MORNING CONSULT

POLITICAL INTELLIGENCE

The 2020 U.S. Election

WEEK OF 01/06/20 – 01/12/20

A note on our new Political Intelligence...

To kick off this election year, Morning Consult is debuting a more comprehensive Political Intelligence than ever before, offering deeper insights into the 2020 race for the White House.

Political Intelligence: The 2020 U.S. Election now features more extensive data sets, including who's leading the Democratic primary among key demographics and how candidates hypothetically perform against President Trump.

Morning Consult delivers the most comprehensive data intelligence on the 2020 presidential election, interviewing more than 5,000 registered voters every day across the United States to offer data in unmatched scale and speed.

Make sure to sign up below to receive this report each week and follow @MorningConsult for the latest data and analysis on the race for the White House.

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KEY TAKEAWAYS

(Week of 1/6/20 – 1/12/20)

Why Sanders Is Electable, Too
The latest hypothetical general-election matchup finds Sen. Bernie Sanders (I-Vt.) leading President Donald Trump by 4 percentage points, 46% to 42% – doubling his lead from last week's survey. He also performs better against Trump than former Vice President Joe Biden among a number of key voting blocs, including independents and 18- to 29-year-olds. (Read more)

Booker's Second Choice Support Most Likely to Go to Biden
Twenty-four percent of Sen. Cory Booker's (D-N.J.) voters say former Biden is their second-choice candidate, followed by Sanders at 19% and Warren at 17%. Before dropping out of the race, Booker held 2% of the vote.

Billionaire Bump: Bloomberg Continues to Climb, Steyer Up in Early States
Former New York City Mayor Michael Bloomberg claims 8% of the vote share nationally, with 4% for both Gen Z and millennial voters backing him. Bloomberg is among the top candidates for both Gen X and Boomers, claiming 8% of the vote share and 11%, respectively. Twenty days before the Iowa caucuses, Tom Steyer reaches 15% in early states. He claims 15% of the vote share, 4 points behind Sanders (19%) and 12 points behind Biden (27%).

Methodology: This week's report features 41,496 surveys with registered voters, including 17,096 surveys with Democratic primary voters, conducted from January 6, 2020 through January 12, 2020. The interviews were conducted online, and the data were weighted to approximate a target sample of registered voters based on age, race/ethnicity, gender, educational attainment, and region.

THE DEMOCRATIC PRIMARY

WHO'S LEADING AMONG DEMOCRATIC PRIMARY VOTERS

THE DEMOCRATIC PRIMARY

National

CHANGE FROM LAST WEEK

Candidate	Percentage	Change
Joe Biden	29%	-2%
Bernie Sanders	23%	0%
Elizabeth Warren	14%	0%
Pete Buttigieg	8%	0%
Michael Bloomberg	8%	+1%
Andrew Yang	5%	+1%
Tom Steyer	4%	0%
Amy Klobuchar	3%	0%
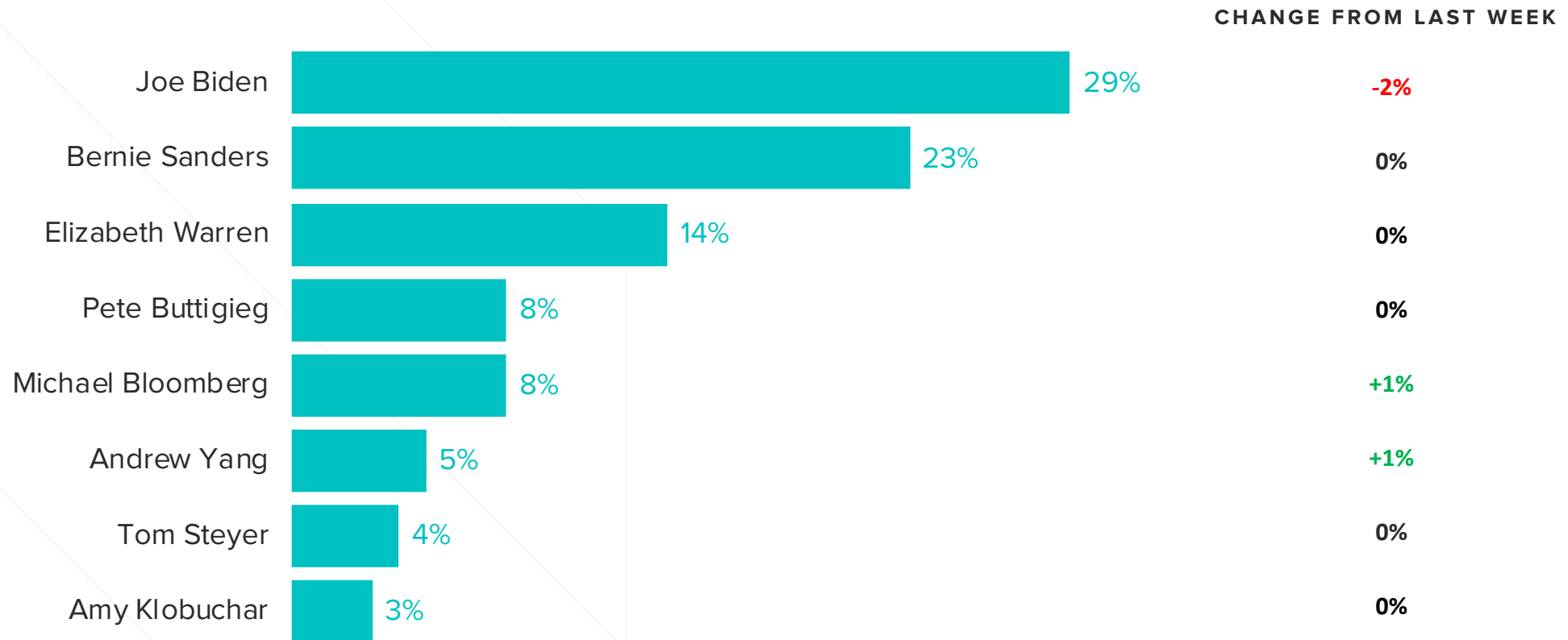
The following candidates received 2% or less of the vote: Cory Booker, Tulsi Gabbard, John Delaney, Michael Bennet, and Deval Patrick. "Someone else" received 1%.

THE DEMOCRATIC PRIMARY

Trend Over Time

Legend: Biden — Sanders — Warren — Buttigieg — Bloomberg

Biden: 29%, 32%, 29%
Sanders: 22%, 23%
Warren: 21%, 18%, 15%, 14%
Buttigieg: 5%, 10%, 8%
Bloomberg: 2%, 5%, 8%

X-axis: 9/1/2019, 9/8/2019, 9/15/2019, 9/22/2019, 9/29/2019, 10/6/2019, 10/13/2019, 10/20/2019, 10/27/2019, 11/3/2019, 11/10/2019, 11/17/2019, 11/24/2019, 12/1/2019, 12/8/2019, 12/15/2019, 12/22/2019, 12/29/2019, 1/5/2020, 1/12/2020
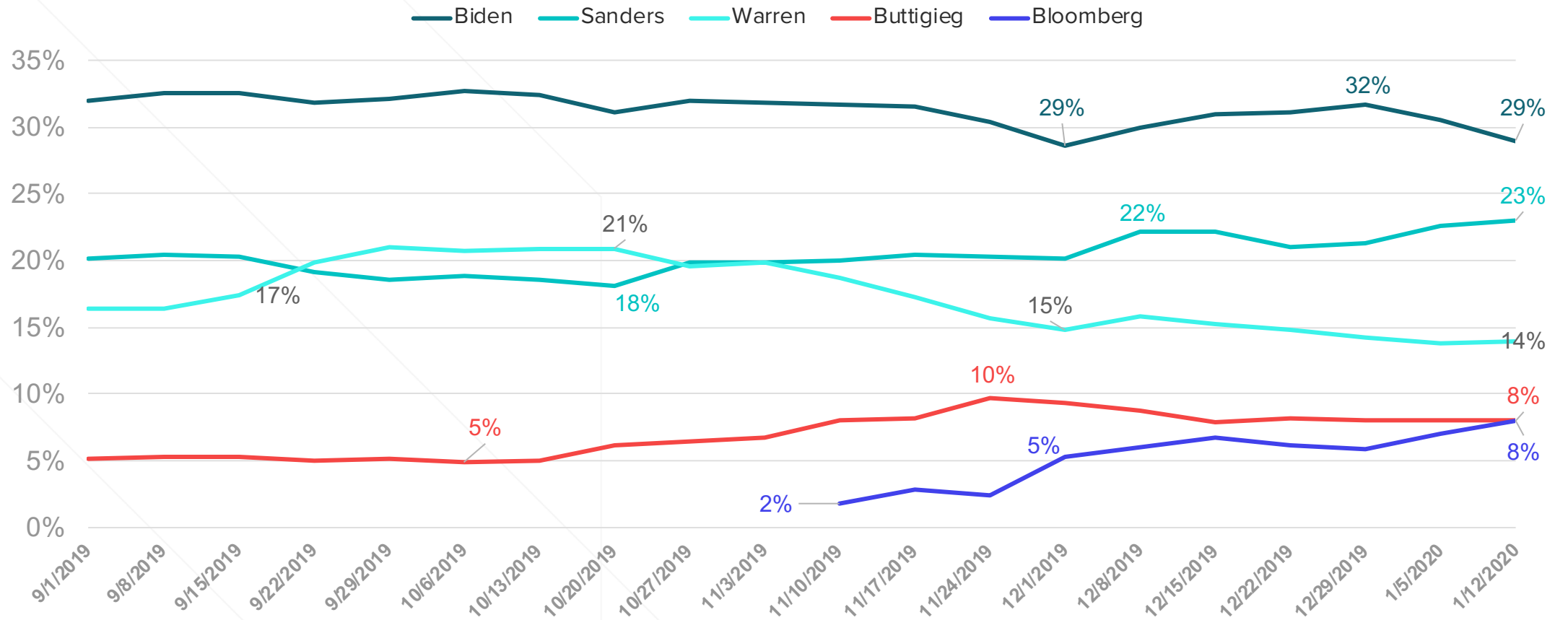
THE DEMOCRATIC PRIMARY

Key Primary States

EARLY STATES (IA, NH, SC, NV) (N=742, MOE +/-4%)	Value	% Change (W-o-W)
Joe Biden	27%	-2%
Bernie Sanders	19%	0
Tom Steyer	15%	5%
Elizabeth Warren	12%	-1%
Pete Buttigieg	9%	-2%
Michael Bloomberg	5%	2%
Andrew Yang	4%	-1%
Amy Klobuchar	3%	0
Tulsi Gabbard	3%	0

SUPER TUESDAY STATES (AL, AR, CA, CO, ME, MA, MN, NC, OK, TN, TX, UT, VT, VA) (N=5,728, MOE +/-1%)	Value	% Change (W-o-W)
Joe Biden	28%	-1%
Bernie Sanders	23%	-2%
Elizabeth Warren	15%	1%
Michael Bloomberg	9%	3%
Pete Buttigieg	7%	0
Andrew Yang	5%	1%
Tom Steyer	3%	-1%
Amy Klobuchar	3%	0
Tulsi Gabbard	2%	0

Candidates not listed received 2% or less of the vote.

THE DEMOCRATIC PRIMARY

Generation

GEN Z, 18-21
(N=915, MOE +/-3%)

	Value	% Change (W-o-W)
Bernie Sanders	45%	2%
Joe Biden	15%	-1%
Andrew Yang	12%	2%
Elizabeth Warren	11%	0
Michael Bloomberg	4%	1%
Pete Buttigieg	3%	-1%

MILLENNIAL, 22-37
(N=4,405, MOE +/-1%)

	Value	% Change (W-o-W)
Bernie Sanders	38%	-1%
Joe Biden	21%	1%
Elizabeth Warren	15%	1%
Andrew Yang	8%	1%
Pete Buttigieg	5%	0
Michael Bloomberg	5%	1%

GEN X, 38-53
(N=4,157, MOE +/-2%)

	Value	% Change (W-o-W)
Joe Biden	30%	-1%
Bernie Sanders	22%	1%
Elizabeth Warren	15%	-1%
Michael Bloomberg	8%	2%
Pete Buttigieg	7%	-1%
Andrew Yang	4%	0
Tom Steyer	3%	0

BOOMER, 54-72
(N=6,507, MOE +/-1%)

	Value	% Change (W-o-W)
Joe Biden	35%	-3%
Elizabeth Warren	14%	1%
Bernie Sanders	13%	2%
Michael Bloomberg	11%	2%
Pete Buttigieg	10%	-1%
Tom Steyer	5%	0
Amy Klobuchar	4%	0

Candidates not listed received 2% or less of the vote.

THE DEMOCRATIC PRIMARY

Race/Ethnicity

WHITE
(N=12,305, MOE +/-1%)

	Value	% Change (W-o-W)
Joe Biden	26%	-2%
Bernie Sanders	21%	-1%
Elizabeth Warren	16%	1%
Pete Buttigieg	10%	0
Michael Bloomberg	9%	2%
Andrew Yang	4%	0
Tom Steyer	4%	0
Amy Klobuchar	3%	0

BLACK
(N=3,589, MOE +/-2%)

	Value	% Change (W-o-W)
Joe Biden	41%	-1%
Bernie Sanders	26%	3%
Elizabeth Warren	10%	-1%
Michael Bloomberg	6%	0
Andrew Yang	4%	0
Tom Steyer	3%	0

HISPANIC
(N=1,983, MOE +/-2%)

	Value	% Change (W-o-W)
Bernie Sanders	33%	-3%
Joe Biden	23%	-1%
Elizabeth Warren	11%	0
Andrew Yang	8%	2%
Michael Bloomberg	8%	3%
Pete Buttigieg	5%	1%
Tom Steyer	3%	-1%

ASIAN AMERICAN
(N=414, MOE +/-5%)

	Value	% Change (W-o-W)
Joe Biden	25%	-1%
Bernie Sanders	22%	0
Andrew Yang	15%	-3%
Elizabeth Warren	14%	4%
Michael Bloomberg	9%	-1%
Pete Buttigieg	6%	1%

OTHER
(N=641, MOE +/-4%)

	Value	% Change (W-o-W)
Bernie Sanders	37%	-2%
Joe Biden	23%	1%
Elizabeth Warren	11%	-1%
Michael Bloomberg	7%	1%
Andrew Yang	7%	3%
Pete Buttigieg	5%	2%

Candidates not listed received 2% or less of the vote.

THE DEMOCRATIC PRIMARY

Political Ideology

LIBERAL
(N=9,781, MOE +/-1%)

	Value	% Change (W-o-W)
Joe Biden	26%	-1%
Bernie Sanders	26%	0
Elizabeth Warren	18%	0
Pete Buttigieg	9%	0
Michael Bloomberg	7%	2%
Andrew Yang	4%	0
Amy Klobuchar	3%	0
Tom Steyer	3%	0

MODERATE
(N=4,711, MOE +/-1%)

	Value	% Change (W-o-W)
Joe Biden	35%	-1%
Bernie Sanders	18%	0
Michael Bloomberg	12%	2%
Elizabeth Warren	10%	1%
Pete Buttigieg	7%	-1%
Andrew Yang	4%	-1%
Tom Steyer	5%	0
Amy Klobuchar	3%	0

CONSERVATIVE
(N=1,814, MOE +/-2%)

	Value	% Change (W-o-W)
Joe Biden	32%	-2%
Bernie Sanders	16%	0
Michael Bloomberg	11%	0
Elizabeth Warren	10%	3%
Tulsi Gabbard	6%	0
Pete Buttigieg	5%	0
Andrew Yang	5%	1%
Tom Steyer	4%	-1%
Amy Klobuchar	3%	0

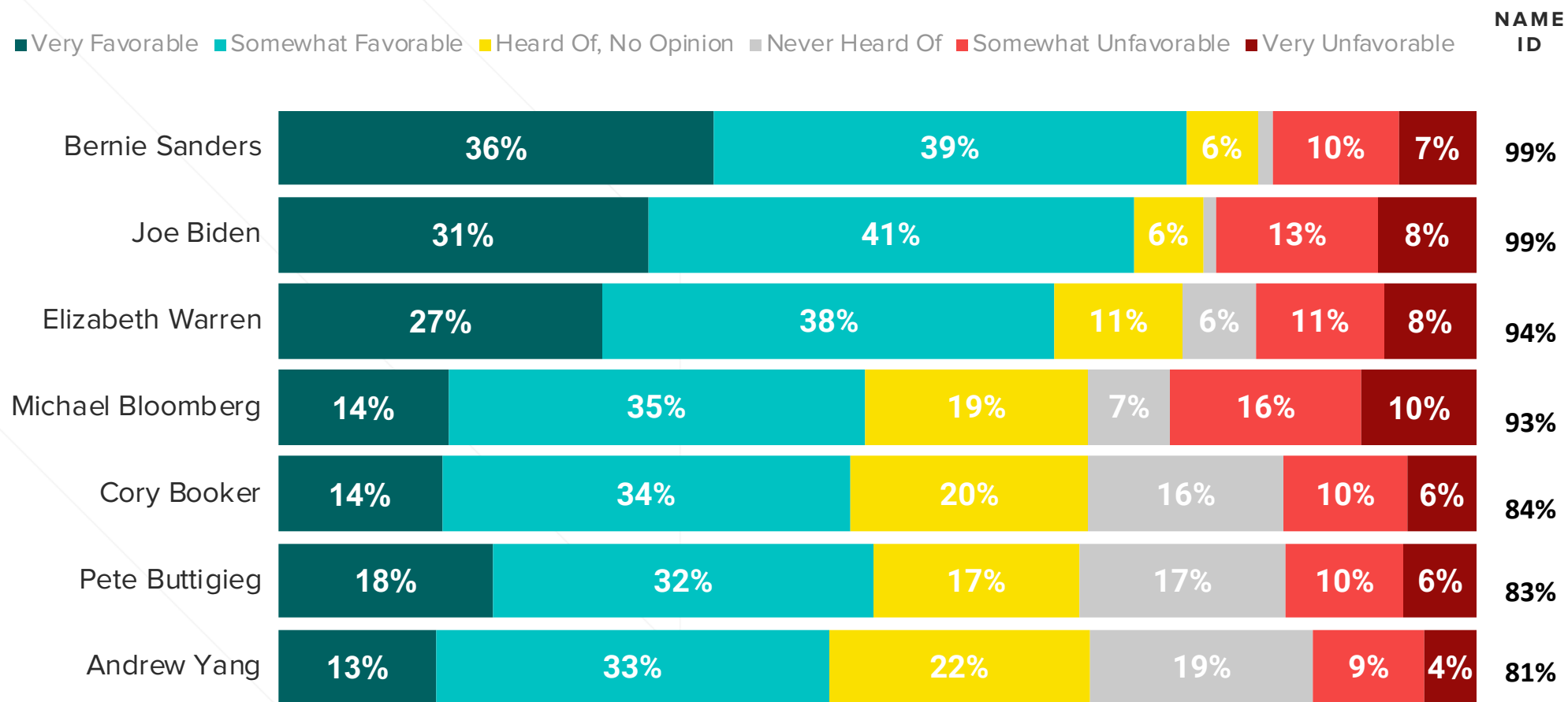Candidates not listed received 2% or less of the vote.

SECOND CHOICE

After voters registered their first choice, they were asked a follow-up about who they would choose as a second option. The results below show where the supporters for a selection of leading candidates could go next.

	Joe Biden	Bernie Sanders	Elizabeth Warren	Pete Buttigieg	Michael Bloomberg	Cory Booker
Current National Vote Share	29% ↓	23% ↓	14% ↓	8% ↓	8% ↓	2% ↓
Voters' Second Choice	29% Sanders 20% Warren 14% Bloomberg 11% Buttigieg	33% Warren 27% Biden 9% Yang	34% Sanders 23% Biden 12% Buttigieg	24% Biden 18% Warren 12% Sanders 11% Bloomberg	34% Biden 13% Buttigieg 13% Warren 12% Sanders	24% Biden 19% Sanders 17% Warren

CANDIDATE FAVORABILITY

Legend: ■ Very Favorable ■ Somewhat Favorable ■ Heard Of, No Opinion ■ Never Heard Of ■ Somewhat Unfavorable ■ Very Unfavorable

NAME ID

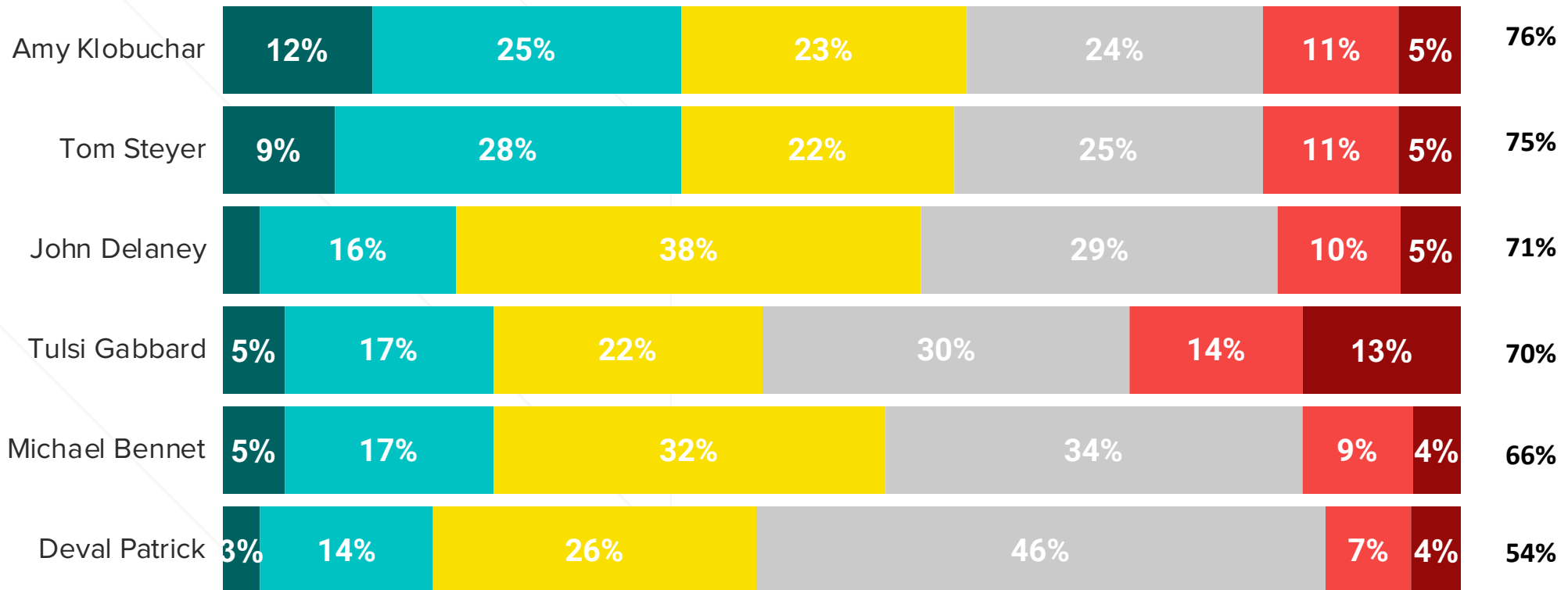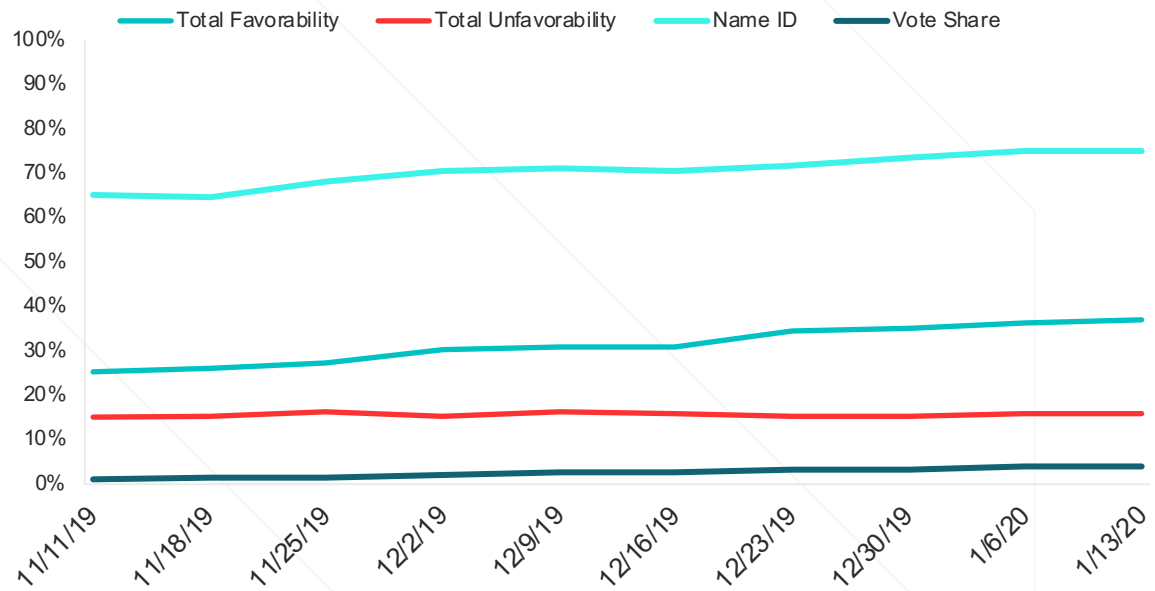| Candidate	Very Favorable	Somewhat Favorable	Heard Of, No Opinion	Never Heard Of	Somewhat Unfavorable	Very Unfavorable	Name ID
Bernie Sanders	36%	39%	6%		10%	7%	99%
Joe Biden	31%	41%	6%		13%	8%	99%
Elizabeth Warren	27%	38%	11%	6%	11%	8%	94%
Michael Bloomberg	14%	35%	19%	7%	16%	10%	93%
Cory Booker	14%	34%	20%	16%	10%	6%	84%
Pete Buttigieg	18%	32%	17%	17%	10%	6%	83%
Andrew Yang	13%	33%	22%	19%	9%	4%	81%

CANDIDATE FAVORABILITY

NAME ID

■ Very Favorable ■ Somewhat Favorable ■ Heard Of, No Opinion ■ Never Heard Of ■ Somewhat Unfavorable ■ Very Unfavorable
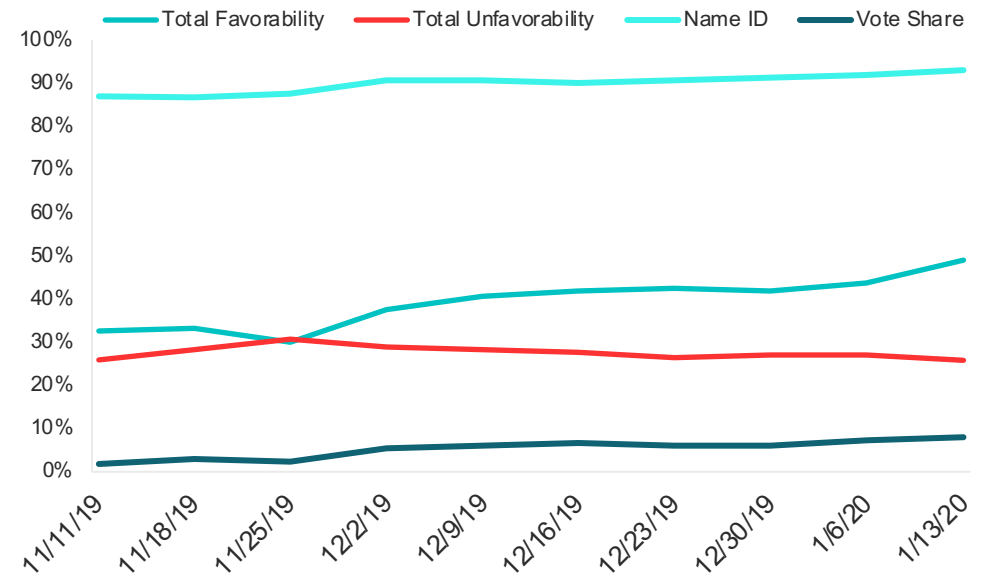
Candidate	Very Favorable	Somewhat Favorable	Heard Of, No Opinion	Never Heard Of	Somewhat Unfavorable	Very Unfavorable	Name ID
Amy Klobuchar	12%	25%	23%	24%	11%	5%	76%
Tom Steyer	9%	28%	22%	25%	11%	5%	75%
John Delaney		16%	38%	29%	10%	5%	71%
Tulsi Gabbard	5%	17%	22%	30%	14%	13%	70%
Michael Bennet	5%	17%	32%	34%	9%	4%	66%
Deval Patrick	3%	14%	26%	46%	7%	4%	54%

CANDIDATE FAVORABILITY

Steyer

Bloomberg

Legend: Total Favorability, Total Unfavorability, Name ID, Vote Share

THE GENERAL ELECTION

WHO'S LEADING AMONG REGISTERED VOTERS

THE GENERAL ELECTION

Among Registered Voters

	DEMOCRAT		DONALD TRUMP
Joe Biden	46%	13%	41%
Bernie Sanders	46%	13%	42%
Michael Bloomberg	43%	15%	42%
Elizabeth Warren	43%	15%	41%
Pete Buttigieg	42%	17%	42%
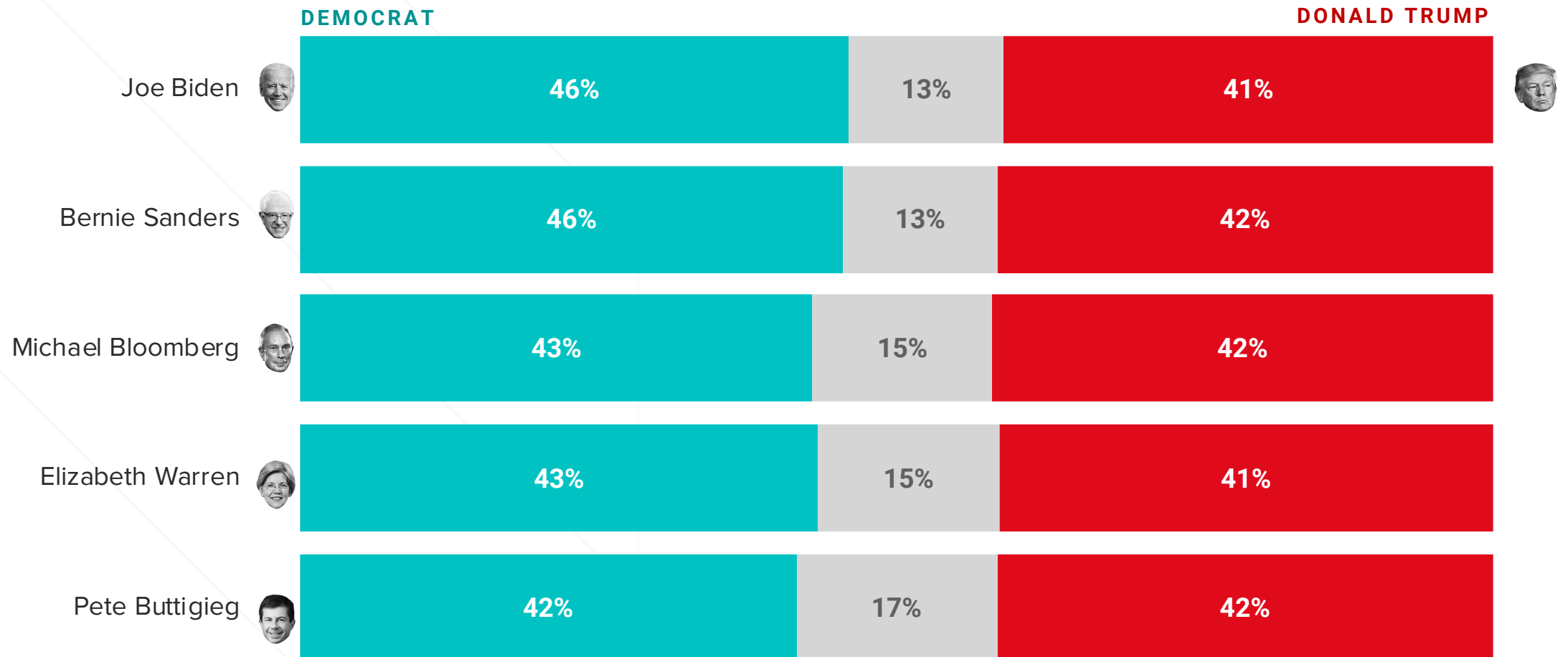
THE GENERAL ELECTION

Among Democratic Voters

	DEMOCRAT		DONALD TRUMP
Joe Biden	89%	7%	5%
Bernie Sanders	88%	7%	5%
Elizabeth Warren	86%	10%	4%
Michael Bloomberg	84%	11%	5%
Pete Buttigieg	82%	13%	6%
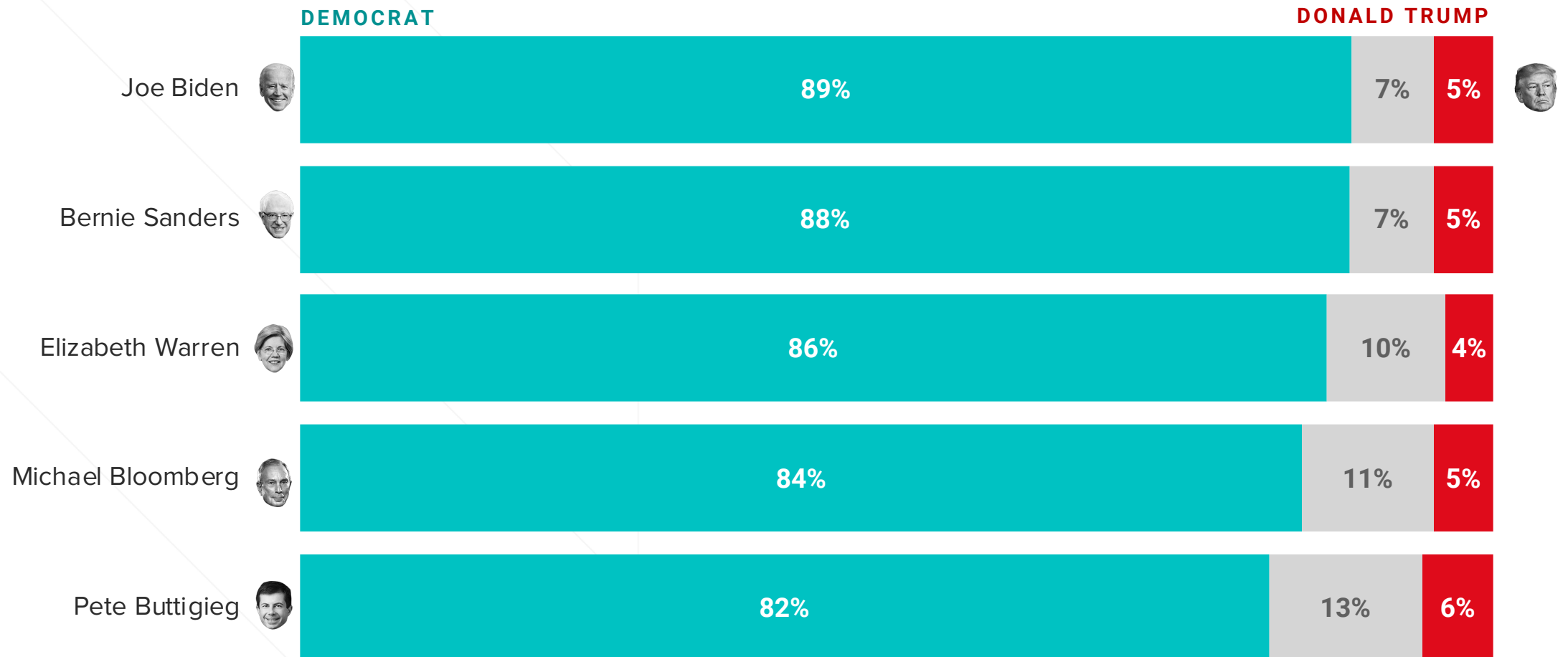
THE GENERAL ELECTION

Among Independent Voters

	DEMOCRAT		DONALD TRUMP
Bernie Sanders	42%	25%	33%
Joe Biden	38%	27%	34%
Michael Bloomberg	36%	30%	34%
Elizabeth Warren	35%	30%	35%
Pete Buttigieg	35%	31%	34%
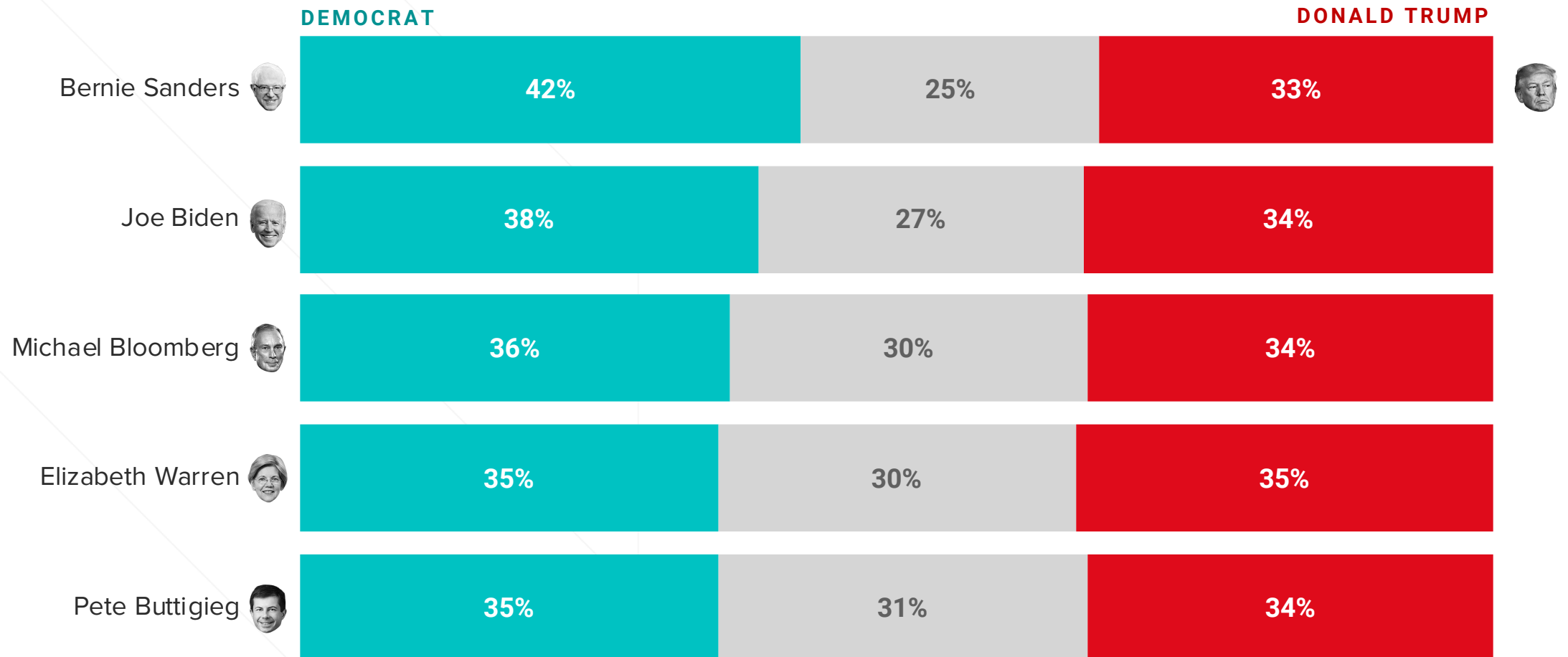
THE GENERAL ELECTION

Among Republican Voters

	DEMOCRAT		DONALD TRUMP
Joe Biden	7%	7%	86%
Michael Bloomberg	7%	7%	87%
Bernie Sanders	6%	6%	88%
Elizabeth Warren	6%	7%	87%
Pete Buttigieg	4%	8%	88%
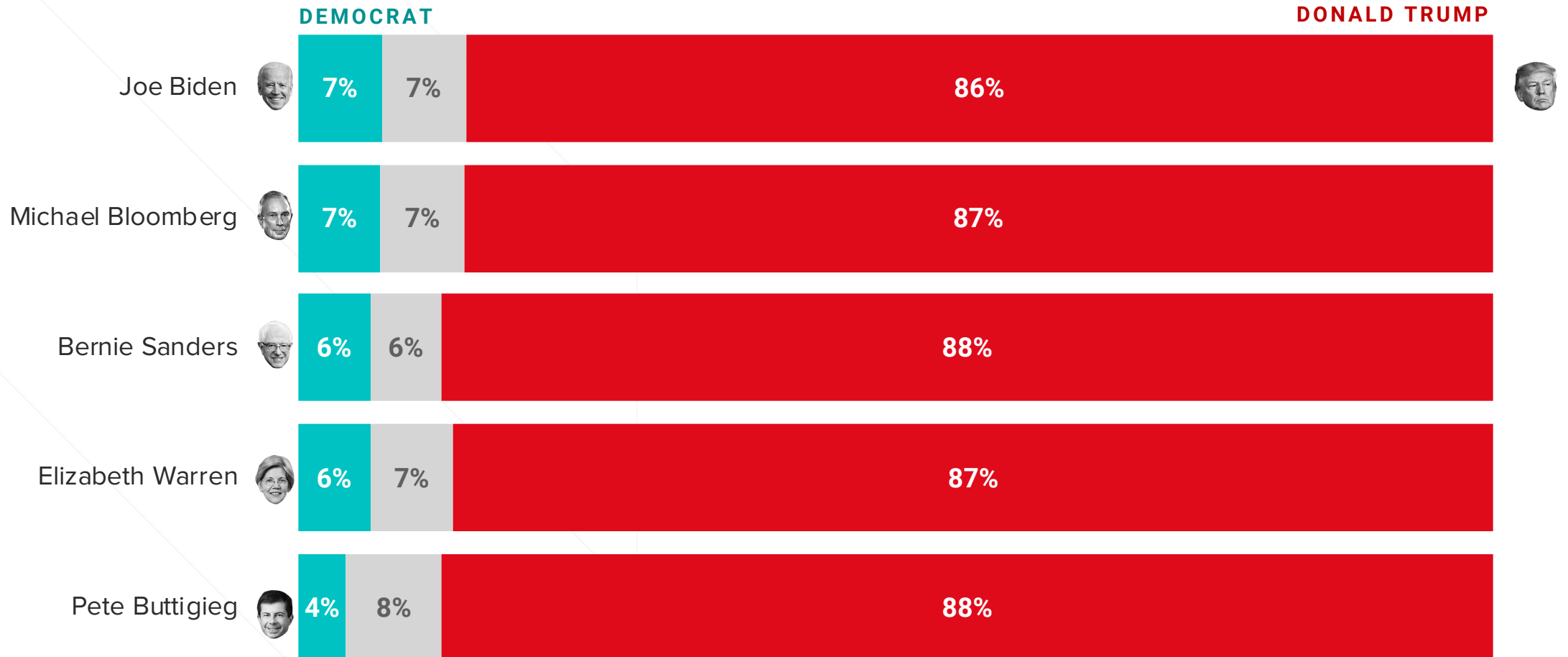
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