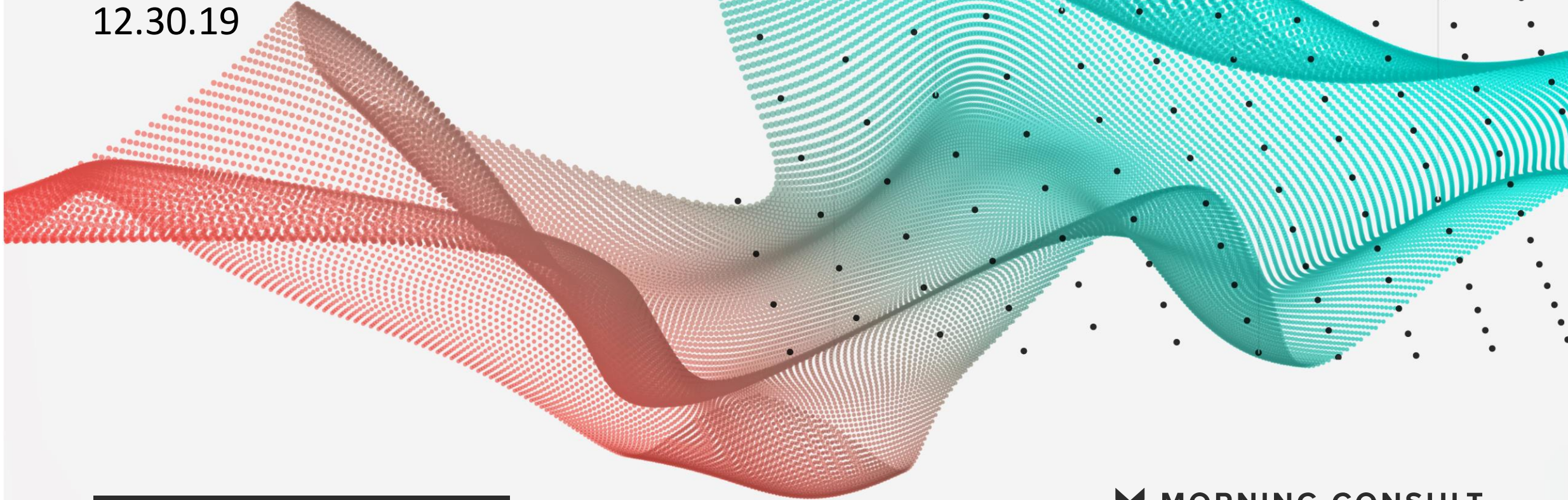


POLITICAL INTELLIGENCE /

12.30.19



2020 PRIMARIES /

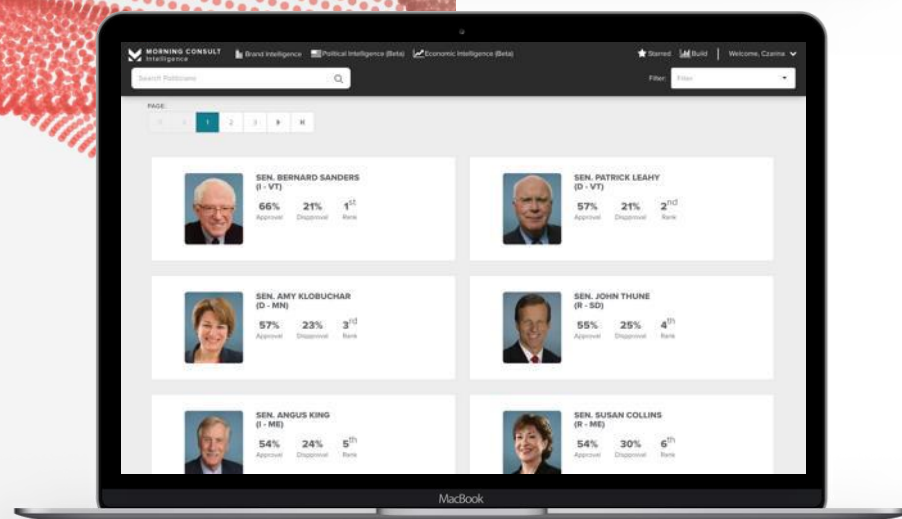
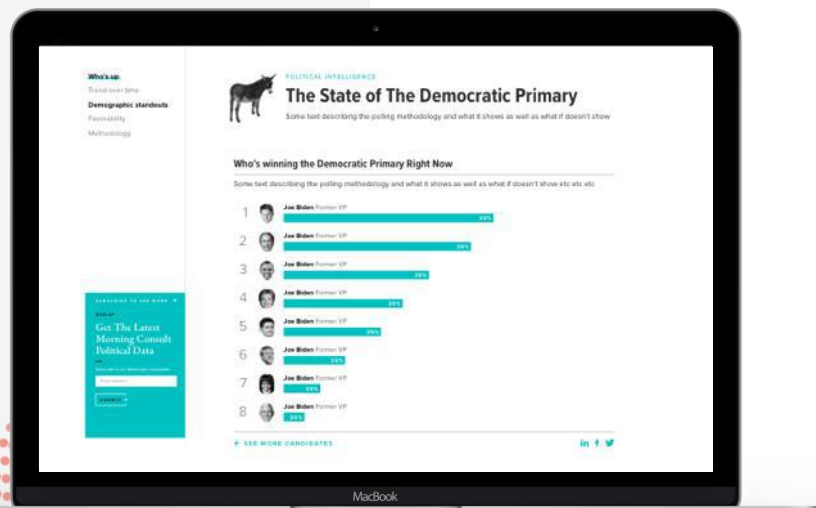
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ABOUT POLITICAL INTELLIGENCE

Morning Consult sets a new standard for survey research.

Every day, Morning Consult interviews more than 5,000 registered voters across the United States. Along with 2020 presidential election data, Political Intelligence tracks the approval and electability of the president, all governors, senators, House members and more at national, state, and congressional district levels.

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

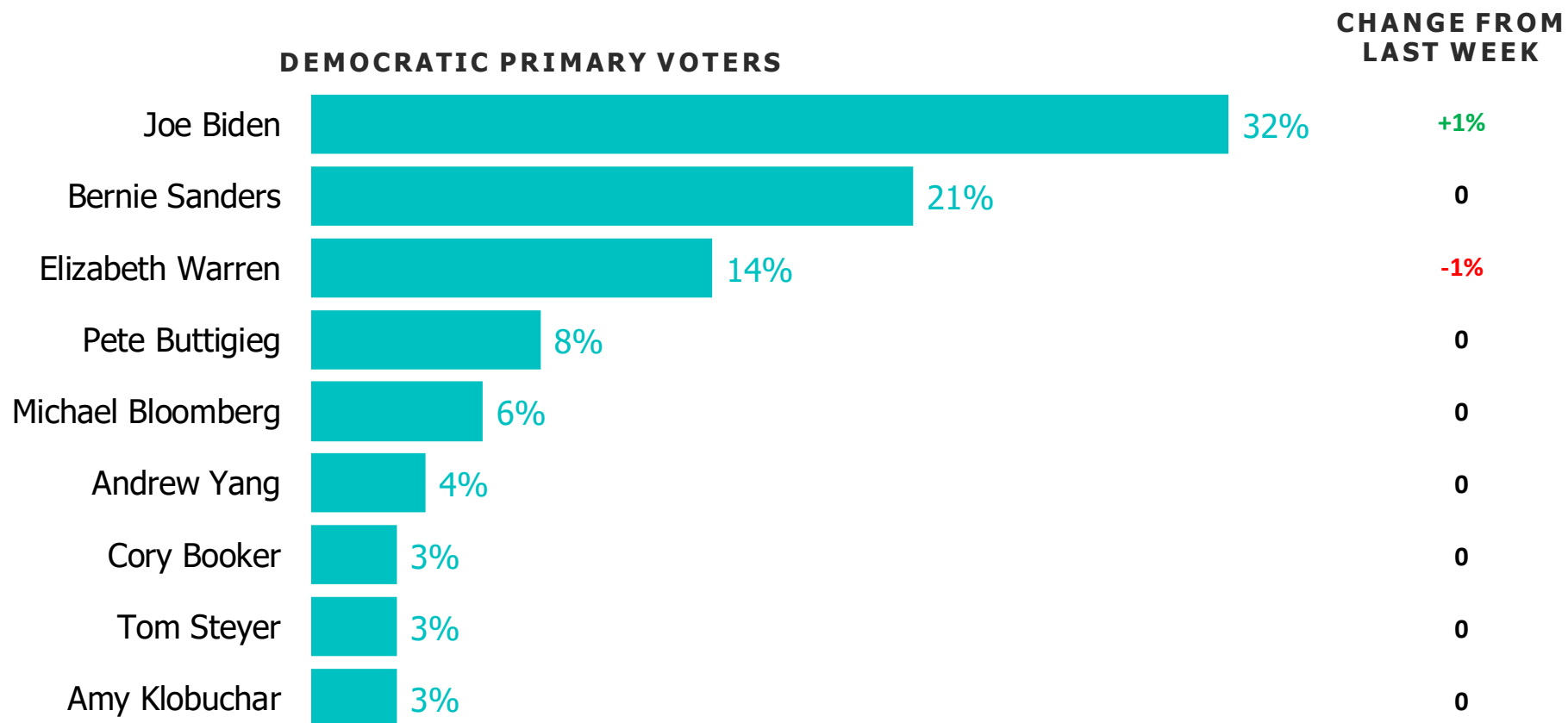


KEY TAKEAWAYS/ 12.30.2019

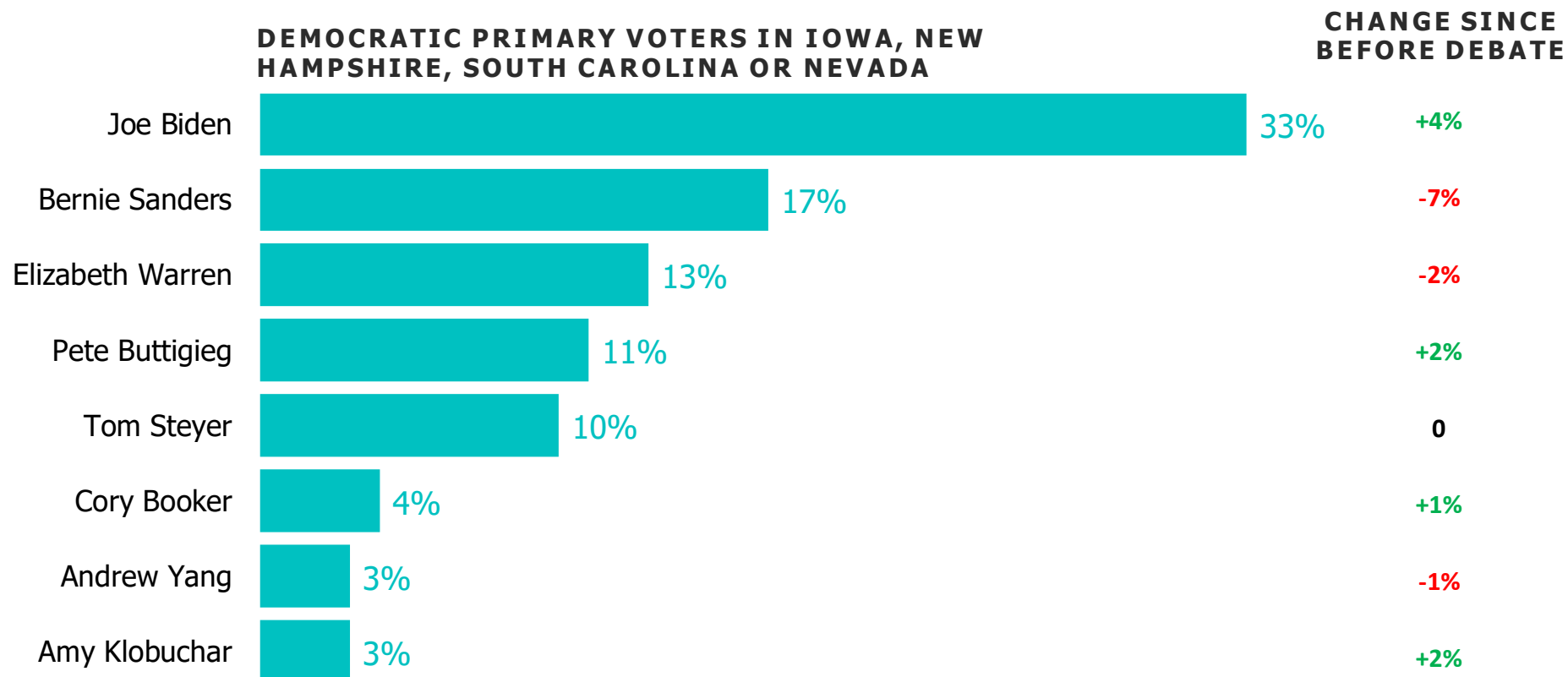
1. **Early-State Voters Sour on Sanders.** Bernie Sanders' support has fallen 7 points among Democratic primary voters in Iowa, Nevada, New Hampshire or South Carolina since our last survey conducted before the Democratic presidential debate on Dec. 19, as front-runner Joe Biden opens up a 16-point gap over the Vermont senator with those early-state voters.
2. **Last Tracking Poll of 2019 Underscores National Stability of the Race.** At a respective 32% and 21% in the latest poll, the standings of Biden and Sanders are essentially unchanged among Democratic primary voters nationwide since early February.
3. **Support for Buttigieg and Warren Climbed in 2019.** Pete Buttigieg has risen from virtual obscurity in February to sit at 8% nationally, and while Elizabeth Warren has seen her support fall in recent months, her 5-point increase since February places her as a top candidate.



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

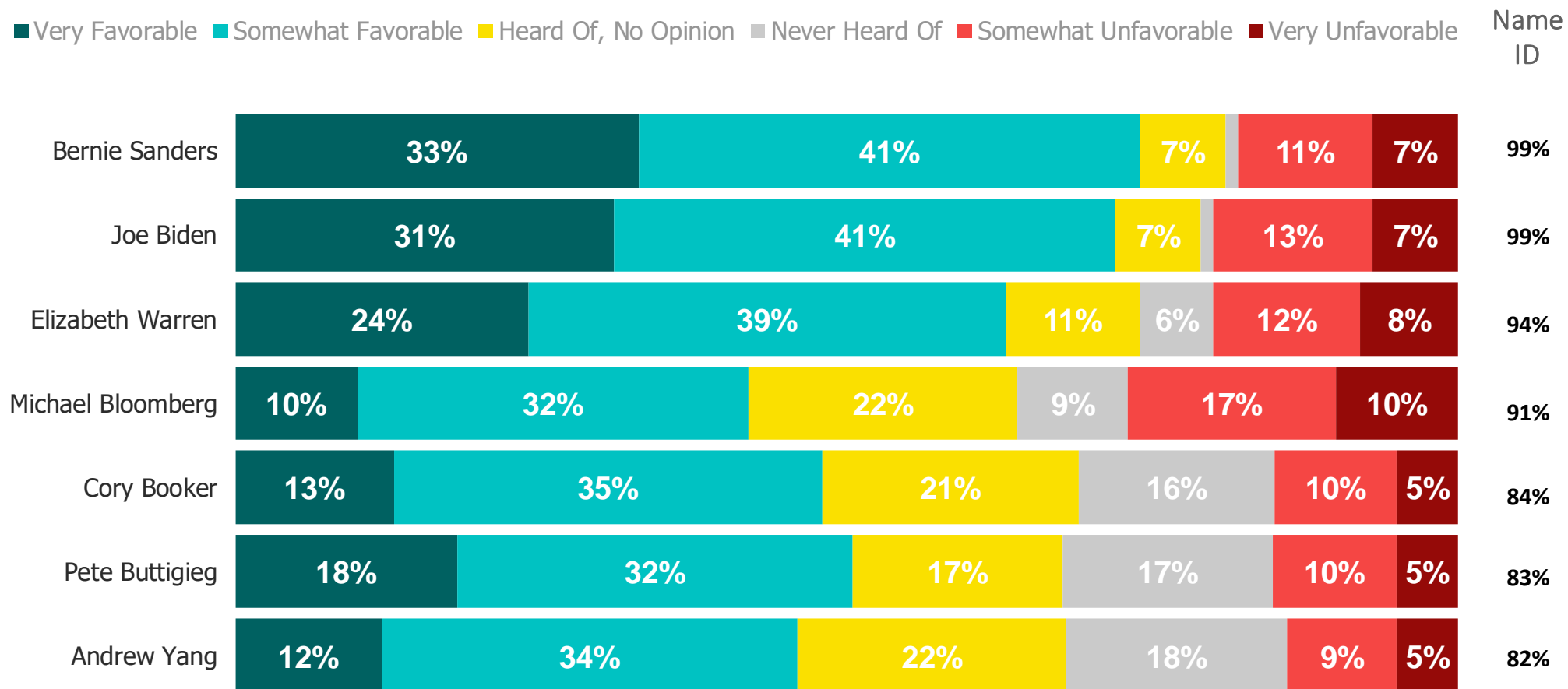


WHO'S LEADING THE DEMOCRATIC PRIMARY / EARLY PRIMARY STATES



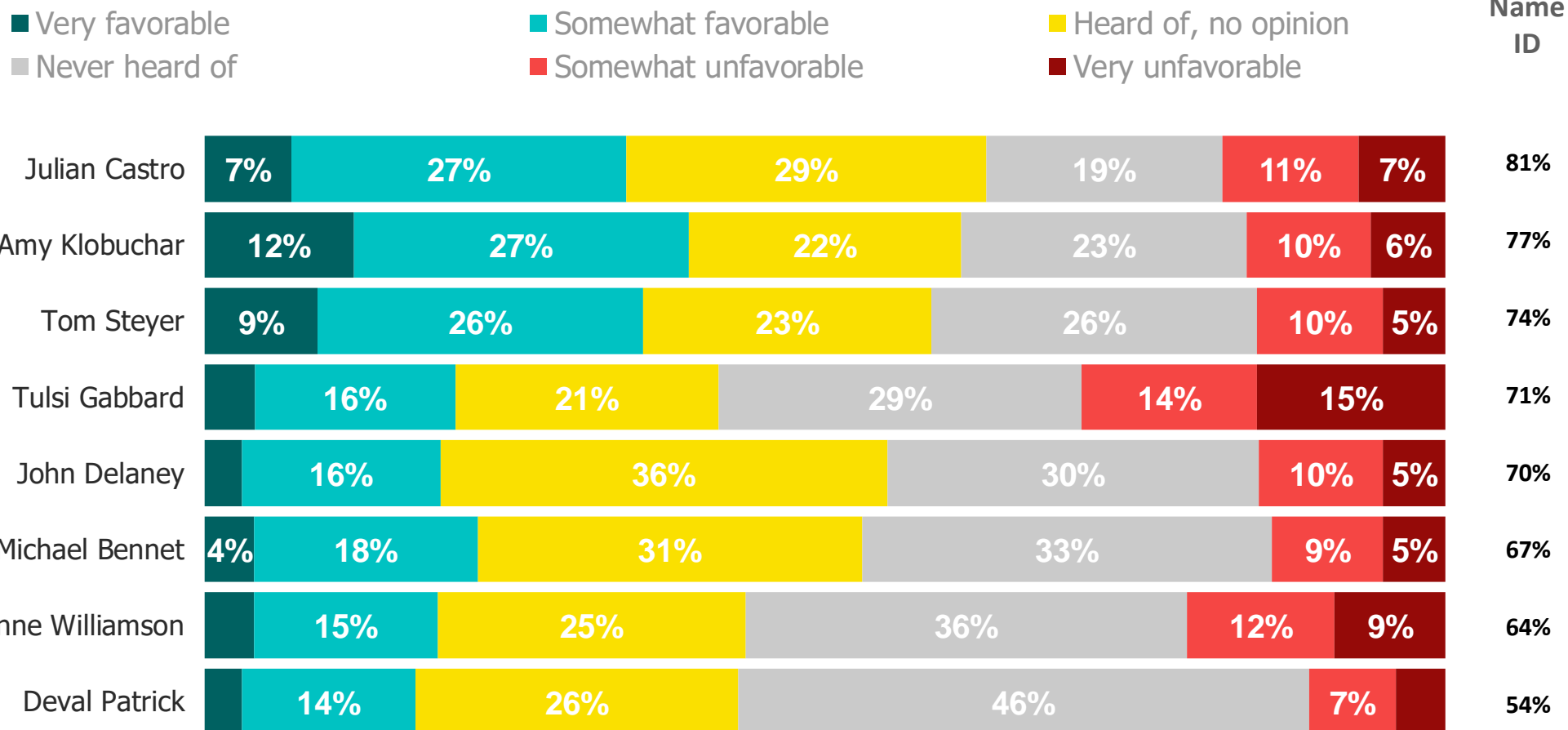
TRACKING FAVORABILITY AND NAME RECOGNITION

Ordered by name ID



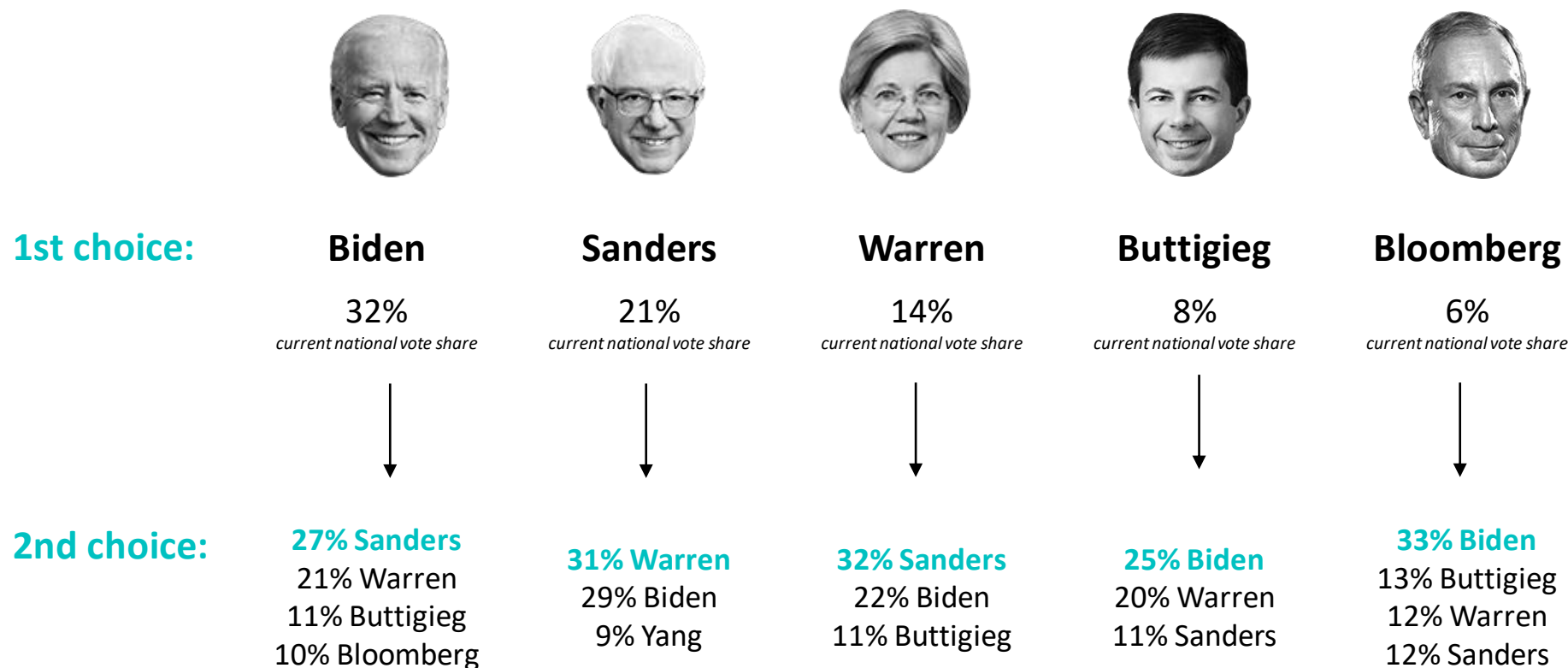
TRACKING FAVORABILITY AND NAME RECOGNITION

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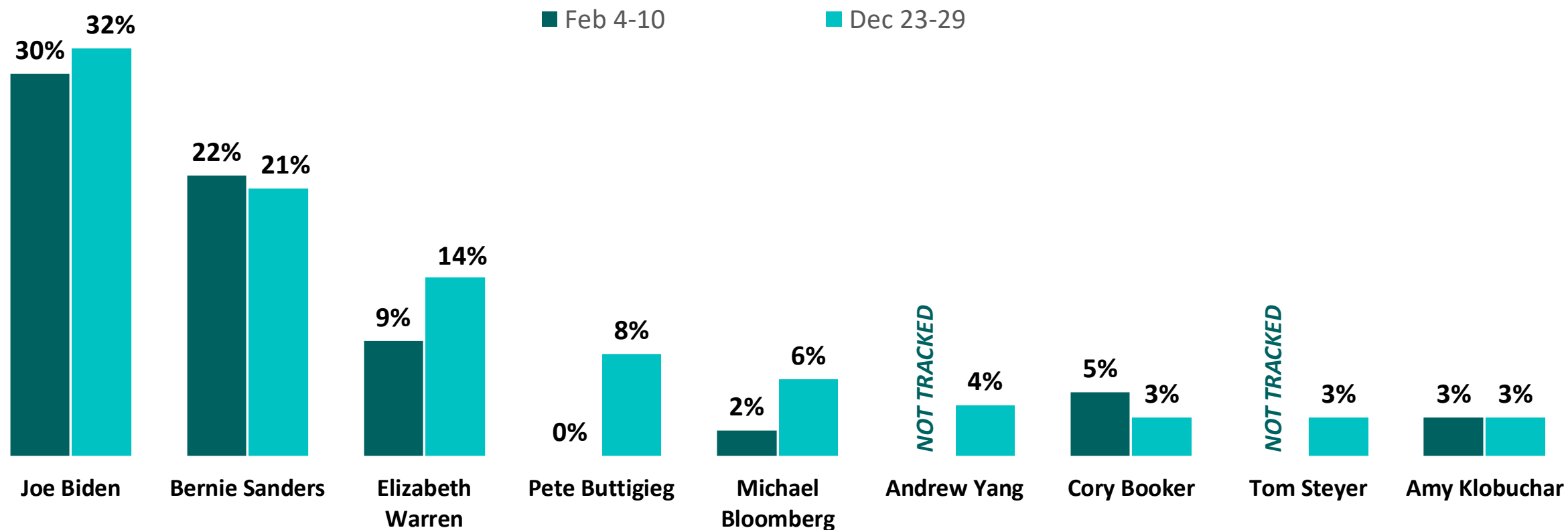


SECOND CHOICE SUPPORT BY CANDIDATE

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.



STATE OF THE RACE: BEGINNING TO END OF 2019



METHODOLOGY /

This week's report features surveys with registered voters conducted from December 23, 2019 through December 29, 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 17,787 interviews with registered voters who indicated 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 toward, 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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