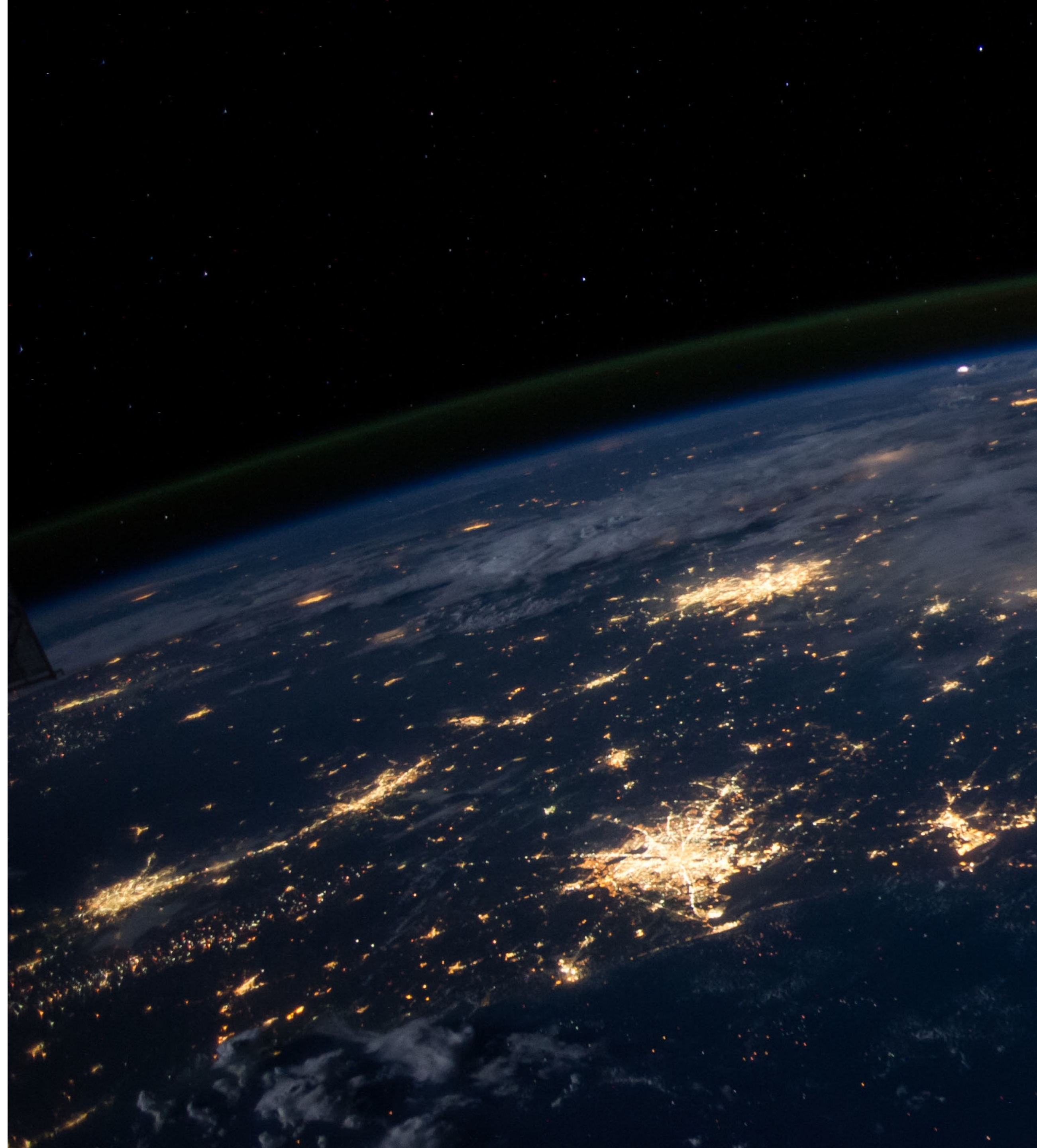




Democratic Primary Update

Verified Voter Omnibus Survey
N=447 Democratic or Democratic Leaning Likely
Primary Voters
December 9 - December 14, 2019



Key Findings

- Joe Biden continues to lead the field of 15 Democratic Presidential candidates tested, **receiving 37 percent support among likely Democratic primary voters**, up from 32 percent support among Democratic voters in October.
 - Among likely Democratic voters with a verified history of voting in primary elections, **Biden earned 40 percent of the vote.**
- Elizabeth Warren and Bernie Sanders are running neck and neck with each earning **14 percent of the vote among likely Democratic primary voters**, a shift from October when Warren led Sanders by 7 points.
- **Mike Bloomberg received 6 percent of the vote among likely voters**, even with **Pete Buttigieg's 6 percent vote share** — unchanged from Buttigieg's 6 percent of the vote in October.
 - Favorability towards Bloomberg and Buttigieg is low compared to other Democratic candidates, and driven by unknowns: **37 percent of likely voters say they have no opinion or have never heard of Bloomberg** and **43 percent say they have no opinion or have never heard of Buttigieg.**
- Biden's lead against top candidates in direct match ups is consistently wide, with **Biden leading Sanders by 26 points, leading Warren by 30 points**, and **leading Buttigieg by 45 points.**
- **Standout demographics:** Whites without college degrees for Biden, Whites with college degrees for Warren, Millennials for Sanders, Whites with college degrees and Moderate and Conservative Democrats for Bloomberg, Rural voters for Buttigieg.

Methodology

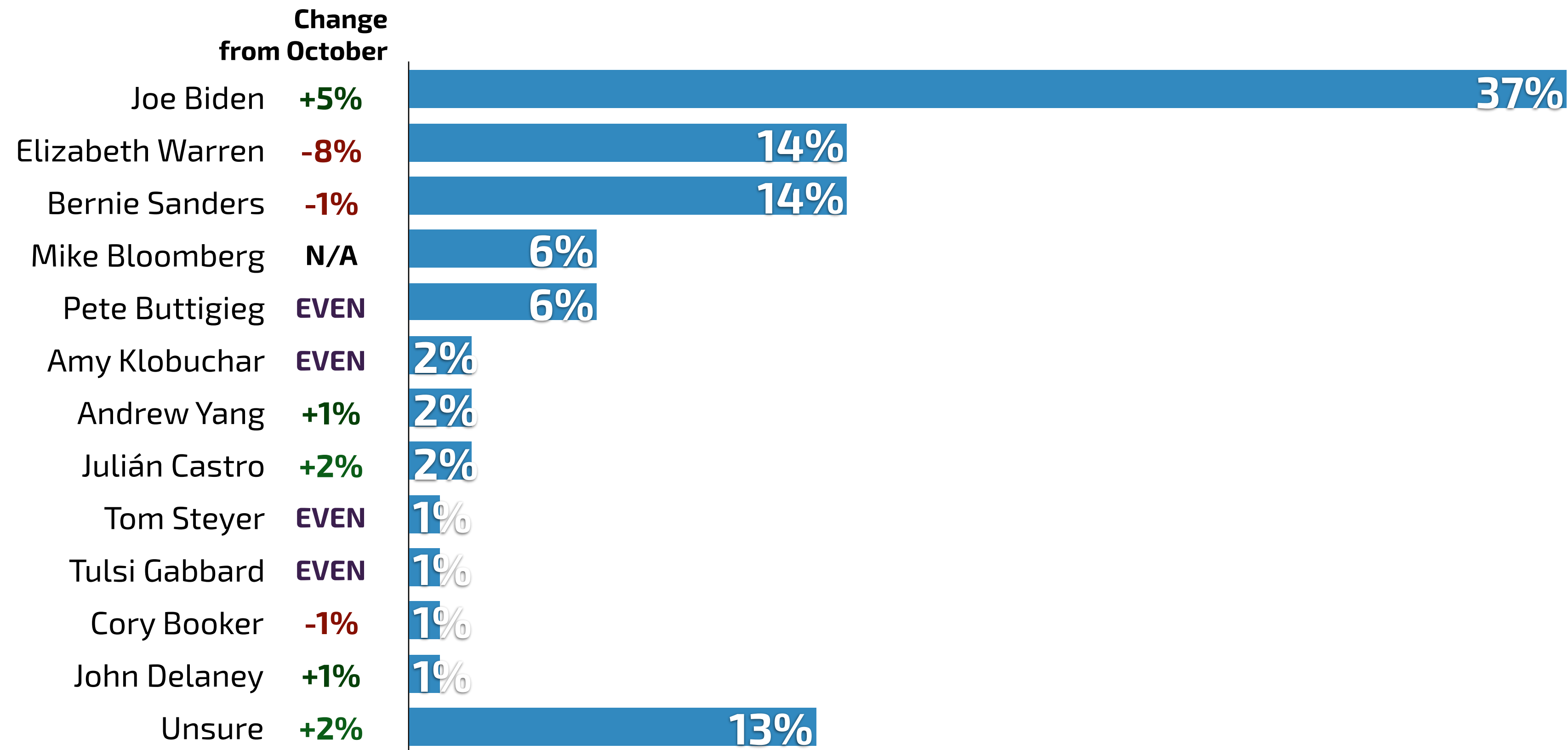
- Using a voter file-matched online panel, we surveyed n=1,006 registered voters across the country from December 9 - December 14, 2019, with a sample of 447 Democratic or Democratic-leaning Independent Likely Voters.
- With our seventh monthly tracking survey of 2019, we were able to track changes in the attitudes and behaviors of key 2020 voters since our last survey of verified Democratic or Democratic-leaning Independent voters from October 21 - October 25, 2019.

The Democratic Primary



Biden, Warren, Sanders At the Top of the Field

Q. If the election were being held today, which candidate would you support for the Democratic nomination for President in 2020? (asked of Democrats & Democratic leaners)

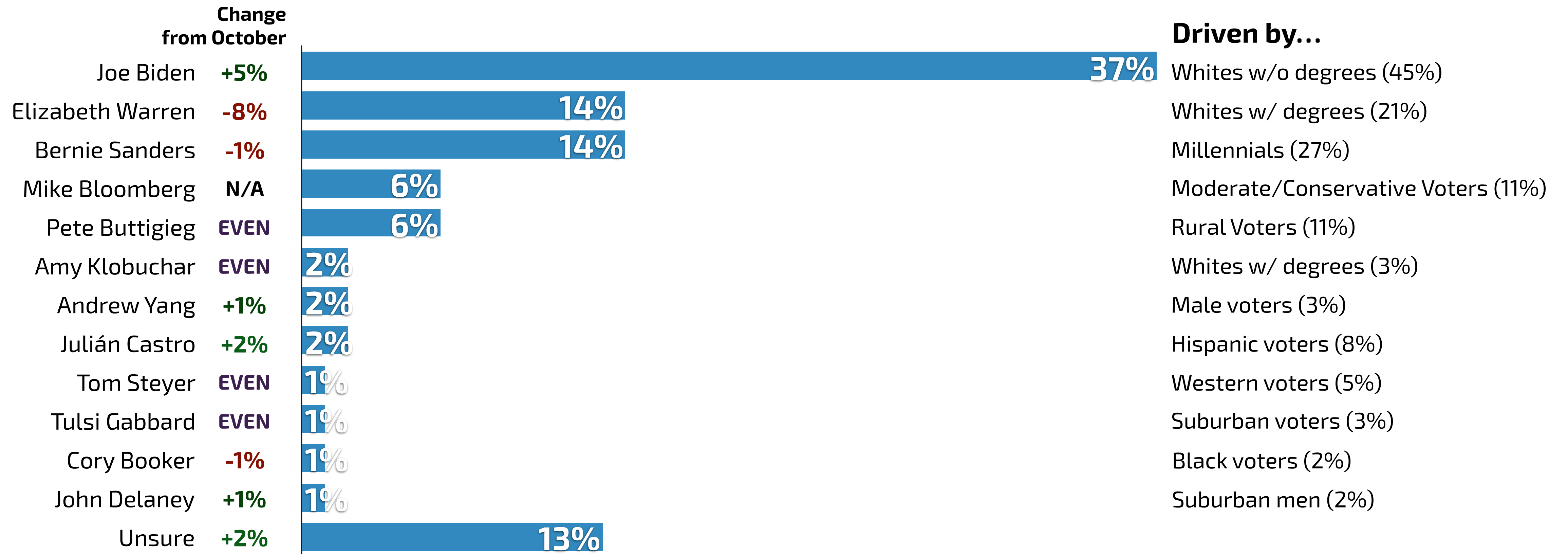


The following candidates were tested but received under 0.5% vote share:

Marianne Williamson
Deval Patrick
Michael Bennet

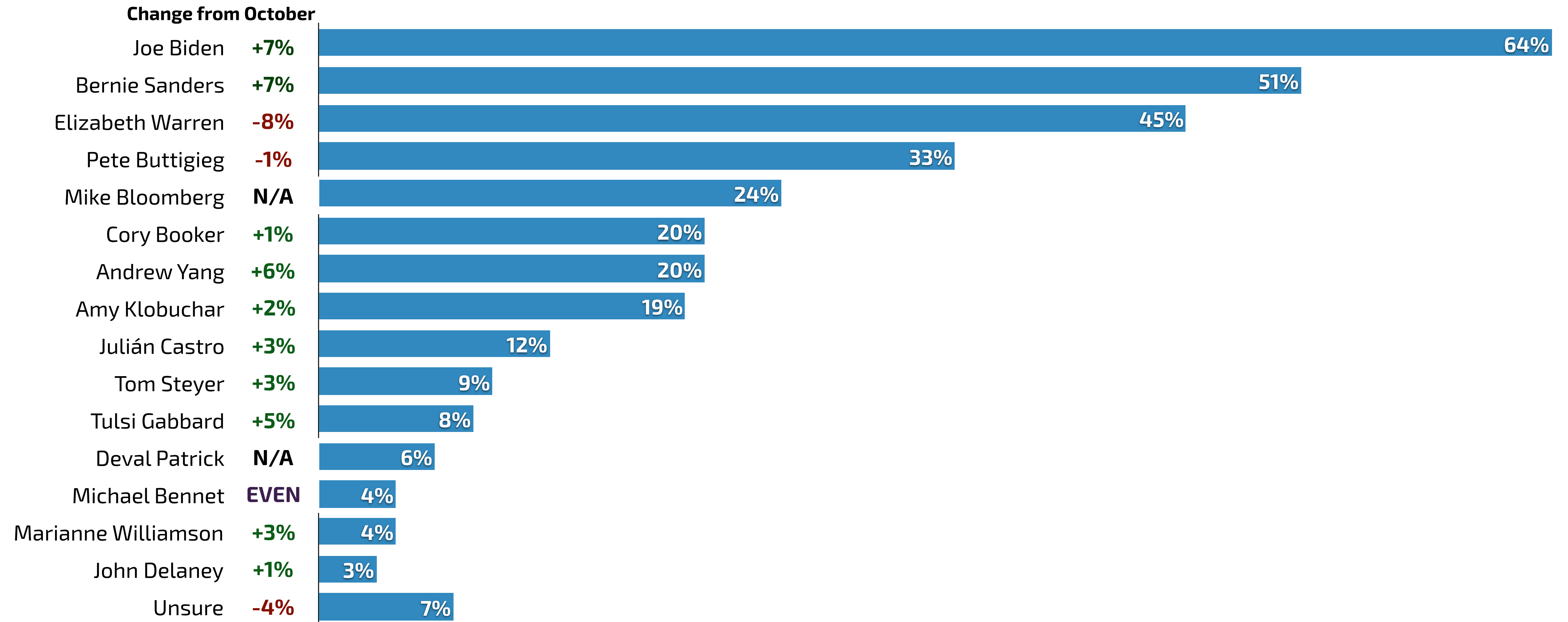
Biden, Warren, Sanders At the Top of the Field

Q. If the election were being held today, which candidate would you support for the Democratic nomination for President in 2020? (asked of Democrats & Democratic leaners)



Biden, Sanders, Warren Have Top Consideration Scores

Q. Which of these candidates would you consider supporting for the Democratic nomination for President in 2020?
Choose as many as you like. (asked of Democrats & Democratic leaners)



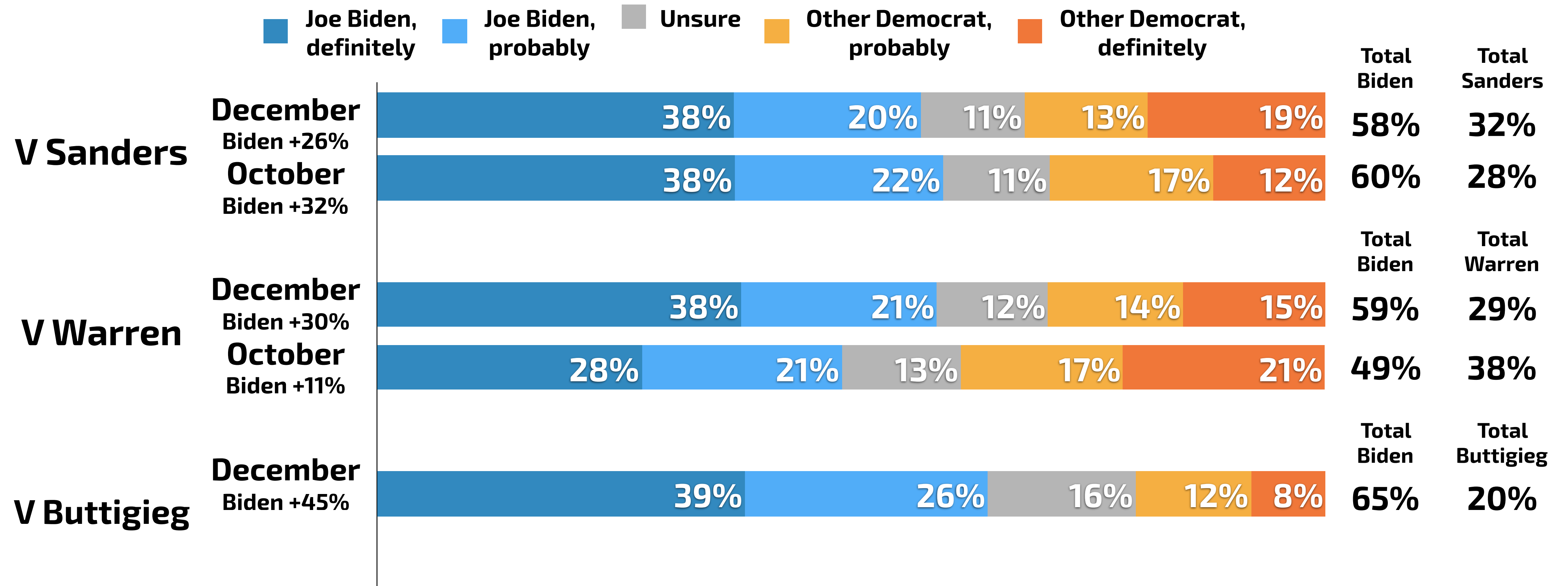
Biden Leads Across All Demographics

Q. If the election were being held today, which candidate would you support for the Democratic nomination for President in 2020? (asked of Democrats & Democratic leaners)

	All Democrats & Democratic-Leaners (N=447) 100% of sample	White Democrats without a Bachelor's Degree (n=139) 31% of sample	White Democrats with a Bachelor's Degree (n=138) 31% of sample	Black Democrats (n=99) 22% of sample
1.	Biden (37%)	1. Biden (44%)	1. Biden (28%)	1. Biden (42%)
2.	Warren (14%)	2. Sanders (15%)	2. Warren (21%)	2. Sanders (16%)
3.	Sanders (14%)	3. Warren (8%)	3. Bloomberg (14%)	3. Warren (14%)
4.	Bloomberg (6%)	4. Buttigieg (6%)	4. Buttigieg (10%)	4. Castro (3%)
5.	Buttigieg (6%)	5. Steuer (4%)	5. Sanders (8%)	5. Booker (2%)

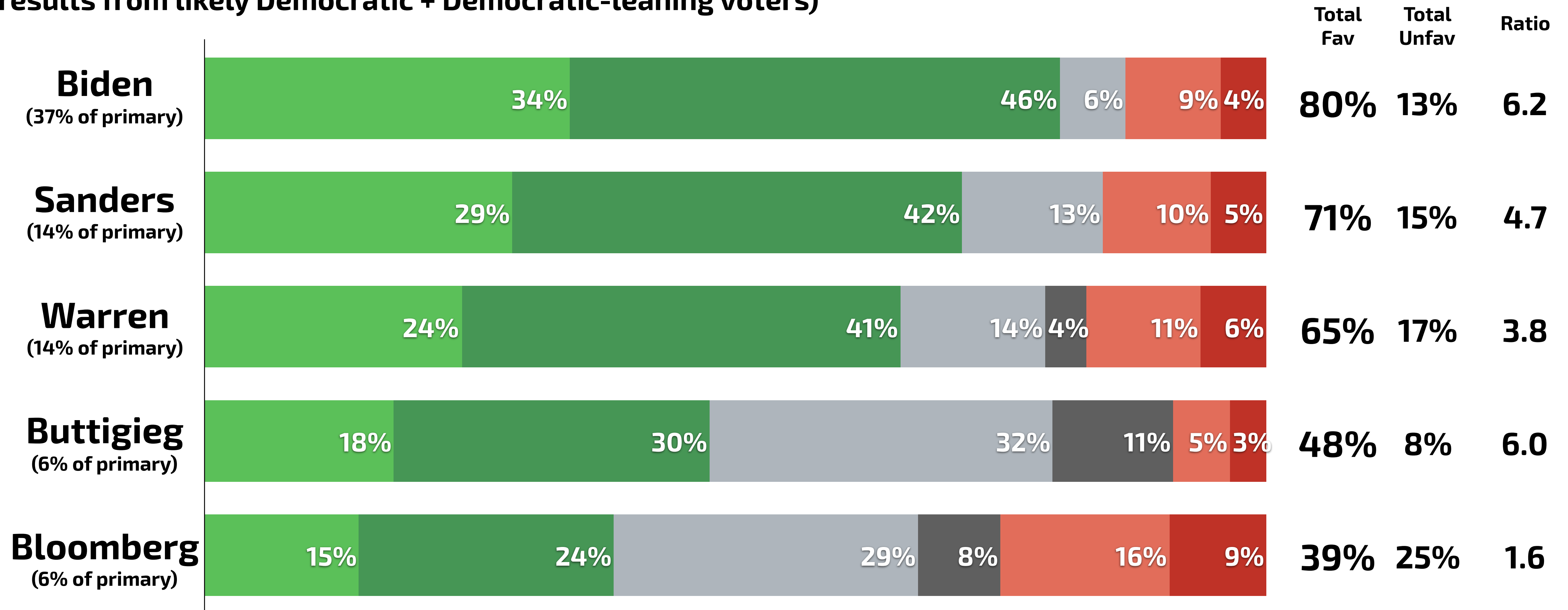
Biden Leads by At Least 25 Points in Direct Match Ups

Q. If the 2020 Democratic presidential primaries were being held today and you had to make a choice between these two candidates, for whom would you vote? (asked of Democrats & Democratic leaners)



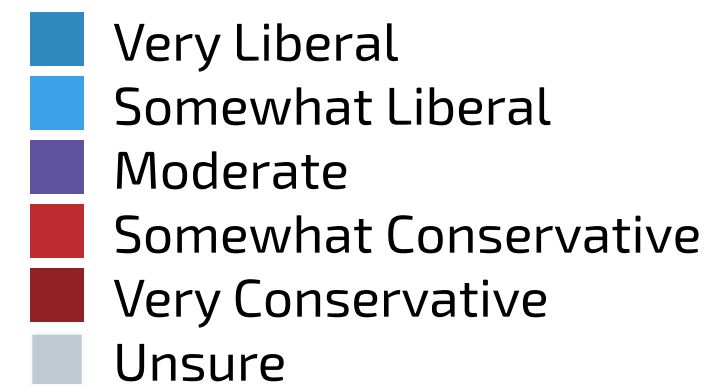
80% of Democratic Voters Have Favorable Opinions of Biden

Q. Do you have a favorable or unfavorable view of the following individuals who have been in the news lately?
(results from likely Democratic + Democratic-leaning voters)



■ Very Favorable
 ■ Somewhat Favorable
 ■ Heard of, no opinion
 ■ Never heard of
 ■ Somewhat Unfavorable
 ■ Very Unfavorable

Likely Democratic Primary Voters Break Down as 57% Liberal, 40% Moderate or Conservative



	Very or Somewhat Liberal Democrats (N=255) 57% of sample		Moderate or Conservative Democrats (N=177) 40% of sample							
Primary First Choice	1. Biden (30%)	2. Warren (21%)	3. Sanders (17%)	4. Buttigieg (8%)	5. Bloomberg (3%)	1. Biden (47%)	2. Sanders (11%)	3. Bloomberg (11%)	4. Warren (6%)	5. Castro (3%)
Race	71% White 29% Non-White					52% White 48% Non-White				
Age	33% 18-44 67% Over 45					35% 18-44 65% Over 45				
Education	45% with a college degree 55% without a college degree					39% with a college degree 61% without a college degree				

Overall Vote Choice

Q. If the election were being held today, which candidate would you support for the Democratic nomination for President in 2020? (asked of Democrats & Democratic leaners)

	All Democrats & Democratic-Leaners (N=447) 100% of sample	With '16/'18 Primary Vote History (N=239) 53% of sample	Without '16/'18 Primary Vote History (N=208) 46% of sample	Liberals (N=255) 57% of sample	Moderates & Conservatives (N=177) 40% of sample	18-44 Years Old (N=149) 33% of sample	45 and Older (N=298) 66% of sample
Biden	37%	40%	33%	30%	47%	27%	42%
Warren	14%	15%	14%	21%	6%	23%	10%
Sanders	14%	8%	21%	17%	11%	25%	8%
Bloomberg	6%	8%	4%	3%	11%	2%	8%
Buttigieg	6%	7%	4%	8%	2%	5%	6%



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