

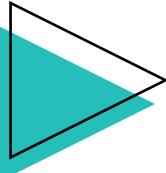
NEW FINDINGS ON VOTE BY MAIL

SEPTEMBER 2020

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CITIZEN DATA



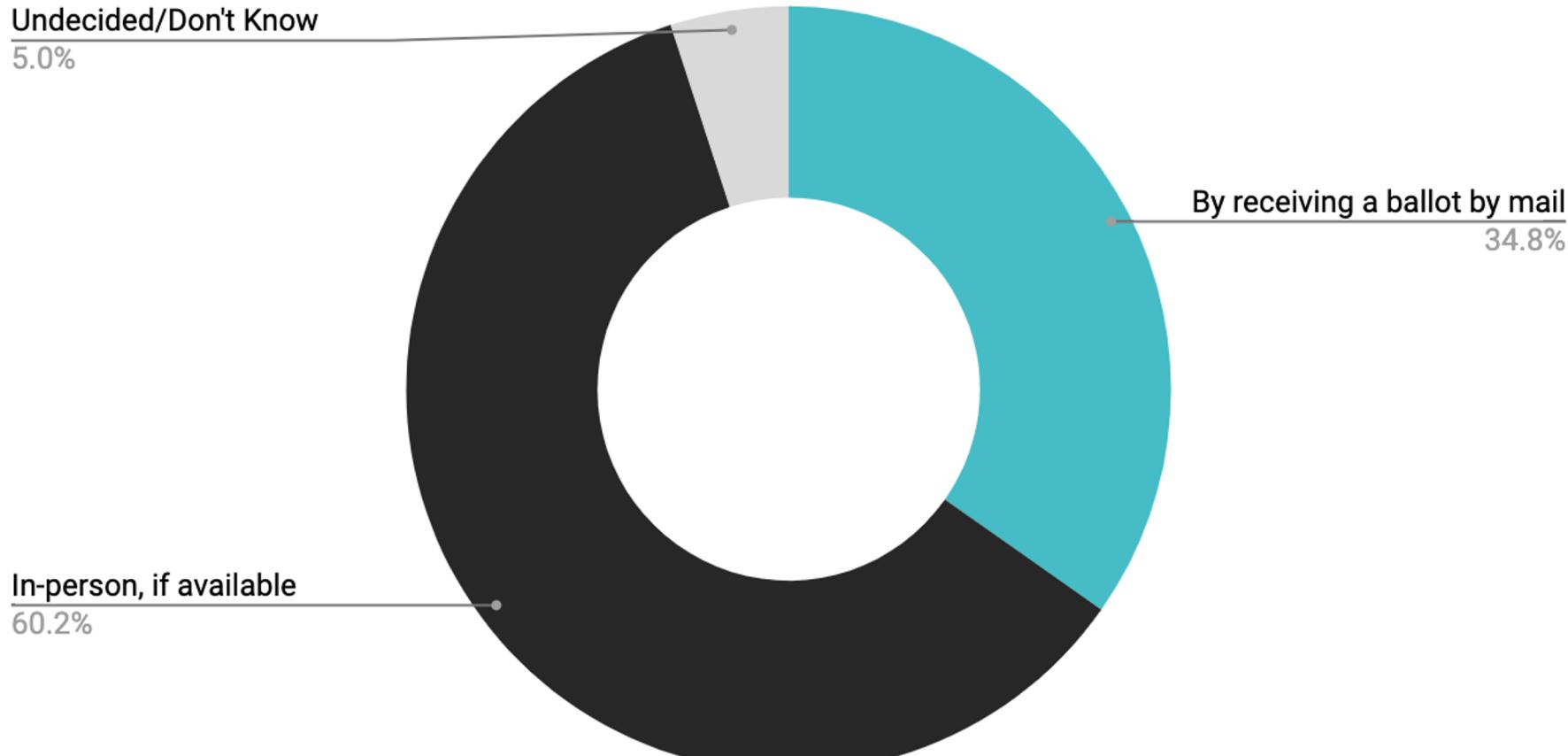
Survey overview:

- ▶ Citizen Data surveyed 30,000 likely voters nationally between September 3-8 via IVR/P2P on their vote method intentions and to assess contributing factors to their likelihood to vote by mail for the 2020 general election.
- ▶ This survey data has been matched to Citizen's voter file of all registered voters, weighted, and will be used for more precise modeled projections in key states.

More voters will vote by mail nationally in 2020;

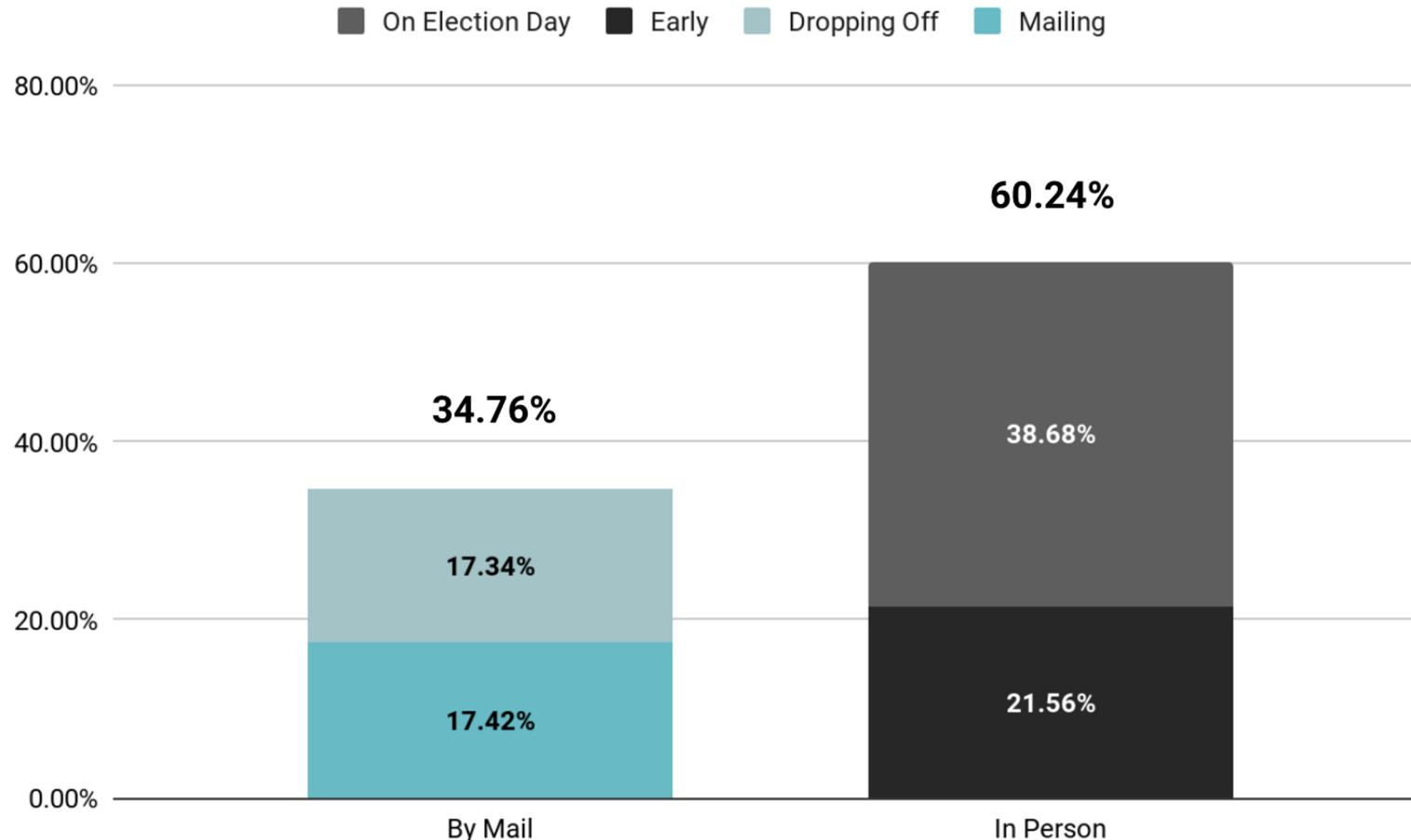
35% plan to vote by mail and 60% in person, if available.

How do you plan to vote in the November general election?

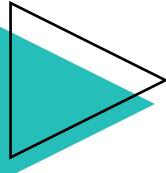


Voters split on ballot return and in-person timing.

Dropboxes and early vote critical features of voting behavior.

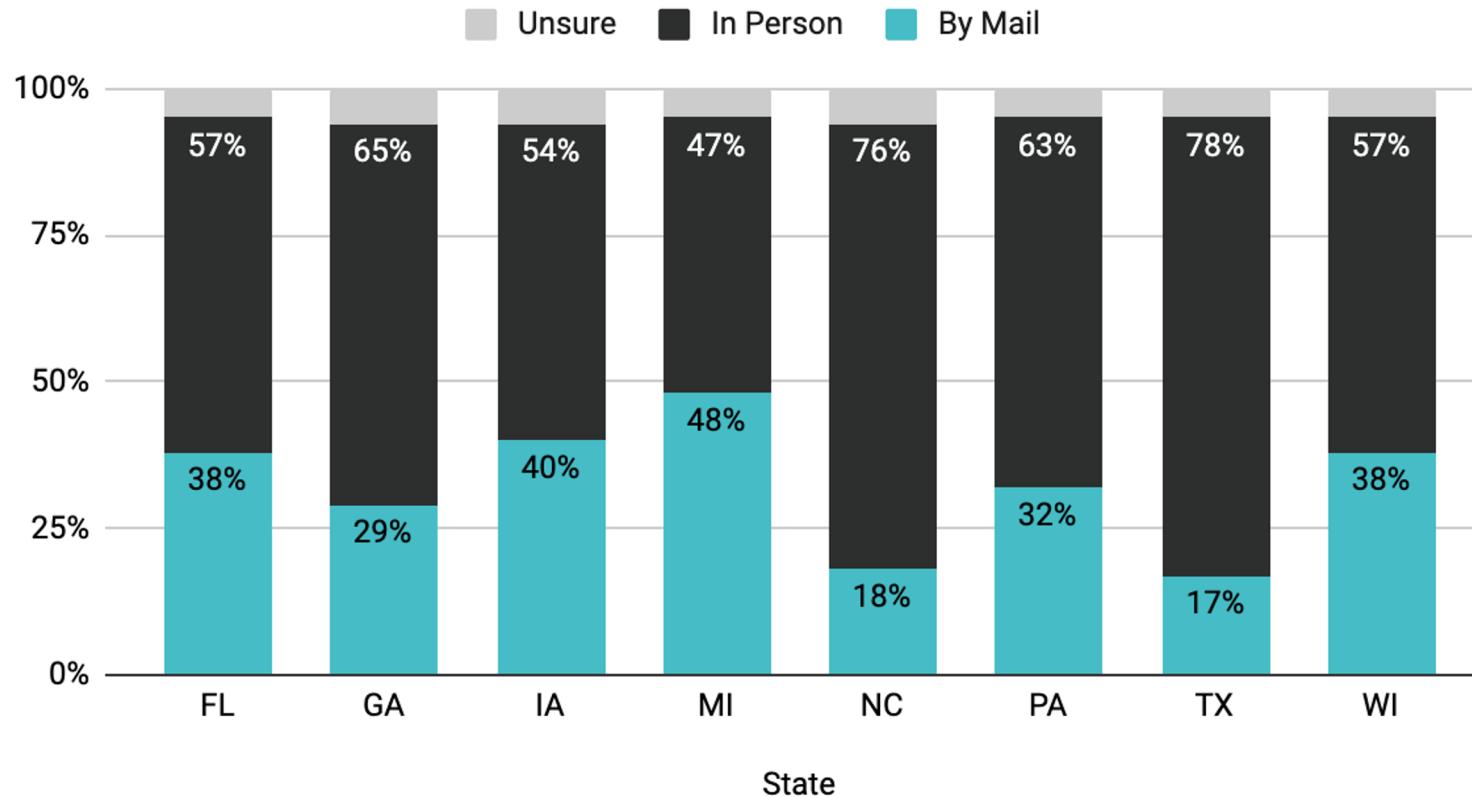


Of those who plan to vote by mail, equal numbers plan to return their ballot via the U.S. postal service as plan to drop it off at a secure location, if available. Of those who plan to vote in person, roughly $\frac{1}{3}$ plan to vote early in person while $\frac{2}{3}$ plan to vote in person on Election Day.



Battlegrounds will see significant increases,
with few exceptions. NC & TX voters indicate less likelihood given early vote.

Intended Vote Method by State

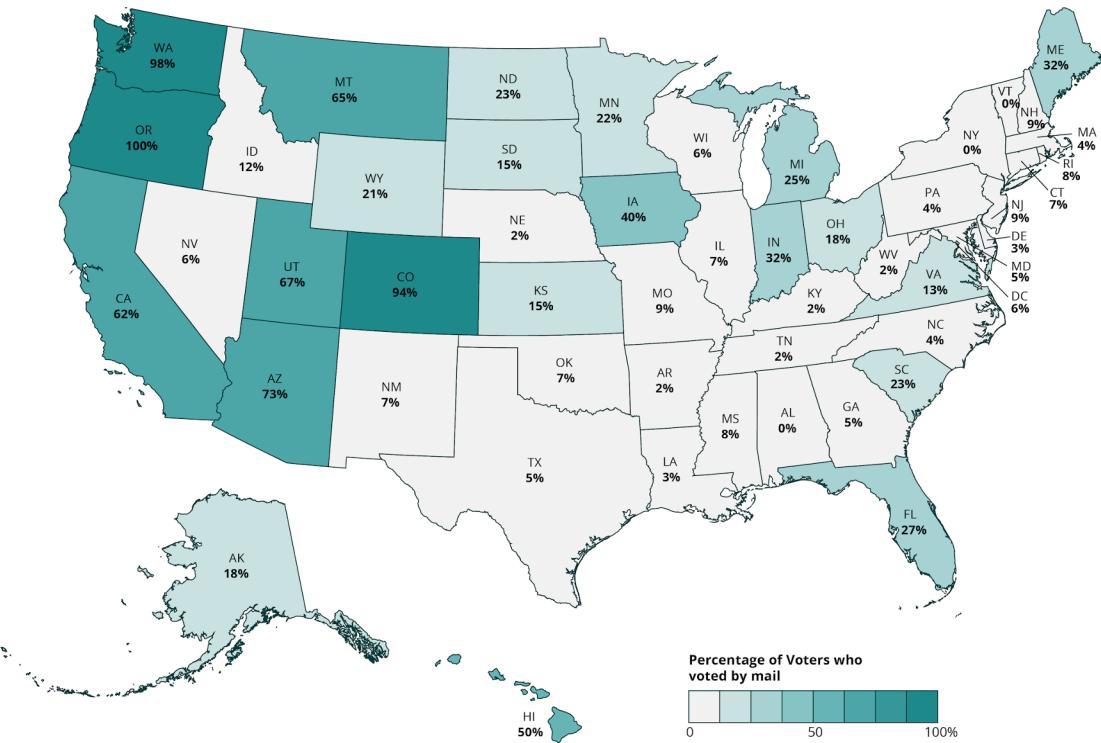


Likely voters surveyed in key states indicate a high propensity to vote by mail. Notably, almost 50% of likely voters in Michigan intend to vote by mail.

Compared to 2016, more voters will vote by mail, with the increases least pronounced in the south and Indiana...

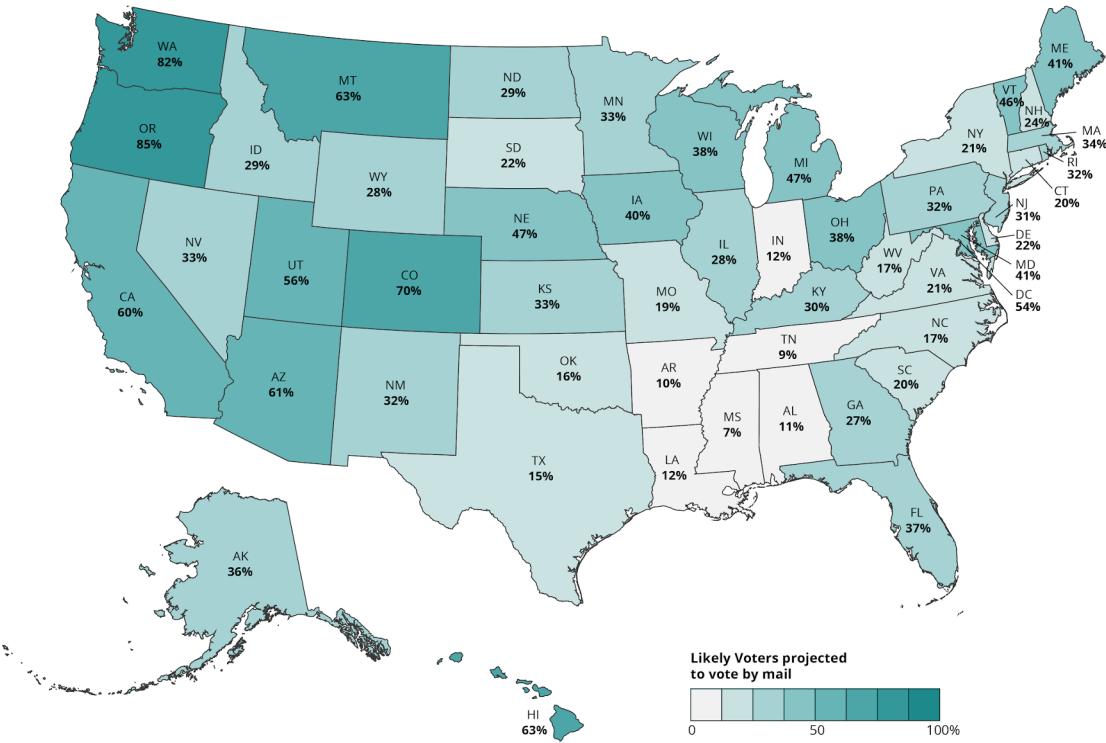
2016 Vote by Mail Turnout

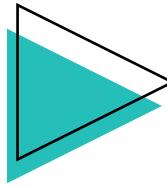
As a percentage of voters in each state and the District of Columbia



2020 Vote by Mail Projections

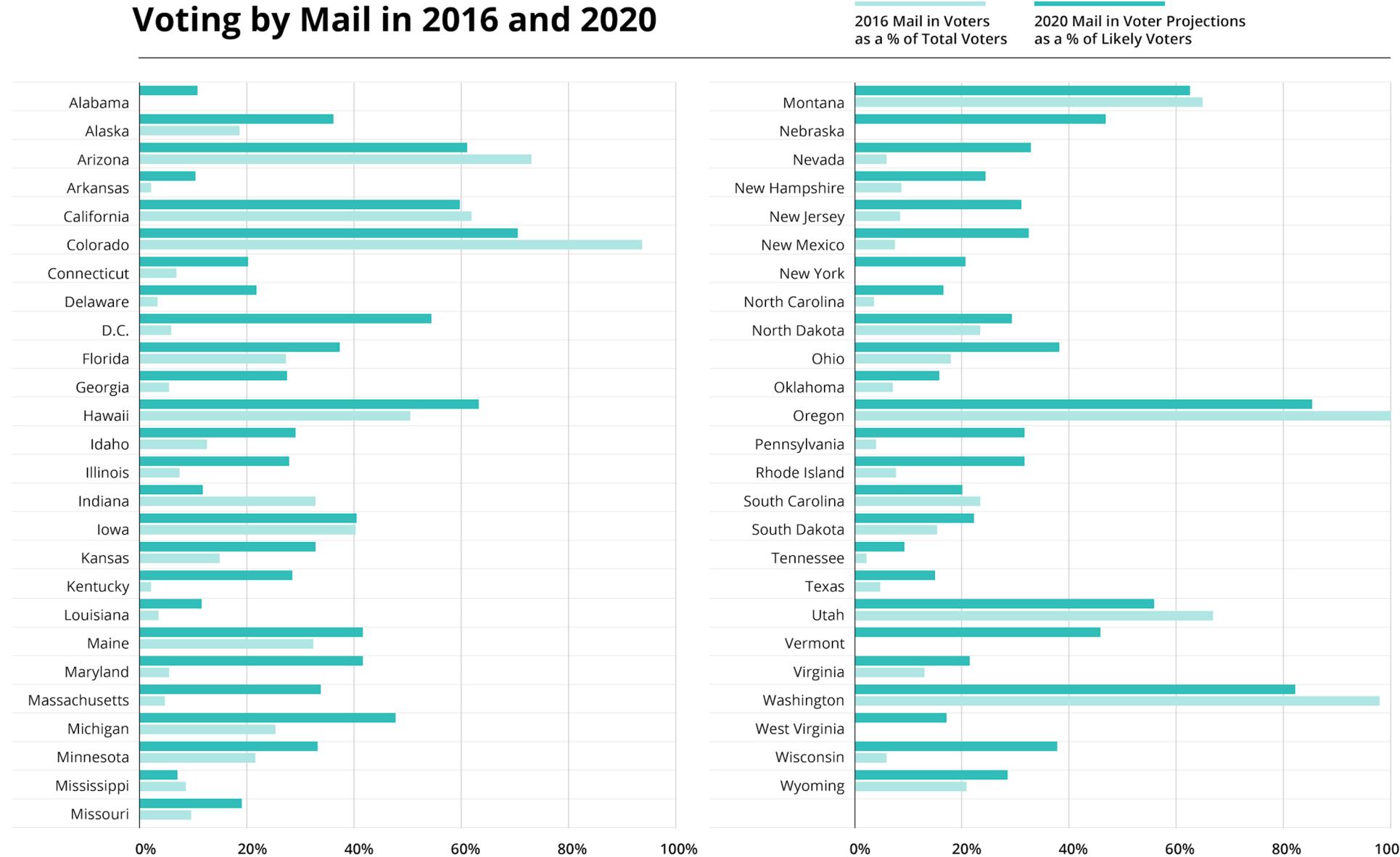
As a percentage of likely voters in each state and the District of Columbia





...with many states showing significant mail increases.

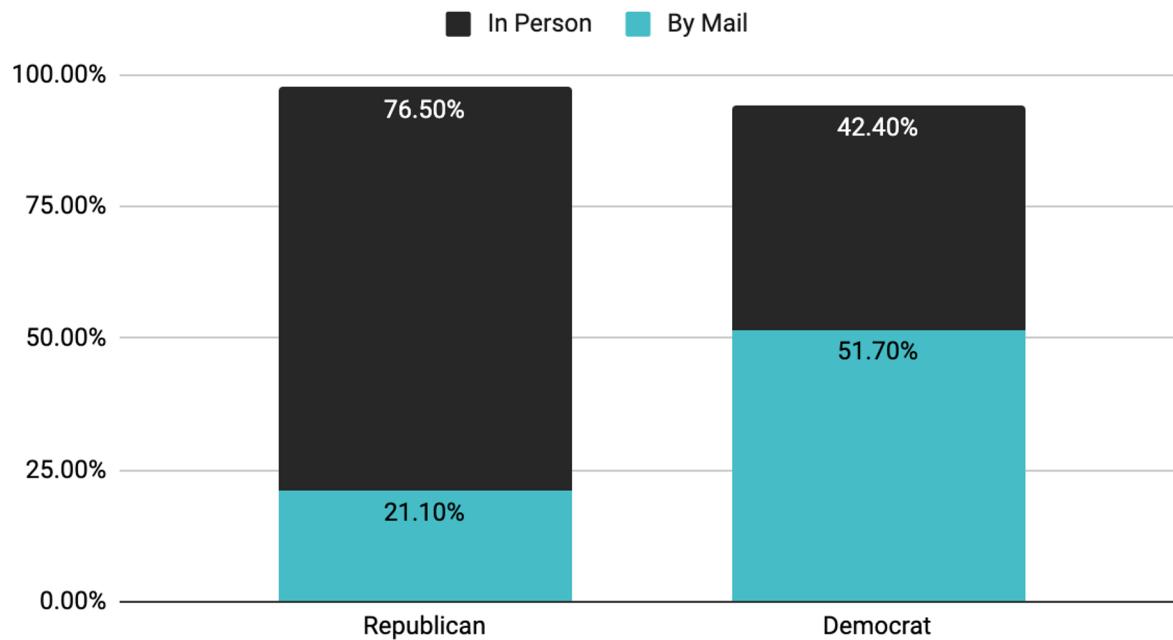
Voting by Mail in 2016 and 2020



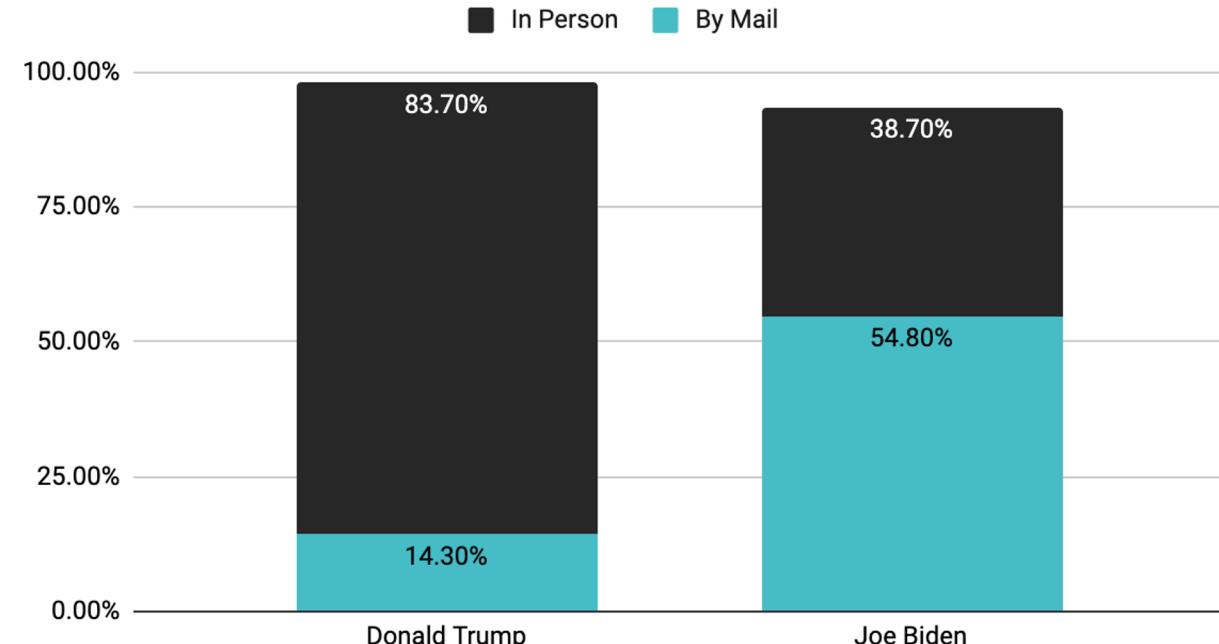
Partisanship significantly impacts mail vote intent.

Republicans are much more likely to say they'll vote in person, if available.

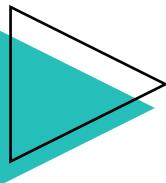
Intended Vote Method by Party



Intended Vote Method by Presidential Preference

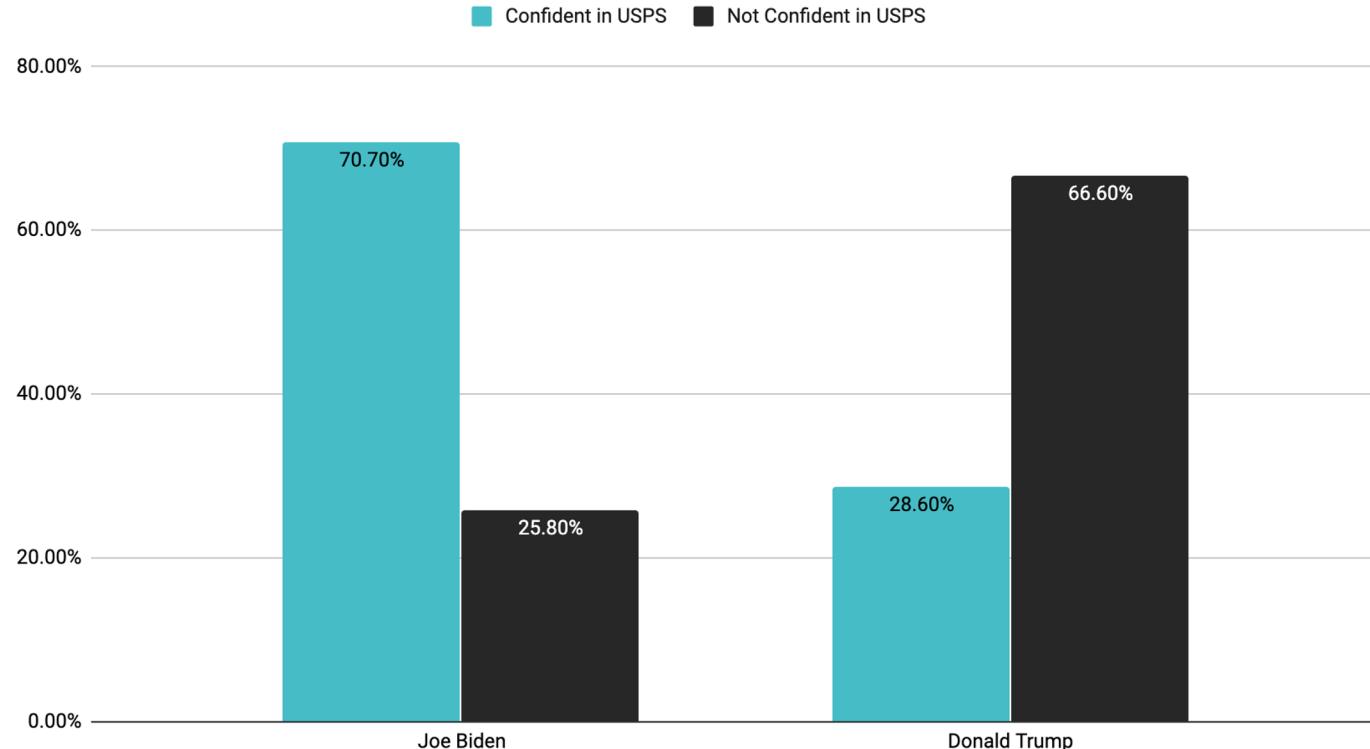


Similarly, Biden voters are more than twice as likely to vote by mail as Trump supporters. There are slight nuances in partisan intent to vote by mail versus presidential preference likelihood to vote by mail.



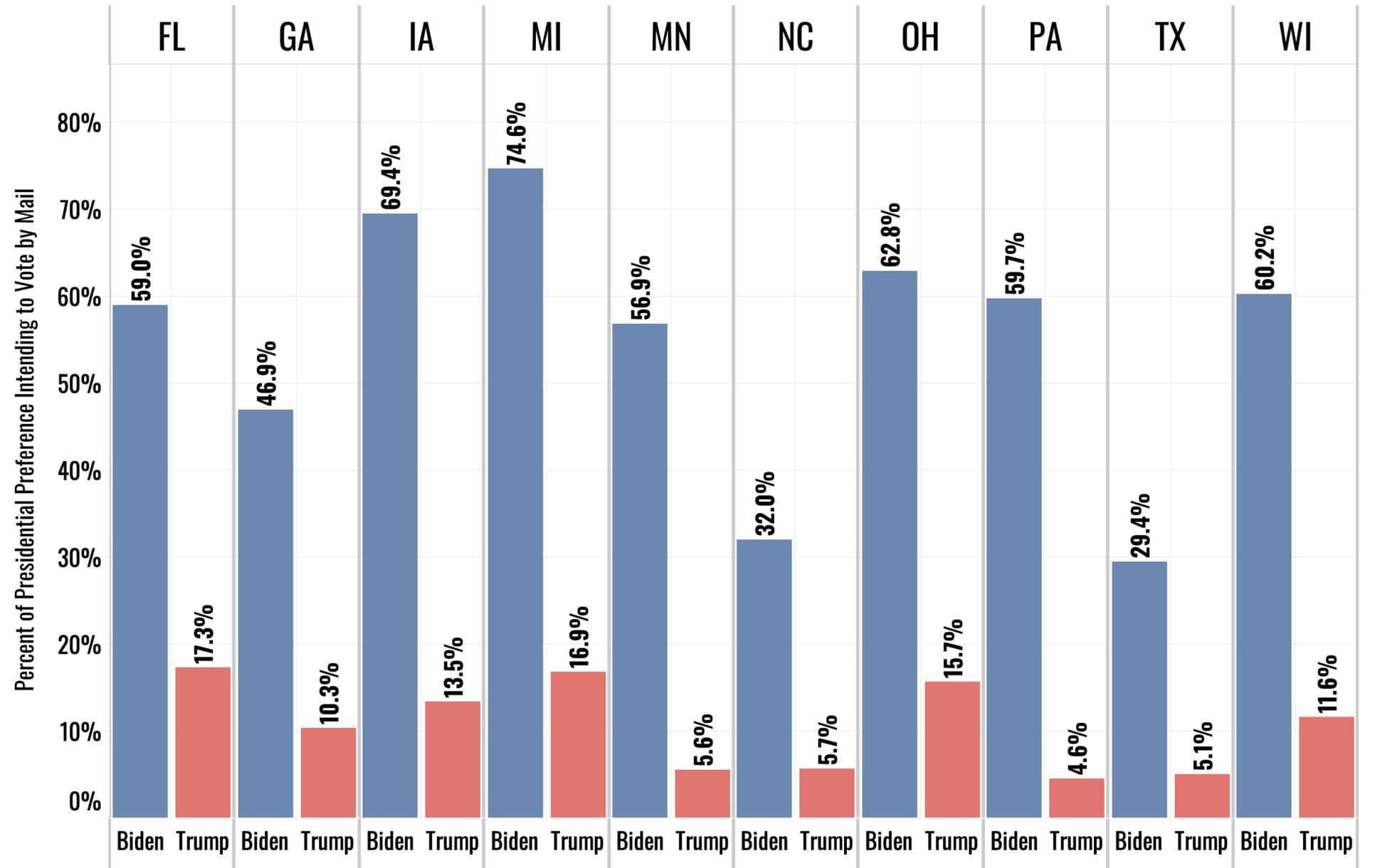
Majority of likely voters have confidence in the USPS, though confidence in its ability to deliver ballots is split on partisan lines.

USPS Confidence by Presidential Preference

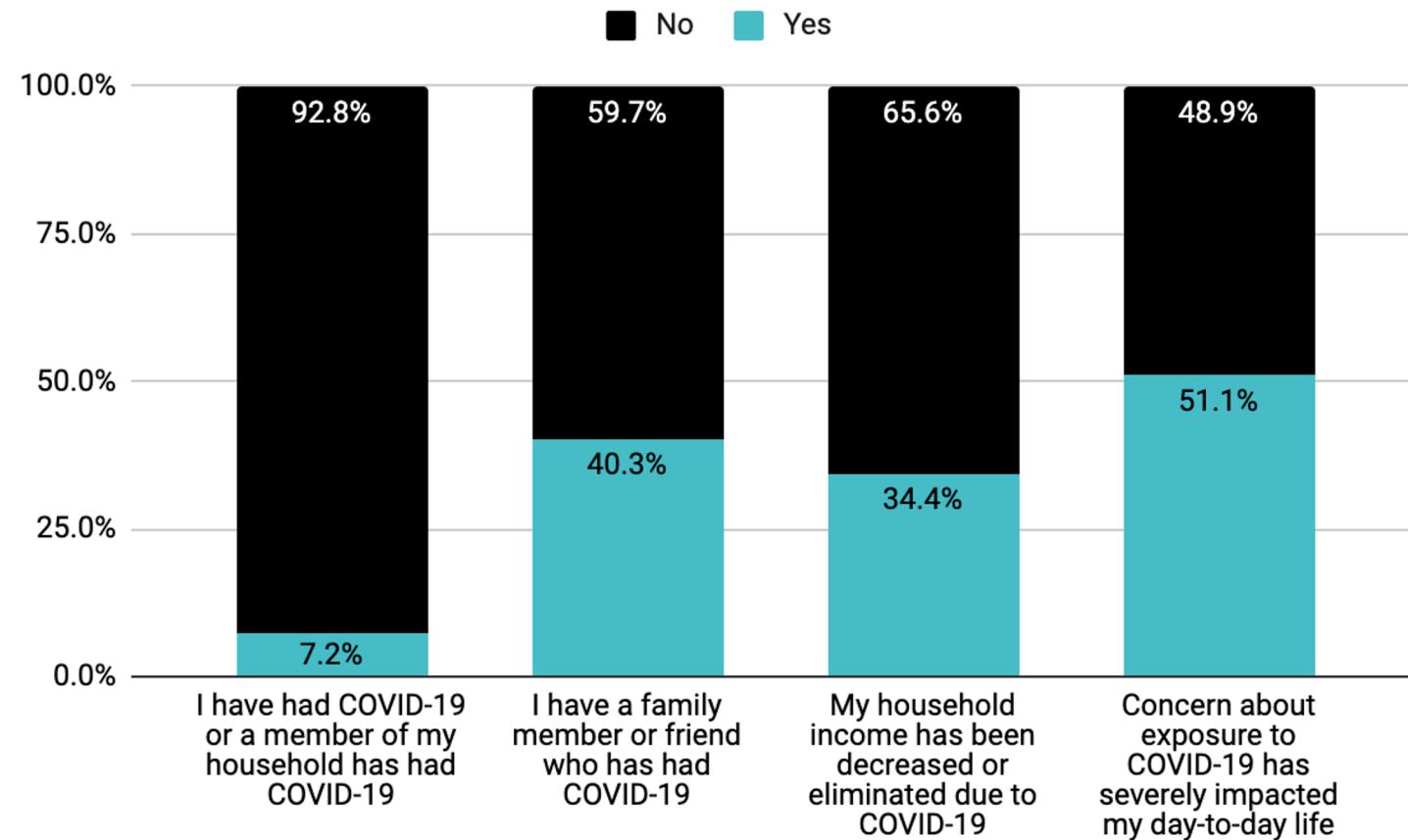


52% total likely voters are confident in the USPS's ability to deliver ballots to voters and to election officials in time, including 89% of voters planning to return their ballot by mail and 68% of voters who plan to drop off.

Biden supporters are much more likely to vote by mail.

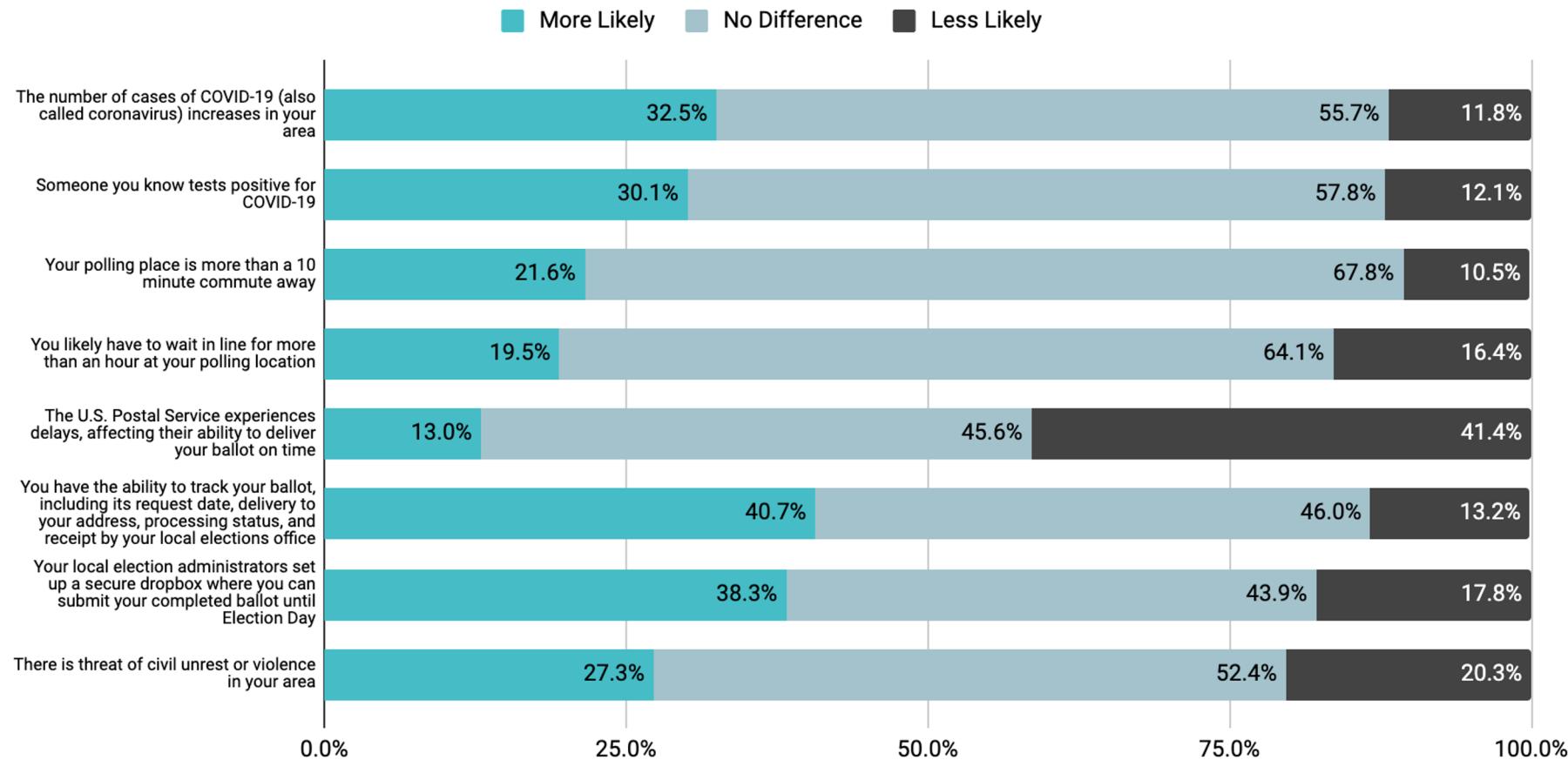


Concern about exposure to COVID-19 has a higher impact on likelihood to vote by mail than personal experience.



42.4% of those planning to vote by mail have had a family member or friend who has had COVID, as compared to 38.6% of those planning to vote in-person. 69.3% of those planning to vote by mail agree that concern about exposure to COVID-19 has severely impacted their day-to-day life, as compared to 39.3% of those planning to vote in-person.

Current events and election administration policies have varying effects on vote by mail likelihood.



24.2% of those planning to vote in-person are more likely to vote by mail if they had the ability to track their ballot, suggesting that concern around ballot receipt and delivery affects likelihood to vote by mail. Similarly, 22.6% of those planning to vote in-person would be more likely to vote by mail if they had access to a secure dropbox to submit their completed ballot, suggesting that concerns around ballot receipt and delivery sways voters to vote in-person.



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