

OCTOBER 5, 2026

The final month

A Democratic opening.
A different fight in each chamber.

Prepared by Eli Yokley

- ● 02 The bottom line up front

Environment gives Democrats edge to score the House. The Senate's an open question.

The ballot, the battlegrounds and the policy environment

D+7

Likely-voter ballot

Democrats have the national opening.

Likely voters favor Democrats, 50% to 43%. Independents heavily favor Democrats, though 1 in 5 is undecided. Trump's standing is at a record low as Republicans soften on him.

17 of 22

House toss-ups held by Republicans

The opportunity is uneven across chambers.

Republicans defend most House toss-ups, giving Democrats several routes toward 218. The Senate is tighter. Local approval and open-seat contests shape that test.

24 pts

Lower prices: priority gap

Affordability problems span the map, putting business in focus.

Voters are 24 points more likely to say bringing down prices should be a top priority than to say it is one for Trump. Energy, housing and health care show similar gaps. Those demands shape the agenda for the next Congress.

01

The ballot

The latest vote. The electorate behind it. The context that matters.

Latest likely-voter ballot

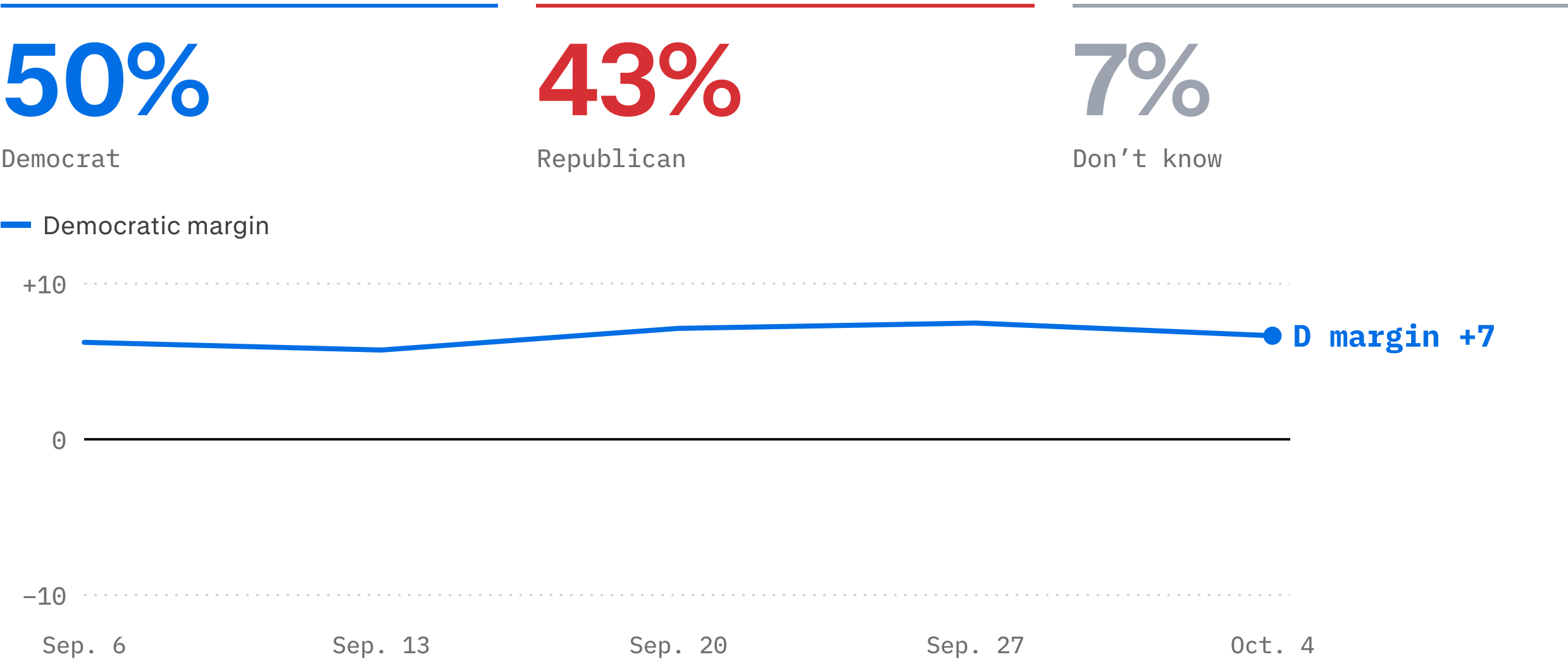
Public mood and election confidence

Cross-cycle context

• 04 The 2026 electorate

Democrats lead likely voters by 7 points

Congressional vote preference • Likely voters, initial choice with no leaners



A steady advantage

Democrats have led in all five weekly likely-voter readings since Sept. 6. The latest lead is D+7, driven by backing from independents, women and suburbanites — key groups to the party's 2018 midterm victories.

Source: Morning Consult • Likely voters, no leaners • Sept. 28-Oct. 4, 2026 • n=17,659

Prepared by Eli Yokley

• ● 05 The 2026 electorate

Democrats lead with and without leaners

Same instrument-week • The headline stays LV/no leaners; the comparisons stay labeled

ELECTORATE	MEASURE	DEM	REP	DK	MARGIN
Likely voters	Initial choice	50%	43%	7%	D+7
Likely voters	With leaners	53%	47%	—	D+6

The bases remain distinct.

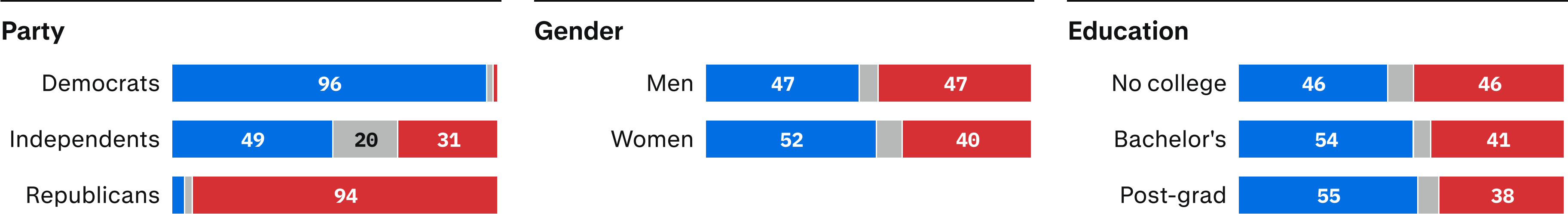
Pushing likely voters who lean one way to pick raises the shares to 53% Democratic and 47% Republican. The Democratic margins round to D+7 initially and D+6 with leaners — effectively the same.

06 The 2026 electorate

The independent vote has more room to move

Likely-voter vote preference · Latest composition by party, gender and education

Democrat Don't know Republican



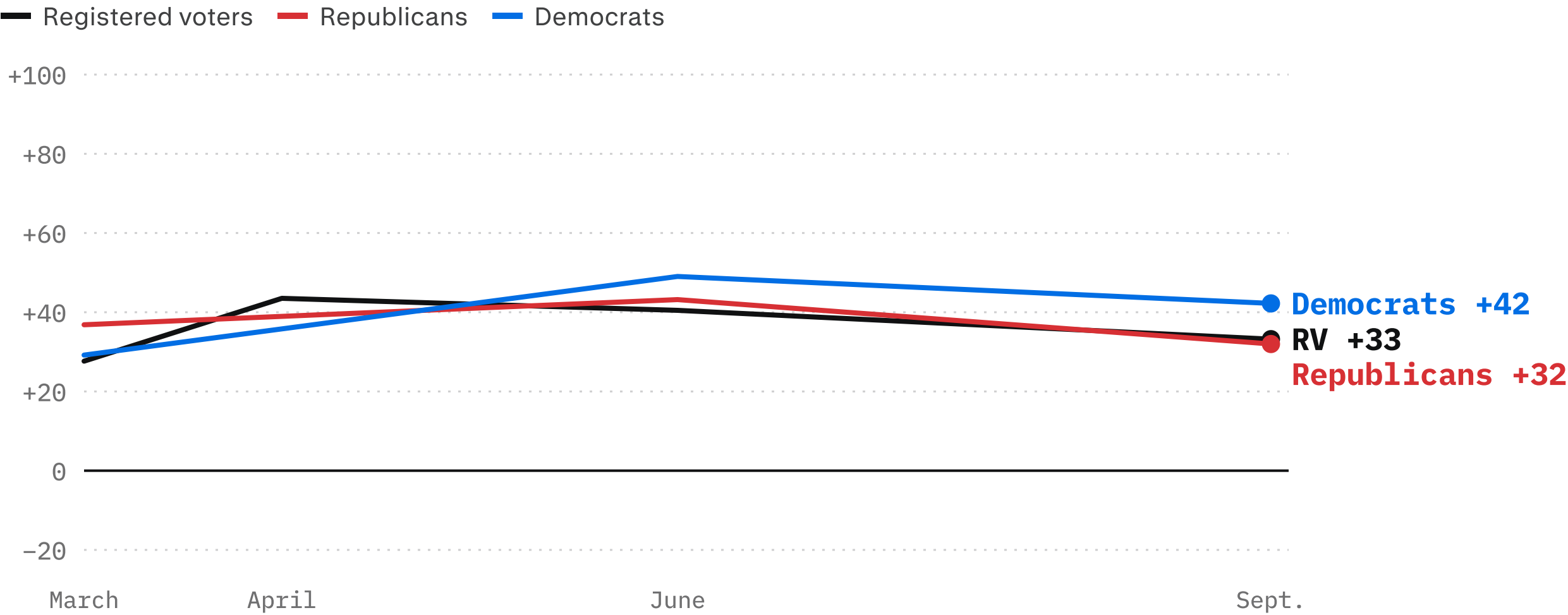
Partisans are settled. Independents are less so.

Independent likely voters favor Democrats, 49% to 31%, with 20% undecided, underlining an opportunity — if they vote. Women and college graduates also give Democrats wider margins than men and voters without a degree.

• 07 The ballot • Election confidence

Election confidence differs by party

Will the 2026 midterm be free and fair? • Net yes among registered voters and partisans



Definitely + probably yes

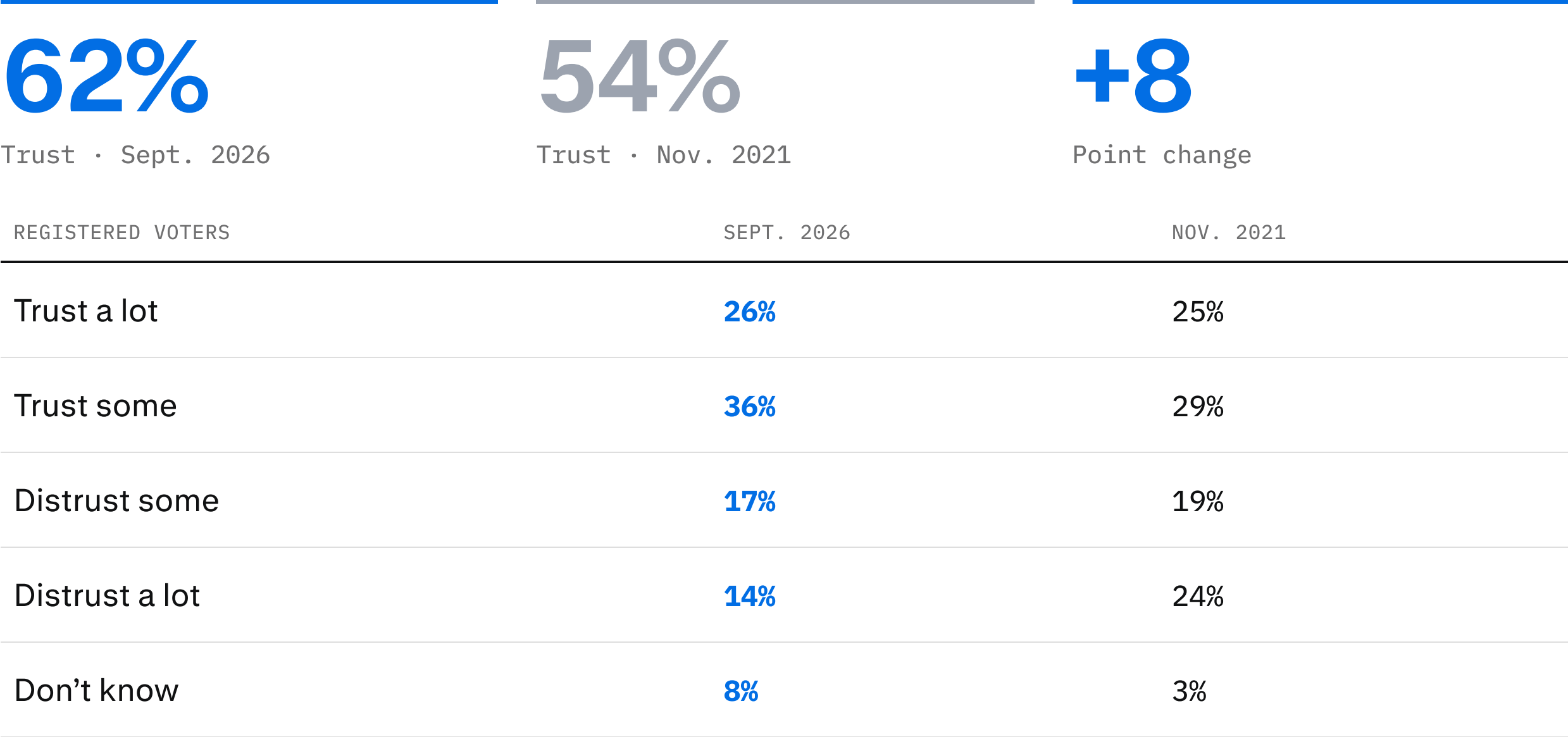
RV AUDIENCE	LATEST	SINCE MARCH
Registered voters	61%	+3
Republicans	61%	-2
Democrats	67%	+7

Net = definitely/probably yes minus definitely/probably no. Changes are percentage points.

• • 08 The ballot • Election confidence

Election-system trust is higher than in 2021

Trust in the U.S. election system • Registered voters



Election confidence has improved

Trust is higher and strong distrust is lower as time has passed since Jan. 6, 2021.

82%

Concerned about future political violence in the June wave, including 41% very concerned.

Earlier context • June 30–July 1, 2026 • RV n=1,415

Source: Morning Consult • Nov. 1, 2021 archive endpoint; Sept. 30–Oct. 1, 2026, n=1,566

• 09 Midterms in context

The ballot lead, at comparable points in the cycle

2018: registered voters • 2022 and 2026: likely voters • Initial ballot choice, no leaners in 2026

READING	ELECTORATE	DAYS OUT	DEMOCRAT	REPUBLICAN	MARGIN
2018 • Oct. 7	Registered voters	30	48%	38%	D+10
2022 • Oct. 8	Likely voters	31	47%	45%	D+2
2026 • Oct. 4	Likely voters	30	50%	43%	D+7

The current lead is D+7.

At 30 days out, the 2026 likely-voter lead is only slightly below the 2018 registered voter margin of D+10. (This is context, not apples-to-apples)

Source: Morning Consult • 2018 and 2026: 30 days out; nearest 2022 reading: 31 days out.

02

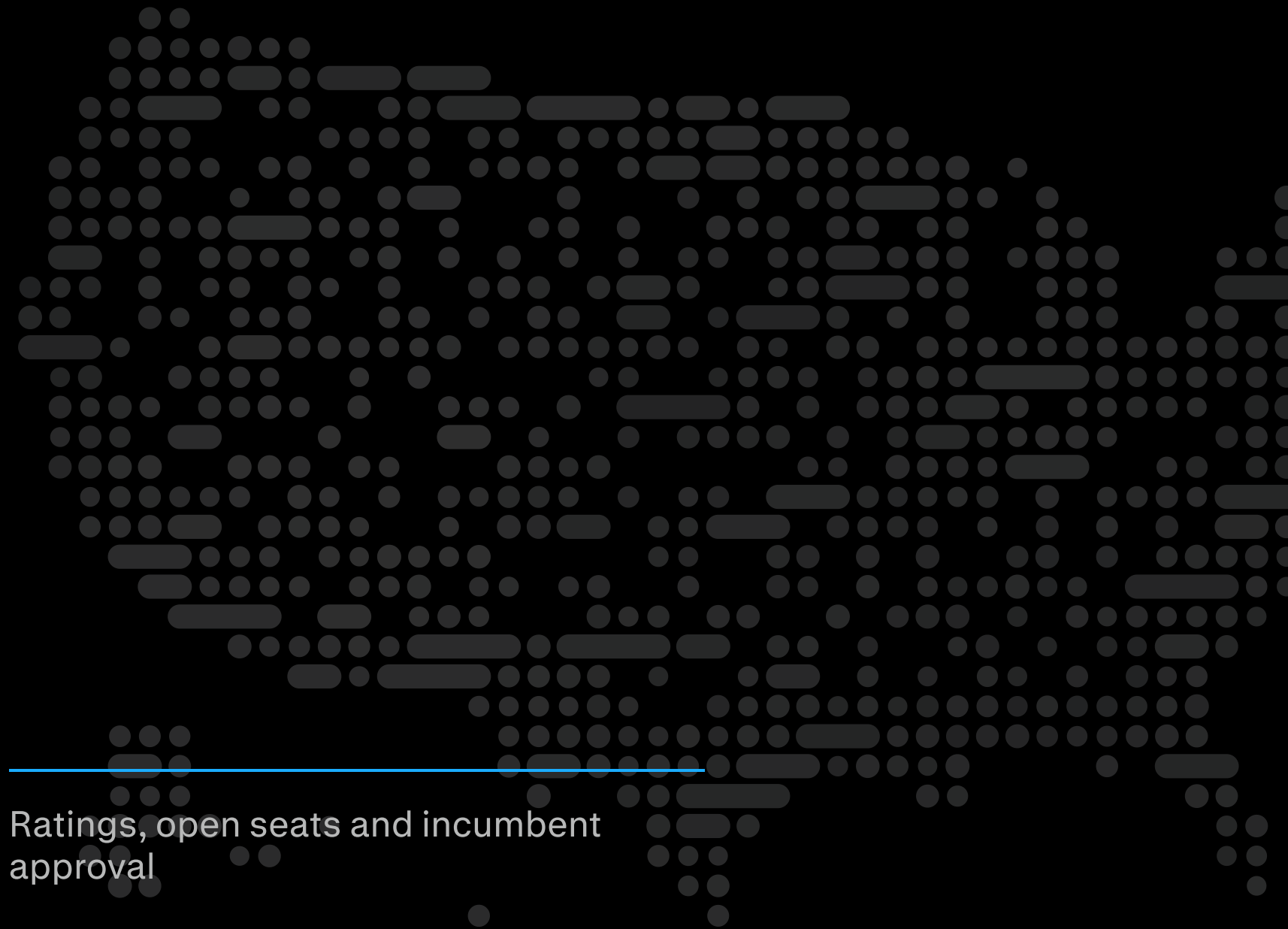
The map

Trump's in bad shape, but state-specifics control the Senate map

The competitive landscape

Where Republicans are exposed

Ratings, open seats and incumbent approval



• • ¹¹ The 2026 map • Competitiveness

Republicans defend more of the competitive seats

Competitive = Lean Democratic, Toss-up or Lean Republican • Incumbent party describes the current holder

House

43

Lean / toss-up contests
■ D-held ■ R-held



17 of 22 toss-ups are Republican-held.

Senate

9

Lean / toss-up contests
■ D-held ■ R-held



5 of 7 toss-ups are Republican-held.

Governors

12

Lean / toss-up contests
■ D-held ■ R-held



4 of 5 toss-ups are Republican-held.

Exposure is not the same as a flip.

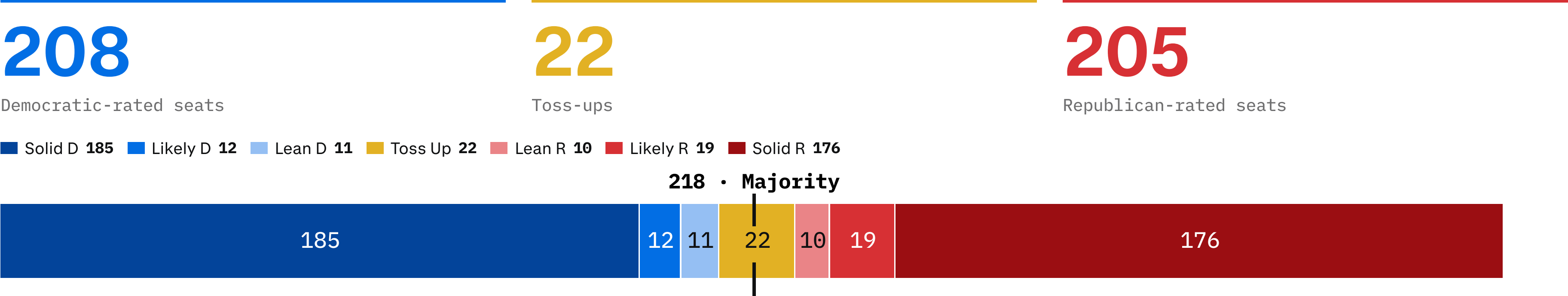
The lean and toss-up categories hold more Republican seats in all three maps. Republican-held seats account for 27 of 43 competitive House contests, seven of nine Senate contests and seven of 12 governor contests.

Source: Cook Political Report • House Sept. 25; Senate Sept. 23; governors Oct. 1

• [12](#) The 2026 map • House

The House ratings stop short of a majority

All 435 House contests • 218 seats for a majority



Democratic side: 208.

Democrats need 10 of the toss-ups to reach 218 if every non-toss-up seat follows its rating.

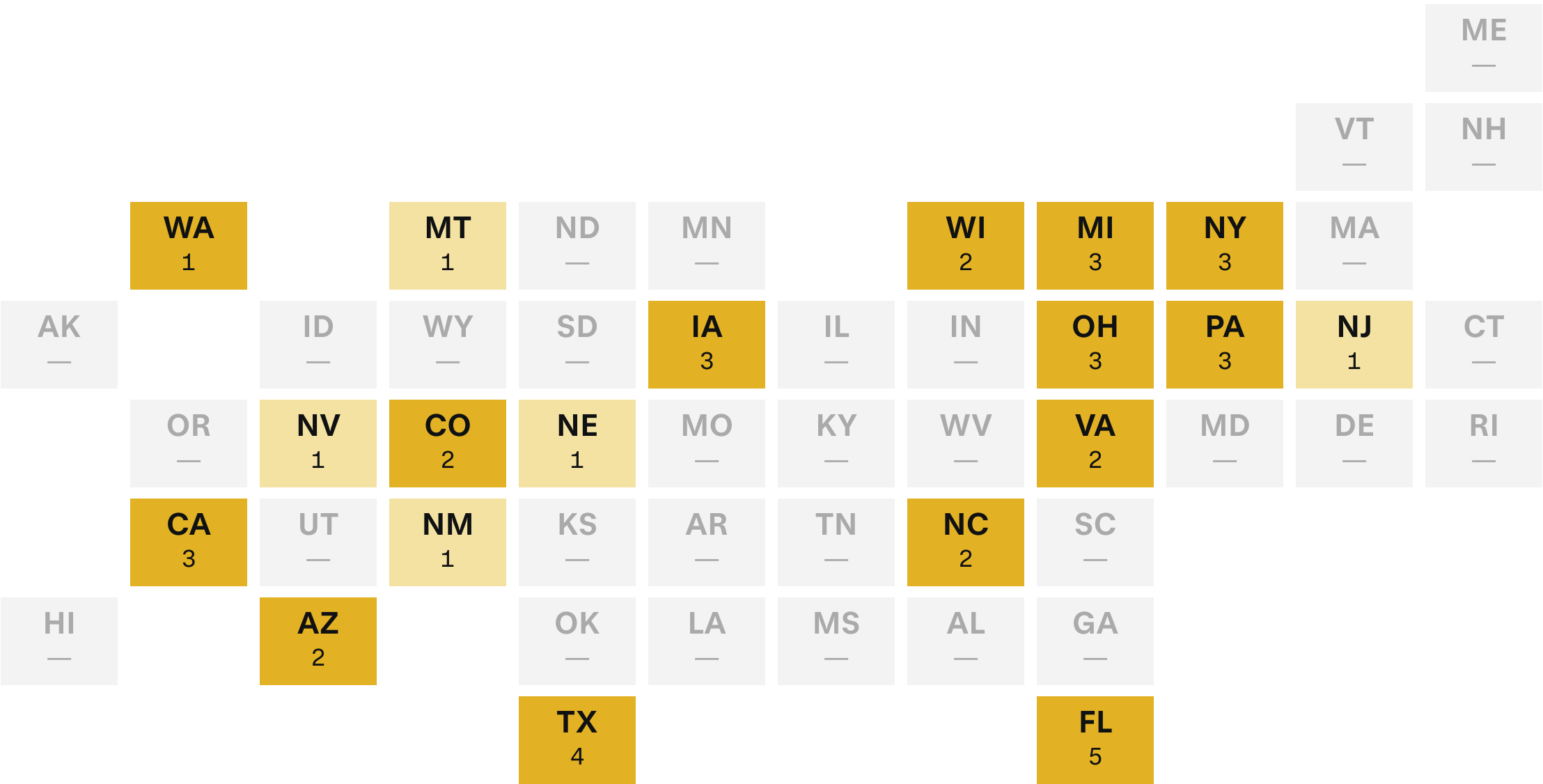
Republican side: 205.

Republicans need 13 of the toss-ups under the same assumption. Ratings are categories, not guarantees.

Source: Cook Political Report • House ratings as of Sept. 25, 2026 • Scenario arithmetic holds every non-toss-up rating fixed

The House battleground is spread across states

Each tile shows the number of lean and toss-up House contests in that state



Start with the 22 toss-ups.

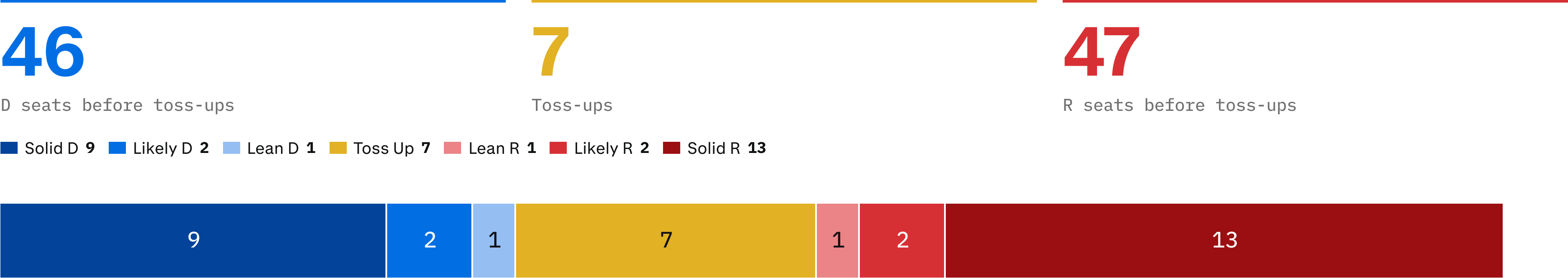
Republicans hold 17 and Democrats hold five. Three are open-seat contests.

- At least one toss-up
- Lean contests only
- No lean / toss-up

• 14 The 2026 map • Senate

The Senate route is narrower

Seat arithmetic holds all non-toss-up ratings fixed • The colored band shows the 35 contests on the ballot



The math.

The Senate has 34 Democratic-held and 31 Republican-held seats not up this year. The ratings place another 12 races on the Democratic side and 16 on the Republican side.

Democrats need 5 of the 7.

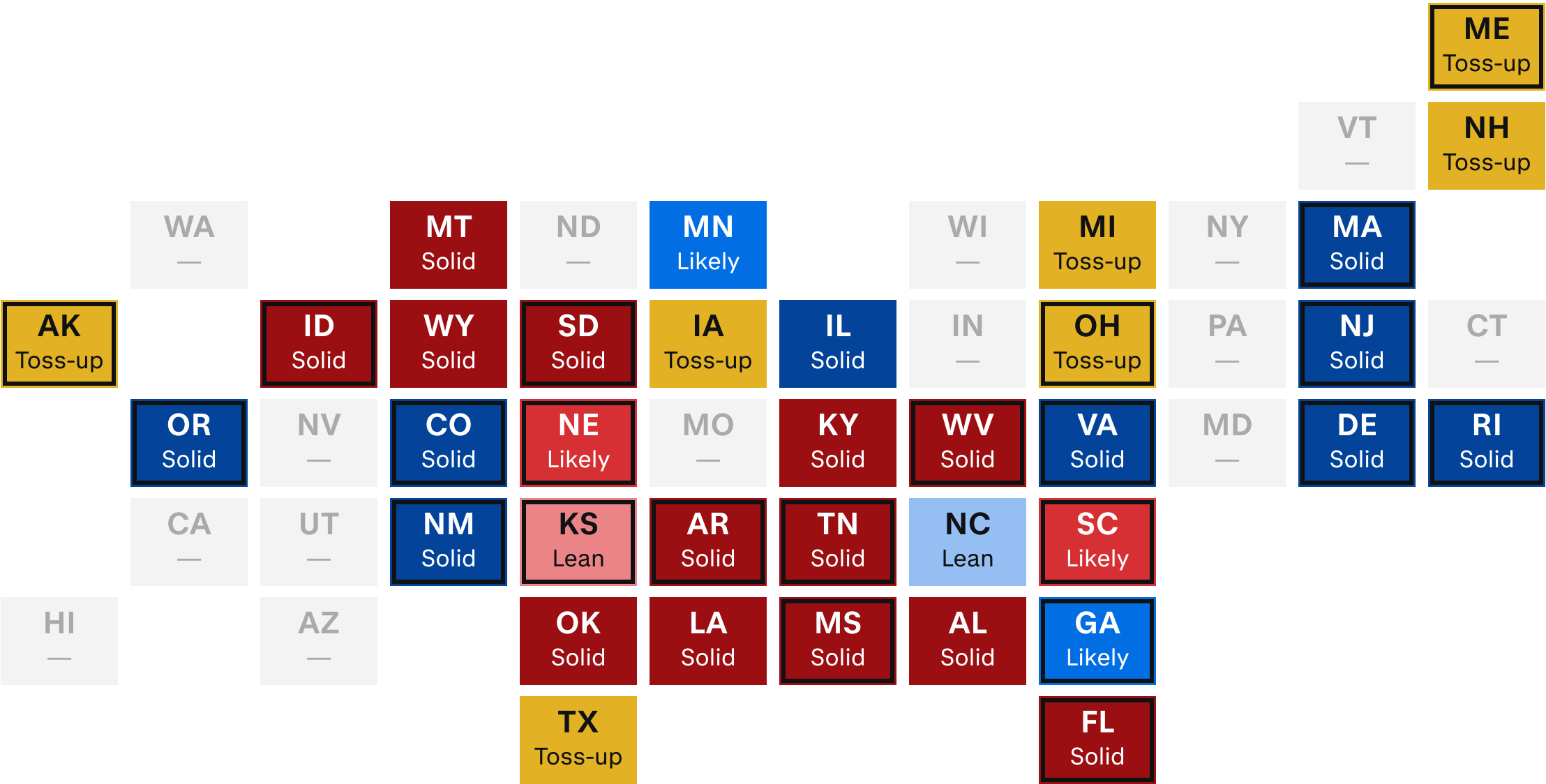
A 51-seat Democratic majority requires five toss-up wins if every non-toss-up race follows its rating.

Source: Cook Political Report • Sept. 23, 2026 • Not-up seats from the supplied snapshot • Conditional arithmetic, not a forecast

• 15 The 2026 map • Senate

The senate map puts open seats in view

35 contests • Cook ratings • Gray tiles have no race



7 toss-ups.

Republicans hold five of the seven toss-ups. Four toss-ups are open seats, making the incumbent-approval comparison less useful in much of the central battleground.

- Solid D 9
- Lean D 1
- Lean R 1
- Solid R 13
- Likely D 2
- Toss Up 7
- Likely R 2
- Incumbent running

• 16 The 2026 map • Senate

The senate toss-ups, up close

Current holder, open-seat status and the local approval environment

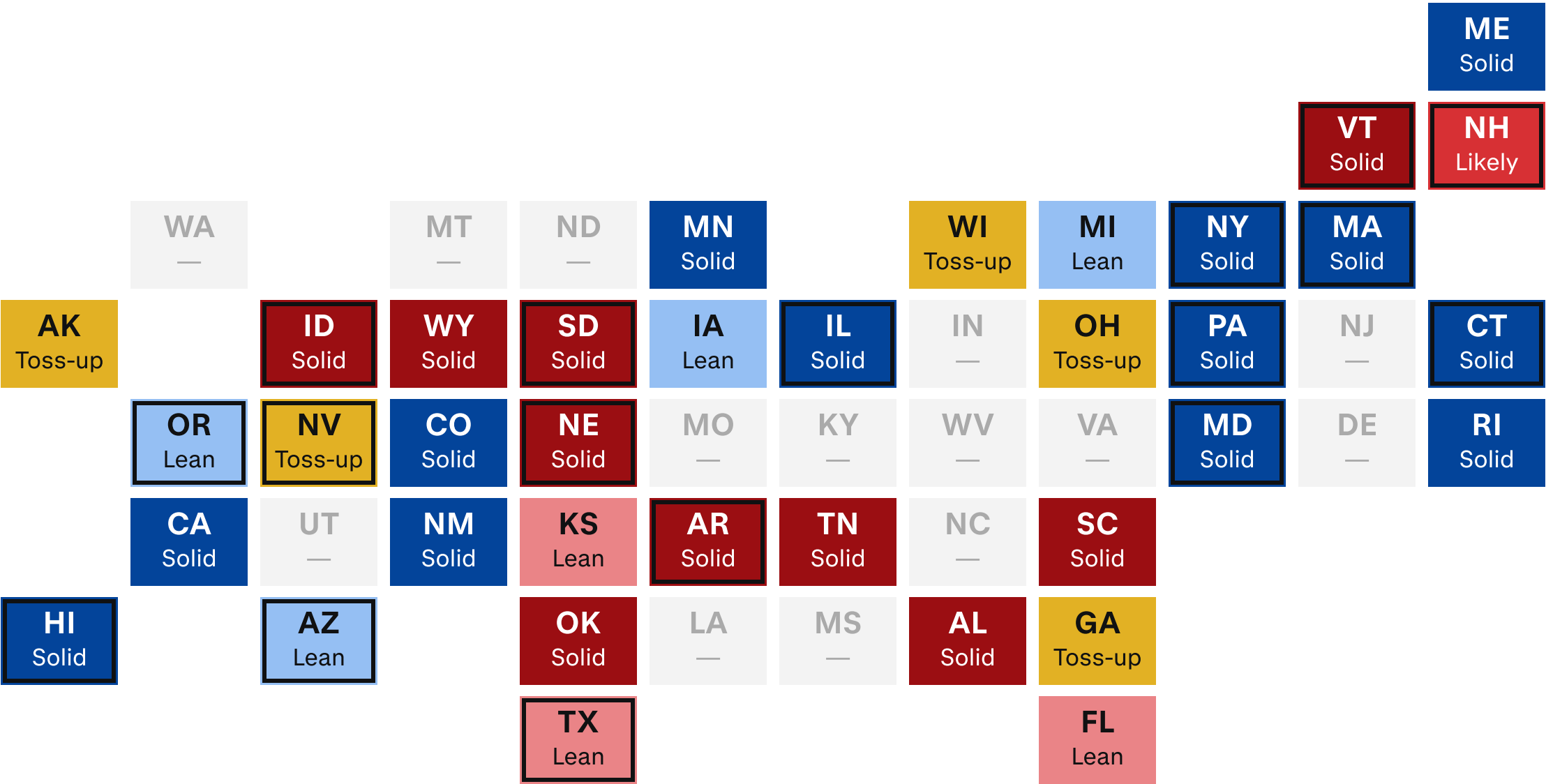
<div>Alaska</div> <div>Toss Up</div> <div>R-held • Incumbent Dan Sullivan running</div> <div>Trump net -18</div> <div>Incumbent net +5</div>	<div>Iowa</div> <div>Toss Up</div> <div>R-held • Open seat</div> <div>Trump net -16</div> <div>Incumbent net -</div>	<div>Maine</div> <div>Toss Up</div> <div>R-held • Incumbent Susan Collins running</div> <div>Trump net -28</div> <div>Incumbent net -21</div>	<div>Michigan</div> <div>Toss Up</div> <div>D-held • Open seat</div> <div>Trump net -20</div> <div>Incumbent net -</div>
<div>New Hampshire</div> <div>Toss Up</div> <div>D-held • Open seat</div> <div>Trump net -21</div> <div>Incumbent net -</div>	<div>Ohio</div> <div>Toss Up</div> <div>R-held • Incumbent Jon Husted running</div> <div>Trump net -11</div> <div>Incumbent net +3</div>	<div>Texas</div> <div>Toss Up</div> <div>R-held • Open seat</div> <div>Trump net -7</div> <div>Incumbent net -</div>	

Source: Cook Political Report • 2026-09-23; Morning Consult state approval • Q3 2026 • Nets = approve minus disapprove

• 17 The 2026 map • Governors

The governors map puts open seats in view

36 contests • Cook ratings • Gray tiles have no race



5 toss-ups.

Four of the five toss-ups are open seats. The contest can turn on the departing governor’s legacy without putting that governor on the ballot.

- Solid D

13
- Lean D

4
- Lean R

3
- Solid R

10
- Likely D

0
- Toss Up

5
- Likely R

1
- Incumbent running

The governors toss-ups, up close

Current holder, open-seat status and the local approval environment

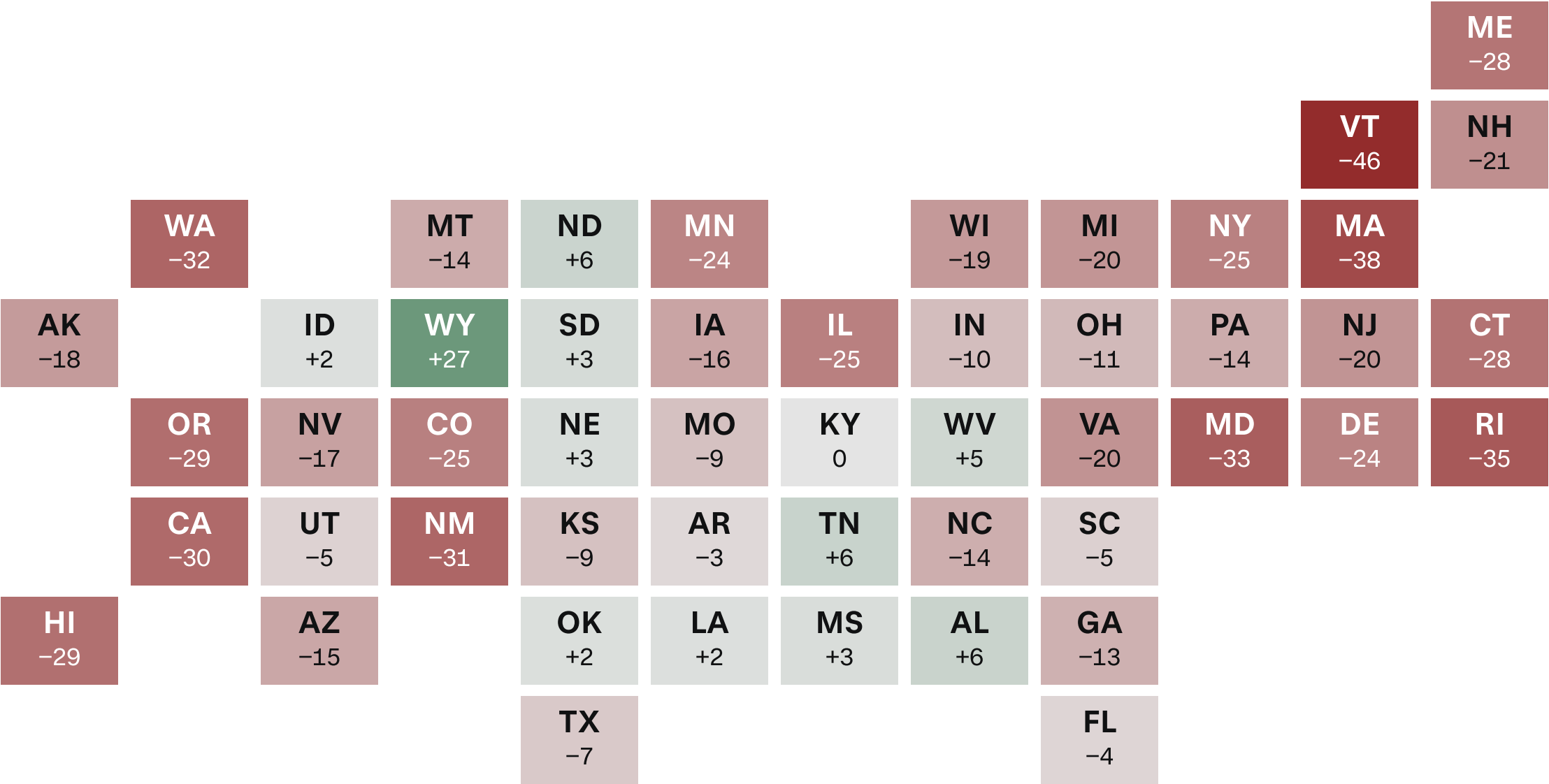
<div>Alaska</div> <div>R-held • Open seat</div> <div>Trump net</div> <div>-18</div> <div>Incumbent net</div> <div>-</div> <div>Toss Up</div>	<div>Georgia</div> <div>R-held • Open seat</div> <div>Trump net</div> <div>-13</div> <div>Incumbent net</div> <div>-</div> <div>Toss Up</div>	<div>Nevada</div> <div>R-held • Incumbent Joe Lombardo running</div> <div>Trump net</div> <div>-17</div> <div>Incumbent net</div> <div>+17</div> <div>Toss Up</div>
<div>Ohio</div> <div>R-held • Open seat</div> <div>Trump net</div> <div>-11</div> <div>Incumbent net</div> <div>-</div> <div>Toss Up</div>	<div>Wisconsin</div> <div>D-held • Open seat</div> <div>Trump net</div> <div>-19</div> <div>Incumbent net</div> <div>-</div> <div>Toss Up</div>	

Source: Cook Political Report • 2026-10-01; Morning Consult state approval • Q3 2026 • Nets = approve minus disapprove

• 19 The map • Presidential approval

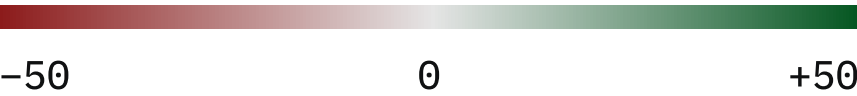
Trump is underwater in 38 states

Trump net job approval • Q3 2026 • Registered voters



A broad drag, with local differences.

Trump’s net approval is negative in 38 states. The state-level environment helps frame the incumbent approval comparisons and the open-seat contests.



Net approval • Approve minus disapprove
Each tile represents one state.

Source: Morning Consult • Q3 2026 • Registered voters by state • Counts use unrounded nets; labels are rounded

03

The national climate

The long trend shows where the opening came from.

Approval and intensity

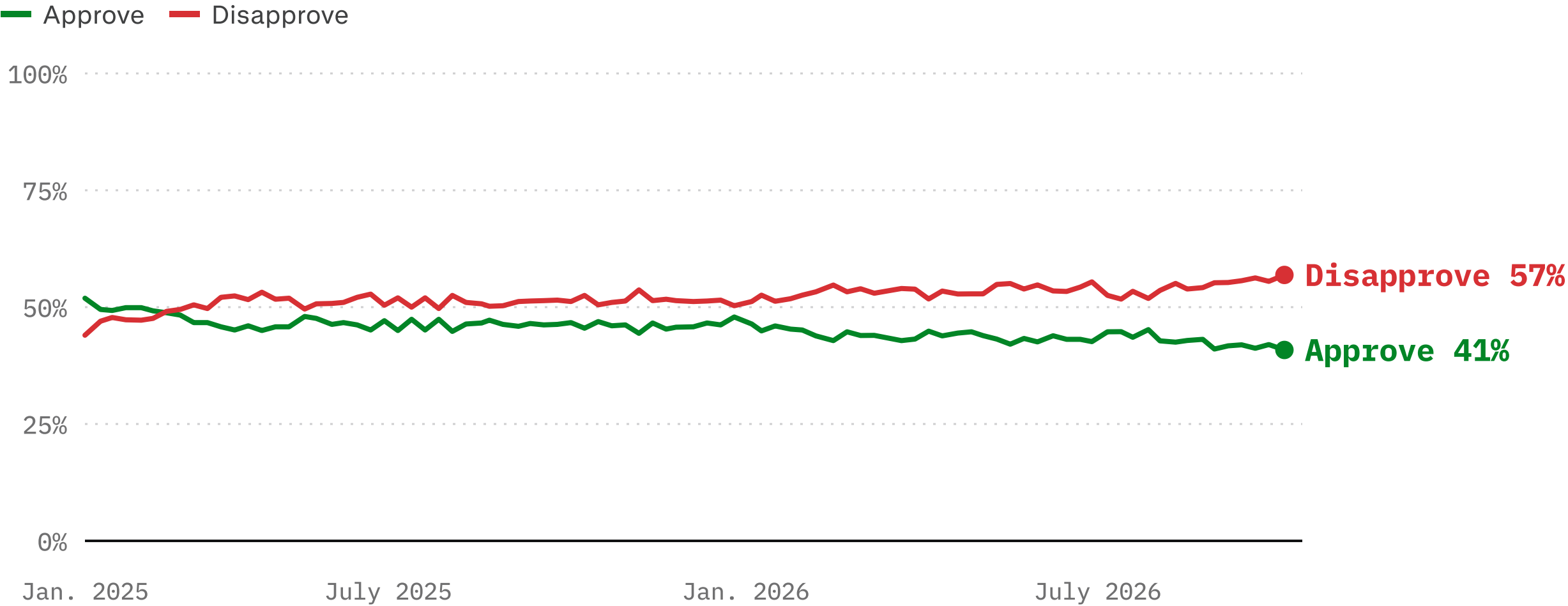
Affordability and perceived focus

Trust, policy and congressional checks

• 21 The national climate • Approval

Trump's governing in the red — and it's getting worse

Trump job performance among registered voters • Weekly readings since January 2025



Trump's at a record low

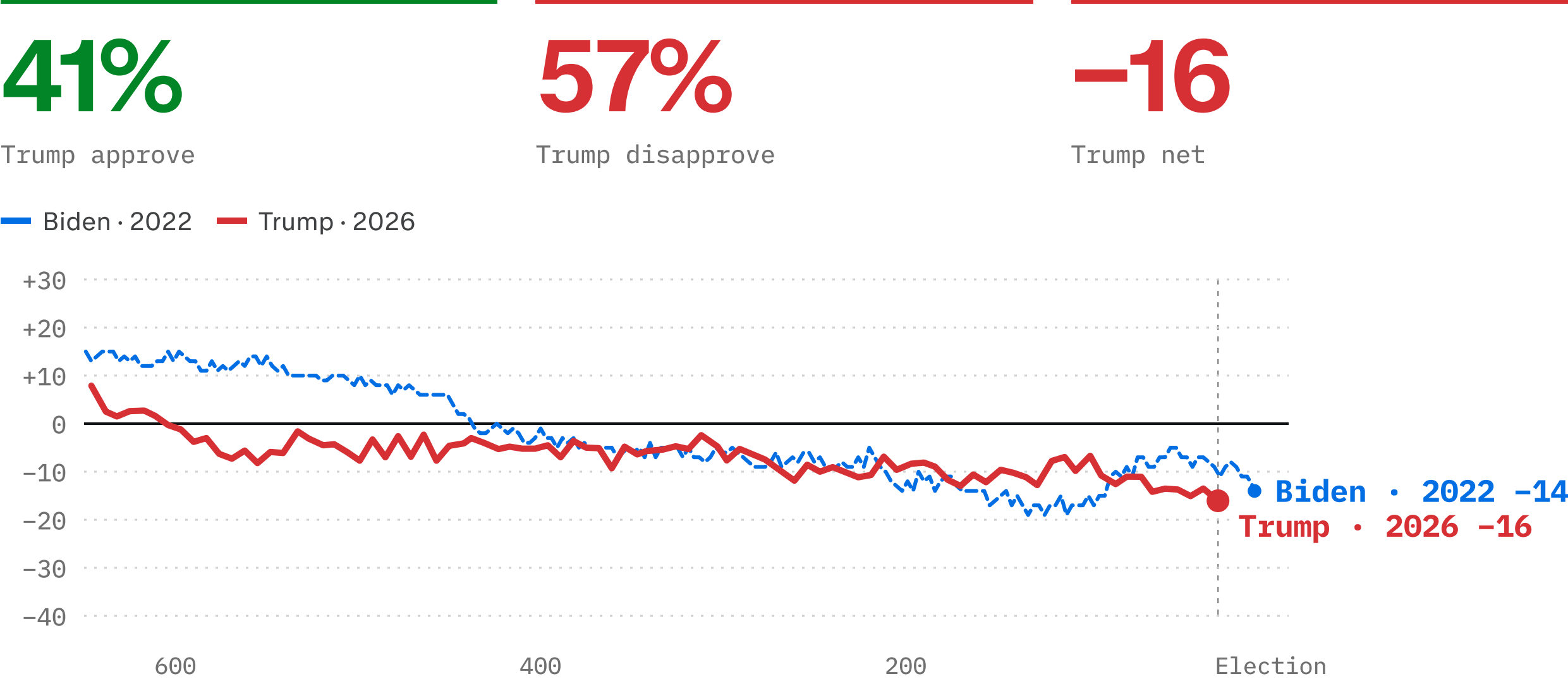
Trump's approval is 41%, while 57% disapprove. His net standing is 16 points underwater, a 3-point deterioration from the prior reading, calculated before rounding.

Source: Morning Consult Political Intelligence • Registered voters • Readings dated Oct. 5, 2026

• 22 Midterms in context

Trump stands below Biden at the same point in 2022

Presidential net job approval



Biden • 2022

Trump • 2026

Weaker than Biden

Trump is 16 points underwater among registered voters, compared with 11 points for Biden among likely voters in the nearest 2022 reading.

Source: Morning Consult • Trump: Oct. 5, 2026, RV, 29 days out; Biden: Oct. 11, 2022, LV, 28 days out

• 23 The national climate • Coalition

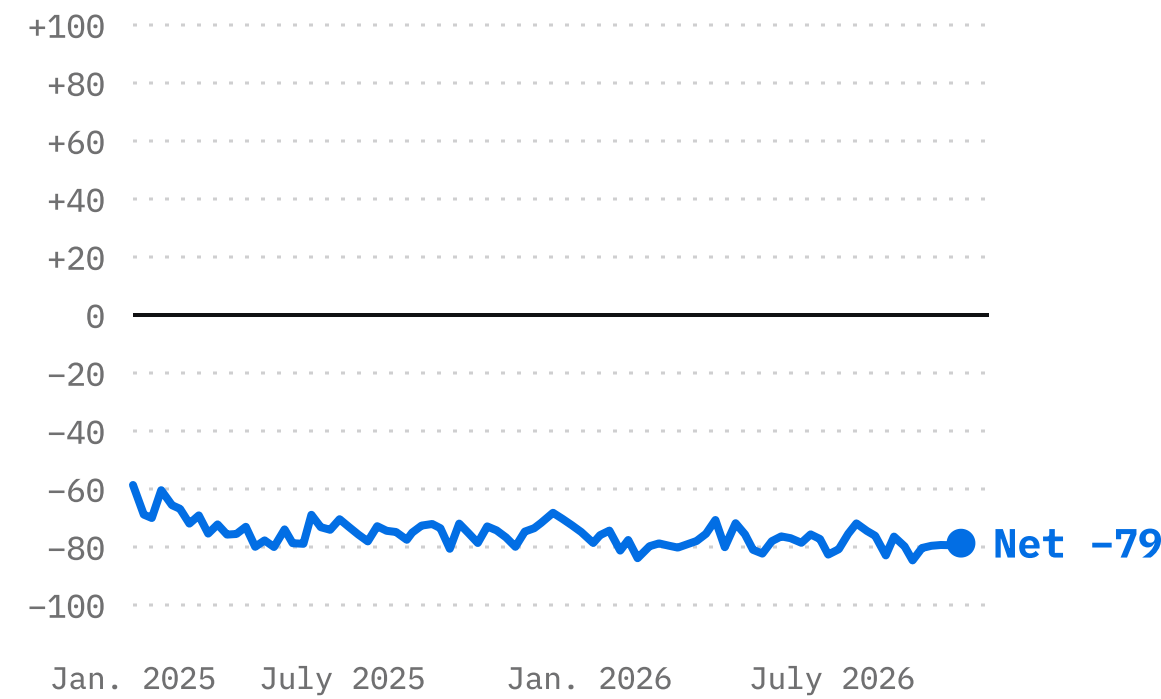
Independents keep Trump deep underwater

Net approval by party • Latest approve/disapprove shares shown before each trend

Democrats

Approve 10% • Disapprove 89%

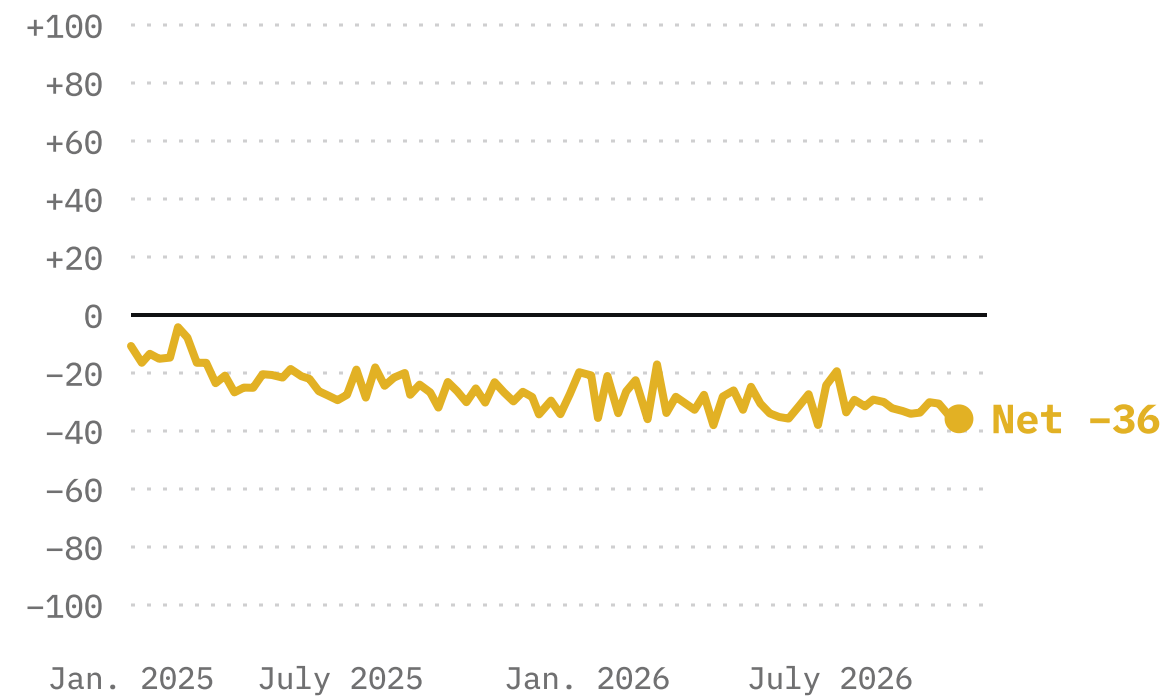
Net approval



Independents

Approve 29% • Disapprove 64%

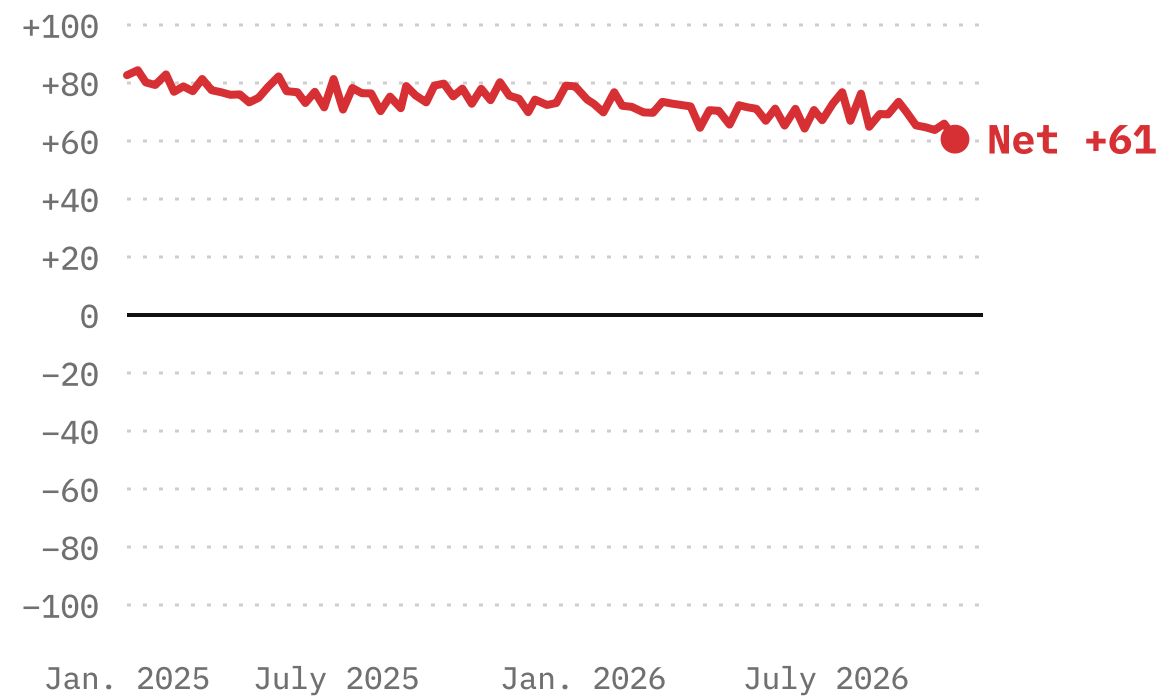
Net approval



Republicans

Approve 80% • Disapprove 19%

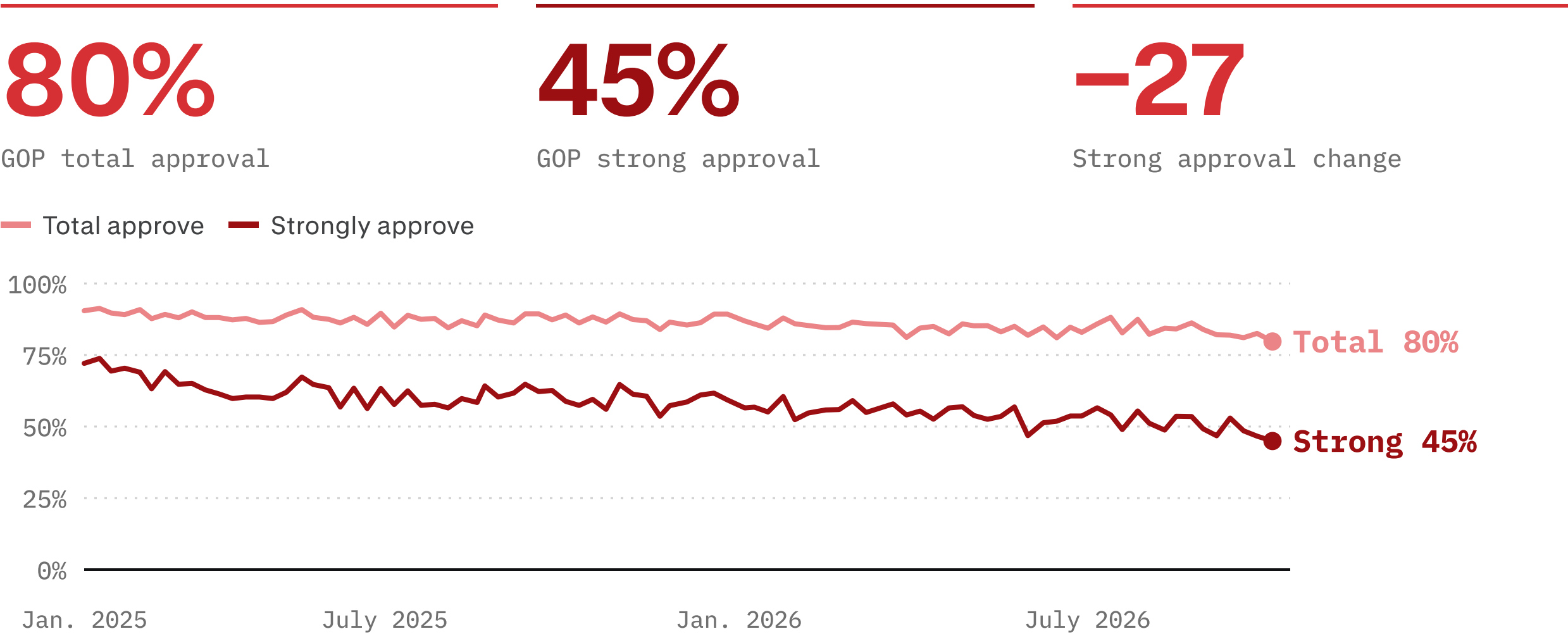
Net approval



• 24 The national climate • Intensity

Republican support has lost intensity

Republican registered voters • Changes since the week ending Jan. 26, 2025



Total approve

Strongly approve

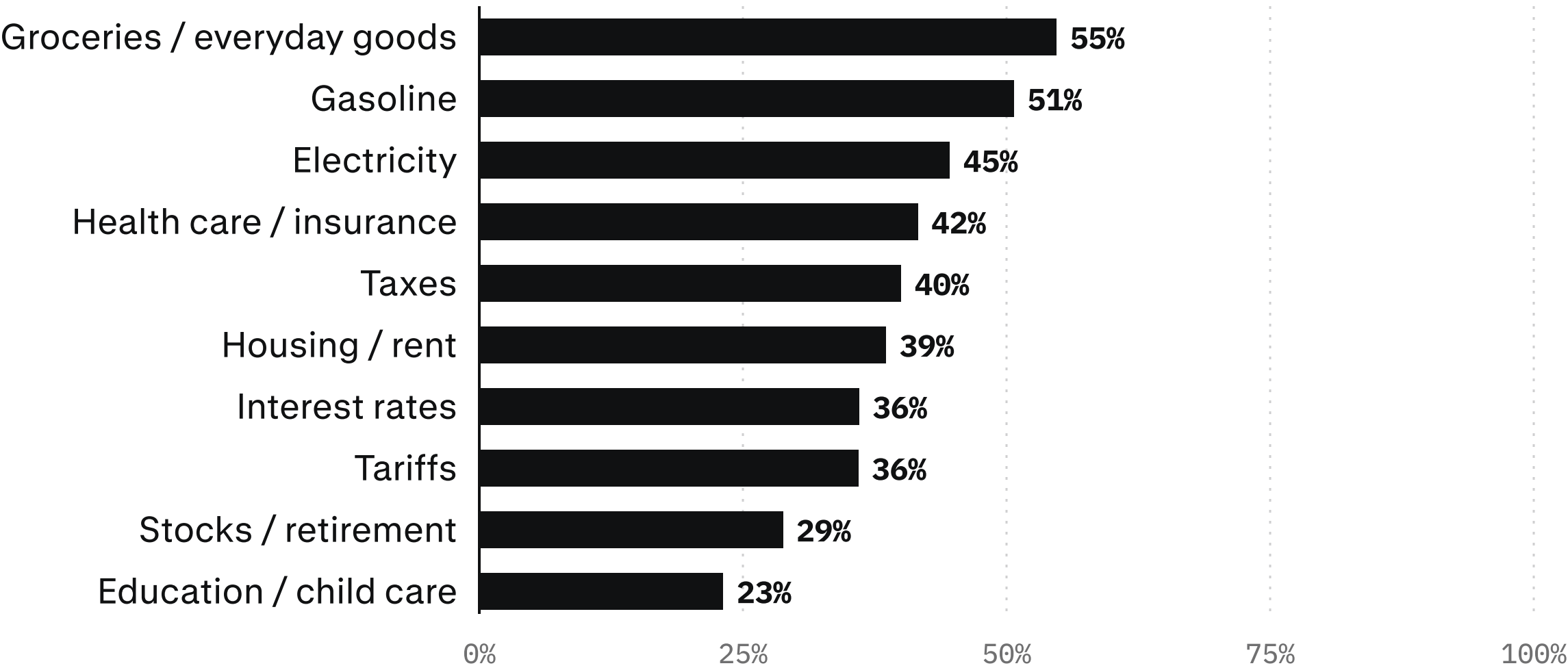
The base is softening on Trump

Republican approval stands at 80%, but strong approval is 45%, down from 72% in the first post-inauguration reading. The intensity loss is larger than the topline decline.

• 25 The national climate • Affordability

Affordability reaches beyond the electricity bill

Share saying each item has a major impact on their own finances • Registered voters



The pressure is broad.

Groceries and gasoline have a major impact on the finances of about half of voters. Electricity, health care, taxes and housing extend that pressure across the household budget.

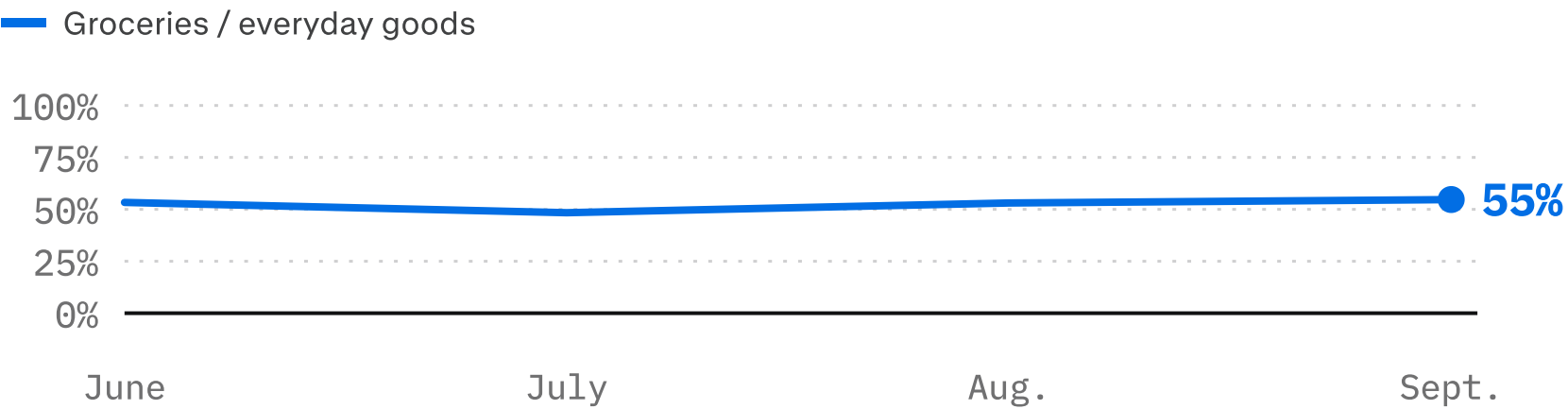
Source: Morning Consult • Registered voters • Sept. 30–Oct. 1, 2026 • n=1,566 • Full question: current impact on your financial situation

• 26 The national climate • Affordability

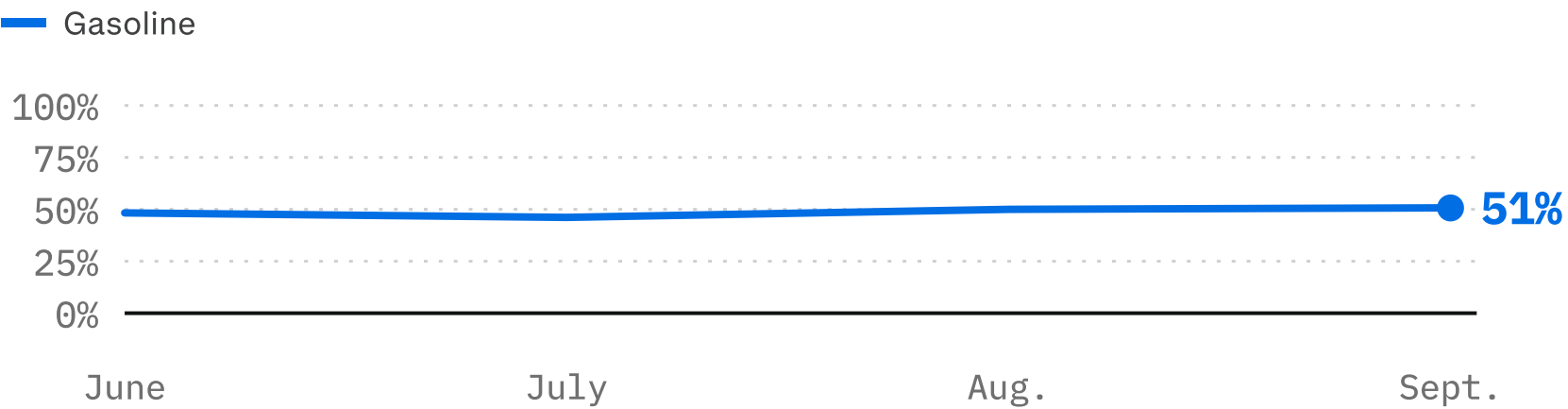
The household-cost picture, across four waves

Major impact on personal finances • Registered voters

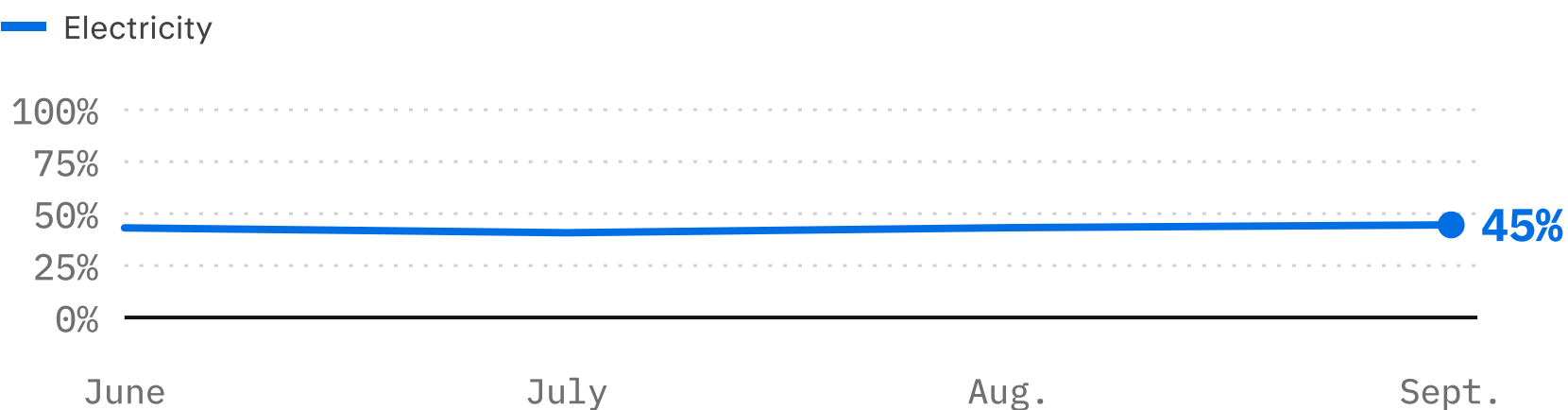
Groceries / everyday goods



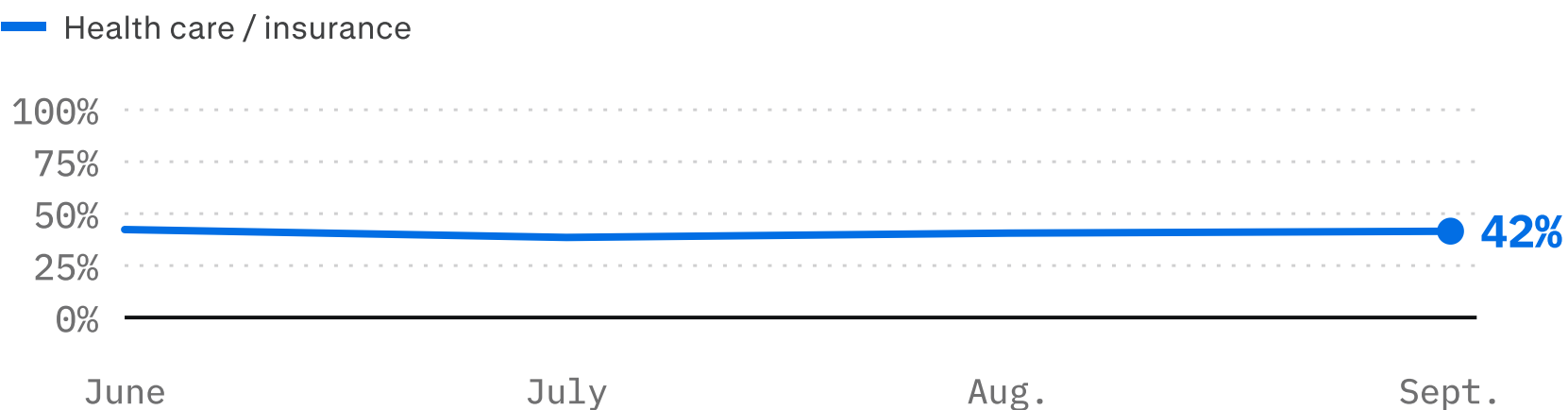
Gasoline



Electricity



Health care / insurance



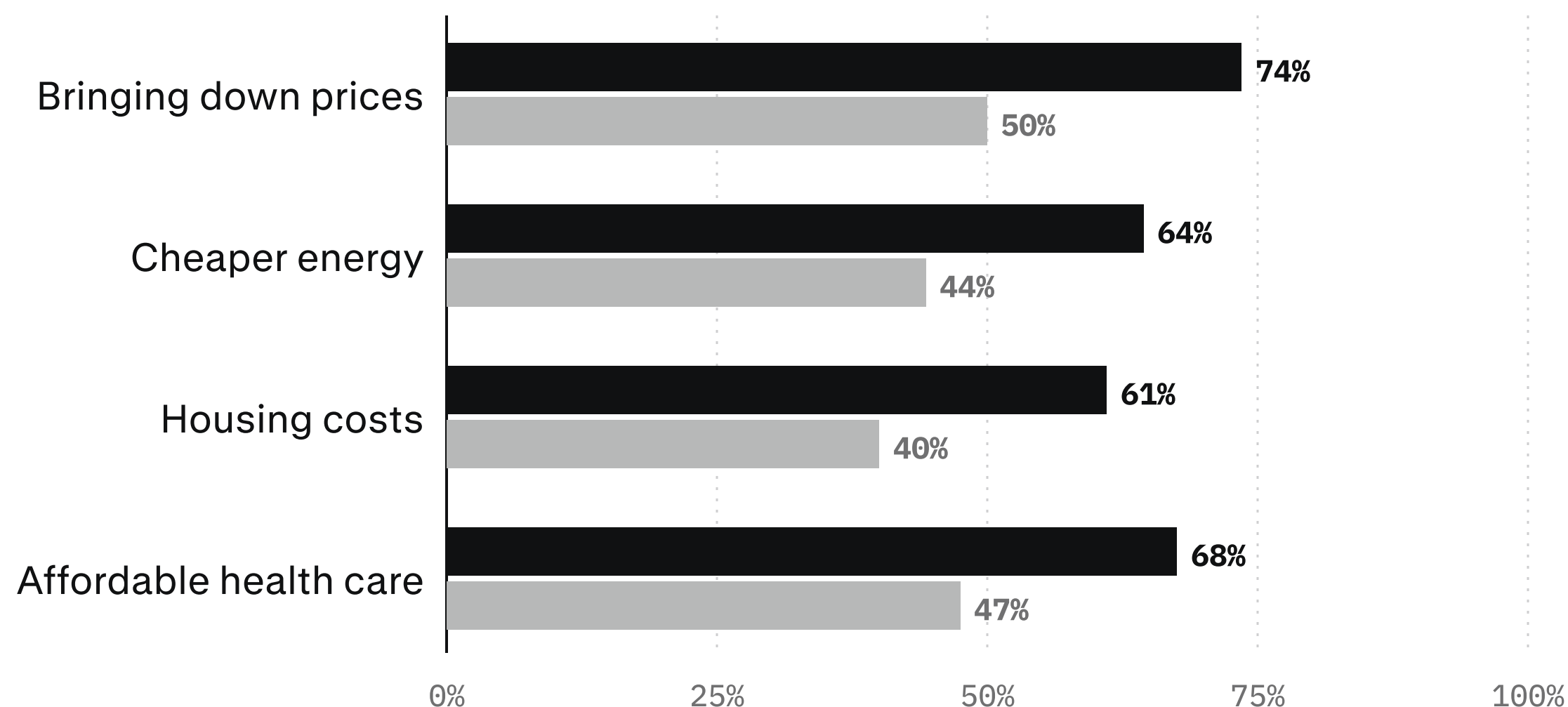
Source: Morning Consult monthly tracker • June–September 2026 waves • Latest fieldwork Sept. 30–Oct. 1

• 27 The national climate • Priorities

Voters want more attention to affordability

Share saying each should be / is a top priority for the Trump administration

■ Should be a top priority ■ Is a top priority



The same story across industries

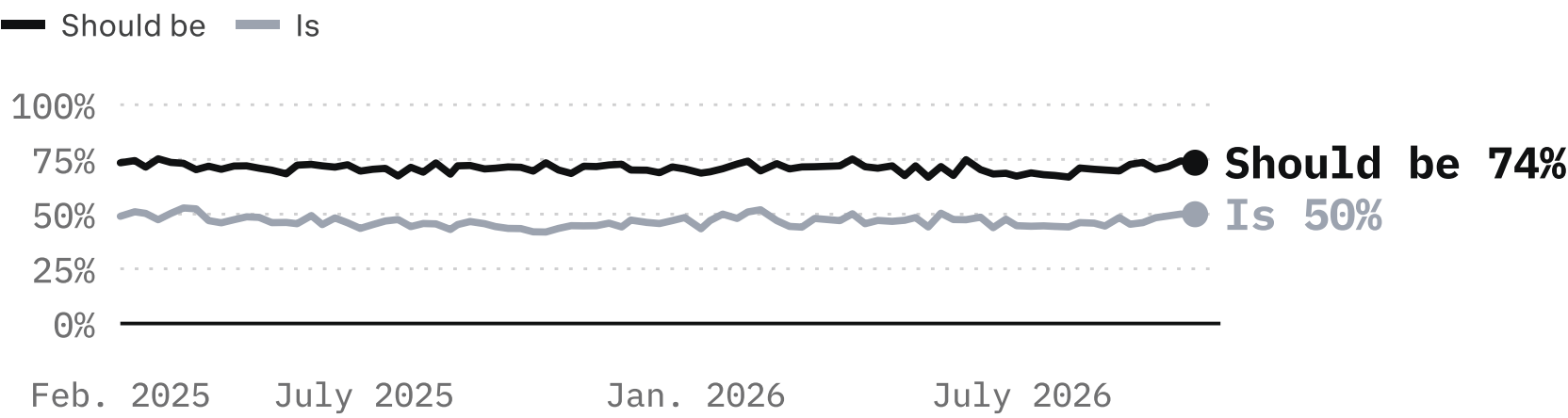
Voters are 24 points more likely to say lower prices should be a top priority than to say they are one. The gaps are 20 points on energy, 21 on housing and 20 on health care, gaps that have persisted during Trump's term after his successful 2024 campaign that benefited from voters' affordability concerns.

• 28 The national climate • Priorities

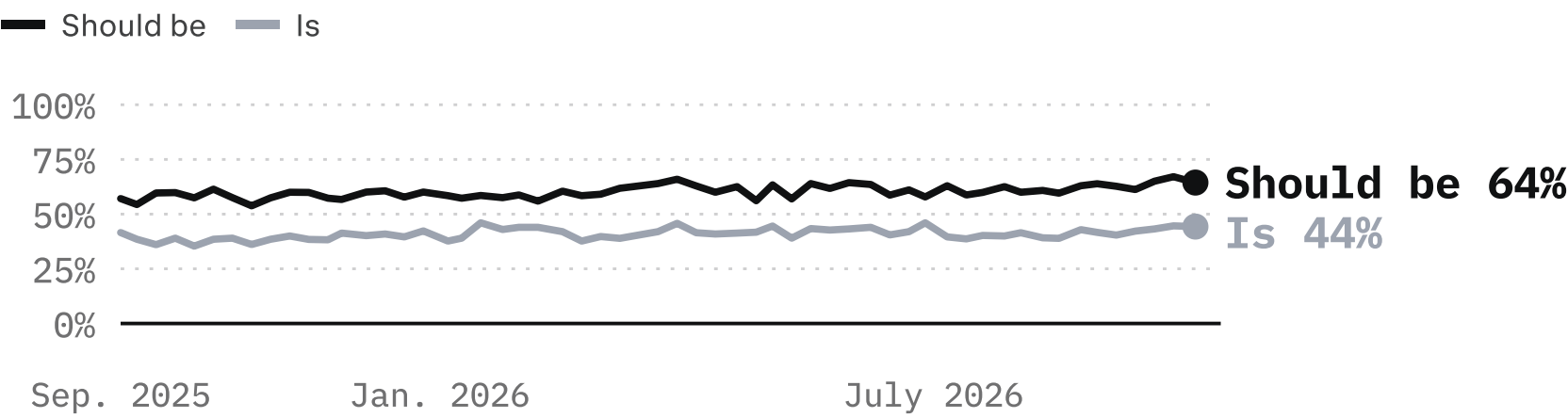
The affordability gap has persisted

Share saying each should be / is a top priority

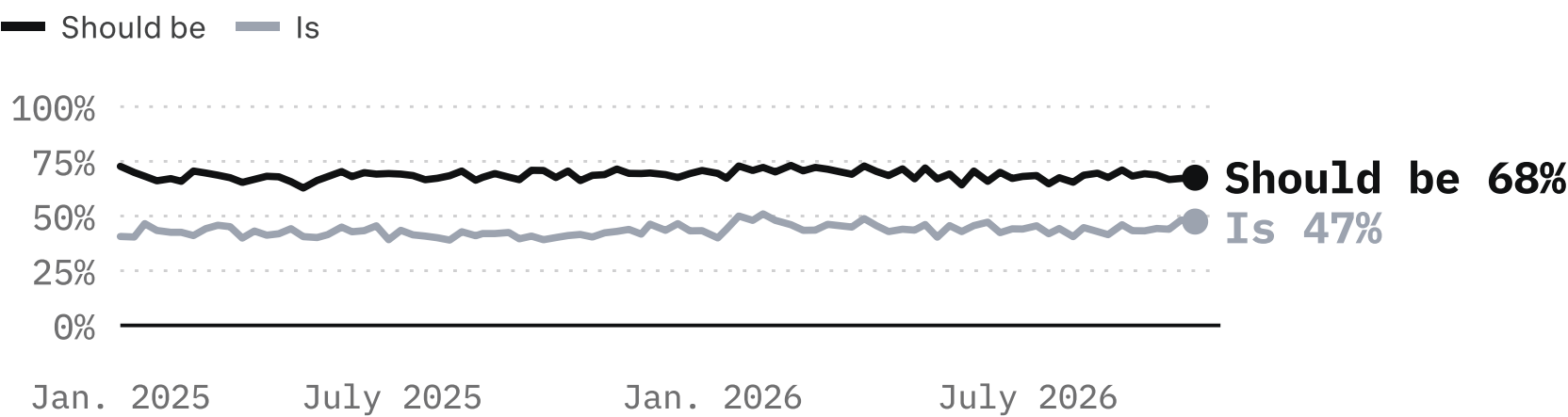
Bringing down prices



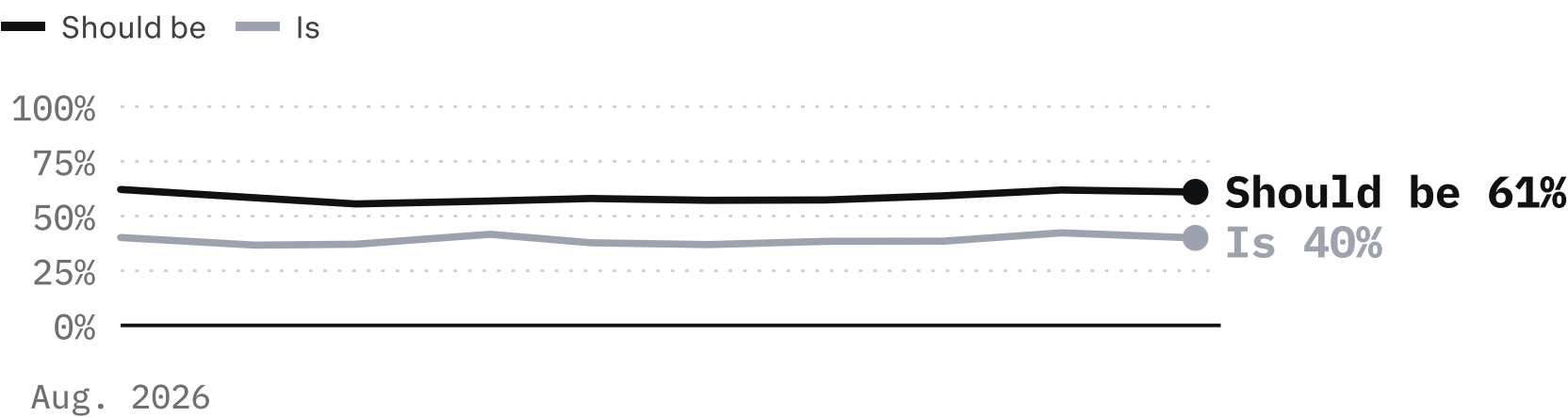
Cheaper energy



Affordable health care



Housing costs



Source: Morning Consult Political Intelligence • Registered voters • Readings dated Oct. 5, 2026

• 29 The national climate • Trust

Democrats lead on costs. Voters divided on security.

Party trusted more to handle each issue • Cost-related issues highlighted in blue

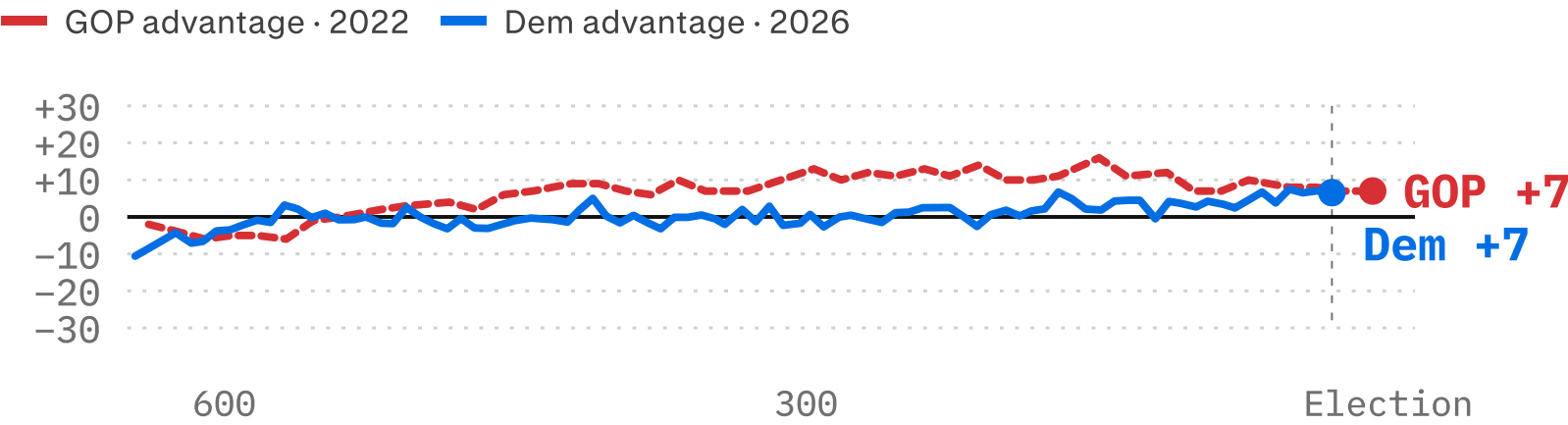
<div>LGBTQ+ rights</div> <div>D+26</div> <div>D 50 • R 24 • DK 26</div>	<div>Abortion</div> <div>D+18</div> <div>D 51 • R 33 • DK 16</div>	<div>Medicare / Social Security</div> <div>D+16</div> <div>D 51 • R 35 • DK 14</div>	<div>Health care</div> <div>D+16</div> <div>D 51 • R 35 • DK 14</div>
<div>Housing</div> <div>D+13</div> <div>D 49 • R 35 • DK 16</div>	<div>Energy</div> <div>D+9</div> <div>D 46 • R 37 • DK 16</div>	<div>The economy</div> <div>D+7</div> <div>D 46 • R 40 • DK 14</div>	<div>The national debt</div> <div>D+5</div> <div>D 43 • R 38 • DK 19</div>
<div>Taxes</div> <div>D+4</div> <div>D 44 • R 40 • DK 16</div>	<div>Foreign policy</div> <div>D+3</div> <div>D 43 • R 40 • DK 17</div>	<div>Trade</div> <div>D+1</div> <div>D 42 • R 41 • DK 17</div>	<div>Immigration</div> <div>R+1</div> <div>D 43 • R 44 • DK 13</div>
<div>National security</div> <div>R+3</div> <div>D 41 • R 44 • DK 15</div>			

• 30 Midterms in context

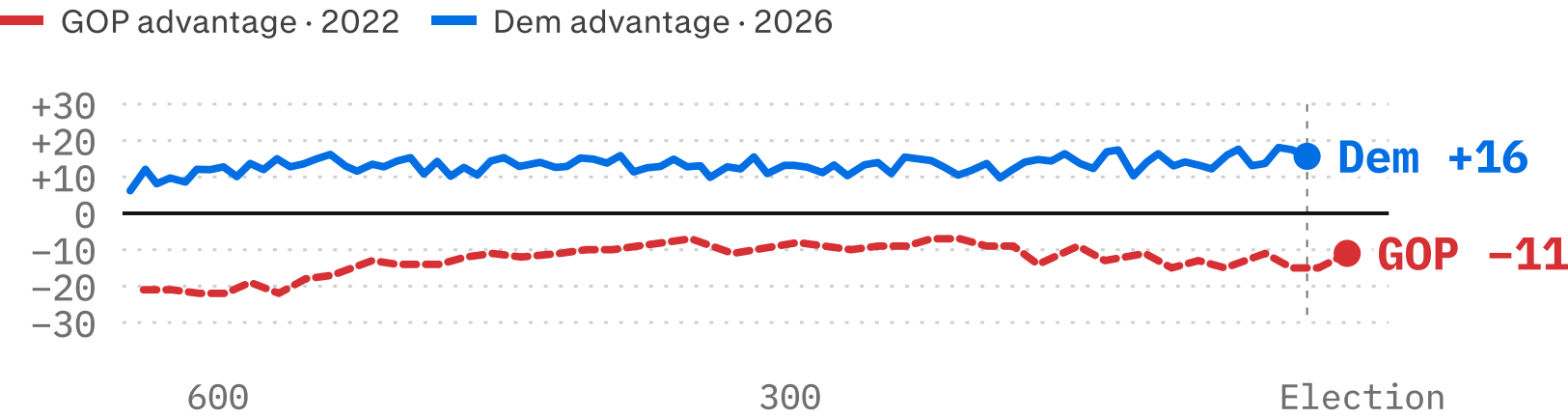
The economy is the clearest reversal from 2022

Republican advantage in 2022 versus Democratic advantage in 2026 • Registered voters

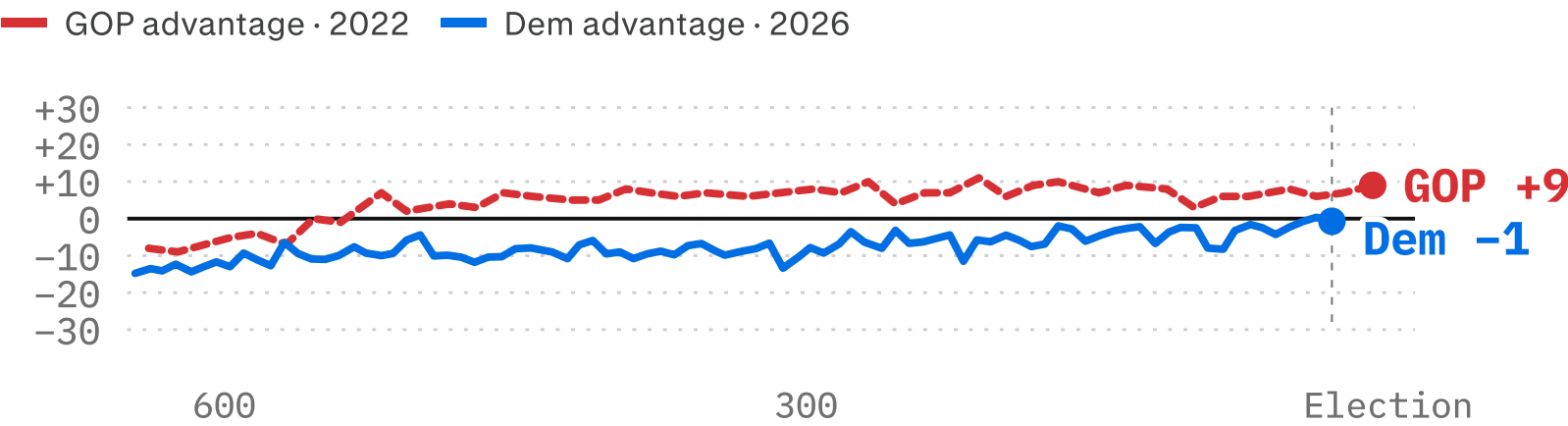
Economy



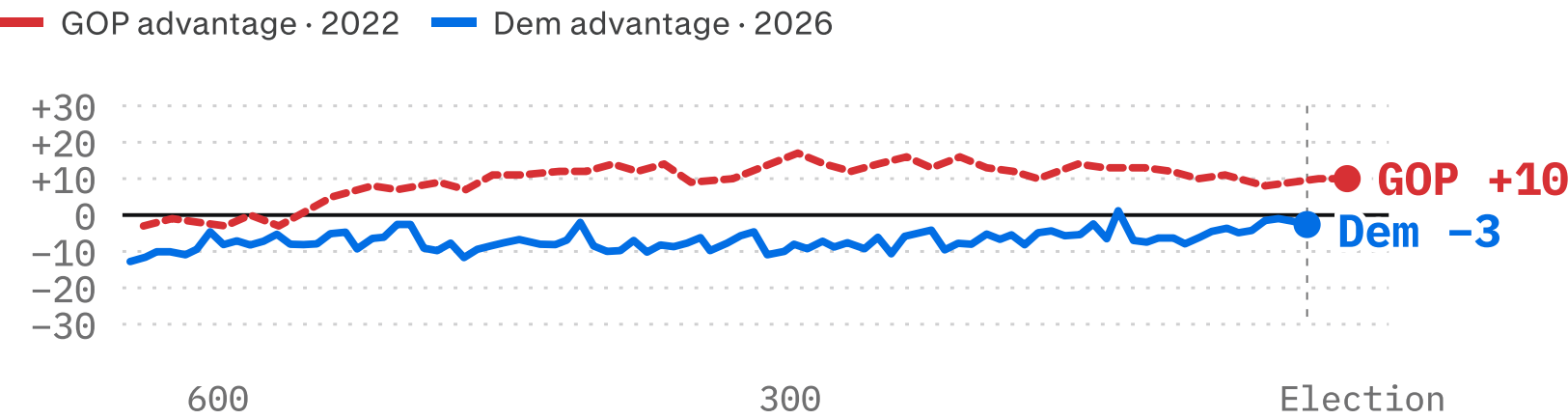
Health care



Immigration



National security

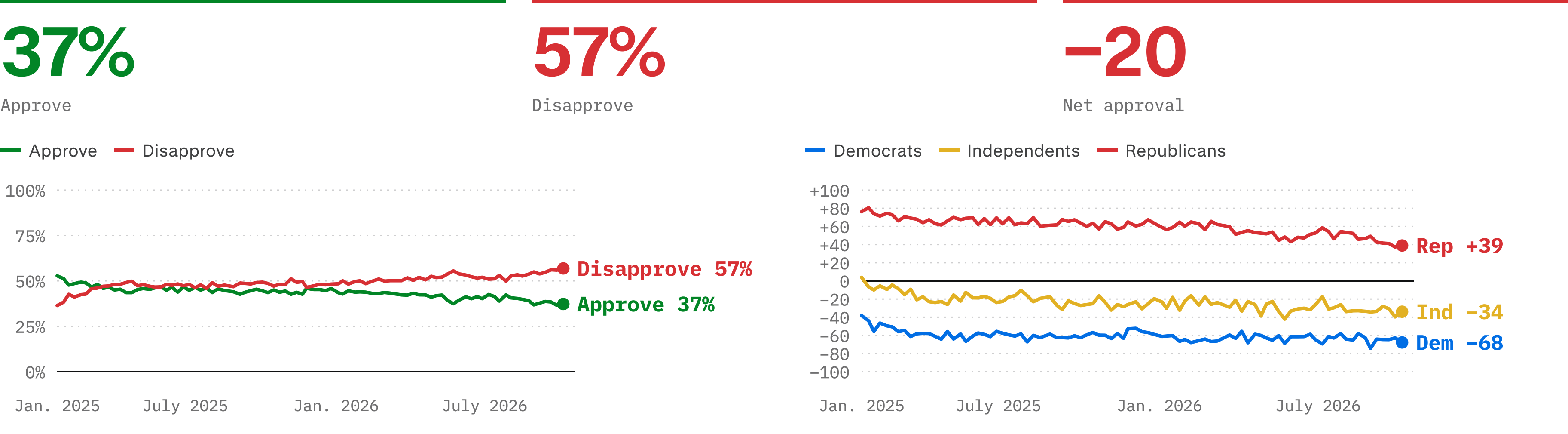


Source: Morning Consult • RV • 2022 = Republican minus Democratic trust; 2026 = Democratic minus Republican • Current 2026 series refreshed through Oct. 5.

• • 31 The national climate • Economy

The economy moved from the GOP's asset to a liability

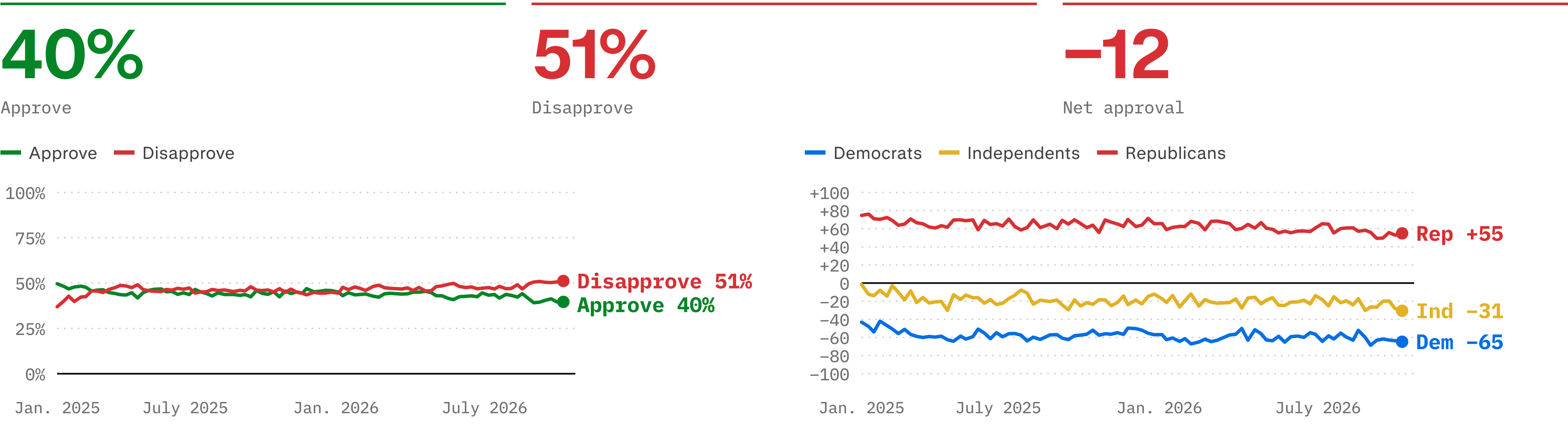
Registered voters • Approve/disapprove at left; net approval by party at right



• 32 The national climate • Trade

Trade approval is underwater, including among independents

Registered voters • Approve/disapprove at left; net approval by party at right



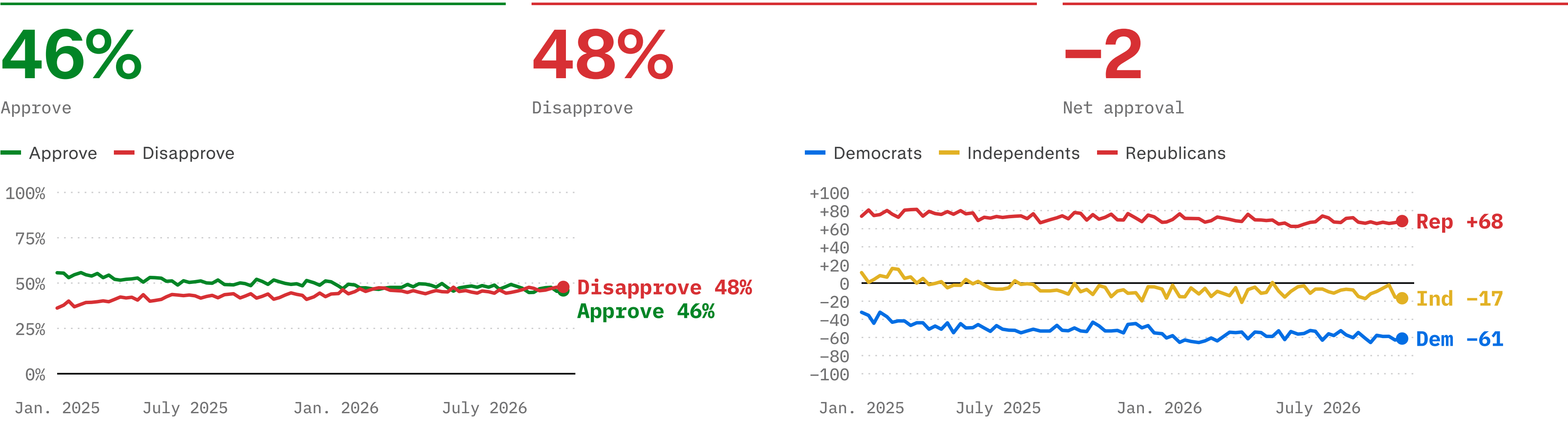
Trump’s trade approval is 40%, against 51% disapproval. His net standing has fallen from 13 points above water in the first post-inauguration reading to 12 points below.

Source: Morning Consult Political Intelligence • Registered voters • Readings dated Oct. 5, 2026

• 33 The national climate • Immigration

Immigration no longer delivers an approval edge

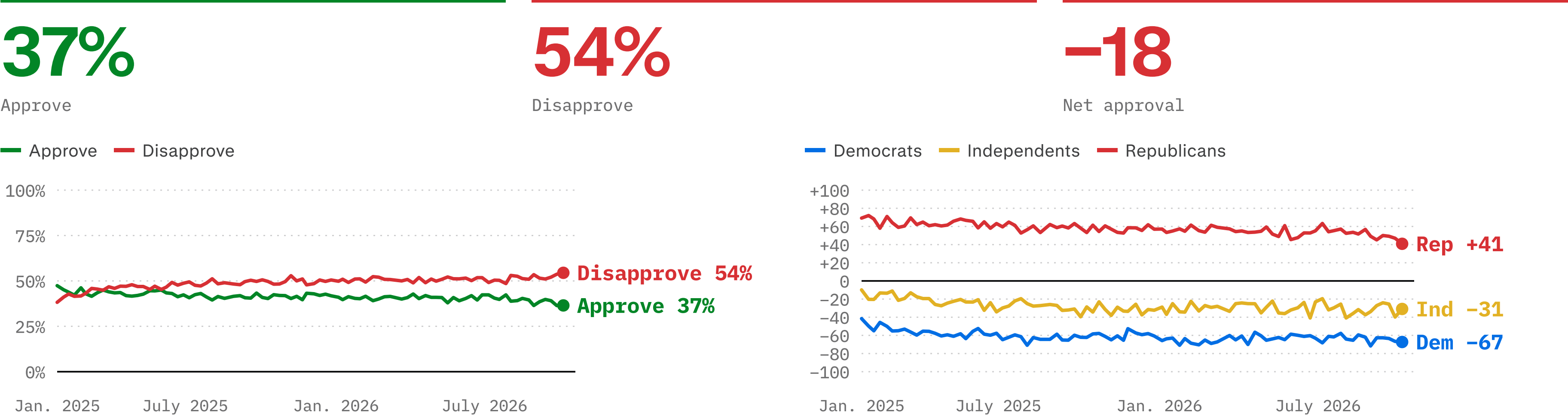
Registered voters • Approve/disapprove at left; net approval by party at right



• 34 The national climate • Health care

Health care combines a trust edge and a focus gap

Registered voters • Approve/disapprove at left; net approval by party at right



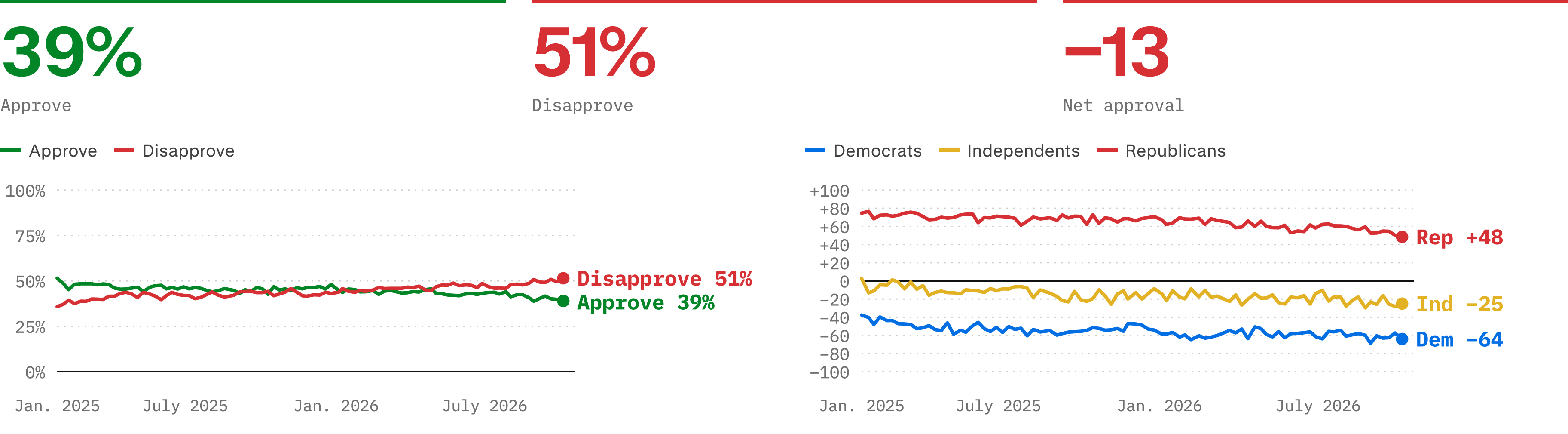
Democrats lead congressional health care trust by 16 points. Voters are also 20 points more likely to say affordable care should be a top priority than to say it is one.

Source: Morning Consult Political Intelligence • Registered voters • Readings dated Oct. 5, 2026

• 35 The national climate • Energy

Cheaper energy is a demand Trump is not meeting

Registered voters • Approve/disapprove at left; net approval by party at right



04

What's ahead

The next Congress. The next decisions for business.

Checks on presidential power

The policy agenda

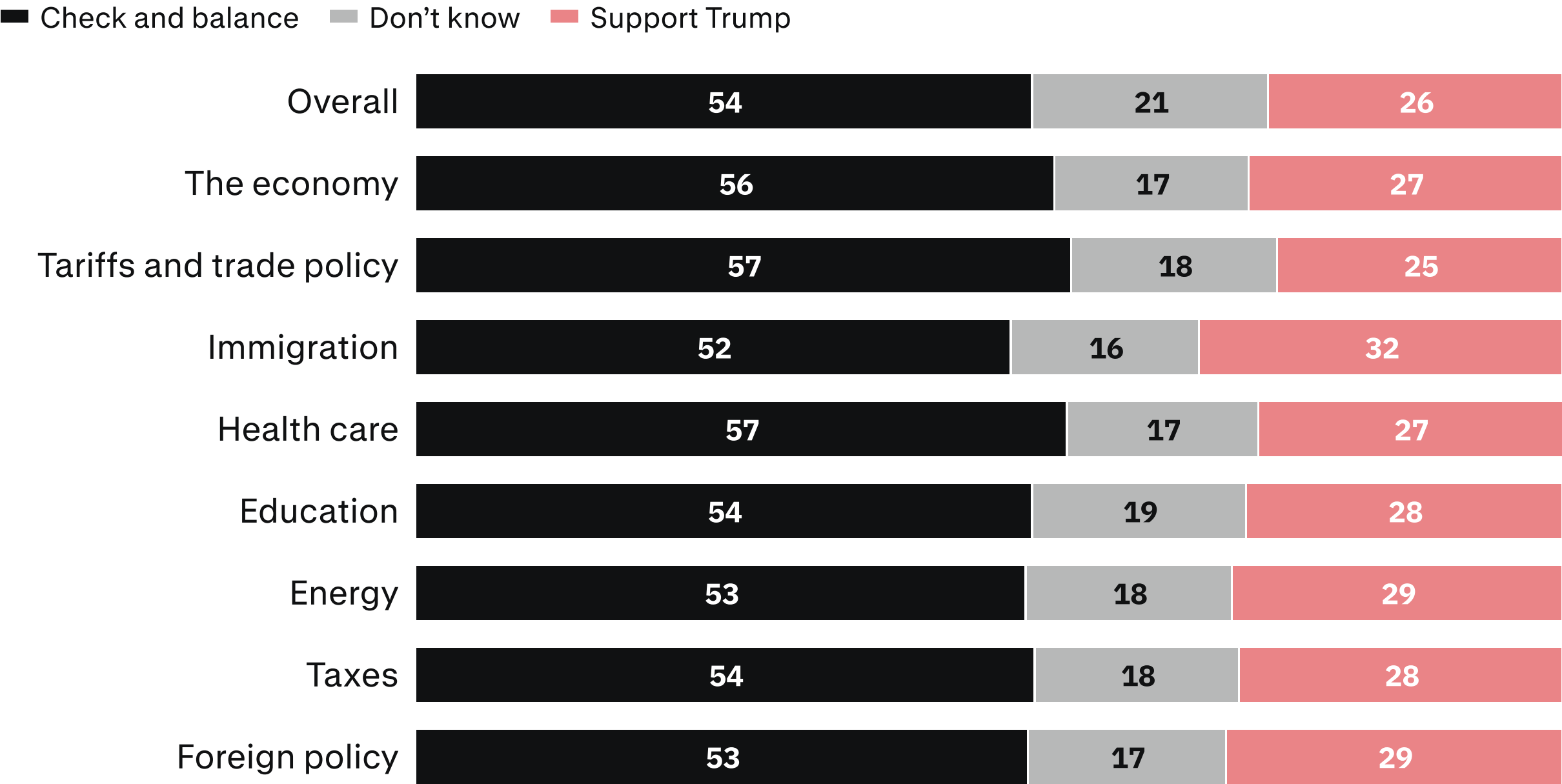
Politics in the workplace



• 37 What’s ahead • The next Congress

Voters want congressional Republicans to check Trump

Preferred focus for Republicans in Congress, percent



The preference crosses the issue list.

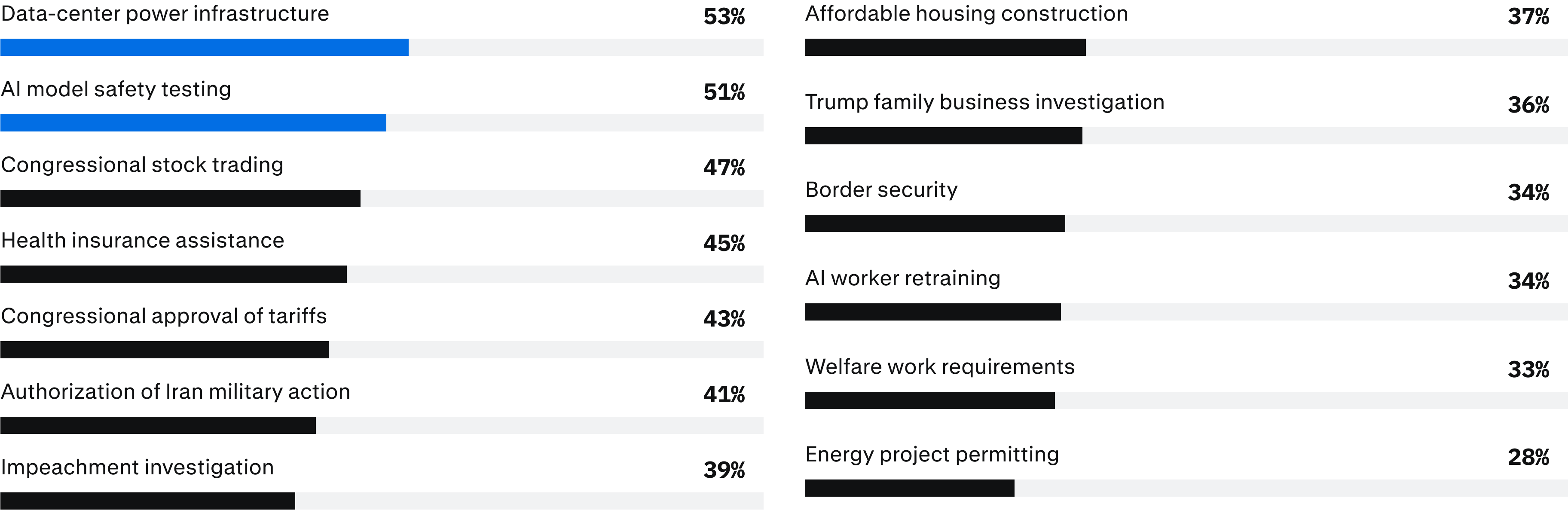
About half of voters favor a check on Trump across all eight measured issues. The overall result is 54% for a check, 26% for supporting his priorities and 21% undecided.

Source: Morning Consult • Registered voters • Sept. 30–Oct. 1, 2026 • n=1,566

• • 38 What’s ahead • The next Congress

AI costs and safety sit high on the next agenda

Share calling each proposed action a top priority • Registered voters



Source: Morning Consult • Registered voters • Sept. 30–Oct. 1, 2026 • n=1,566

-  39 Sources and method

Methodology and sources

The populations, dates and assumptions behind the comparisons

When it was measured

The ballot covers Sept. 28–Oct. 4. Weekly tracker observations are dated Oct. 5. Monthly fieldwork remains Sept. 30–Oct. 1; state approval remains Q3 2026. Cook dates remain Sept. 25 for House, Sept. 23 for Senate and Oct. 1 for governors.

How to read the figures

Historical comparisons use the nearest supplied observation by days before Election Day, with population and timing differences labeled. Seat scenarios hold non-toss-up ratings fixed. Figures are rounded; changes use source precision.

About Eli Yokley and Morning Consult



Eli Yokley

U.S. Politics Analyst

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

corporate power.

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

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

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About Morning Consult

Morning Consult delivers the always-on consumer signal. Every day, we survey 30,000 people across 40+ countries, tracking behavior and sentiment in real time. From hidden growth opportunities to emerging reputation risks, we help leaders see around corners and act first.

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Political Intelligence brings continuous survey research to the political and policy developments shaping the business environment. Repeated measures show how public opinion changes over time; national and state-level views help put that movement in context.



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