

Democratic Primary Update

Verified Voter Omnibus Survey N=474 Democratic or Democratic Leaning Likely Primary Voters January 20 - January 23, 2020



Key Findings

- points to 23% of the likely Democratic vote.
 - received 26% of the vote to Sanders' 22%.
- of the likely Democratic vote.
- - Biden led Sanders 54-38 in a direct match up this month and led Buttigieg 56-32. •



Joe Biden and Bernie Sanders are leading the field with a 3 point margin between the two candidates: Biden fell 11 points since December to 26% of the likely Democratic vote and Sanders gained 9

• Among likely Democratic voters with a verified history of voting in primary elections, Biden

Mike Bloomberg also showed strong momentum since December, with **Bloomberg gaining 7 points** to 13% of the likely Democratic vote. Elizabeth Warren earned 10% and Pete Buttigieg earned 7%

Biden's lead against top candidates in direct match ups narrowed across the board since December, and narrowed most significantly against Warren, where Biden led 48-43, from 59-29 in December.



Methodology

- Voters.
- since our last survey of verified Democratic or Democratic-leaning Independent Likely Voters from December 9 - December 14, 2019



• Using a voter file-matched online panel, we surveyed n=1,000 registered voters across the country from January 20 - January 23, 2019, with a sample of 474 Democratic or Democratic-leaning Independent Likely

• With our eight monthly tracking survey on the 2020 political landscape, we were able to track changes in the attitudes and behaviors of key voters



The Democratic Primary







Biden, Sanders Neck & Neck, Bloomberg at 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)

Change from December

Joe Biden	-11%
Bernie Sanders	+9%
Mike Bloomberg	+7%
Elizabeth Warren	-4%
Pete Buttigieg	+1%
Amy Klobuchar	+1%
Andrew Yang	+1%
Michael Bennet	+2%
Tom Steyer	+1%
Tulsi Gabbard	EVEN
Unsure	-3%





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

> **Deval Patrick** John Delaney



5

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Driven by...

Whites w/o Bachelor's Degrees (32%)

Millennials (32%)

Boomers (19%)

Whites with Bachelor's Degrees (14%)

Suburban Voters (11%)

Voters in the Midwest (8%)

Male Voters (4%)

Urban Voters (5%)

Voters in their 30s (3%)

Voters in the West (2%)











Biden, Warren, Sanders 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)

from De	Change ecember	1		
Joe Biden	-8%			
Elizabeth Warren	+3%			
Bernie Sanders	-4%			
Mike Bloomberg	+16%			
Pete Buttigieg	-3%			
Andrew Yang	+2%			22
Amy Klobuchar	+1%			20%
Tom Steyer	+5%		14%	
Tulsi Gabbard	-2%	6%		
Deval Patrick	-1%	5%		
Michael Bennet	+1%	5%		
John Delaney	+1%	4%		
Unsure	- 2 %	5%		









Biden and Sanders Lead Across 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)

De	All mocrats & Democratic-Leaners	5 V	White Democrats vithout a Bachelor's Degree		White Democrats with a Bachelor's Degree		Black Democrats
	(N=474) 100% of sample		(n=132) 28% of sample		(n=158) 33% of sample		(n=100) 21% of sample
1.	Biden (26%)	1.	Biden (32%)	1.	Sanders (21%)	1.	Sanders (32%)
2.	Sanders (23%)	2.	Sanders (21%)	2.	Biden (18%)	2.	Biden (28%)
3.	Bloomberg (13%)	3.	Bloomberg (16%)	3.	Bloomberg (15%)	3.	Bloomberg (11%)
4.	Warren (10%)	4.	Buttigieg (10%)	4.	Warren (14%)	4.	Bennet (8%)
5.	Buttigieg (7%)	5.	Warren (7%)	5.	Buttigieg (10%)	5.	Warren (5%)





Biden's Lead in Direct Match Ups Narrows Across the Board

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)





		mocrat,		0	mocrat,		Ot	sure
Total Total Biden Warrer		itely	definit		ably	prob		
48% 43%	26%			17%	0	9%	20%	
59% 29%	15%	%	14%	2%	<mark>%</mark> 1	21		8%
Total Total Biden Sander								
54% 38%	26%			13%	8%	24%	2	
58% 32%	19%		13%	%	<mark>ó</mark> 11	20%		8%
Total Total Biden Buttigie								
56% 32%	17%)	15%	%	12	26%		
65% 20%	8%	12%	6%	1	26%			9%



Top Candidates Have Net Positive Favorability Among Democrats

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)



voters	,				Total Fav	Total Unfav	Ratio
	46%	7%	14%	7%	72%	21%	3.44
	38%	10%	14%	5%	71%	19%	3.64
	43%	16% 2%	5 10%	6%	66%	16%	4.09
41	%	23% 29	⁄o 11%	6 4%	59%	15%	3.85
40%		25%	8% 6%	6 4%	57%	10%	5.43
l of, nion	Never heard of	Somewhat Unfavorable		ery /orable			-



Likely Democratic Primary Voters Break Down as 54% Liberal, 45% Moderate or Conservative

 Very Liberal Somewhat Liberal Moderate 	Ideology	26%	29%	37% 69	<mark>%</mark> 2
Somewhat Conservative Very Conservative Unsure		Very or Somewhat Liberal Democrats (N=258) 54% of sample		Moderate or Conservative Democrats (N=212) 45% of sample	
Primary First Ch	1. 2. 3. 4. 5.	Sanders (27%) Biden (27%) Warren (12%) Buttigieg (10%) Bloomberg (8%)	1. 2. 3. 4. 5.	Biden (23%) Bloomberg (20%) Sanders (17%) Warren (8%) Buttigieg (4%)	
Race		63% White 37% Non-White		60% White 40% Non-White	
Age		43% 18-44 57% Over 45		31% 18-44 69% Over 45	
Education		47% with a college degree 53% without a college degree		46% with a college degree 54% 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=474) 100% of sample	(N=333) 70% of sample	(N=141) 30% of sample	(N=258) 54% of sample	(N=212) 45% of sample	(N=178) 38% of sample	(N=296) 62% of sample
Biden	26%	26%	25%	27%	23%	22%	28%
Sanders	23%	22%	26%	27%	17%	36%	15%
Bloomberg	13%	13%	14%	8%	20%	8%	16%
Warren	10%	12%	6%	12%	8%	11%	10%
Buttigieg	7%	7%	7%	10%	4%	7%	8%



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







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