

Leadership 2028

An Early, In-Depth Look at the Potential Field Taking Shape

The 2028 Field Takes Shape

With an invisible primary taking shape and voters sharpening their attention, Future Majority has launched its presidential listening research to build one of the most comprehensive public-opinion analysis of the emerging 2028 contest. Across surveys in eight states conducted between October 2025 and April 2026, we surveyed 8,641 voters to uncover how voters see the state of leadership and what they want in their national leaders.

Leadership 2028 research overview:

- **Democratic primary voter surveys in anticipated early states** in New Hampshire and Michigan (April 2026), South Carolina and Nevada (January-February 2026)
- **General-election voter surveys** in Arizona (April 2026) and Pennsylvania (October 2025 and January-February 2026)
- **Specialized sample of Black voters** across Georgia, Michigan, North Carolina, and South Carolina (October 2025)

Together, these surveys provide an in-depth look at the early primary battlegrounds, the general-election swing states that will decide the presidency, and the coalition Democrats will need to rebuild to win and effectively govern. We have tested many prospective Democrats' strengths, weaknesses, and biographical assets, as well as the presumed Republican nominee, JD Vance, and dug deep on what traits these voters say they want in their next president.

What We're Seeing

1. **Voters are tuned in.** Committed Democrats are looking beyond 2026. 94% in both New Hampshire (Registered Dems) and Michigan (Definitely Dems) rate their motivation to vote in the 2028 primary an 8 or higher on a 10-point scale, with strong engagement in softer primary voters (85% of MI's Probably Dem Primary voters and 67% of NH's Undeclared voters)
2. **The landscape is formidable.** Despite JD Vance underperforming Donald Trump, the early data show both Vance and Marco Rubio are likely serious general-election threats for Democrats. Still, Vance underperforms when Democrats can hold their baseline and persuade movables. Many contenders in the Democrats' potential field do not
3. **Primary and general-election viability move in opposite directions.** Senator Mark Kelly has a strong baseline on trait measures and likely strength in both the primary and general. Governors Andy Beshear and Wes Moore show real upside as voters learn more. Former Secretary Pete Buttigieg and Governor Josh Shapiro face headwinds. For former Vice President Kamala Harris, 2024 baggage may be insurmountable. Similarly, negative perceptions about progressives may be too much for Governor Gavin Newsom and U.S. Representative Alexandria Ocasio-Cortez in a general election. Still, Harris, Newsom, and AOC are received well by key voting blocs and maintain established brands. Governor JB Pritzker is a wild card: ability to self-fund with a strong, progressive record
4. **The Black electorate remains the foundation of any Democratic path back to the White House.** Our October 2025 survey of Black voters across Georgia, Michigan, North Carolina, and South Carolina shows a coalition that is rebuildable but not automatic. Their support is contingent on economic credibility and a clear governing record, and the candidates who speak to those priorities will hold this coalition together. Former Vice President Harris enters with a head start (84% favorable, 72% considering) but her position may be a ceiling to protect, not a floor to build on
5. **Early money matters.** The Democrats building real financial infrastructure now will have a meaningful advantage in a field with a deep bench and a lot of persuadable voters. Democrats who choose to run will need to hit the ground at a sprint without missteps to show voters how they will fight for them

Voters are Tuned In

Democrats have high enthusiasm and an eye to the future

Motivation to Vote in Primary

Among All
Michigan
Democratic
Primary Voters



How motivated are you to vote in the 2028 Democratic primary election for President on a scale from 0 to 10, where a 0 means you are not motivated at all and a 10 means you are extremely motivated to vote?

Motivation Score	Total	Definitely Dem Primary	Probably Dem Primary	Maybe Dem Primary	Women	Men	18-34	35-49	50-64	65+
Highly Motivated (8-10)	83	94	85	24	88	75	76	79	75	91
Moderately Motivated (4-7)	11	5	7	50	9	15	17	14	15	5
Not Motivated (0-3)	6	1	8	26	3	10	7	7	9	3

Motivation to Vote in Primary

Among All New Hampshire
Democratic Primary Voters

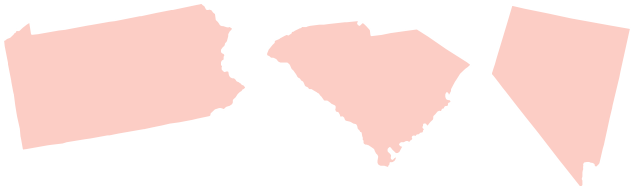


How motivated are you to vote in the 2028 Democratic primary election for President on a scale from 0 to 10, where a 0 means you are not motivated at all and a 10 means you are extremely motivated to vote?

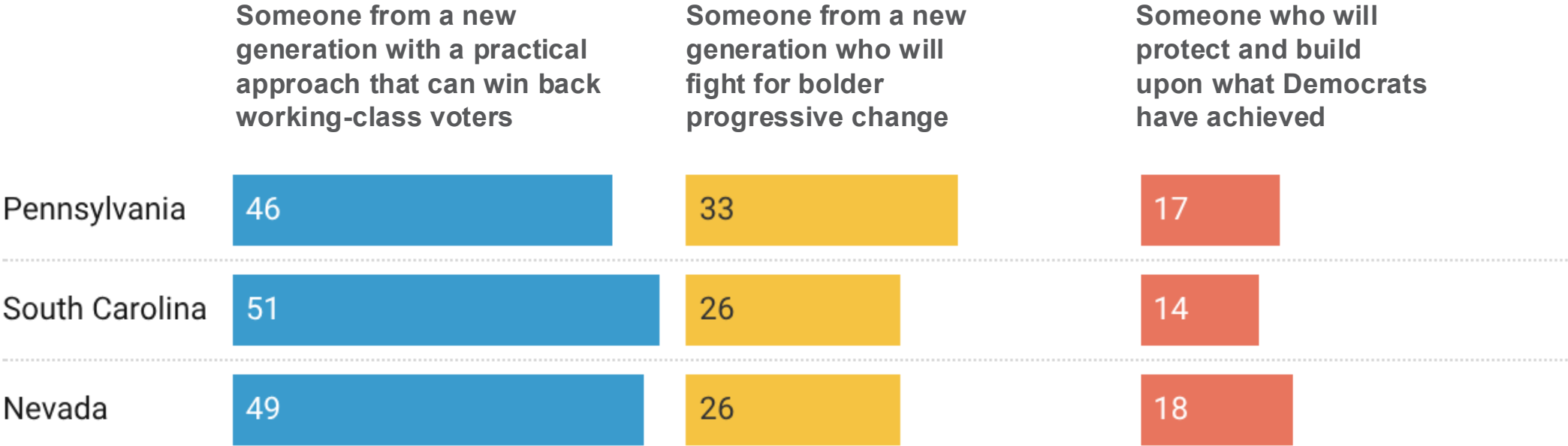
Motivation Score	Total	Registered Democrats	Registered Undeclared	Women	Men	18-34	35-49	50-64	65+
Highly Motivated (8-10)	83	94	67	87	76	76	74	87	90
Moderately Motivated (4-7)	11	4	21	8	16	16	16	8	7
Not Motivated (0-3)	6	2	12	5	8	8	10	5	3

Democrats want new leaders

Looking ahead to the next presidential election, which of the following would you prefer as the Democratic nominee?



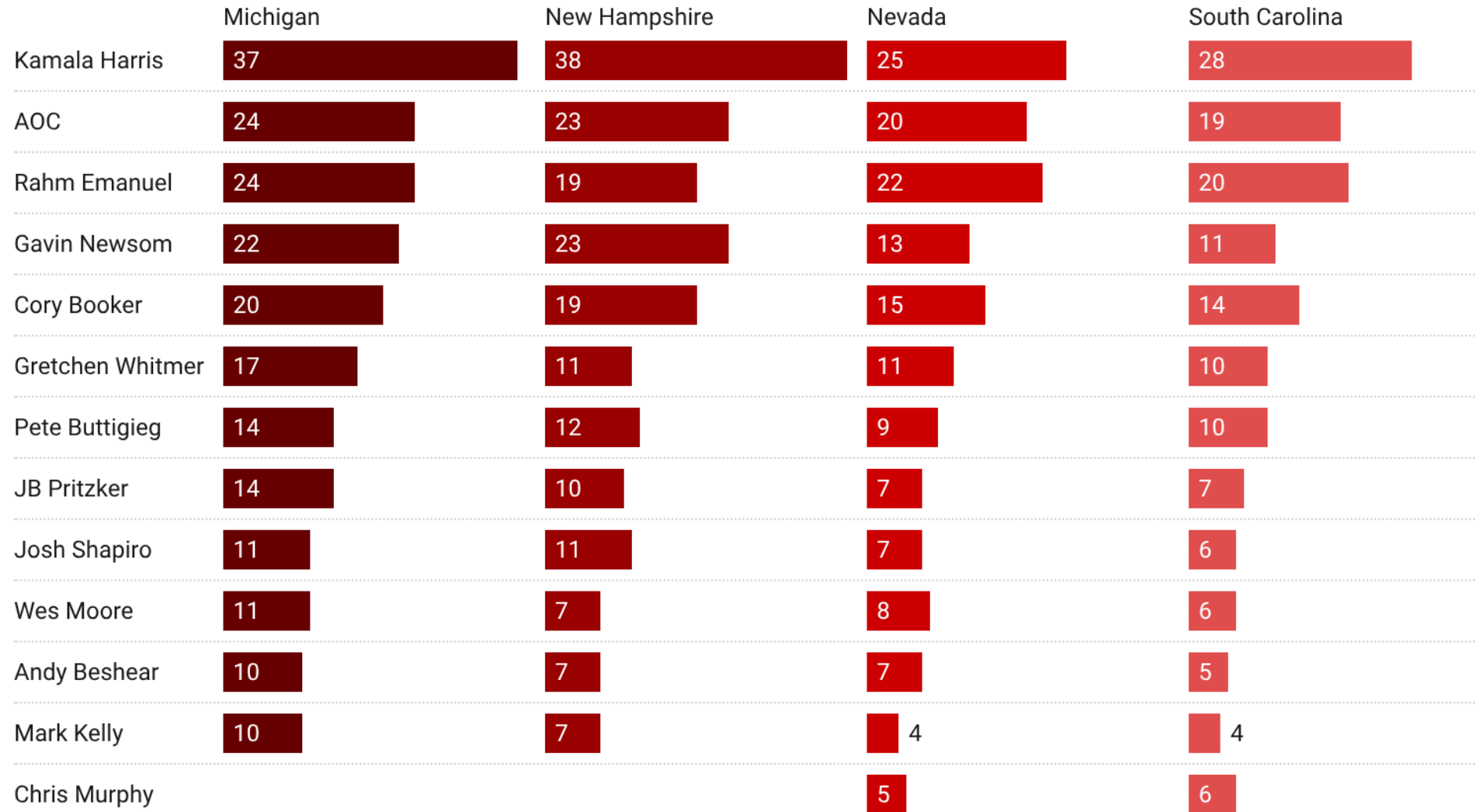
Among Democratic Primary Voters



Disappointed if Chosen

Among All Democratic Primary Voters

Which, if any, of the following would disappoint you if they were the Democratic nominee? Choose all that apply.

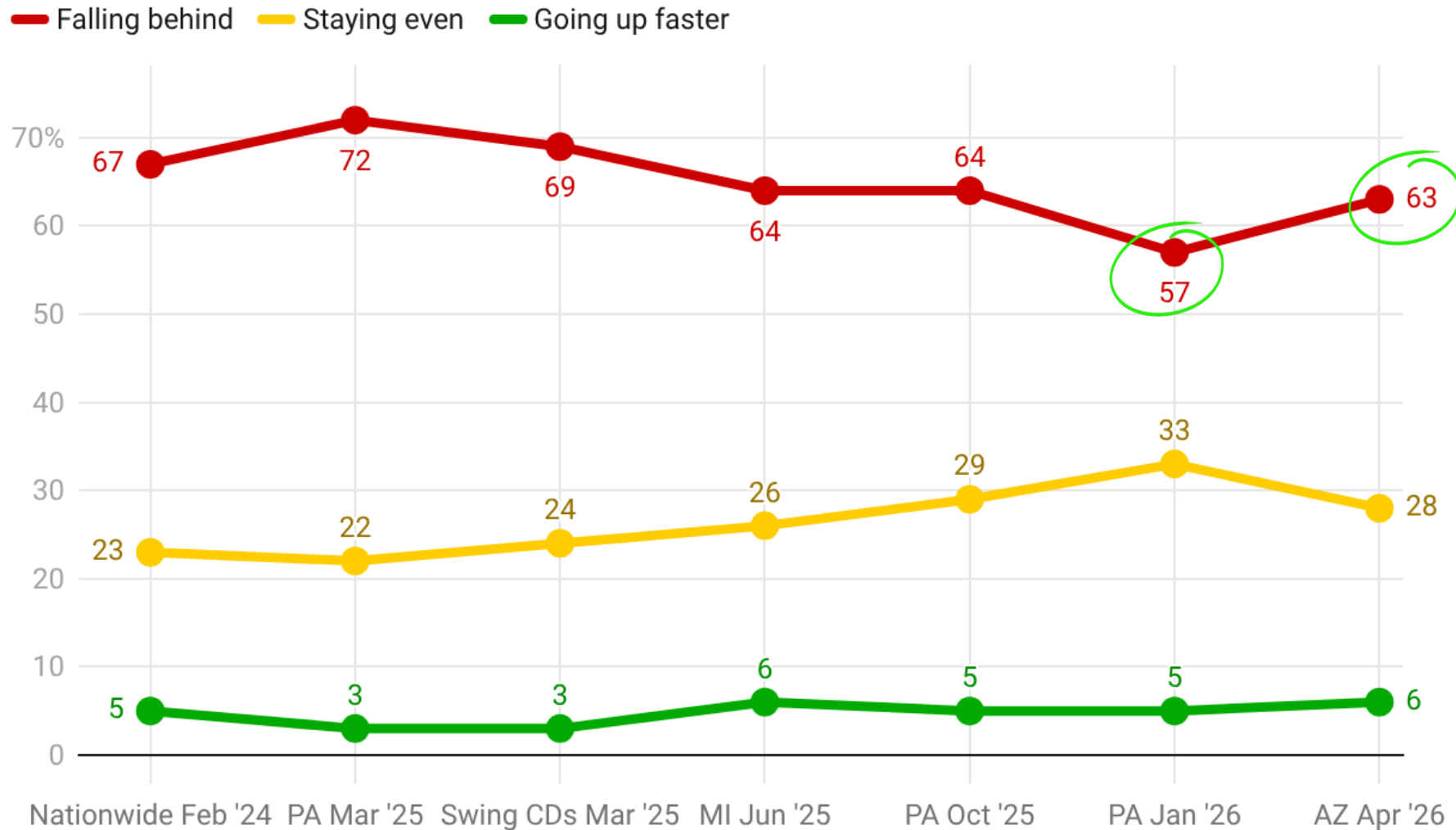


The Landscape is Formidable

Democrats cannot begin preparing too early for 2028

Cost-of-Living Opinions Since '24

Would you say your income is:

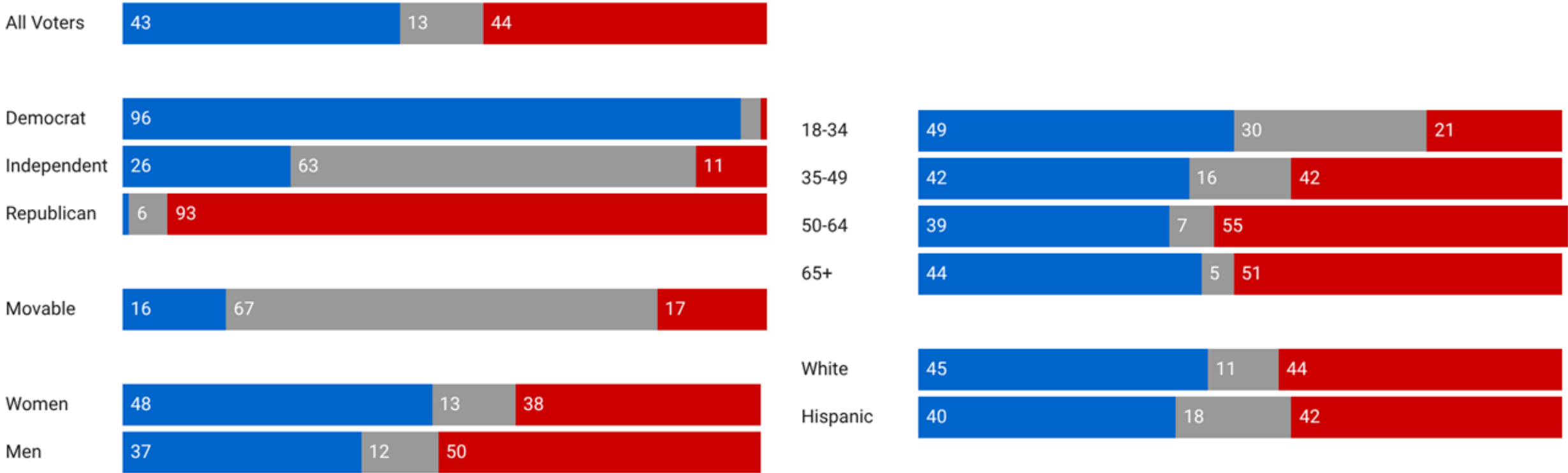


2028 Generic Preference

Among All
Arizona
Voters



It is a long way off, but please look ahead to the next presidential election in 2028. If the general election were held today, please indicate which you are most likely to support.

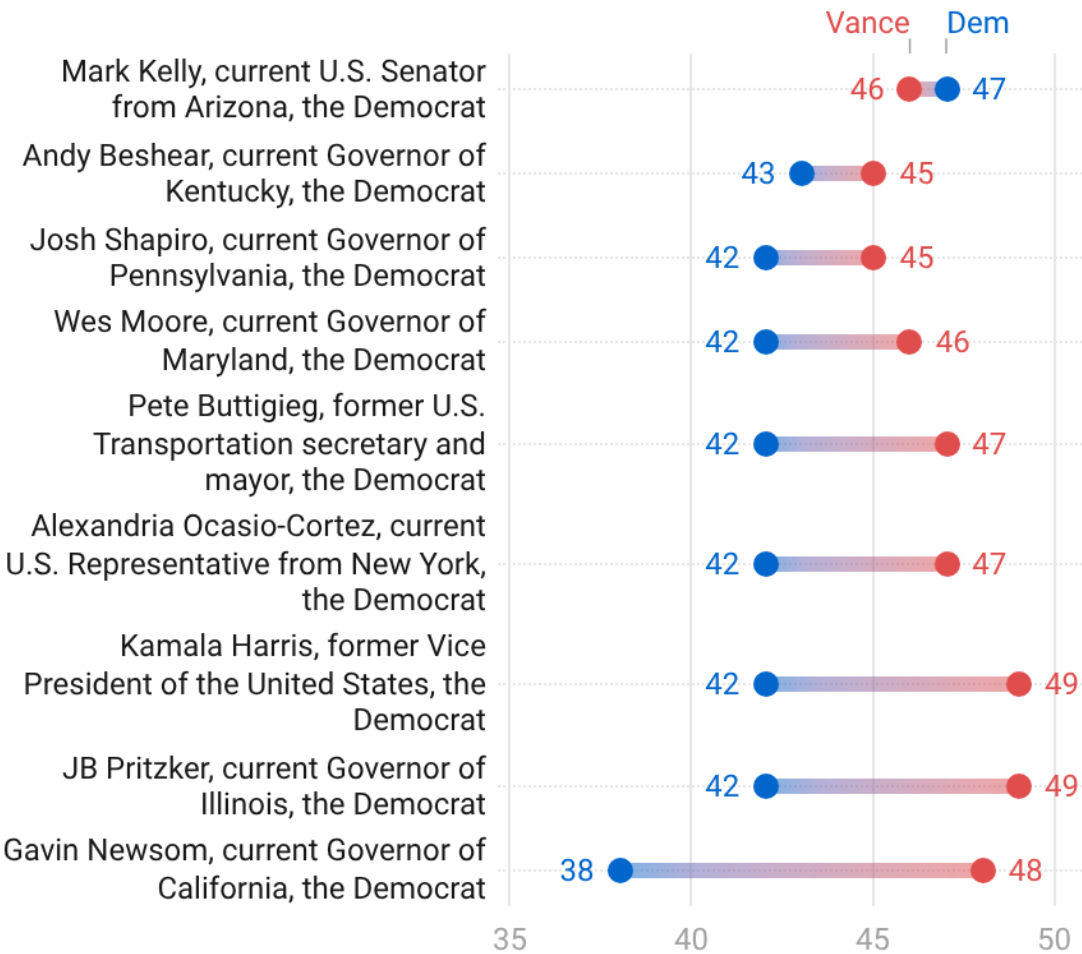


2028 Hypothetical Scenarios

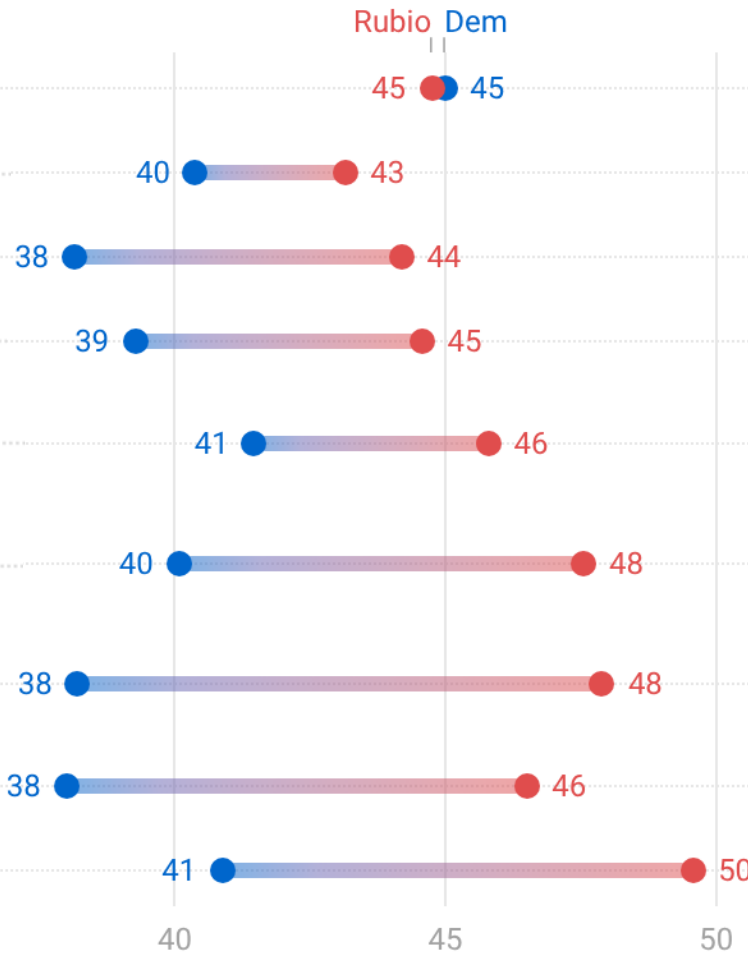
Among All
Arizona
Voters



Dem vs. JD Vance



Dem vs. Marco Rubio



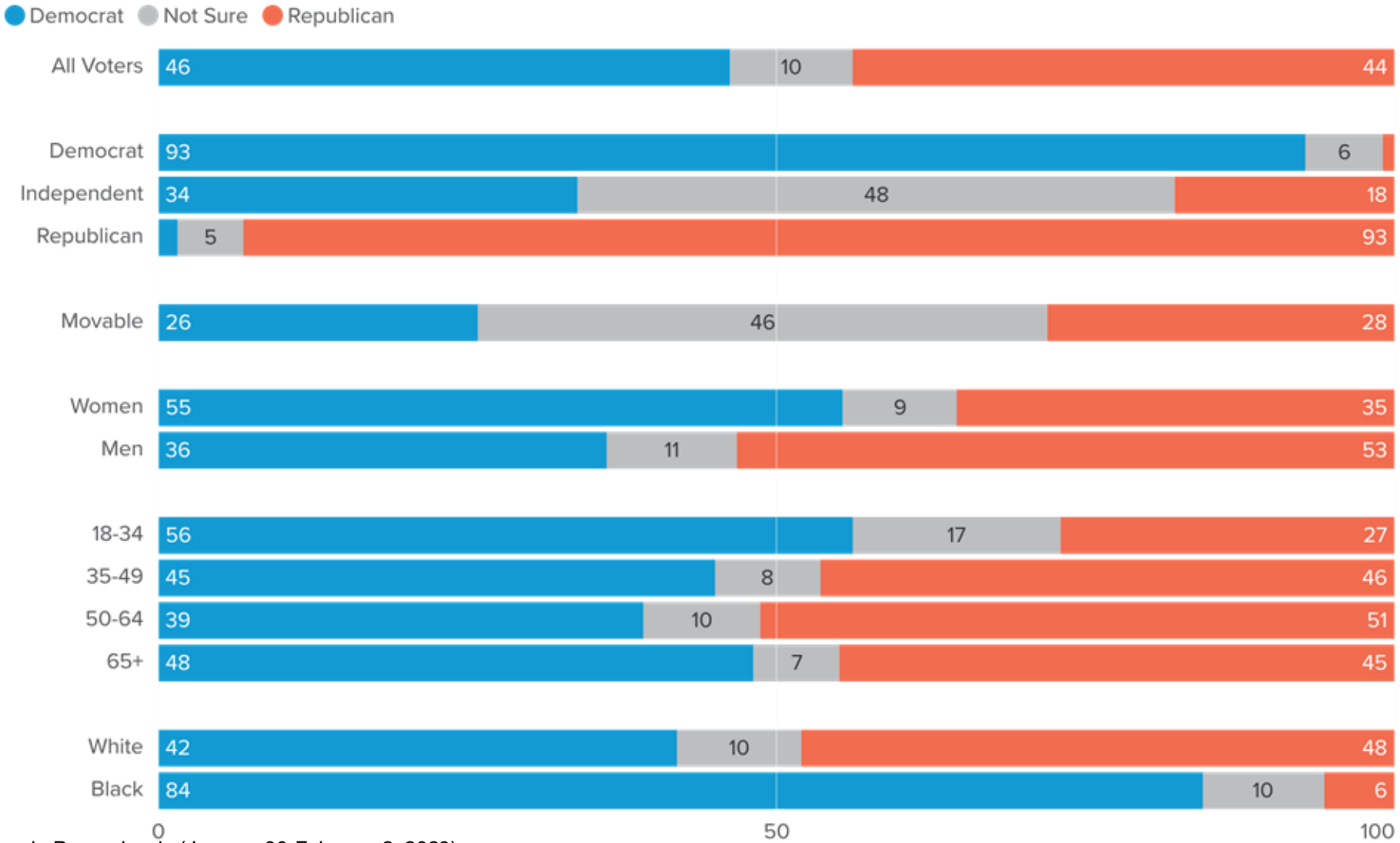
Survey of 1,048 statewide voters in Arizona (April 15-21, 2026). Vote came after messaging on several figures. Respondents were not exposed to messaging about Cory Booker, Rahm Emanuel, or Gretchen Whitmer. Some totals may not equal 100 due to rounding

2028 Generic Preference

Among All Pennsylvania Voters

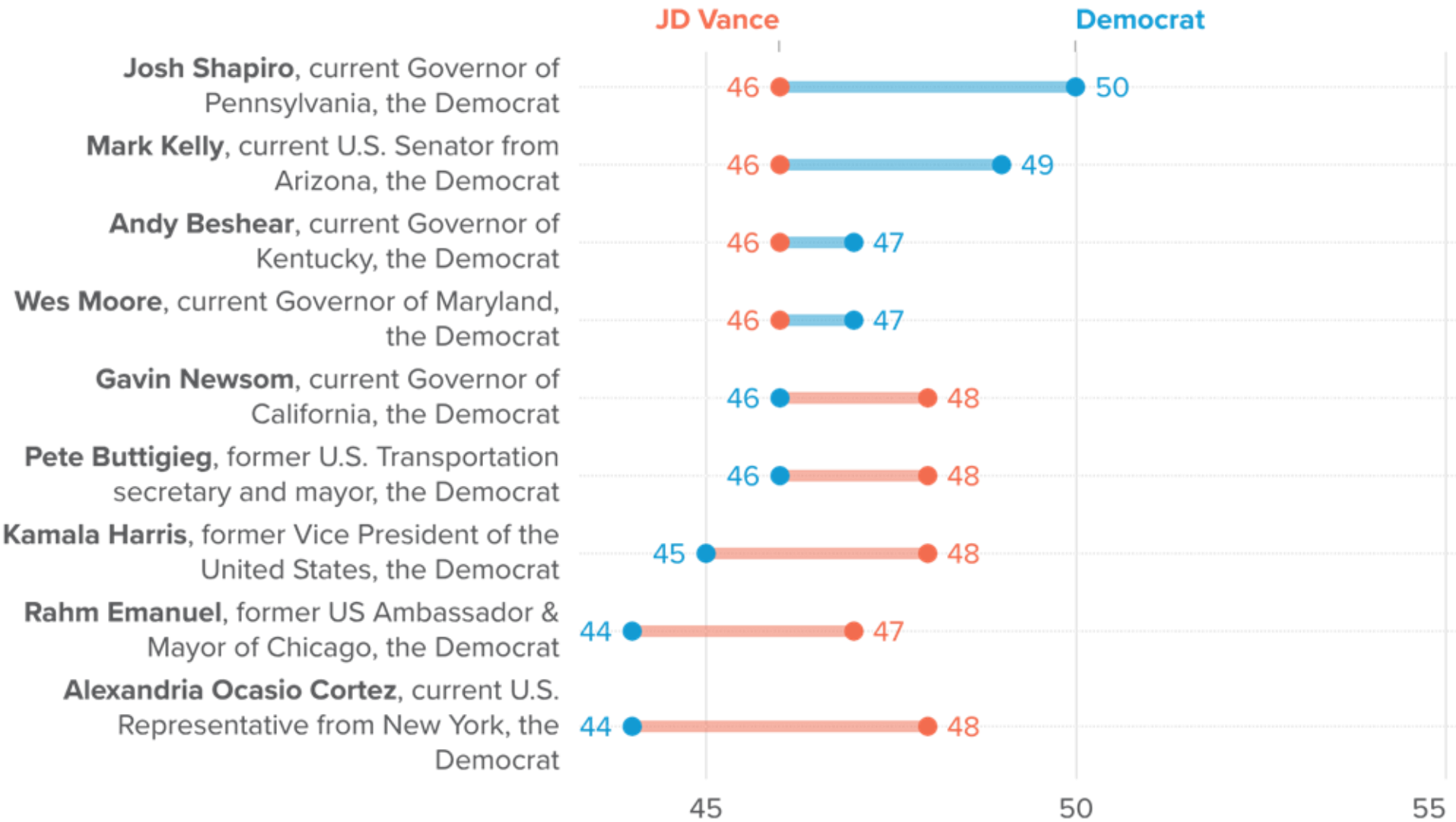


It is a long way off, but please look ahead to the next presidential election in 2028. If the general election were held today, please indicate which you are most likely to support.



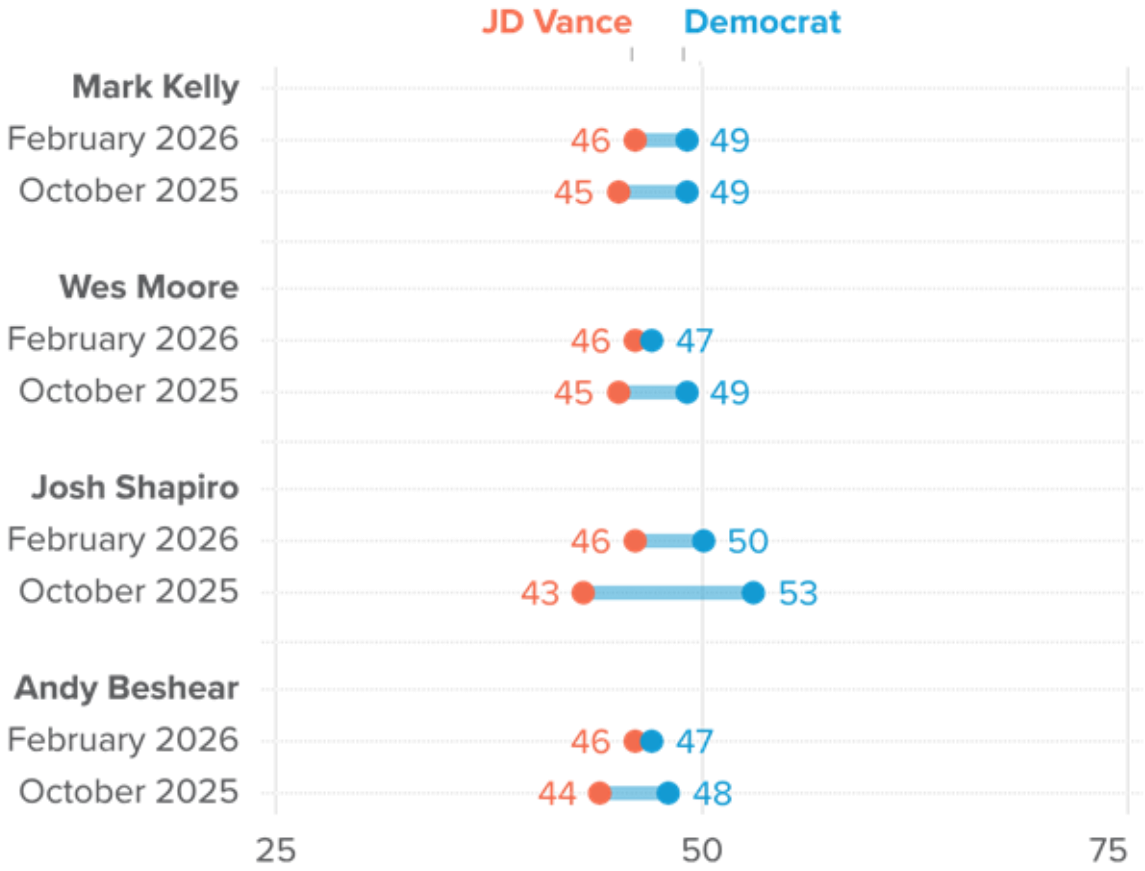
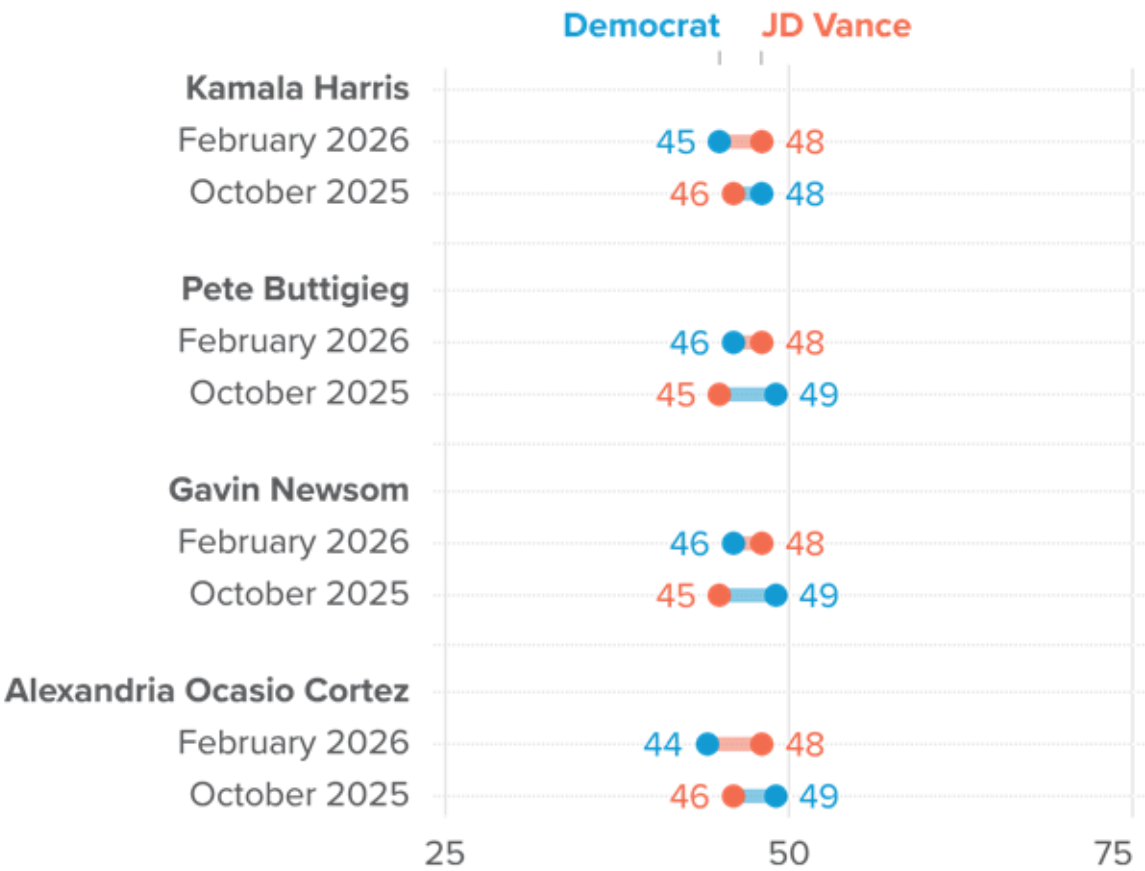
2028 Hypothetical Scenarios

Among All Pennsylvania Voters



Trend in 2028 Preference

Among All Pennsylvania Voters



Primary vs. General Viability Diverge

First Choice - New Hampshire

Among All New Hampshire
Democratic Primary Voters



Figure	All	Women	Men	18-34	35-49	50-64	65+	Dem	Undec
Pete Buttigieg	24	28	19	21	20	28	27	29	19
Mark Kelly	13	11	17	5	10	13	21	13	13
AOC	13	12	13	27	19	6	3	14	10
Gavin Newsom	10	10	10	9	9	12	11	12	7
Kamala Harris	8	9	6	8	8	10	6	9	7
Cory Booker	3	3	3	4	1	2	4	3	3
Josh Shapiro	3	3	3	2	3	4	3	2	5
JB Pritzker	2	2	3	1	2	2	3	3	1
Andy Beshear	1	1	1	1	1	0	3	1	2
Gretchen Whitmer	1	2	1	0	3	1	1	1	2
Rahm Emanuel	1	1	1	1	2	1	0	1	1
Wes Moore	0	0	1	1	0	0	1	0	0
Not sure	19	18	22	20	22	19	17	11	30

First or Second Choice - New Hampshire

Among All New Hampshire
Democratic Primary Voters



Figure	All	Women	Men	18-34	35-49	50-64	65+	Dem	Undec
Pete Buttigieg	41	44	38	36	30	48	47	46	35
Mark Kelly	29	28	30	10	26	31	43	31	25
AOC	24	24	24	47	31	17	8	26	21
Gavin Newsom	22	21	23	20	22	24	23	26	16
Kamala Harris	20	23	16	26	23	18	14	20	20
Cory Booker	9	9	8	9	6	7	11	10	7
Josh Shapiro	7	6	7	4	6	9	7	5	9
JB Pritzker	7	7	8	4	9	9	8	9	5
Andy Beshear	5	4	6	3	4	5	6	4	6
Gretchen Whitmer	5	5	6	3	6	6	5	5	6
Rahm Emanuel	2	2	2	1	2	2	2	2	2
Wes Moore	2	2	3	2	4	0	3	1	3

Survey of 1,123 Democratic primary voters in New Hampshire (April 16-21, 2026). All respondents saw a description of each figure's current or former position. Respondents were not exposed to messaging about Cory Booker, Rahm Emanuel, or Gretchen Whitmer. New Hampshire's primary election rules allow undeclared/independent registered voters to participate in a party primary

First Choice - Michigan

Among All Michigan
Democratic Primary Voters



Figure	All	Women	Men	18-34	35-49	50-64	65+	White	Black
Pete Buttigieg	18	20	16	12	19	20	19	21	4
Gretchen Whitmer	17	18	16	30	23	15	10	14	32
Mark Kelly	14	13	16	2	9	15	22	17	2
Gavin Newsom	10	9	11	5	5	11	14	10	12
AOC	9	8	8	26	11	3	3	8	6
Kamala Harris	7	9	5	12	6	6	6	6	19
Josh Shapiro	3	2	5	1	1	5	4	3	1
JB Pritzker	3	4	1	1	2	2	5	3	4
Andy Beshear	2	1	4	1	3	3	2	2	0
Cory Booker	2	2	1	0	1	4	2	1	4
Wes Moore	1	1	1	1	0	0	2	0	3
Rahm Emanuel	1	1	0	0	1	1	0	0	2
Not sure	14	13	16	9	20	15	12	13	12

First or Second Choice - Michigan

Among All
Michigan
Democratic
Primary Voters



Figure	All	Women	Men	18-34	35-49	50-64	65+	White	Black
Pete Buttigieg	33	35	29	26	31	36	34	37	11
Gretchen Whitmer	33	34	32	54	33	33	25	30	56
Mark Kelly	25	22	29	7	18	27	37	29	6
Gavin Newsom	23	22	24	13	19	25	27	22	30
AOC	18	16	18	44	25	8	7	17	11
Kamala Harris	16	21	10	20	20	15	14	14	37
JB Pritzker	9	9	8	5	6	5	13	10	4
Cory Booker	8	10	4	5	6	10	8	6	19
Josh Shapiro	6	4	9	2	4	10	8	7	1
Andy Beshear	5	3	8	2	7	6	5	6	0
Wes Moore	2	2	3	2	0	2	3	1	8
Rahm Emanuel	1	1	1	1	1	2	1	1	2

First Choice - South Carolina

Among All
South Carolina
Democratic
Primary Voters



	All	Women	Men	18- 34	35- 49	50- 64	65+	White	Black	
Gavin Newsom	21	21	22	12	10	25	25	20	24	Gavin Newsom
Kamala Harris	15	19	9	31	19	17	9	7	28	Kamala Harris
Mark Kelly	13	12	15	6	4	12	18	19	3	Mark Kelly
Pete Buttigieg	12	13	12	7	13	12	12	18	3	Pete Buttigieg
AOC	5	5	5	20	12	3	1	5	4	AOC
Wes Moore	5	6	4	1	9	4	4	2	11	Wes Moore
Cory Booker	4	3	5	0	5	4	4	2	7	Cory Booker
Josh Shapiro	4	2	6	1	2	2	6	5	2	Josh Shapiro
Andy Beshear	3	2	4	4	1	4	2	3	2	Andy Beshear
JB Pritzker	2	2	2	0	2	2	3	3	1	JB Pritzker
Gretchen Whitmer	1	1	0	0	3	0	0	1	1	Gretchen Whitmer
Chris Murphy	0	0	0	0	0	0	1	1	0	Chris Murphy
Rahm Emanuel	0	0	1	0	0	0	0	1	0	Rahm Emanuel
Not sure	15	14	16	17	20	14	13	14	15	Not sure

First or Second Choice - South Carolina

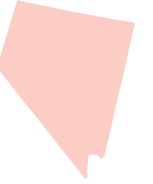
Among All
South Carolina
Democratic
Primary Voters



	All	Women	Men	18-34	35-49	50-64	65+	White	Black	
Gavin Newsom	37	37	37	25	27	44	40	36	40	Gavin Newsom
Kamala Harris	27	32	18	41	37	27	20	15	46	Kamala Harris
Pete Buttigieg	25	24	26	19	24	24	26	35	9	Pete Buttigieg
Mark Kelly	24	23	27	10	8	25	33	33	12	Mark Kelly
Cory Booker	13	14	10	4	21	13	11	5	24	Cory Booker
Josh Shapiro	11	9	13	4	4	10	16	15	6	Josh Shapiro
AOC	11	11	10	43	17	7	4	10	9	AOC
Wes Moore	7	7	8	4	11	6	8	3	15	Wes Moore
JB Pritzker	6	5	8	2	6	4	8	8	2	JB Pritzker
Andy Beshear	6	3	9	5	4	7	6	8	2	Andy Beshear
Gretchen Whitmer	5	6	5	3	6	7	5	6	5	Gretchen Whitmer
Chris Murphy	2	2	3	4	1	2	3	3	1	Chris Murphy
Rahm Emanuel	1	1	2	3	2	0	1	2	0	Rahm Emanuel

First Choice - Nevada

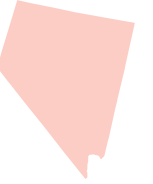
Among All
Nevada
Democratic
Primary Voters



	All	Women	Men	18-34	35-49	50-64	65+	White	Hisp	
Gavin Newsom	27	27	26	18	21	28	30	26	30	Gavin Newsom
Pete Buttigieg	18	16	19	6	22	20	17	19	17	Pete Buttigieg
Mark Kelly	15	16	15	5	3	15	22	18	9	Mark Kelly
Kamala Harris	10	13	7	16	13	13	7	7	14	Kamala Harris
AOC	8	7	10	33	14	8	2	8	11	AOC
Josh Shapiro	4	3	4	0	3	4	4	4	0	Josh Shapiro
Cory Booker	3	3	3	7	2	2	3	3	1	Cory Booker
JB Pritzker	2	2	1	1	1	0	3	3	0	JB Pritzker
Andy Beshear	1	2	1	0	5	1	1	1	4	Andy Beshear
Wes Moore	1	2	1	0	3	1	1	1	2	Wes Moore
Rahm Emanuel	1	0	1	0	0	1	1	1	0	Rahm Emanuel
Gretchen Whitmer	0	0	1	1	0	1	0	0	0	Gretchen Whitmer
Chris Murphy	0	0	0	0	0	1	0	1	0	Chris Murphy
Not sure	9	9	10	13	12	6	9	9	14	Not sure

First or Second Choice - Nevada

Among All
Nevada
Democratic
Primary Voters



	All	Women	Men	18-34	35-49	50-64	65+	White	Hisp	
Gavin Newsom	47	50	43	43	42	47	51	45	58	Gavin Newsom
Pete Buttigieg	31	30	32	13	36	30	34	34	33	Pete Buttigieg
Mark Kelly	30	31	29	11	18	31	37	34	18	Mark Kelly
Kamala Harris	23	26	20	43	27	27	16	17	39	Kamala Harris
AOC	16	14	19	43	27	17	7	17	14	AOC
Josh Shapiro	10	10	9	4	4	10	13	10	8	Josh Shapiro
Cory Booker	7	7	7	8	5	5	8	7	6	Cory Booker
JB Pritzker	5	4	6	1	3	2	8	7	0	JB Pritzker
Andy Beshear	4	3	4	1	6	3	4	4	4	Andy Beshear
Gretchen Whitmer	3	2	5	2	7	3	1	3	0	Gretchen Whitmer
Wes Moore	3	3	3	0	3	2	4	2	2	Wes Moore
Chris Murphy	3	3	2	0	4	2	3	4	0	Chris Murphy
Rahm Emanuel	2	2	3	0	2	1	3	2	2	Rahm Emanuel

Potential Contender Profiles

Voter Attitudes on Favorability, Traits, and Vote Choice



TOPLINES

U.S. Senator Mark Kelly

Summary:

Arizona U.S. Senator Mark Kelly registers the strongest general-election profile in the field - the only Democrat tested who bests Vance in Arizona (47-46) and holds a 3-point lead in Pennsylvania. His "could win" numbers among Democrats lead the field in many states surveyed (AZ 86%, MI 66%, NH 63%, SC 67%) and rank in the top three in the others. Primary voters view him as universally acceptable but is not usually a first-choice. Disappointment stays between just 4% and 10% across all four primary states, while his first-choice support sits in the 13-15% range.

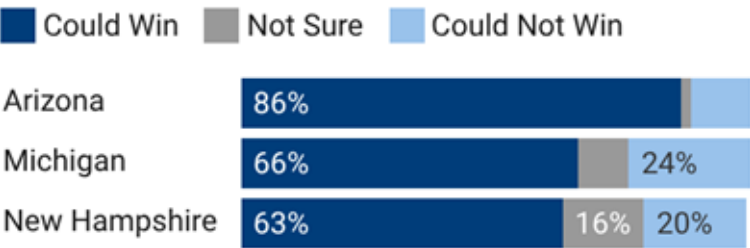
Mark Kelly | AZ/MI/NH Toplines

APRIL 2026

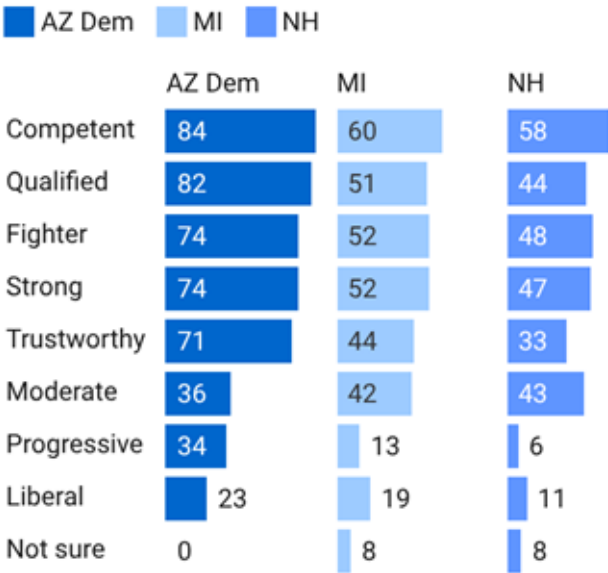
General Election Choice (AZ All Voters)



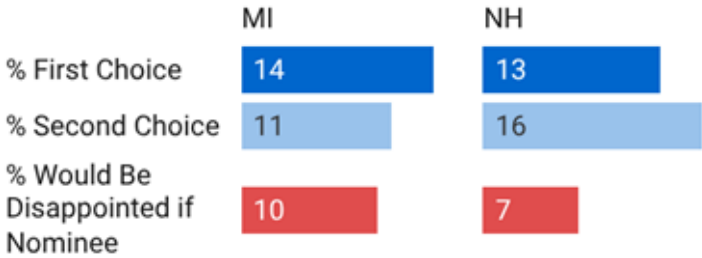
Ability to Win (Dems Only)



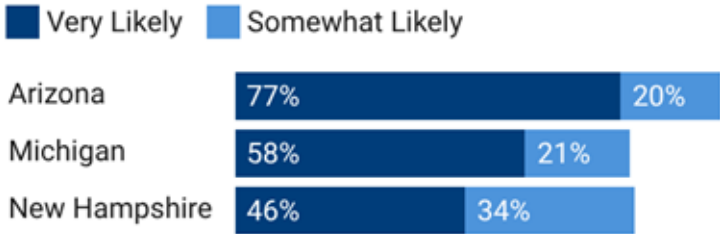
Traits Post Messaging (% Dems Selecting)



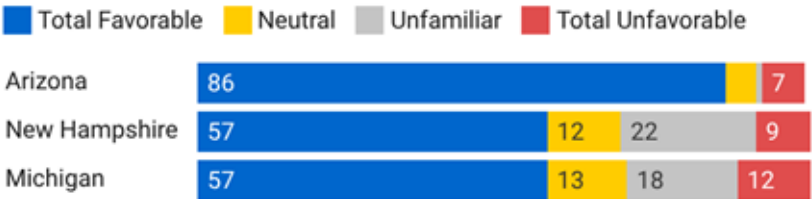
Primary Vote Choice



Willing to Consider Support Post Bio (Dems Only)



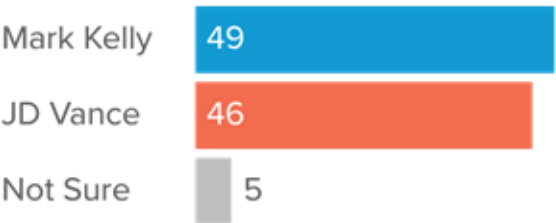
Personal Popularity (Dems Only)



Mark Kelly | PA/SC/NV Toplines

JANUARY-FEBRUARY 2026

General Election Choice (All PA Voters)

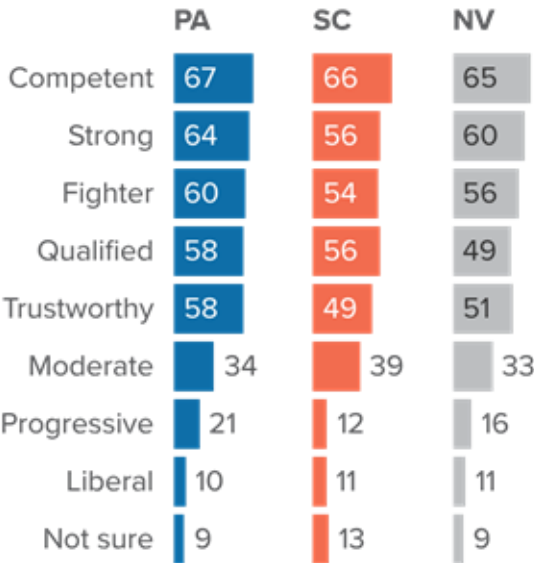


Ability to Win (Democrats)

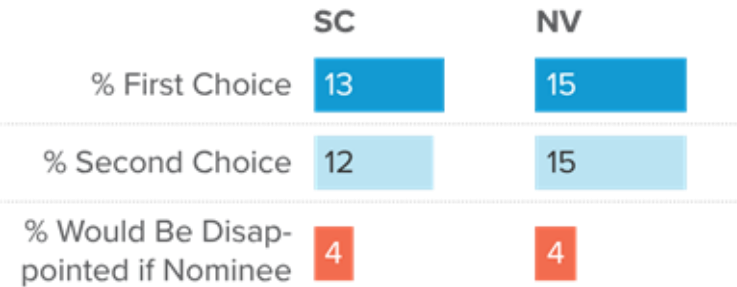
● Could Win ● Not Sure ● Could Not Win



Traits Post-Messaging (% Democrats Selecting)



Primary Vote Choice



Willing to Consider Support Post Bio (Democrats)

● Very Likely ● Somewhat Likely



Personal Popularity (Dems Only)

● Favorable ● Neutral ● Never Heard ● Unfavorable





TOPLINES

Governor Andy Beshear

Summary:

Kentucky Governor Andy Beshear is one of the field's "upside" contenders. Beshear currently draws just 1-3% primary first-choice support across all four early states (largely because 26-39% of Democrats report they have never heard of him). Once exposed to his biography, 65-79% of Democrats say they would consider supporting him, with "competent" and "moderate" emerging as his strongest brand attributes. His general-election performance is competitive. Beshear bests Vance in Pennsylvania 47-46.

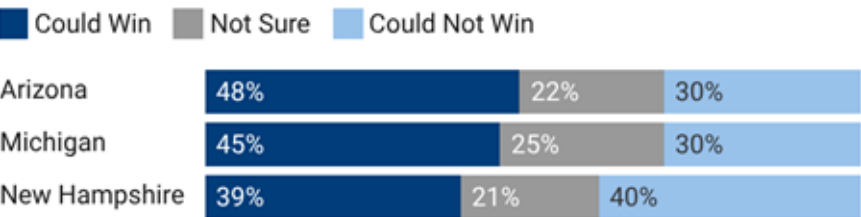
Andy Beshear | AZ/MI/NH Toplines

APRIL 2026

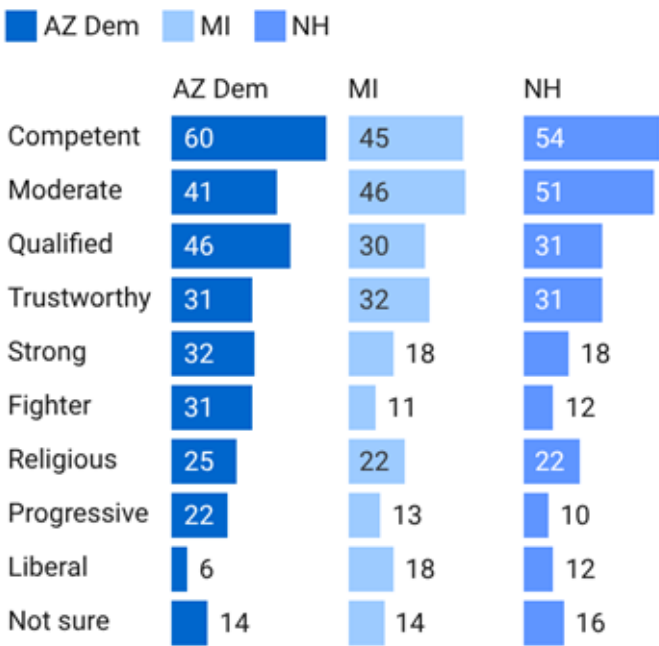
General Election Choice (All AZ Voters)



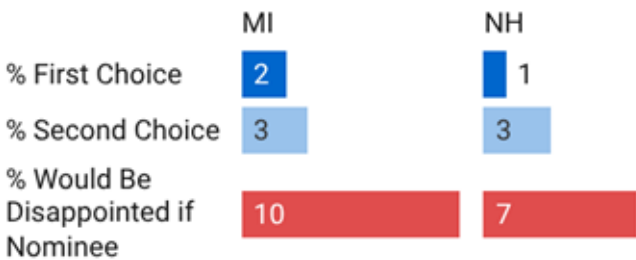
Ability to Win (Dems Only)



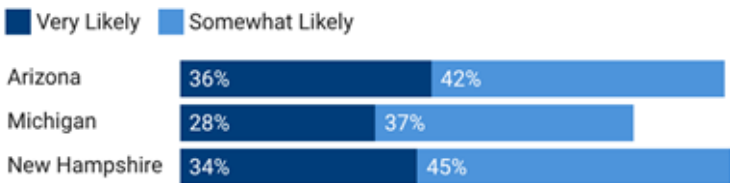
Traits Post Messaging (% Dems Selecting)



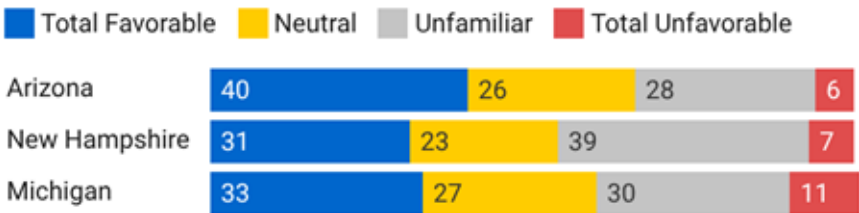
Primary Vote Choice



Willing to Consider Support Post Bio (Dems Only)



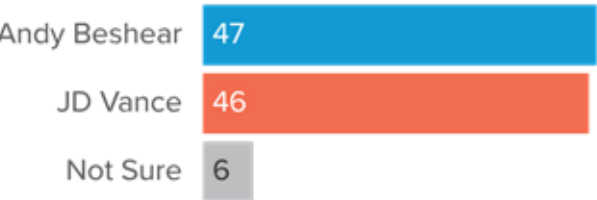
Personal Popularity (Dems Only)



Andy Beshear | PA/SC/NV Toplines

JANUARY-FEBRUARY 2026

General Election Choice (All PA Voters)

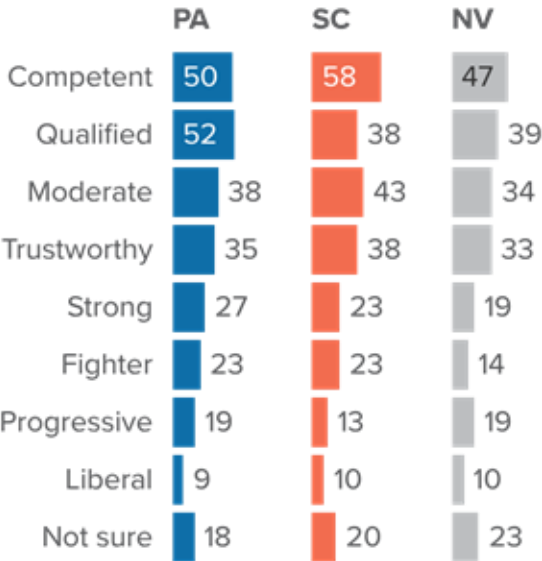


Ability to Win (Democrats)

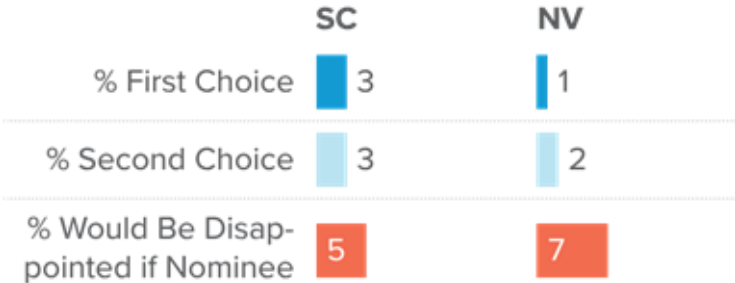
● Could Win ● Not Sure ● Could Not Win



Traits Post-Messaging (% Democrats Selecting)

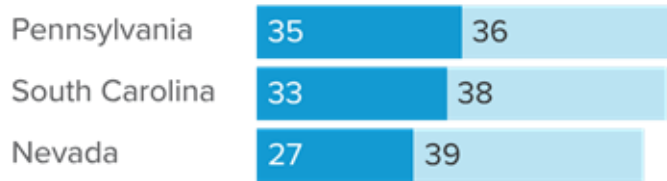


Primary Vote Choice



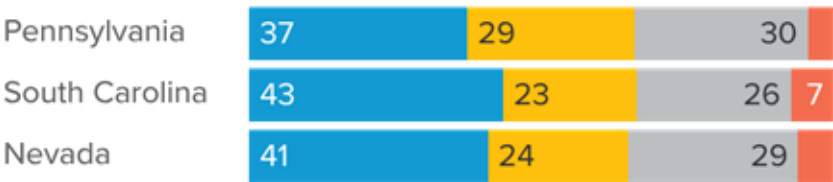
Willing to Consider Support Post Bio (Democrats)

● Very Likely ● Somewhat Likely



Personal Popularity (Dems Only)

● Favorable ● Neutral ● Never Heard ● Unfavorable





TOPLINES

Governor Wes Moore

Summary:

Maryland Governor Wes Moore is another of the field's "upside" candidates. Moore draws 0-5% primary first-choice support across the four early states while 28-45% of Democrats have never heard of him. But once exposed to his biography, 66-84% of Democrats say they would consider supporting him, with "competent" and "qualified" as his standout brand attributes. His general-election performance is mixed: he wins Pennsylvania 47-46 over Vance but loses Arizona by four (42-46) and falls further against Rubio (39-45). Moore's untapped asset is his standing with Black voters - 38% considering and 7% first-choice in our October survey

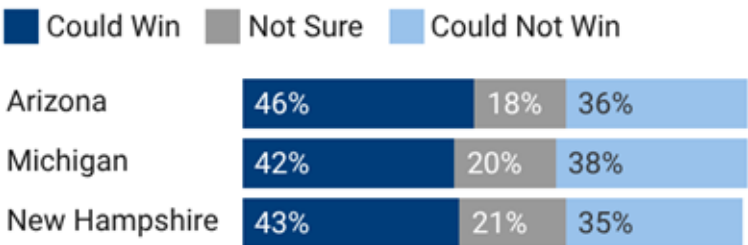
Wes Moore | AZ/MI/NH Toplines

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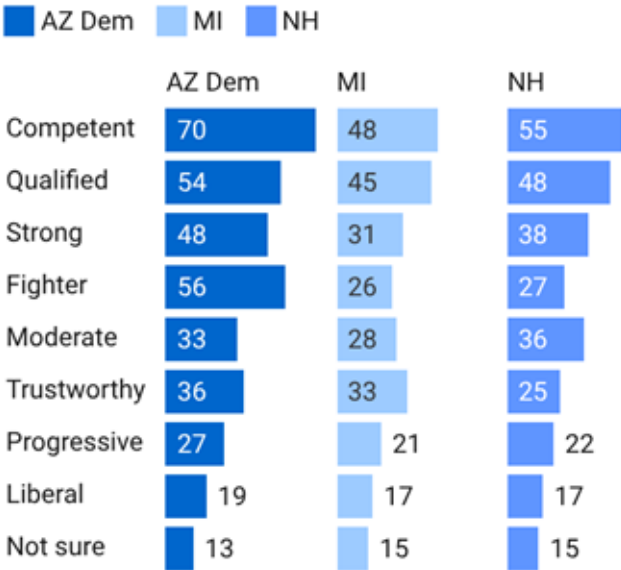
General Election Choice (All AZ Voters)



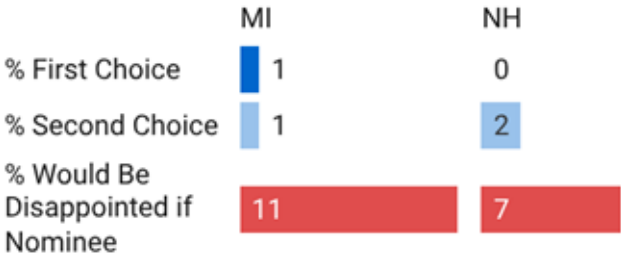
Ability to Win (Dems Only)



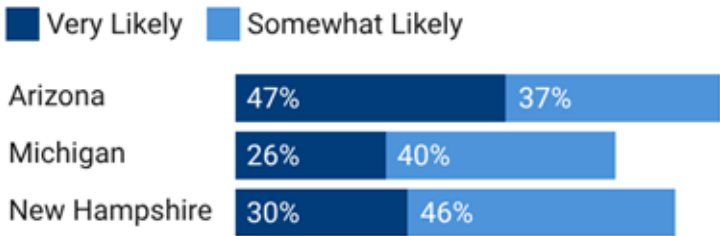
Traits Post Messaging (% Dems Selecting)



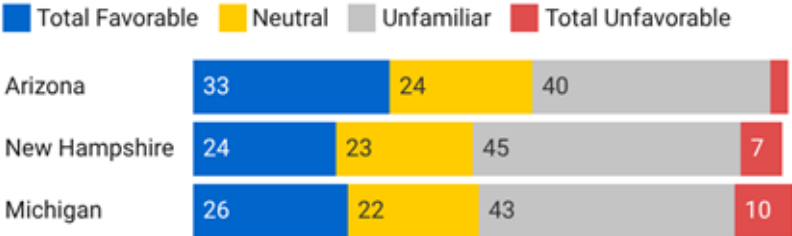
Primary Vote Choice



Willing to Consider Support Post Bio (Dems Only)



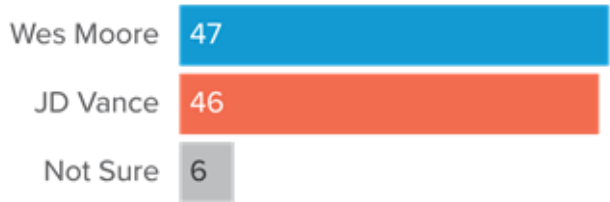
Personal Popularity (Dems Only)



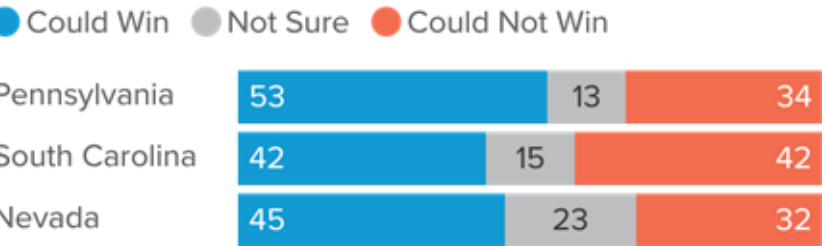
Wes Moore | PA/SC/NV Toplines

JANUARY-FEBRUARY 2026

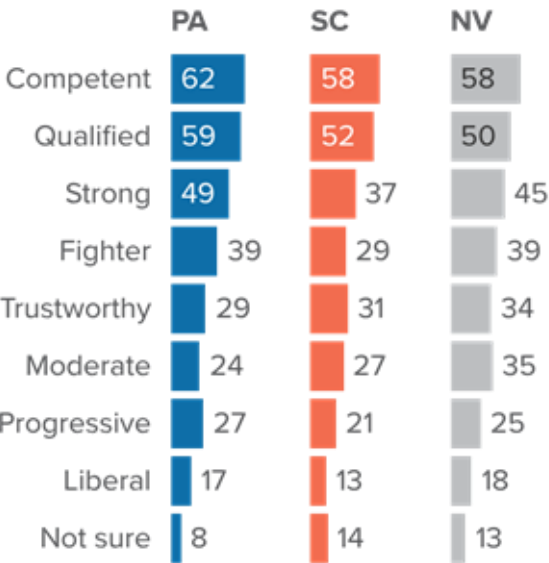
General Election Choice (All PA Voters)



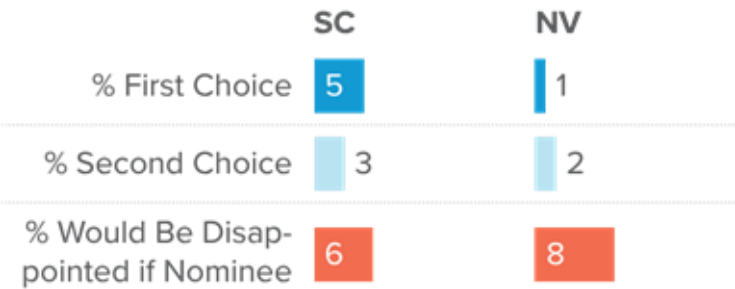
Ability to Win (Democrats)



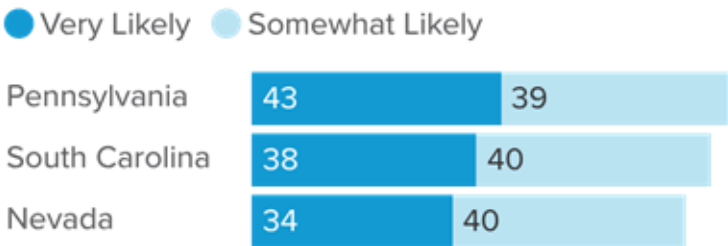
Traits Post-Messaging (% Democrats Selecting)



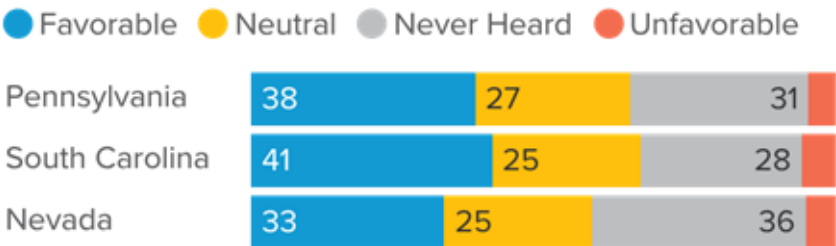
Primary Vote Choice



Willing to Consider Support Post Bio (Democrats)



Personal Popularity (Dems Only)





TOPLINES

Governor Josh Shapiro

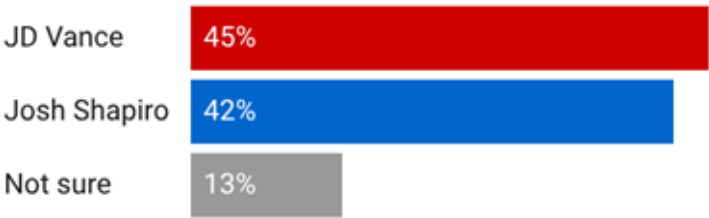
Summary:

Pennsylvania Governor Josh Shapiro presents the field's sharpest home-state-versus-elsewhere split. In Pennsylvania, he is the strongest candidate tested, besting Vance 50-46 with 87% personal favorability among Democrats and 80% saying he "could win." Outside Pennsylvania, however, his profile thins considerably: 3-4% first-choice support in every primary state, disappointment numbers of 6-11%, and "trustworthy" and "fighter" trait scores that fall to the teens in NH and MI. His path is further constrained by concerns that intersect directly with primary-base priorities on labor, environment, and accountability

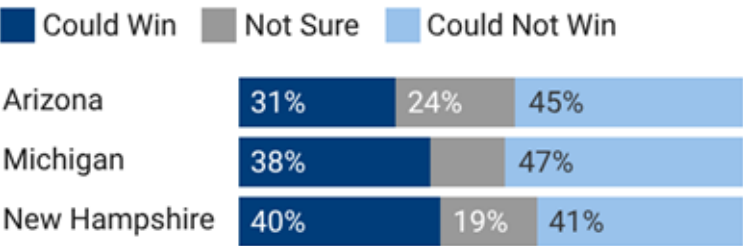
Josh Shapiro | AZ/MI/NH Toplines

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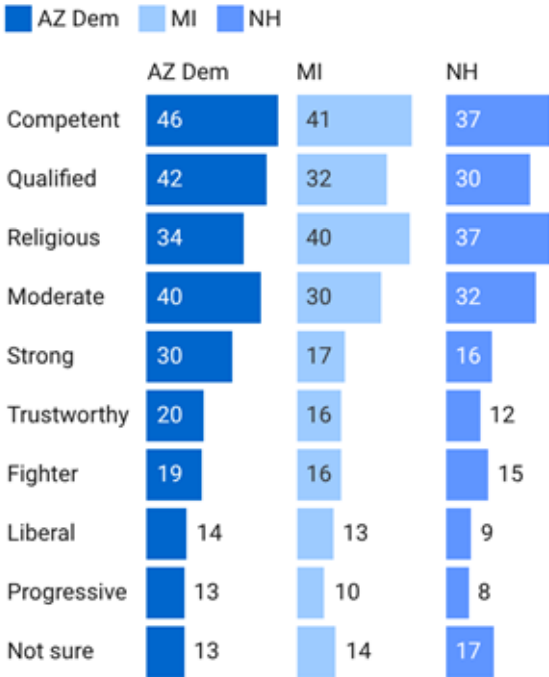
General Election Choice (All AZ Voters)



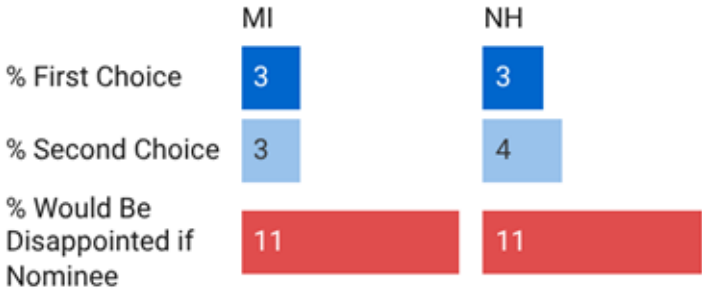
Ability to Win (Dems Only)



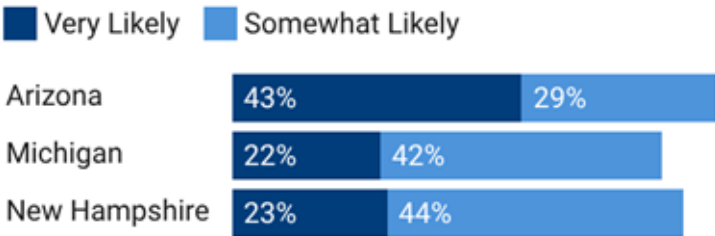
Traits Post Messaging (% Dems Selecting)



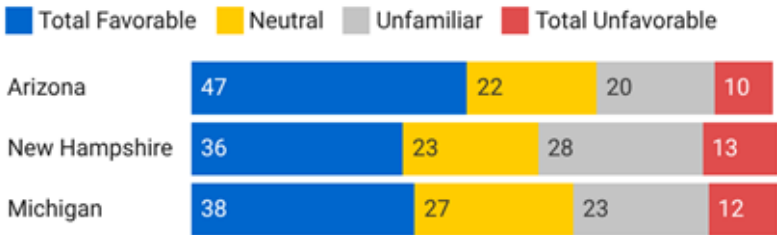
Primary Vote Choice



Willing to Consider Support Post Bio (Dems Only)



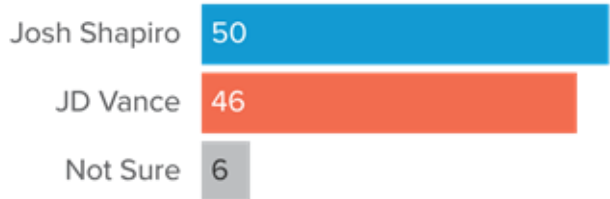
Personal Popularity (Dems Only)



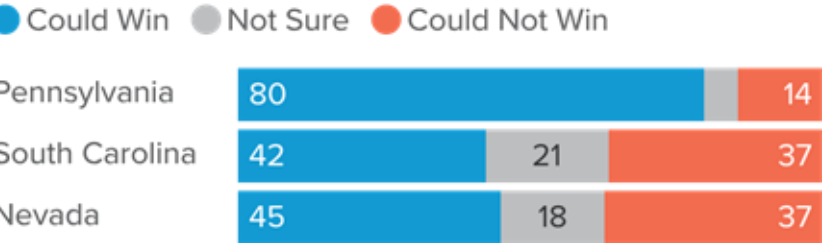
Josh Shapiro | PA/SC/NV Toplines

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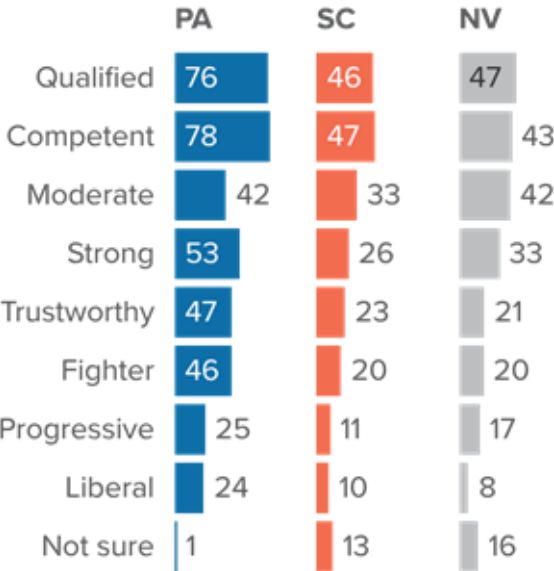
General Election Choice (All PA Voters)



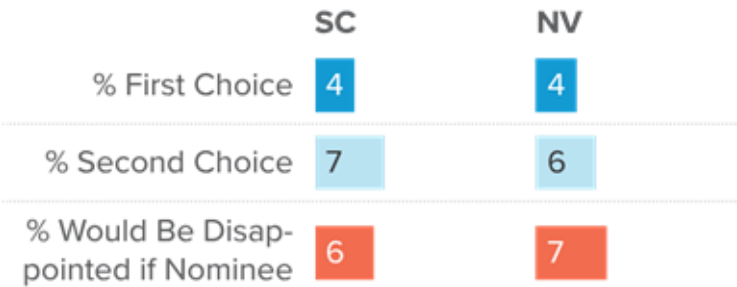
Ability to Win (Democrats)



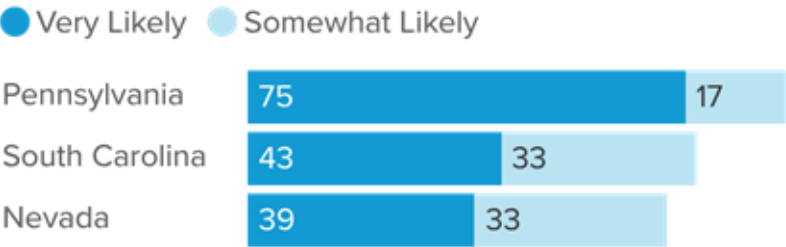
Traits Post-Messaging (% Democrats Selecting)



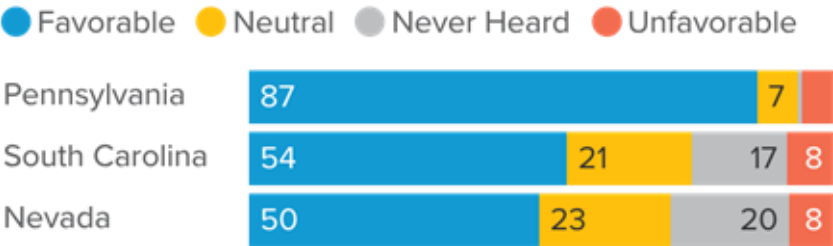
Primary Vote Choice



Willing to Consider Support Post Bio (Democrats)



Personal Popularity (Dems Only)





TOPLINES

Secretary Pete Buttigieg

Summary:

Former Transportation Secretary Pete Buttigieg leads the New Hampshire primary at 24% first-choice support, the Michigan primary (18%), and registers as voters' second-choice in Nevada (18%). His brand is well-defined and broadly known, with few Democrats unfamiliar with him and trait scores anchored by "competent" and "trustworthy". The headwinds are coalition- and credential-based: just 4% first-choice and 41% considering among Black voters in our October survey.

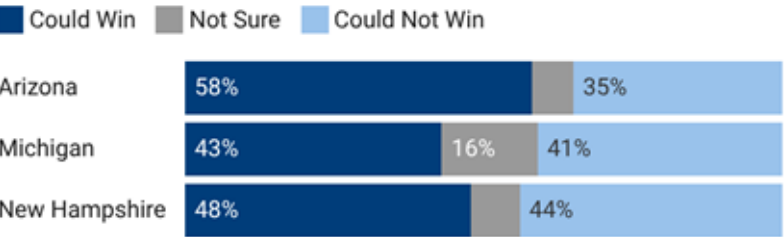
Pete Buttigieg | AZ/MI/NH Toplines

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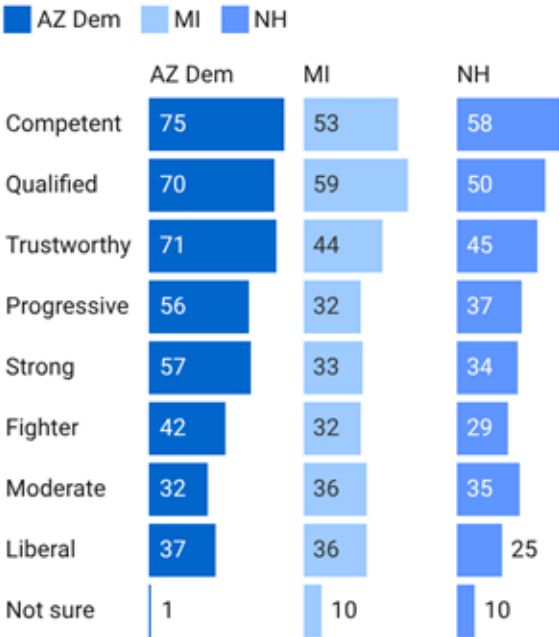
General Election Choice (All AZ Voters)



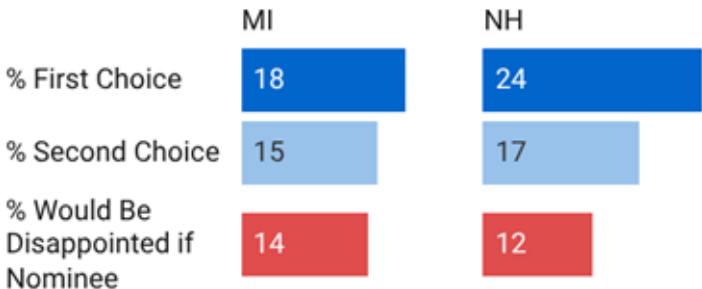
Ability to Win (Dems Only)



Traits Post Messaging (% Dems Selecting)



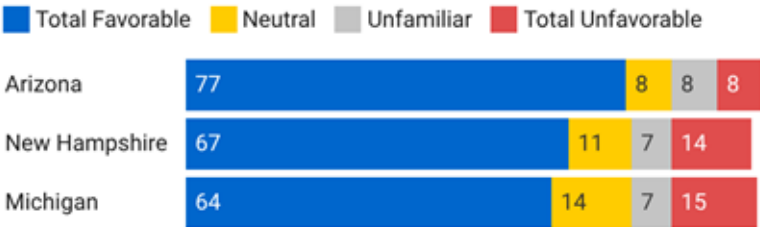
Primary Vote Choice



Willing to Consider Support Post Bio (Dems Only)



Personal Popularity (Dems Only)





TOPLINES

Vice President Kamala Harris

Summary:

Former Vice President Kamala Harris carries the heaviest baggage, but maintains foundational strength. Disappointment numbers of 25-38% across all four primary states (highest in every state) and explicit concerns rooted in her 2024 candidacy and Biden-administration record. However, disappointment drops to just 11-24% among Black Democrats in those same states. With Black voters in our October survey, she leads the field on many measures, making her the potential contender with the case to hold together the coalition that often decides Democratic primaries and powers any general election. But that pathway depends on rebuilding a coalition that is softer than many Democrats might assume

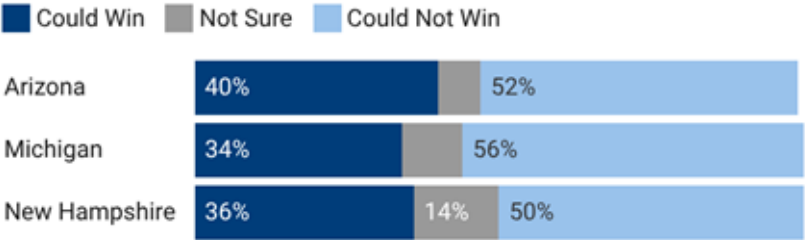
Kamala Harris | AZ/MI/NH Toplines

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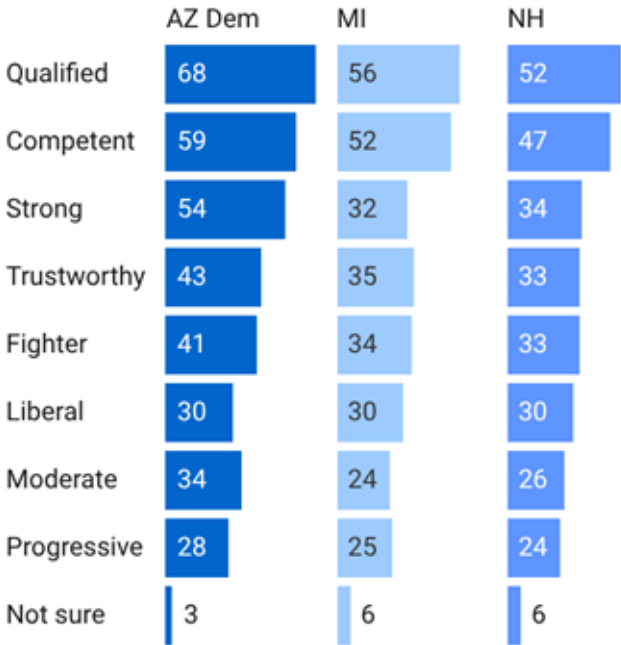
General Election Choice (All AZ Voters)



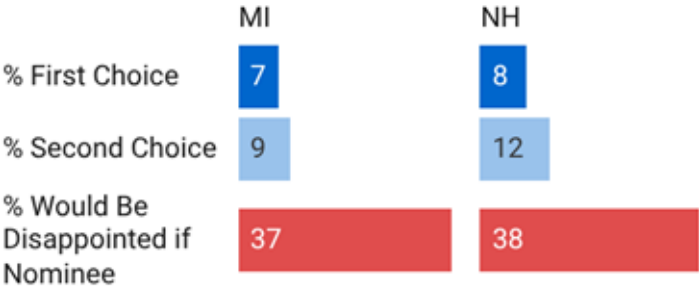
Ability to Win (Dems Only)



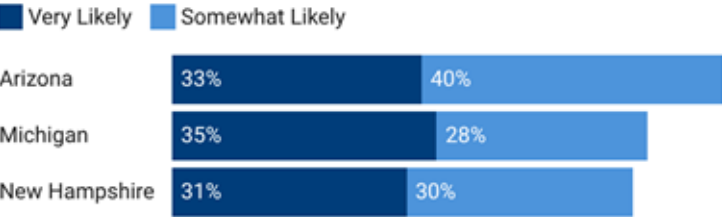
Traits Post Messaging (% Dems Selecting)



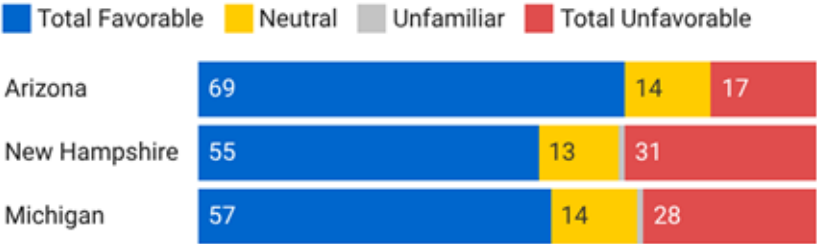
Primary Vote Choice



Willing to Consider Support Post Bio (Dems Only)



Personal Popularity (Dems Only)





TOPLINES

Governor JB Pritzker

Summary:

Illinois Governor JB Pritzker is a wild card - broadly recognized and credited by Democrats with the ability to win a general election but receives 2-3% first-choice support across every primary state. His low "trustworthy" scores (17-20%) reflect the weight of voter concerns. His path depends less on primary momentum than on the self-funding capacity and gubernatorial record that keep him viable if perceived first-tier contenders falter.

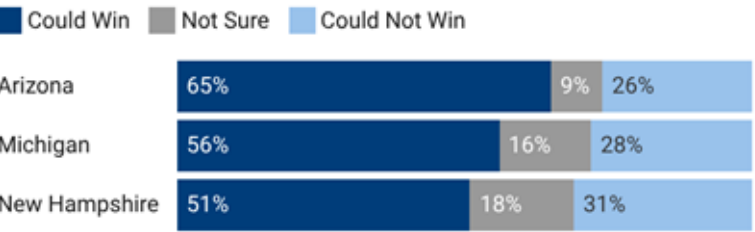
JB Pritzker | AZ/MI/NH Toplines

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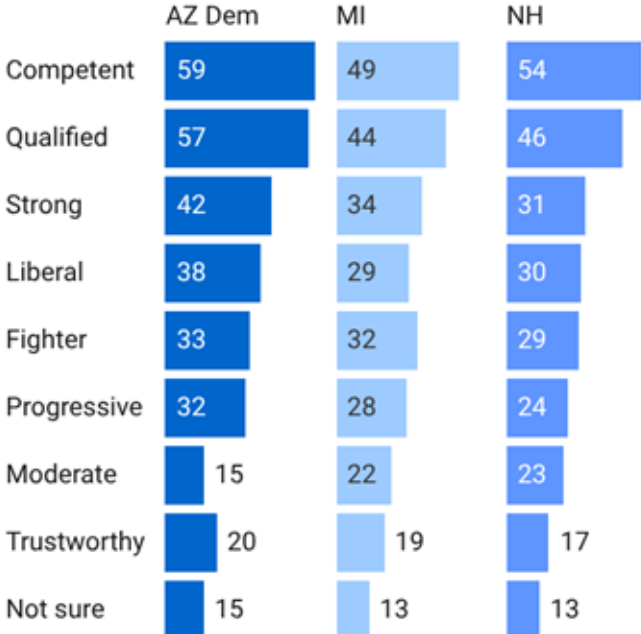
General Election Choice (All AZ Voters)



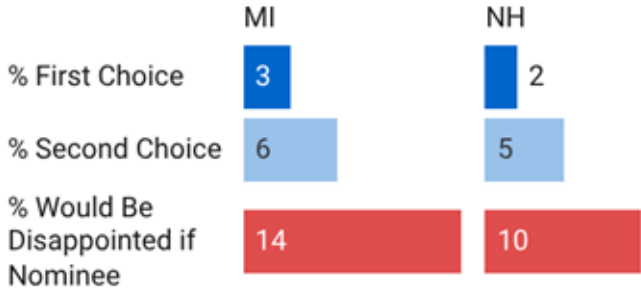
Ability to Win (Dems Only)



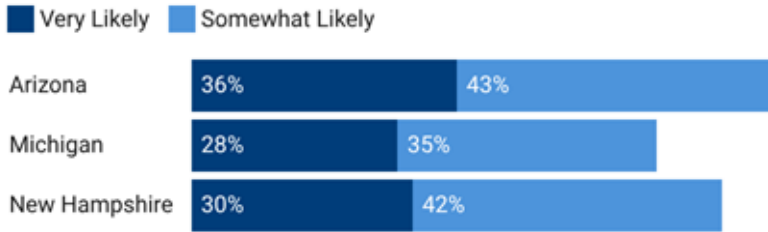
Traits Post Messaging (% Dems Selecting)



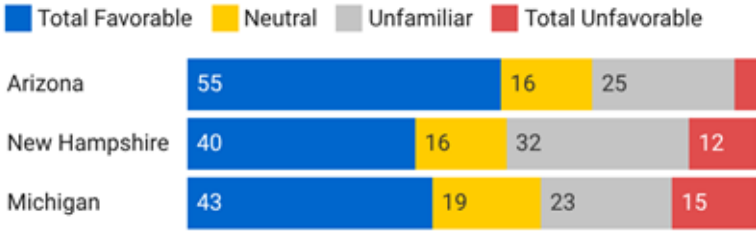
Primary Vote Choice



Willing to Consider Support Post Bio (Dems Only)



Personal Popularity (Dems Only)





TOPLINES

Governor Gavin Newsom

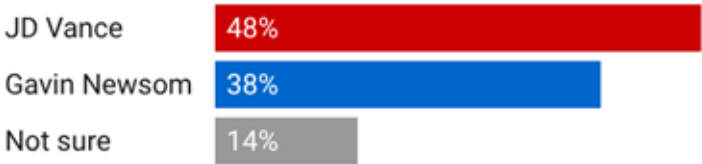
Summary:

California Governor Gavin Newsom leads the primary (at the time of surveys) in Nevada (27%) and South Carolina (21%) and runs second among Black voters (25% first-choice), making his coalition footprint one of the strongest in the field. But that primary strength meets sharp general-election resistance. Newsom trails Vance in Arizona by ten (38-48) and runs behind in Pennsylvania (46-48). Disappointment with him as nominee runs high in NH (23%) and MI (22%)

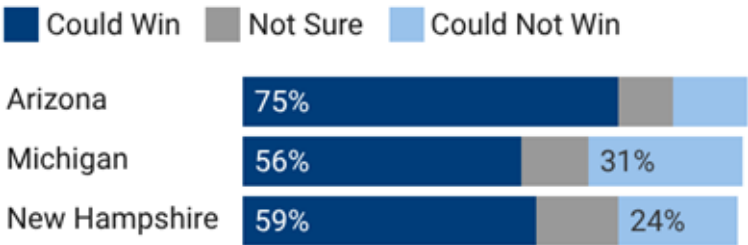
Gavin Newsom | AZ/MI/NH Toplines

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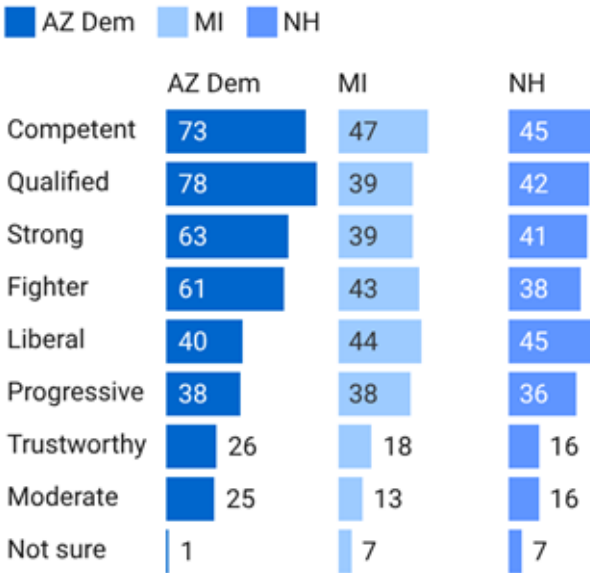
General Election Choice (AZ All Voters)



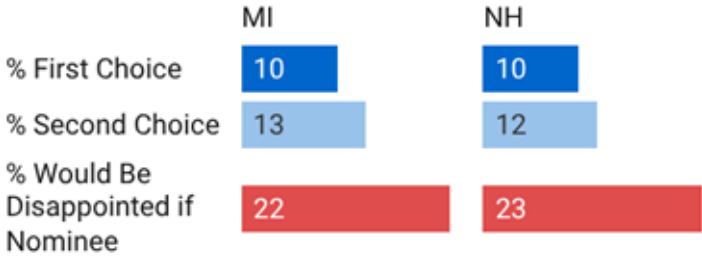
Ability to Win (Dems Only)



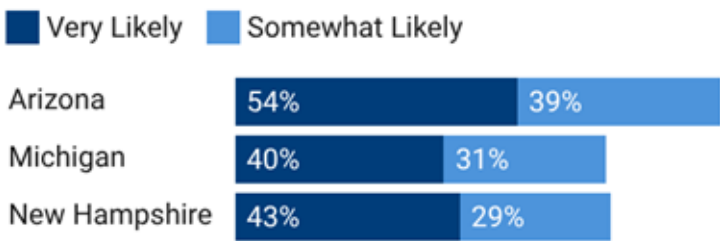
Traits Post Messaging (% Dems Selecting)



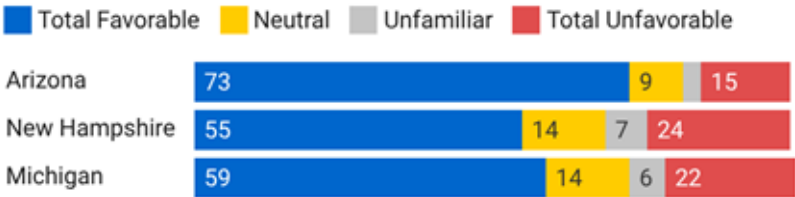
Primary Vote Choice



Willing to Consider Support Post Bio (Dems Only)



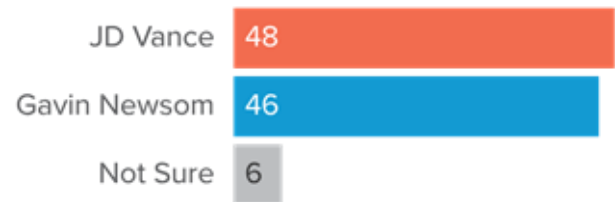
Personal Popularity (Dems Only)



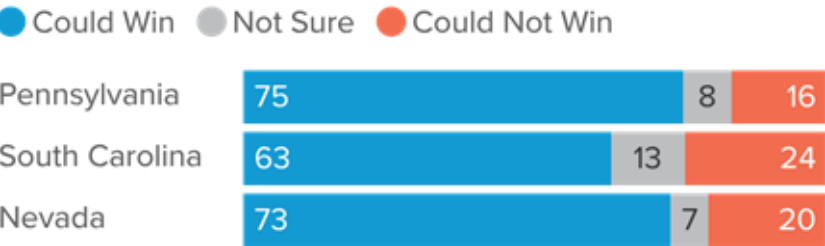
Gavin Newsom | PA/SC/NV Toplines

JANUARY-FEBRUARY 2026

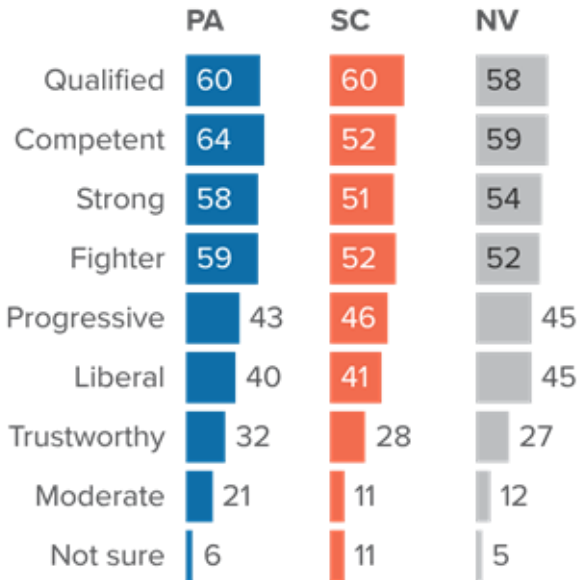
General Election Choice (All PA Voters)



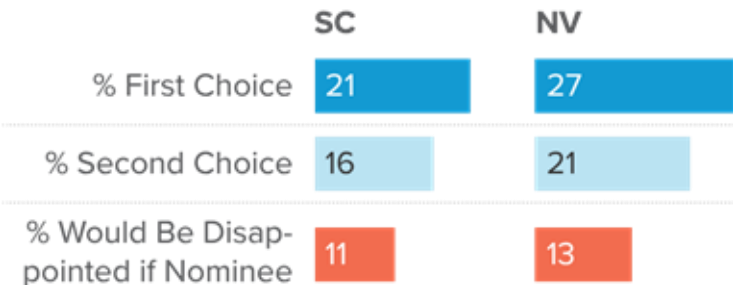
Ability to Win (Democrats)



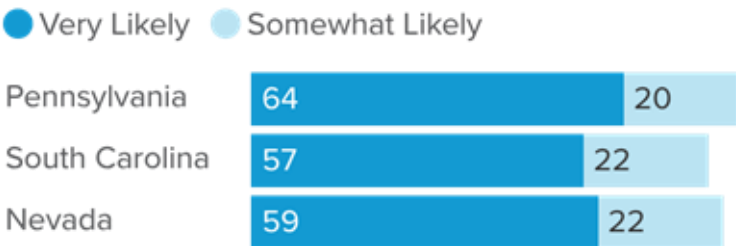
Traits Post-Messaging (% Democrats Selecting)



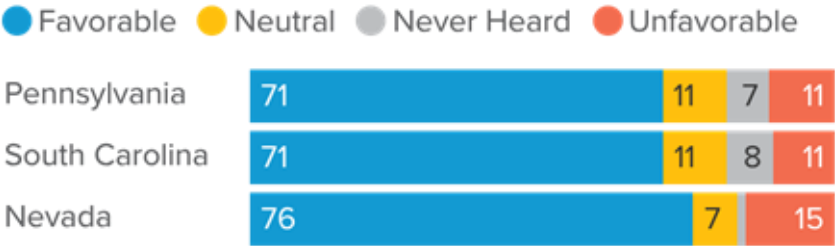
Primary Vote Choice



Willing to Consider Support Post Bio (Democrats)



Personal Popularity (Dems Only)





TOPLINES

Rahm Emanuel

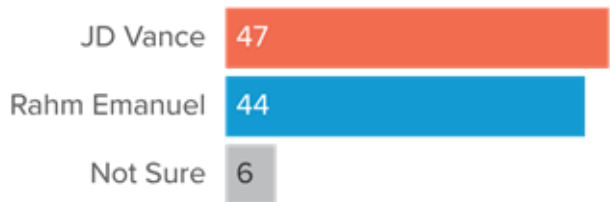
Summary:

Former Mayor and U.S. Ambassador to Japan Rahm Emanuel registers a low primary footprint (0-1% first-choice support across all four early states), and disappointment numbers of 19-24%. His "trustworthy" scores fall to between 8% and 17% in PA, SC, and NV, reflecting the weight of a substantive concerns.

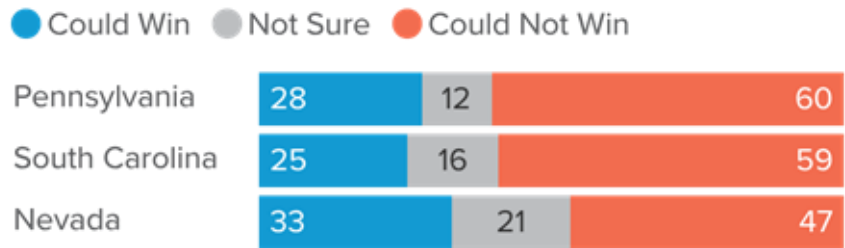
Rahm Emanuel | PA/SC/NV Toplines

JANUARY-FEBRUARY 2026

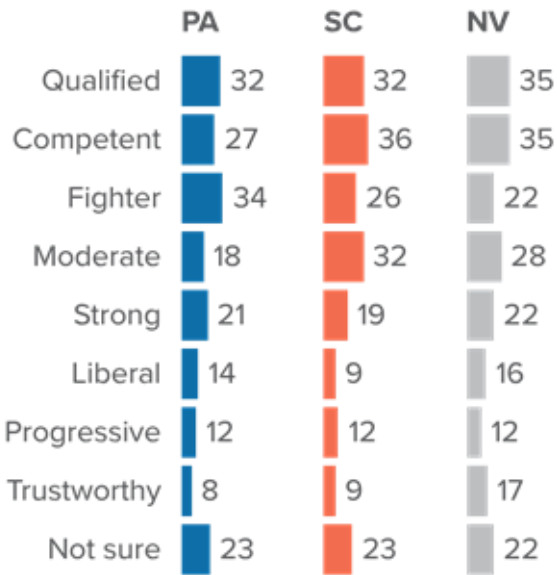
General Election Choice (All PA Voters)



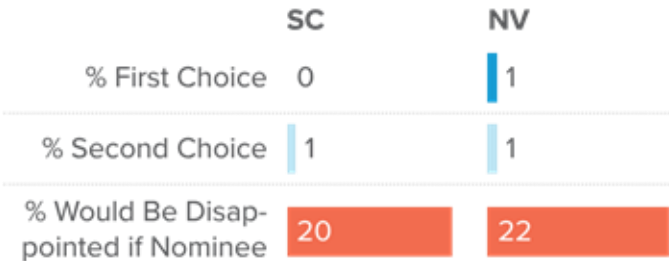
Ability to Win (Democrats)



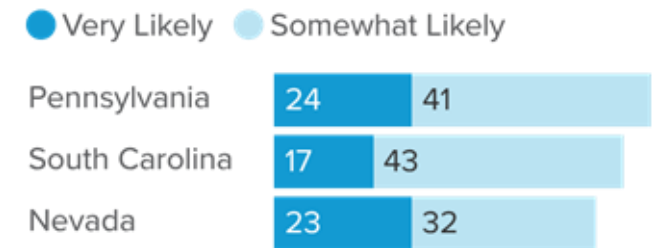
Traits Post-Messaging (% Democrats Selecting)



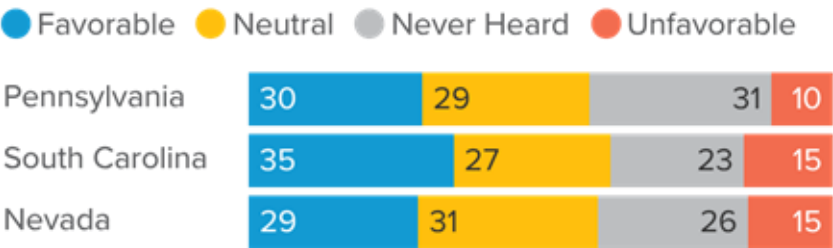
Primary Vote Choice



Willing to Consider Support Post Bio (Democrats)



Personal Popularity (Dems Only)





TOPLINES

Rep. Alexandria Ocasio-Cortez

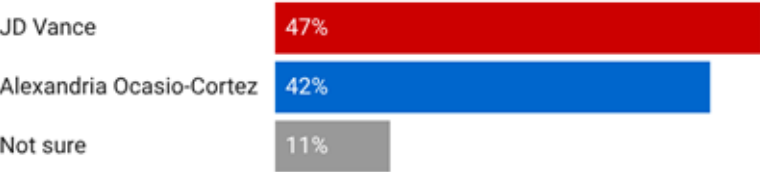
Summary:

U.S. Representative Alexandria Ocasio-Cortez owns the generational trend, leading 18-34 first-choice support in New Hampshire (27%) and Nevada (33%), and running a strong among young voters in Michigan and South Carolina. Her brand is clearly defined, with the field's highest "progressive" (55-71%) and "fighter" (45-65%) trait scores. But that strength runs into resistance: disappointment stays between 19% and 24% across all four primary states, and Democratic perception of her "ability to win" lands among the lowest in the field (30-39%). She trails Vance in Arizona (47%-42%) and Pennsylvania (48%-44%).

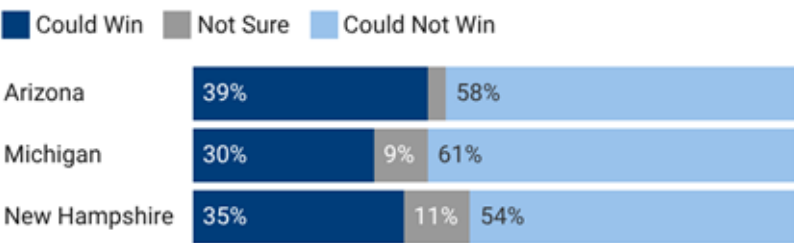
Alexandria Ocasio-Cortez | AZ/MI/NH Toplines

APRIL 2026

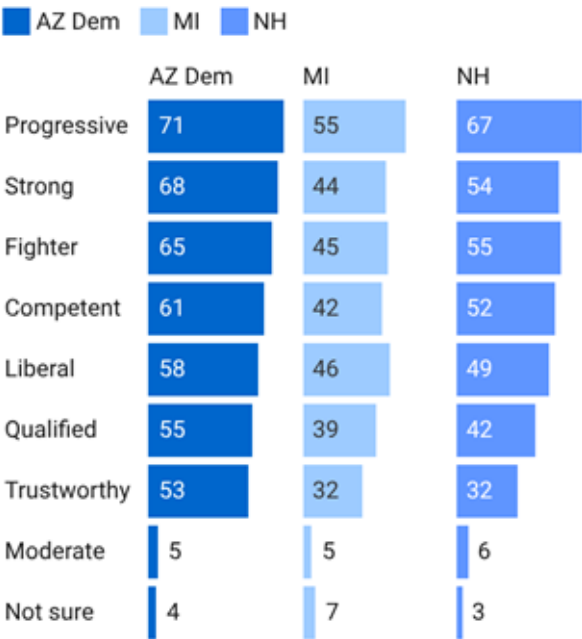
General Election Choice (All AZ Voters)



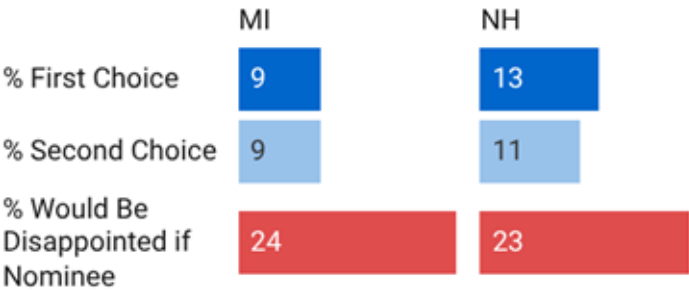
Ability to Win (Dems Only)



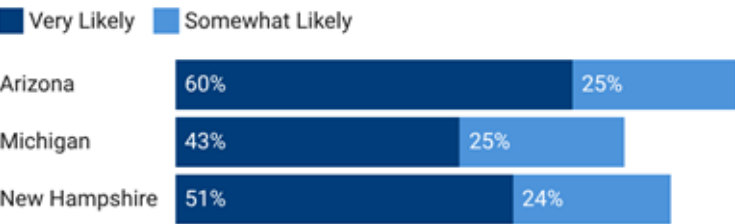
Traits Post Messaging (% Dems Selecting)



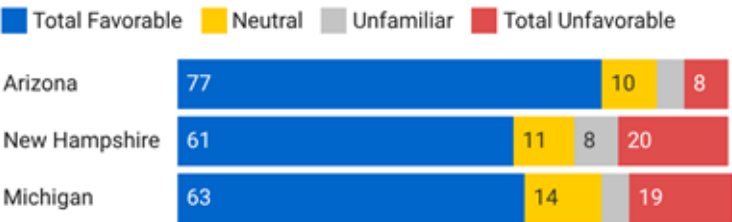
Primary Vote Choice



Willing to Consider Support Post Bio (Dems Only)



Personal Popularity (Dems Only)



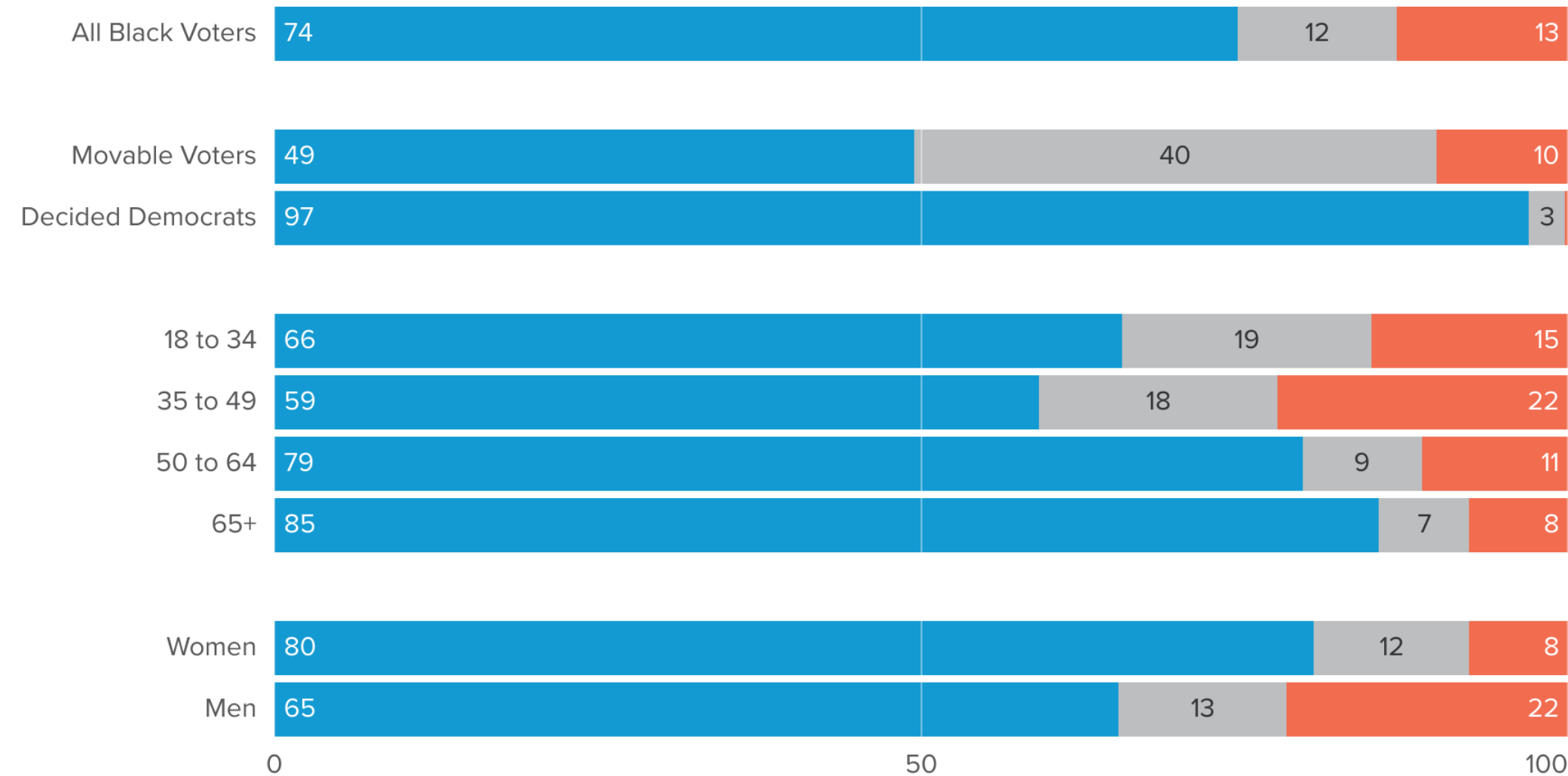
Black Voters' Support Remains Foundational

Black voters remain the most reliably Democratic voting bloc in the country, but in our October survey across Georgia, Michigan, North Carolina, and South Carolina, just 74% commit to the Democratic nominee on a generic ballot. That's a coalition can be rebuilt, but is not automatic

Generic Presidential Ballot

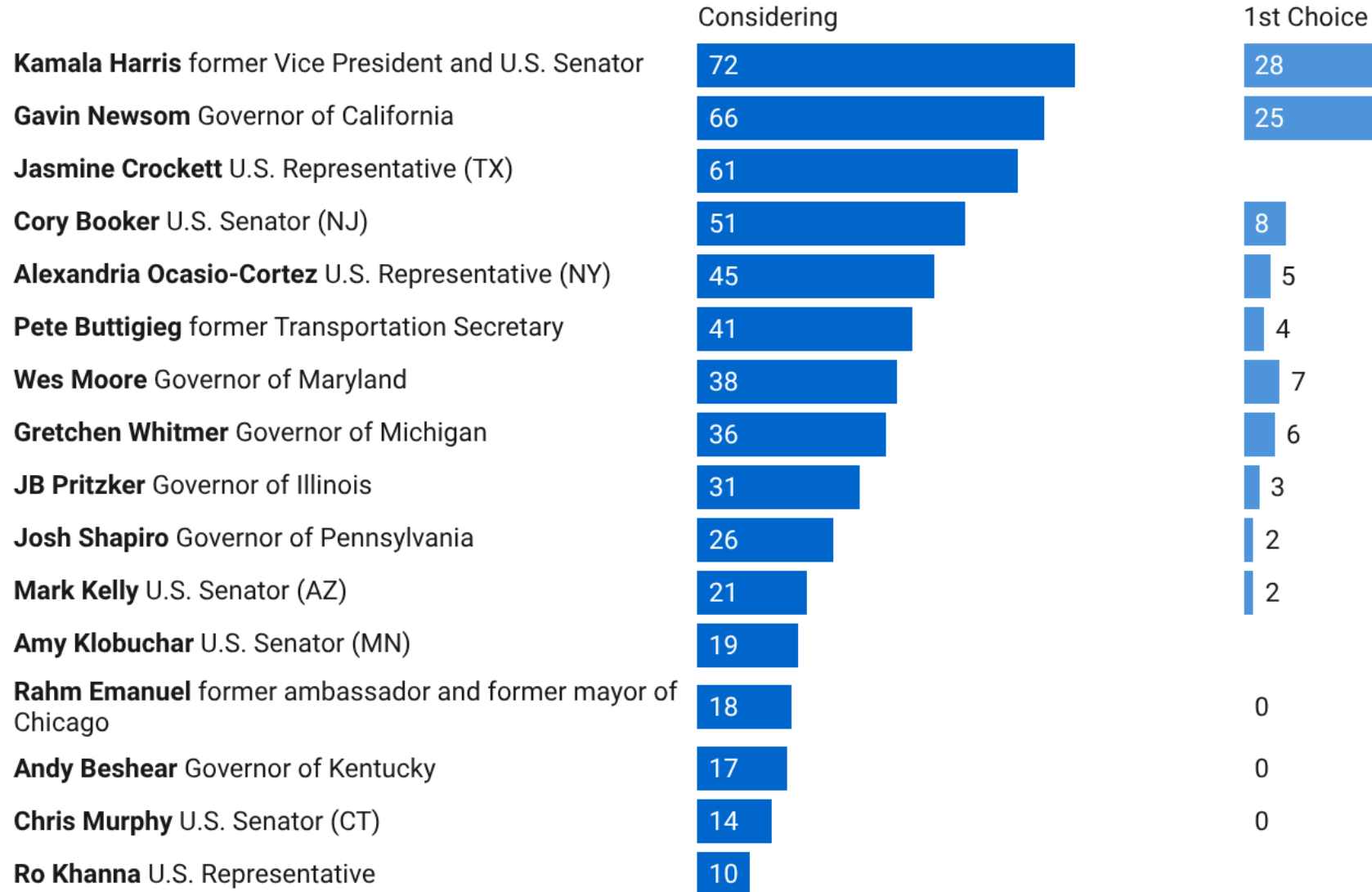
Among All Black Voters in
Georgia, Michigan, North
Carolina, and South Carolina

● The Democratic nominee ● Not sure ● The Republican nominee



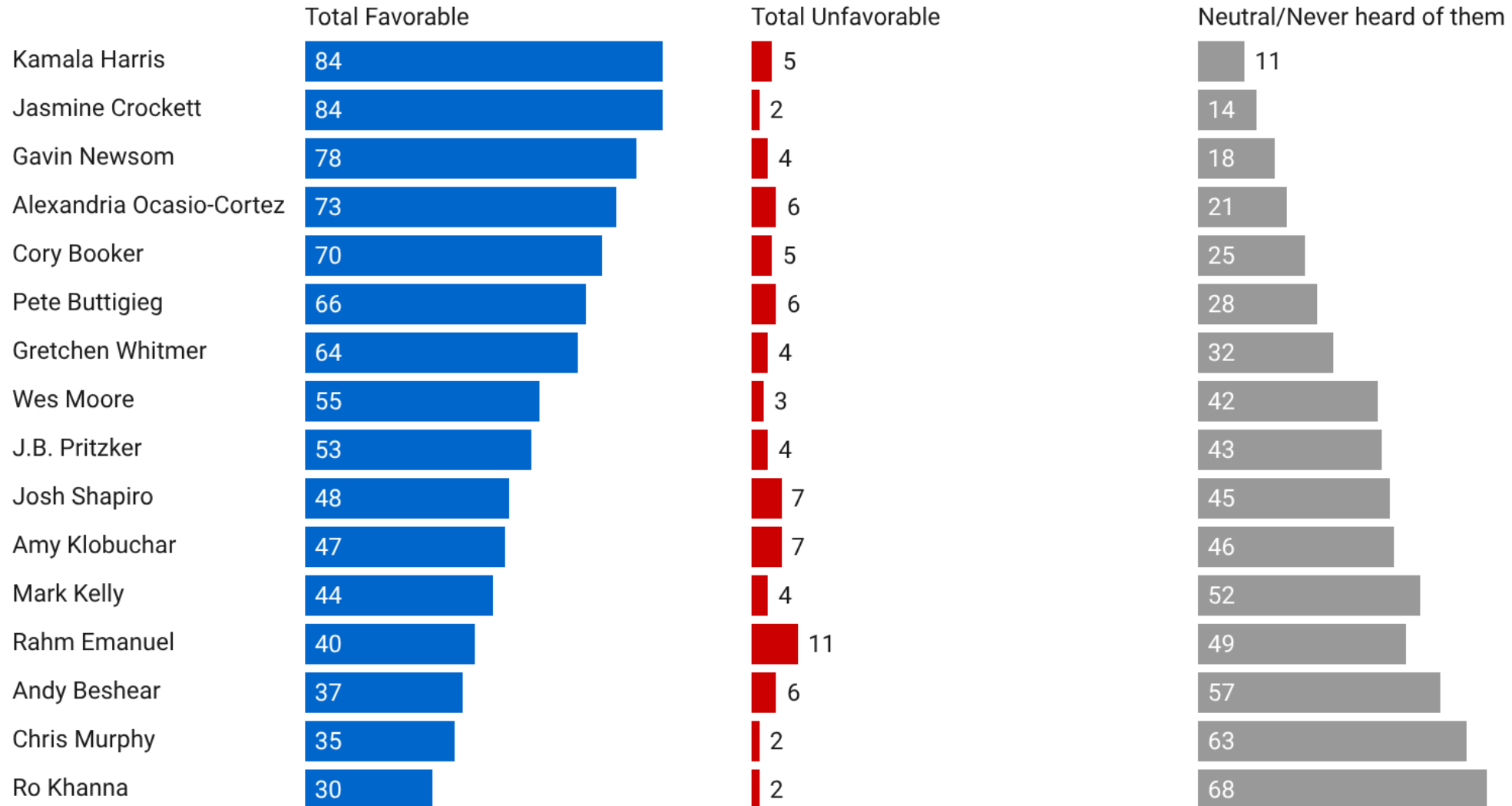
2028 Primary Preference

Among All Black Voters in
Georgia, Michigan, North
Carolina, and South Carolina



Favorability of Leaders (Among Democrats)

Among All Black Voters in
Georgia, Michigan, North
Carolina, and South Carolina



What This Means

What This Means

1. **The winning lane runs through practical-progressive economic credibility.** Across Pennsylvania, South Carolina, and Nevada, 46-51% of Democratic primary voters say they want a new-generation candidate with a practical approach to win back working-class voters. No candidate has yet consolidated this constituency, and the field's strongest performers on "competent" and "moderate" traits are also the least known to voters. The contender who reaches this lane first likely reshapes the race
2. **Primary momentum and general-election viability are diverging (potential structural risk for Democrats).** The leaders strongest in primary states (Newsom in NV/SC, Harris's brand strength among Black voters, Buttigieg in NH/MI) face some of the steepest general-election headwinds against Vance. Can potential frontrunners like Mark Kelly break through to build momentum and capture voters' imagination for the future - among younger voters in particular?
3. **Name recognition is the most fixable disadvantage in the field.** 2026 is the defining year for upside potential contenders. Governors Beshear and Moore draw just 1-5% first-choice primary support but 65-84% consideration after voters see their biographies. The leader who introduces themselves first, most clearly, and at scale can leap into the top tier. Late introductions in a compressed primary calendar will be far costlier than early ones. Can less-known governors like Andy Beshear, including those who are up for re-election like Wes Moore, JB Pritzker, and Josh Shapiro, break through the noise to preview their case?
4. **The Black voter coalition is rebuildable but not automatic. Economic credibility outweighs identity.** Just 74% of Black voters across GA, MI, NC, and SC commit to the Democratic nominee on a generic ballot, with significant softness among younger Black voters and Black men. Democrats need to deliver a governing record and economic message that meets voters where they are
5. **JD Vance, Marco Rubio are both strong contenders. Only some Democrats can likely compete against either.** Vance underperforms Trump's 2024 margins, but most Democrats still trail him in Arizona and run even in Pennsylvania. Rubio polls stronger than Vance in nearly every Arizona matchup tested. The movable and persuadable voters in Pennsylvania and Arizona are winnable, but only by a Democrat who can hold the base, expand into working-class voters, and speak credibly to a cost-of-living electorate that maintains 2024-era pessimism (63% "falling behind cost of living" in AZ)

Methodology

Overview: In partnership with Change Research, Future Majority has conducted three major polling waves over the last eight months across the states that will likely influence the 2028 Democratic nomination and the general election. All surveys were conducted using Change Research's Dynamic Online Sampling.

April 2026 Wave:

- 1,123 Democratic primary voters in New Hampshire (April 16-21, 2026)
- 1,029 Democratic primary voters in Michigan (April 16-21, 2026)
- 1,048 general election voters in Arizona (April 15-21, 2026)

January–February 2026 Wave:

- 1,350 general election voters in Pennsylvania (January 30-February 2, 2026)
- 1,018 Democratic primary voters in South Carolina (January 31-February 5, 2026)
- 806 Democratic primary voters in Nevada (January 31-February 5, 2026)

October 2025 Wave:

- 1,249 general election voters in Pennsylvania (October 2-7, 2025)
- 1,018 Black voters across Georgia, Michigan, North Carolina, and South Carolina (October 2-9, 2025)

Primary-state rules: New Hampshire holds a semi-open presidential primary - registered Democrats and "undeclared" (Independent) voters may cast a ballot in the Democratic primary, while registered Republicans cannot. Michigan does not register voters by party, so any registered voter who requests a Democratic ballot may participate. Nevada holds a closed Democratic presidential primary, in which only registered Democrats are eligible to participate. South Carolina holds an open presidential primary, in which any registered voter may participate regardless of party affiliation.



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