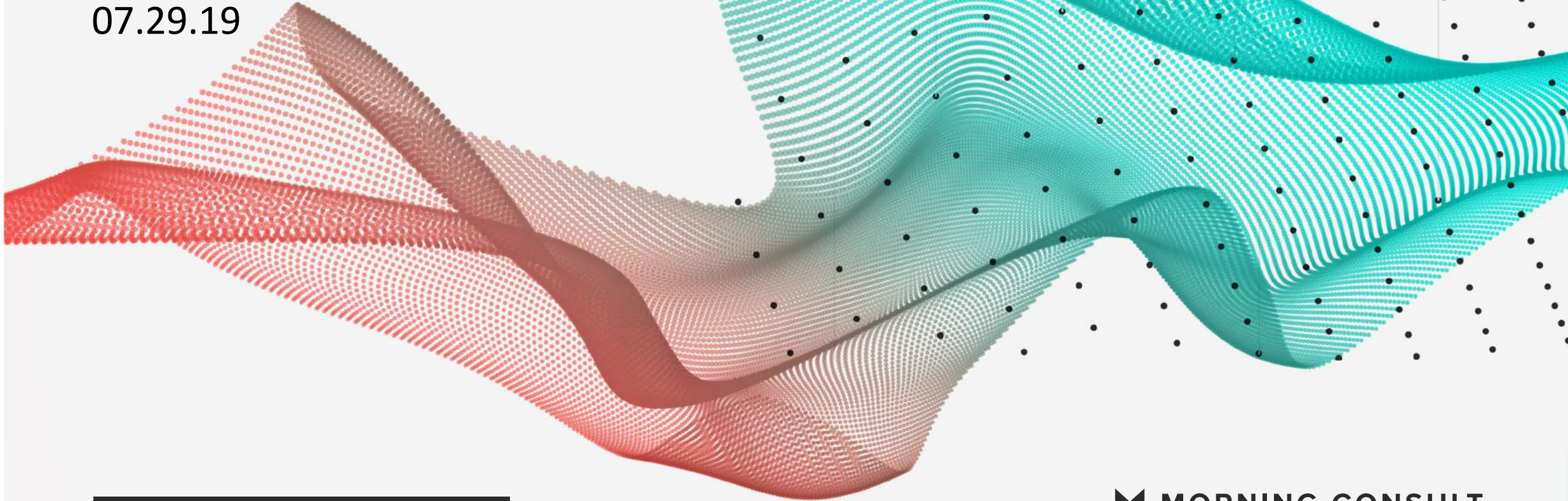


POLITICAL INTELLIGENCE /

07.29.19



2020 PRIMARIES /

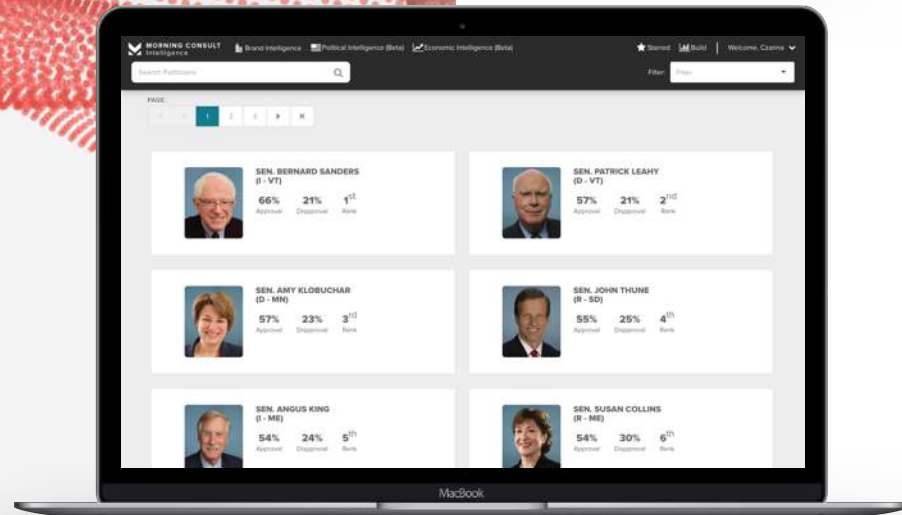
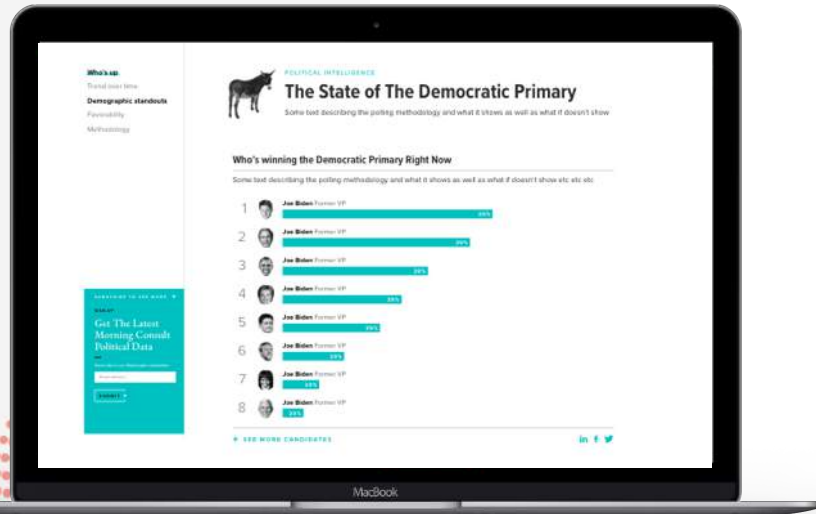
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ABOUT POLITICAL INTELLIGENCE

Morning Consult is setting a new standard for survey research.

On a daily basis, Morning Consult interviews over 5,000 registered voters across the United States. Along with 2020 presidential election data, Political Intelligence tracks the approval and electability for all governors, senators, House members, the President, and more at the national, state, and congressional district level.

Each week, this report will use that data to deliver key new insights on where voters stand.

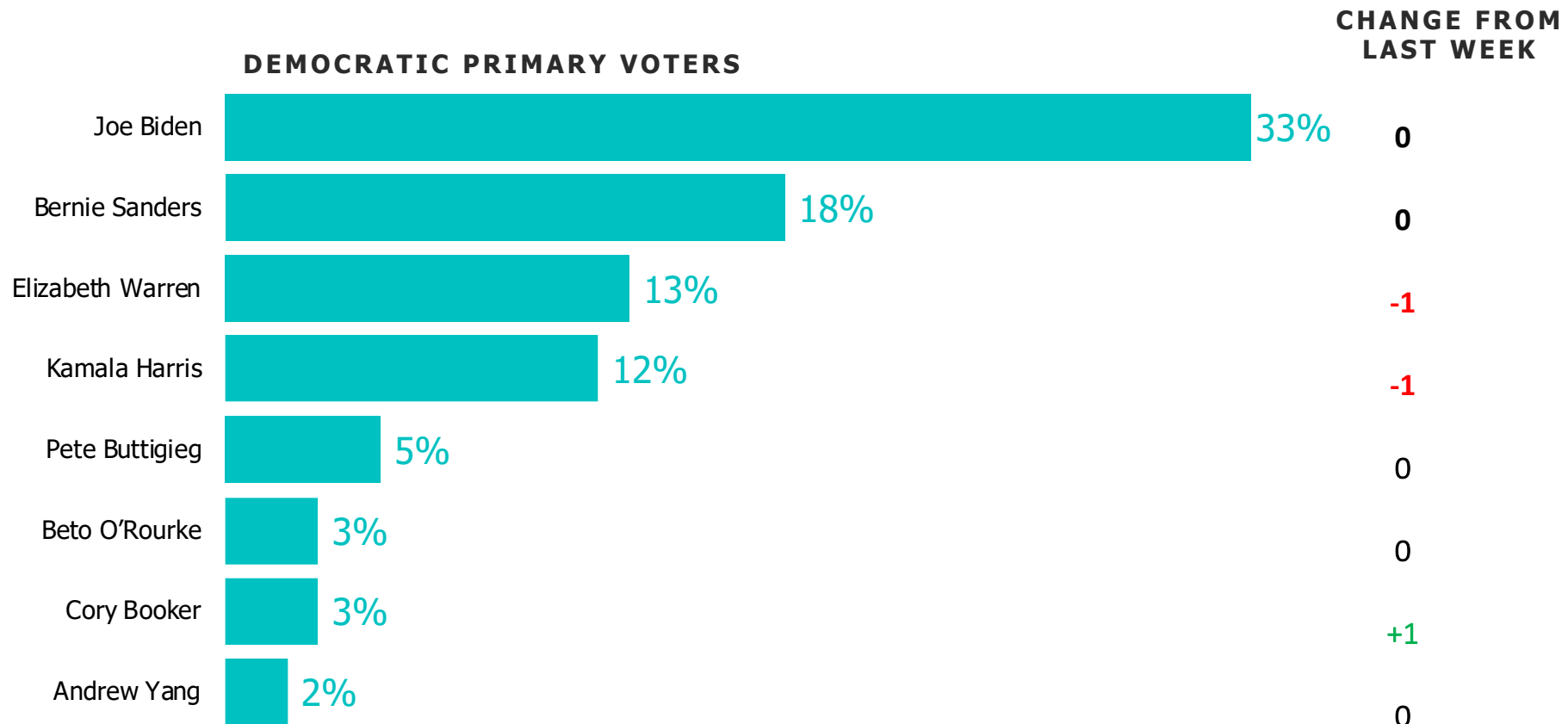


KEY TAKEAWAYS / 07.29.19

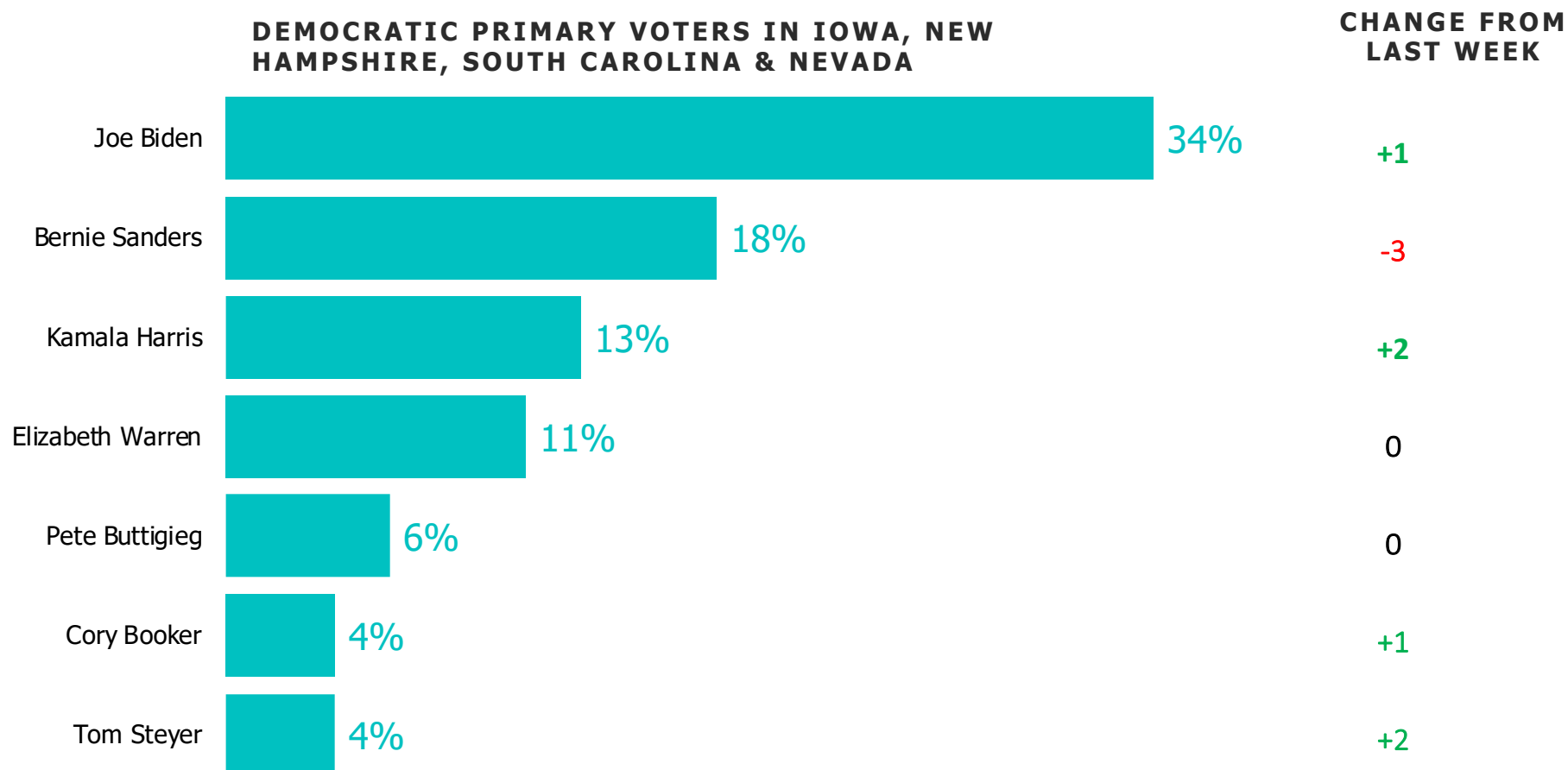
1. **The front-runners are weakened heading into the second round of debates.** Biden is 9-points down from his standing before the June debates and Sanders is 3-points down. Harris and Warren enter the second round of debates on much stronger footing, while Buttigieg, O'Rourke, and Booker are largely the same.
2. **Biden has a strong lead with moderate and conservative Democratic primary voters:** 51% of potential Democratic primary voters consider themselves liberal, 32% say they're moderate, and 10% identify as conservative. While Biden is winning with each group, his lead is notably stronger with moderates and conservatives.
3. **Tom Steyer shows signs of support in early primary states:** Standing at just 1% nationally, Steyer has 4% of the vote share in the combined early primary state demo, that includes voters in New Hampshire, Iowa, South Carolina, and Nevada.



WHO'S LEADING THE DEMOCRATIC PRIMARY / ALL DEMOCRATIC PRIMARY VOTERS

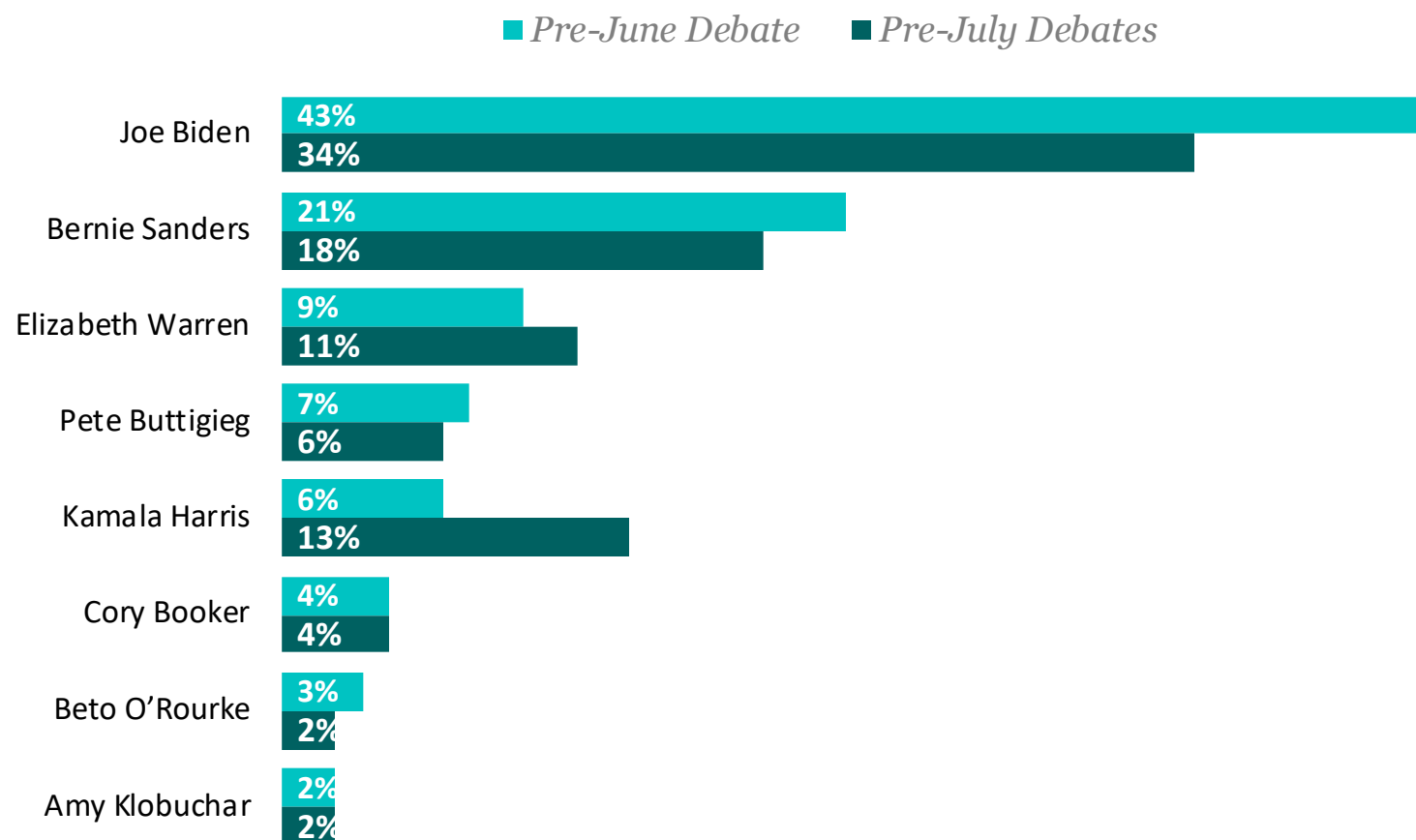


WHO'S LEADING THE DEMOCRATIC PRIMARY / EARLY PRIMARY STATES



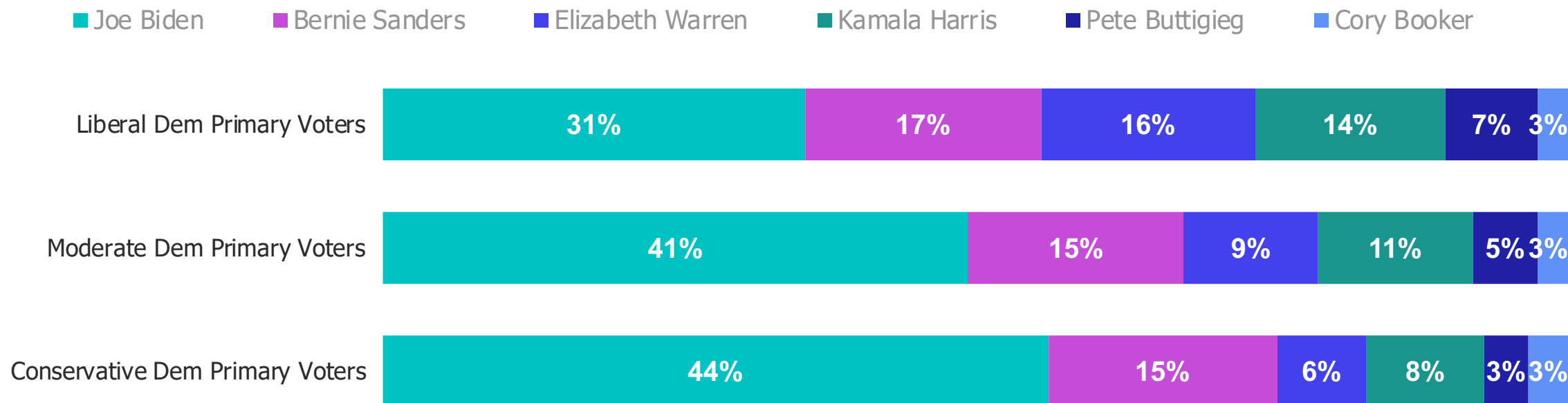
THE STATE OF THE RACE HEADING INTO THE DEBATES

First-place vote share in the week before the June debates and the week before the July debates



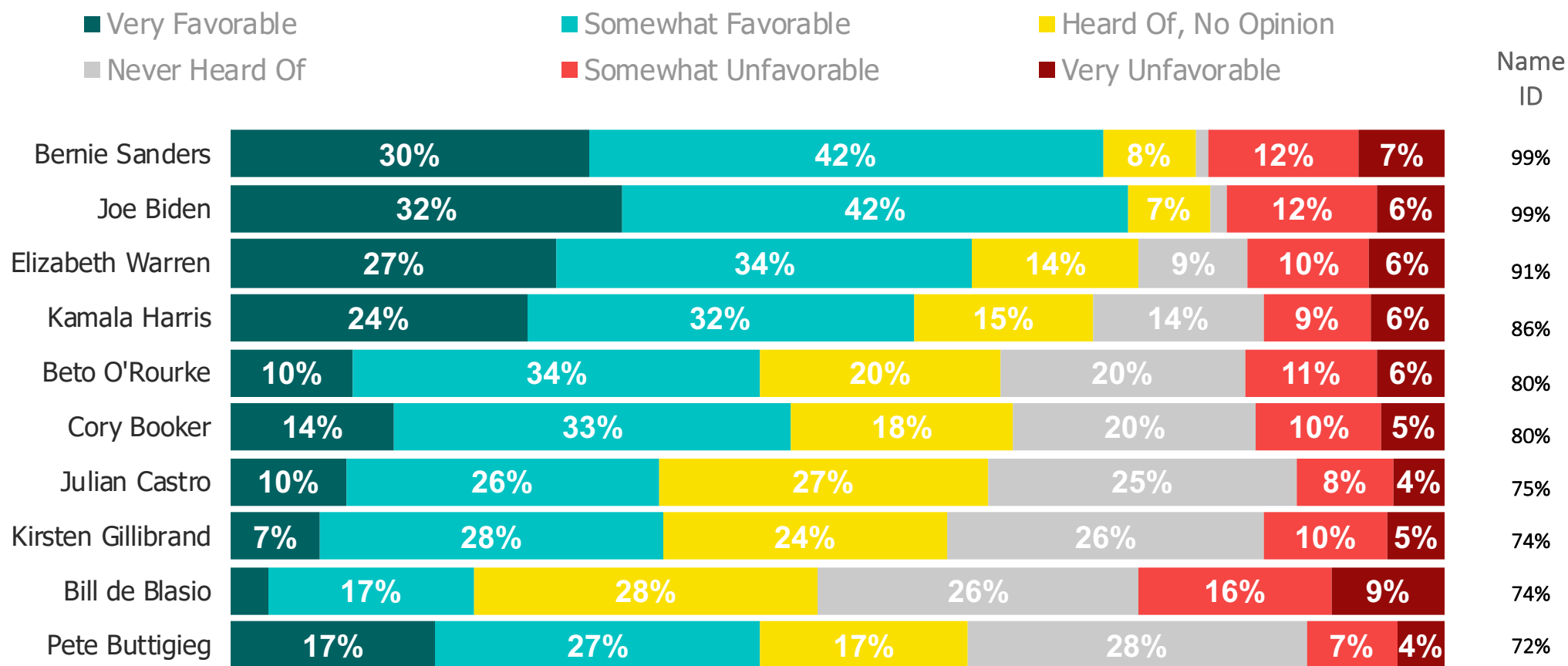
BIDEN HAS LESS COMPETITION IN THE MODERATE/CONSERVATIVE LANE

Fifty-one percent of potential Democratic primary voters consider themselves liberal, 32 percent say they're moderate, and 10 percent identify as conservative (another 7 percent don't identify with a particular ideology). While Biden is winning with each group, his lead is notably stronger with moderates and conservatives:



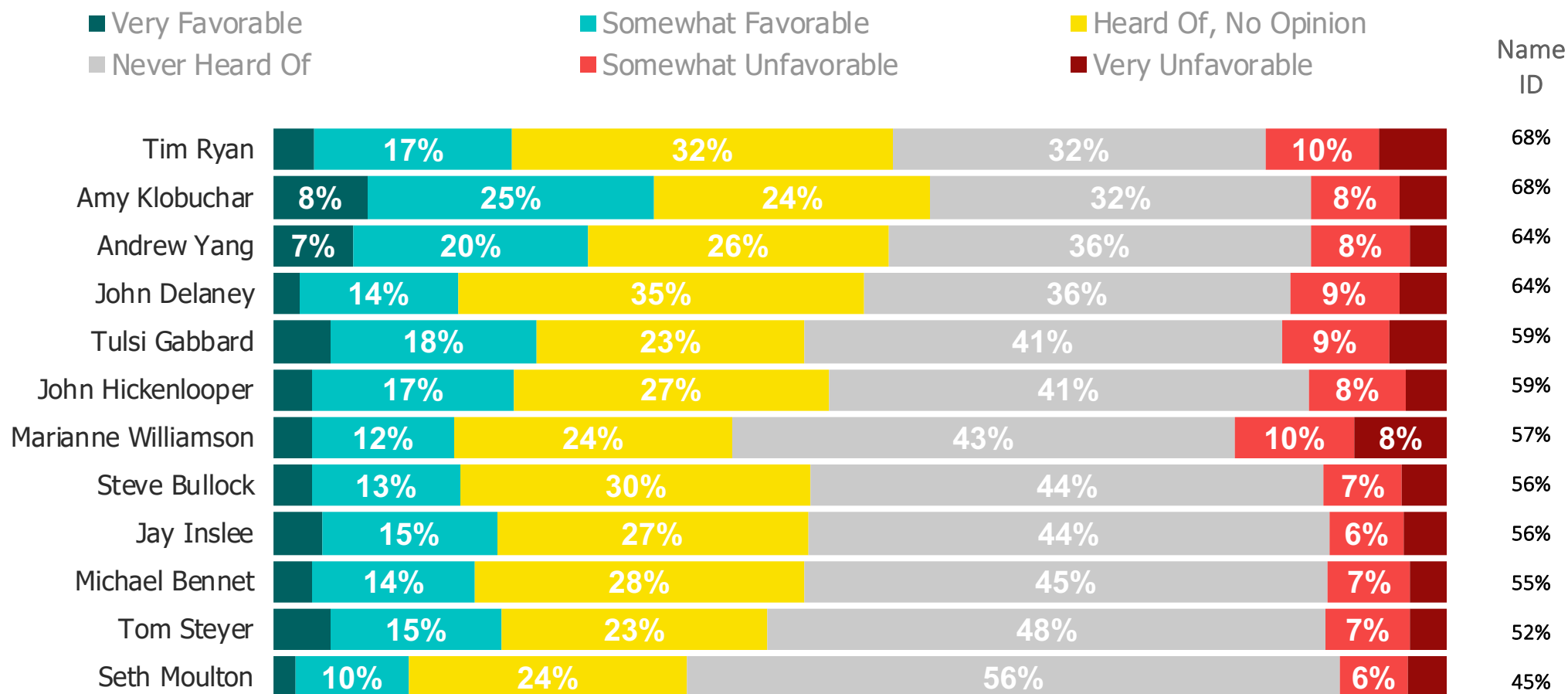
TRACKING FAVORABILITY AND NAME RECOGNITION

Ordered by name ID



TRACKING FAVORABILITY AND NAME RECOGNITION

Ordered by name ID



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METHODOLOGY /

This week's report features surveys with registered voters conducted from July 22, 2019 to July 28, 2019. 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.

Our Democratic Primary results are reported using 16,959 interviews with registered voters who indicate they may vote in the Democratic primary or caucus. For those who say don't know or no opinion, they are asked to pick a candidate they are learning towards, which are factored into the results. The margin of error for potential Democratic primary voters is +/- 1%.

Which Candidates Have Momentum in Early Primary States?

We have included an 'Early Primary States' demographic throughout this report to showcase who has momentum going into the primary elections. The numbers reflect voters who live in Iowa, New Hampshire, South Carolina, and Nevada.

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