POLITICS
Forecasting the 2026 US Midterm Elections

The Transmission Problem: A Nationalization-Weighted Forecast for the 2026 Midterm Elections

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Abstract:

Long-run structural models of U.S. House elections were developed for a political environment that no longer exists. The core predictors—presidential approval, the generic ballot, and economic performance—remain relevant, but the mechanism linking national conditions to district outcomes has changed as elections have nationalized. Using U.S. House elections data from 1976-2024, we show that the coefficient on district presidential baseline nearly tripled across this transition, while the effects of spending and challenger quality sharply declined. We develop a nationalization-weighted forecasting model in which coefficients vary with a cycle-level nationalization index and show that it outperforms a standard fixed-coefficient model out of sample. Applied to the 2026 House, it projects a mean of 205 Republican seats, an 80% interval of [185, 224], and an 80% probability of a Democratic majority. A parallel Senate model yields the same conclusion: nationalization increases, rather than reduces, forecast uncertainty and should widen prediction intervals.

1. Introduction

The editors of this special issue raise a concern that should resonate with forecasters of U.S. elections. Long-run structural models of congressional elections—the kind that rely on presidential approval, economic conditions, and the midterm referendum effect—are being asked to do their work in an environment that looks little like the one in which their coefficients were estimated. A second Trump administration has reorganized the executive branch and federal-state relations on a scale not seen since the New Deal; mid-decade redistricting has redrawn the district-level baselines on which forecasters rely; episodes of political violence have raised questions about the basic stability of the electoral process; and macroeconomic conditions—tariff-driven inflation and

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/S1049096526102789

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the fallout of the war with Iran—have departed sharply from standard political-economy trajectories. If one believes that the inputs to forecasting have become unpredictable, the temptation is to conclude that forecasting itself has become unreliable.

We resist that conclusion. The case we make in this paper is that the variables long-term forecasters have relied upon—presidential approval, the generic ballot, economic performance, and district-level partisan baselines—remain the right variables. What has changed is not the inputs but the transmission mechanism by which those inputs produce district-level outcomes. Over the past quarter century, US elections have nationalized (Carson, Sievert, and Williamson 2024; Hopkins 2018; Jacobson 2015; Sievert and McKee 2019). District-level swings now track national swings more tightly, split-ticket voting has collapsed (Carson and Jacobson 2024), candidate-specific factors absorb a diminishing share of the variance in district outcomes, and partisan preferences have calcified in the face of substantial political shocks (Sides, Tausanovitch, and Vavreck 2022). The consequence for forecasting is not that national indicators have lost their predictive value—if anything, they matter more—but that the mapping from national indicators to district-level outcomes has shifted. Models that hold this mapping fixed across decades are misspecified not in their variables but in their coefficients.

This paper offers two contributions. First, we develop a nationalization-weighted forecasting model for the 2026 US House that allows the coefficients on both national and district-level features to vary with a measured index of electoral nationalization. Using U.S. House elections data, we document the transmission shift in stark terms: the coefficient on district presidential vote in a standard district-level specification has nearly tripled between 1978-1992 and 2010-2024, while the coefficients on spending, incumbency, and challenger quality have all compressed. A cycle-by-cycle model whose coefficients vary with our nationalization index outperforms a pooled

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fixed-coefficient benchmark on out-of-sample forecasts. Applied to 2026, the nationalization-weighted model projects a mean of 205 Republican seats, with a median of 205, an 80% prediction interval of [185, 224], and an 80% probability that Democrats take majority control of the chamber.

Second, we argue that nationalization is not only an argument about where to locate forecasting signal; it is also an argument about uncertainty. A small miss on the national Democratic vote share now translates into a substantially larger miss on House seats than it would have three decades ago, because the same national error gets amplified through correlated district movements. Our Monte Carlo decomposition bears this out: national-indicator uncertainty dominates, and the resulting 95% prediction interval is 59 seats wide against only 21 for the fixed-coefficient benchmark. Properly accounting for nationalization implies wider, not narrower, prediction intervals—the opposite of what headline forecasts tend to communicate.

The article proceeds as follows. Section 2 develops three forecasting implications of nationalization. Section 3 describes our data and the construction of a nationalization index. Section 4 presents the model and its backtests. Section 5 applies the model to the 2026 U.S. House. Section 6 extends the parallel specification to the 2026 U.S. Senate. Section 7 discusses how forecasters should communicate uncertainty when the structure being forecast is itself a moving target.

2. Nationalization as a Forecasting Challenge

The observation that U.S. elections have nationalized is by now unremarkable. Hopkins (2018) documents a long-run decline in the distinctiveness of state and local political behavior, as voters increasingly evaluate candidates through the lens of national party brands. Jacobson (2013, 2015) shows that the correlation between district-level presidential and congressional vote shares has reached historic highs, and that voters who split their tickets—once a meaningful share of the

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electorate—have become vanishingly rare. Sievert and McKee (2019) extend this evidence to U.S. Senate and gubernatorial elections; Abramowitz and Webster (2016) identify negative partisanship as a central mechanism. Sides, Tausanovitch, and Vavreck (2022) describe the contemporary electorate as "calcified," with stable partisan preferences that even large political shocks fail to dislodge.

For students of congressional elections, the implication is that district-level outcomes are increasingly predictable from national conditions and stable partisan lean and decreasingly explained by the local features—candidate quality, incumbency tenure, constituent service—that once mattered considerably (Carson and Jacobson 2024; Mayhew 1974). District swings have become more uniform than they were a generation ago (Jacobson 2013), and the incumbency advantage has compressed substantially over the same period (Carson and Jacobson 2024; Fiorina 2017). Some district-based forecasters glimpsed these shifts early, flagging the decline of the incumbency advantage already in 2014 and 2018 (Jacobson 2015).

For the forecasting literature, by contrast, these implications have been slower to register. The canonical long-run forecasting models—Abramowitz's (2008) Time-for-Change model, Lewis-Beck and Tien's (2016) political-economic specification, the Bafumi, Erikson, and Wlezien (2010a) generic ballot model, and Campbell's (1996) trial-heat approach—were developed when the structural relationships they describe looked substantially different from what they look today. Tufte's (1975) canonical referendum model estimated that a one-point decline in presidential approval cost the president's party a fraction of a House seat per point; more recent estimates imply an effect several times larger (Carson and Jacobson 2024). Closest to our own approach is the two-stage forecasting model of Bafumi, Erikson, and Wlezien (2010b), which predicts the national vote and then maps it onto district results and a simulated seat distribution; in recent cycles they, and

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practitioner forecasters documenting nationalization (Morris 2022), have reported the shrinking weight of district-level variables. Our contribution is to make that second-stage mapping the explicit object of study—letting each district coefficient vary with a single measured index of nationalization—and to trace its consequences for the width of the seat forecast.

We emphasize three specific forecasting consequences of nationalization. First, the weights on national indicators relative to district-level features should be allowed to vary over time. Models that pool four decades of midterm observations and estimate a single coefficient on, for example, candidate fundraising or incumbency are estimating a coefficient that mixes two regimes: a high-local-variance regime that prevailed from the 1970s through the 1990s, and a high-national-variance regime that has prevailed since. Forecasts for 2026 built from a pooled model therefore overstate what we can learn about district outcomes from district-level features and understate what we can learn from national indicators.

Second, the functional form linking the generic ballot or presidential approval to seat outcomes has steepened. When district swings are highly correlated, a given national vote shift produces a larger seat shift than the same national shift would have produced under earlier seat-vote relationships (Jacobson 2013). Forecasting models that assume a stable swing ratio underestimate the responsiveness of the contemporary House to national conditions. This steepening links our approach to the uniform-national-swing tradition long used to project seats in other single-member-district democracies such as the United Kingdom, Canada, Australia, and New Zealand (Butler and Stokes 1969); the nationalization-weighted model is in effect an American adaptation in which the degree of swing uniformity is itself estimated rather than assumed.

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Third, nationalization has direct implications for forecast uncertainty. In a less nationalized system, an error on national indicators does not translate cleanly into a seat-level error, because district-level idiosyncratic variation absorbs part of the miss. In a nationalized system, the same national miss propagates through correlated district outcomes into a much larger seat-level miss. A properly specified forecasting model should therefore exhibit prediction intervals that widen rather than narrow as nationalization increases—a pattern the published forecasting literature has largely failed to reflect. We treat the national House vote as an input to be forecast rather than an object our district model displaces: nationalization reshapes how a given national vote maps into seats rather than dampening national tides themselves (Grossmann and Wlezien 2024). This transmission claim concerns the second stage alone—the mapping from the national vote onto district and seat outcomes—and is deliberately agnostic about the first stage, the effect of national conditions such as approval and the economy on the national vote itself. Whether that first-stage effect is weakening or holding roughly constant over time, it is the steepened vote-to-seat mapping that converts a given national-vote error into a larger seat-level miss; our uncertainty result therefore does not hinge on the first stage.

3. Data and Approach

Our analysis draws on the panel of U.S. House elections, which covers all 435 districts from 1946 through 2024 (Carson and Jacobson 2024). For each district-year the panel records Democratic and Republican candidates, incumbency status, Democratic and Republican campaign expenditures, challenger and open-seat candidate quality, redistricting indicators, and—crucially for our purposes—the Democratic share of the major-party presidential vote in the district. We restrict the analytic sample to cycles from 1978 onward, the period in which district-level

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presidential vote and campaign expenditures are consistently coded, yielding 8,347 contested district-years across 24 cycles.

From the panel we construct two empirical quantities: a time-varying nationalization index, and a standard set of district-level forecasting covariates. The nationalization index follows Jacobson (2015) and combines two cycle-level moments. The first is the cross-district correlation between Democratic House share and Democratic presidential share; a higher correlation indicates tighter alignment between district partisan leanings at the top and bottom of the ticket. The second is the standard deviation of district-level swings around the national swing; a smaller deviation indicates more uniform district-level movement. Both moments are standardized and summed, and the composite index is min-max scaled to [0, 1] across the 1976-2024 window.

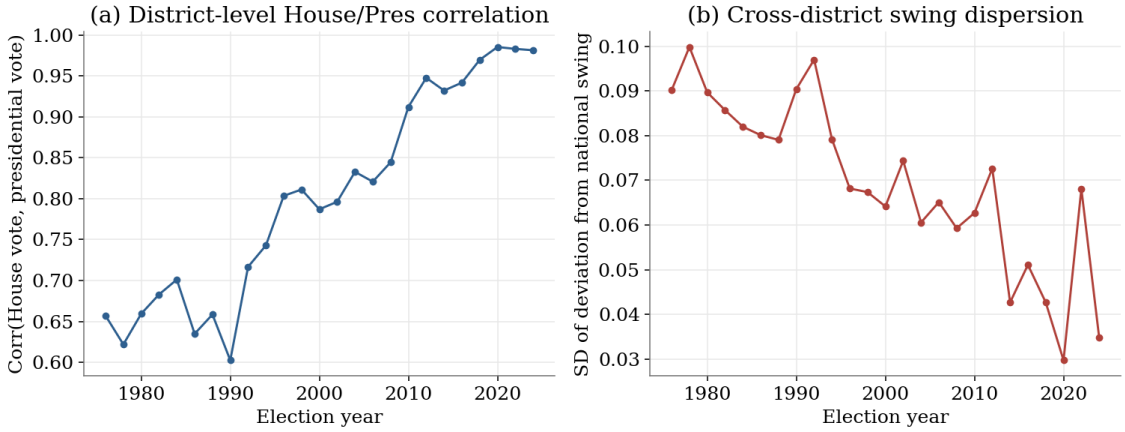
Figure 1, panels (a) and (b), shows that both components move decisively in the direction of nationalization. The district-level correlation between House and presidential vote rose from 0.62 in 1978 to 0.98 in 2024, with the sharpest increases occurring after 1990. The standard deviation of deviation from national swing declined from 0.090 in 1978 to 0.035 in 2024. The 2022 cycle represents a partial reversion—district swing dispersion rose to 0.068 in a cycle with unusually heterogeneous abortion-related movements—but the correlation component remained near 0.98, and the composite index for 2022 (0.69) still exceeded the value for any cycle before 2006.[i]

The forecasting covariates follow standard practice in the congressional-elections literature. District-level features include the presidential baseline, previous Democratic share, a set of incumbency indicators, challenger-quality indicators, the log ratio of Democratic to Republican campaign expenditures, and an indicator for whether the district was redrawn since the previous election (all fully defined in Appendix Table A1). National conditions in the training period are

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absorbed through year fixed effects; at the forecast stage they are replaced by explicit inputs drawn from polling and macroeconomic aggregators.

Figure 1: Nationalization of U.S. House Elections, 1976-2024



Note: (a) Cross-district correlation between Democratic House and presidential vote shares, rising from 0.62 in 1978 to 0.98 in 2024. (b) Standard deviation of district swings around the national swing, falling from 0.090 to 0.035.

For the 2026 forecast we draw district-level baselines from the 2024 cycle of the Carson-Jacobson elections panel. Where a 2024 district was uncontested, we impute Democratic vote by applying an eight-point partisan bonus to Democratic presidential vote. We mark as redistricted all districts in the nine states that enacted new congressional maps prior to July 2026 (California, Florida, Louisiana, Missouri, North Carolina, Ohio, Tennessee, Texas, and Utah; see National Conference of State Legislatures 2026)[ii]; the forecast inflates district-level residual variance by 60% in these states to reflect the added uncertainty over post-redistricting partisan baselines. National inputs are drawn from polling aggregates available as of early July 2026: Trump's job approval averages 39.4% in the RealClearPolling aggregate against 57.4% disapproval, the Silver Bulletin net-approval reading is -17, and the generic congressional ballot averages D+6 across major aggregators (Ballotpedia 2026; RealClearPolling 2026; Silver 2026).

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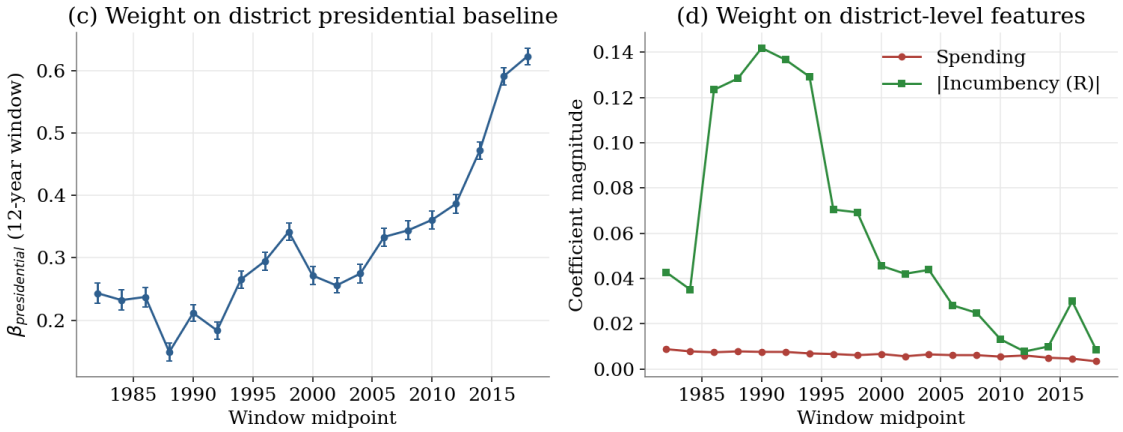
4. The Nationalization-Weighted Model

We estimate two specifications on midterm and presidential cycles from 1978 through 2018, holding out 2022 and 2024 for out-of-sample validation. The fixed-coefficient benchmark (Model 1) regresses district Democratic vote share on Democratic presidential vote, previous Democratic House vote, the incumbency and open-seat indicators, challenger-quality indicators, log spending ratio, redistricting, and year fixed effects. The nationalization-weighted variant (Model 2) adds interactions of every district-level covariate with the cycle-level nationalization index N_t, so that each slope varies linearly with nationalization.[iii] Both specifications yield high in-sample fit (Model 1: $R^2 = 0.899$, N = 6,897; Model 2: $R^2 = 0.907$). A joint F-test on the ten interactions is statistically significant ($F = 58.5$, $p < .001$), providing strong evidence against the pooled specification. Formally, Model 2 augments the benchmark with the interactions $\gamma_k(x_k \cdot N_t)$; the full specification and coefficient estimates for both models appear in Appendix Tables A1 and A2.

The direction of the interactions confirms the transmission-shift logic. The coefficient on district presidential baseline rises from 0.25 at N = 0 to 0.44 at N = 0.95, consistent with a near-doubling of the weight on national partisan alignment. Coefficients on spending ratio, challenger quality, and the core incumbency effects move toward zero as nationalization rises, consistent with the compression of district-level idiosyncratic factors. These patterns are reflected in Figure 2, which plots the rolling 12-year estimates of the coefficient on presidential vote and of the spending and incumbency coefficients. The weight on Democratic presidential vote nearly triples across the sample period, from 0.23 in windows centered on the early 1980s to 0.61 in windows centered on 2018.

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Figure 2: Changing Weights on District Predictors, 1982–2018



Note: (c) Rolling 12-year estimate of the coefficient on district presidential vote. (d) Rolling estimates of spending-ratio and (absolute) Republican-incumbency coefficients, both compressing toward zero.

Out-of-sample validation confirms the gains from allowing coefficients to vary. For the 2022 midterm, the fixed-coefficient benchmark yields a district-level RMSE of 0.049 and the nationalization-weighted model yields 0.043—a 12% reduction in root mean squared error. For 2024 the respective RMSEs are 0.042 and 0.022—a 47% reduction. Both models correctly classify the same share of contested seats in 2022 (348 of 369), but the nationalization-weighted model correctly classifies 360 of 371 contested seats in 2024 against 358 for the fixed-coefficient benchmark. The 2024 gain is telling: that cycle had a nationalization index of 0.95 near the peak of the distribution, and the fixed-coefficient model's district-level errors are concentrated in exactly the configurations the nationalization-weighted model is designed to handle—high Democratic presidential vote alignment combined with declining incumbency effects. Two broader out-of-sample schemes reinforce the result and show the weighted model's edge widening with nationalization (Appendix Table A4): rolling-origin backtests, which forecast each recent cycle from prior data only, cut RMSE by 19% on average and by 33% since 2016.

The nationalization-weighted model, in contrast, inherits the steepened seat-vote curve of the contemporary period, in which a one-point shift in the national Democratic share moves

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substantially more marginal districts. The consequence, developed formally in the next section, is that correctly specifying the transmission mechanism implies wider—not narrower—prediction intervals.

5. Forecasting the 2026 U.S. House

We generate the 2026 forecast by Monte Carlo. For each of 5,000 simulations we draw a national Democratic two-party House share $s \sim N(0.528, 0.020^2)$, with the mean chosen by applying a conventional Bafumi-Erikson-Wlezien bias correction to the July 2026 generic-ballot aggregate of D+6 and the standard deviation widened to reflect four months of polling drift before Election Day. For each simulation we compute the deterministic district-level Democratic share under the nationalization-weighted model at $N_{2026} = 0.95$ (extrapolated from the 2024 value of 0.954), pin the cycle intercept so that the seat-weighted mean equals the drawn s, and add an independent district-level shock with standard deviation 0.037 (the in-sample residual SD in the 2010-2018 high-nationalization window). District-level shocks are inflated to 0.059 in the nine states that enacted mid-decade redistricting. National conditions, absorbed by the year fixed effects in training, re-enter only through this pinned intercept—it is the sole channel by which the simulated national share s moves districts—and district shocks are drawn independently conditional on s (Appendix Table A4).

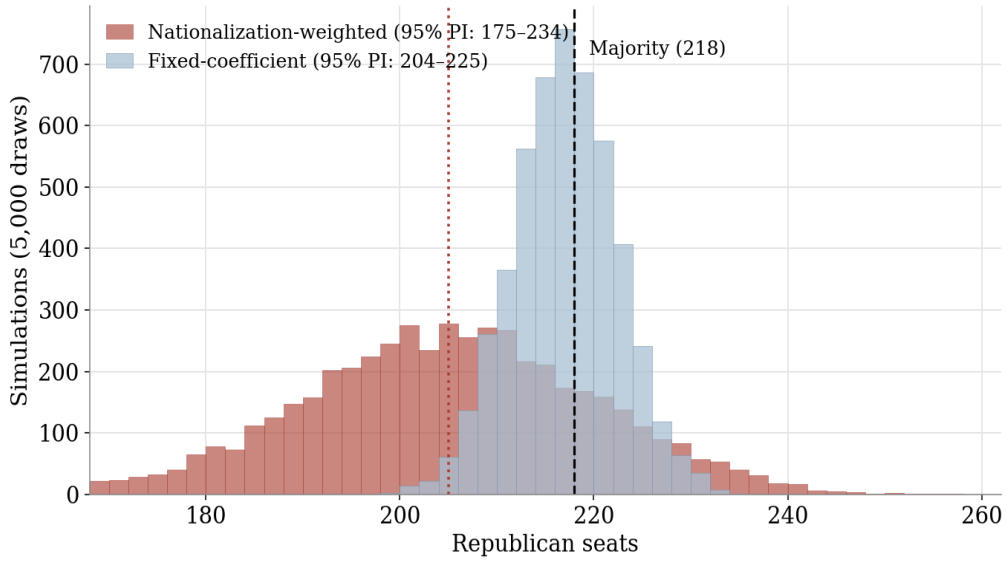
The forecast projects a mean of 204.6 Republican seats in the 120th Congress, with a median of 205. The 50% prediction interval is [195, 215], the 80% interval is [185, 224], and the 95% interval is [175, 234]. The probability that Republicans retain their majority (≥ 218 seats) is 19.9%; the probability that Democrats win the chamber is 80.1%. Figure 3 plots the full distribution of simulated Republican seat counts alongside the corresponding distribution from the fixed-coefficient benchmark.

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The contrast between the two distributions is the paper's central methodological message. The nationalization-weighted model produces a distribution centered somewhat lower than the fixed-coefficient benchmark (mean 205 versus 217 Republican seats), but far wider: its 95% prediction interval spans 59 seats, more than 2.8 times the width of the fixed-coefficient interval of 21 seats. This is not simply a noisier forecast. Decomposing the variance, national-indicator uncertainty contributes a standard deviation of 11.9 seats when district shocks are set to zero, while district-level idiosyncratic variation contributes only 4.2 seats when the national share is fixed. The national component dominates because nationalization has steepened the seat-vote curve. The fixed-coefficient model, inheriting the shallower pooled seat-vote relationship, understates both the House's responsiveness to national conditions and the width of forecast uncertainty. The central forecast and its interval are robust to the 2026 nationalization value, the national-vote standard deviation, the redistricting inflation, the uncontested imputation, and the generic-ballot bias correction (Appendix Table A5).

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Figure 3: 2026 U.S. House Forecast – Republican Seat Distribution



Note: 2026 US House forecast distributions were derived from 5,000 Monte Carlo simulations. The nationalization-weighted model produces a 95% prediction interval of [175, 234] Republican seats; the fixed-coefficient benchmark produces an interval of [204, 225].

Substantively, the forecast paints a picture consistent with the fundamentals of an unpopular second-term incumbent at the midterm. Trump's net approval of roughly -17 and the Democrats' generic-ballot lead of about six points imply a referendum environment of the sort that produced seat losses of 40 in 1994, 30 in 2006, 63 in 2010, and 40 in 2018. Our point estimate implies a net Republican loss of approximately fifteen seats from the 220 they held entering the 119th Congress; the 80% prediction interval admits a swing of anywhere from a modest Republican gain of four to a Democratic wave gain of approximately thirty-five. What the forecast does not do is communicate narrow certainty about any particular outcome within that range—and in this it departs from much of the published forecasting literature.

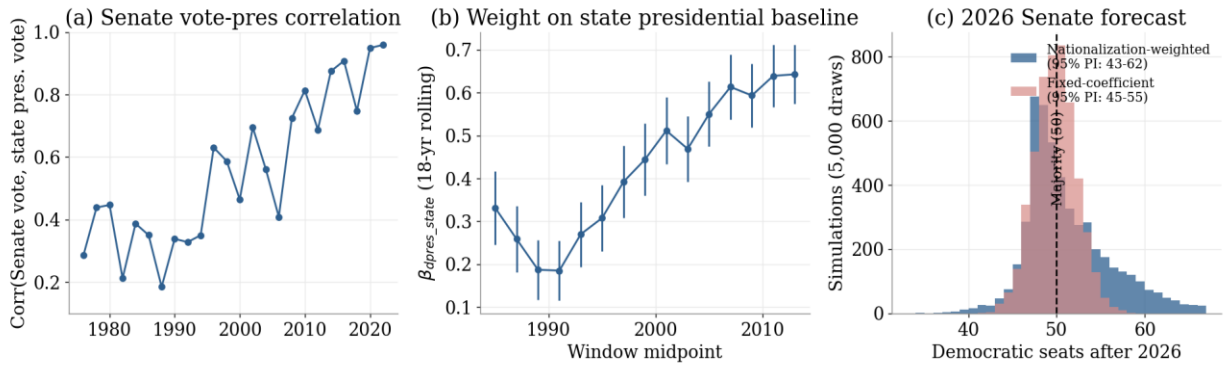
6. The Senate in 2026: A Parallel Check

If the transmission shift documented above is a feature of U.S. congressional politics rather than a quirk of the House, it should appear in the Senate as well. We extend the nationalization-weighted

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framework to the upper chamber using the MIT Election Data and Science Lab's Senate returns, 1976-2020, supplemented by data collected by the authors (MIT Election Data and Science Lab 2017). State-level Democratic presidential baselines are merged in and incumbency indicators are reconstructed by matching candidate surnames and party across cycles. Two methodological differences from the House pipeline follow from the Senate's institutional features: the rolling estimation window is eighteen rather than twelve years (three Senate cycles rather than six House cycles), and the covariate set is limited to the state presidential baseline and incumbency indicators, because Senate-level spending is not consistently coded in the MIT file. We present the Senate as an illustrative cross-chamber check rather than a second fully developed model; comparable estimates and a shift-sensitivity analysis appear in Appendix Tables A3 and A6.

Figure 4: The Senate Parallel



Note: (a) Cross-state correlation between Democratic Senate and presidential vote shares, rising from 0.29 in 1976 to 0.96 in 2022. (b) Rolling 18-year estimates of the coefficient on state presidential baseline. (c) Distributions of simulated Democratic Senate seats in 2026 from 5,000 Monte Carlo draws under the nationalization-weighted and fixed-coefficient specifications.

The cross-cycle pattern is, if anything, more dramatic than in the House. The correlation between state Senate vote and state presidential vote rose from 0.29 in 1976 to 0.96 by 2022 (Figure 4, panel a), a larger absolute shift than the 0.62 to 0.98 movement in the House correlation. Rolling 18-year regressions show the coefficient on state presidential baseline climbing from roughly 0.52 in windows centered on the 1980s to 0.60 in windows centered on the 2010s (panel

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b). Out-of-sample validation on the 2022 Senate cycle reproduces the House result: the fixed-coefficient benchmark returns a state-level RMSE of 0.084, the nationalization-weighted specification returns 0.075, and the joint F-test on the nationalization interactions rejects the pooled specification at $p < 0.001$.

Thirty-three Class II seats are up in 2026 (twenty currently held by Republicans and thirteen by Democrats), alongside two special elections in Florida and Ohio (both Republican-held). Applying the weighted specification with a conventional +2-point Democratic midterm shift and 5,000 Monte Carlo draws produces a mean of 16.6 Democratic wins among the Class II seats, with a 95% prediction interval of [9, 28]. Combined with the 34 Democratic holdovers, this implies a posterior mean of 50.6 Democratic seats (median 49) with a 95% interval of [43, 62], a 49% probability of reaching 50 seats, and a 41% probability of an outright 51-seat majority. The fixed-coefficient benchmark, by contrast, produces a mechanically tighter interval that closes off the upper tail. The +2-point shift is read from the panel itself: the national Senate Democratic two-party vote averages 0.50 across 1976–2022 and runs about two points higher in midterms under Republican presidents; Appendix Table A6 varies it from 0 to +4, and an outright 51-seat Democratic majority requires a wave of roughly four points.

The substantive lesson parallels the House. A state such as Maine—where the Democratic presidential share is approximately 0.53 and the incumbent is a relatively popular Republican—registers as a narrow toss-up under the weighted specification because state-level partisan baselines now carry enough weight to overcome incumbency's eroding advantage. The fixed-coefficient benchmark reads the same state as a safer Republican hold. Where a handful of flips decide control, that distinction matters.

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7. Discussion

Two conclusions follow from the analysis. The first is substantive: the transmission mechanism from national conditions to district-level outcomes has shifted, and long-run structural models developed under earlier transmission regimes are misspecified when applied to contemporary cycles. Allowing coefficients to vary with a measured index of electoral nationalization substantially improves out-of-sample fit and, we argue, produces a more defensible forecast for the 2026 House. The Senate parallel check in Section 6 delivers the same verdict on different data, reinforcing that the transmission problem is a feature of contemporary congressional politics rather than a chamber-specific artifact.

The second conclusion is methodological: nationalization implies wider, not narrower, forecast uncertainty. Forecasters are often tempted to report tight prediction intervals on the grounds that calcified electorates and increasingly predictable district outcomes (Sides, Tausanovitch, and Vavreck 2022) should translate into precise forecasts. Our results suggest the opposite. In a nationalized environment, district-level errors no longer diversify; instead, they covary with national error, amplifying rather than attenuating the seat-level consequences of miscalibrating the national Democratic share. A 59-seat 95% interval is not a confession of ignorance but a consequence of the steeper seat-vote curve the nationalization literature documents.

The challenges of forecasting in a polarized environment, which this special issue identifies as a central concern, are best met not by reporting point estimates with misleadingly tight confidence bands but by making the structural assumptions underlying one's uncertainty visible to readers. Our framework invites forecasters to make explicit how much of their reported uncertainty reflects national-indicator error versus district-level idiosyncrasy, and how the two

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interact under the prevailing nationalization regime. In 2026, national uncertainty dominates, and the resulting interval is substantially wider than headline forecasts communicate.

Our national-indicator priors are drawn from polling aggregates, but prediction markets offer a complementary calibration source that future work should explore. Because market prices weight beliefs by willingness to stake real money, they may discipline both the central tendency and the variance of the national-share distribution on which the seat forecast depends. Whether market-derived priors improve calibration relative to polling-based priors, and how thin liquidity in individual-race contracts limits their usefulness at the district level, remain open empirical questions that bear directly on the uncertainty decomposition we have proposed. The comparative evidence is mixed, however: once polls are properly pooled, poll-based aggregators often match or exceed market prices (Erikson and Wlezien 2008), so markets are best treated as a complement to, not a substitute for, polling priors.

Finally, our forecast is conditional on inputs that will continue to move until Election Day. We recommend treating the 2026 point forecast reported here as a structural estimate—what the nationalization-weighted model implies about seat outcomes given July 2026 conditions—rather than as a final prediction.

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[i] The 2022 cycle registers a lower nationalization score (0.69) than 2018 (0.88) or 2020 (1.00) because abortion-related district variation—concentrated in states with post-Dobbs ballot measures—produced unusually heterogeneous district swings. The correlation component of the index, however, remained at 0.98 in 2022, indicating that the dispersion was idiosyncratic rather than a genuine de-nationalization.

[ii] Nine states enacted new congressional maps prior to July 2026: California, Florida, Louisiana, Missouri, North Carolina, Ohio, Tennessee, Texas, and Utah. Florida's Republican-drawn map was signed May 4, 2026, and is in effect for 2026 after the state supreme court declined to enjoin it (National Conference of State Legislatures 2026). Because our model treats redistricting as added variance rather than a baseline shift, Florida's inclusion widens the interval but does not move the central estimate—though the Republican tilt of the new map is a downside risk for Democrats. Indiana rejected a mid-decade map; Virginia's was struck down.

[iii] Our nationalization-weighted specification linearly interacts every district-level covariate with N_t. A robustness check using a two-regime structural-break design (pre- and post-2010) produces the same qualitative conclusions about the direction of coefficient shifts and the relative out-of-sample performance of the weighted specification.

Acknowledgments:

The authors would like to thank Steve Nicholson and Andy Whitford for helpful conversations related to this article.

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/MDD3IW

Conflicts of Interest:

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

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