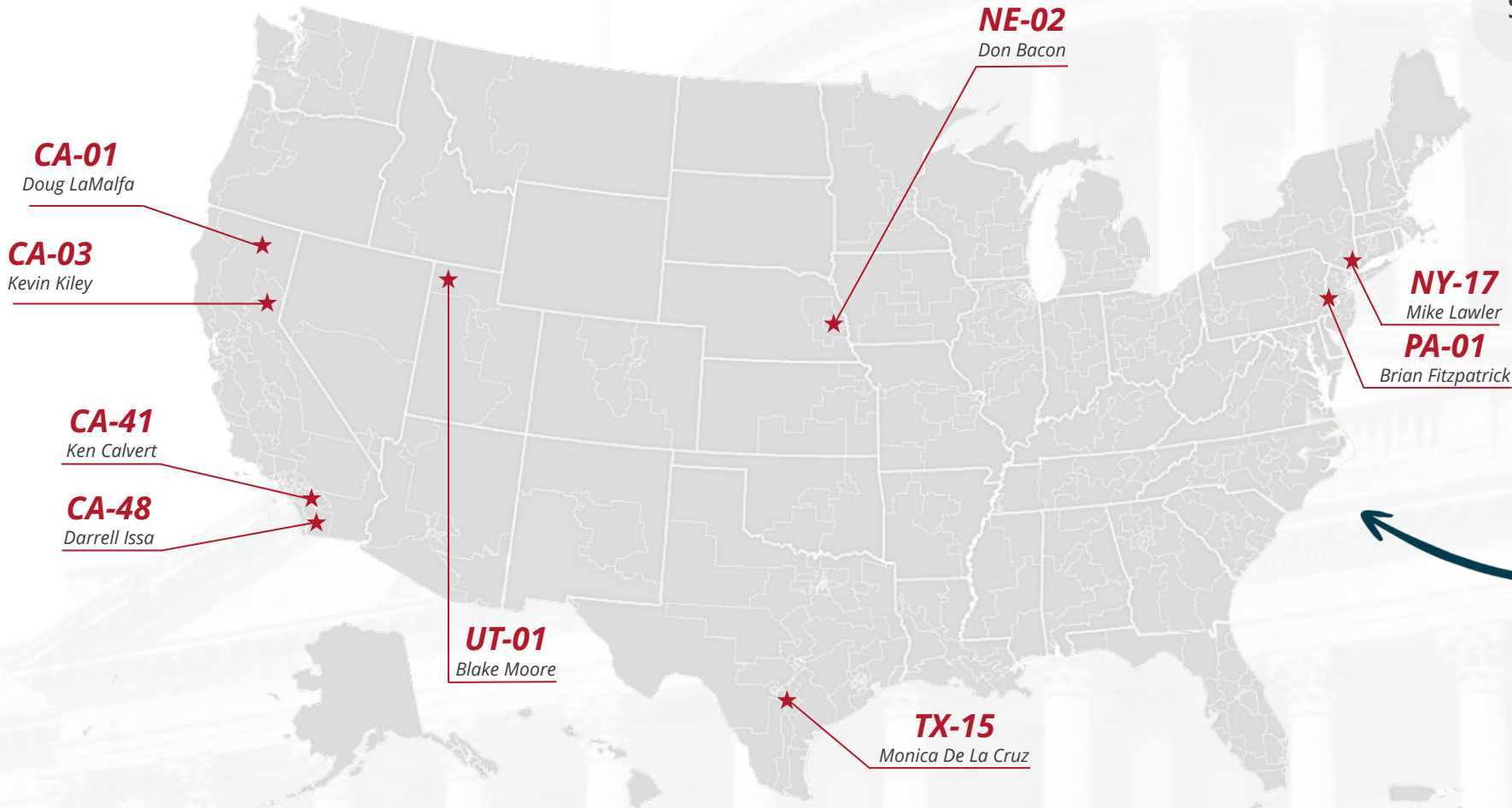
20

House Democrats
in Trump districts

*Does not reflect resignations, primary losses, deaths, or redistricting impacts

Election Year Dynamics

Crossover House and Senate races in 2024



Susan Collins (ME)

is the only GOP Senator defending a seat in a state won by Harris.

9

House Republicans
in Harris districts

*Does not reflect resignations, primary losses, deaths, or redistricting impacts.

Redistricting: Latest Updates



The Supreme Court ruled in a 6-3 decision in *Louisiana v. Callais*, **limiting the scope and scale of Section 2 of the Voting Rights Act**. The decision requires evidence or at least “**a strong inference**” of **discriminatory intent** in the drawing of legislative lines to prove that a map unfairly discriminates against minority voters.



The decision opened the door for southern states, including Alabama and Tennessee, to **redraw congressional maps**.

While the 2026 redistricting battle has largely concluded, several states are positioning themselves for new districts ahead of 2028.



Georgia and Mississippi are expected to revisit their maps, while Democrats in Colorado and New York are in the process of amending their state constitutions to give them **full control of the redistricting process**. Redrawn maps are still **subject to legal challenges** and must **withstand judicial scrutiny**.

Redistricting

Recently, a mid-decade redistricting battle has emerged as parties compete for control of the House in 2026. Ohio was the only state mandated to redraw its maps this year.

State	How many seats could flip?	Status of new map
Texas	GOP +3-5	Signed into law
Missouri	GOP +1	Signed into law
Florida	GOP +4	Signed into law
Ohio	GOP +0-3	Bipartisan commission enacted new map
North Carolina	GOP +1	State legislature enacted new map
California	Dem +3-5	Enacted through statewide ballot measure
Utah	Dem +1	Enacted through court order
Virginia	Dem +0	Struck down by VA Supreme Court
Tennessee	GOP +1	Signed into law
Louisiana	GOP +1	Signed into law
Alabama	GOP +1	Signed into law

Redistricting: Potential Scenarios

Potential Democrat Flips

CA-01	Gallagher
CA-06	Kiley
UT-01	Open (Moore)

Potential Republican Flips

AL-02	Figures
LA-06	Open (Fields)
MO-05	Cleaver
TN-09	Open (Cohen)
TX-09	Open (Green)
TX-32	Open (Johnson)
TX-35	Open (Casar)

Potential Outcome: GOP net +4

Alabama: Governor Kay Ivey signed legislation reinstating the 2022 maps and shifting the 2nd District back to a safe Republican seat.

Louisiana: The new 6th District would have voted for Trump by more than 30 points in 2024. Incumbent Rep. Cleo Fields announced he will not be seeking re-election.

Tennessee: Governor Bill Lee signed the state's new congressional map dividing the city of Memphis into three congressional districts and effectively removing the state's only Democratic district held by Rep. Steve Cohen. President Trump would have won all nine seats by at least 20 points in 2024.

Missouri: Governor Mike Kehoe signed a new map into law in September, flipping the state's 5th District into a safe Republican seat and securing GOP Rep. Ann Wagner's reelection in the 2nd District.

Florida: The state's new map gives Republicans the opportunity to flip four seats, but the races remain highly competitive. The new 9th and 14th Districts shifted 21 and 18 points, respectively, to the GOP.

Cook Political Report estimates Democrats would need to win almost **three-fourths of the 18 toss up seats** to flip control of the House.

**Rep. Kiley is an independent but caucuses with Republicans.*

Cook Political Report, as of 7/21/26

Look Ahead: House Races to Watch

Lean Democrat

CA-13	Gray
CA-48	Open (Issa)
MI-08	McDonald Rivet
NE-02	Open (Bacon)
NM-02	Vasquez
NV-03	Lee
NY-03	Suozzi
NY-04	Gillen
OH-01	Landsman
TX-28	Cuellar

Toss Up Seats

AZ-01	Open (Schweikert)
AZ-06	Ciscomani
CA-22	Valadao
CO-08	Evans
FL-25	Moskowitz
IA-01	Miller-Meeks
IA-03	Nunn
MI-07	Barrett
NJ-07	Kean Jr.
NY-17	Lawler
OH-09	Kaptur
PA-07	Mackenzie
PA-08	Bresnahan
PA-10	Perry
TX-34	Gonzalez
VA-02	Kiggans
WA-03	Perez
WI-03	Van Orden

Lean Republican

FL-14	Castor
FL-22	Open (Frankel)
IA-02	Open (Hinson)
MI-04	Huizenga
MI-10	Open (James)
NC-01	Davis
NC-11	Edwards
TX-15	De La Cruz
VA-01	Wittman

Gubernatorial Elections to Watch

INCUMBENTS



ARIZONA
Hobbs | Lean D
Trump + 5.5



NEVADA
Lombardo | Toss Up
Trump + 3.1



OPEN SEATS



MICHIGAN
Open | Lean D
Trump + 1.4



WISCONSIN
Open | Toss Up
Trump + 0.8



KANSAS
Open | Lean R
Trump + 16.2



IOWA
Open | Toss Up
Trump + 13.3



GEORGIA
Open | Toss Up
Trump + 2.2



OHIO
Open | Toss Up
Trump + 11

Election Year Disrupters

What to lookout for in the second half of 2026 and beyond...



Artificial
Intelligence



China



Trade



War in
Iran



Affordability



The
Unknown

Look **WAY** Ahead: 2028 Senate Races

34 Senate seats are up for regular election in 2028—**15** are held by Democrats while **19** are held by Republicans.

These seats were last contested in the 2022 midterms. Higher voter turnout in a presidential election year may affect the competitiveness of key Senate races.

