



AGARI CYBER
INTELLIGENCE DIVISION

REPORT

2020 Election Security: **How Confident Are Voters?**

April 2020

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Methodology and Participation Requirements

Agari sought primary market research with registered U.S. voters to understand their awareness, trust, and perceptions of campaign email communications and related hacks/breaches.



Participants took a 5 minute online poll; +/-3.5% margin of error



Data was collected over the course of seven days from October 10-16, 2019



Participants must be 18+ years of age and a registered voter in their state of residence



803 responses were collected and analyzed for this report

Click Balancing Representativeness of the Sample

Sample outflows were click balanced to U.S. registered voter demographics to ensure that those qualifying for and participating in the research represent the target population.

Our goal is for the percentage of survey clicks to be within +/- 3% for each category.

We successfully accomplished this, as can be seen in the tables to the right. Therefore, no weighting of the data is necessary.

| | Voter % | Clicks % | Difference |
|---------------|---------|----------|------------|
| Region | | | |
| Northeast | 17.50% | 16.80% | -0.70% |
| South | 37.60% | 36.70% | -0.90% |
| Midwest | 22.80% | 21.70% | -1.10% |
| West | 22.10% | 24.70% | 2.60% |
| Age by Gender | | | |
| Female 18-24 | 4.50% | 3.10% | -1.40% |
| Female 25-44 | 16.10% | 16.40% | 0.30% |
| Female 45-64 | 18.90% | 19.80% | 0.90% |
| Female 65+ | 13.70% | 14.50% | 0.80% |
| Male 18-24 | 4.10% | 2.20% | -1.90% |
| Male 25-44 | 14.50% | 13.10% | -1.40% |
| Male 45-64 | 17.10% | 18.70% | 1.60% |
| Female 65+ | 11.20% | 12.30% | 1.10% |

| | Voter % | Clicks % | Difference |
|---------------------|---------|----------|------------|
| Hispanic Ethnicity | | | |
| Yes | 10.00% | 10.10% | 0.10% |
| No | 90.00% | 89.90% | -0.10% |
| Race | | | |
| White | 80.00% | 79.60% | -0.40% |
| Black | 12.00% | 11.00% | -1.00% |
| Asian | 4.00% | 3.10% | -0.90% |
| Other | 2.00% | 4.20% | 2.20% |
| 2 or More Races | 2.00% | 2.10% | 0.10% |
| Income | | | |
| Under \$20,000 | 6.00% | 7.50% | 1.50% |
| \$20,000-\$39,999 | 14.00% | 13.00% | -1.00% |
| \$40,000-\$74,999 | 26.00% | 26.20% | 0.20% |
| \$75,000-\$99,999 | 15.00% | 16.00% | 1.00% |
| \$100,000-\$149,999 | 19.00% | 20.40% | 1.40% |
| \$150,000+ | 20.00% | 16.90% | -3.10% |

Key Findings

There is skepticism about the trustworthiness of U.S. presidential campaign emails among a sizable block of registered voters. While this leans more towards Democratic voters, this sentiment is also shared by some Republicans.

The 2016 DNC email hacks have generated less trust among Democratic voters, and have likely contributed to a significant number of them who express concern about foreign interference in the 2020 U.S. presidential election and ways that it can threaten our democracy.

- While few registered Republicans believe that these 2016 hacks changed the outcome of the election, there is still a sizable minority who nonetheless have concerns about foreign interference in the 2020 election. This view may also depend on whether the Republican voter is a centrist or at the far right.

Registered voters are not certain about the degree to which 2020 U.S. presidential campaign emails have been hacked, but there is an expectation that these campaigns have taken the necessary precautions to protect them and the recipients of these communications. A disconnect exists here, as most presidential campaigns have NOT taken necessary precautions.

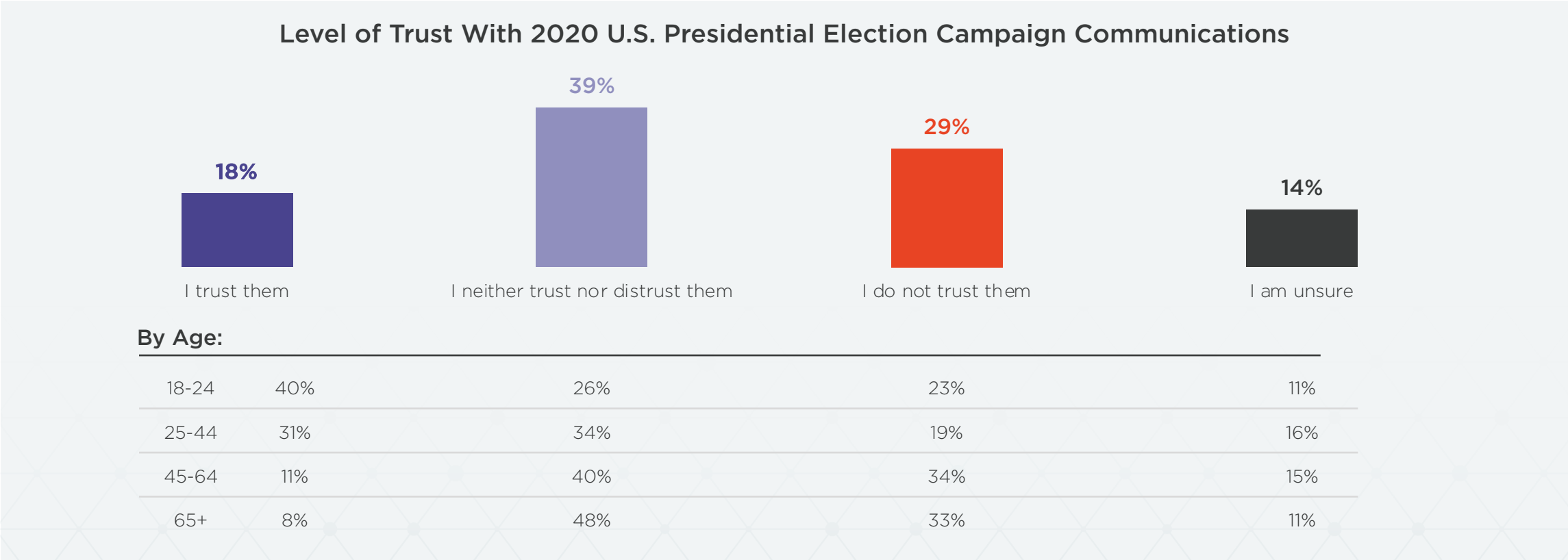
Phishing/fake emails and hacks can have a negative impact on election results, particularly for Democratic candidates.

- Registered Democrats and younger voters would be less likely or at least cautious about voting for a candidate whose campaign emails have been hacked. The reality may differ given that the polarizing nature of current politics could override those concerns in order to secure victory for one's candidate.
- However, donation levels would at least certainly be impacted, which then has an impact on electoral success.

There is limited trust with 2020 U.S. presidential election campaign communications, guided to some degree by generational differences.

Registered voters either don't trust the types of presidential election campaign communications (29%) or are at least not entirely trusting of them. Distrust is more pronounced among those over the age of 44.

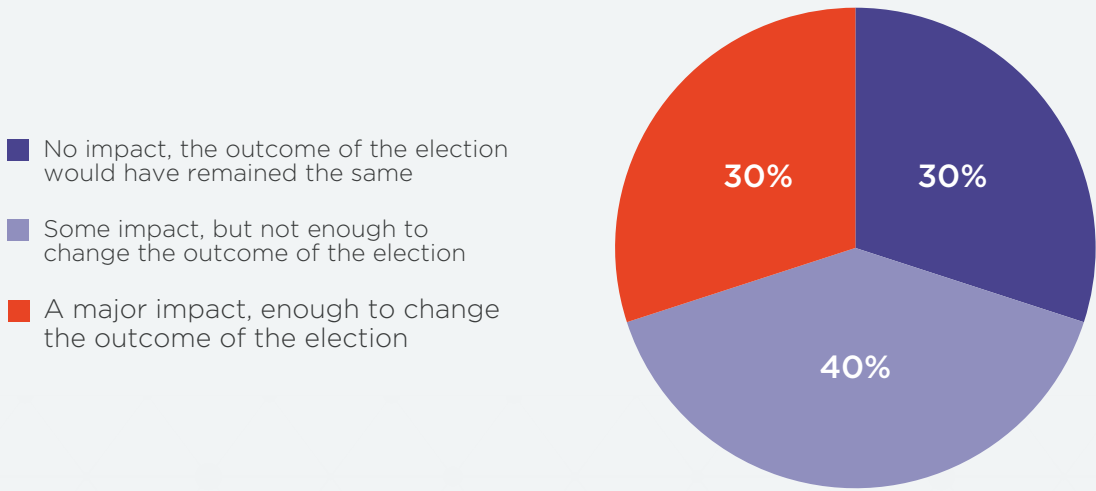
While significantly more Gen Z and Millennials say that they trust these communications, this could change when actually pressed to take action. A sizable number of these voters would question actually voting for a campaign whose emails have been hacked.



The 2016 DNC email hacks have made a negative impression on a sizable portion of voters, largely split by political affiliation.

Democrats are more likely than others to believe the hacks had a major impact that changed the election outcome, while Republicans are more likely to believe they had no impact. This isn't surprising. Democrats feel robbed of their expected outcome; Republicans tend to be satisfied. For the latter, there may also be reticence to question the election results based on sensitivities about credibility of the Electoral College winner.

Impact of 2016 DNC Email Hacks on the Outcome of the 2016 Presidential Election



By Political Affiliation:

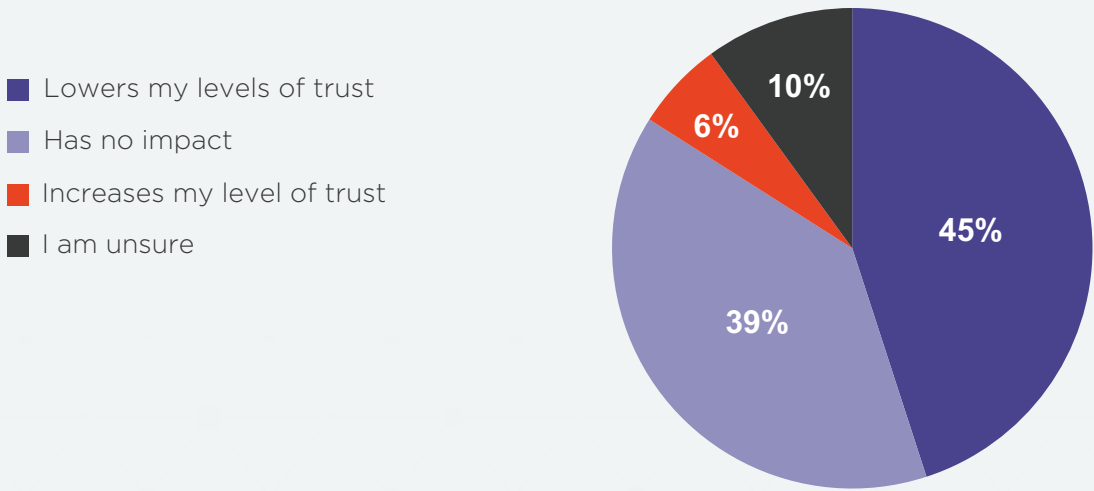
| | Democrat | Republican | All Others |
|----------------|----------|------------|------------|
| No impact | 11% | 50% | 33% |
| Some impact | 41% | 37% | 41% |
| A major impact | 48% | 13% | 26% |

For some, the 2016 DNC hacks seem to have lowered trust with receiving emails from 2020 U.S. presidential election campaigns.

Just under half (45%) say that October 2019 hacks on Trump campaign staff accounts have lowered their level of trust in receiving emails from U.S. presidential campaigns. This isn't partisan; a sizable portion of registered U.S. voters across party affiliation express this sentiment.

Where the 2016 DNC hacks may be influencing this is that such sentiment is heightened among Democrats; nearly as many who said that those hacks changed the 2016 election results (48%) say that the Trump staff email hacks lowers their level of trust with these types of communications (49%).

Impact of Trump 2020 Email Hacks on Trust of Emails From 2020 U.S. Presidential Election Campaigns



By Political Affiliation:

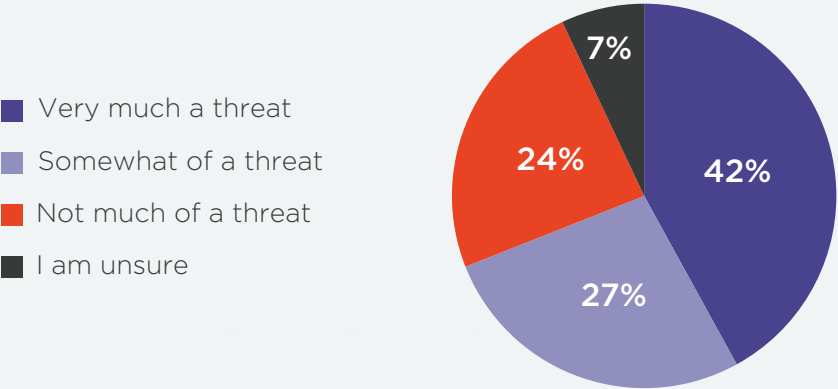
| | Democrat | Republican | All Others |
|-----------------------------|----------|------------|------------|
| Lowers my level of trust | 49% | 38% | 45% |
| Has no impact | 35% | 44% | 39% |
| Increases my level of trust | 8% | 6% | 4% |
| I am unsure | 8% | 12% | 12% |

There is concern among many about foreign interference in 2020 U.S. presidential election campaigns.

While significantly more registered Democrats are concerned about foreign interference and likely to see it as a threat to U.S. democracy, there is a sizable minority of Republicans who share these concerns as well.

The split between registered Republican voters on this matter may be based on whether one’s political beliefs fall more toward the center or the far right.

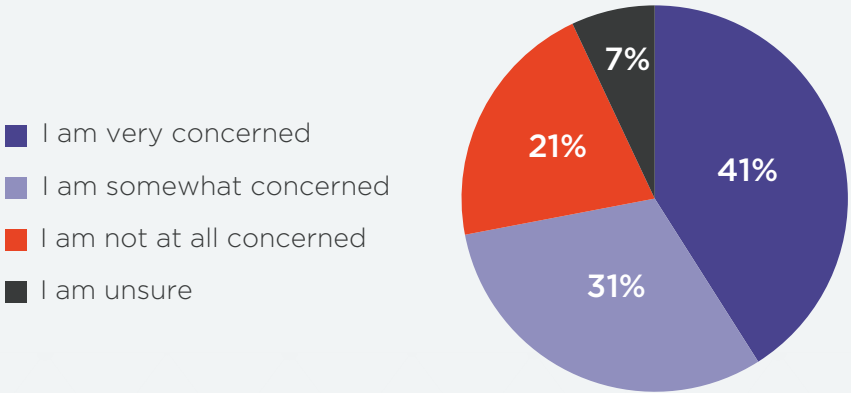
Degree That Foreign Interference in 2020 U.S. Presidential Election Campaigns is a Threat to U.S. Democracy



By Political Affiliation:

| | Democrat | Republican | All Others |
|----------------------|----------|------------|------------|
| Very much a threat | 66% | 16% | 36% |
| Somewhat of a threat | 25% | 28% | 28% |
| Not much of a threat | 7% | 47% | 23% |
| I am unsure | 2% | 9% | 14% |

Level of Concern that a Foreign State Will Attempt to Interfere in the 2020 U.S. Presidential Election



By Political Affiliation:

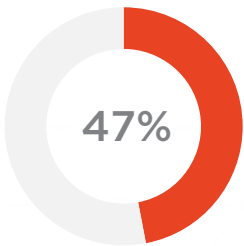
| | Democrat | Republican | All Others |
|---------------------------|----------|------------|------------|
| I am very concerned | 65% | 16% | 33% |
| I am somewhat concerned | 25% | 39% | 32% |
| I am not at all concerned | 6% | 39% | 23% |
| I am unsure | 4% | 7% | 12% |

While a number of registered voters may suspect that U.S. presidential campaigns have had some level of email hacking, there is likely less clarity or understanding about the actual scope to which this may have occurred.

Of those registered voters (44%) who gave an estimate, the average is 47% who believe that the campaigns have already been hacked. This is the same amount that was given for the percent they think are unaware about being hacked. So many voters think campaigns have already been hacked, but just don't know it yet. Hackers can compromise an email and lie in wait, watching communications flow across email inboxes.



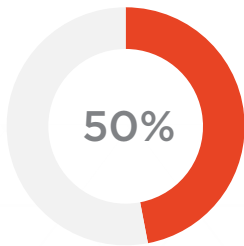
Estimate of the Percentage of 2020 U.S. Presidential Campaigns That Have Been Hacked*



*44% Were Able to Provide an Estimate



Estimate of the Percentage of 2020 Presidential Campaigns Who Are Not Aware They Have Been Hacked



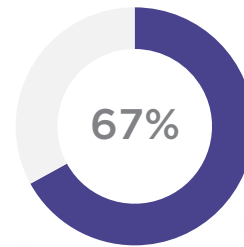
**79% Were Able to Provide an Estimate



Many are also uncertain about whether U.S. presidential campaigns are taking steps to protect themselves from email hacks. Among voters who gave an estimate, there is the assumption that a majority (67%) are taking the necessary precautions.



Estimate of the Percentage of 2020 U.S. Presidential Election Campaigns That Are Taking Steps to Protect Themselves from Email Hacks*

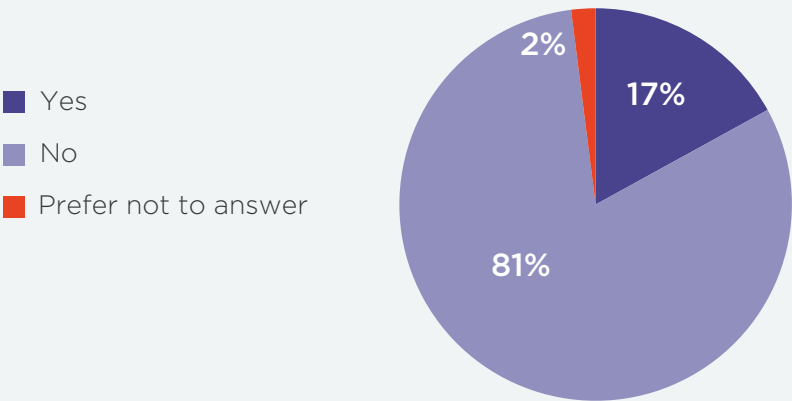


*54% Were Able to Provide an Estimate

Few of those surveyed have donated to a U.S. presidential campaign in the past based on receiving email requests.

This is particularly true for females over the age of 44 and with lower household incomes.

Donated to a U.S. Presidential Campaign Based on Receiving Requests Through Email



By Age:

| | 18-24 | 25-44 | 45-64 | 65+ |
|----------------------|-------|-------|-------|-----|
| Yes | 34% | 24% | 10% | 14% |
| No | 54% | 75% | 88% | 83% |
| Prefer not to answer | 12% | 1% | 2% | 2% |

By Gender:

| | Male | Female |
|----------------------|------|--------|
| Yes | 21% | 13% |
| No | 77% | 85% |
| Prefer not to answer | 2% | 3% |

By Household Income:

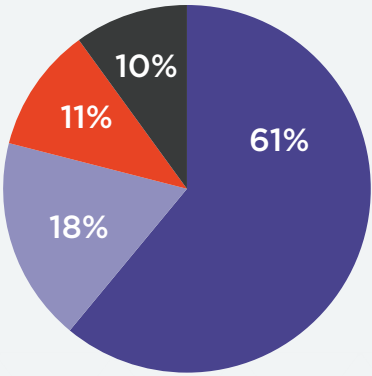
| | <\$40K | \$40K-\$74.9K | \$75K-\$149.9K | \$150K+ |
|----------------------|--------|---------------|----------------|---------|
| Yes | 12% | 13% | 20% | 21% |
| No | 84% | 86% | 78% | 79% |
| Prefer not to answer | 4% | 1% | 3% | 1% |

Receiving a fake/phishing email would prevent a majority from donating to the specific campaign from which the email appeared to come, as well as to other 2020 U.S. presidential election campaigns.

This is particularly true for those over the age of 44, who tend to have higher incomes and abilities to make donations.

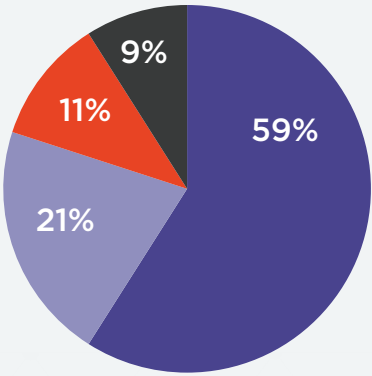
Impact of Fake/Phishing Email on Willingness to Donate to:

Specific Campaign From Which the Email Appeared to Come



- I would not donate to requests by email
- I might still donate, but only after doing research
- It would not deter me from donating
- I am not sure

Other 2020 U.S. Presidential Election Campaigns



By Age:

| | 18-24 | 25-44 | 45-64 | 65+ |
|-----------------------|-------|-------|-------|-----|
| I would not donate | 34% | 50% | 63% | 76% |
| I might still donate | 39% | 23% | 15% | 11% |
| It would not deter me | 7% | 15% | 11% | 8% |
| I am not sure | 20% | 12% | 11% | 6% |

By Age:

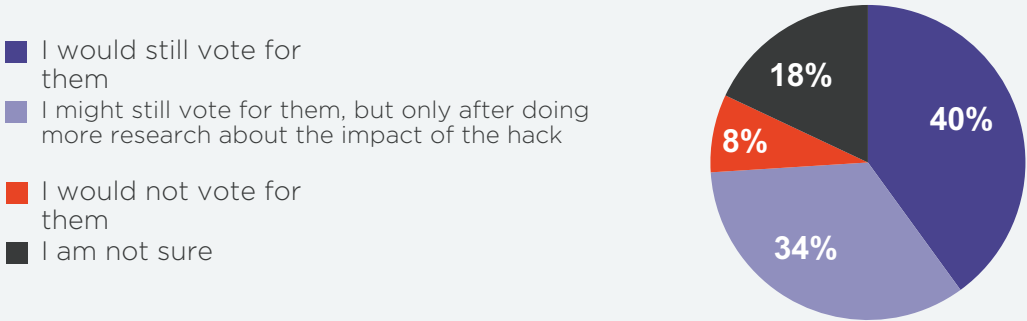
| | 18-24 | 25-44 | 45-64 | 65+ |
|-----------------------|-------|-------|-------|-----|
| I would not donate | 41% | 50% | 58% | 71% |
| I might still donate | 39% | 26% | 19% | 16% |
| It would not deter me | 5% | 14% | 13% | 7% |
| I am not sure | 15% | 10% | 9% | 6% |

Further, an email hack on a 2020 U.S. presidential candidate could result in the loss of votes that might be critical to success, particularly for Democratic candidates.

Overall, 60% of registered voters said that an email hack would make them not vote for a candidate or question doing so. This is particularly cited by younger Democratic and non-affiliated voters who have been an important voting bloc to Democratic candidates.

The voting behavior of Republican males over the age of 44 is less likely than others to be influenced by an email hack.

Impact of Email Hack on Decision to Vote for That 2020 U.S. Presidential Candidate



By Age:

| | 18-24 | 25-44 | 45-64 | 65+ |
|--|-------|-------|-------|-----|
| I would still vote for them | 27% | 34% | 44% | 43% |
| I might still vote for them, after doing more research | 46% | 41% | 30% | 29% |
| I would not vote for them | 17% | 9% | 7% | 7% |
| I am not sure | 10% | 16% | 19% | 21% |

By Gender:

| | Male | Female |
|--|------|--------|
| I would still vote for them | 45% | 36% |
| I might still vote for them, after doing more research | 33% | 34% |
| I would not vote for them | 6% | 9% |
| I am not sure | 15% | 21% |

By Household Income:

| | Democrat | Republican | All Others |
|--|----------|------------|------------|
| I would still vote for them | 38% | 52% | 29% |
| I might still vote for them, after doing more research | 35% | 31% | 34% |
| I would not vote for them | 10% | 3% | 10% |
| I am not sure | 16% | 14% | 26% |

Only 1 out of 2 candidates polling above 1% has implemented the necessary precautions to prevent attacks on campaign staff, donors, and voters.



Joe Biden

Email Authentication
Protects Voters and Donors
Against Fraud



Advanced Email Security
Protects Campaigns from
Breaches



Donald Trump

Email Authentication
Protects Voters and Donors
Against Fraud



Advanced Email Security
Protects Campaigns from
Breaches



Learn More: www.agari.com/election2020

About Fortra's Agari Cyber Intelligence Division

Agari Cyber Intelligence Division (ACID) is the world's only counterintelligence research group dedicated to business email compromise (BEC) investigation and cybercrime abatement. ACID has conducted more than 12,000 active defense engagements with threat actors since May 2019. ACID works closely with CISOs at global enterprises, law enforcement, and other trusted partners to stop identity-based phishing and socially-engineered cybercrimes.

Learn more at acid.agari.com

