

Tiber Creek Group's
ELECTION OUTLOOK

SEPTEMBER 14, 2026

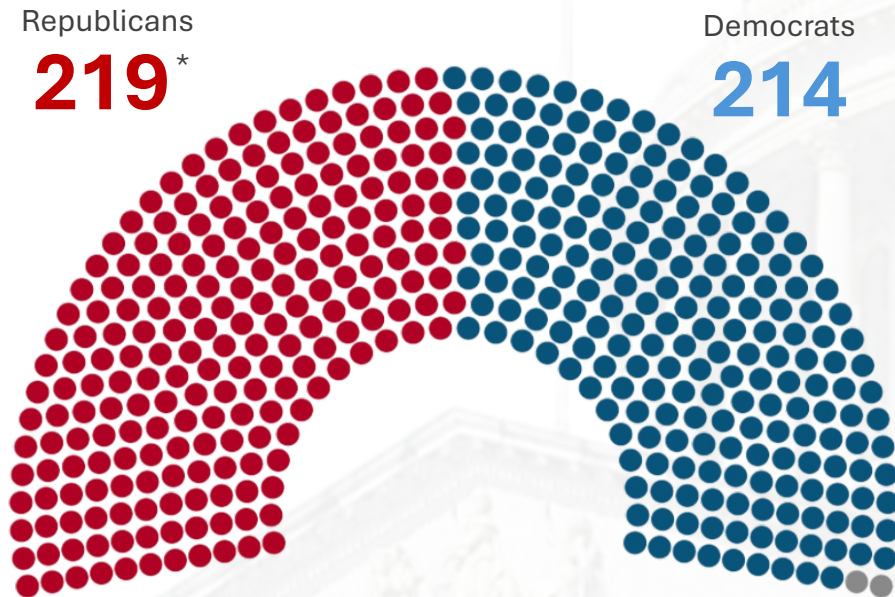


The Political Environment

Snapshot and Key Indicators



Balance of Power



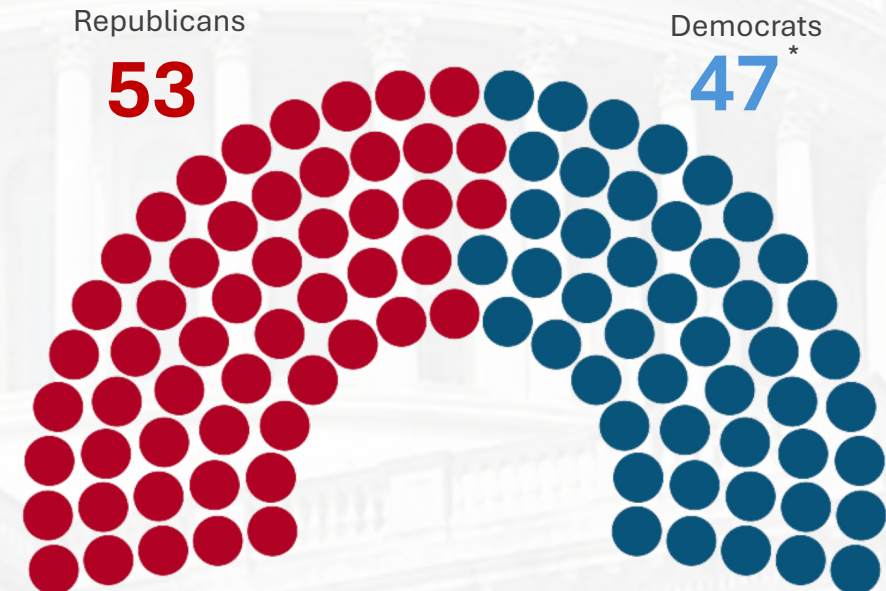
House of Representatives

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

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

2 Vacancies (FL-20, TX-23)

**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, TX, IA**

**Includes 2 Independents who caucus with Democrats*

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Congressional Turnover

As of 9/11/26
Not reflecting resignations and deaths

83^{*}

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

12 Senators and
4 Democrats / 8 Republicans

71 U.S. Representatives
30 Democrats / 41 Republicans



39

retiring from public office

13

lost their primary elections

34

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*

Impacts of Recent Primaries



Abdul El-Sayed's narrow victory over Rep. Haley Stevens for the Democratic Senate nomination likely makes the general election campaign more competitive, giving the GOP and **Mike Rogers** a better chance of flipping Michigan.

William Lawrence won a three-way Democratic primary to face **Rep. Tom Barrett** in **MI-07**, one of the most competitive House seats this cycle.

In **MI-08**, Trump-backed Amir Hassan lost his primary to **Tom Smith**, who had dropped out in July. The upset prompted Smith to revive his campaign against **Rep. Kristen McDonald Rivet**, and the race shifted further in the incumbent's favor.

Christina Hines will face **Mike Bouchard** for the open **MI-10** seat. Cook Political Report shifted the race from Lean R to Toss Up, noting Trump's three victories in the district and the double-digit support for Gov. Gretchen Whitmer and Secretary of State Jocelyn Benson in 2022.



Sen. Marsha Blackburn won the Republican nomination for governor, beating TN-06 Rep. John Rose in the primary, and is likely to become the state's first female governor.

Despite President Trump's endorsement, Rep. Andy Ogles (**TN-05**) lost his bid for a third term to former state Agriculture Commissioner **Charlie Hatcher**. This seat remains a solid Republican seat.

For the redrawn **TN-09**, a likely GOP flip, Republican state **Sen. Brent Taylor** will face state **Rep. Justin Pearson**.



Lt. Gov. Peggy Flanagan defeated MN-02 Rep. Angie Craig to succeed retiring Sen. Tina Smith. Flanagan will face **Michele Tafoya** in the likely Democrat seat.

Sen. Amy Klobuchar easily won the Democratic nomination for governor and is highly favored to win the general election. President Trump's pick, MyPillow CEO Mike Lindell, fell short of the Republican nomination to state House Speaker **Lisa Demuth**.

Impacts of Recent Primaries



Florida

Progressive state **Rep. Angie Nixon** pulled off an upset over Alex Vindman to face **Sen. Ashley Moody** for the safe Republican seat.

Ryan Elijah defeated embattled incumbent Rep. Cory Mills for **FL-07**, despite Mills having secured President Trump's endorsement. Democrats face a tougher path of flipping the Trump +12 district without Mills as the nominee.

FL-14 Rep. Kathy Castor will face **Mike Beltran** as she defends her seat in a district that would have voted for Trump by 11 points in 2024. Cook Political Report recently moved the race from Lean Republican to Toss Up.

In the open **FL-19**, **Jim Schwartzel** overcame a late Trump endorsement for Catalina Lauf in a crowded primary for the safe Republican seat.

Redistricting gave **Casey Askar** a slight advantage over **Pia Dandiya** for the redrawn open seat in **FL-22**, but it remains competitive as Biden would have carried the district by three points in 2020.

In the newly drawn toss-up **FL-25**, **Rep. Jared Moskowitz** survived a primary challenger and will face Boca Raton Mayor **Scott Slinger**.



Arizona

AZ-01 is one of the most competitive districts in the country – Trump carried it by 3 points in 2024, and Biden carried it by 1.5 in 2020. **Amish Shah** narrowly lost to outgoing Rep. David Schweikert in 2024 and defeated DCCC-backed Marlene Galan-Woods in the 2026 primary. He will face Trump-endorsed **Jay Feely** in November.

AZ-06 Rep. Juan Ciscomani will fight off challenger **JoAnna Mendoza** in a district that Democrats have carried in recent statewide elections and could determine House control.

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Incumbent Losses

As of 9/11/26

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*

TN-05



**Rep. Andy
Ogles**

*Defeated by
Charlie Hatcher*

FL-07



**Rep. Cory
Mills**

*Defeated by
Ryan Elijah*

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Incumbent Losses

As of 9/11/26

TX-33



**Rep. Julie
Johnson**

*Defeated by
Colin Allred*

TX-18



**Rep. Al
Green**

*Defeated by Rep.
Christian Menefee*

NY-10



**Rep. Dan
Goldman**

*Defeated by
Brad Lander*

NY-13



**Rep. Adriano
Espaillat**

*Defeated by
Darializa Avila
Chevalier*

CO-01



**Rep. Diana
DeGette**

*Defeated by
Melat Kiros*

CT-01



**Rep. John
Larson**

*Defeated by
Luke Bronin*

MI-13



**Rep. Shri
Thanedar**

*Defeated by
Donavan
McKinney*

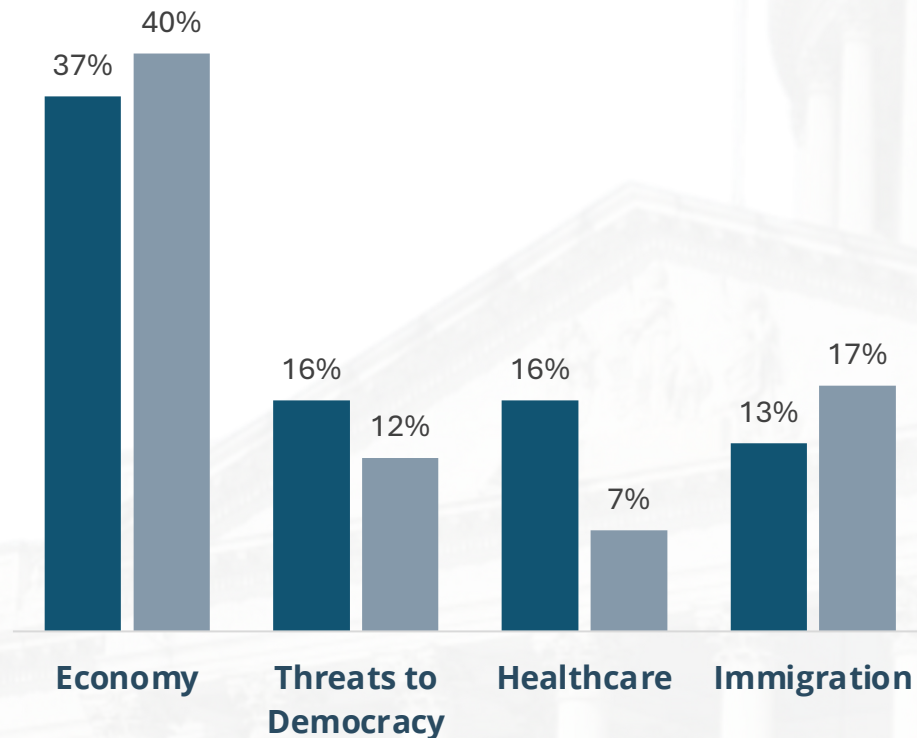


Sen. Michael Bennet (CO) became the first sitting senator to lose a gubernatorial primary since 2010. Since he is not in cycle, **he will remain in the Senate.**

The Electorate

Top Issues for Voters

■ 2026 ■ 2024



*Emerson College polling August 16-17 (2026) and August 12-14 (2024)

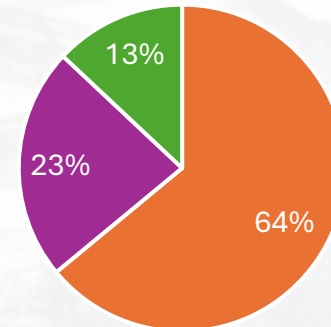
**KFF polling April 14-19, 2026

President Trump has a **33% approval rating** among likely voters. In August 2024, the **economy** was the most important issue to voters, followed by immigration, threats to democracy, and healthcare.

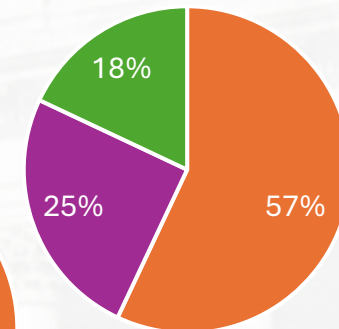
In August 2026, the **economy** remains the top issue for voters, while **healthcare** and **threats to democracy** are tied for second place.

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.**

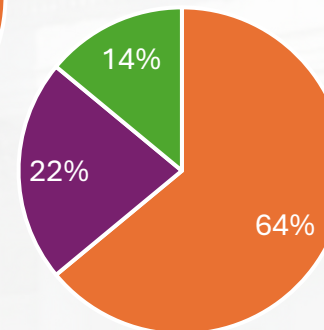
Healthcare Affordability



Food and Groceries



Gasoline and Transportation Costs



■ Concerned
■ Semi-Concerned
■ Not Concerned

Rise of Progressive Candidates

Progressive challengers have unseated incumbents and defeated party-backed candidates in solid Democratic districts and have narrowly secured primary victories in a few key swing seats.

Issue Platform

Medicare for All, housing affordability, immigration and criminal justice reform, data centers, and U.S. support for Israel have become the **focal issues of the progressive wing** of the Democratic party.

Voter Demographics

Progressive candidates in Wisconsin, Minnesota, Michigan, and New York have done well with **young, white, college-educated, and higher income voters** but have struggled to gain the support of **older Americans, Black and Latino voters, and moderates**.

Fundraising & Spending

Despite moderate Senate candidates in Florida, Michigan, and Minnesota Senate races having significant financial advantages from outside spending groups – as well as name recognition and party support – **progressive candidates prevailed** with small-dollar donations and grassroots efforts.

Electability becomes more important in races that could determine House and Senate control, and progressive left candidates face a greater challenger of winning over moderate, older, or independent voters – those who tend to be more reliable in the general election.

Mail-In Voting

As of 9/11/26

In March 2026, President Trump signed an executive order directing the **U.S. Postal Service to verify voter eligibility** and requiring states to submit lists of voters eligible for mail-in ballots.

A federal judge issued two separate injunctions blocking the order.

The Supreme Court lifted the first injunction on a technicality. However, on August 28, the same federal judge imposed a **14-day restraining order blocking USPS from implementing its finalized mail ballot rule**.

The Trump Administration asked the Supreme Court to allow the USPS plan for mail ballots to take effect ahead of midterms. At least **seven states will have begun mailing ballots** by the week of September 13.

EXECUTIVE ORDER 14399

Directs DHS and the Social Security Administration to compile and transmit State Citizenship Lists to state election officials at least 60 days before a federal election

Directs USPS to establish uniform mail-ballot standards, including barcode tracking

Requires states to notify USPS 90 days prior to a federal election on whether they will allow mail or absentee ballots, and provide a list of mail-ballot recipients 60 days before the election

Prohibits USPS from transmitting mail-in or absentee ballots from individuals not on a State-specific list

Instructs the Department of Justice to prioritize investigating election officials who provide ballots to ineligible individuals

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



33%

? - ?

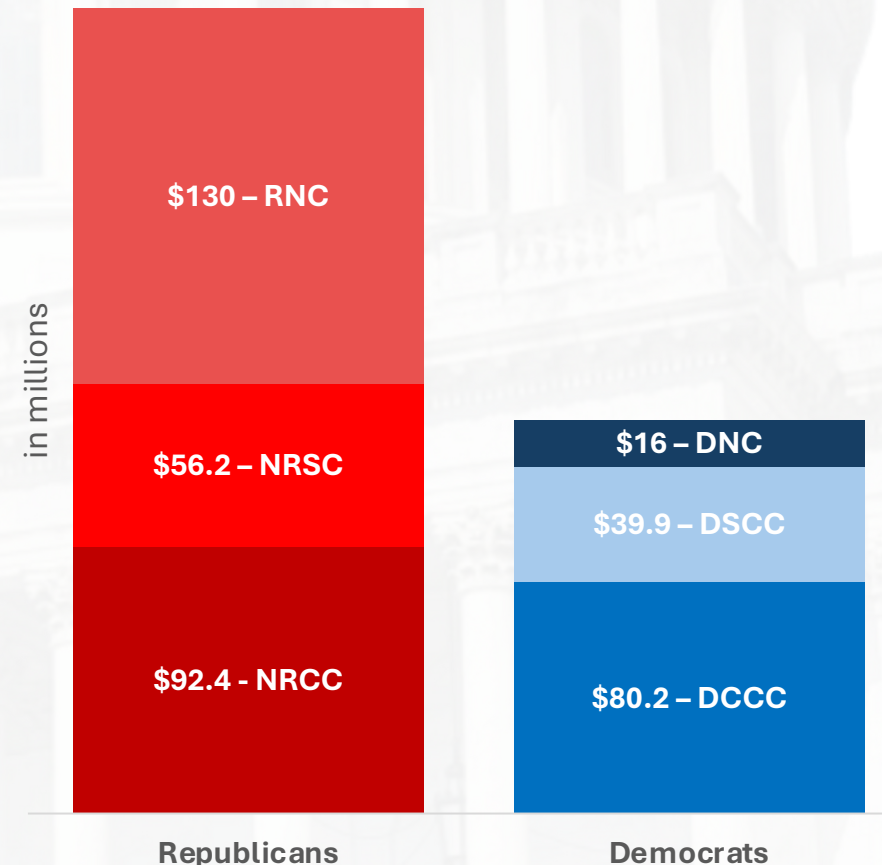
Despite President Biden's low approval rating in 2022, post-2020 redistricting and increased voter turnout in response to *Dobbs v. Jackson Women's Health Organization* helped incumbent Democrats overperform Biden's margins in their districts and offset Republican pickups.

Fundraising and Spending

A June 2026 Supreme Court ruling struck down limits on coordinated spending between party committees and candidates, allowing committees to direct unlimited funds toward candidate campaigns.

- ✓ Republican committees hold a **substantial cash advantage** over their Democratic counterparts. Entering August, **Republicans had \$278.6 million** across the party, House, and Senate committees. **Democrats had a combined \$136.1 million** cash on hand.
- ✓ President Trump's super PAC, MAGA Inc., has roughly **\$400 million** cash on hand and recently announced a **\$10 million ad buy** in the Texas Senate race.
- ✓ Despite the GOP's overall committee cash advantage, **Democratic candidates have outraised Republican opponents** in competitive House and Senate races.
- ✓ Political ad spending is expected to reach **\$11.6 billion**, up more than 20% from 2022. **Healthcare is the top spending issue in competitive Senate races** – Democrats have spent \$32.9 million on healthcare ads and Republicans have spent \$25.8 million.

Committees' Cash on Hand Entering August



120th CONGRESS: SENATE PROJECTIONS

13 Democrat Seats

9 Solid Democrat

1 Likely Democrat
(MN)

2 Lean Democrat
(NH, GA)

1 Toss-Up
(MI)

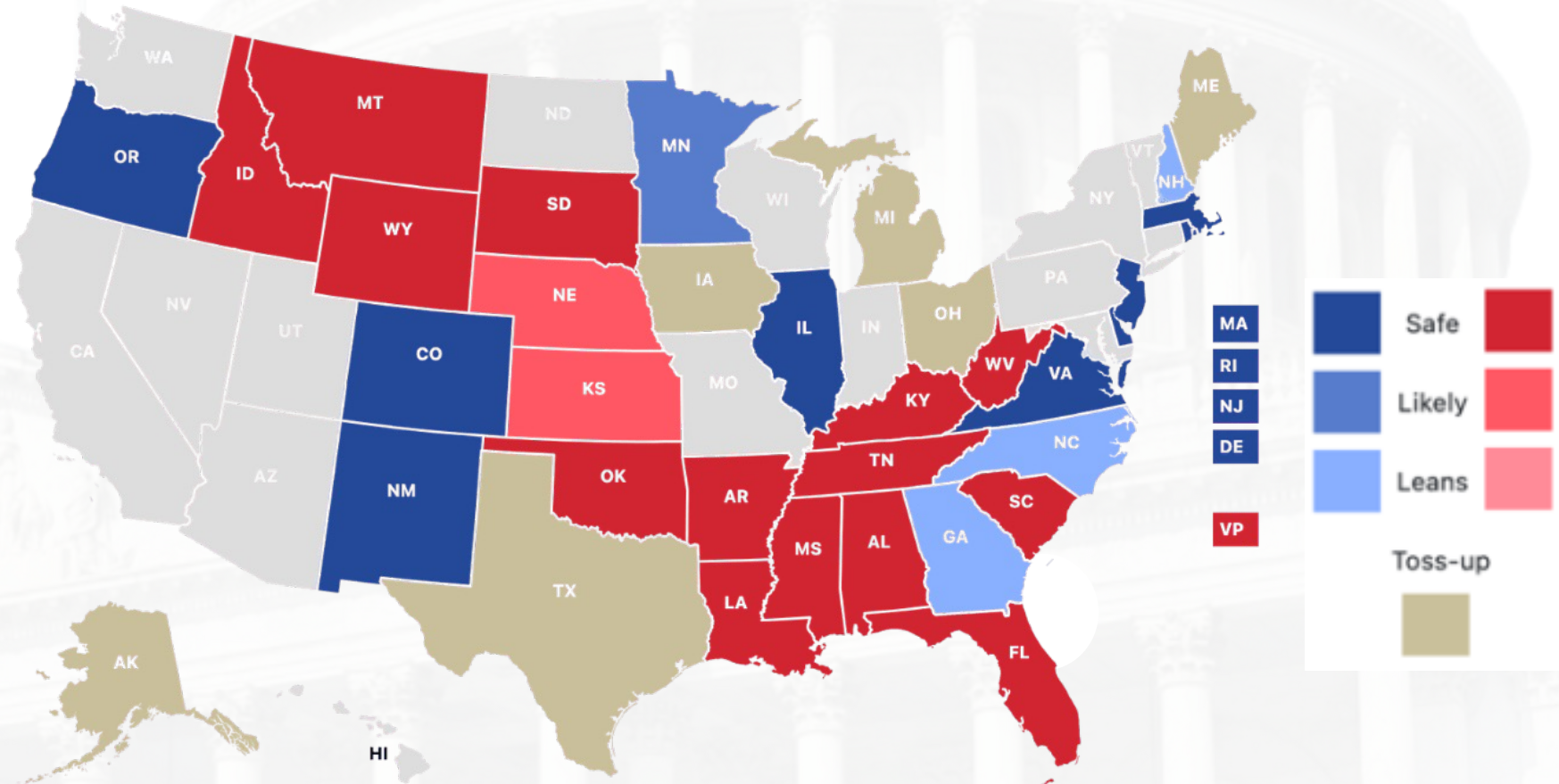
22 Republican Seats

14 Solid Republican

2 Likely Republican
(NE, KS)

5 Toss-Up
(ME, OH, AK, IA, TX)

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



IOWA

Open | Toss Up
Trump + 13.3



TEXAS

Open | Toss Up
Trump + 14



MICHIGAN

Open | Toss Up
Trump + 1.4

Competitive Races



NEW HAMPSHIRE

Open | Lean D
Harris + 2.8



GEORGIA

Ossoff (D) | Lean D
Trump + 2.2

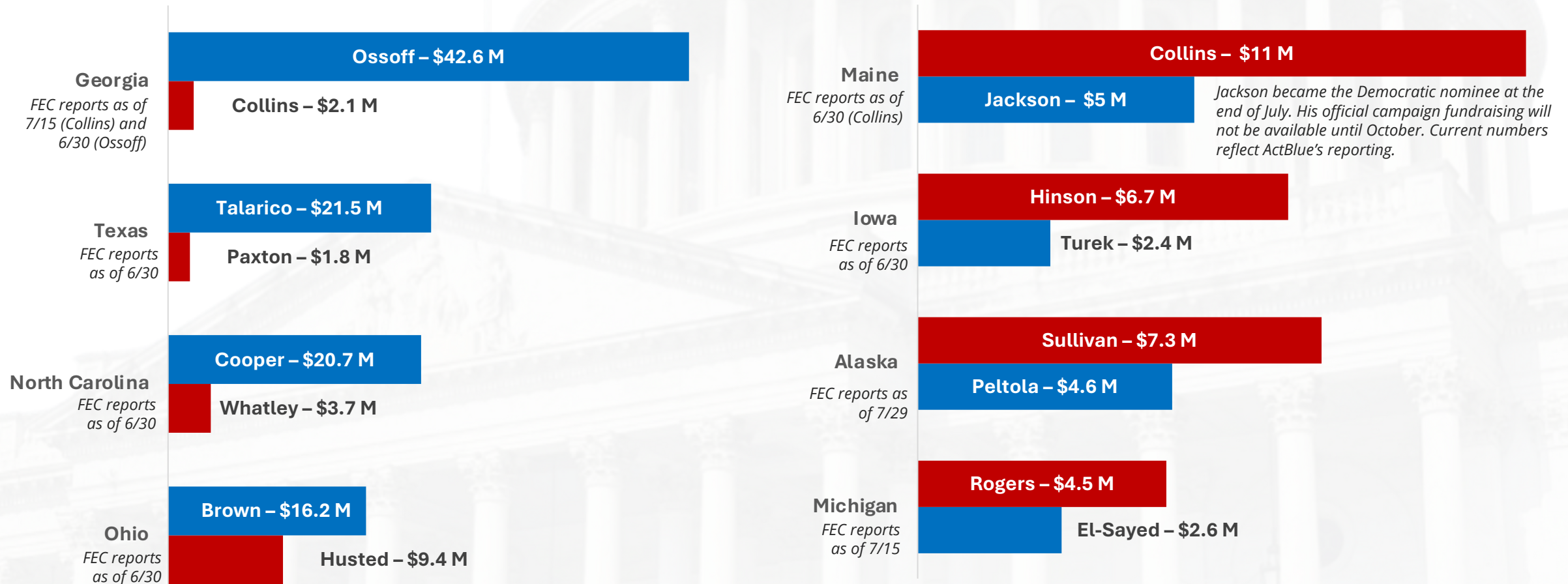


NORTH CAROLINA

Open | Lean D
Trump + 3.2

Senate Candidates' Cash on Hand

All Democrats in competitive Senate races outraised their opponents during the second quarter, though only half currently hold a significant cash on hand advantage heading into Q3.



120th CONGRESS: HOUSE PROJECTIONS

**216 Democrat
Seats**

182 Solid Democrat

4 *Solid Republican*

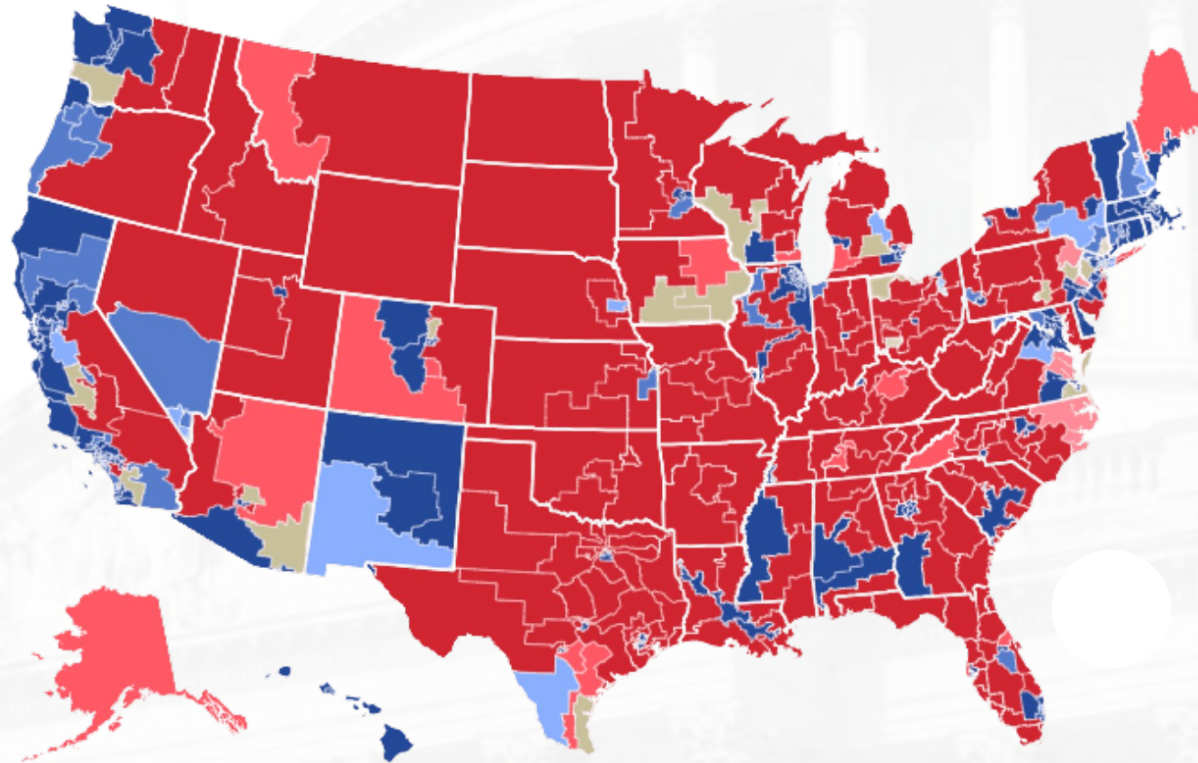
12 Likely Democrat

4 *Likely Republican*

7 Lean Democrat

2 *Lean Republican*

5 Toss-Up



**219 Republican
Seats**

176 Solid Republican

3 *Solid Democrat*

17 Likely Republican

5 Lean Republican

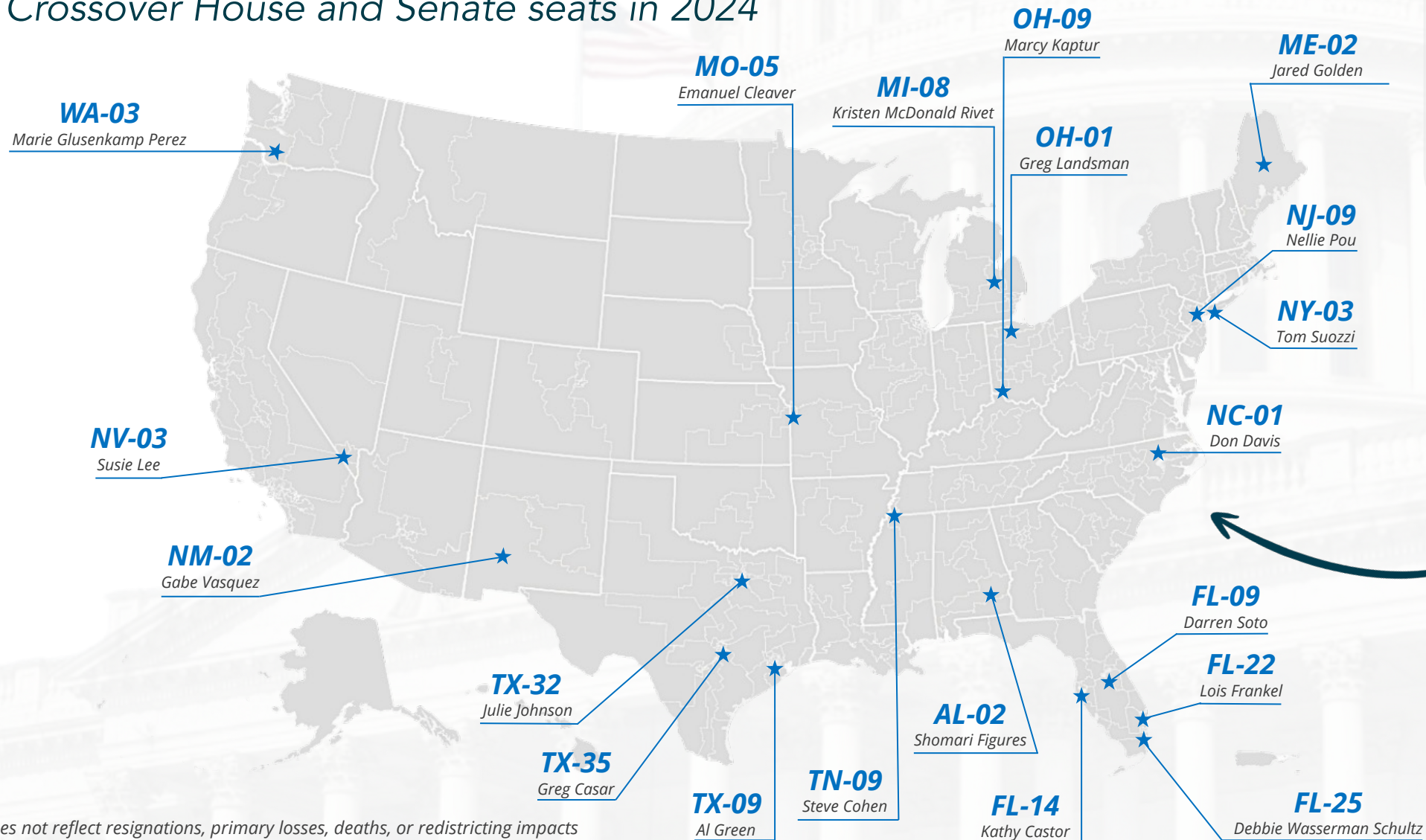
2 *Lean Democrat*

16 Toss-Up

Projected Total: **208** Republican **206** Democrat **21** 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.

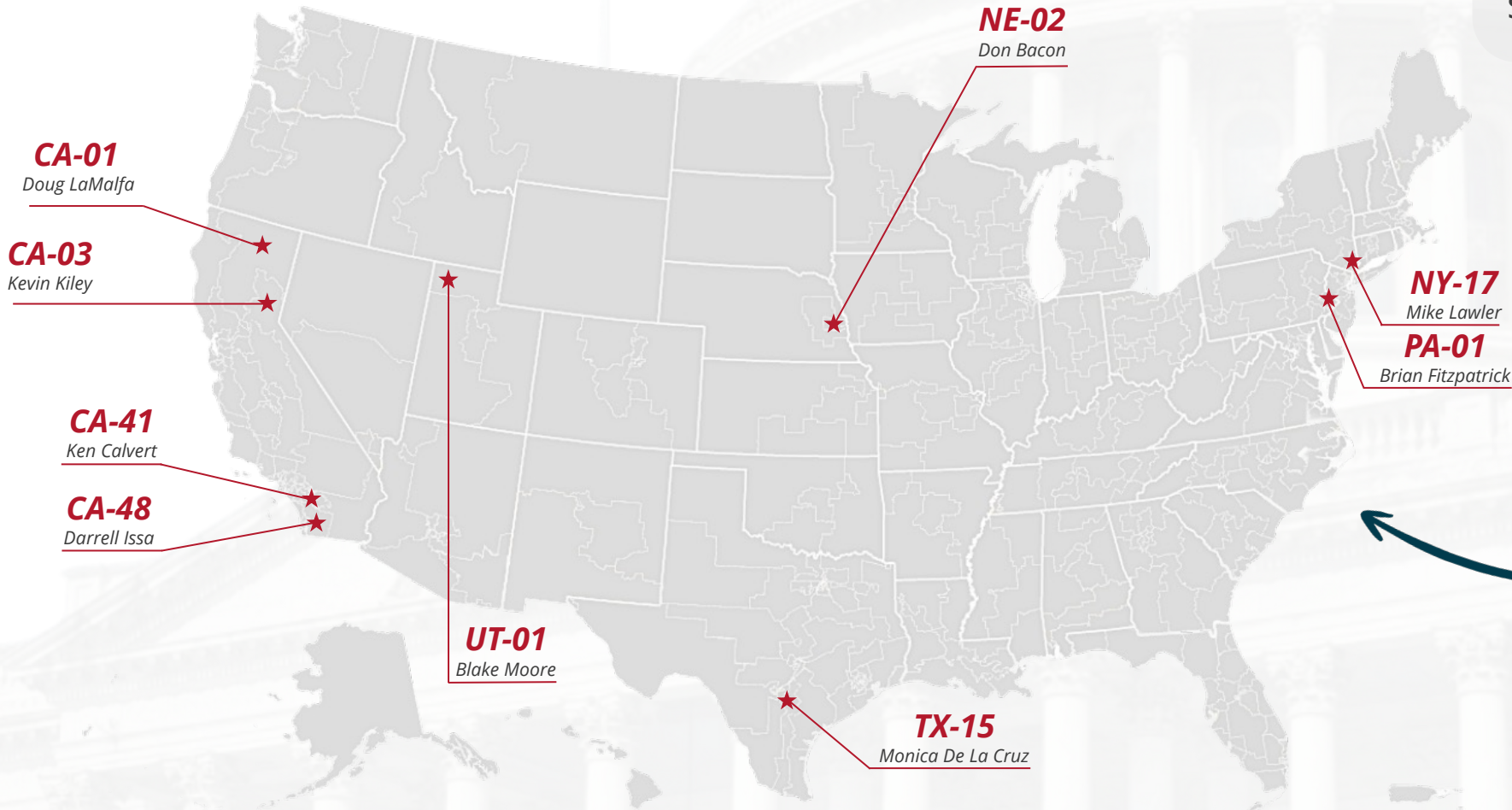
20

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

As of 9/11/26



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 +0	Struck down by U.S. Supreme Court
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)
TN-09	Open (Cohen)
TX-09	Open (Green)
TX-32	Open (Johnson)
TX-35	Open (Casar)

Potential Outcome: GOP net +3

Missouri: After a new map flipped the 5th District into a safe Republican seat, Missouri's Supreme Court directed officials to revert to old district lines. A federal judge then issued a ruling barring the state from using those earlier boundaries. On September 10, the U.S. Supreme Court sided with opponents of the new map, clearing the way for Missouri to keep the districts drawn after the last census – and the 5th District in Democrats' hands.

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.

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 9/11/26

Look Ahead: House Races to Watch

Lean Democrat

CA-13	Gray
CA-48	Open (Issa)
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-14	Castor
FL-25	Moskowitz
IA-01	Miller-Meeks
IA-03	Nunn
MI-07	Barrett
MI-10	Open (James)
NJ-07	Kean Jr.
NY-17	Lawler
OH-07	Miller
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-22	Open (Frankel)
IA-02	Open (Hinson)
MI-04	Huizenga
NC-01	Davis
NC-11	Open (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 | Lean D
Trump + 13.3



GEORGIA
Open | Toss Up
Trump + 2.2



OHIO
Open | Toss Up
Trump + 11

Election Year Disrupters

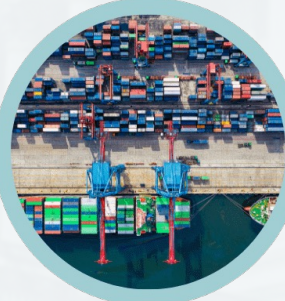
What to lookout for in the second half of 2026 and beyond...



AI and
Data Centers



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.

