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Primaries, polls, and results

Super Tuesday special edition

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Super Tuesday showed us that you should never underestimate the power of endorsements, electability, and momentum on voters, even in this new era of seemingly unlimited targeted advertising, digital outreach, and endless Twitter conversation. With record turnout in many states, we saw former Vice President Joe Biden and Sen. Bernie Sanders cement themselves as the clear frontrunners in the Democratic primary race.

Biden's comeback from a slow start continued after his decisive victory in South Carolina. He swept through the Southern Super Tuesday states and also surprised in states such as Sen. Elizabeth Warren's Massachusetts, as well as in Minnesota with the help of Sen. Amy Klobuchar's late endorsement. Former New York City Mayor Michael Bloomberg fell flat despite betting all his chips on Super Tuesday, and suspended his campaign the Wednesday after. Sen. Elizabeth Warren also suspended her campaign Thursday, declining to endorse either Sanders or Biden.

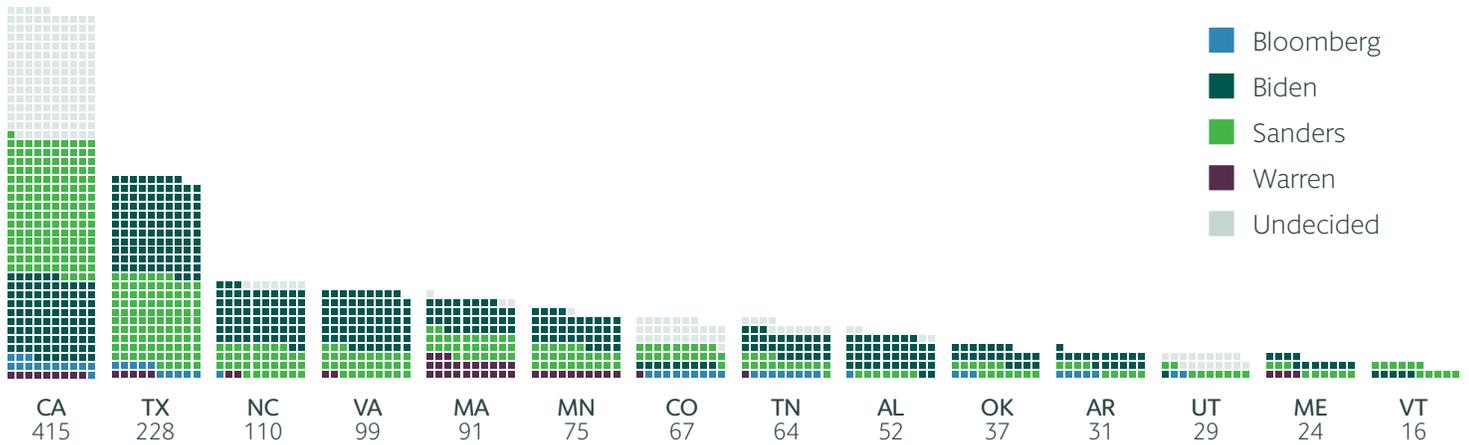
Sanders and Biden will have similar but different challenges moving forward. Biden will need to maintain consistency and keep his momentum moving forward into the next round of critical primary states. He will need to find a way to unite his messaging to continue rallying his own supporters while winning over those that bemoan him as the "nothing new" candidate. Sanders, in turn, will have to find a way to expand his base of younger, independent voters to find a path for success in must-win states like Michigan. Known for his consistent messaging, is Sanders willing to change to win more support?

Whoever emerges as the nominee will need to be prepared for a well-funded and sophisticated Trump re-election campaign that has spent four years organizing and preparing its messaging for this fall.

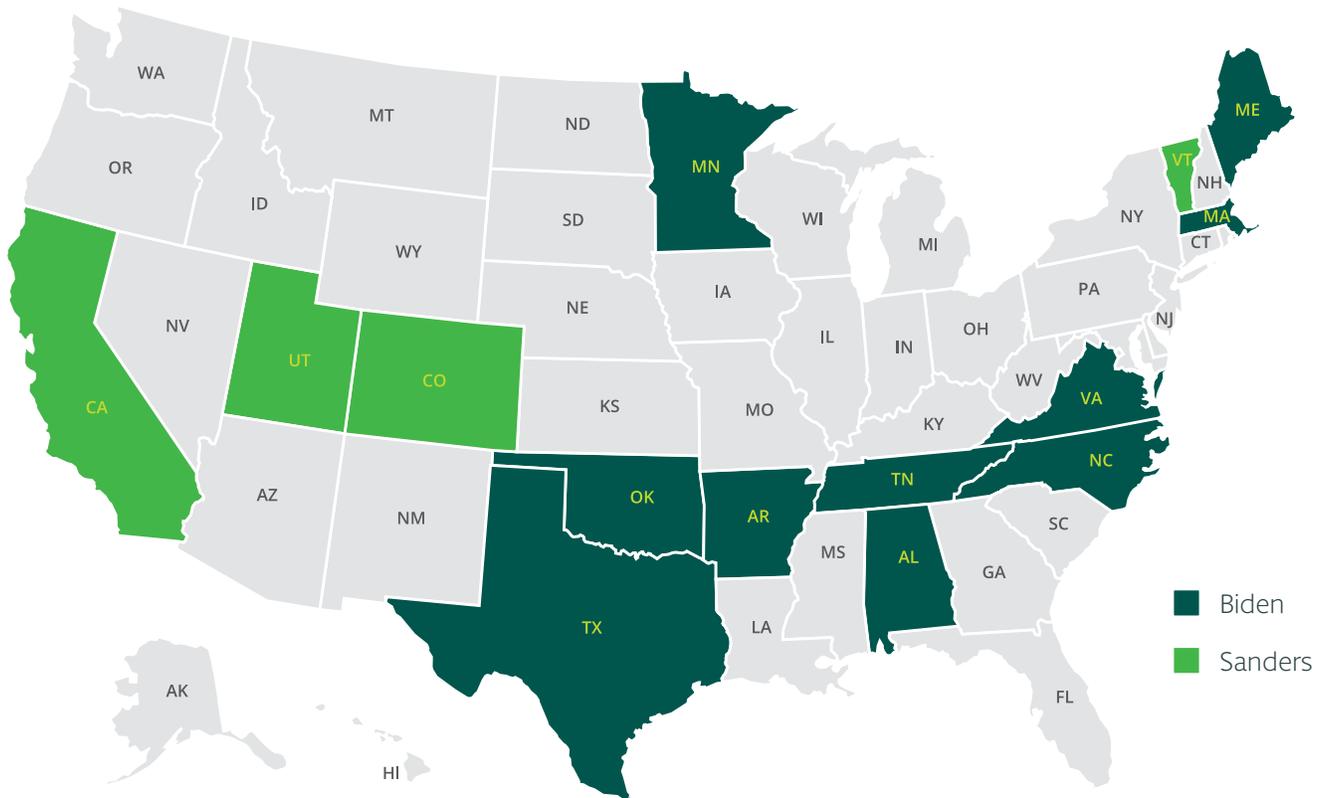
(Stay tuned for more from Hogan Lovells on the industries and sectors that stand to be most impacted by either a Biden or Sanders presidency, or with four more years of Trump. For more of our election materials [click here](#).)

Super Tuesday states

Number of Delegates won on Super Tuesday



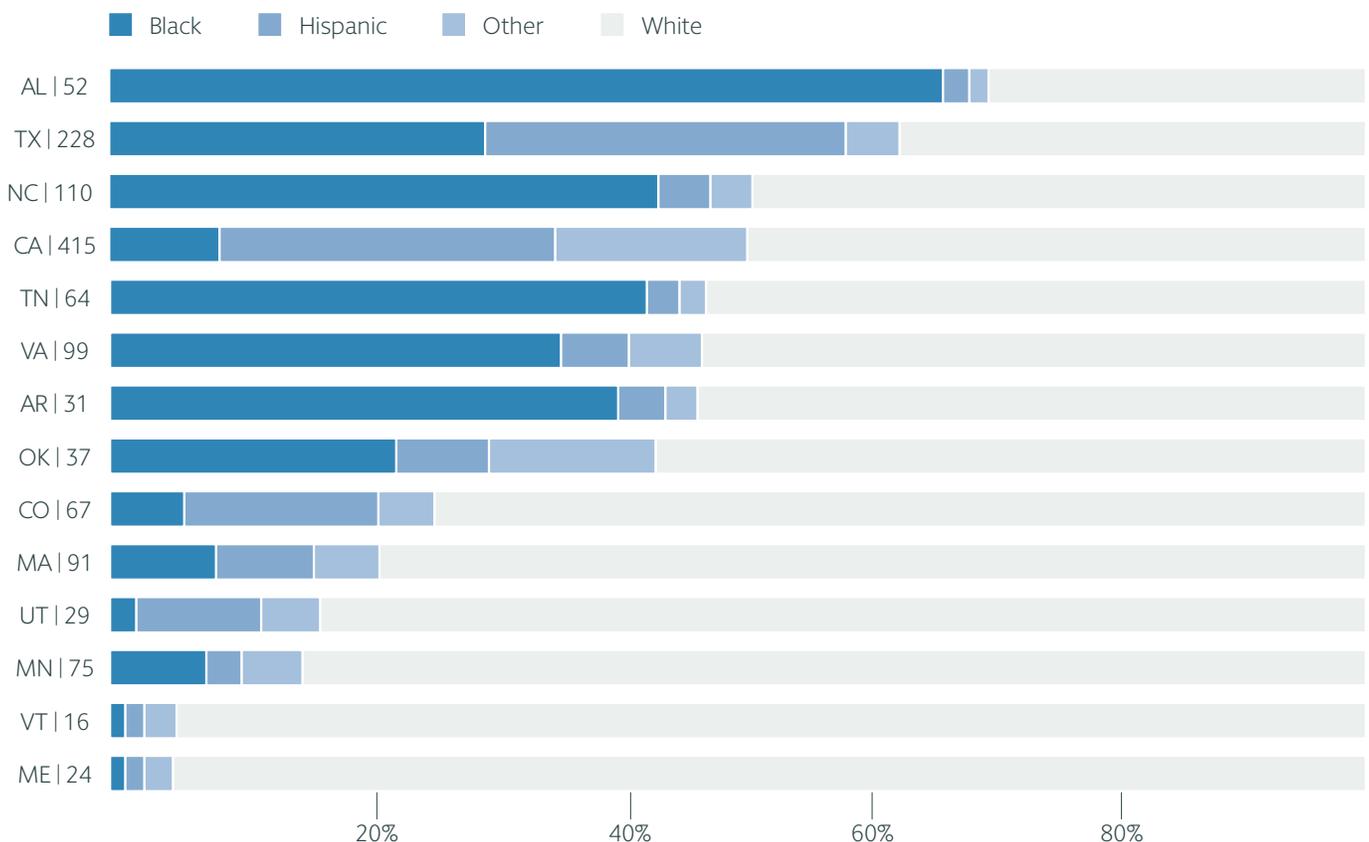
Source: NPR - March 5, 12:00 p.m.



Demographics of Democratic voters in Super Tuesday states

Super Tuesday states are diverse in both demographics and political ideology. Exit polls showed that younger voters largely failed to turn out for these primaries, representing a majority of Sanders' base. Only one in eight voters on Tuesday were between 18 and 29 years old. Though Sanders generally underperformed, his concentration on the large populations of Hispanic voters paid off in states like California, where he leads in Latino voters by 30 points, and in Texas where he won 45% of Latino voters.

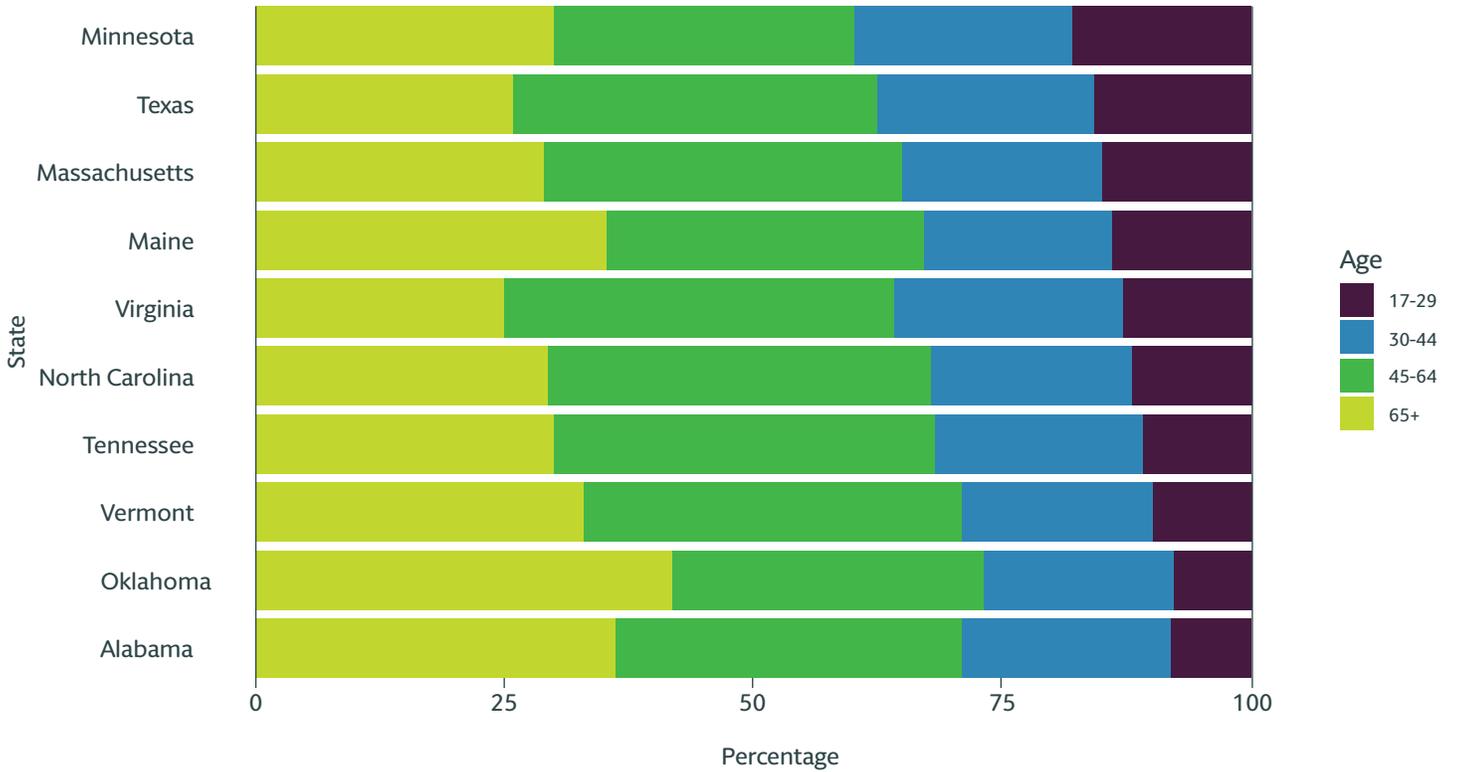
The African-American vote helped propel Biden to victory in several states. Biden won support from about 7 in 10 black voters in Virginia and Alabama and over half of black voters in Tennessee and North Carolina. Biden also greatly benefited from the two-thirds of voters 45 or older that showed up at the polls. In states like Texas, Biden's ability to capture large suburban voters overpowered any gains that Sanders was able to make with young Latino voters. Virginia, Tennessee, and Texas, all states that Biden won, saw sharp increases in turnout compared to 2016.



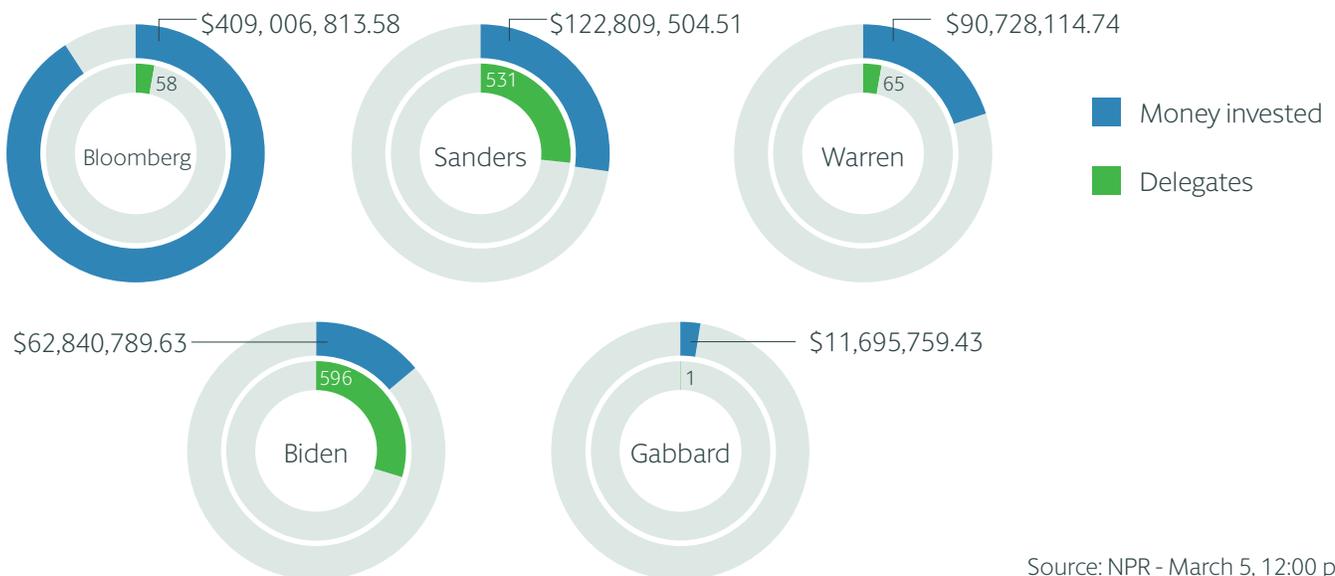
Source: Racial and ethnic breakdowns come from New York Times estimates of Democratic voters in the 2016 presidential general election based on data from the Roper Center, the U.S. Census Bureau and Dave Leip's Atlas of U.S. Presidential Elections

Age composition of the primary electorate

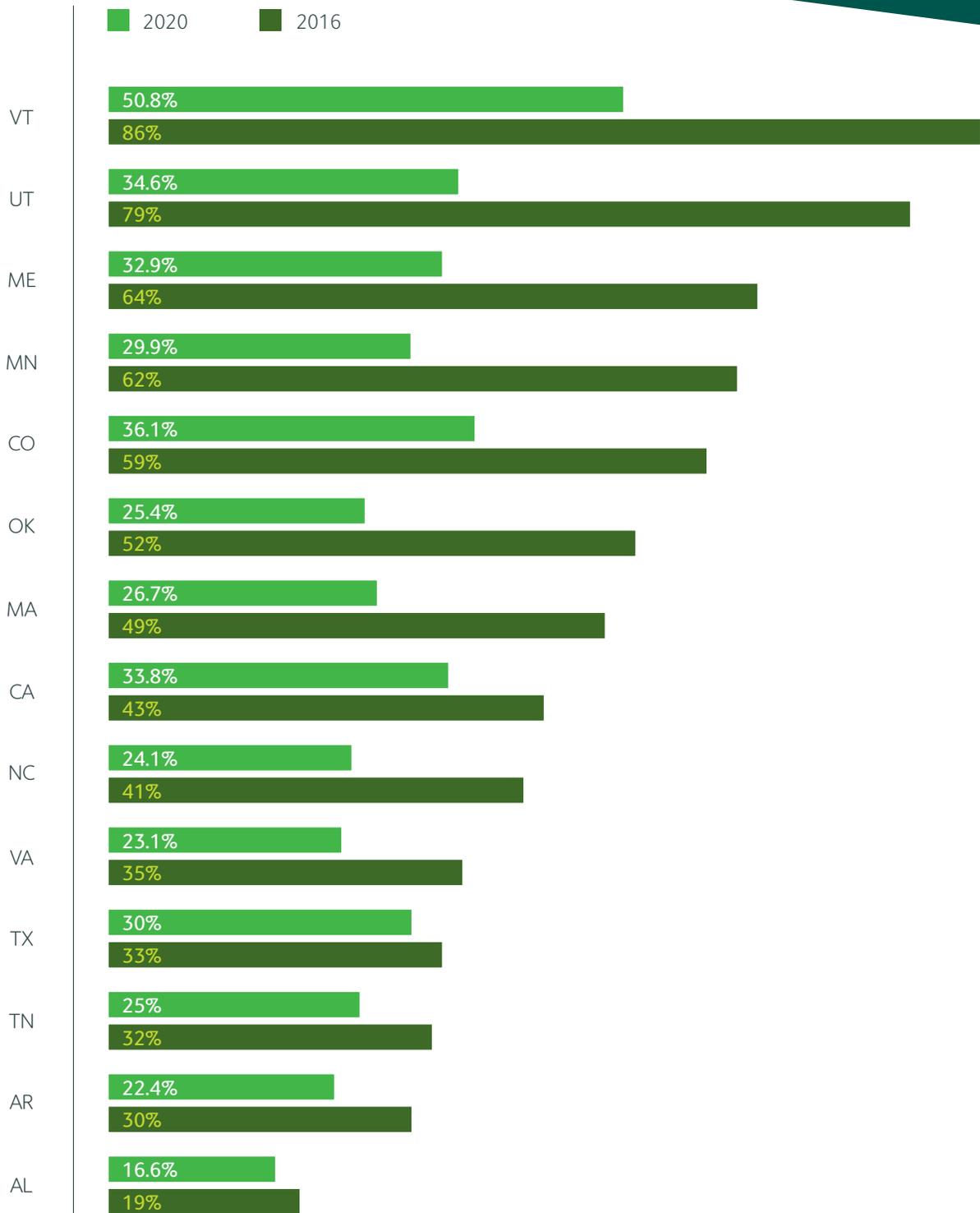
Composition of Democratic primary voters by age group, from exit polls in available Super Tuesday states



Money spent vs. delegates won



Bernie Sanders performance: 2020 vs. 2016



2020 Percentages Source: NPR - March 5, 12:00 p.m.

Delegates awarded

State by state



Date State	Total	Undecided	Bloomberg	Biden	Buttigieg	Klobuchar	Sanders	Warren
Feb. 3 Iowa	41	0	0	6	14	1	12	8
Feb. 11 New Hampshire	24	0	0	0	9	6	9	0
Feb. 22 Nevada	36	0	0	9	3	0	24	0
Feb. 29 South Carolina	54	0	0	39	0	0	15	0
March 3 California	415	144	14	93	0	0	155	9
March 3 Texas	228	0	10	111	0	0	102	5
March 3 North Carolina	110	7	1	65	0	0	35	2
March 3 Virginia	99	0	0	66	0	0	31	2
March 3 Massachusetts	91	3	0	36	0	0	29	23
March 3 Minnesota	75	1	0	38	0	0	26	10
March 3 Colorado	67	28	9	9	0	0	20	1
March 3 Tennessee	64	11	8	29	0	0	15	1
March 3 Alabama	52	4	1	40	0	0	7	0
March 3 Oklahoma	37	0	3	21	0	0	13	0
March 3 Arkansas	31	0	5	17	0	0	9	0
March 3 Utah	29	17	2	1	0	0	9	0
March 3 Maine	24	0	0	11	0	0	9	4
March 3 Vermont	16	0	0	5	0	0	11	0
March 3 American Samoa	6	0	5	0	0	0	0	0
Totals	1512	215	58	596	26	7	531	65

Source: NPR - March 5, 12:00 p.m.

Super Tuesday popular vote by percentage

State by state



State	2016 winner	Bloomberg	Biden	Sanders	Warren
California	Clinton	14.1%	25.1%	33.8%	12.2%
Texas	Clinton	14.4%	34.5%	30%	11.4%
North Carolina	Clinton	13%	43%	24.1%	10.5%
Virginia	Clinton	9.8%	53.2%	23.1%	10.8%
Massachusetts	Clinton	11.8%	33.6%	26.7%	21.4%
Minnesota	Sanders	8.3%	38.6%	29.9%	15.4%
Colorado	Sanders	20.5%	23.6%	36.1%	17.3%
Tennessee	Clinton	15.4%	41.7%	25%	10.4%
Alabama	Clinton	11.7%	63.3%	16.6%	5.7%
Oklahoma	Sanders	13.9%	38.7%	25.4%	13.4%
Arkansas	Clinton	16.7%	40.5%	22.4%	10%
Utah	Sanders	16.8%	17.4%	34.6%	15.5%
Maine	Sanders	12%	34.1%	32.9%	15.7%
Vermont	Sanders	9.4%	22%	50.8%	12.6%
American Samoa	Clinton	49.9%	8.8%	10.5%	1.4%

Source: NPR - March 5, 12:00 p.m.

Downballot primaries of note

House race



TX-12 | Solid Republican

Kay Granger (R)

The member of the House Appropriations Committee found herself in a down-to-the-minute fight after the Club for Growth spent millions in backing her primary opponent Colleyville Councilman Chris Putnam. The primary set alarms for many in the House Republican leadership at the possibility of losing a top appropriator and one of only 11 GOP women left in the House. Even with the endorsement of President Trump, this race stayed as a toss-up to the end and a test whether Tea Party activists can gain support in the Trump era. Granger prevailed, winning with 57.9% to 42.1%.

TX-28 | Solid Democratic

Henry Cuellar (D)

Conservative Blue Dog Incumbent Rep. Henry Cuellar staved off a serious primary challenge from the left by immigration attorney Jessica Cisneros. Cisneros received several endorsements, including Sen. Elizabeth Warren, Sen. Bernie Sanders, and Rep. Alexandria Ocasio-Cortez. Though Cisneros received substantial funding from progressive donors, Cuellar had a clear and massive advantage of money on hand. Cuellar won 51.8% to 48.2%.

TX-22 | Open Seat - Toss Up

Rep. Pete Olson (R)

Rep. Pete Olson's seat was already vulnerable, but his retirement escalated it on the Democrats' takeover list. The southwest Houston suburbs are a widely diverse mix that voted for President Trump by only eight points. It is also among the most highly educated districts in the state. Former Sen. Kirsten Gillibrand's (D) aide, Sri Kulkarni, was heavily funded and won the Democratic primary with 53.1% of the vote. Fifteen Republicans were vying for the seat, including Neil Bush, grandson of George W. Bush. A May runoff will be held between Troy Nehls and Kathaleen Wall.

TX-23 | Open Seat - Lean Democratic

Rep. William Hurd (R)

Rep. Hurd's seat was already vulnerable, but his retirement decision edges the seat from a toss-up into Lean Democratic territory. The district is 69% Hispanic and was won by Hillary Clinton. Democrats are rallying behind Gina Ortiz Jones, who ran for the seat in 2018 and easily won the Democratic primary with 66.8%. Nine Republicans joined the race with Tony Gonzales (28.1%) and Raul Reyes (23.3%) running off in May.

TX-24 | Open Seat - Toss Up

Rep. Kenny Marchant (R)

Marchant's district is shifting into a more diverse makeup and a possible Democratic pickup seat. Out of a field of five Democrats running, Kim Olson and Candace Valenzuela are in a runoff with Olson taking 40.9% of the vote and Valenzuela garnering 30.4% of the vote. Meanwhile, Republicans voted Beth Van Duyne to run in the general election.

California

CA-25 | Special Election & Open seat - Likely Democratic

Rep. Katie Hill (D)

Hill resigned due to a House Ethics Committee investigation. Democratic Assemblywoman Christy Smith has emerged as a heavy favorite. This was an unusual race where voters needed to vote twice – once as part of the special election and second in the primary for the full term. Six Democrats, five Republicans, and one independent ran with only three emerging as serious contenders. With 74.7% of the precincts reporting, Democrat Christy Smith (29.8%) and Rep. Mike Garcia (24.6%) are the top two in the primary. Christy Smith is in a runoff against Mike Garcia for the special election after not achieving 50% of the vote.

CA-50 | Solid Republican - Special Election

Rep. Duncan Hunter (R)

Hunter pleaded guilty to federal corruption charges at the end of 2019 and resigned from Congress in January. Hunter's departure has improved Republicans' hold of the traditionally GOP district. Still, Democratic former Labor Department official Ammar Campa-Najjar leads 34.4% to 24.9% as he heads into a runoff against former GOP Rep. Darrell Issa. Issa, the one-time chairman of the House Oversight Committee, previously represented the next-door district and is running in District 50 due to redistricting.

CA-16 | Solid Democratic

Jim Costa (D)

Costa, a senior member of the House Committee on Agriculture and the last Blue Dog Democrat in the Central Valley, keeps on surviving in this 60% Latino Fresno seat but faced a considerable threat from a Hispanic Democratic challenger from Fresno, Councilwoman Esmeralda Soria, as she campaigned against him on immigration and gun control issues. In the end, Soria was able to siphon enough of the Democratic votes only to reach 37.5%. Costa edged out Soria, and will face off against Republican Kevin Cookingham, who led Costa in the top-two primary by just two points.



Races of interest

Important Senate races

Alabama

AL Senate | Lean Republican - Incumbent

Sen. Doug Jones (D)

Sen. Jones' seat went from a toss-up seat to leaning Republican seat, making him the most endangered and targeted Senate Democrat in the 2020 races. Former Alabama Sen. Jeff Sessions jumped in the primaries to see if he could win back his seat after vacating the seat to become Attorney General in President Donald Trump's administration. Former Auburn head football coach Tommy Tuberville and Rep. Bradley Byrne also ran, with all three GOP candidates spending a predictable amount of time wooing Trump for an endorsement. The race will go to runoff at the end of the month as Tommy Tuberville took 33.4% of the vote, and Jeff Sessions fell in a slight second with 31.6%.

North Carolina

NC Senate | Lean Republican - Incumbent

Sen. Thom Tillis (R)

Sen. Tillis is one of the Republicans' most endangered incumbents. Tillis will face former state Sen. Cal Cunningham in the general election after Cunningham defeated state Sen. Erica Smith in a race that uniquely saw significant outside fundraising from both Democratic and Republican groups. Cunningham garnered 57% of the vote to Smith's 34.8%.

Texas

TX Senate | Solid Republican - Incumbent

Sen. Jon Cornyn (R)

A crowded field of a dozen Democrats entered the primary to run against Sen. Cornyn. The Democratic Senatorial Campaign Committee (DSCC) endorsed former Air Force Helicopter pilot and Purple Heart recipient Mary Hegar. Hegar became well known for her viral ads when she ran for the 31st District in 2018. Hegar won (22.3%) but is headed into a runoff with Royce West (14.5%) in May.

Thoughts beyond

Super Tuesday

“Cash is king in politics, until it isn't. Message, momentum, and endorsements have so far been the driving factors for voters, managing to step in front of the unlimited resources used so far in the campaign.

With a significantly whittled down race, there are now two major themes to watch for as we plunge towards the July convention. The first is to see when the others drop out, who they endorse, and who else will come off the sidelines. The second, now that we are effectively in a two candidate race, is how the race begins to bear down into the real differences between each of these contenders beyond the broad headline of “progressive” versus “moderate.” A Biden or Sanders presidency will have significant and very different implications for industries ranging from health care to energy, to national security and technology, and these differences will have implications not in a broad economic sense but in the everyday lives of American people.”

Ivan Zapien, Partner

“We learned on Super Tuesday that endorsements still matter. Late deciders appeared to have overwhelmingly voted for Biden, and Bloomberg's exit and endorsement of Biden should help to further that trend. Super Tuesday has historically been the road to the nomination, we will see if that trend continues.

With Biden and Sanders we now have two candidates with very different views on the future of the nation's health care system. One of Sanders' primary platform positions is Medicare For All, a position that Biden has come out strongly against while pushing his “public option” plan. Health care is regularly one of the top issues voters weigh when it comes to placing votes. So we expect this debate to continue throughout the campaign.”

Kate McAuliffe, Counsel

“While Biden certainly surged ahead and swung momentum back in his favor, Sanders has shown no signs of slowing down. President Donald Trump remains a strong contender waiting in the wings for either candidate, which puts a great weight on the Democratic National Committee to be prepared to handle the convention in July just right. If there is a contested convention, and Biden comes out on top, it will be absolutely vital for Democrats not to alienate Sanders supporters if they are to stand any chance against Trump.

There are now two stark choices when it comes to energy policy between Biden and Sanders. Sanders wants to ban all hydraulic fracturing, while Biden does not. Sanders wants to phase out nuclear power, while Biden has not been as strong on that front. Though this may not be the driving factor that determines the outcome of this election, the stakes are now clear for the energy industry should either of these candidates manage to take the White House.”

Aaron Cutler, Partner

“Super Tuesday not only clarified the Democratic frontrunners in the race, but it also clarified what Democratic voters want. They want to beat President Trump above all else.

One thing remains unclear: if a Democrat is elected, what would it mean for the sweeping changes made by the Trump Administration's trade policy? Would Sanders undo agreements like the USMCA and the China deal? Would Biden work to renegotiate Trump and even Obama-era deals? All businesses should watch this space closely over the next several months.”

Bob Kyle, Partner

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