TO: Interested Parties

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PRIMARY VOTERS' CANDIDATE PRIORITIES

On behalf of Data for Progress, YouGov Blue fielded a survey of 1,069 US voters from April 27, 2019 to April 29, 2019. The results were weighted to be representative of the population of US voters by age, race, sex, education, US Census region, and to 2016 Presidential vote choice. The survey-level margin of error is +/-3.6 percent. Here, we report on a subset of those voters (n=475) who reported both that they were either "somewhat" or "very" likely to participate in their state's Presidential primary or caucus, and that they were planning to vote in their state's Democratic primary or caucus.

WHILE ONLY A FEW CANDIDATES HAVE MUCH SUPPORT, NONE ARE CLEARLY RULED OUT

In our survey, we sought to measure Democratic candidate selection in a way that accommodated the reality of a field consisting of almost thirty candidates, including some who have been in the race for months, others who have not formally announced but are for all intents and purposes already campaigning for the nomination. To do this, we asked voters to select as many candidates from a list as they wanted, rather than to simply choose one. Specifically, we asked respondents,

> **Thinking about the 2020 Democratic presidential [primary or caucus][1] in your state, which candidate or candidates are you considering voting for? Select all that apply.**

Voters were permitted to select as many responses as they saw fit. The list of candidates in our survey totaled twenty-six announced and likely-to-announce candidates, plus an option for "not considering any of these candidates."

Next, we asked respondents to tell us to select any candidates they would not consider voting for in their state's primary or caucus. Specifically, we asked,

> **Thinking about the 2020 Democratic nomination for president, who will you NOT consider voting for in your state's [primary or caucus]?**

That item was followed by the same list of candidates, with voters permitted to select as many candidates as they were not planning to vote for.

Perhaps unsurprisingly, the candidate selected by the highest number of Democrats is Joe Biden, whom 49 percent of Democrats are currently thinking of voting for. Notably, our national-level results suggest that Elizabeth Warren is in second place for consideration among voters. Fully 40 percent of Democrats say they are considering a vote for Warren, and just 13 percent have said they are not currently considering her. The next closest candidate, Bernie Sanders, is well within the margin of error of Senator Warren, but also has the

highest share of any candidate who Democratic primary voters are currently saying they are not planning to vote for.

Curiously, our results suggest that many candidates' popularity is a bigger problem than just name recognition. Many candidates with lower vote shares also have higher shares of voters reporting they are not considering that candidate at all (though the two quantities are not correlated in a linear fashion).[2] For example, in addition to being considered by just 1 percent of Democratic primary voters, Mike Gravel is actively not being considered by 20 percent of Democratic primary voters.

DEMOCRATIC PRIMARY VOTERS CONSIDERING CANDIDATE

NOT CONSIDERING CONSIDERING
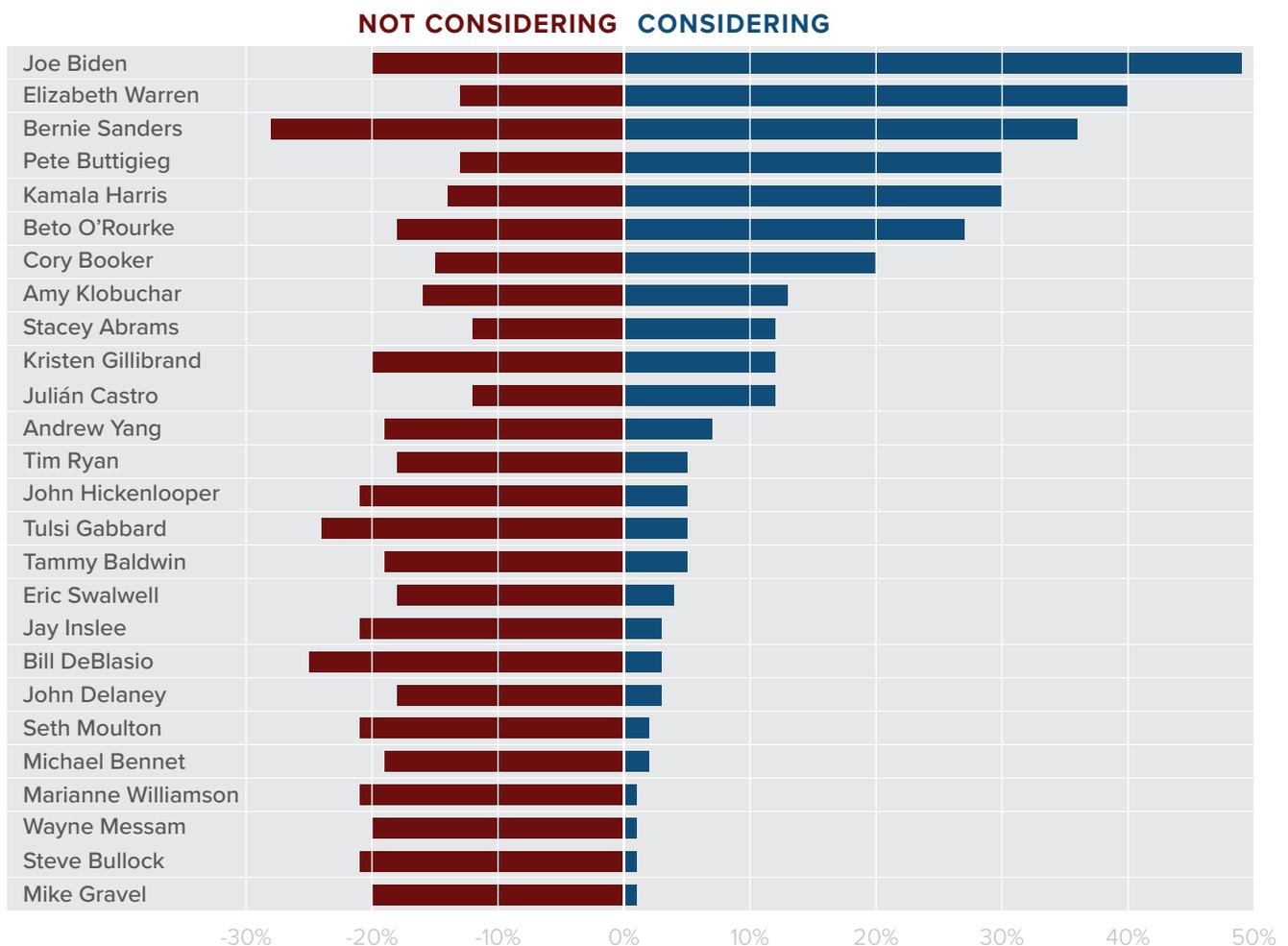
Notes : N=475 Democratic likely primary votes/caucus-goers fielded 4/26–4/29."Choice" item: Thinking about the 2020 Democratic presidential [primary or caucus], which candidate or candidates are you considering voting for? Select all that apply. "Non Choice" item: Thinking about the 2020 Democratic nomination for president, who will you NOT consider voting for in your state's [primary or caucus]?

## AMONG THOSE WITH ORDERED PREFERENCES, THERE ARE A FEW CLEAR FRONTRUNNERS

Next, voters were asked to rank candidates who they said they were considering voting for from "most preferred" to "least preferred." Among those who have an ordinal preference, a few clear frontrunners emerged: Vice President Joe Biden is the first choice for 33 percent of voters who ranked their preferred candidate, Senator Bernie Sanders is for 17 percent of primary voters, Senator Elizabeth Warren for 16 percent of voters, South Bend Mayor Pete Buttigieg for 9 percent of voters, Senator Kamala Harris for 7 percent of voters, Representative Beto O'Rourke for 4 percent, and all other candidates amounted to about 13 percent of first-choice rankings for Democratic primary voters.

The following plot demonstrates the flow of preferences for Democratic primary voters who reported having a preferred set of candidates, and who ranked those candidates. This flow is presented as a thought exercise to suggest whose voters would move to which other candidates should one of those candidates exit the race. For example, the self-reported candidate rankings by primary voters suggest that almost a third of Biden and Warren supporters do not have a second choice, as with about one quarter of Sanders supporters. Sanders would pick up the most Biden supporters were Biden to exit the race, and Warren would gain a substantial share of Sanders supporters were he to exit the race.

Notably, even after several rounds of theoretical candidate ranking, the top five essentially remains a race between Biden, Buttigieg, Harris, O'Rourke, Sanders, and Warren. Additionally, over half of voters who chose to rank their preferred candidates had at least three candidates in their ranking, indicating that Democratic primary voters have many satisfactory options they are choosing among.

2020 PRESIDENTIAL CANDIDATE VOTE CHOICE
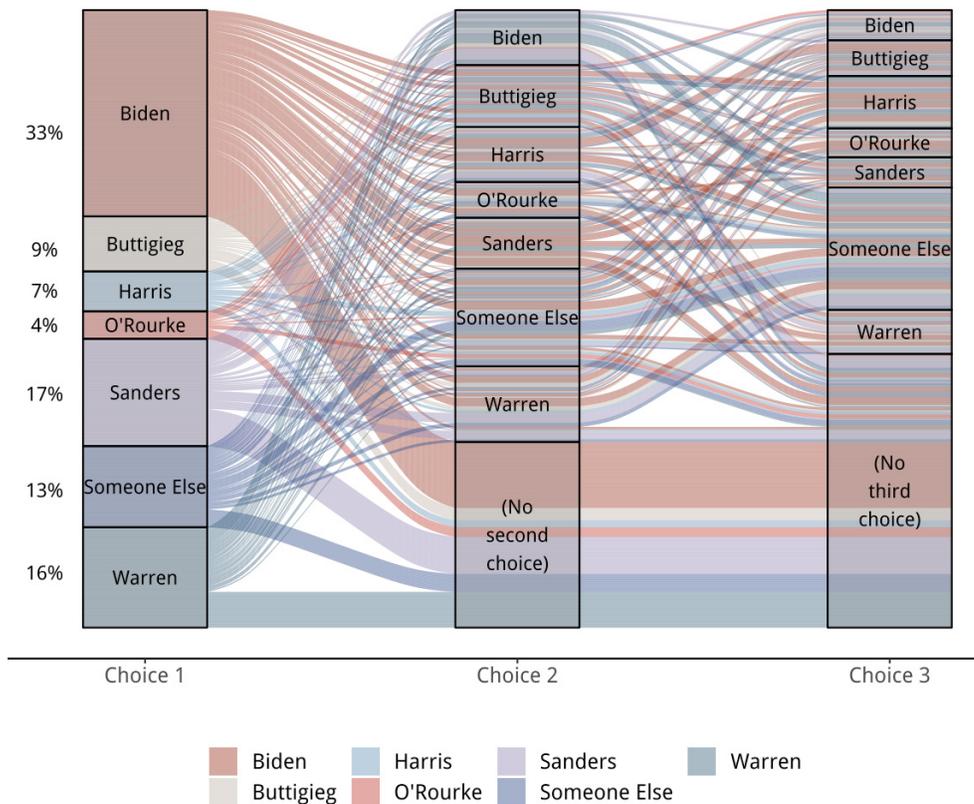
Using this voters' rankings, we can extrapolate to what might happen if certain candidates dropped out of the race. For example, if Sanders were to drop out, this would imply a new standing of Biden at 35, Buttigieg at 9, Harris at 8, O'Rourke at 4, Warren at 19, other candidates at 14, and 12 percent of voters up for grabs. If Biden were to drop out, this would imply Buttigieg at 12, Harris at 9, O'Rourke at 7, Sanders at 21, Warren at 19, other candidates at 16, and 16 percent of voters up for grabs.

SUPPORTERS OF FRONTRUNNER CANDIDATES ALSO HAVE THE MOST ALTERNATIVES IN MIND

Across Democratic primary voters who chose to rank their preferred candidates, the average number of candidates being considered by Democratic primary voters was roughly three, slightly below three among voters who preferred less popular candidates, and slightly above three among voters who preferred more popular candidates. Among the top ten candidates in our sample the average number of candidates voters were considering was 3.3, down to about 2.8 among voters who preferred the bottom ten candidates on the list.

One possibility for this general trend is that candidates with lower levels of support have, at least partially by definition, less mass appeal, and thus have cultivated personal constituencies who are not really considering other candidates besides that person. Another possibility is that candidates with broader appeal, also at least partially by definition, attract voters who do not necessarily strictly prefer one type of candidate. Yet another possibility is that successful candidates pick up primary voters who discriminate carefully, holding ordinal preferences among many candidates. Our data does not adjudicate between these hypotheses. Here, we simply show that Democratic primary voters are still by and large considering a broad array of possibilities.

CANDIDATE	AVERAGE COUNT OF ALTERNATES
Gillibrand	2.2
Castro	2.5
Booker	3.2
Sanders	3.3
O'Rourke	3.4
Buttigieg	3.4
Biden	3.6
Harris	4.1
Ryan	4.2
Warren	4.4

WHAT DO DEMOCRATIC PRIMARY VOTERS PRIORITIZE?

In addition to asking voters for their candidate preferences, we wanted to know what tangible characteristics of candidates voters find appealing. In a primary of this kind, these characteristics likely include not just policy positions, but attributes like a candidate's age, sex, or race. A few major policy positions, like a candidate's stance on Medicare for All and their past vote on the Iraq war, are thought to be important considerations for primary voters.

To investigate the importance of these characteristics, we designed an item in which voters would allocate scarce resources among a competing set of candidate characteristics to see which they valued most. We asked primary voters to allocate 100 theoretical "points" among a series of competing candidate attributes and policy positions. Those attributes and positions included the key policies being discussed in the context of the 2020 election, and on candidate attributes that are generally known to be relevant to Democratic primary voters. Respondents would see a list of these attributes and

policies presented in a randomized order, and were given 100 "points" they could use to rate the importance of each of those attributes or policies. More "points" given to that candidate attribute or policy position would indicate more weight being given to that attribute or policy in vote choice.

Specifically, we allowed voters to choose among

► Candidate connects with voters

► Candidate did not support the Iraq War

► Candidate has foreign policy experience

► Candidate has held executive office, such as mayor or governor

► Candidate has held legislative office, such as Senator or Representative

► Candidate is a charismatic speaker

► Candidate is a person of color

► Candidate is a woman

► Candidate is able to connect with rural America

► Candidate is relatively young

► Candidate is willing to compromise with Republicans in Congress

► Candidate supports abolishing Immigration and Customs Enforcement (ICE)

► Candidate supports abortion rights

► Candidate supports action on climate change

► Candidate supports increasing taxes on the rich

► Candidate supports Medicare for All

► Candidate supports raising the minimum wage to $15/hour

AVERAGE POINTS ALLOCATION | DEMOCRATIC PRIMARY VOTERS
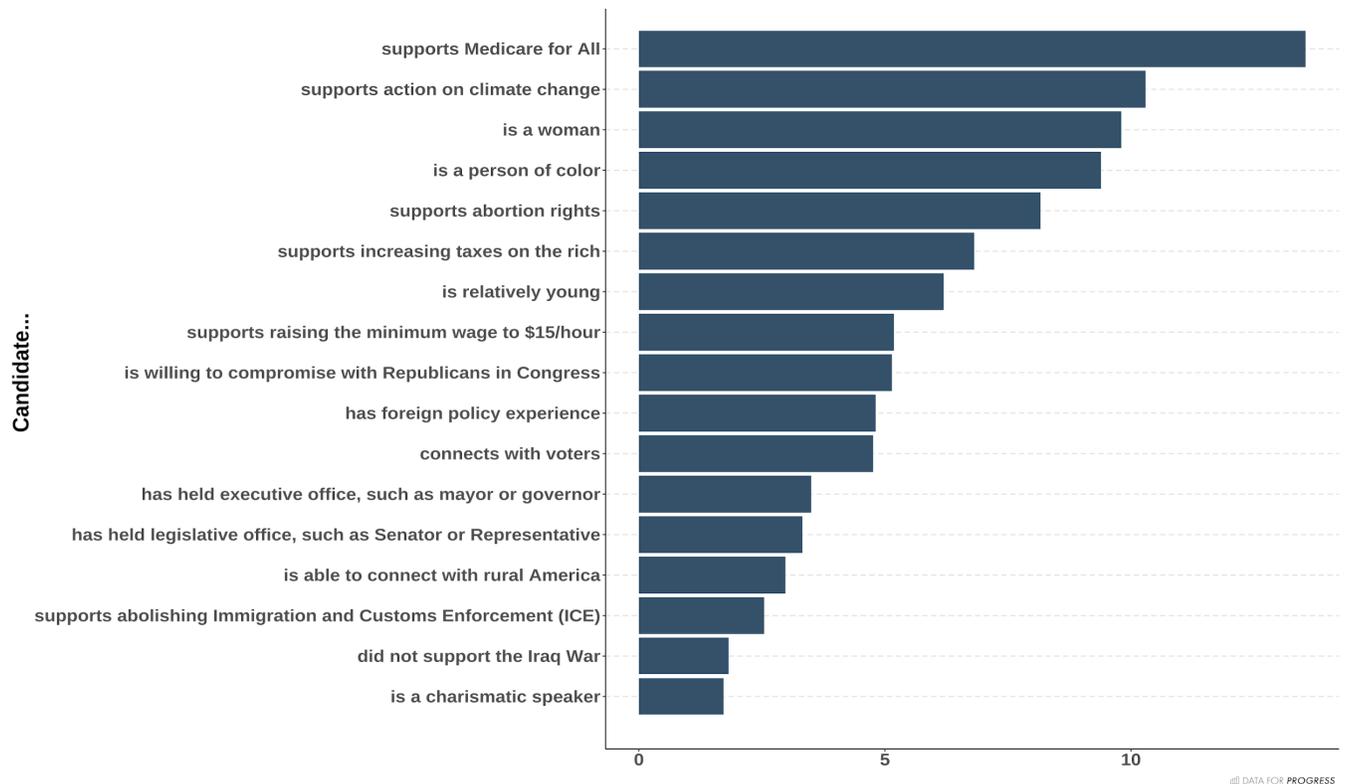
	VOTERS WHO ARE CONSIDERING...				VOTERS WHO IDENTIFY AS...	
	Biden	Harris	Sanders	Warren	Moderate	Very liberal
Candidate connects with voters	8	9	6	12	9	12
Candidate did not support the Iraq War	17	16	14	16	8	17
Candidate has foreign policy experience	7	10	12	10	3	9
Candidate has held executive office, such as mayor or governor	11	12	15	13	10	13
Candidate has held legislative office, such as Senator or Representative	10	13	16	11	12	11
Candidate is a charismatic speaker	16	16	17	16	16	15
Candidate is a person of color	4	4	11	7	2	2
Candidate is a woman	5	1	7	4	4	3
Candidate is able to connect with rural American	15	11	13	15	5	14
Candidate is relatively young	13	3	8	6	6	7
Candidate is willing to compromise with Republicans in Congress	9	15	10	14	1	5
Candidate supports abolishing Immigration and Customs Enforcement (ICE)	14	13	9	9	17	16
Candidate supports abortion rights	3	5	4	3	11	8
Candidate supports action on climate change	2	6	2	1	14	4
Candidate supports increasing taxes on the rich	6	7	3	5	13	6
Candidate supports Medicare for All	1	2	1	2	7	1
Candidate supports raising the minimum wage to $15/hour	12	8	5	8	14	10

By a clear margin, voters said they prioritized candidates who support Medicare for All and who support action on climate change. Shortly behind that were personal attributes such as "is a woman" and "is a person of color," though attributes and characteristics two through five were essentially statistically tied. Willingness to compromise with Republicans was of middling importance, and charisma was least important.

However, we caution that these rankings are not presently a clear indicator of candidate choice. The general rankings voters provided ultimately did not differ greatly across voters who support candidates who are thought to be very different. The following table represents the self-reported allocations of voters who presently support Biden, Harris, and Warren, who identify as ideologically "moderate" and who identify as ideologically "very liberal." Blue bands indicate sets of rankings that are very similar across groups, within two rankings of each other across all candidates or both ideological groups, and red bars represent items on which the candidate supporters or ideological groups are a total of more than five ranks apart.

For example, while we see that most voter groups no longer prioritize a candidate's Iraq War vote, Biden and Warren voters are roughly equivalent in their prioritizing of Medicare for All, climate change, and abortion rights. Moderates and very liberal voters are within one rank of each other on about a third of the items, with moderates and very liberal voters both prioritizing a candidate being a woman and a candidate being a person of color highly. Notably, Medicare for All is an important issue for Biden supporters, which may cause him to struggle since he does not support the policy. Liberal voters prioritize Medicare for All and descriptive representation.

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CONCLUSION

While there are a few frontrunners presently, voters are prepared to vote for several possible options. Those potential options are not clearly defined by ideological similarity. Ultimately, while all of the lower-tier candidates face an uphill climb, no one has been clearly fully written off by voters. The policy and personal differences that differentiate candidates among Democratic primary voters are slight, and it is wrong to say voters who currently favor one candidate or the other clearly have divergent policy and personal preferences.

ENDNOTES

1. Wording for this item was piped into the text seen by respondents based on their state of voter registration. For states whose primary or caucus regime is still in flux, we relied on historical precedent for determining whether the state would hold a Presidential primary or caucus.

2. Specifically, $\beta = 0.91$ +/- 0.65, $p < 0.17$ for a simple OLS model regressing "percent considering" on "percent not considering."