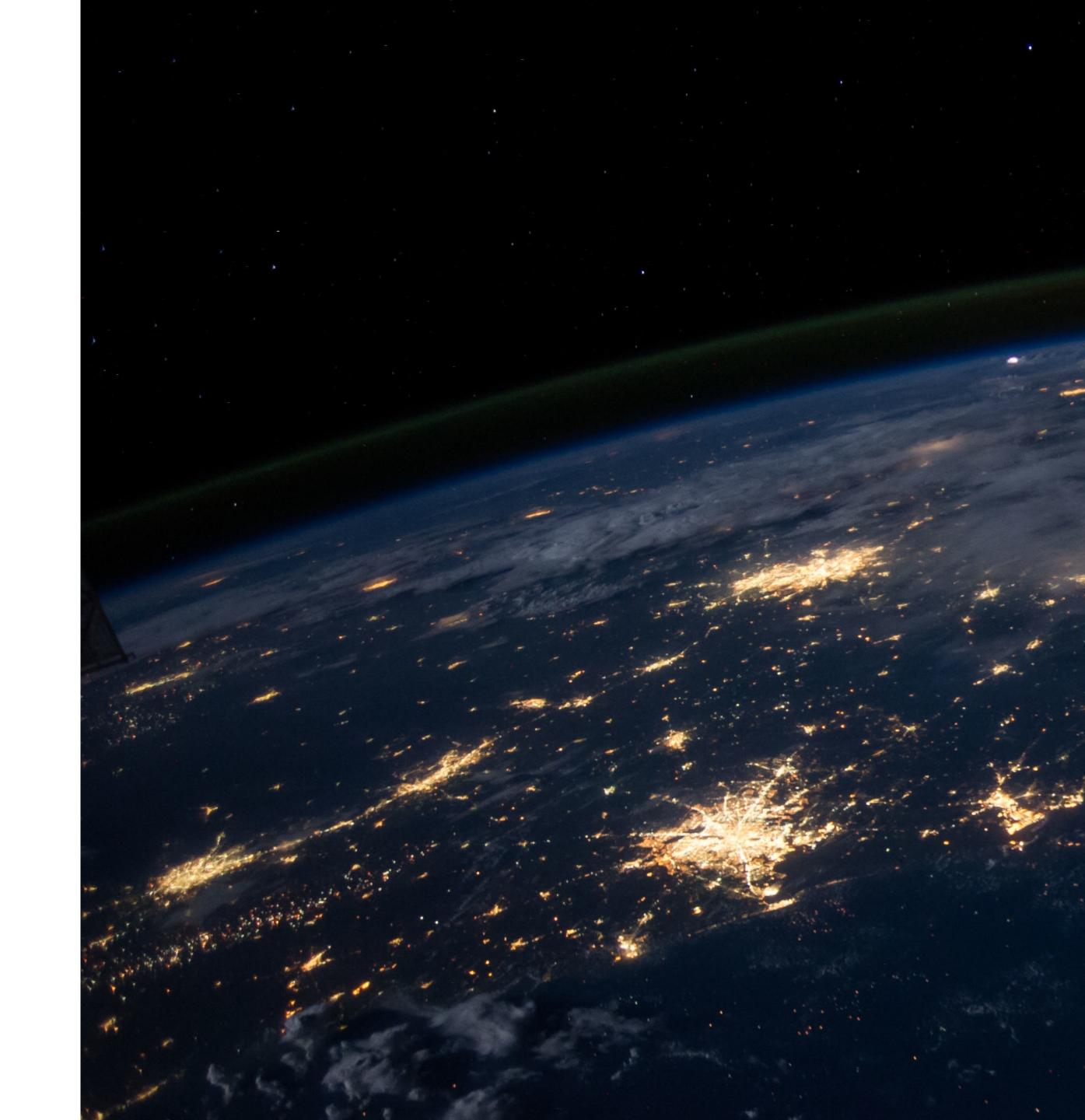


# Democratic Primary Update

#### Verified Voter Omnibus Survey N=449 Democratic or Democratic Leaning Likely Primary Voters October 21 - October 25, 2019



## **Key Findings**

- •
- a verified history of voting in primary elections.
- share from 19 percent in August, and Harris dropping to 5 percent, from 11 percent in August.
  - up 3 points from August.
- Conversely, Biden's advantage in head to head match-ups against both Sanders and Harris widened since August.
  - In August, Biden led Sanders by 20 points; today, Biden leads Sanders by 31 points.
  - In August, Biden led Harris by 24 points; today, Biden leads Harris by 37 points.



Joe Biden continues to lead the field of 19 Democratic Presidential candidates tested, receiving 32 percent support among **likely Democratic primary voters,** or about consistent with his 30 percent support among Democratic voters in August.

Biden runs 10 points ahead of Elizabeth Warren, and Biden leads by 6 among likely Democratic primary voters who with

Bernie Sanders and Kamala Harris each saw declines in support since August, with Sanders receiving 15 percent of the vote

• This puts Harris on even footing with Pete Buttigieg, who secured the support of **6 percent of likely Democratic voters**,

• Movement in head to head match-ups against Biden reflect recent shifts in support. In August, Biden held a 20 point advantage against Warren in a head to head match-up. Today, **Biden's lead against Warren narrowed to 11 points.** 



#### Methodology

- Voters.
- With our sixth monthly tracking survey of 2019, we were able to track from August 19 to August 21, 2019.



• Using a voter file-matched online panel, we surveyed n=1,002 registered voters across the country from October 21 to October 25, 2019, with a sample of 449 Democratic or Democratic-leaning Independent Likely

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

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)

fron	Change n August	
Joe Biden	+2%	
Elizabeth Warren	+11%	
Bernie Sanders	-4%	15%
Pete Buttigieg	+3%	6%
Kamala Harris	-6%	5%
Cory Booker	-2%	2%
Amy Klobuchar	+2%	2%
Andrew Yang	0%	1%
Beto O'Rourke	-3%	1%
Tulsi Gabbard	0%	1%
Tim Ryan	+1%	1%
Steve Bullock	+1%	1%
Tom Steyer	+1%	1%
Unsure	-3%	11%





32%

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

Joe Sestak John Delaney Julián Castro Marianne Williamson Michael Bennet Wayne Messam

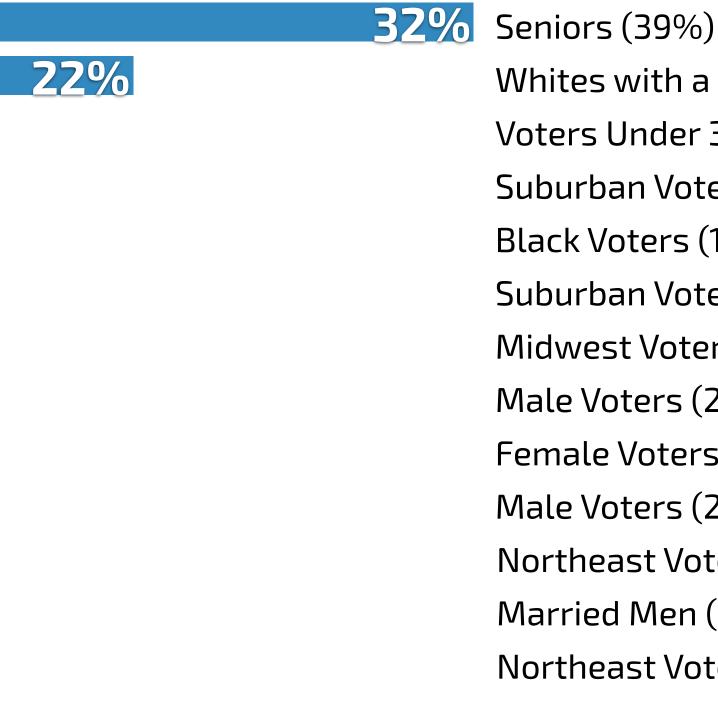


### Biden, Warren, Sanders At the Top of the Field

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Joe Biden	+2%	
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Pete Buttigieg	+3%	6%
Kamala Harris	-6%	5%
Cory Booker	-2%	2%
Amy Klobuchar	+2%	2%
Andrew Yang	0%	1%
Beto O'Rourke	-3%	1%
Tulsi Gabbard	0%	1%
Tim Ryan	+1%	1%
Steve Bullock	+1%	1%
Tom Steyer	+1%	1%
Unsure	-3%	11%





#### Driven by...

Whites with a Bachelor's Degree (28%) Voters Under 30 (32%) Suburban Voters (12%) Black Voters (11%) Suburban Voters (3%) Midwest Voters (3%) Male Voters (2%) Female Voters (2%) Male Voters (2%) Northeast Voters (2%) Northeast Voters (2%)



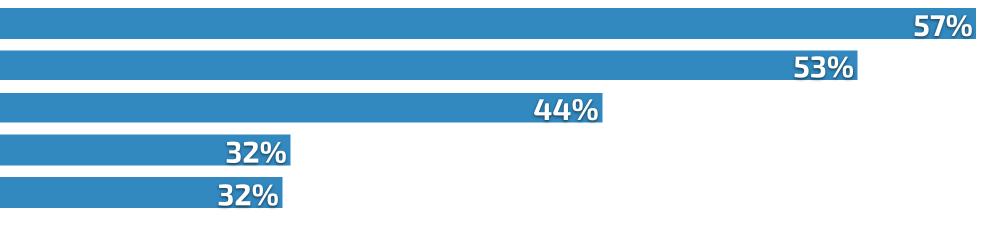
#### **Biden, Warren, Sanders Are Top Consideration Scores**

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

Change from	n August	t <sub>l</sub>
Joe Biden	-1%	
Elizabeth Warren	+10%	
Bernie Sanders	-4%	
Kamala Harris	-5%	
Pete Buttigieg	+7%	
Cory Booker	- <b>2%</b>	19%
Amy Klobuchar	+9%	17%
Beto O'Rourke	-7%	15%
Andrew Yang	+5%	14%
Julián Castro	-1%	9%
Tom Steyer	+1%	6%
Michael Bennet	0%	<b>4%</b>
Steve Bullock	0%	<b>4%</b>
Tulsi Gabbard	- <b>2%</b>	3%
Tim Ryan	-1%	2%
John Delaney	- <b>2</b> %	2%
Marianne Williamson	-3%	1%
Joe Sestak	0%	1%
Wayne Messam	0%	1%
Unsure	+6%	11%



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





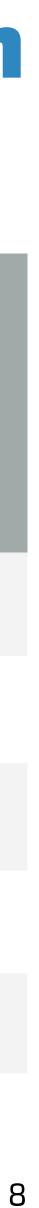
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### **Black Voters Show a Higher Preference for Biden**

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)

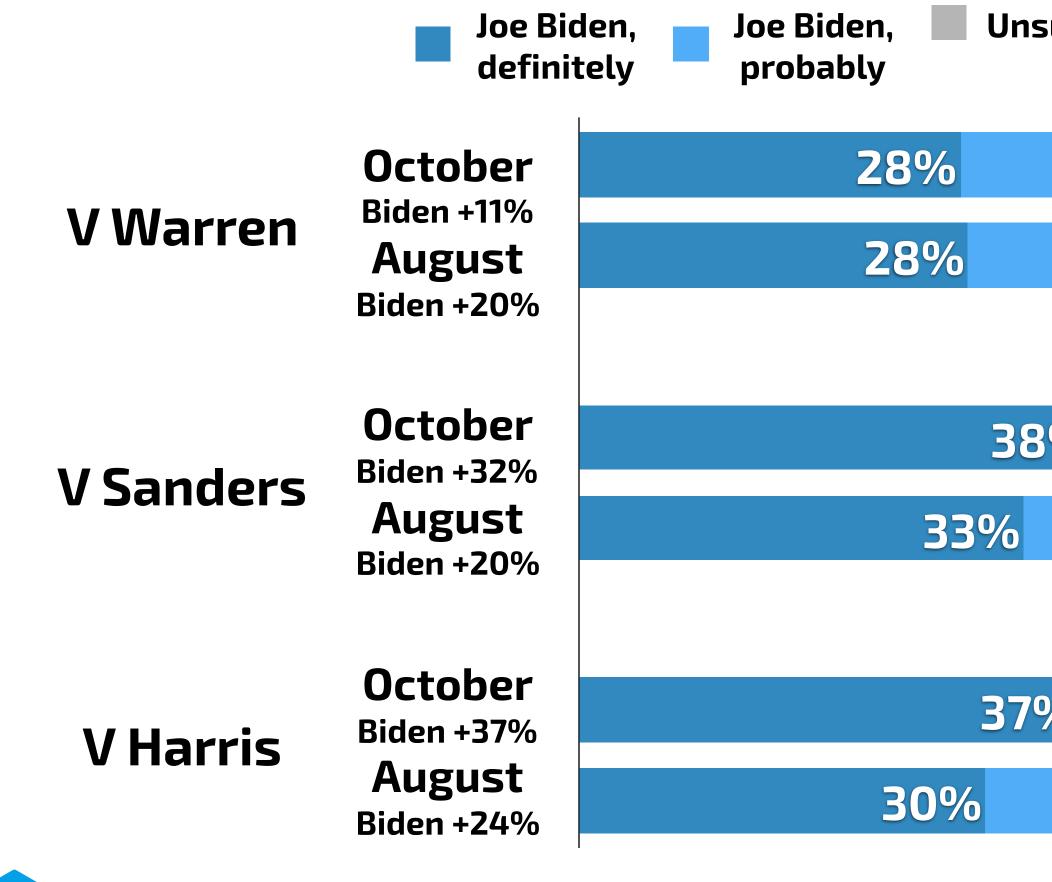
Demo	All crats & Democratic-Leaner	5 W	White Democrats ithout a Bachelor's Degree		White Democrats with a Bachelor's Degree		<b>Black Democrats</b>
	(N=449) 100% of sample		(n=131) 29% of sample		(n=160) 36% of sample		(n=89) 20% of sample
1.	Biden (32%)	1.	Biden (31%)	1.	Warren (28%)	1.	Biden (49%)
2.	Warren (22%)	2.	Warren (19%)	2.	<b>Biden (24%)</b>	2.	Warren (16%)
3.	Sanders (15%)	3.	Sanders (16%)	3.	Sanders (14%)	3.	Sanders (11%)
4.	Buttigieg (6%)	4.	Buttigieg (6%)	4.	Buttigieg (10%)	4.	Buttigieg (*%)
5.	Harris (5%)	5.	Harris (3%)	5.	Harris (3%)	5.	Harris (11%)





#### **Biden Leads Warren by 11 Points in a Direct Match-Up**

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)



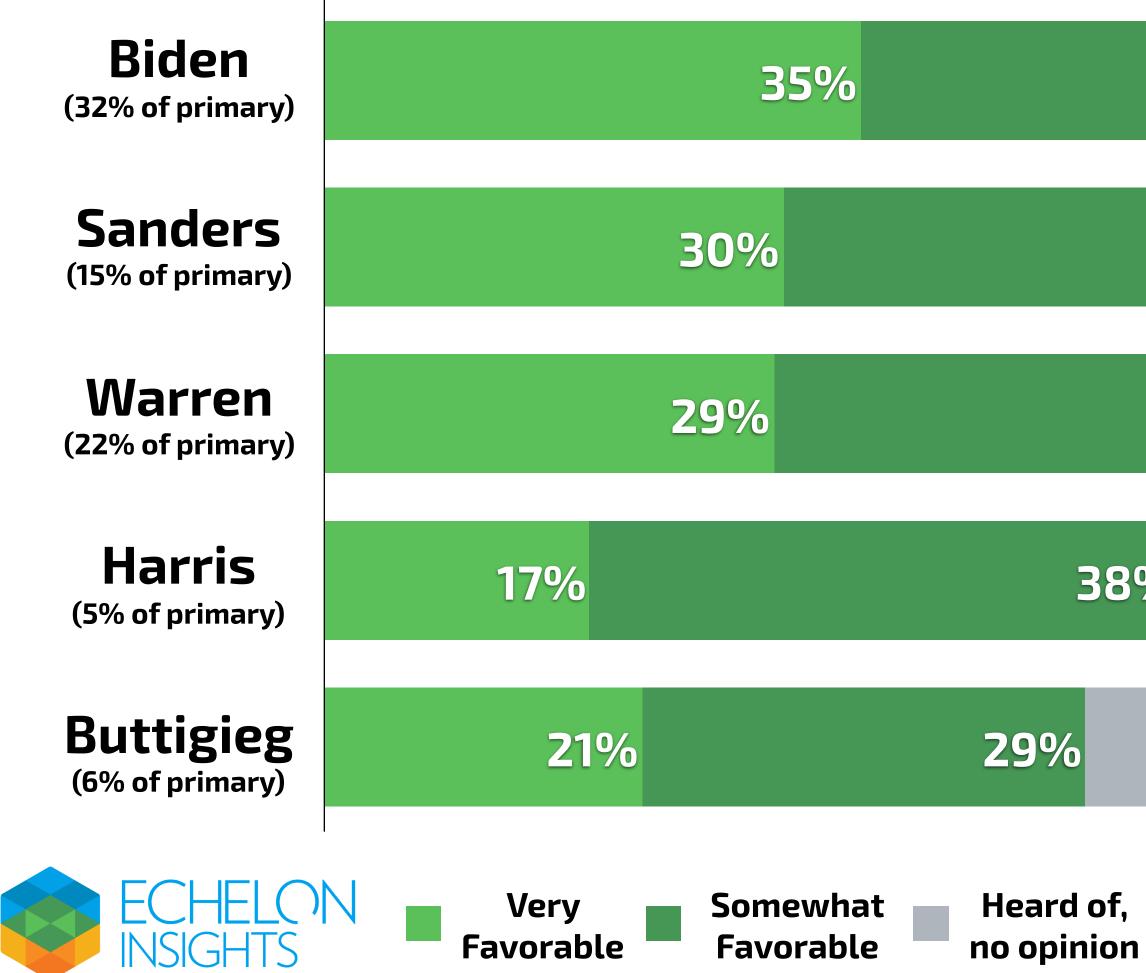


	Total Biden		ther Democrat, definitely		•	Other De prob	sure
9% 38%	<b>49%</b>	13%	21%		17%	<b>21%</b>	
2% 32%	<b>52%</b>	18%	15%	6	16%	23%	
	Total Biden						
0% 28%	60%	12%	17%	1%	.% 1	22	3%
5% 35%	55%	21%	4%	149	10%	23%	
	Total Biden						
2% 25%	<b>62%</b>	13%	<b>6</b> 12%	13%	25%		%
5% 31%	55%	17%	14%	%	14	25%	

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#### Warren Sports the Best Fav-Unfav Ratio in the Field

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)



		Total Fav	Total Unfav	Ratio
	40% 8% 0% 14% 3%	<b>75%</b>	17%	4.5
	41% 11% 0% 12% 6%	<b>71%</b>	18%	4.0
	<b>41%</b> 18% 3%7% 29	<b>70%</b>	<b>9%</b>	7.7
38%	26% 5% 11% 4%	55%	14%	3.9
	28% 16% 4%	<b>6</b> 49%	7%	7.3
l of, nion	Never Somewhat Very heard of Unfavorable Unfavorab	le		1



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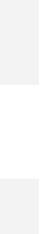
#### Likely Democratic Primary Voters Break Down as 57% Liberal, 41% Moderate or Conservative

<ul> <li>Very Liberal</li> <li>Somewhat Liberal</li> <li>Moderate</li> <li>Somewhat Conservative</li> </ul>	Ideology	21%	36%	33% <mark>6%</mark> 3%
<ul> <li>Very Conservative</li> <li>Unsure</li> </ul>		Very or Somewhat Liberal Democrats (N=255) 57% of sample		ate or Conservative Democrats (N=186) 41% of sample
Primary First Ch	1. 2. 3. 4. 5.	Warren (26%) Biden (25%) Sanders (21%) Buttigieg (8%) Harris (6%)	1. 2. 3. 4. 5.	Biden (42%) Warren (16%) Sanders (8%) Harris (4%) Booker (3%)
Race		<b>71% White</b> 29% Non-White	4	<b>57% White</b> 3% Non-White
Age		35% 18-44 <b>65% Over 45</b>		32% 18-44 <b>68% Over 45</b>
Education		51% with a college degree 49% without a college degree		rith a college degree hout a college degree





























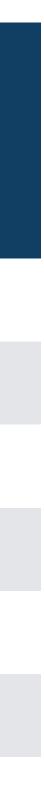
#### **Overall Vote Choice**

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=449) 100% of sample	(N=288) 64% of sample	(N=160) 36% of sample	(N=255) 57% of sample	(N=186) 41% of sample	(N=152) 34% of sample	(N=297) 66% of sample
Biden	32%	32%	31%	25%	42%	28%	34%
Warren	22%	26%	21%	26%	16%	14%	25%
Sanders	15%	12%	16%	21%	8%	27%	9%
Buttigieg	6%	7%	6%	8%	3%	4%	6%
Harris	5%	6%	5%	6%	4%	3%	6%
Booker	2%	2%	2%	1%	3%	2%	2%
Klobuchar	2%	2%	2%	1%	3%	_	3%



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







#### ECHELON INSIGHTS

