POLITICS

Forecasting the 2026 US Midterm Elections

Special Occasions? When Mid-Cycle Contests Predict Congressional Elections, and When They Don't

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Abstract

A common debate among political forecasters is whether the outcomes of special elections should be considered as precursors to similar outcomes in general elections. This debate has received only limited attention in the academic literature. This study closes this gap by situating special elections in today's highly nationalized partisan environment. Leveraging detailed special election results covering the 2014-2026 congressional election cycles, I compare Democrats' overperformance in special elections (relative to prior presidential election outcomes in these districts) with their eventual overperformance on the same measure in November general elections. I find that special elections are largely reflective of general elections, particularly during midterm election cycles and in competitive districts. These patterns point to likely success for Democrats in the 2026 midterms based on special election outcomes thus far in the cycle. However, I also caution strongly against relying solely on special election outcomes as a prognostication method.

This is a "preproof" accepted article for *PS: Political Science & Politics*. This version may be subject to change during the production process.

DOI: 10.1017/S1049096526102753

In January of 2010, Massachusetts State Senator Scott Brown, a Republican, shocked the political world by winning a special election to the U.S. Senate in one of the most consistently Democratic-leaning states in America. He was elected to a seat that had been held for decades by the "liberal lion" Ted Kennedy, who had passed away in 2009. The policy stakes of Brown's election couldn't have been higher: Senate Democrats lost their 60th member, dooming their ability to pass President Obama's healthcare reform package on a party-line vote over a Republican filibuster. Although Democrats did still end up passing a slimmed-down version of the legislation through the reconciliation process, it eventually became clear that Brown's surprise victory in the special election was forewarning a different calamity for the Democratic Party: a "red wave" wipeout in the 2010 midterm elections later that year.

But do special elections actually serve as useful forecasting tools in advance of general elections? What are their benefits, drawbacks, and complications? How predictive have special election outcomes been in recent, highly nationalized midterm elections? These are the questions this paper begins to answer. Leveraging congressional and state legislative special election outcomes spanning the 2014 – 2026 election cycles, I investigate the extent to which outcomes in special elections are reflective of congressional general election outcomes. I find that on average, relative partisan over- and under-performance in these elections in a given cycle is correlated with how the parties eventually perform in the general election later that cycle. I also explore what these previous trends indicate for 2026.

However, crucial caveats abound that forecasters should keep close to mind: for example, special elections appear to be far more predictive of eventual general election outcomes in

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midterm elections compared to presidential years, with the 2024 presidential election as a clear directional outlier. The predictive power of special elections is also highly heterogeneous in its errors: for example, Democrats' eventual success is significantly overestimated in special elections held in safely Republican districts, and underestimated in safely Democratic districts.

However (and usefully, from the standpoint of predicting key midterm race outcomes), specials held in closer "battleground" districts are much more tightly correlated with eventual midterm outcomes in similarly-competitive U.S. House races, and much less likely to over- or understate Democratic success. For Democrats — who in 2025 and 2026 are faring twice as well in these districts' special elections than during the 2018 cycle — a continuation of these trends could translate into a decisive retaking of the majority in the U.S. House, even with changes stemming from this cycle's mid-decade gerrymandering accounted for.

What's So Special About Special Elections?

Special elections serve an important purpose: they patch the hole of representation created by a vacancy due to exogenous shocks like death, resignation, or even expulsion from a legislative body. They are, as Gaddie et al (1999) describe, a "substantial source of new members of Congress." (103) These elections can and sometimes do result in changes in the party representing the seat; and, as with Sen. Brown, they can have seismic legislative and representational impacts in the near-to-medium term. But in reality, these "flips" are rare and usually end up reverting to the partisan mean in future elections. In this way, special elections may not be particularly "special", but rather, as Studlar and Sigelman (1987) put it, "manifestations of normal partisan forces, operating as usual in the district." (249) In other words, these elections may be "special" in terms of their timing, but on the whole quite normal in

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terms of the fundamental predictors of their outcomes: namely, local forces like partisan balance, racial composition, and socioeconomic status of the district in question.

Although special elections "resemble off-year elections in many respects" (Sigelman 1981, 577), there are a few differences between these contests and their general election counterparts that clarify the limitations of using them as a barometer for congressional elections. All 435 regular U.S. House general elections conclude en masse, and all on the same day. Meanwhile, special elections take place at irregular intervals, usually at the discretion of governors, making them potentially sensitive to current events. Similarly, these elections by definition only take place where vacancies have occurred, and thus are necessarily less representative of the nation. Perhaps because of their idiosyncratic timing, special elections also tend to have lower turnout than regular midterms, or particularly presidential contests (Berry and Gersen 2010). As a result, it can be difficult to tell whether particular out-of-the-ordinary results in specials (like Sen. Brown's) are due to turnout of highly motivated partisans, the persuasion of independents and voters from the other party, or a mix of both.

Still, special elections do have key advantages over traditional polling and other methods of forecasting congressional elections. Although polls do their best to approximate voters' political attitudes, elections *reveal* these stated attitudes (or perhaps contradict them) through voters' actual, observed behavior of the sort that forecasters attempt to predict in November. Generally, this is preferable to posing a hypothetical matchup in opinion polls, which are getting more difficult than ever to conduct effectively (Prosser and Mellon 2018).

Turnout differences between special elections and presidential elections are notable, and on average have seen about half of votes cast compared to those districts' most recent

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presidential contests (see Figure 1). However, turnout compared to most recent midterm elections are much higher, typically reaching around 70% of midterm turnout in those districts.[1]

Figure 1: Average U.S. House Special Election Turnout as Percent of Prior District Turnout by Decade

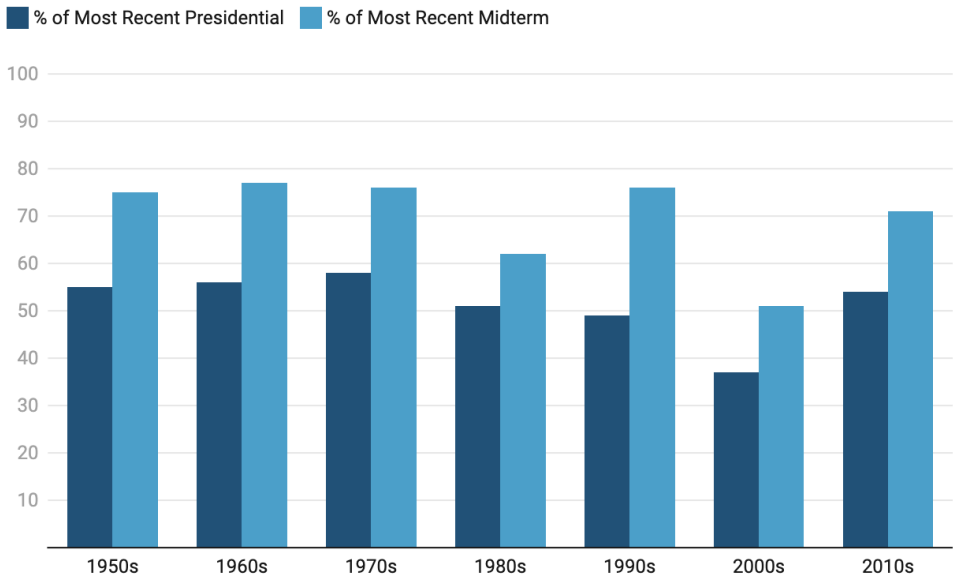


Figure 1: Average turnout in U.S. House special elections as a percentage of turnout in the most recent prior presidential and midterm elections in those districts, aggregated by decade. Measures were created by dividing the total votes cast in a district's special election by the total votes cast in the district's most recent presidential and midterm contest.

Source: CQ Voting and Elections Collection

[1] Some special elections were not included in summary calculations, including districts that were not yet formed in the previous corresponding presidential or midterm election cycle; and districts that did not include nominees from both major parties in the general elections of either the special, or its corresponding prior presidential or midterm election cycle.

Nationalization, Presidentialization, and Special Elections

Earlier work studying special elections focused appropriately on the idiosyncrasies of special elections compared to general congressional elections (Gaddie et al. 1999; Sigelman 1981; Studlar and Sigelman 1987). These works largely emphasized the importance of localized factors: that because congressional elections generally were traditionally so dependent on candidate-specific characteristics, as well as *local* issues and electorates, special elections couldn't tell forecasters very much about the *national* environment. The lack of an incumbent, for example, made them at best comparable only to open-seat contests for Congress, "when partisan tides and the focus of a national campaign are absent." (Gaddie et al 1999, 110)

I argue that the last two decades of a more nationalized, polarized, and hyper-partisan electoral environment have rendered these analyses useful in theory but largely outdated. Declining incumbency effects (Jacobson 2015), polarization in congressional constituencies (Fowler 2024), and increasingly loyal partisan voting on the basis of presidential outcomes in both Congress (Carson, Sievert, and Williamson 2024; Sievert and McKee 2019) and state legislatures (Lynch 2023; Zingher and Richman 2019) have served to make nationalized, presidentialized partisanship a more consistent cue for voters, and thus a more reliable predictor of election outcomes, across the board. This undoubtedly includes special elections. Knotts and Ragusa (2016) have found increasing evidence of nationalization: namely, the predictability of special election outcomes in isolation based on contemporary presidential approval ratings.

Comparatively little work, however, has explicitly examined whether special election outcomes are predictive of a cycle's general election outcomes in and of themselves, especially during our more recent period of nationalized partisanship. Those that have tested the proposition have found mixed-to-positive results. Using a pooled sample of special elections from 1900-2006, Smith and Brunell (2010) compared the proportion of U.S. House special elections won by a party in a given cycle with the party's seat gains in the general elections and found no positive associations. However, they did find significant positive correlations between the number of seats "flipped" in favor of a party and that party's eventual seat gains. Bullock and Owen (2021), with more recent special election data through the 2018 cycle, also shows suggestive evidence of similar correlations. And in Kondik's (2021) study of several decades of U.S. House special elections offer the relevant contextual insight that special elections most often break against the party in power in Washington.

These works are useful entries into the literature, but suffer from a number of methodological drawbacks that make it difficult to draw definitive conclusions. First, both studies (and nearly all other related studies) limit their examination to special elections to the U.S. House itself. This is a sensible choice, given the focus on seat gains in Congress as the dependent variable. However, this leaves researchers with only a small handful of cases to examine each cycle, more often than not in the single digits across a two-year election cycle. Such a limited number of per-cycle observations greatly increases the possibility that findings are due to idiosyncratic features of a small number of candidates or districts. Moreover, both of these previous predictive studies use coarsened measures like "number of special elections won" or "number of partisan flips" per cycle, the latter condition being even rarer than the former.

In this study, I aim not to comprehensively model the predictive power of special elections using multivariate analysis, but rather to update the literature's assumptions about which special elections matter, how they matter, and what their outcomes are really telling us using significantly improved data. This includes significant changes in how we frame the importance of special elections. By including aggregated special election outcomes as predictor variables, paired with aggregated general election results as outcome variables, previous literature has largely positioned special elections alongside other independent variables like presidential approval, district partisanship, economic conditions, candidate characteristics, or other common predictors of congressional elections supported by the literature. But this assumption is inherently flawed. Special elections are not exogenous events: rather, they are shaped by many if not most of the same predictors of general congressional elections, particularly in a nationalized era of partisan politics. As such, specials are not independent predictors of general elections per se, but are a set of "canaries in the coal mine" that reflect the nation's political mood in specific times and places leading up to the more comprehensive set of general elections to Congress. Thus, special election outcomes should be treated neither theoretically nor methodologically as independent causes of November election outcomes. As a result, I will be using a primarily descriptive methodological strategy that simultaneously improves on methodological approaches of previous work in substantial ways.

Data & Methods

This study departs from previous ones first in widening the breadth of special election observations to include specials at the state legislative level during the time period of the study:

the 2014-2026 election cycles.[2] The significant aforementioned nationalization of electoral politics leading up to this time period, particularly at the state legislative level, merits the inclusion of these races, as the influence of district-level partisanship has made outcomes in these races more reliable and predictable across states in the same manner as U.S. House or Senate elections. Thus, observations that would have totaled only 52 from the 2014-2026 cycles now total 566 (Table 1).[3]

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Table 1: Number and Types of Special Election Observations Per Cycle, 2014-2026

Election Cycle	U.S. House	U.S. Senate	State Leg. (Lower)	State Leg. (Upper)	*Per-Cycle Total*
2014	7	0	31	11	*49*
2016	4	0	32	16	*52*
2018	8	1	77	39	*125*
2020	7	0	52	23	*82*
2022	10	0	51	23	*84*
2024	8	0	42	13	*63*
2026	7	0	61	43	*111*

A second and related methodological step forward is the use of district-level presidential election results as the comparison point to adjudicate whether special election outcomes mirror eventual midterm elections. Presidential vote shares broken down at the congressional district

[2] The true time period of the study is 2013-2026, since the 2014 cycle's special elections span from January 2013 – November 2014.

[3] In the results that follow, it is true that, because of the significant imbalance in favor of state legislative outcomes compared to congressional ones (514 vs. 52 spanning the 2014-2026 cycles), the state legislative special outcomes are the much more significant driver of these results. Figure A1.1 shows that congressional outcomes (which typically only constitute single-digit totals per cycle) are clearly more noisy than their state legislative counterparts. However, in all instances besides the 2022 cycle, congressional special election outcomes are directionally consistent with the state legislative ones.

level is not a widely available metric for election cycles earlier than the 1990s; for state legislative races, few are widely available for elections prior to the Obama presidency. The source for these district-level presidential outcomes, as well as the state legislative special election outcomes for this study, is the prominent election data and commentary website The Downballot (formerly DailyKos Elections).

Political analysts largely agree that the best available comparison point for a special election is the results for the most recent presidential election in that same district. First, the nationalization of party politics makes it natural to compare congressional elections to the only truly national election in the U.S., around which partisan attitudes are so sharply and obviously polarized. There are startlingly few members of Congress representing states or districts that voted for the other party for president, and correlations between presidential and both congressional and state legislative votes have reached modern highs during the election cycles leveraged in this study.

Second, using presidential results creates the same baseline comparison for all races. Many previous studies have used, for example, a district's congressional results in a prior election; but this creates extreme error and variation both between districts and over time. Candidates can run unopposed in one election, and face a challenger in the next; and in the context of special elections, any cycle may feature a series of specials that are taking place largely in one specific type of district. By comparing all special election results in a cycle (and all eventual general election results) against the same prior election environment, with the same (presidential) candidates used as the comparison point across districts, we drastically increase reliability and generalizability.

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Finally, and perhaps most importantly, recent midterm elections have typically served as a referendum on the party in power, particularly the president. That is, in trying to measure how voters are reacting to Trump's second term in 2026, it is sensible to measure their behavior against the last time Trump was on the ballot in 2024.

Results

This study's main analytical strategy is to compare Democratic overperformance in mid-cycle special elections with their eventual overperformance in the general congressional elections that punctuate the cycle. In all instances herein when discussing "partisan overperformance", I will be referencing the Democrats' margin of victory in a special election as compared to the most recent Democratic presidential candidate's margin in that particular district. For example, a Democrat winning a special election in the 2026 cycle by two points in a district Kamala Harris lost by six points in 2024 would signify an 8-point Democratic overperformance.

Comparing outcomes at the more granular percentage-point level is an improvement on previous work, which has largely analyzed specials based on binary wins and losses, or more notably "seat flips" from one party's control to the other's. This latter method is useful in some instances, but is a highly coarse and highly imprecise measure; for example, it does not take into account signals from safe, "unflippable" districts which may nevertheless see double-digit overperformance on the part of one party or the other. Conversely, an already-competitive seat can "flip" from one party to the other with only a modest improvement by the winning party.[4]

[4] Additionally, special election data from The Downballot only contains party "flip" information for the 2018-2024 election cycles. Even so, there is a strong Pearson correlation score (.83) between the proportion of special election "flips" that go to Democrats and their eventual overperformance in U.S. House elections. For reference, the 2026

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As will be demonstrated, the comparison gives clear shape to the broader partisan environment, particularly in midterm cycles over the past decade-plus that have demonstrated thermostatic partisan reactions to the president in power (Grossmann and Wlezien 2024). Figure 2 compares the average Democratic overperformance in special election districts (blue) to the Democrats' eventual overperformance in the nationwide U.S. House popular vote relative to the prior nationwide presidential popular vote (orange). Democrats' overperformance in the 2026 special elections thus far is also depicted, as the 2026 midterm outcomes have not occurred yet as of submission.[5]

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cycle's special elections resulted in 31 flips in favor of Democrats, and zero in favor of Republicans — 100% of all special flips. The 2018 cycle, by comparison, saw 83% of flips go in Democrats' favor; the 2022 cycle, 24%.

[5] It is notable, however, that at 13 percentage points, Democrats' 2026 special election overperformance is larger on average in absolute terms than any modern cycle for either party.

Figure 2: Average Democratic Overperformance in Special Elections and Eventual U.S. House Popular Vote, 2014-2026

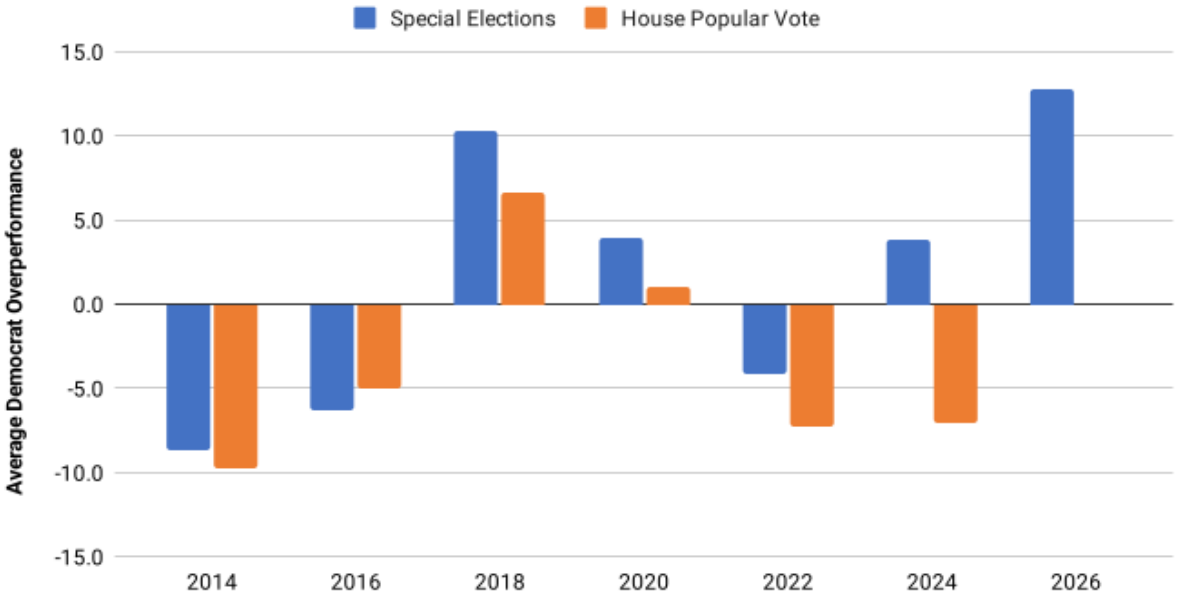


Figure 2: By-cycle averages of Democratic overperformance of presidential results in special elections (blue) compared to overperformance in the eventual U.S. House nationwide popular vote in the November election.

Sources: CQ Voting and Elections Collection/The Downballot

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Several initial patterns stand out. First, the general patterns of over- and underperformance by Democrats in these cycles, both in special elections and the House popular vote, largely reflect our broad understanding of the partisan mood in these cycles.[6] The 2014 and 2022 cycles were seen as thermostatic rebukes of Democratic presidents (Obama and Biden respectively), while 2018 was the same for President Trump, a Republican. Second, presidential contests appear to be more of a mixed bag than midterms. The 2024 cycle in particular is a clear

[6] When subsetting these results by off-year versus on-year special election contests (on the suspicion that elections closer to the eventual U.S. House vote might be more accurate), I find no obvious or consistent patterns. Only 2014 and 2024 show significant differences between off-year and on-year specials in terms of Democratic overperformance; in 2014, the off-year average is closer to the eventual House popular vote; and in 2024, the on-year average is closer. In all other cycles, the off-year average is technically closer, but only marginally.

exception to this pattern of general elections closely following special election results: Prior to the general election, Democrats overperformed Joe Biden's 2020 margins in special elections by an average of 4 percentage points, but ended up underperforming nationally by 7 percentage points in the November House elections. Notably, nearly all of the special elections during the 2024 cycle took place prior to Donald Trump's assassination attempt, as well as Joe Biden's decision to drop out of the race in the summer of 2024. Both events shook up the 2024 election cycle so fundamentally that special elections and other political events before them may not have ended up signifying much at all (Godwin and Dorssom 2025).

The 2016 and 2020 cycles appear at least to be directionally consistent. But further evidence suggests that special elections are more reflective of general election results in midterms compared to presidential cycles. After all, like special elections, midterm contests tend to turn out fewer but more engaged voters than presidential years (Jackson 2000; Wattenberg and Brians 2002). This finding, combined with the turnout findings in Figure 1, indicate that the district electorate in special elections is much closer in both size and type to a midterm congressional election than it is to the presidential electorate, the latter of which typically includes many more lower-propensity voters.

Although useful as a general overview, the averages in Figure 2 are nationwide in scale, and do not consider district type. For example, it would be reasonable to expect Democrats to see larger overperformances in heavily Republican districts, where there is more room for growth in their vote share, compared to heavily Democratic districts, where many Democratic candidates are mathematically unable to increase their vote shares by more than a few percentage points. Furthermore, special election outcomes may matter most or be less prone to predictive error in more competitive districts, which are more likely to see greater campaign spending and media

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coverage than lopsided special elections; as a result, special elections should more closely mirror the conditions of general congressional elections as a whole.

These suspicions are largely confirmed when breaking down both special elections and eventual U.S. House general elections by the partisan balance of the district via prior presidential election outcomes. Subtracting Democrats' average overperformance in U.S. House elections from each of these categories from their average overperformance in that cycle's special elections from the corresponding categories, gives us the average "error" in those district types on a per-cycle basis. In Figure 3, bars above zero indicate categories of special elections that overestimated Democrats' eventual general election overperformance; under zero, that underestimated it; and bars at or near zero indicate special election categories that were highly reflective of eventual general election outcomes. Special election overperformance appears on average to significantly *overestimate* general election overperformance for Democrats in districts Republican presidential nominees won by more than 20 points (red bars), and *underestimate* Democrats in districts similarly won Democratic presidential nominees (blue). In all likelihood, this is at least partly due to the special election instantiation of the "retirement slump" phenomenon (Gelman and King 1990), in which an incumbent retiring (or leaving office via other means) creates the conditions for the next candidate in the incumbent's party to lose vote share compared to previous outcomes in that seat. In this instance, we may be seeing Democrats improving on prior outcomes because of the loss of the incumbency advantage on the Republican side in red districts; and vice versa in blue districts.

Meanwhile, errors are consistently lowest in competitive districts (green bars) during midterm election years. 2024 is again a notable exception, in that Democrats' fortunes were significantly overestimated across all three types of districts.

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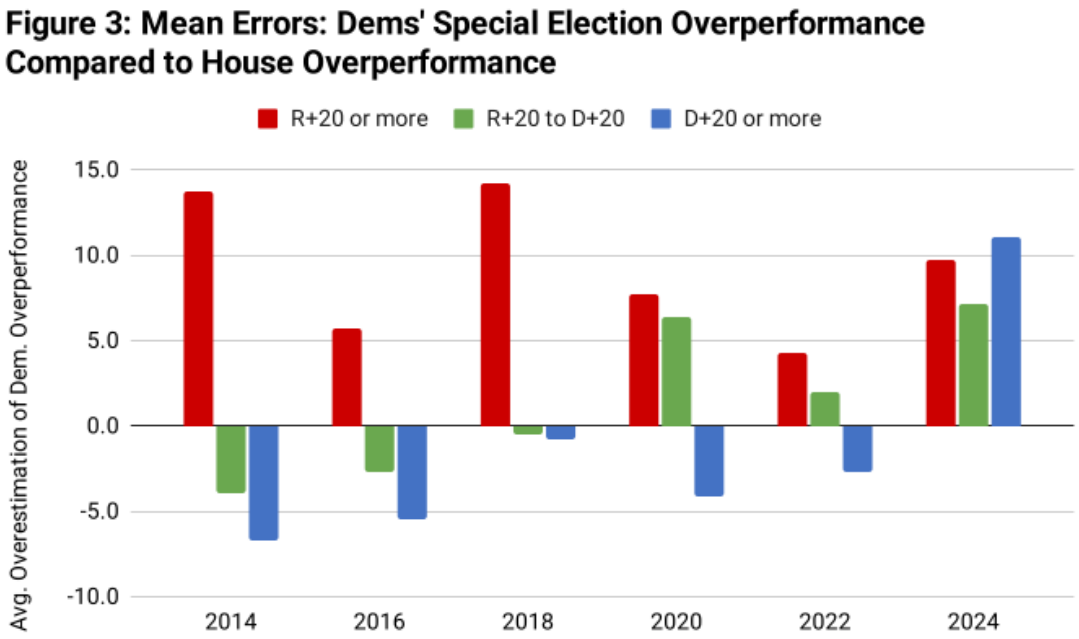


Figure 3: By-cycle averages of the subtracted difference between Democrats' overperformance in the eventual U.S. House popular vote in the November election minus their overperformance in special elections, subset by district presidential partisan lean.

Sources: CQ Voting and Elections Collection/The Downballot

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What Does This Mean for 2026?

So far, we have learned that partisan overperformances in special elections most closely match the outcomes of eventual general elections to the U.S. House during 1) midterm election years, when turnout is comparatively higher among more engaged voters of the sort who participate in special elections; and, 2) in districts that are relatively balanced from a partisan perspective. Notably, essentially all 2026 U.S. House districts that are most likely to be decisive in terms of majority control of the chamber fall within this twenty-point presidential margin. So what can the 2026 cycle's special elections tell us thus far?

Figure 4 further summarizes the modern state of play for competitive special elections in midterm years, and the startling possible implications for 2026. In these "swing districts" in the 2014, 2018, and 2022 midterm cycles, the extent of Democratic over- or underperformance is nearly identical between specials that occur during each cycle, and the eventual House popular vote in that subset of swing districts during the same cycle.

Figure 4: Democratic Overperformance in Special Elections and U.S. House Popular Vote in Midterms, 2014-2026 (Swing Districts Only)

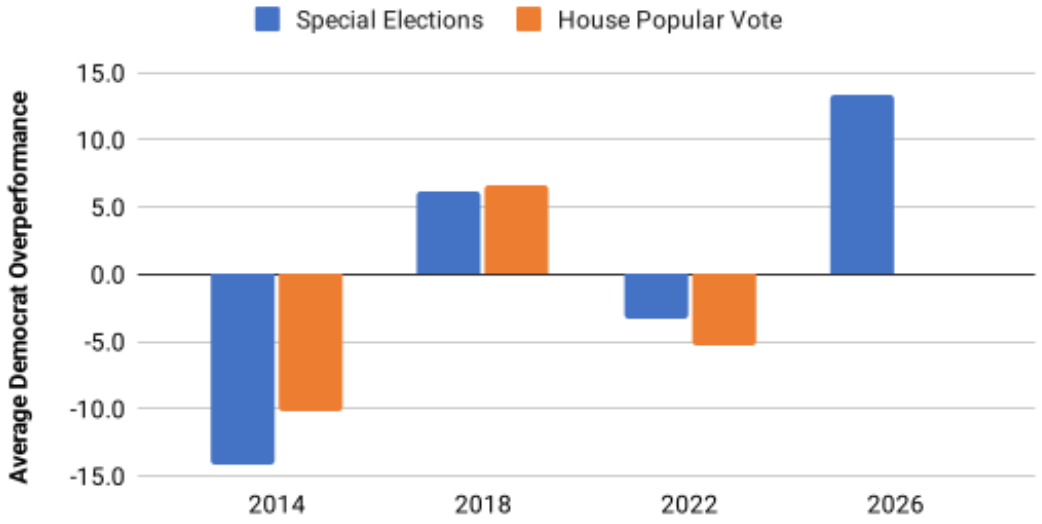


Figure 4: By-cycle averages of Democratic overperformance of presidential results in special elections (blue) compared to overperformance in the eventual U.S. House popular vote in the November election; limited to midterm elections in swing (R+20 to D+20) districts.

Sources: CQ Voting and Elections Collection/The Downballot

These similarities are particularly striking when considered in the context of the 2026 election cycle's average special election overperformance for Democrats in swing districts. At 14 percentage points, it is more than twice the size of overperformance that Democrats saw in the

2018 cycle, which culminated in a widely acknowledged “blue wave” that netted Democrats a 36-seat advantage in the House.

Moreover, unlike in previous cycles, Democrats in 2025-2026 are overperforming their 2024 presidential district margins across virtually all types of districts, including those subset by racial and ethnic groups, as well as levels of college education. Figure 4 compares 2026 overperformances in these subgroupings (alongside the aforementioned district partisan subgroups) to the 2018 special elections. As an expected Democratic “wave” year following the first two years of a Donald Trump presidential term and legislative trifecta, this may be the clearest pairwise descriptive comparison within this decade-plus of special election data. Generally, the overperformance in 2026 is far more evenly distributed, and in the double digits, across all district types. The biggest overperformances in 2018 specials, and the only groups which outstrip 2026, are in heavily Republican districts, and districts with very few Hispanic voters.

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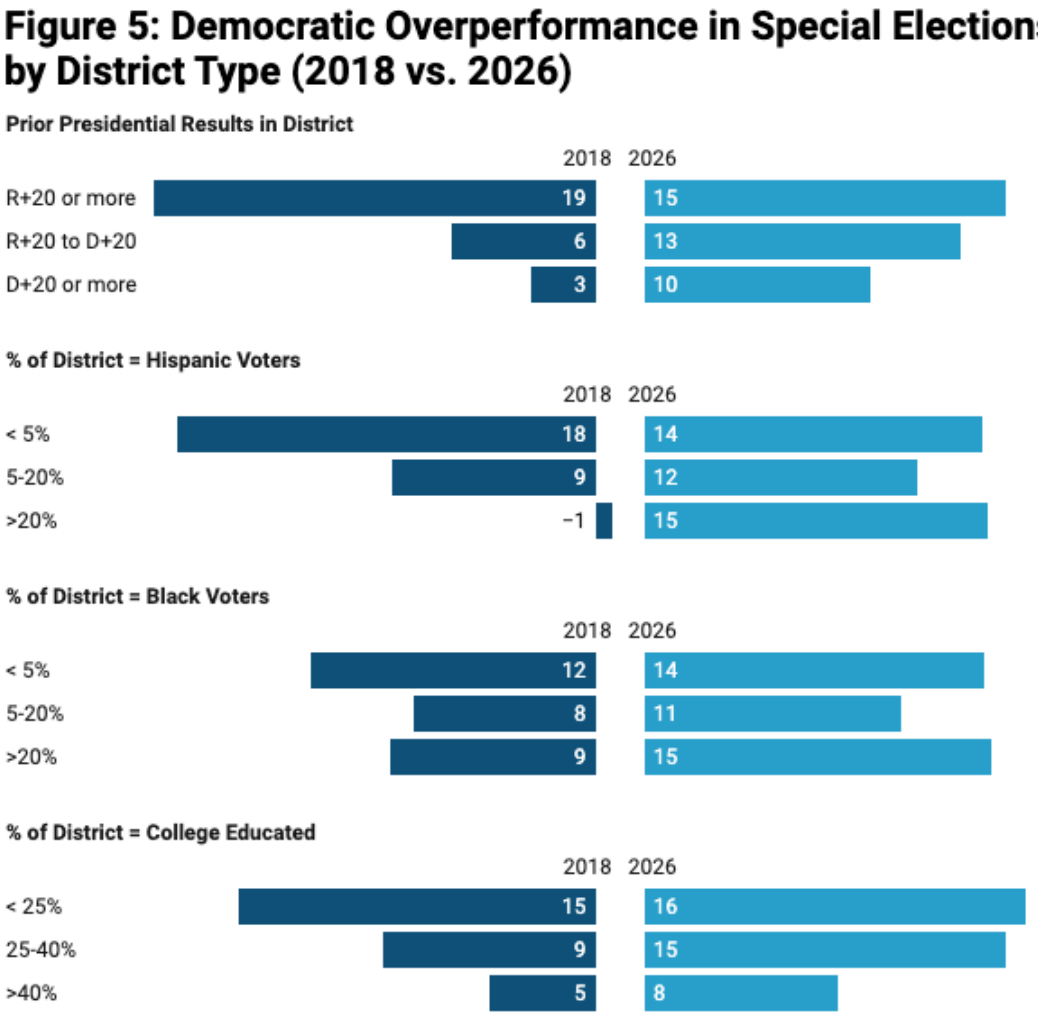


Figure 5: Democratic overperformances in special election in 2018 versus 2026, subset by consistent district types.

Sources: CQ Voting and Elections Collection/American Community Survey estimates/The Downballot

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Despite these robust and unprecedented special election gains in 2026, several crucial caveats should limit the definitiveness of any conclusions about what is likely to happen in November's general congressional elections. For one thing, the U.S. Senate map remains a difficult one for Democrats. Even if they continue to enjoy a 2018-like election environment with an unpopular president, many Senate contests in this particular cycle are taking place in

solidly red states. The House, by running elections in all 435 districts each two-year cycle, often with the same or similar candidates as appear in special elections, is a much cleaner slate of comparison. But even here, we should be wary of definitive predictions.

First, as useful as district-level comparisons to presidential votes clearly are in ensuring cross-sectional reliability, these estimates are necessarily dependent not just on the *current* partisan environment, but the environment that was present in the most recent presidential election from which these "overperformance" measures are derived. For example, Figure 4 above compares overperformance in 2026 specials (using 2024 presidentials as a baseline) to that of 2018 specials (using 2016 presidentials as a baseline). The 2024 presidential election was by no means a wipeout for Democrats, but it was a much more evenly-distributed embrace of Donald Trump than was 2016, particularly in geographic areas that are traditionally more Democratic-leaning, and with more Hispanic voters. Trump also won the popular vote in 2024, a feat he did not accomplish in 2016. The resulting baseline comparison points for each cycle's "overperformance" measures are therefore decidedly not beginning from the same place. As a result, the figures above should definitively *not* be read as necessarily projecting bigger Democratic wins (much less wins more than twice as large) across the board compared to 2018.

Second, although both special and general election overperformance as derived from district presidential outcomes are reliable measures in many ways, they still have relatively normal distributions. Despite the positive average overperformance, a number of Democrats still *underperformed* in specials in Democrat-friendly 2018 and 2026; likewise, a number *overperformed* in the comparatively poor Democratic midterms of 2014 and 2022. Averaging these outcomes across all special elections, especially when including state legislative outcomes,

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is the most sensible way to estimate general trends as I have done in this study[7]; however, forecasting the 2026 U.S. House elections by way of applying the Democrats' current 15-point overperformance to all U.S. House districts would not produce an accurate November forecast, and would fail to take into account the candidate, district, and time-sensitive factors that do continue to matter in individual elections.

In recognition of these limitations, the methodological strategy of this paper omits explicit projection or prediction of seat gains or vote shares for specific U.S. House districts based on special election outcomes in other districts. Scholars and analysts should likely avoid using special elections *by themselves* to project general election results. As argued earlier, special elections are reflections of the same kinds of underlying forces — presidential approval, consumer confidence, public partisan sentiment — that are really driving voters' choices.

Even so, as an electoral reflection of these forces, specials can give us an early window into whether and how these forces are playing out. I have argued here that specials are not usually appropriate to include as independent variables in models that also invoke other collinear measures like the generic ballot question and presidential approval ratings. Instead, special elections are probably best thought of as a complementary set of data points for prognosticators and analysts, as a kind of "early warning system" for major partisan shifts. This is particularly true, it appears, in "thermostatic" midterm election years like 2026.

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[7] Similar approaches are commonly taken when leveraging averages of public opinion polls of individual races, or of the generic ballot question.

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