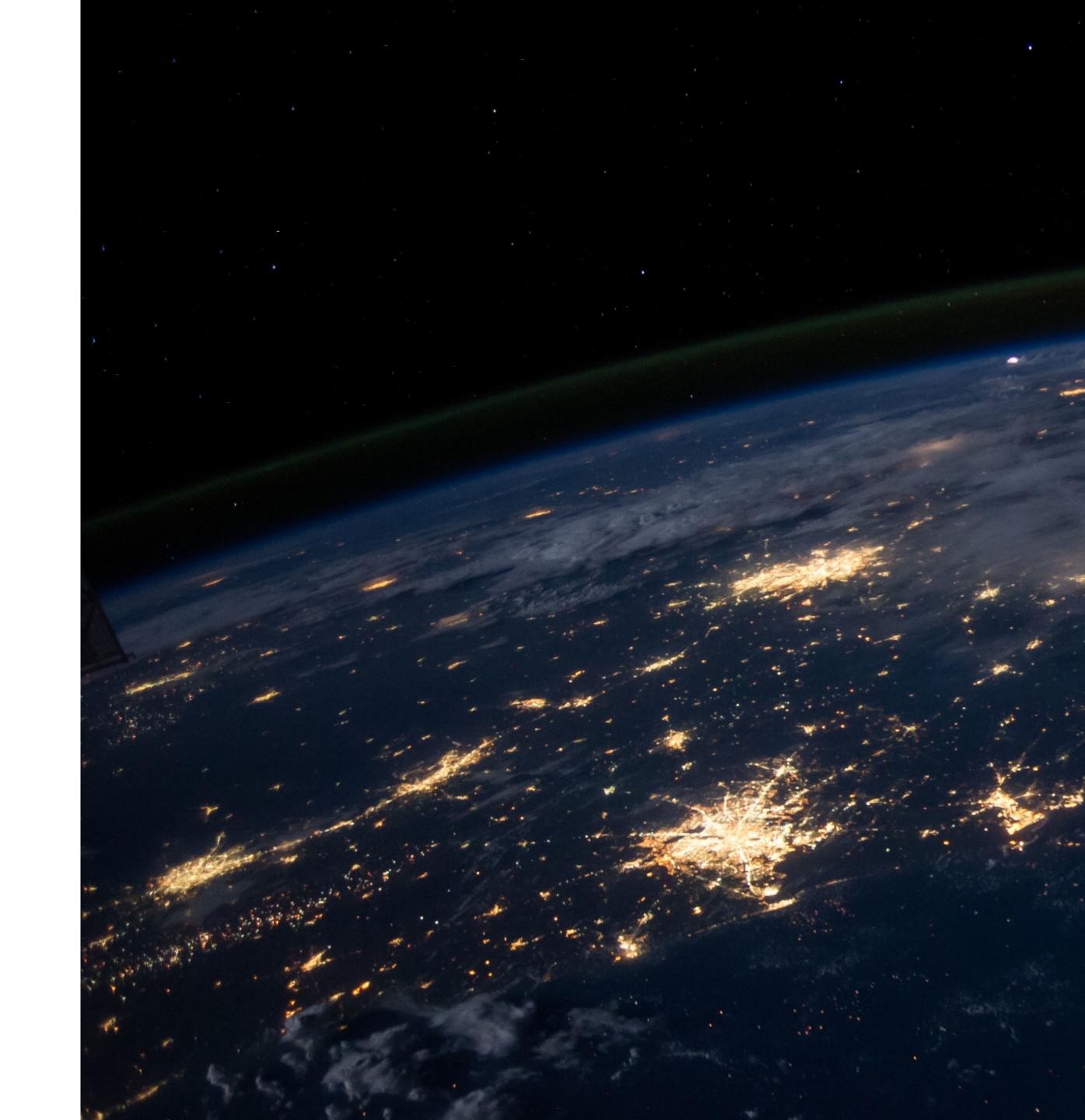


Democratic Primary Update

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



Key Findings

- **Democratic primary voters,** up from 32 percent support among Democratic voters in October.
- **Democratic primary voters,** a shift from October when Warren led Sanders by 7 points.
- unchanged from Buttigieg's 6 percent of the vote in October.
 - opinion or have never heard of Buttigieg.
- Warren by 30 points, and leading Buttigieg by 45 points.
- •



Joe Biden continues to lead the field of 15 Democratic Presidential candidates tested, receiving 37 percent support among likely

• 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**

• Mike Bloomberg received 6 percent of the vote among likely voters, even with Pete Buttigieg's 6 percent vote share —

• 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

Biden's lead against top candidates in direct match ups is consistently wide, with **Biden leading Sanders by 26 points, leading**

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

- Voters.
- from October 21 October 25, 2019.



• 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

• 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



The Democratic Primary







Biden, Warren, Sanders At the Top of the Field

14%

14%

13%

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)

from	L	
Joe Biden	+5%	
Elizabeth Warren	-8%	
Bernie Sanders	-1%	
Mike Bloomberg	N/A	6%
Pete Buttigieg	EVEN	6%
Amy Klobuchar	EVEN	2%
Andrew Yang	+1%	2%
Julián Castro	+2%	2%
Tom Steyer	EVEN	1%
Tulsi Gabbard	EVEN	1%
Cory Booker	-1%	1%
John Delaney	+1%	1%
Unsure	+2%	





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

14%

14%

13%

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Julián Castro	+2%	2%
Tom Steyer	EVEN	1%
Tulsi Gabbard	EVEN	1%
Cory Booker	-1%	1%
John Delaney	+1%	1%
Unsure	+2%	



Driven by...

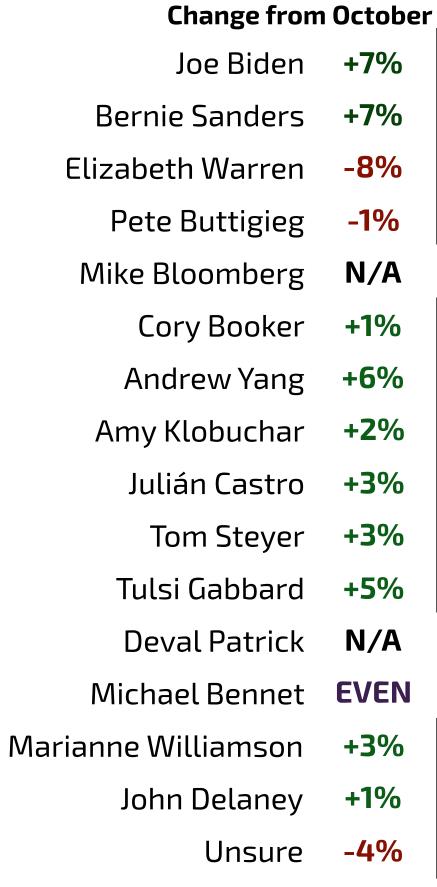
37% Whites w/o degrees (45%) Whites w/ degrees (21%) Millennials (27%) Moderate/Conservative Voters (11%) Rural Voters (11%) Whites w/ degrees (3%) Male voters (3%) Hispanic voters (8%) Western voters (5%) Suburban voters (3%) Black voters (2%) Suburban men (2%)



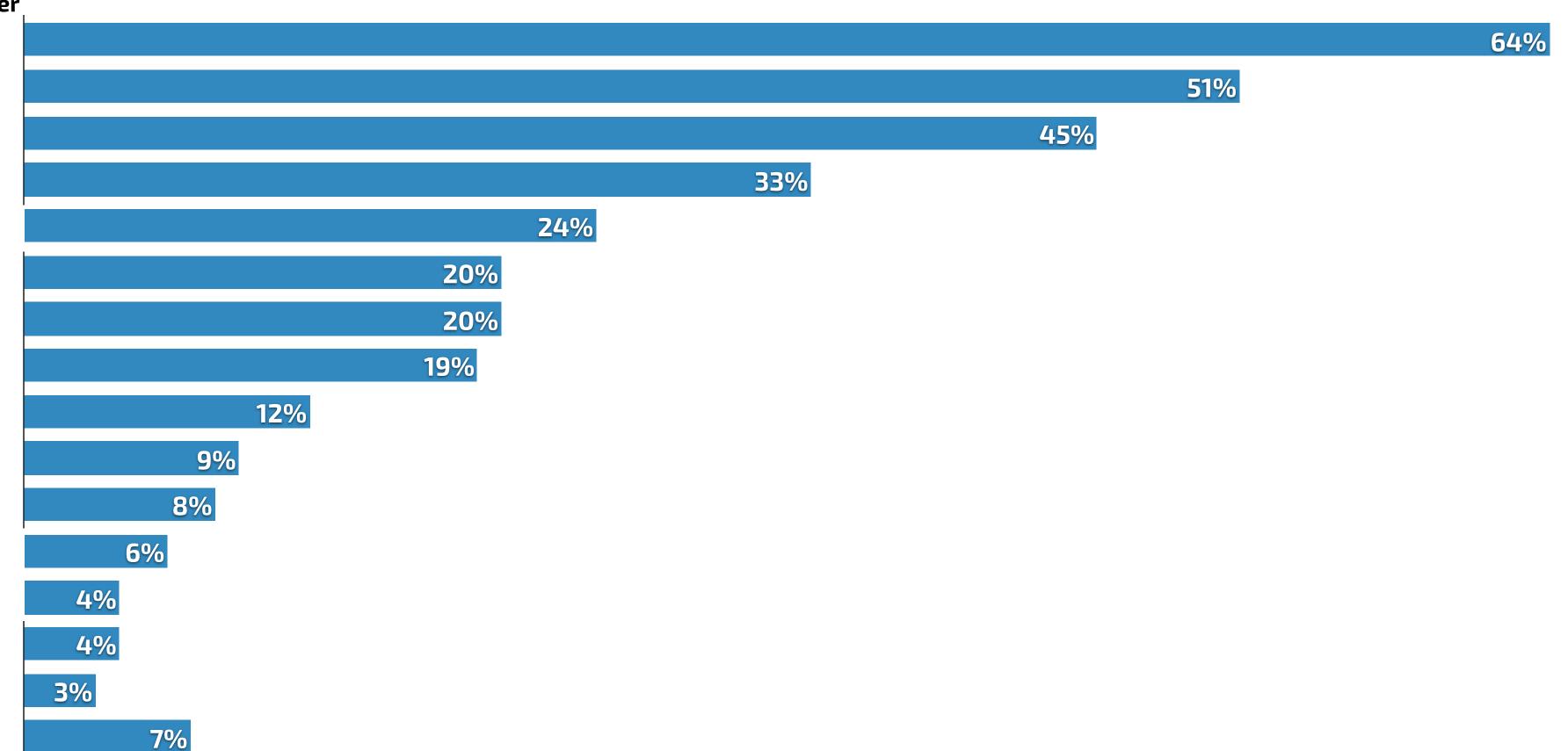


Biden, Sanders, Warren Have Top Consideration Scores

Choose as many as you like. (asked of Democrats & Democratic leaners)







Q. Which of these candidates would you consider supporting for the Democratic nomination for President in 2020?





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)

Demo	All ocrats & Democratic-Leaners	5 VV	White Democrats ithout a Bachelor's Degree		White Democrats with a Bachelor's Degree		Black Democrats
	(N=447) 100% of sample		(n=139) 31% of sample		(n=138) 31% of sample		(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.	Steyer (4%)	5.	Sanders (8%)	5.	Booker (2%)



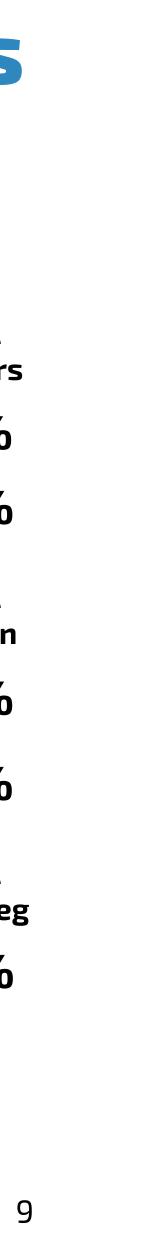


Biden Leads by At Least 25 Points in Direct Match Ups

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)

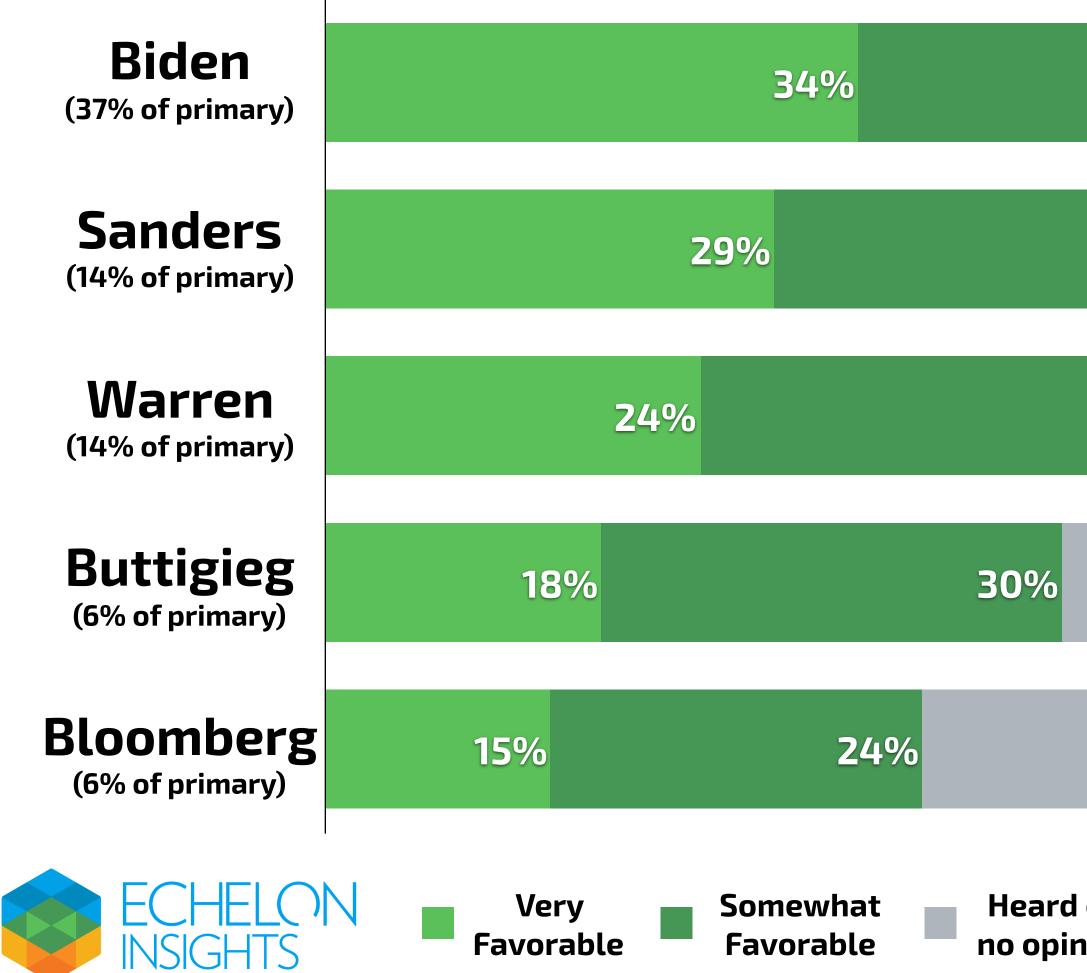
	Joe Bid definit	•	loe Biden, probably	Unsure	Oth	ner Demoo probably	•		emocrat, itely		Total Biden	Total Sanders
	December Biden +26%			38%		20%	11%	13%		19%	58%	32%
V Sanders	October Biden +32%			38%		22%	11%		17%	12%	60%	28%
											Total Biden	Total Warren
V Warren	December Biden +30% October Biden +11%			38%		21%	12%	14	%	15%	59%	29%
			28%	6	21%	13%	6	17%		21%	49%	38%
V Buttigieg	December										Total Biden	Total Buttigieg
	December Biden +45%			39%		28	<mark>5%</mark>	16%	12%	8%	65%	20%





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)



vote	15)				Total Fav	Total Unfav	Ratio
		46% 69	% 9%	6 <mark>4%</mark> 8	30%	13%	6.2
	42%	13%	10%	5%	71%	15%	4.7
	41%	14% 4%	11%	6%	55%	17%	3.8
		32%	11% 59	% 3% 2	4 8%	8%	6.0
	29%	8%	16%	9%	39%	25%	1.6
l of, nion	Never heard of	Somewhat Unfavorable		/ery vorable			1



10

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

 Very Liberal Somewhat Liberal Moderate Somewhat Conservative 	Ideology	28%	29%	33% <mark>4% 2%</mark> 3
 Very Conservative Unsure 		Very or Somewhat Liberal Democrats (N=255) 57% of sample		Moderate or Conservative Democrats (N=177) 40% of sample
Primary First Cl	1. 2. 3. 4. 5.	Biden (30%) Warren (21%) Sanders (17%) Buttigieg (8%) Bloomberg (3%)	1. 2. 3. 4. 5.	Biden (47%) Sanders (11%) Bloomberg (11%) Warren (6%) 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

President in 2020? (asked of Democrats & Democratic leaners)

	All Democrats & Democratic-Leaners	With '16/'18 Primary Vote History	Without '16/'18 Primary Vote History	Liberals	Moderates & Conservatives	18-44 Years Old	45 and Older
	(N=447) 100% of sample	(N=239) 53% of sample	(N=208) 46% of sample	(N=255) 57% of sample	(N=177) 40% of sample	(N=149) 33% of sample	(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%



Q. If the election were being held today, which candidate would you support for the Democratic nomination for







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