Forecasting the US Midterm Congressional Elections Without Poll Data

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This article develops a long-term forecasting model for the US midterm elections which does not require polling data. It uses Congressional House and Senate seats captured by the Democrats in every presidential and midterm election since the end of the Civil War to develop the model. A general to specific econometric modelling strategy is utilised to derive the best Data Generating Process for the forecast. In addition, it uses a split sample estimation strategy to detect structural changes in Congressional voting over time. The results suggest that economic voting has been a feature of Congressional elections since the Civil War and it can be effectively modelled without poll data. The model predicts that the Democrats will win control of the House with 237 seats but not the Senate with 47 seats in the Mid-Term elections.

Keywords: Forecasting Mid-Term Elections; General to Specific Modelling; Time Series Analysis

The literature on election forecasting has grown enormously since its inception more than half a century ago (Lewis-Beck, 2005). It is now an important branch of a larger literature on forecasting in the social sciences which traditionally has been dominated by economics (Timmerman and Elliot, 2016). That said, the rise of forecasting sites such as Kalshi and Polymarket predicting political events such as elections is now a commercial exercise as well as an academic one (Tetlock and Gardner, 2019).

One the most influential early contributors to the electoral forecasting literature in the United States was Gerald Kramer (1971). His theoretical argument

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/S1049096526103060

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was simple; he assumed that voters looked to the economic performance of the incumbent President's party to decide how to vote in midterm and presidential elections. If they found this to be satisfactory, they would support the incumbent and if they found it to be lacking, they would support the opposition.

The great majority of subsequent papers on economic voting in the United States and in other democracies have incorporated poll data into the analysis (Lewis-Beck et al. 2025). Interestingly, Kramer did not use polls but rather adopted a common strategy among economists of inferring economic expectations with assumptions rather than data. He assumed that the voters would expect growth to increase by a given percentage each year and when these expectations were met, they would vote for the incumbent. However, if expected growth fell below the threshold they would vote for the opposition party. A subsequent and related paper by economist Ray Fair (1978) used the same approach as did political scientists Edward Tufte (1975) and Paul Whiteley (1986) in different forecasting models.

The aim of this paper is to forecast the outcomes of the midterm congressional elections without using poll data. We begin by examining the advantages of forecasting without polls before discussing the theoretical underpinning of the long-term forecasting model estimated in the paper. This is followed by a section which presents the results of the model based on 159 years of presidential and midterm elections in the United States. We start in the aftermath of the Civil War since that conflict produced the dominant Republican – Democrat party system in the United States (Reichley, 1992). This makes it an ideal starting point for a long-run time series analysis. Finally, we investigate if polling data helps to improve the forecasting model in the post-war period.

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Why Omit Polling Data?

There are several reasons why it is advantageous to omit poll data and instead focus on the effects of the economy on voting in a forecasting model. To start with electoral data avoids the problems of untangling the difference between voting intentions or reported voting from surveys and actual votes in elections. If the modelling focuses on the latter, it avoids the increasing problems which are emerging in contemporary polling (Jackson, Lewis-Beck, Tien, 2020).

Michael Bailey has drawn attention to these problems focusing particularly on sampling. He points out that: *'Polling fulfils a valuable function in society but has become increasingly difficult in recent years. Modern survey samples are non-random samples'* (Bailey, 2024, p.21). The main problem he identifies is 'nonignorable nonresponse', that is, samples which are biased due to falling response rates which traditional methods of weighting cannot correct[1]. Modelling which does not rely on polls but focuses on actual votes avoids this problem.

A second advantage relates to the limited availability of poll data prior to the Second World War. This has significant implications for time series analysis. To illustrate this point, Michael Lewis-Beck and his colleagues have been forecasting elections in the US since the 1980s. Their political economy model has been largely successful over this long period, and in the 2024 contest it predicted that the Democrats would win 48 percent of the vote using data from 1948 (Tien and Lewis-Beck 2025, p.249). However, in the conclusion they pointed out that *'As of this moment (late August), our political economy model forecasts a nip-and-tuck*

[1] This is particularly a problem for telephone polls (see Keeter, Hatley, Kennedy, and Lau, 2017)

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presidential race, with either party almost equally likely to lose' (Tien and Lewis-Beck 2025, p.252).

If a lack of polling data were not a restriction on this type of modelling, the extra statistical power available from a longer-run time series could have helped to identify the winner. A focus on votes in actual elections rather than polls, creates this possibility in an era in which winning margins are shrinking, making poll-based forecasting even more difficult (Tricaud and Wacziarg, 2025).

A third reason for seeking an alternative to poll data was advocated by Wouter Van Der Brug and his colleagues in their study of economic voting in fifteen democracies (Van Der Brug, et al. 2007). They criticised subjective evaluations of economic conditions based on polling on the grounds that they are contaminated by other variables, principally partisanship. They write: *'(accountability) requires actual economic conditions to be the benchmark for electoral punishment and reward'* (Van Der Brug et al. 2007, p23). Their point is that official economic data such as inflation and growth are not affected by these biases.

To be fair there are advantages in including polling data which is why they are extensively used in modelling. This is particularly important when election behaviour across the democratic world is becoming more volatile. The advantages of surveys and the relatively new analytical techniques accompanying them are well known (Gelman and Vehtari, 2021). But it is interesting to know if we can leave polls out of forecasting models without losing accuracy.

The Political Economy Model

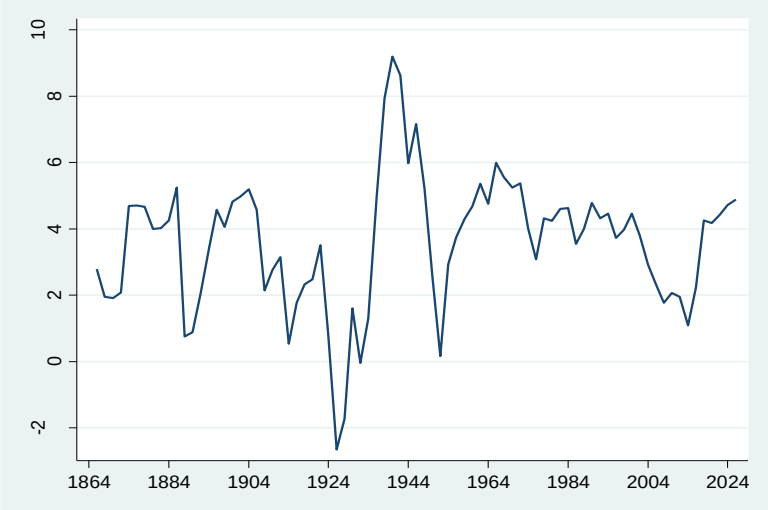
In this section we examine the theoretical ideas which underpin the political economy forecasting model to be estimated. The starting point is the observation that all forecasting models use contemporary and past data to identify future trends.

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Though obvious, this carries with it an important implication, namely that accurate forecasting is possible only when there is a good deal of inertia in a system (Lewis-Beck and Quinlan, 2024). If the relationship between the past and the future is weak or non-existent then forecasting will not be possible.

This means that identifying inertia in successive elections is an important key to accurate forecasting. In the modelling we use the number of seats won in consecutive presidential and mid-term elections by the Democrats in the House and Senate since the end of the Civil War. The time series runs from the 39th Congress of 1865 to 1867 up to the 119th Congress of 2025 to 2027.

Figure 1 US Economic Growth per capita in Real Terms 1866 to 2025



Source: Maddison Database

The most important theoretical issue in the modelling is to capture the impact of the economy on elections over this long period of time. This is done using the Maddison economic growth data (Maddison, 1979; Bolt and Van Zanden 2014). Angus Maddison pioneered research into long-term economic growth across many countries. His data for the US measures per capita growth in real terms from 1720[2].

[2] See: https://www.rug.nl/ggdc/historicaldevelopment/maddison/?lang=en)

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This makes it an ideal source for modelling the performance of the US economy in the long run.

The growth series appears in Figure 1, and it makes a very parsimonious model possible because it has the advantage of controlling for both inflation and unemployment[3]. The control for inflation is provided by measuring growth in 2011 prices, and for unemployment via Okun's law[4]. The latter is a long-standing inverse relationship between economic growth and unemployment (Okun, 1962). Using this data has the additional advantage of capturing the relationship between the economy and elections in periods when there were few reliable official statistics.

The importance of inertia can be illustrated with an ARIMA model of Democrat seats held in the House over this period[5]. The univariate model is:

$$D_t = \alpha + \beta(D_{t-1}) + \varepsilon_t$$

Where:

D_t = Democrat seats following the current election (t)

D_{t-1} = Democrat seats following the previous election (t-1).

α, β are parameter estimates, and ε is an error term

The β coefficient measures the inertia in the system and from 1866 to 2024 its value is 0.79. Previous elections have a very strong impact on current elections despite the two-year gap between them.

Figure 1 shows some large fluctuations in growth rates in the US over this period. The impact of the Wall Street crash of 1929 and the subsequent Great Depression is very apparent. It also shows that the New Deal and the Second World

[3] Note that the series has been smoothed to clarify trends.

[4] Okun's law can be written as $\Delta u = k - c(\Delta Y)$ where Δu is the percentage change in the unemployment rate; ΔY is the percentage change in GDP in real terms; k is the rate of growth required to keep unemployment constant; and c is the coefficient measuring how much unemployment responds to changes in GDP.

[5] See Box and Jenkins, 1976

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War led the recovery of the US economy from the Great Depression. In addition, there is evidence of the effects of the financial crash of 2007-2008 and subsequent recession as well as the Covid pandemic of 2020. When using these data, we are searching for possible 'regime changes' which fundamentally shift the relationship between the economy and voting. There are many examples of recessions and recoveries in the data, but the present focus is on changes which permanently alter relationships. These need to be controlled to get a clear picture (Hendry and Ericsson, 2001).

Another issue relates to the influence of presidential incumbency on the elections. As is well known midterm elections tend to favour the party which does not control the White House, so the economic variable is weighted to reflect this fact. The weighting follows Kramer's approach with growth weighted negatively for a Republican incumbent and positively for a Democrat. In other words, it is an interaction effect with a strong growth performance under a Republican President expected to reduce the number of House seats captured by the Democrats, whereas a similar performance under a Democrat President increases them.

The next section presents the results of modelling Democrat seats won in the House and in a subsequent section in the Senate over this long period. The models are then used to forecast the results of the midterm congressional elections in 2026.

Modelling Congressional Elections – The House

The analysis involves identifying the best Data Generating Process for forecasting these elections. This strategy uses successive specifications and a full range of diagnostics to test the models. This approach is often described as the General-to-Specific modelling strategy pioneered by econometrician David Hendry (Hendry, 1995). It involves starting with a very general specification and then

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reducing it using various tests to find the most parsimonious version. Table 1 contains the model for the entire period alongside split sample versions running from 1866 to 1946 and from 1946 to 2024.

The entire period saw the transformation of the US into a world power and the Federal government became a much greater influence on the lives of the average Americans. It is likely that these economic, political and social changes affected the relationship between the economy and voting. The split sample models investigate this possibility. Essentially, we are looking for regime changes which may be slow to take place, but which can be influential over time. The table reports standardised coefficients and t statistics.

Table 1 Democrat House Seats Models 1866 to 2024 and Split Samples

Predictors	**1866 to 2024 Model (N = 81)**	**1866 to 1946 Model (N=41)**	**1946 to 2026 Model (N=40)**
Democrat Seats Lagged Once	0.57(5.6)***	0.71(4.8)***	0.36(3.1)***
Democrat Seats Lagged Twice	0.28(2.4)***	____	____
Weighted Growth per Capita	0.24(2.9)***	0.31(2.9)***	0.41(2.9)***
Republican President	0.40(4.8)***	0.36(3.0)***	0.65(4.6)***
Great Depression Crash (1932)	0.13(1.8)*	____	___
Time Trend	0.07 (0.4)	0.18 (1.3)	-0.36 (3.0)***
R-Squared	**0.71**	**0.70**	**0.60**
Root Mean Square Error	**29.1**	**35.5**	**20.4**
Durbin Chi-Squared Autocorrelation Test	**0.01 (p = 0.91)**	**1.30 (p = 0.26)**	**0.13 (p = 0.61)**
Autoregressive Conditional Heteroscedasticity Test	**1.24 (p = 0.27)**	**2.70 (p = 0.10)**	**0.26 (p = 0.49)**
Ramsey RESET Test	**0.09 (F = 0.96)**	**0.77 (F = 0.52)**	**0.02 (F = 0.99)**
Mean Variance Inflation Test	**1.97**	**1.95**	**1.51**
Democrat Seat Forecast	**237 (+/- 16.2)**	**------**	**224 (+/- 14.4)**

Standardized coefficients with t statistics in parentheses. *** = p<0.01; ** p<0.05; * p<0.10

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Table 1 shows that the most important variable for explaining the number of Democrat House seats won in the full model is inertia. This is measured by House seats captured in the previous election and in the election before that. Not surprisingly the strongest effect relates to the former, but the latter is also important. Together these variables show the significance of the past in explaining current electoral performance.

The growth variable in the model shows that economic performance has a strong positive impact on the number of Democrat House seats won in elections. If we compare the split sample models it is apparent that the effects of growth on voting have strengthened over time, since the coefficient in the post-war model (0.41) is significantly stronger than in the pre-war model (0.31). That said, the most important lesson to be learned from the full model in Table 1 is that economic voting has been a significant feature of American politics since the Civil War.

A third variable relates to Republican incumbency of the White House. Not surprisingly this helps the Democrats to win seats, a regular feature of midterm and presidential elections for many years. The comparison between the actual and forecast Democrat seats in the House appears in Figure 2. The estimates show that the Great Depression of the 1930s following the Wall Street crash of 1929 had a significant impact on Democrat House seats won. It represented the start of the New Deal era which was clearly a regime change in both growth and in the electoral performance of the Democratic party.

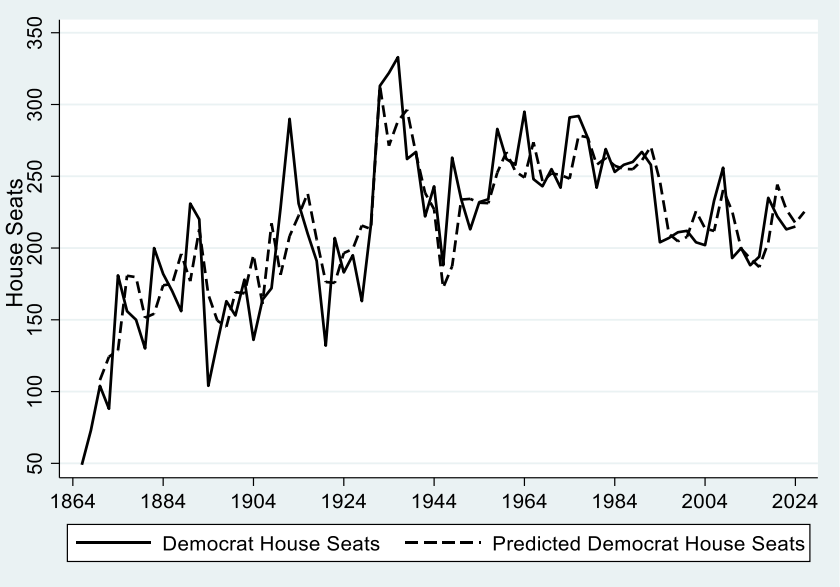
However, the same cannot be said about the impact of the Second World War, the Great Recession of 2008-2010 and the Covid Pandemic. These were all very important shocks to both the economy and society, but they did not bring about a regime change in the relationship between the economy and elections. The war

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economy produced very rapid growth and full employment, but it was part of a regime which had already been established by President Roosevelt following his victory in the 1932 election. That turning point changed both the state of the economy and the political system.

Similarly, while the financial crisis of 2008-2010 was a significant shock to US and global financial markets, it did not fundamentally change the political and economic regime in the US. It produced significant new regulations of banks and other financial institutions, but not to the extent of a regime change. A similar point can be made about the Covid pandemic which had a dramatic but temporary impact on the US economy.

Figure 2 Actual and Predicted Democrat House Seats 1866-2026



Source: American Presidency Project

Figure 2 shows that Republican dominance was significant in the nineteenth century in House elections. It was not until the twentieth century, particularly in the New Deal period, that the Democrats started to win control of the House with large margins. As Alan Abramowitz (2019) points out, Democrat dominance in Congressional elections continued well into the post-war period at a time when the

party's support in presidential elections was eroding. This type of inertia had a big impact on Democrat success in House elections.

The General-to-Specific modelling strategy places great emphasis on diagnostic testing as a guide to specification and to ensuring that the models are well behaved. To that end the modelling includes tests for residual autocorrelation, autoregressive conditional heteroscedasticity, multicollinearity and model specification in the form of the Ramsey RESET test (Kennedy, 2008). In addition, a time trend variable which is a simple counter is included as a control for any long-term trends which may affect the modelling.

The models pass all these tests since the statistics are not significant, except for the time trend variable in the post-war model. In that case the negative coefficient shows that a trend decline in support for the Democrats in House elections has been a feature of these elections since the Second World War[6].. This is a significant handicap for the Democrats, and it affects the seats forecasts in comparison with the full model.

The seat forecasts for the 2026 midterms appear in the final row of Table 1, together with 95% confidence intervals. The forecast for the entire period is that the Democrats will win 237 seats with a 95% confidence interval of plus or minus 16.2 seats. This means there is a small probability that the party will not win a majority of 218 in the House, but the probability of winning majority control is much greater.

The second forecast in Table 1 relates to the post-war period which predicts that the party will win 224 seats, subject to 95% confidence interval of 14.4 seats. The full model has greater statistical power than the post-war model and on those

[6] A standard deviation increase in the trend variable reduces the standard deviation of the Democrat House seats by just over a third

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grounds is likely to be more accurate. However, there are clear differences between the full and post-war models. As mentioned earlier, they take the form of reduced inertia, a greater importance of the economy and a greater impact of a Republican president in the post-war version.

As far as the midterm elections in 2026 are concerned President Trump has the lowest approval ratings for any president since the Second World War, and very poor ratings for his management of the economy both of which point to a strong Democrat performance in these elections[7]. These variables should give significant advantages to the Democrats, even though their support continues to be eroded by the long-term trends.

To make the forecast we need growth data for the year 2026 while the other variables in the equation are already known. There is no estimate of real growth per capita available in the Maddison data, so we interpolate this from the relationship between that dataset and the Federal Reserve real growth per capita series available up to June 2026[8]. This is used in the modelling to create the weighted growth series.

Turning to the potential shocks to economic growth, the Great Depression regime shift variable is important in the full model, but not in the pre-war split sample model. Once again, the greater statistical power of the former identifies an effect not apparent in the split sample version. As regards post-war shocks such as the financial crash of 2007-8 or the Covid pandemic none of them were significant in the models confirming that these did not bring about a regime change.

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[7] https://news.gallup.com/poll/116677/presidential-approval-ratings-gallup-historical-statistics-trends.aspx

[8] See https://fred.stlouisfed.org/series/GDPC1CTM The long-term correlation between the Maddison and Fed Data is 0.99.

The Republican presidential impact before the Second World War was 0.36 and this increased to 0.65 after the war. This is consistent with the growing nationalisation of American politics highlighted by Daniel Hopkins (2018) who shows that voters increasingly focus on national politics and the Federal government as they grew in importance during the post New Deal period. The result is that presidential politics acquired a bigger influence on Congressional elections (see also Iyengar et al. 2019).

In addition, a closer analysis shows that House voting was heavily influenced by the Watergate scandal which led to Richard Nixon's resignation as President in 1974. The House elections in that year gave the Democrats 147 seat majority over the Republicans, and the effect continued up to the midterms in 1976 when they won 149 more seats than the GOP. It was a period which helped the Democrats to win seats because of a national political scandal.

Modelling Congressional Elections – The Senate

Table 2 contains the three models of Democrat Senate seats won over this period. Given that a third of the Senate retires in each election we would expect the model to have greater inertia than the House model. This is confirmed in the table since the coefficient for the lagged seats predictor is 0.95, although there is no second lagged effect. As a result, the goodness of fit of the full model is 0.85, a very high percentage of variance explained.

The Senate model is simpler than the House model, but it essentially tells the same story. Economic voting is important throughout the entire period, but in this case the effect is about twice as strong in the post-war sample than the pre-war sample. Similarly, a Republican incumbent in the White House had a very positive impact on Democrat representation in the Senate just as it did in the House. In this

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case the Republican Presidential variable was not significant in the pre-war version but highly significant in the post-war version.

Table 2 Democrat Senate Seat Models 1866 to 2024

Predictors	**1866 to 2024 Model (N=81)**	**1866 to 1946 Model (N=41)**	**1946 to 2024 Model (N=40)**
Democrat Seats Lagged Once	0.95 (14.9)***	0.89 (6.7)***	0.67 (5.7)***
Weighted Growth per Capita	0.16 (3.0)***	0.17 (2.4)***	0.32 (2.3)**
Republican President	0.18 (3.2)***	0.11 (1.2)	0.44 (3.3)***
World War Two	-0.09 (1.9)**	-0.14 (2.0)**	----
Time Trend	-0.01(0.1)	0.09(0.8)	-0.21(1.8)*
R-Squared	**0.85**	**0.87**	**0.63**
Root Mean Square Error	**5.0**	**5.4**	**4.5**
Durbin Chi-Squared Autocorrelation Test	**0.57 (p =0.45)**	**1.82 (p=0.18)**	**0.29 (p =0.59)**
Autoregressive Conditional Heteroscedasticity Test	**0.91 (p =0.37)**	**0.11 (p=0.74)**	**0.21 (p =0.65)**
Ramsey RESET Test	**0.28 (F= 0.84)**	**0.20 (F=0.90)**	**3.81(F=0.02)****
Mean Variance Inflation Test	**1.49**	**2.63**	**1.52**
Democrat Seat Forecast	**47 (+/- 2.8)**	**------**	**47 (+/- 3.20)**

Standardized coefficients with t statistics in parentheses. *** = p<0.01; ** p<0.05; * p<0.10

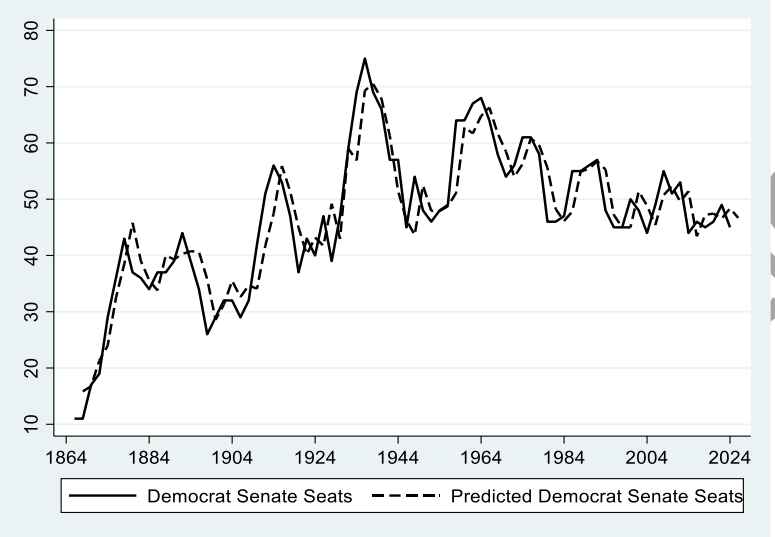
The forecast from the full model is for the Democrats to win 47 Senate seats with a 95% confidence interval of plus or minus 2.8 seats. If so, they will gain two seats in the contest and with the assistance of two independent senators they should control 49 seats overall. In this forecast there is a significant chance that they will win control of the Senate, but it is more likely that the Republicans will retain control.

The forecast for the post-war model is the same but with a wider confidence interval. The Democrats could win control of the Senate, but it is more likely that it will remain in Republican hands. Figure 3 shows trends in the number of Senate

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seats won by the Democrats since the 39th Congress, together with the forecast from the model. Not surprisingly, it is very similar to Figure 1 trending upwards over time. The diagnostic tests show that the models are well behaved.

Figure 3 Actual and Predicted Democrat Senate Seats 1866-2024



Does Polling Make a Difference?

Presidential approval data is available back to the 1940s and it has been used by many researchers in the past (Peters, 2025, Lewis-Beck and Dassonneville 2015). It can be incorporated into the post-war models to test what difference it makes to the forecasts. To do this we add Republican presidential approval in June of the election year to the original specifications on the grounds that it has proved fairly accurate in forecasting elections in the past (Lewis-Beck et al. 2025).

This exercise shows that Republican presidential approval is not a statistically significant predictor of either House or Senate Democratic seats in Table 3. However, the mean variance inflation tests have increased significantly in both the House and Senate models, indicating that multicollinearity is more of a concern because of the presence of Republican presidential approval alongside the Republican presidential

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incumbency variable[9]. However, the variance inflation statistics are not large enough to really distort the results[10].

Table 3 Parsimonious Post-War House and Senate Models with Approval Data

Predictors	**Post-War House Model (N=40)**	**Post-War Senate Model (N=40)**
Democrat Seats Lagged Once	0.37 (3.1)***	0.64 (5.4)***
Weighted Growth per Capita	0.43 (3.1)***	0.34 (2.5)***
Republican President	0.99 (3.7)***	0.73 (2.8)***
Republican Presidential Approval in June	-0.36 (1.5)	-0.31 (1.3)
Time Trend	-0.34 (2.8)***	-0.20(1.7)
R-Squared	**0.63**	**0.64**
Root Mean Square Error	**20.1**	**4.5**
Durbin Chi-Squared Autocorrelation Test	**0.10 (p =0.75)**	**0.48 (p =0.49)**
Autoregressive Conditional Heteroscedasticity Test	**0.05 (p =0.82)**	**0.59 (p=0.44)**
Ramsey RESET Test	**0.60 (F= 0.62)**	**4.58 (F=0.01)*** **
Mean Variance Inflation Test	**3.26**	**3.30**
Democrat Seat Forecast	**229 (+/- 15.6)**	**48 (+/-3.5)**

Standardized coefficients with t statistics in parentheses. *** = p<0.01; ** p<0.05; * p<0.10

That said, Table 3 does not show that poll data is irrelevant for forecasting Congressional seats. This is true for two reasons. Firstly, there is a lagged interaction between growth and presidential incumbency which influences the inertia on the model. Secondly, if presidential approval date from closer to the election is used, for example in September, it becomes highly significant. However, it also inflates the VIF statistics to the point that multicollinearity becomes a serios problem. In other words,

[9] Note that Republican and Democrat presidential approval are highly collinear and so we cannot examine if there are any differences between them in the modelling

[10] A rule of thumb is that the VIF statistics should not exceed 10 before multicollinearity becomes a serious problem. See Kennedy, 2008, p.199

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the interaction between Republican Presidential incumbency and Republican Presidential approval grows ever stronger as the election approaches to the point that the variables cannot be independently estimated. Further work is needed to identify such effects[11].

In conclusion we can forecast elections without using polling data, allowing us to confirm that economic voting has been an important aspect of presidential and congressional elections since the Civil War. The full models for the entire period predict that the Democrats will very likely win control of the House but not control of the Senate in the midterm elections. We will know if this is accurate on Tuesday November 3rd 2026.

DATA AVAILABILITY STATEMENT
Research documentation and data that support the findings of this study are openly available at the Harvard Dataverse at https://doi.org/10.7910/DVN/9QU9XQ.

CONFLICTS OF INTEREST
The authors declare no ethical issues or conflicts of interest in this research.

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[11] Ridge and Lasso regression analyses could be used to explore this (see Hastie, Tibshirani and Friedman, 2009). However, this goes beyond the scope of this paper

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