

POLITICAL INTELLIGENCE

2026 Midterms

Lay of the land, six months out

Eli Yokley

Analyst, U.S. Politics

 MORNING CONSULT®

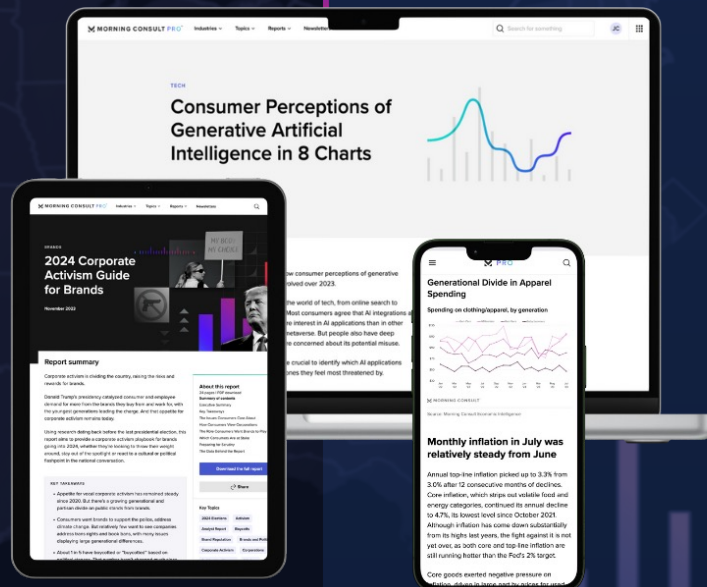




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In this report

01

Historical refresher

02

Lay of the land

03

The issues





Key takeaways

01 · HISTORY

Pattern says Dems gain seats.

Presidential party has lost House seats in 18 of 20 post-WWII midterms — average -25. The only two exceptions (Clinton '98, Bush '02). Cook flags ~36 competitive seats.

02 · LANDSCAPE

Trump's standing has slipped, fast.

Net approval -9 nationally. Trump is above water in just 17 states this quarter — down from 22 in Q4. Generic ballot sits at D+3, behind 2018's same-point pace but inside the historical band that flips the House. Senate map still tilts GOP.

03 · ISSUES

Costs, health care, and a check on Trump.

Trump's immigration mandate collapsed from +20 net to +2 in 13 months; trade flipped +13 → -5. Dems own health care (D+11) — voters' #2 priority with a -26 pt delivery gap. 55% want Congress to check Trump (57% on tariffs — widest MCPI has recorded). Base case: Dem House, GOP Senate.

01

Midterms in Context

History, fundamentals, and where we are today



2026 Midterm Election Calendar

ALREADY HAPPENED

- Feb 5** NJ CD-11 special primary
- Mar 3** TX, NC, AR primaries
- Mar 10** MS primary
- Mar 17** IL statewide primary
- Apr 7** GA-14 special general runoff
- Apr 16** NJ CD-11 special general
- May 5** IN, OH primaries

AHEAD — PRIMARIES

- May 12** NE, WV primaries · NC runoff
- May 19** AL, GA, ID, KY, OR, PA primaries
- May 26** TX primary runoff
- Jun 2** CA, IA, MT, NJ, NM, SD primaries
- Jun 9** ME, NV, ND, SC primaries

AHEAD — CONTINUED

- Jun 16** OK statewide · AL, GA primary runoffs
- Jun 23** MD, NY, UT primaries · SC runoff
- Jun 30** CO statewide primary
- Jul 21** AZ statewide primary
- Jul 28** SD primary runoff
- Aug 4** KS, MI, MO, VA, WA primaries
- Aug 6** TN statewide primary
- Aug 8** HI statewide primary
- Aug 11** CT, MN, VT, WI primaries
- Aug 18** AK, FL, WY primaries
- Sep 1** MA statewide primary
- Sep 8** NH statewide primary
- Sep 9** RI statewide primary (Wed)
- Sep 15** DE statewide primary

Nov 3

GENERAL ELECTION

All 435 House · 35 Senate (incl. 2 specials) · 36 governorships

Generic Ballot: 2026 vs. 2018

Dem advantage by weeks since presidential inauguration · 2026 cycle tracking -2 pts vs. 2018's pace

2018 SAME POINT

D+5

LEAN DEM

2026 NOW

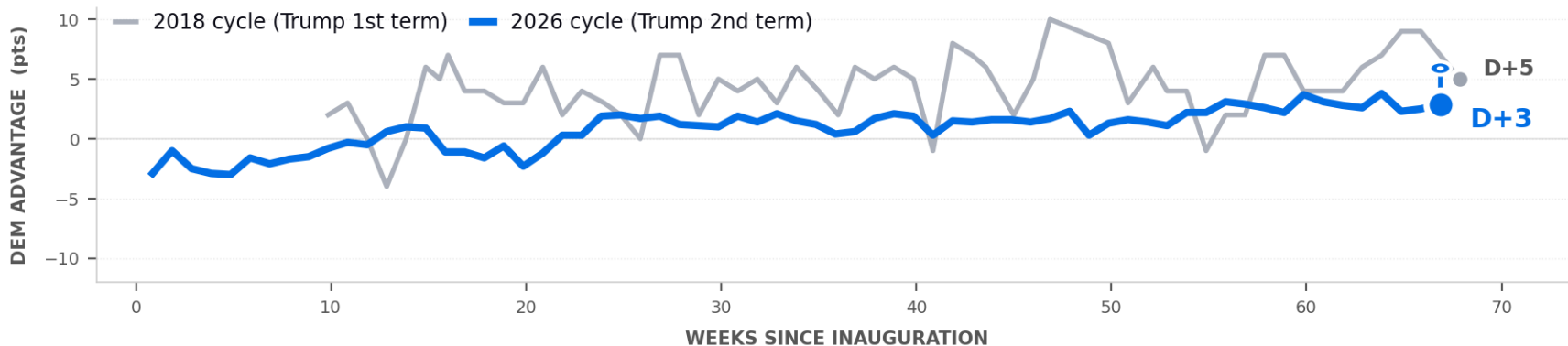
D+3

NARROWER

DIFF

-2

PTS



Every Post-WWII Midterm: The Pattern Holds

18 of 20

midterms · pres. party lost House seats

avg -25

seats lost · all 20 cycles since 1946

Only 2 gains

Clinton '98 (+5), Bush '02 (+8)

| YEAR | PRESIDENT | PARTY | HOUSE SEATS |
|------|------------|-------|-------------|
| 1946 | Truman | ● D | -55 |
| 1950 | Truman | ● D | -29 |
| 1954 | Eisenhower | ● R | -18 |
| 1958 | Eisenhower | ● R | -47 |
| 1962 | Kennedy | ● D | -4 |
| 1966 | Johnson | ● D | -47 |
| 1970 | Nixon | ● R | -12 |
| 1974 | Ford | ● R | -48 |
| 1978 | Carter | ● D | -15 |
| 1982 | Reagan | ● R | -26 |

| YEAR | PRESIDENT | PARTY | HOUSE SEATS |
|------|-----------|-------|-------------|
| 1986 | Reagan | ● R | -5 |
| 1990 | Bush 41 | ● R | -8 |
| 1994 | Clinton | ● D | -54 |
| 1998 | Clinton | ● D | +5 |
| 2002 | Bush 43 | ● R | +8 |
| 2006 | Bush 43 | ● R | -30 |
| 2010 | Obama | ● D | -63 |
| 2014 | Obama | ● D | -13 |
| 2018 | Trump | ● R | -40 |
| 2022 | Biden | ● D | -9 |

02

Current State of 2026

Senate map, House landscape, Trump approval, and the generic ballot



House Battleground · Competitive Districts by State

| STATE | # | COOK SEATS | DJT NET | STATE | # | COOK SEATS | DJT NET |
|--------------|---|-------------------|---------|----------------|---|--------------------------|---------|
| Texas | 5 | TU LD LkR LkR LkR | -3 | Florida | 7 | TU LR LR LkR LkR LkR LkR | +1 |
| California | 5 | TU LD LD LD LkD | -28 | Virginia | 3 | TU LR LkD | -14 |
| Pennsylvania | 4 | TU TU TU LkR | -9 | Ohio | 3 | TU LD LkD | -5 |
| Michigan | 4 | TU LD LR LkR | -14 | Nevada | 3 | LD LkD LkD | -9 |
| New York | 4 | TU LD LD LD | -20 | Colorado | 2 | TU LkR | -18 |
| Arizona | 3 | TU TU LkR | -11 | North Carolina | 2 | LR LkR | -8 |
| Iowa | 3 | TU TU LkR | -7 | Wisconsin | 2 | TU LkR | -15 |

S2 · CURRENT STATE OF 2026

Senate Battleground

GOP defends 21 · Dems defend 14 · Dems need net +4 to flip · 35 seats up incl. FL & OH specials

LEAN / LIKELY DEMOCRAT

| STATE | INCUMBENT | COOK | DJT |
|-----------|-----------------|----------|------------|
| MN | OPEN (Smith↓) | Likely D | -18 |
| NH | OPEN (Shaheen↓) | Lean D | -18 |
| NC | OPEN (Tillis↓) | Lean D | -8 |
| GA | Ossoff (D) | Lean D | -6 |

TOSS-UP

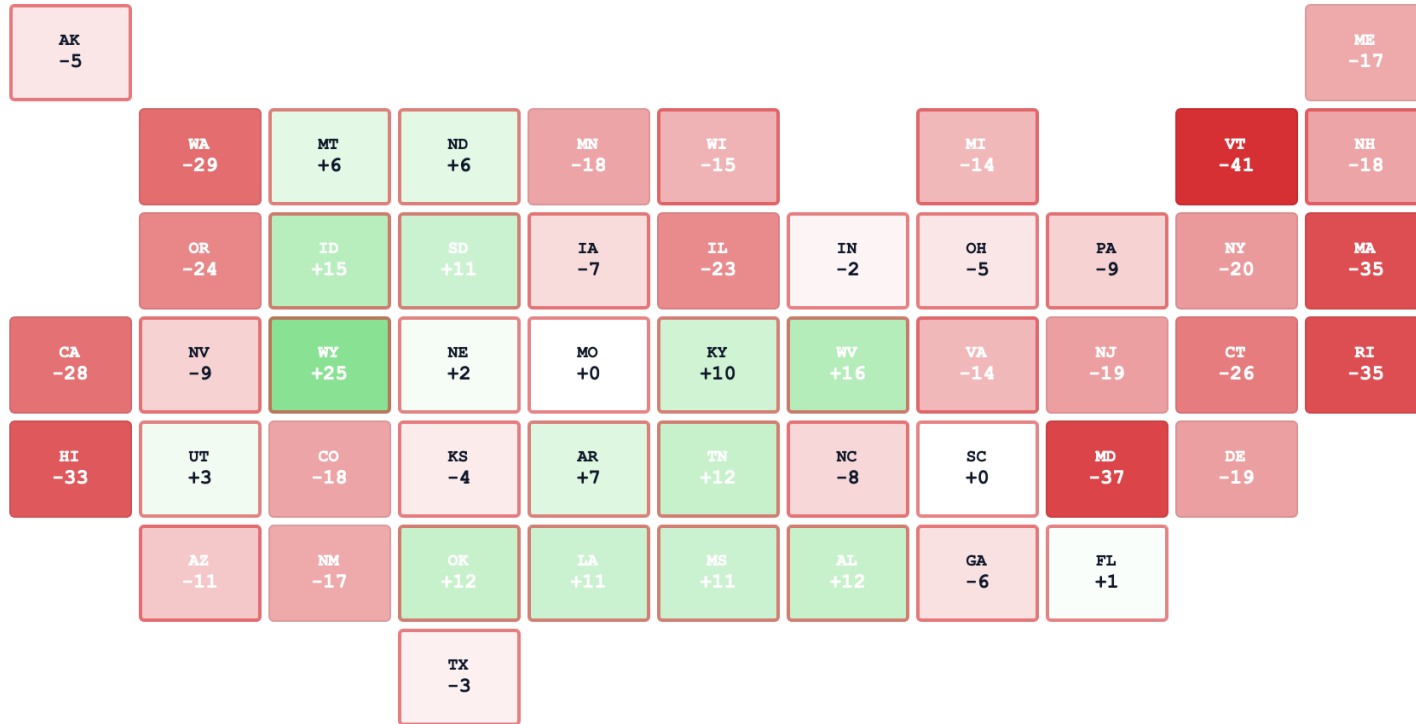
| STATE | INCUMBENT | COOK | DJT |
|-----------|--------------------|---------|------------|
| ME | Collins (R) | Toss-Up | -17 |
| MI | OPEN (Peters↓) | Toss-Up | -14 |
| OH | Husted (R) Special | Toss-Up | -5 |

LEAN / LIKELY REPUBLICAN

| STATE | INCUMBENT | COOK | DJT |
|-----------|---------------|----------|-----------|
| AK | Sullivan (R) | Lean R | -5 |
| IA | OPEN (Ernst↓) | Likely R | -7 |
| NE | Ricketts (R) | Likely R | +2 |
| TX | Cornyn (R) | Likely R | -3 |

Cook Political Report Senate ratings (4/13/26) · DJT net from MCPI Q1 2026 state RV

Trump Net Approval: 50-State Snapshot, Q1 2026



Net Disapprove Net Approve 2024 Trump state

03

Issue Context

What voters care about and who they trust on it

Top Issues Priority — Where the Parties Diverge

PI4 'How important a priority should each be for Trump?' (% top priority)

| ALL VOTERS | | |
|------------|-----------------------------|-----|
| 1 | Bring down prices | 72% |
| 2 | Make health care affordable | 72% |
| 3 | Make energy cheaper | 63% |
| 4 | Reduce federal deficit | 52% |
| 5 | Stop illegal immigration | 39% |
| 6 | Counter foreign adversaries | 38% |

| DEMOCRATS | | |
|-----------|-----------------------------|-----|
| 1 | Make health care affordable | 83% |
| 2 | Bring down prices | 80% |
| 3 | Make energy cheaper | 70% |
| 4 | Reduce federal deficit | 53% |
| 5 | Counter foreign adversaries | 34% |
| 6 | Regulate tech companies | 33% |

| REPUBLICANS | | |
|-------------|--------------------------------|-----|
| 1 | Stop illegal immigration | 66% |
| 2 | Bring down prices | 64% |
| 3 | Make health care affordable | 64% |
| 4 | Make energy cheaper | 60% |
| 5 | Deport undocumented immigrants | 56% |
| 6 | Reduce federal deficit | 53% |

Republicans Lack Voter Trust On Many Issues

-9

Trump approve

D+3

















Generic ballot

-15

GOP right track

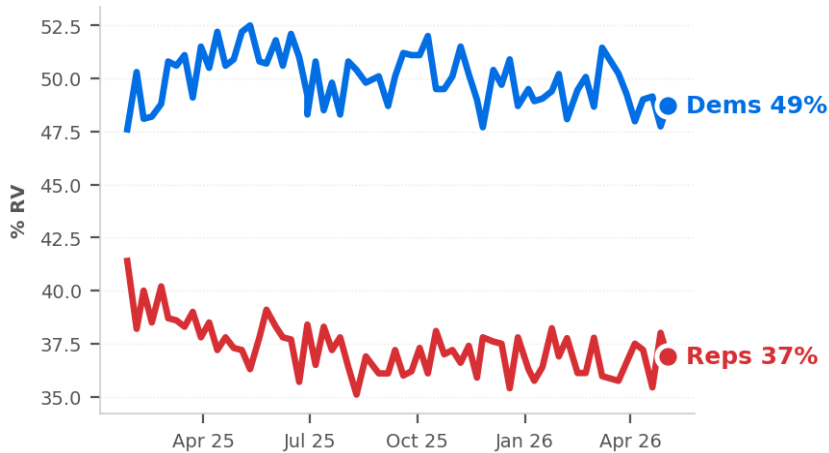
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States Trump's above water
(was 22 in Q4)

| ISSUE | DEM TRUST | | REP TRUST | | NET | BUCKET |
|----------------|---|-----|--|-----|-------|--------|
| Health care |  | 49% |  | 37% | D+11 | DEM |
| Energy |  | 45% |  | 39% | D+6 | DEM |
| Economy |  | 44% |  | 42% | ~Tied | TIED |
| Taxes |  | 42% |  | 42% | Tied | TIED |
| Foreign policy |  | 42% |  | 42% | Tied | TIED |
| Trade |  | 42% |  | 42% | Tied | TIED |
| Immigration |  | 40% |  | 47% | R+7 | GOP |
| Nat'l security |  | 40% |  | 45% | R+5 | GOP |

GOP's health care advantage has weakened

Congressional trust on health care · % RV



Trump approval on health care · net (approve – disapprove)



Amid energy crunch, AI data centers are the fastest-rising blame factor for high electricity prices.

"How responsible are each of the following for the increasing price of electricity?" — % saying VERY responsible, RV

AI data centers

24.4% → 38.5%

Insufficient energy production

24.1% → 33.7%

Infrastructure costs

23.7% → 31.6%

Government regulations

29.4% → 37.1%

Extreme weather

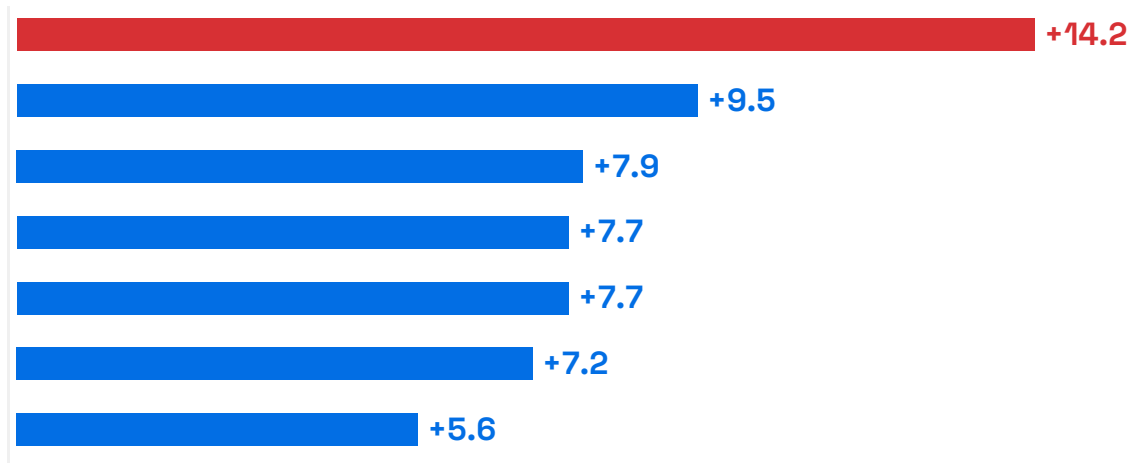
16.6% → 24.3%

Inflation

39.2% → 46.4%

Electric vehicles

16.3% → 21.9%



Trump's immigration mandate has eroded to a dead heat

Trump approval on immigration · net (approve – disapprove) · weekly RV



Trump's trade approval remains in the red

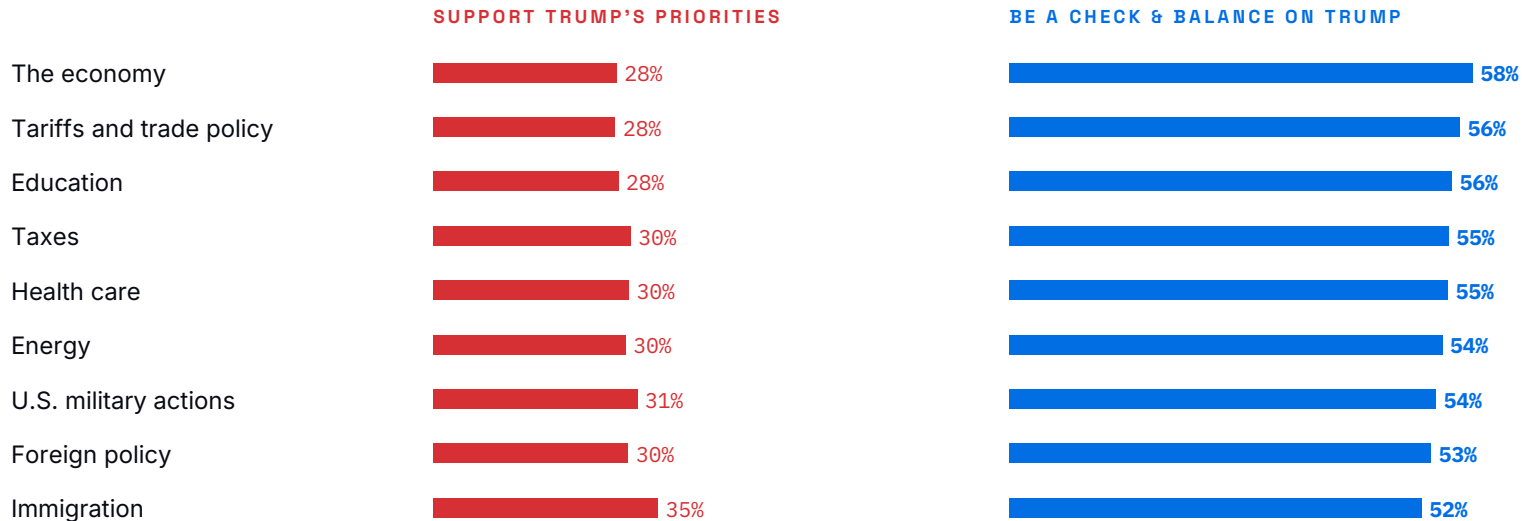
Trump approval on trade · net (approve – disapprove) · weekly RV



Net flipped from +12.7 at inauguration to -5.0 now · upside-down on tariffs

Across every issue tested, voters want Congress to check Trump.

"Should Congress focus on supporting Trump's priorities, or focus on being a check and balance?" — March 2026 RV





Two Pathways: Gridlock or Status Quo

PATHWAY A · HIGHEST PROBABILITY

Dem House / GOP Senate

- Dems flip ~20 seats given Trump malaise and pricing unease
- GOP holds Senate on favorable map
- Investigations: tech, AI, crypto, health care, Trump and those alongside him.
- Trump admin regulations = risk pathway.

PATHWAY B · MEDIUM PROBABILITY

Dem Sweep (House + Senate)

- Requires candidate-quality wins in ME + IA
- Unified Dem Congress 2027. Aggressive oversight.
- More fights with Trump over funding, real pushback.
- Public opinion risk for targeted industries.

PATHWAY C · LOWEST PROBABILITY

GOP Holds Both Chambers

- Requires economic stabilization + external event.
- **Historically rare** below 50% approval.
- Health care a challenge as MAHA Rs push reg regardless.
- Voters want cost/health action from GOP too.



METHODOLOGY

How this report was built

MCPI WEEKLY TRACKER

Topline approval, issue trust, priorities, and favorability come from Morning Consult's Political Intelligence weekly tracker — registered voters ($n \approx 2,000+$ per wave).

MCPI MONTHLY SURVEY

Deeper issue cuts — immigration deep dive, tariff sentiment, costs and blame, congressional pushback — come from the MCPI monthly survey, registered voters ($n \approx 2,200$), with month-over-month trended sections.

CITED SOURCES

House and Senate race ratings: Cook Political Report, current as of latest update (cited on slides 9–10). Primary calendar: Ballotpedia 2026 elections calendar plus public special-election results.



About the author

Eli Yokley is Morning Consult's U.S. Politics Analyst, translating high-frequency polling data into clear reads on where American public opinion is heading — and what that means for the people making decisions at the center of political and corporate power.

Eli has provided analysis on Bloomberg, CNN, CNBC, MSNBC, and SiriusXM, writes the company's flagship politics briefing, and produces strategic intelligence relied on by C-suite leaders, government affairs teams, top diplomats, and key White House and Congressional staff on both sides of the aisle.

Eli started covering Missouri politics at 18 — launching his own site from Joplin, and reporting from Ferguson for The New York Times. The Columbia Journalism Review called him a prodigy. He joined Morning Consult in 2016 from CQ Roll Call, where he covered House and Senate campaigns after five years on Missouri politics while studying at the University of Missouri, including contributions to Politico and The Daily Beast.

CONTACT: eyokley@morningconsult.com

SPEAKING/MEDIA: press@morningconsult.com





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