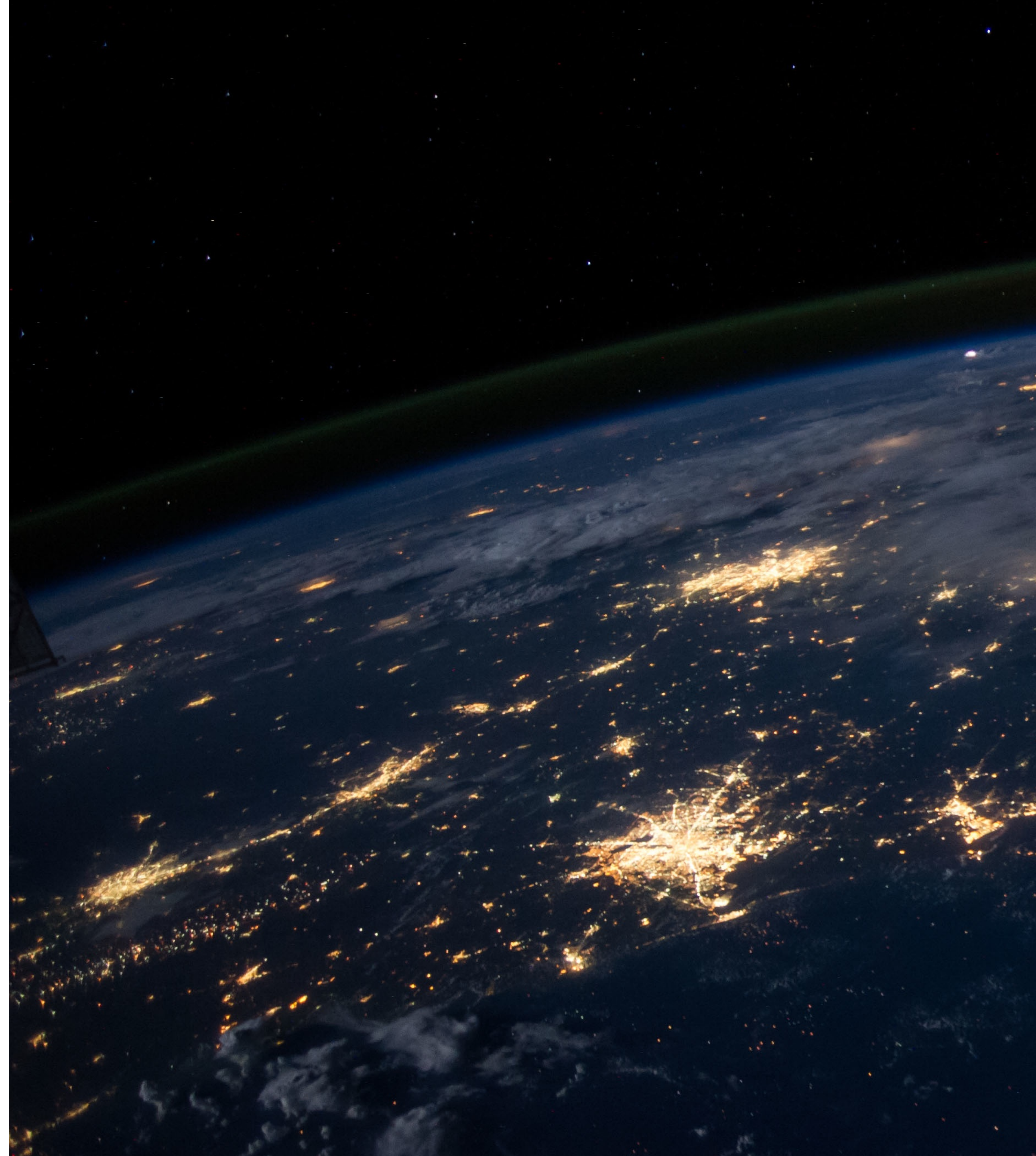




Shifting Democratic Lines

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**.
- 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 points under **Bernie Sanders' 14% of the Democratic vote**, and relatively even with **Elizabeth Warren's 10% of the Democratic vote**.
- Biden's lead in head to head match-ups against top candidates narrowed dramatically over the last two months, with Warren and Harris showing 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**.
 - Sanders currently shows the widest margin against Biden out of the three candidates tested, with **Biden leading Sanders by 29 points**, after Biden's 36 point lead against Sanders in May.
- Candidate preferences are driven by voters' backgrounds.
 - While Biden generally leads among most demographic groups, **college educated Whites favor Warren and Harris**, while **Whites without college degrees favor Sanders and Buttigieg**.
 - **Black Democrats show strong support for Biden, Sanders and Harris**.
 - Biden's performance slips among Democratic primary voters, with **Biden performing worse among Democrats with a verified history of voting in primary elections than among Democrats without a primary vote history**.

Methodology

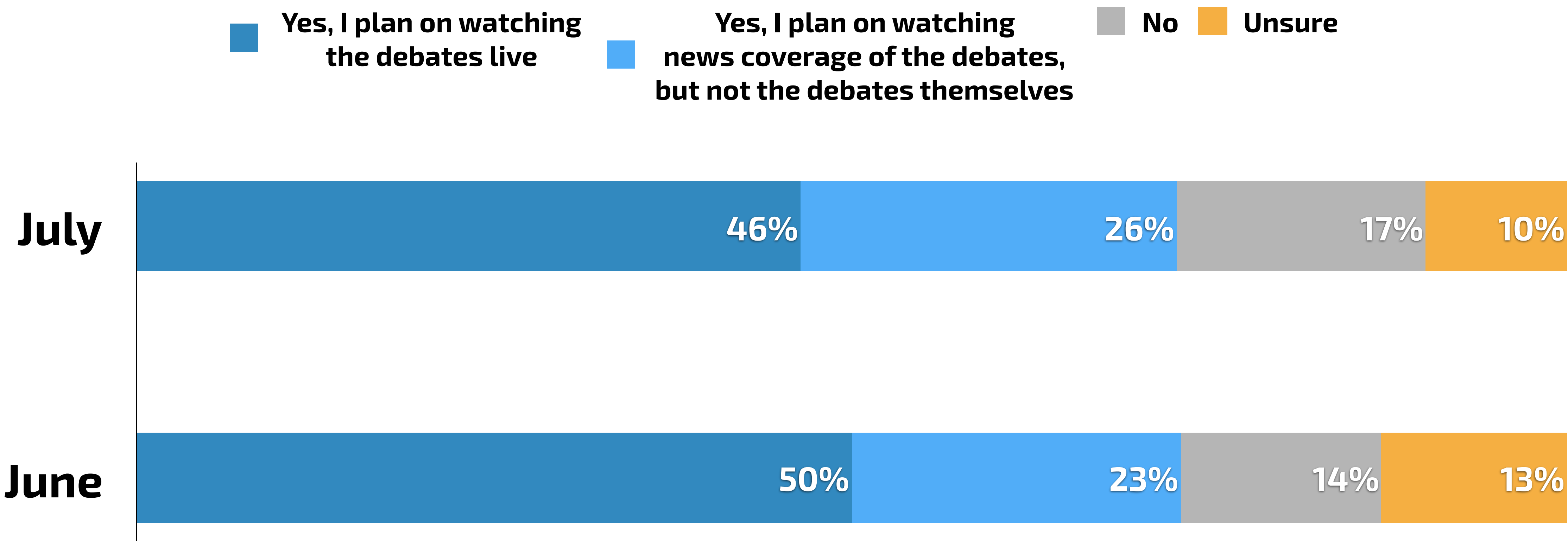
- Using a voter file-matched online panel, we surveyed n=1,026 registered voters across the country from July 23 to July 27, 2019, with a sample of 510 Democrats or Democratic-leaning Independents.
- With our third monthly tracking survey of 2019, we were able to track changes in the attitudes and behaviors of key 2020 voters since our last survey of verified Democratic or Democratic-leaning Independent voters from June 22 to June 25, 2019.

The Democratic Primary



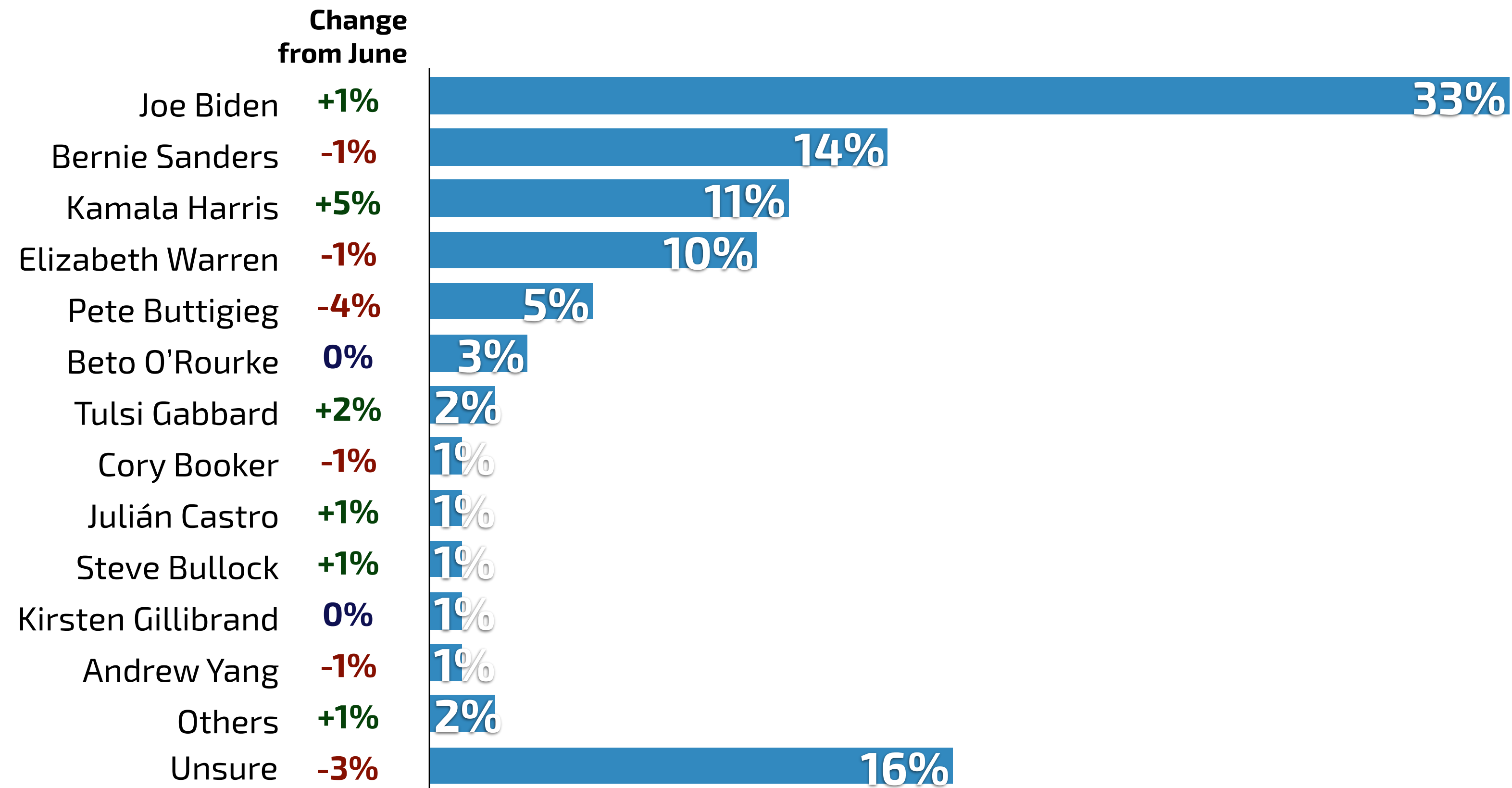
Democratic Interest in the Debates is Slightly Lower

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



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)

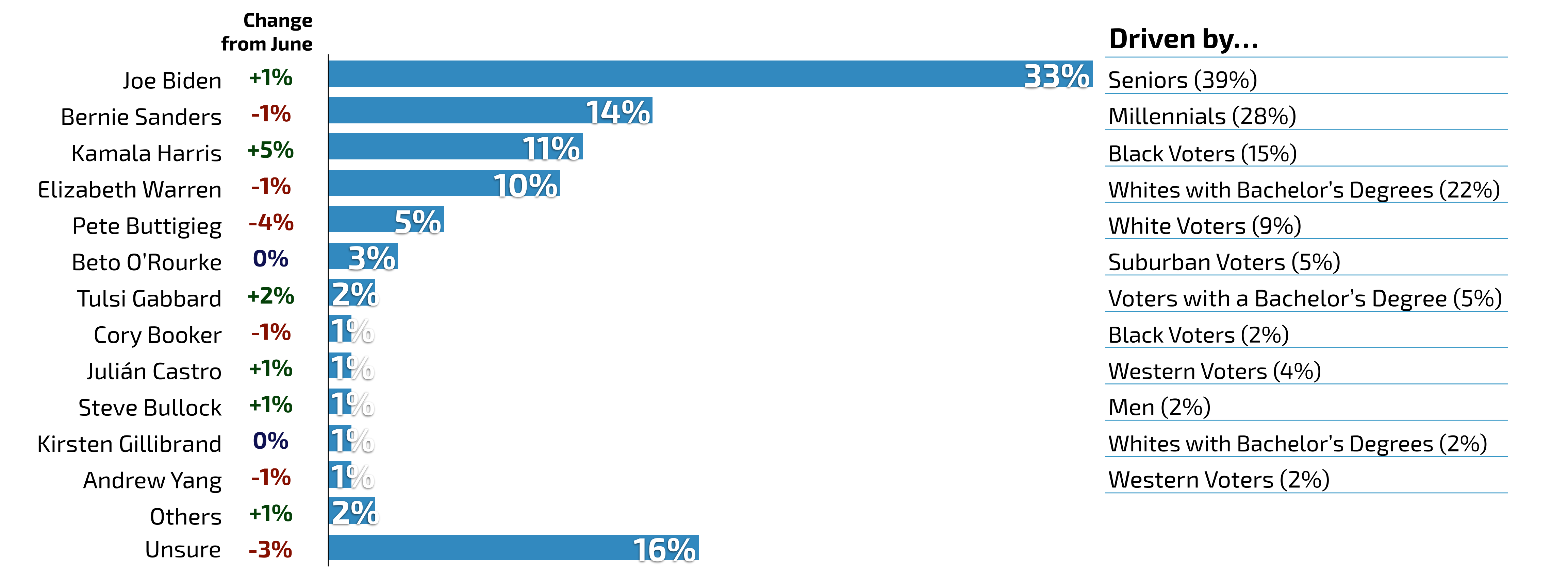


The following candidates were tested but received under 0.5% vote share:

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

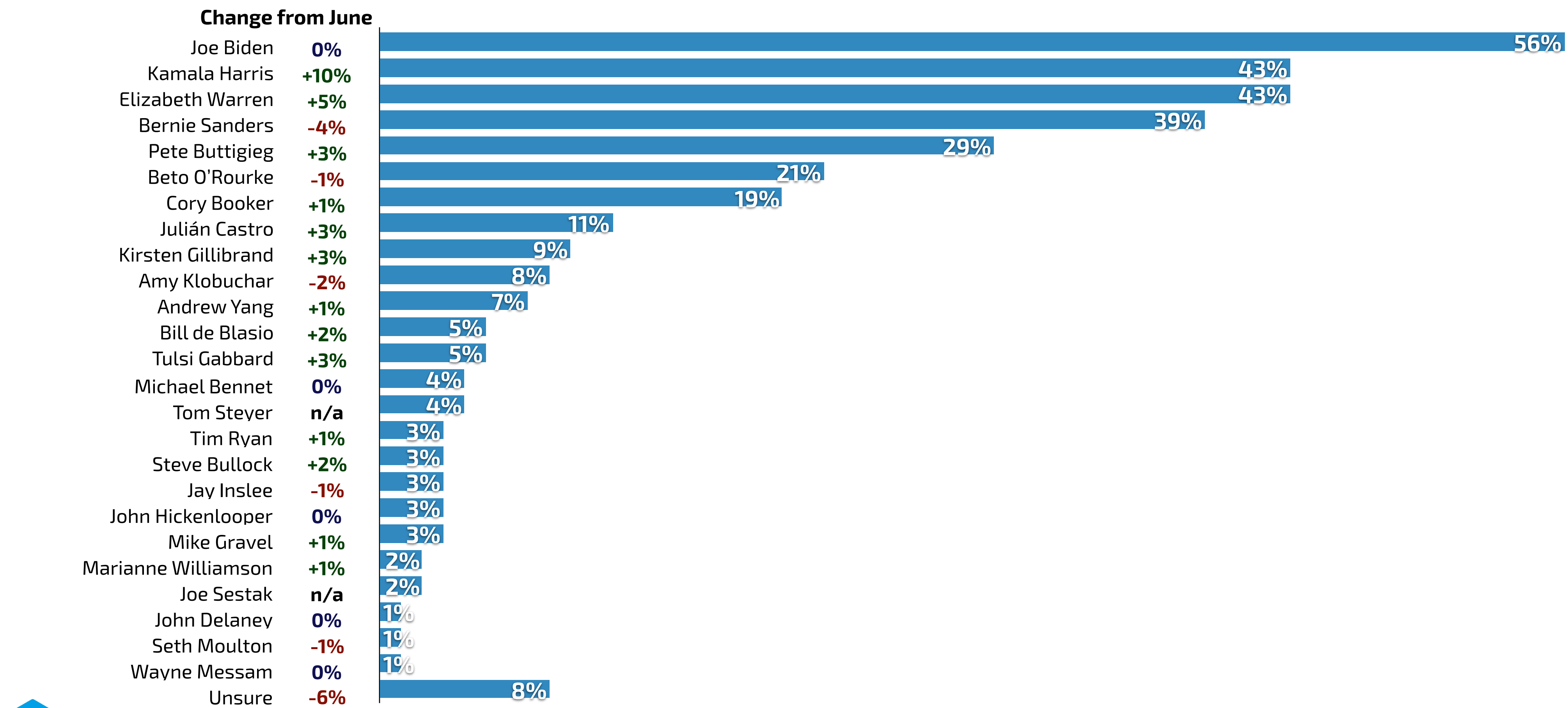
Harris Up By 5 Points Since June

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)



Democratic Voters are Open to a Wide Group of Candidates

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)



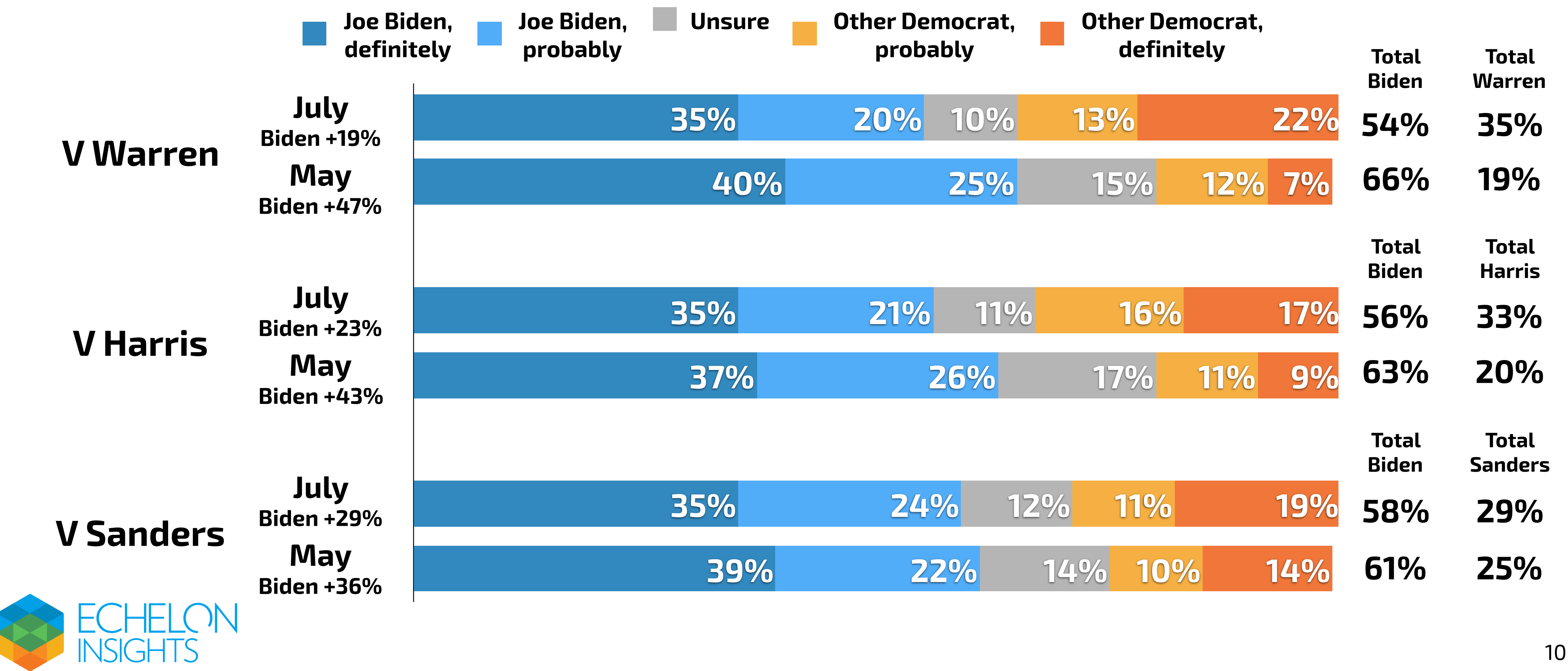
Differences in Race, Education Drive 2020 Picks

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)

All Democrats & Democratic-Leaners (N=510) 100% of sample		White Democrats without a Bachelor's Degree (n=155) 30% of sample		Whites Democrats with a Bachelor's Degree (n=139) 27% of sample		Black Democrats (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%)

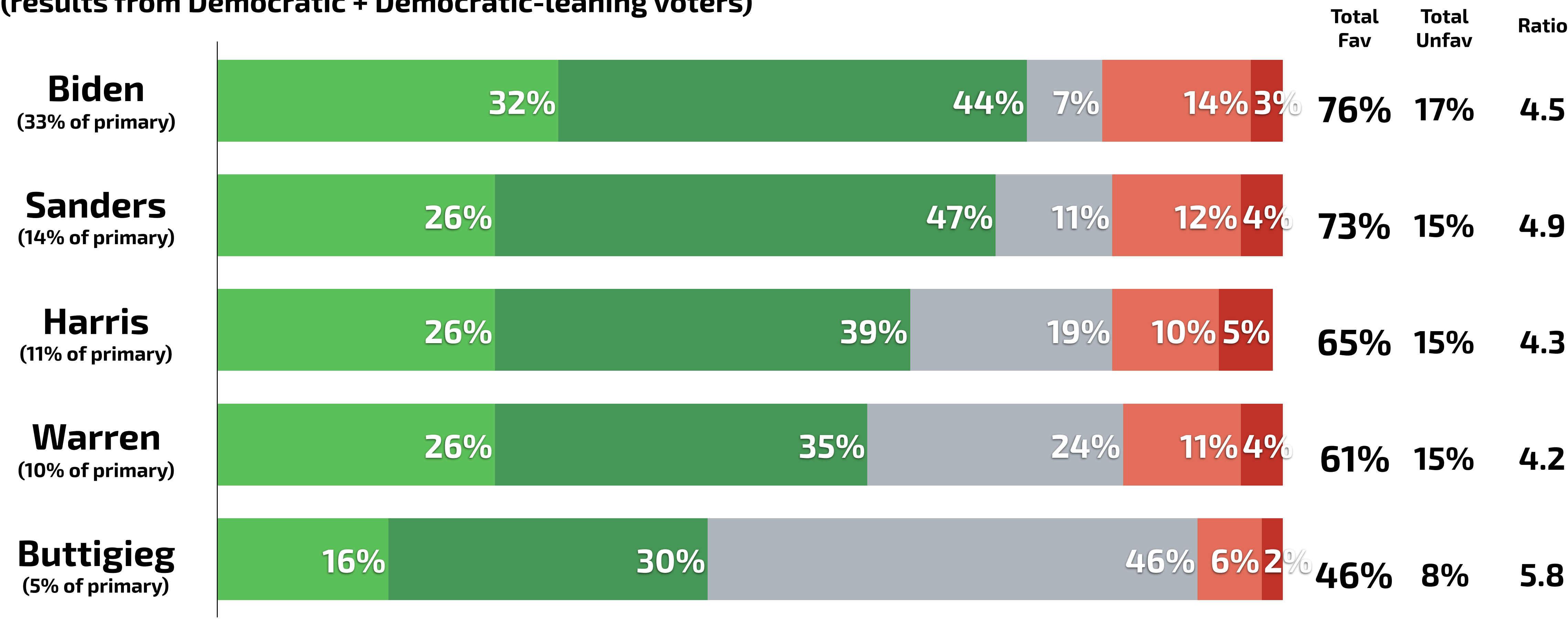
Warren Shows Strongest Advantage Against Biden

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)

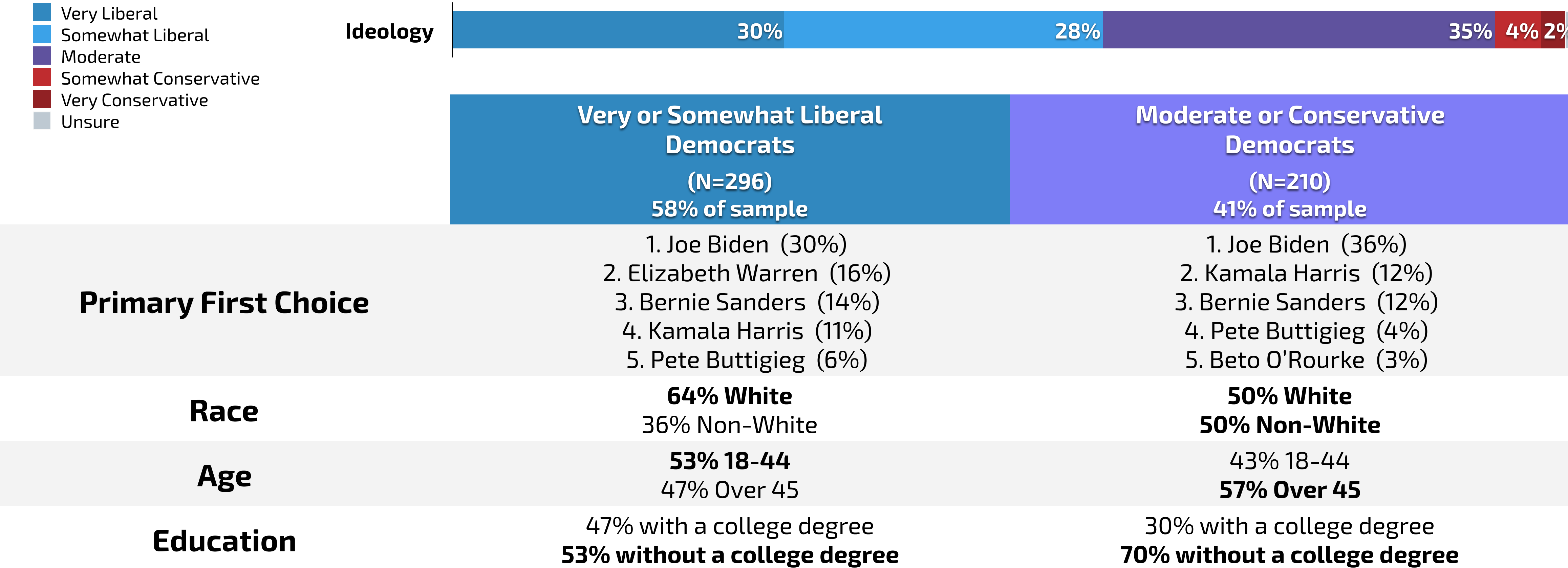


Biden Continues to Lead in Favorability Among Democrats

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



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=510) 100% of sample	With '16/'18 Primary Vote History (N=223) 44% of sample	Without '16/'18 Primary Vote History (N=286) 56% of sample	Liberals (N= 296) 58% of sample	Moderates & Conservatives (N= 210) 41% of sample	18-44 Years Old (N= 249) 49% of sample	45 and Older (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%



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