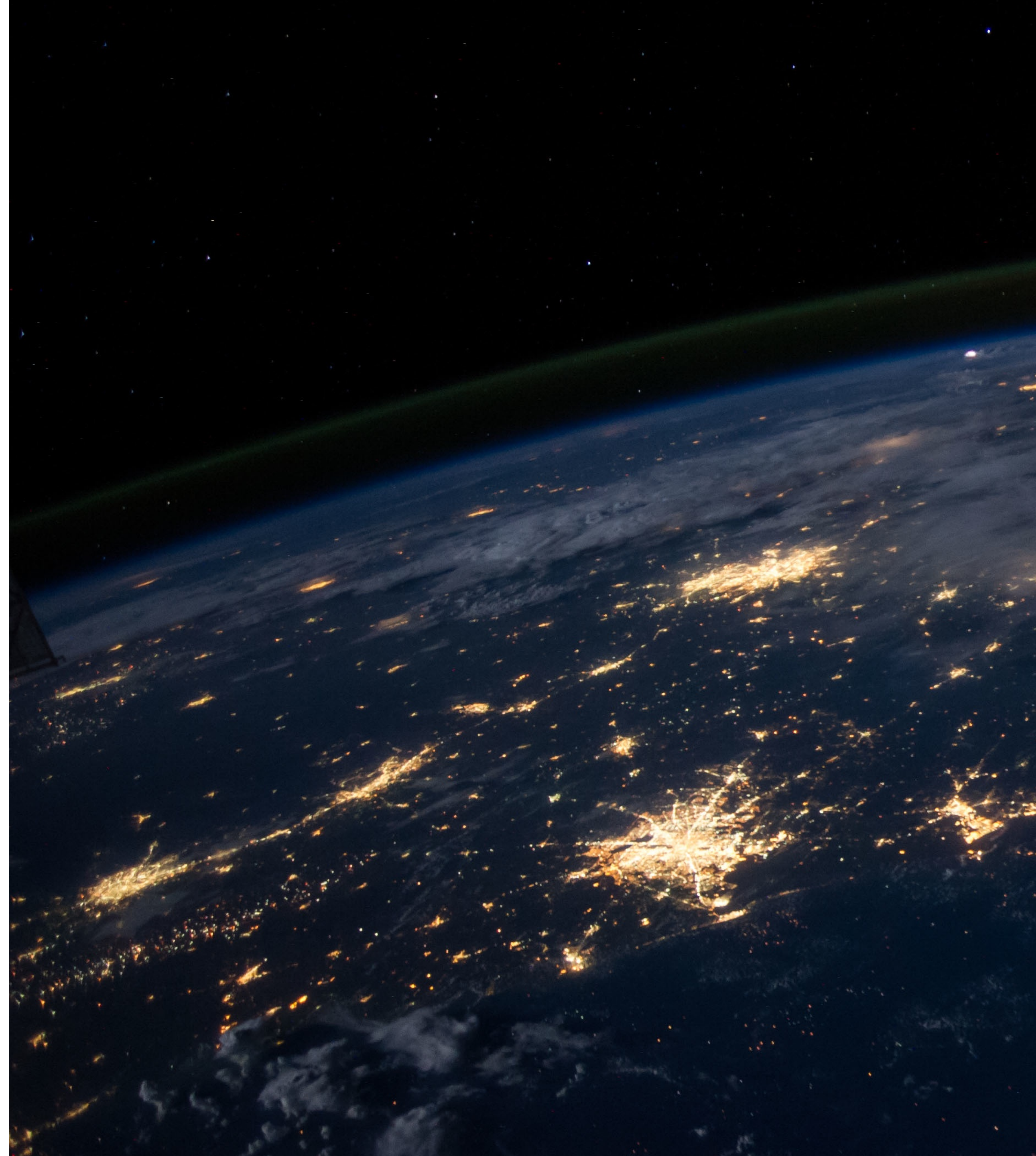




Democratic Dividing Lines

Verified Voter Omnibus Survey
N=499 Democrats or Democratic leaners
April 17 - 19, 2019



Key Findings

- **Democrats overwhelmingly want a candidate ideologically in line with Barack Obama** (59%) rather than one more liberal (17%) or more conservative (12%) — and this is a key dividing line in primary vote choice.
 - Biden leads by double digits among the 7 in 10 Democrats who want a candidate in line with Obama or more conservative than him, while Sanders leads by 25 points among those who want someone more liberal.
- Prior to entering the race, **Biden led the primary field by 26% over 22% for Sanders**. When looking at those who voted in the 2016 or 2018 primaries according to the voter file, Biden's lead grows to 10 points — 30 to 20%.
- **Pete Buttigieg is helped when the universe is limited to verified primary voters** (12% among primary voters vs. 3% among non-voters) while Beto O'Rourke is hurt by such a shift (5% among primary voters vs. 13% among non-voters).
- **Standout demographics:** Midwesterners for Biden, Young voters for Sanders, Men for O'Rourke, Whites with a college degree for Buttigieg, African-Americans for Kamala Harris, Whites with a college degree for Elizabeth Warren.
- **Biden support is experience- and character-driven** (48% of his supporters volunteer his experience as the reason for their support), while **Sanders support is predominantly policy-driven** (cited by 33% of supporters). O'Rourke support is a mix of policy & youth, Buttigieg's predominantly youth followed by intelligence, and Harris' a mix of policy & experience.

Methodology

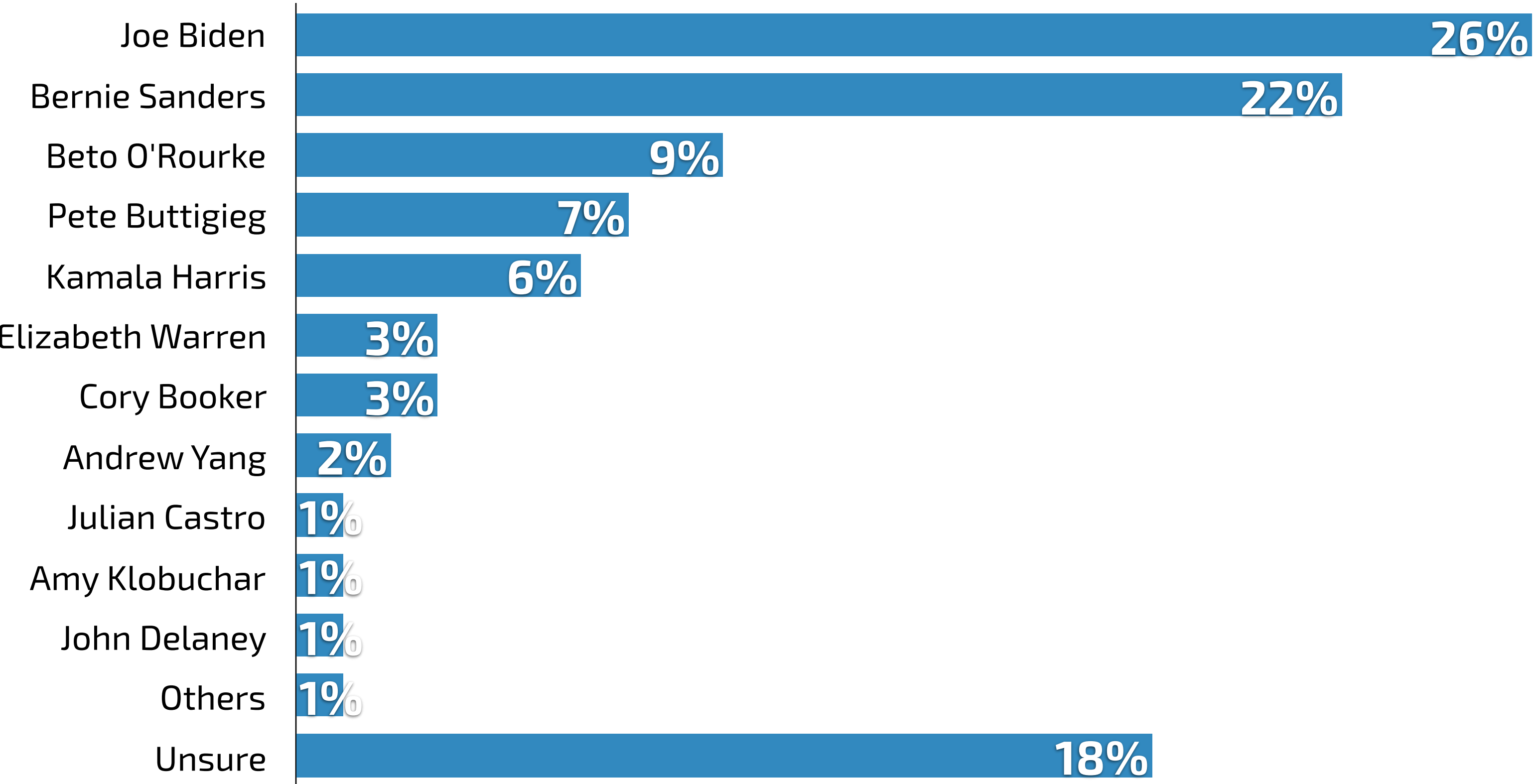
- Using a voter file-matched online panel, we surveyed n=1,004 registered voters across the country from April 17 to April 19, 2019, with a sample of 499 Democrats or Democratic-leaning Independents.
- Through our use of verified voter file data, we were able to confirm the voting history of participants and isolate the attitudes, behaviors, and ideological guiding principles of key 2020 audiences.

The Democratic Primary



Biden & Sanders Lead 2020 Primary

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)

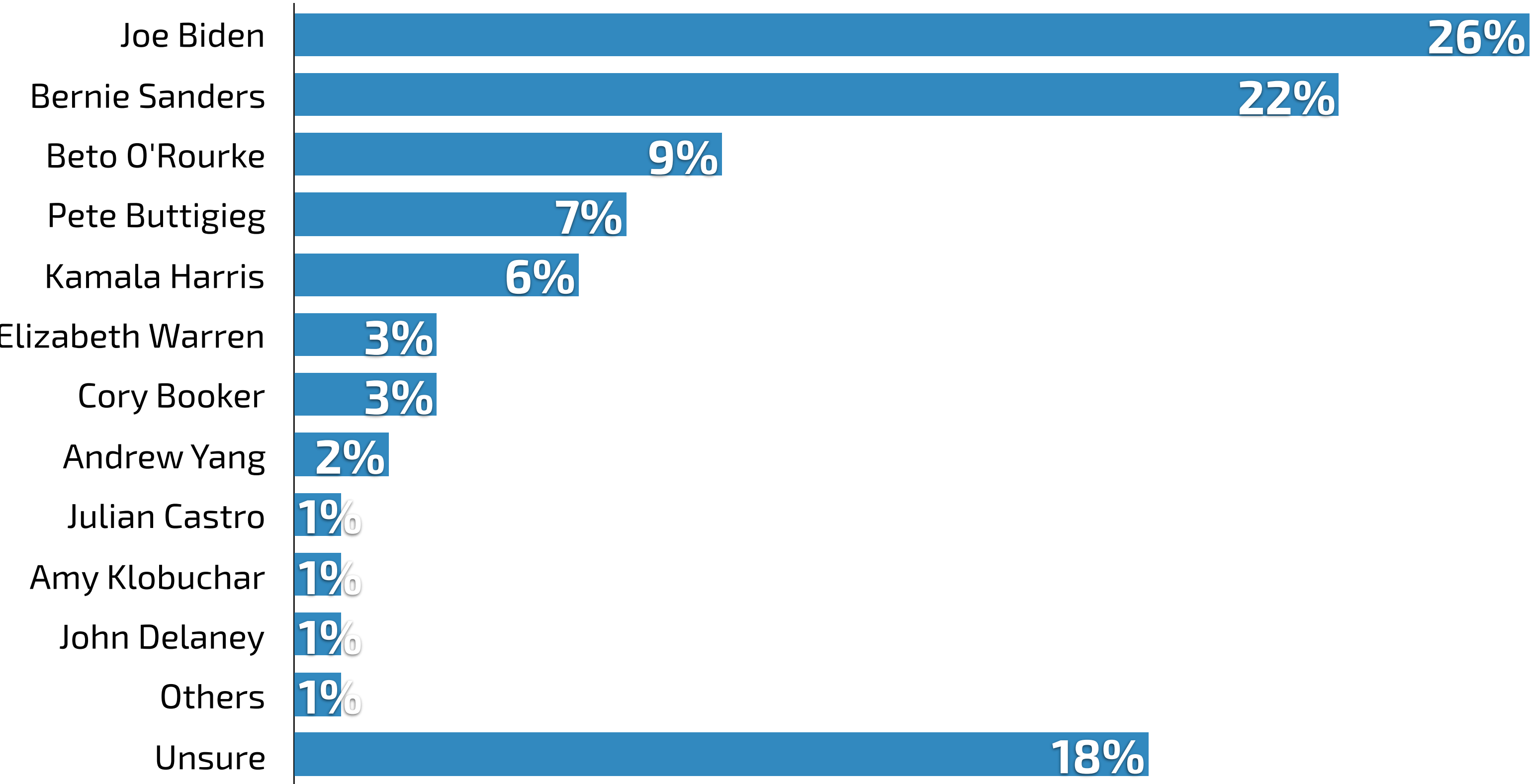


The following candidates were tested but received under 1% vote share:

- Kirsten Gillibrand
- John Hickenlooper
- Tulsi Gabbard
- Tim Ryan
- Eric Swalwell
- Michael Bennet
- Jay Inslee
- Marianne Williamson
- Bill de Blasio
- Wayne Messam
- Seth Moulton

Biden & Sanders Lead 2020 Primary

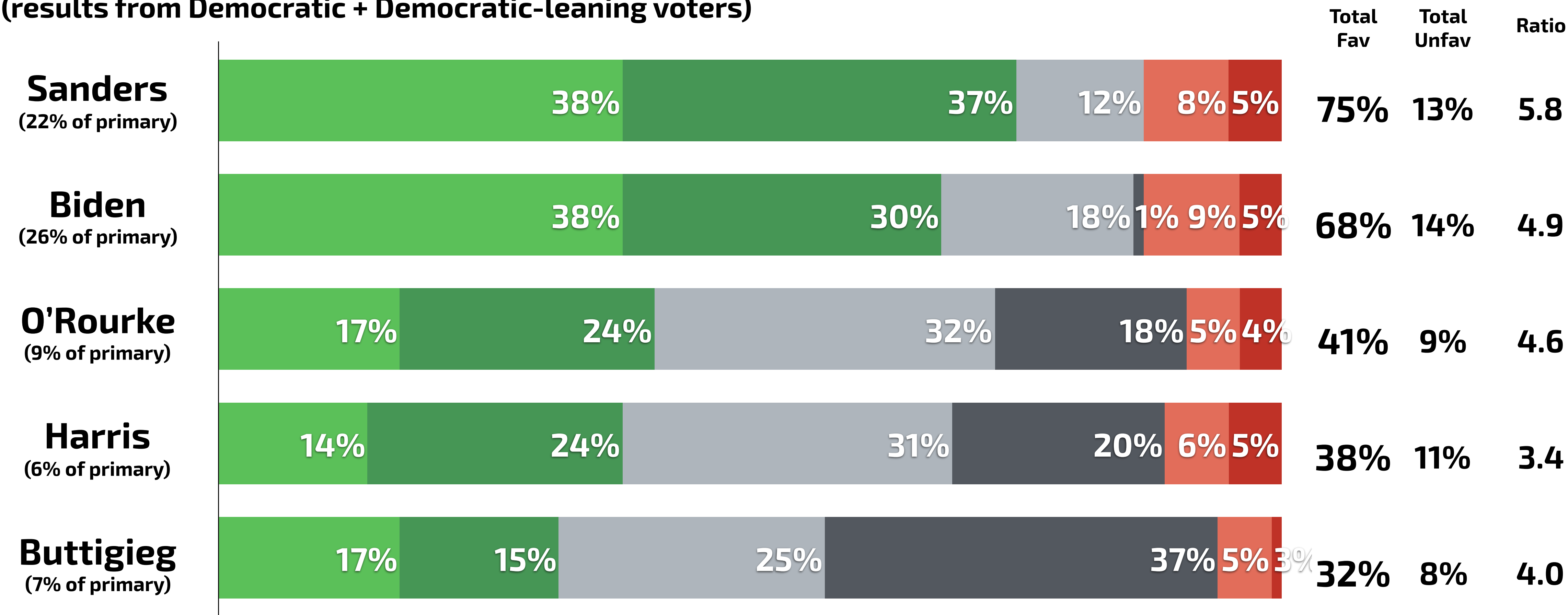
Q. If the election were being held today, which candidate would you support for the Democratic nomination for President in 2020? (asked of Democrats & Democratic leaners)



Driven by...
Midwestern Democrats (33%)
18-29 Year Olds (35%)
Men (12%)
Whites with a College Degree (14%)
Black Voters (10%)
Whites with a College Degree (8%)
Black Voters (7%)
Men (4%)
Hispanic Voters (3%)
Retired Voters (2%)
Midwestern Democrats (2%)

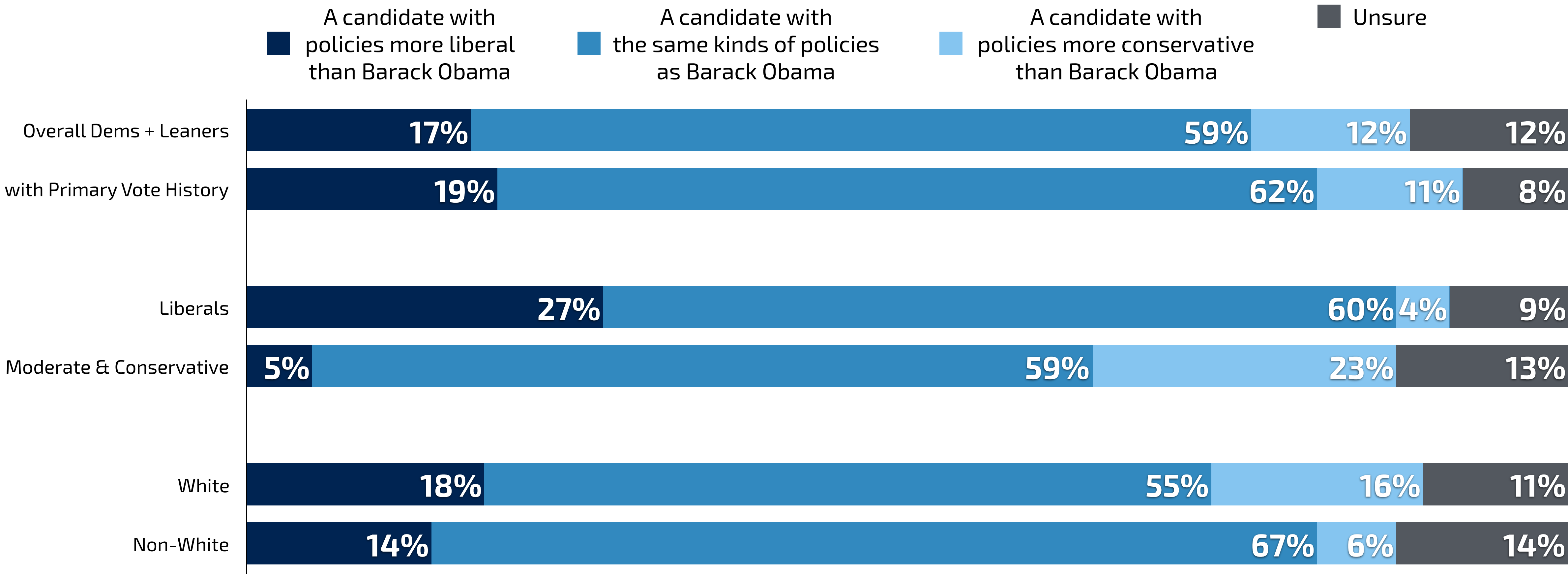
Sanders Leads Top Picks in Favorability

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)



Most Democrats Want Another Obama

Q. Which kind of Democratic candidate would you prefer?



Obama's Legacy is a Dividing Line in the Primary

Q. Which kind of Democratic candidate would you prefer?

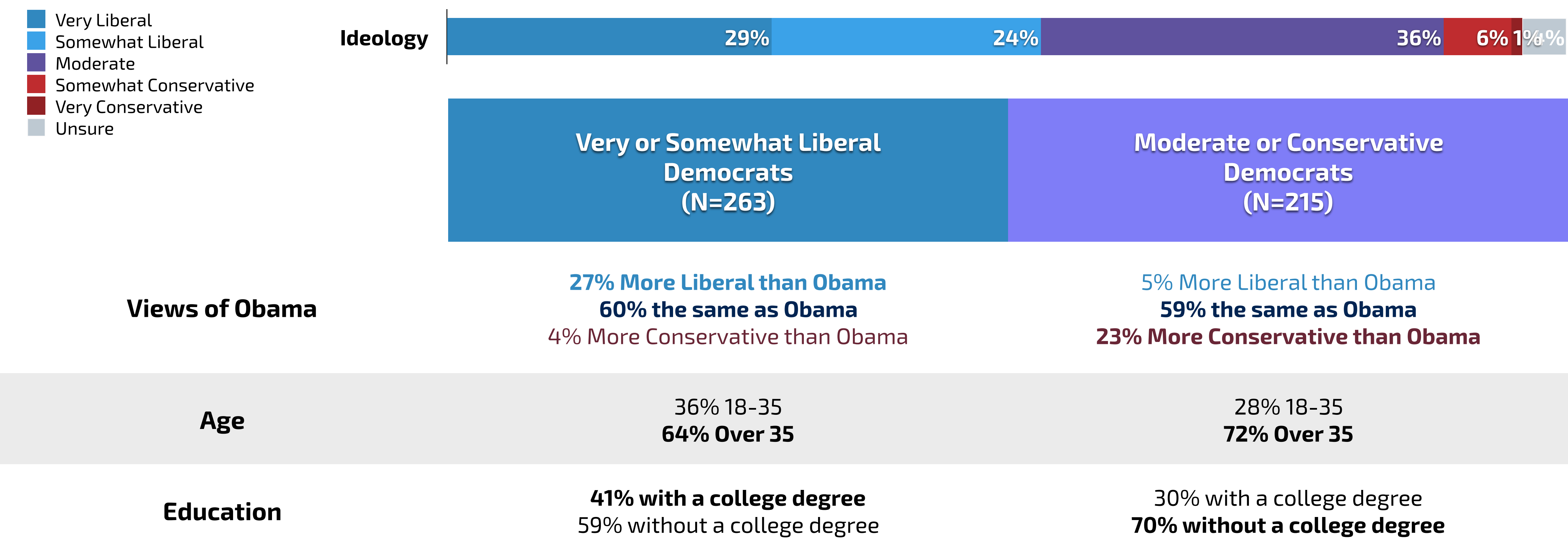
Biden Leads Among 7-in-10 Democrats Who Don't Want Someone More Liberal Than Obama		
A candidate with policies MORE LIBERAL than Barack Obama	A candidate with THE SAME kinds of policies as Barack Obama	A candidate with policies MORE CONSERVATIVE than Barack Obama
17% of Democrats (N=82)	59% of Democrats (N=296)	12% of Democrats (N=59)
2020 Primary Vote	2020 Primary Vote	2020 Primary Vote
1. Bernie Sanders (40%)	1. Joe Biden (30%)	1. Joe Biden (31%)
2. Joe Biden (15%)	2. Bernie Sanders (18%)	2. Bernie Sanders (16%)
3. Beto O'Rourke (7%)	3. Beto O'Rourke (10%)	3. Beto O'Rourke (16%)
2020 Presidential Vote	2020 Presidential Vote	2020 Presidential Vote
D+100	D+95	D+65

A Profile of the Democratic Electorate

Using a voter file-matched online panel, we were able to segment Democratic voters into two groups: voters who have a confirmed record of voting in the 2016 or 2018 primary election, and those with no or unconfirmed vote history in those elections.

	Self-Identified Democrats & Leaners With '16/'18 Primary Vote History (N=232)	Self-Identified Democrats & Leaners Without '16/'18 Primary Vote History (N=267)
Views of Obama	19% More Liberal than Obama 62% the same as Obama 11% More Conservative than Obama	14% More Liberal than Obama 57% the same as Obama 13% More Conservative than Obama
Race	68% White 32% Non-White	51% White 49% Non-White
Age	21% 18-35 79% Over 35	43% 18-35 57% Over 35
Education	45% with a college degree 55% without a college degree	26% with a college degree 74% without a college degree

Democrats Break Down as 53% Liberal, 43% Moderate or Conservative



Demographics Drive Vote Choice, Ideology

	All Democrats & Democratic- Leaners (N=499)	With '16/'18 Primary Vote History (N=232)	Without '16/'18 Primary Vote History (N=267)	Liberals (N=263)	Moderates & Conservatives (N=215)	Whites (N=294)	Non-Whites (N=216)	18-44 Years Old (N=246)	45 and Older (N=253)
Biden	26%	30%	22%	22%	30%	29%	22%	16%	36%
Sanders	22%	20%	25%	27%	17%	19%	27%	30%	15%
O'Rourke	9%	5%	13%	10%	9%	8%	11%	13%	6%
Buttigieg	7%	12%	3%	9%	6%	9%	4%	4%	10%
Harris	6%	6%	6%	6%	6%	5%	7%	8%	5%
IDEOLOGY VS. OBAMA									
More Liberal than Obama	17%	19%	14%	27%	5%	18%	14%	20%	14%
Same as Obama	59%	62%	57%	60%	59%	55%	67%	60%	59%
More Conservative than Obama	12%	11%	13%	4%	23%	16%	6%	9%	15%

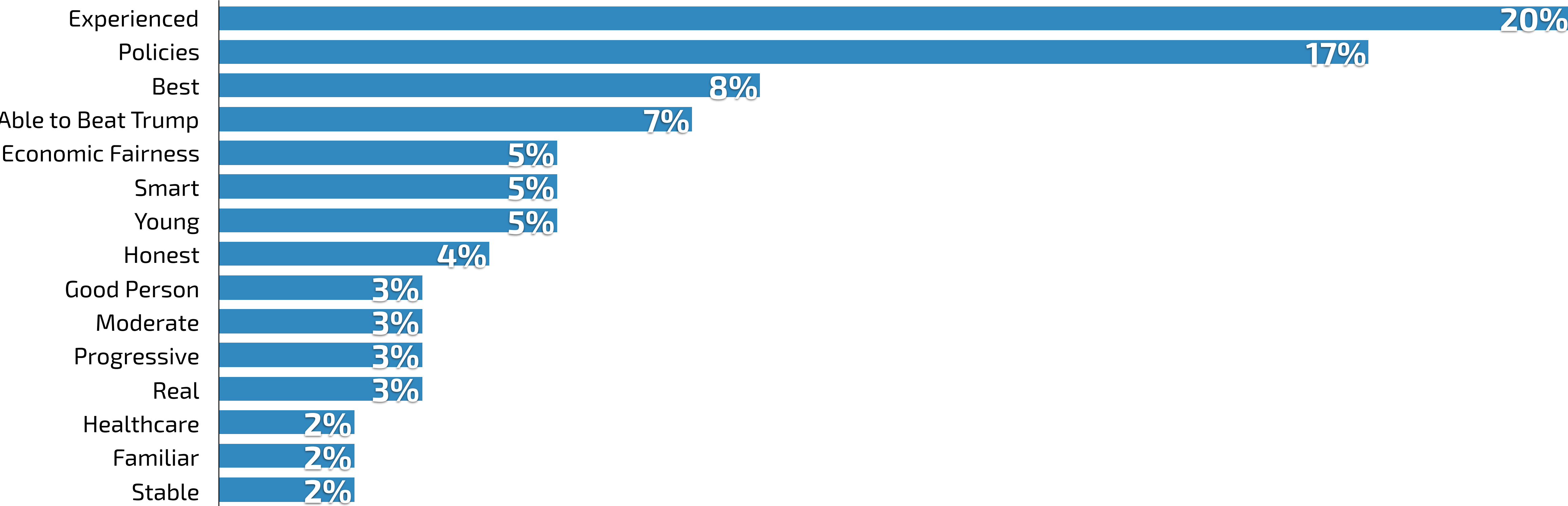
The Reasoning Behind the Primary Vote



Democrats Want Experience, Policies and the Ability to Beat Trump

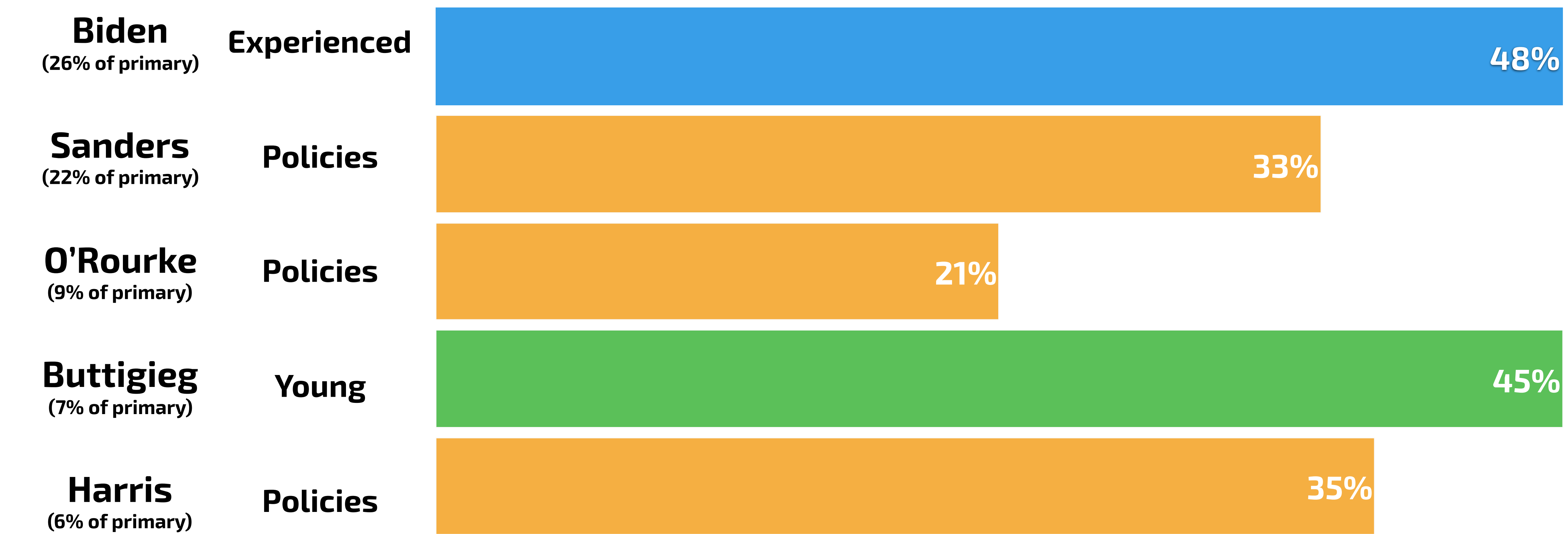
We aggregated over 400 open end responses explaining why Democratic voters picked the candidate they did, breaking out the multitude of reasons guiding Democratic vote choice.

Top Traits Listed Across All Candidates include...



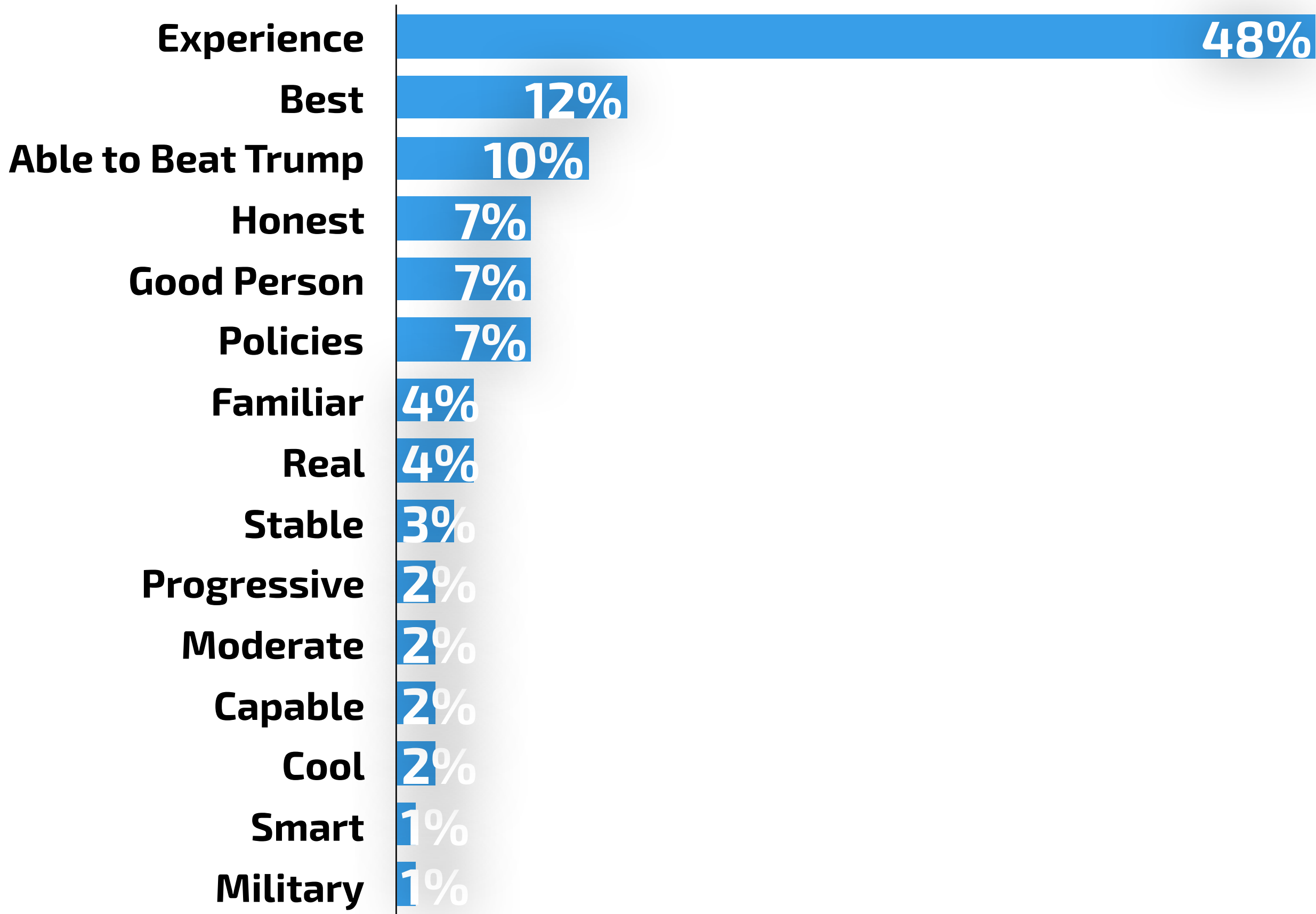
Support for Top Candidates Driven by Experience, Policies

Q. Why do you support this candidate? [OPEN-END]



Biden Supporters Overwhelmingly Cite Experience

Q. Why do you support this candidate? [OPEN-END]



“I think he is one of the potential Democratic candidates who can beat Donald Trump outside of the dark blue states.”

“He has the best chance to win”

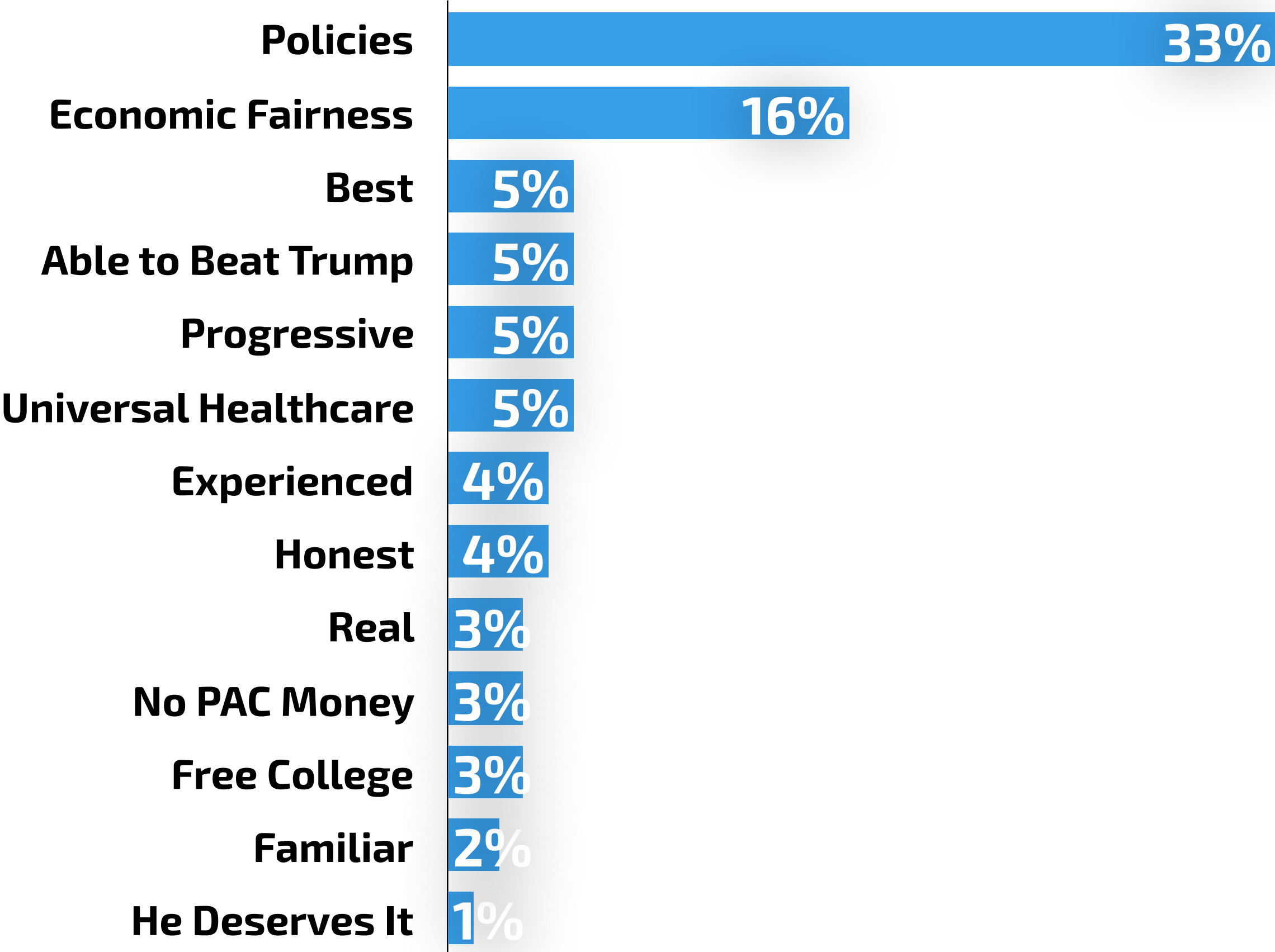
“I feel he is extremely knowledgeable about how things should and need to be done. He has so much experience”

“I believe that he and President Obama did good for our country and supported the lower and middle classes, which is how it should be to begin with.”

“I trust him. I believe that he can defeat Trump and handle Trumps rhetoric and bullying.”

Sanders Support is Policy-Driven

Q. Why do you support this candidate? [OPEN-END]



“He is the most Real Progressive Democrat that has declared himself a candidate to date.”

“He wants healthcare for all.”

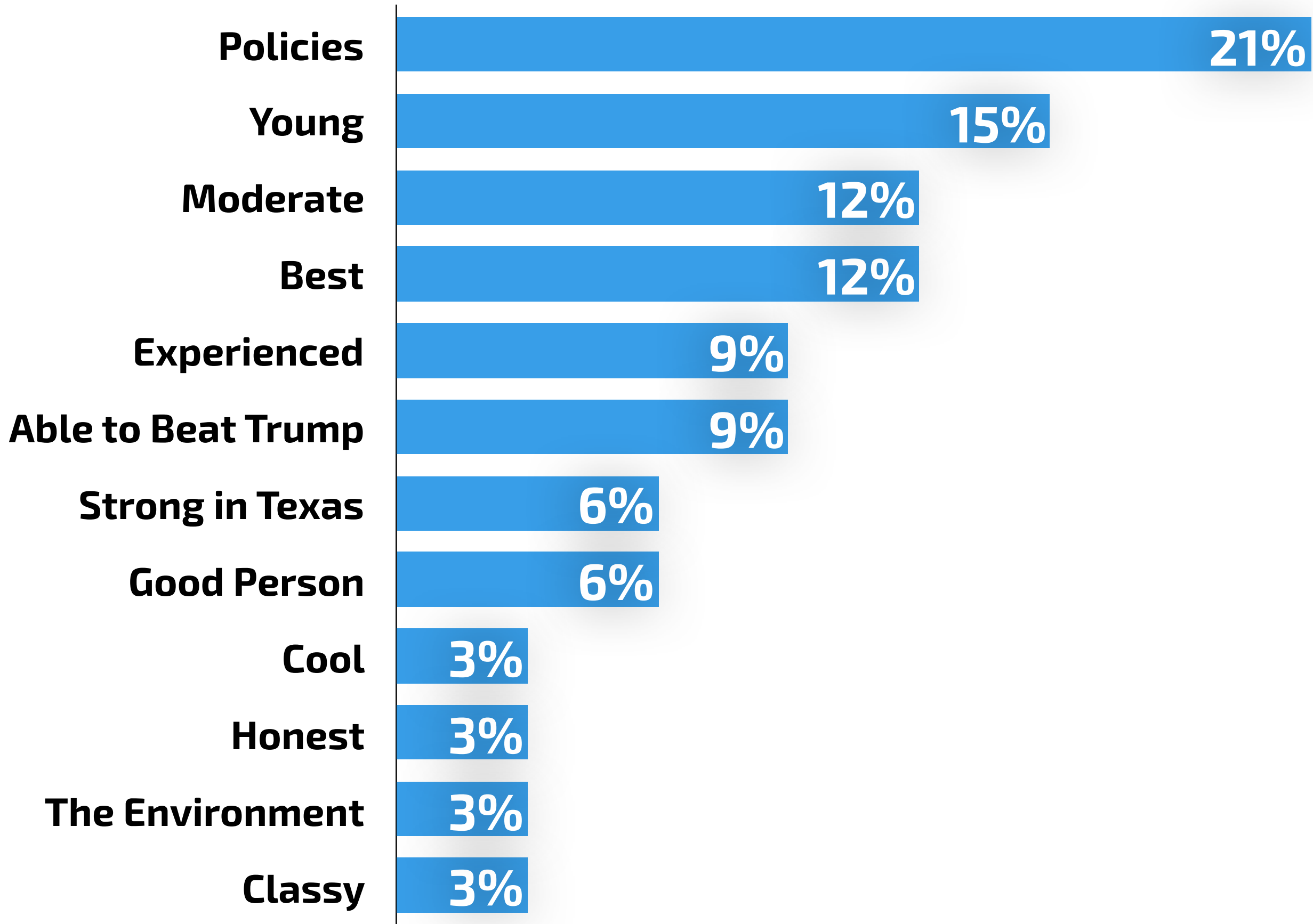
“Bernie's policy positions are not just popular, they're the solution to our country's problems. Medicare for All or bust.”

“He will favor the lower class public rather than rich people”

“Bernie Sanders stands for all that is right for America. He wants to help all people. Not just the rich. Tax the rich, free college. Higher wages, Medicare for ALL.”

O'Rourke Supporters Relate to Ideas and Youth

Q. Why do you support this candidate? [OPEN-END]



“He thinks of moving America forward. Saving the environment by using alternate energy. Saving Social Security and the price of meds and getting medical insurance. Working with both political parties and other countries. Treating people equalitly and not down to them and he listens”

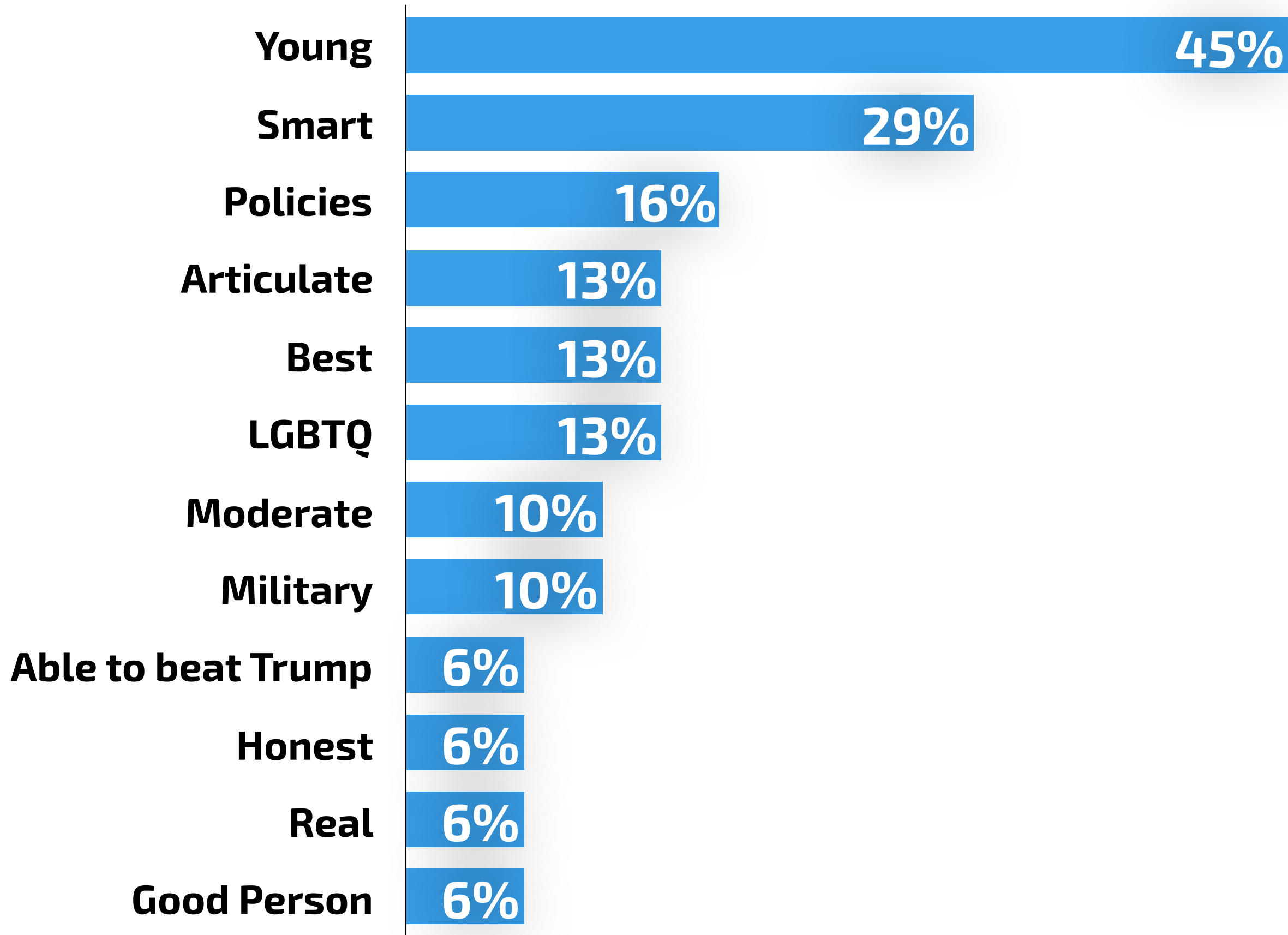
“He is cool and knows wtf hes talking about”

“He is young and dynamic - to attract the younger voters, we need a candidate they can relate to”

“I believe him to be more moderate than some of the extremely left candidates.”

Buttigieg Support is Bolstered by Youth, Intelligence

Q. Why do you support this candidate? [OPEN-END]



“He's young, intelligent and most of all he is presidential.”

“I like his youth and fresh perspective.”

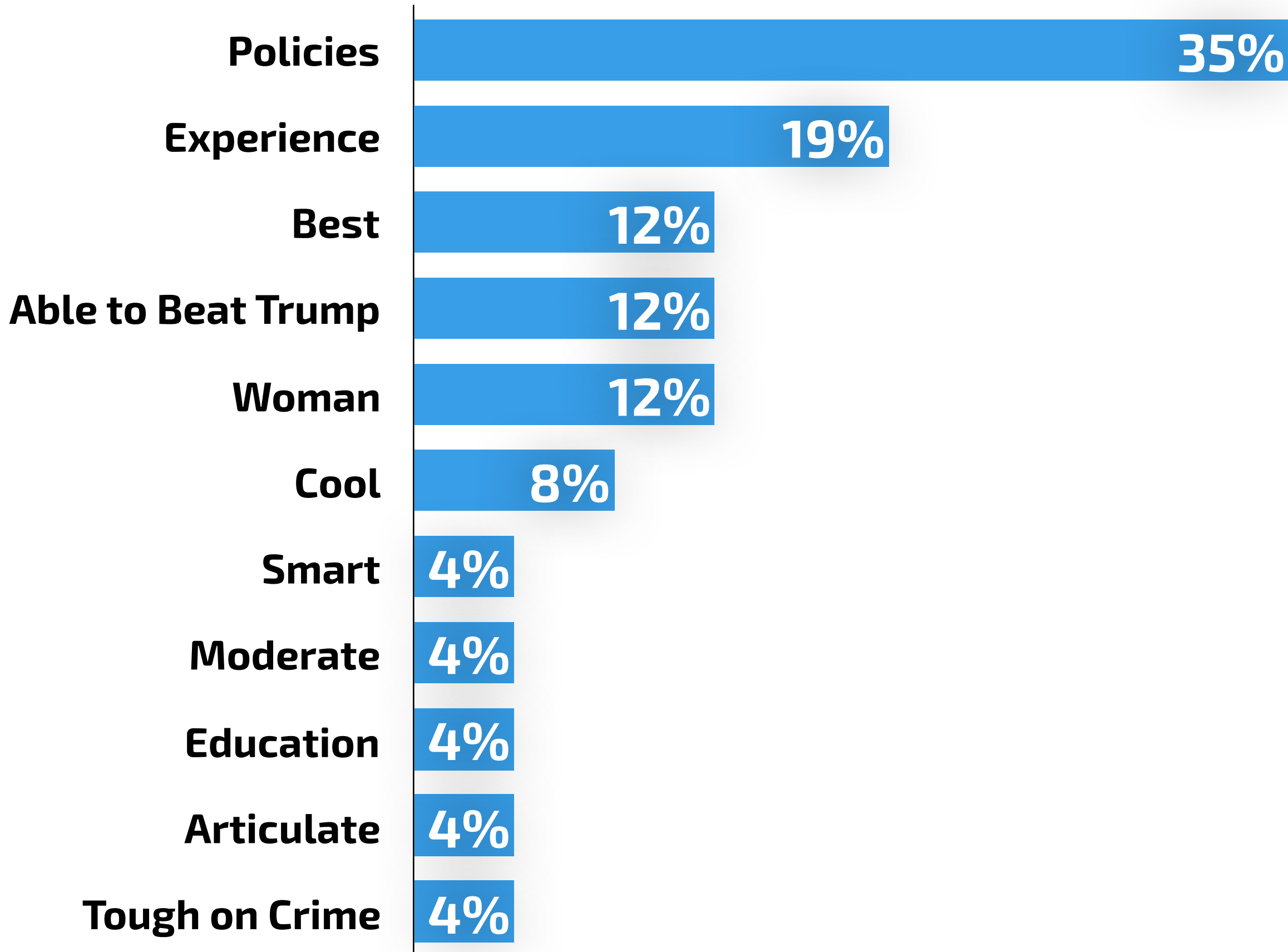
“He is smart. He's religiously knowledgeable so he can counteract those fanatics on the right. He served in the military and he is gay. He gets it.”

“ A young candidate with an open view.”

“Smart, articulate, veteran, multi-lingual, gay, young, trustworthy, compassionate”

Harris Voters Focus on Policies and Experience

Q. Why do you support this candidate? [OPEN-END]



- “Solid history of supporting good, helpful policies and opposing bad, harmful policies.”
- “smart, articulate and a good record in CA”
- “She seems like she is cool and down to earth and has good ideas”
- “Hard on criminals.”
- “I cannot explain why, but I feel she may be able to defeat Trump”
- “It's time for a female president and she is a strong Democrat”

Candidate Scorecard

	Biden	Sanders	O'Rourke	Buttigieg	Harris
Democratic Primary	26%	22%	9%	7%	6%
Favorability Among Democratic Voters	68% Favorable 13% Unfavorable	75% Favorable 13% Unfavorable	41% Favorable 10% Unfavorable	31% Favorable 7% Unfavorable	38% Favorable 11% Unfavorable
% of Democratic Voters with No Opinion	19%	12%	50%	62%	51%
Why?	1. Experienced 2. The Best 3. Able to beat Trump	1. Policies 2. Fairness 3. The Best	1. Policies 2. Youth 3. Moderate	1. Youth 2. Intelligence 3. Policies	1. Policies 2. Experience 3. The Best
	<i>"He is mature, he is progressive, and having been a Vice President he knows what the job entails in the White House."</i>	<i>"Bernie Sanders has many comprehensive and progressive plans that make sense and can move this country forward."</i>	<i>"He is willing to work with both parties to bring about the changes in policy that most Americans relate to and can agree with."</i>	<i>"Smart, articulate, veteran, multi-lingual, gay, young, trustworthy, compassionate"</i>	<i>"Fresh ideas and great political background. Attorney and highly experienced."</i>



ECHELON
INSIGHTS

