

Shifting Democratic Lines

Verified Voter Omnibus Survey N=510 Democrats or Democratic leaners July 23 - July 27, 2019



Key Findings

- Joe Biden's lead among 25 announced Democratic candidates remains relatively constant, with 33% of the Democratic vote.
- points under Bernie Sanders' 14% of the Democratic vote, and relatively even with Elizabeth Warren's 10% of the Democratic vote.
- the most striking movement.
 - In May, Biden held a 47 point advantage against Warren in a head to head match-up; today, Biden leads Warren by just 19 points.
 - Similarly, in May, Biden led Harris in a head to head match-up by 43 points, and now **Biden leads Harris by 23 points.**
 - Biden's 36 point lead against Sanders in May.
- Candidate preferences are driven by voters' backgrounds.
 - college degrees favor Sanders and Buttigieg.
 - Black Democrats show strong support for Biden, Sanders and Harris.
 - voting in primary elections than among Democrats without a primary vote history.



• The most dramatic shift in support from June was driven by Kamala Harris, who secured a 5 point gain to 11% of the Democratic vote, or 3

Biden's lead in head to head match-ups against top candidates narrowed dramatically over the last two months, with Warren and Harris showing

• Sanders currently shows the widest margin against Biden out of the three candidates tested, with **Biden leading Sanders by 29 points**, after

• While Biden generally leads among most demographic groups, college educated Whites favor Warren and Harris, while Whites without

Biden's performance slips among Democratic primary voters, with **Biden performing worse among Democrats with a verified history of**



Methodology

- Democrats or Democratic-leaning Independents.
- With our third monthly tracking survey of 2019, we were able to track from June 22 to June 25, 2019.



• Using a voter file-matched online panel, we surveyed n=1,026 registered voters across the country from July 23 to July 27, 2019, with a sample of 510

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







Democratic Interest in the Debates is Slightly Lower

Q. Do you plan on watching the Democratic presidential debates next week or any news coverage of them? (asked of Democrats & Democratic leaners)





46%	26%	17%	10%
50%	23%	14%	13%



Harris Up By 5 Points Since June

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)

fr	Change om June	
Joe Biden	+1%	
Bernie Sanders	-1%	14%
Kamala Harris	+5%	11%
Elizabeth Warren	-1%	10%
Pete Buttigieg	-4%	5%
Beto O'Rourke	0%	3%
Tulsi Gabbard	+2%	2%
Cory Booker	-1%	1%
Julián Castro	+1%	1%
Steve Bullock	+1%	1%
Kirsten Gillibrand	0%	1%
Andrew Yang	-1%	1%
Others	+1%	2%
Unsure	-3%	16%





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

Marianne Williamson Michael Bennet John Delaney Jay Inslee Bill de Blasio Joe Sestak Tim Ryan Mike Gravel Amy Klobuchar John Hickenlooper Seth Moulton Tom Steyer Wayne Messam





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	Driven by
33%	Seniors (39%)
	Millennials (28%)
	Black Voters (15%)
	Whites with Bachelor's Degrees (22%)
	White Voters (9%)
	Suburban Voters (5%)
	Voters with a Bachelor's Degree (5%)
	Black Voters (2%)
	Western Voters (4%)
	Men (2%)
	Whites with Bachelor's Degrees (2%)
	Western Voters (2%)



Democratic Voters are Open to a Wide Group of Candidates

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?



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Differences in Race, Education Drive 2020 Picks

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)

D	All emocrats & Democratic-Leaners		White Democrats without a Bachelor's Degree	Whites Democrats with a Bachelor's Degree			Black Democrats
	(N=510) 100% of sample		(n=155) 30% of sample		(n=139) 27% of sample		(n=117) 23% of sample
1.	Biden (33%)	1.	Biden (34%)	1.	Biden (26%)	1.	Biden (42%)
2.	Sanders (14%)	2.	Sanders (11%)	2.	Warren (22%)	2.	Sanders (18%)
3.	Harris (11%)	3.	Buttigieg (8%)	3.	Harris (16%)	3.	Harris (15%)
4.	Warren (10%)	4.	Warren (7%)	4.	Buttigieg (9%)	4.	O'Rourke (4%)
5.	Buttigieg (5%)	5.	Harris (6%)	5.	Sanders (8%)	5.	Warren (3%)
6.	O'Rourke (3%)	6.	O'Rourke (4%)	6.	Gabbard (4%)	6.	Booker (2%)







Warren Shows Strongest Advantage Against Biden

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)



sure	Other Der proba	•	Other Den definit	-		Total Biden	Total Warren
6	20%	10%	13%		22%	54%	35%
40%		25%	15%	12%	7%	66%	19%
						Total Biden	Total Harris
6	21%	11%	16%		17%	56%	33%
%	Z	26%	17%	11%	9%	63%	20%
						Total Biden	Total Sanders
6	249	<mark>% 12</mark> %	6 11%		19%	58%	29%
9%	22	2% 1	4% 10 %	0	14%	61%	25%



Biden Continues to Lead in 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 Democratic + Democratic-leaning voters)





Democrats Break Down as 58% Liberal, 41% Moderate or Conservative

 Very Liberal Somewhat Liberal Moderate Somewhat Conservative 	Ideology	30%	28%	<mark>% 4% 2</mark>
Very ConservativeUnsure		Very or Somewhat Liberal Democrats	Moderate or Conservative Democrats	
		(N=296) 58% of sample	(N=210) 41% of sample	
Primary First Cl	ıoice	1. Joe Biden (30%) 2. Elizabeth Warren (16%) 3. Bernie Sanders (14%) 4. Kamala Harris (11%) 5. Pete Buttigieg (6%)	1. Joe Biden (36%) 2. Kamala Harris (12%) 3. Bernie Sanders (12%) 4. Pete Buttigieg (4%) 5. Beto O'Rourke (3%)	
Race		64% White 36% Non-White	50% White 50% Non-White	
Age		53% 18-44 47% Over 45	43% 18-44 57% Over 45	
Education		47% with a college degree 53% without a college degree	30% with a college degree 70% without a college degree	
ECHELON INSIGHTS				1.

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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	With '16/'18 Primary Vote History	Without '16/'18 Primary Vote History	Liberals	Moderates & Conservatives	18-44 Years Old	45 and Older
	(N=510) 100% of sample	(N=223) 44% of sample	(N=286) 56% of sample	(N= 296) 58% of sample	(N= 210) 41% of sample	(N= 249) 49% of sample	(N= 261) 51% of sample
Biden	33%	27%	37%	30%	36%	24%	41%
Sanders	14%	15%	13%	14%	12%	23%	4%
Harris	11%	14%	10%	11%	12%	8%	15%
Warren	10%	11%	10%	16%	3%	13%	8%
Buttigieg	5%	8%	3%	6%	4%	5%	5%
O'Rourke	3%	3%	3%	3%	3%	3%	4%









