



# The Shifting Voter Mindset

Why direct mail is the new way to reach new voters



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# Navigating a new era in political campaigning





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**The phenomenon—improved technology increases access to news, but also makes it easier to avoid it—is fairly well established by now.**

—Joshua Benton, Director and Founder of the Nieman Journalism Lab, Harvard University





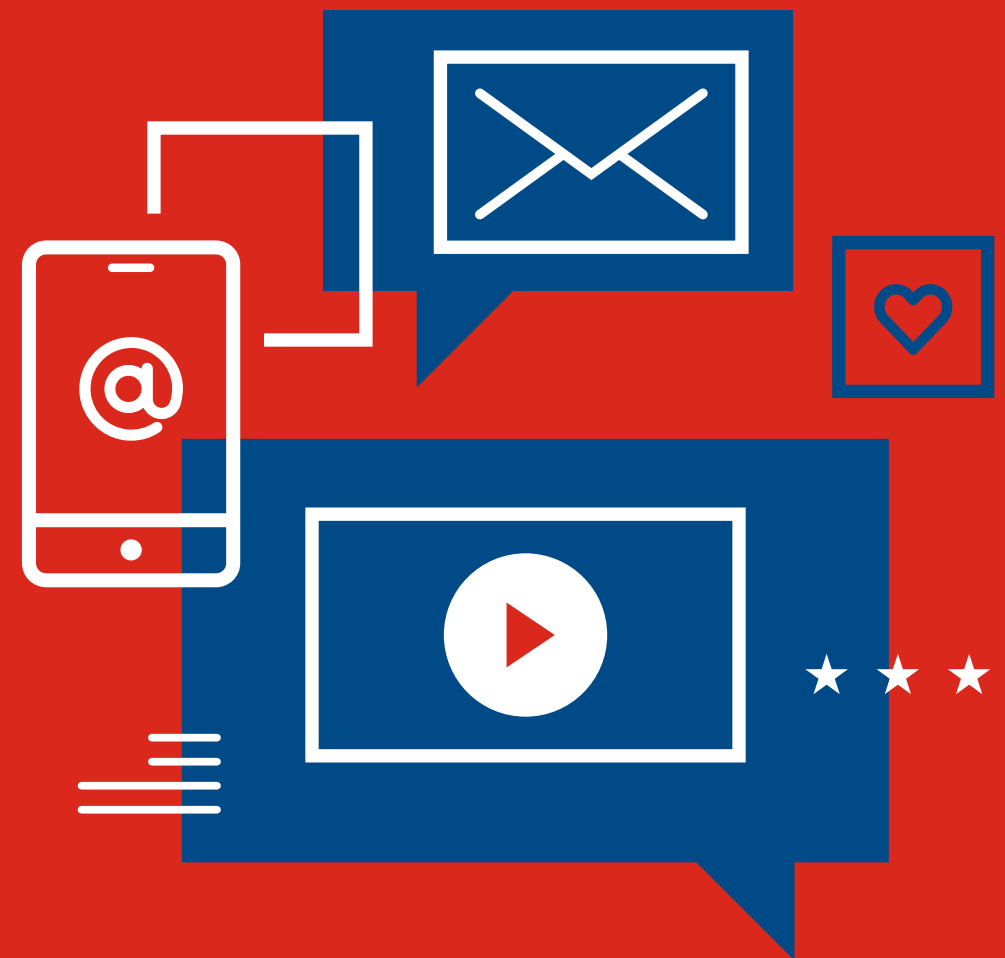
## Political media in the United States has undergone a massive transformation over the past three decades.

### What's driving this shift?

**In a word: technology.** The meteoric rise of digital media means more channels, more complexity, and more sleepless nights for Political Strategists who are constantly having to evaluate—and reevaluate—channels to drive voter action across the election cycle. From promoting town halls to fundraising to driving voter action, choosing the right channels is now key to delivering the win. This is no easy task in a noisy, oversaturated political media world that people are tuning out.

And channel evaluation is just one piece of the puzzle. The voter landscape is constantly evolving. It's getting younger and more diverse. This shift is having major implications on how people follow and engage in politics. Meeting these voters where they are is critical to success. Today's campaigns need intelligence to help them target the right voters and reach them with the right message at the right time.

In the next chapters, we'll explore this paradigm shift in the political landscape and how it has ushered in a new era in campaigning. We'll also look at how you can overcome the challenges and maximize the opportunities to deliver the win for your campaign.



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# Demographics are shifting seismically

The electorate that will vote in 2020 looks a lot different from the electorate that voted in 2016.





**In 2020, nonwhites will account for a third of eligible voters.<sup>1</sup>**

**That's the largest number in history.**

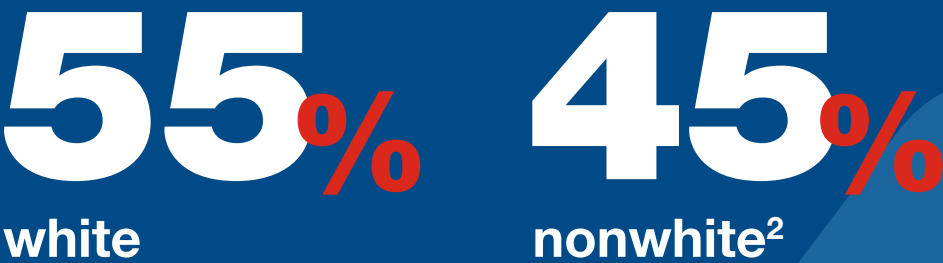
This shift is being driven by long-term increases among certain groups, especially Latinx.



All major racial/ethnic groups voted in higher numbers in 2018, but the biggest gains accrued to Democratic-leaning Latinx and Asian Americans—up 13% since 2014.<sup>2</sup>

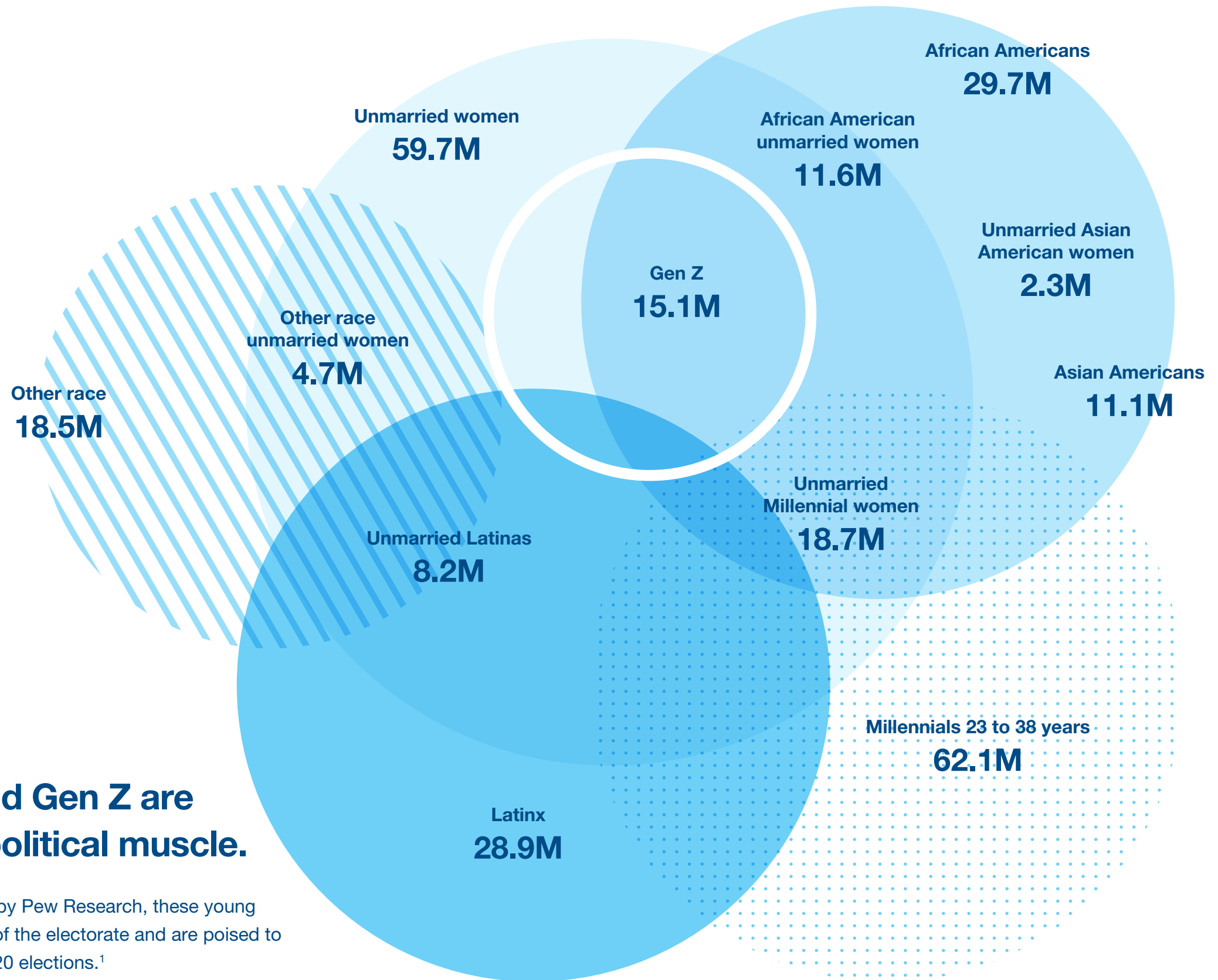
1. Anthony Cilluffo and Richard Fry, "An early look at the 2020 electorate," Pew Research Center Social & Demographic Trends, January 30, 2019.  
2. William H. Frey, "2018 voter turnout rose dramatically for groups favoring Democrats, census confirms," Brookings, May 2, 2019.

**In 2020:  
Eligible Gen Z voters  
are expected to be**



**In comparison, Baby Boomers  
and older generations are  
projected to be about 74% white  
in 2020, according to Pew.<sup>1</sup>**





# Millennials and Gen Z are flexing their political muscle.

According to a new study by Pew Research, these young Americans make up 37% of the electorate and are poised to play a major role in the 2020 elections.<sup>1</sup>

Source: Celinda Lake, Joshua Ulibarri, Kelsey Bullis, and Alexis Cantor, "A Demographic Profile of the Rising American Electorate in 2018," Voter Participation Center, 2018.

1. Stef W. Kight, "Millennials and Gen Z will make up 37% of the 2020 electorate," Axios, January 30, 2019.

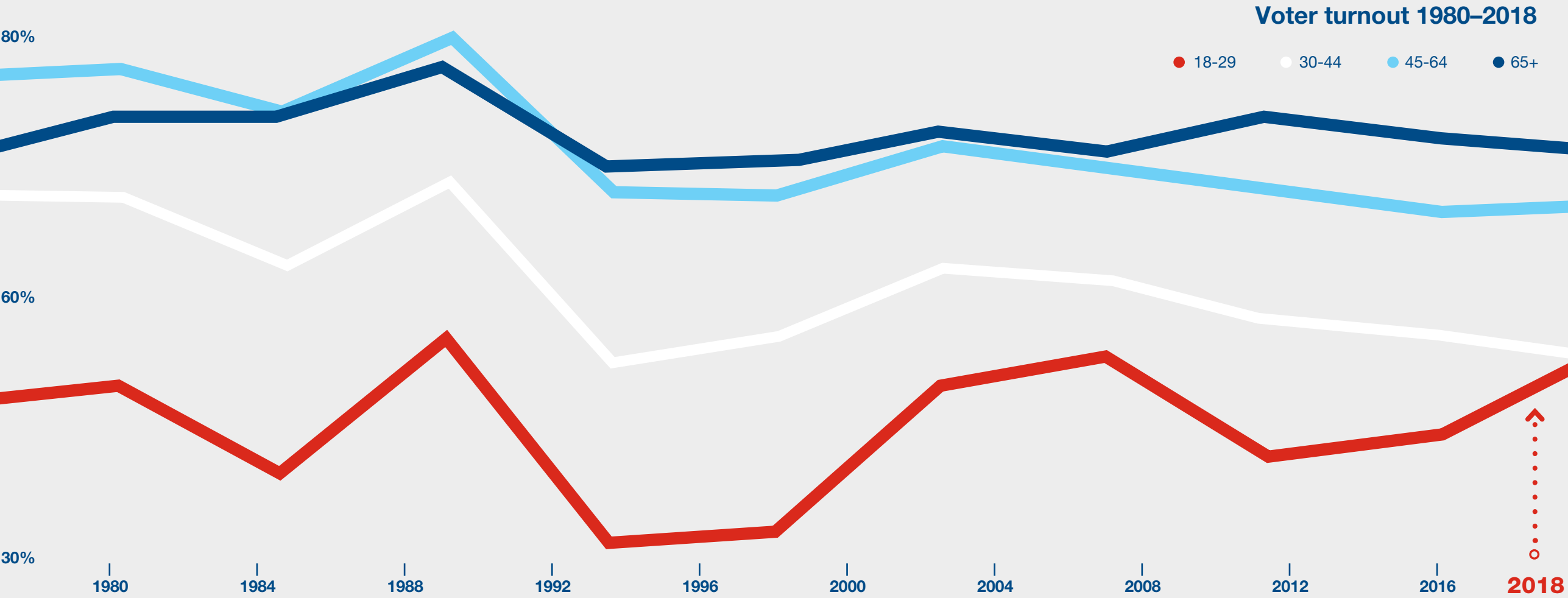
# Measuring the impact.

Looking at recent elections helps us understand the potential impact of this demographic shift in 2020.

Historic voting for presidential elections in particular shows the youngest demographics consistently voting the least.

According to Census data, 71% of eligible voters 65 years old or older and voters 45 to 64 years old voted in 2016. Less than half of eligible 18- to 29-year-olds voted.<sup>1</sup>

Despite promising numbers in 2020, it's critical for campaigns to motivate this younger demographic to vote.



1. Niall Ferguson and Eyck Freymann, "The Coming Generation War," The Atlantic, May 6, 2019.



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## Rallying young voters is working.

One of the big successes of 2018 was rallying younger people to vote. Most notably, campus voting rates more than doubled in four years from 19% in the 2014 midterms to 40% in the 2018 midterms.<sup>1</sup>

It's projected that more younger people than ever will be voting in 2020. This makes them a sought-after constituent and why campaigns need to make them a priority in their outreach efforts.



# VOTEVOTEVOTEVOTE



1. B.J. Rudell, "Will young voters be the difference makers in 2020?"  
The Hill, September 24, 2019.





# What sets younger generations apart

“

Young people come from a very different set of experiences and have seen America in a different way than older voters. This drives their thinking about issues.<sup>1</sup>

—Heather Hargreaves, Executive Director of NextGen America



1. Jessica Yarvin, "The game for 2020 Democrats: wooing Millennials," PBS News Hour, Feb 15, 2019.



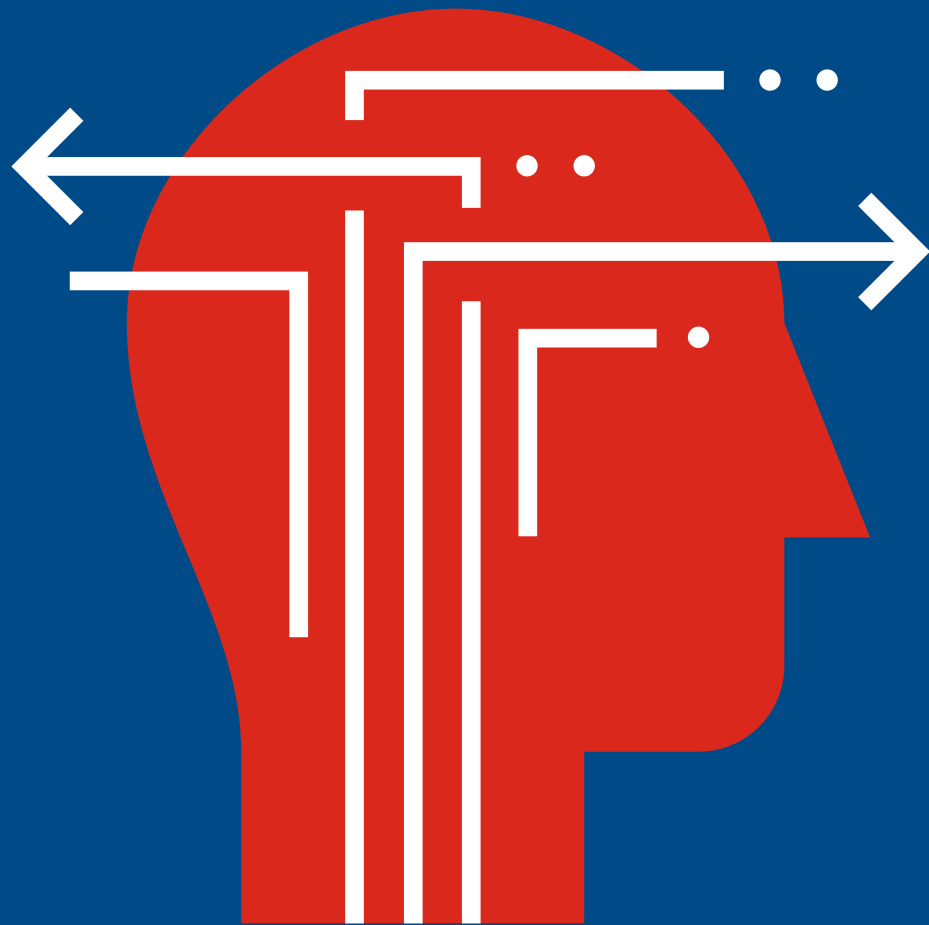


**Motivating  
younger voters  
starts with  
understanding  
their mindset.**





# The Millennial mindset.



1 They lived through 9/11 and a major recession at an impressionable age.

2 In their lifetime, the United States has been at war more years than not.

3 Rising healthcare costs and student loan debt weigh them down.

4 They are less optimistic about the “American dream.”



# The Gen Z mindset.

Gen Z have not known a world before 9/11 and the recession.

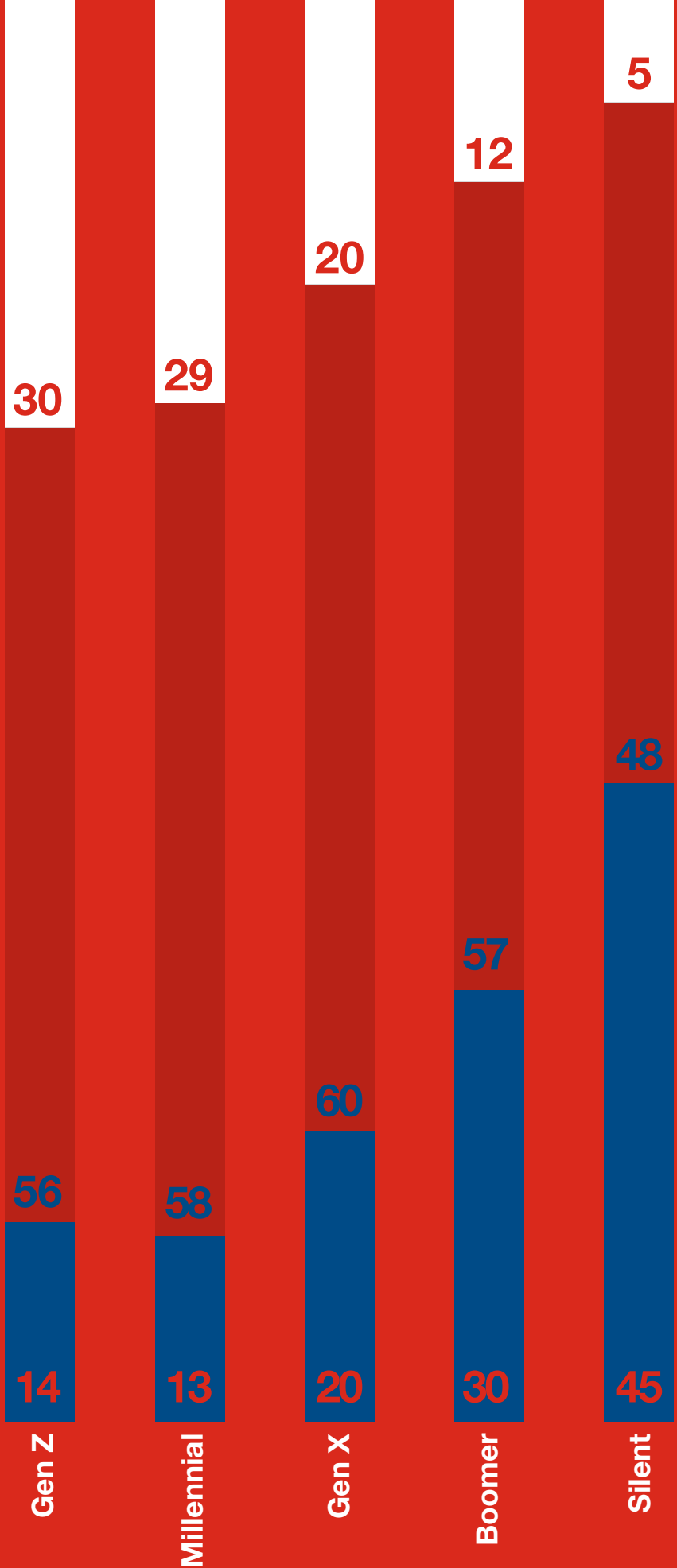
They are uncertain in this post-economic crash world.

Many are still hopeful and motivated to change the world for the better.

Gen Z are unlike any generation before them in how they bridge the human and digital worlds.<sup>1</sup>

% saying...

- There are other countries better than the U.S.
- The U.S. is one of the best countries, along with some others
- The U.S. is better than all other countries in the world<sup>2</sup>

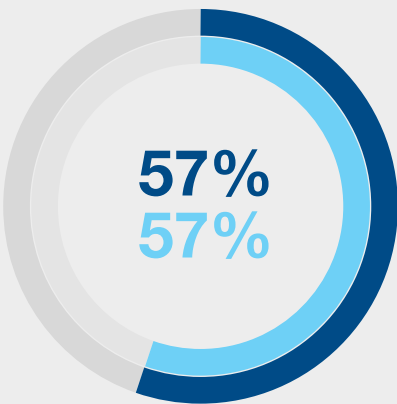


1. Lionel Menchaca, "Not Your Parent's Internet," Velocetize, August 21, 2019.  
2. Kim Parker, Nikki Graf, and Ruth Igielnik, "Generation Z Looks a Lot Like Millennials on Key Social and Political Issues," Pew Research Center Social & Demographic Trends, January 17, 2019.

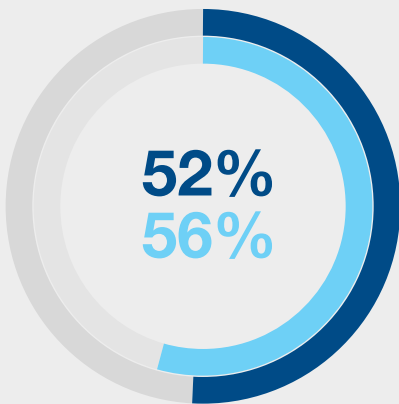
# The skeptical mindset among young voters drives their aspirations.

Having children and other traditional signs of adulthood “success markers” do not top their list of ambitions.

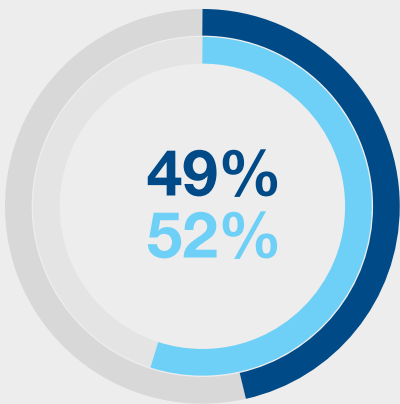
● Millennials ● Gen Z



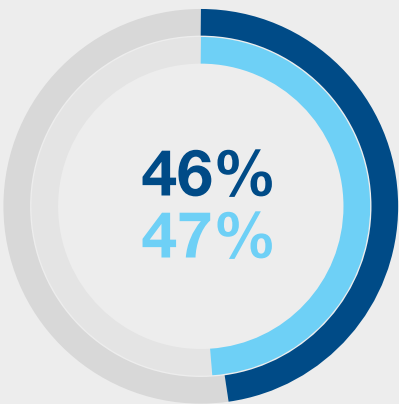
See/travel the world



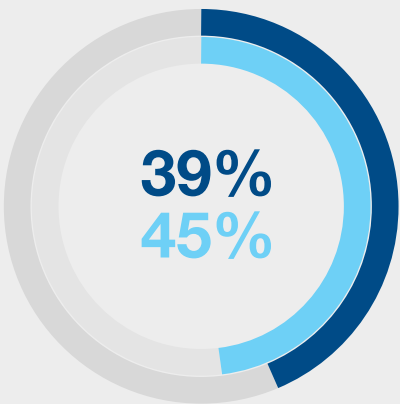
Earn high salaries/  
be wealthy



Buy homes of their own



Make a positive impact  
on community/society



Have children/start  
families

1. “The Deloitte Global Millennial Survey 2019 Societal discord and technological transformation create a ‘generation disrupted,’” Deloitte, 2019.

## Economic and political optimism are at record lows.

According to a recent Deloitte survey of Millennials and Gen Z, respondents expressed a strong lack of faith in traditional societal institutions, including mass media. They are pessimistic about social progress.<sup>1</sup>

And they are disillusioned. They're not particularly satisfied with their lives, their financial situations, their jobs, government and business leaders, social media, or the way their data is used.

On a positive note, this mindset can encourage them to mobilize, with the right engagement and encouragement.

“

To win Millennial voters' trust on issues, candidates have to prove they care and are not simply pandering. You could have the best social team and digital team and do effective targeting, but if you don't have an authentic message that appeals to young people you're not going to get them to support you.

—Heather Hargreaves, Executive Director, NextGen America<sup>2</sup>

1. "The Deloitte Global Millennial Survey 2019: Societal discord and technological transformation create a 'generation disrupted'," Deloitte, 2019.

2. Jessica Yarvin, "The game for 2020 Democrats: wooing millennials," PBS News Hour website, February 15, 2019.



## Different generations consume different media.

**Personalization is the key to meeting each generation where they are.**

What separates Gen Z from the voter pack is that they are a mobile-first generation. And their attention span is dwindling. Studies show that Gen Z have an attention span of about 8 seconds compared to Millennials at 12 seconds.<sup>1</sup>

Research by the design and innovation firm Altitude found that Gen Z's short attention span is more like a highly evolved information filter, enabling them to sort through mountains of available information in search of what suits their interests.<sup>2</sup>

They are also more selective about interacting with media and messages. This generation's skepticism along with their unique ability to filter large volumes of information is making it harder for campaigns to get their political ads past the filter.

1. "The 11 Generation Z Statistics Advertisers Must Know," MediaKix, November 12, 2018.  
2. "The Everything Guide to Generation Z," Vision Critical with research by Maru/VCR&C.



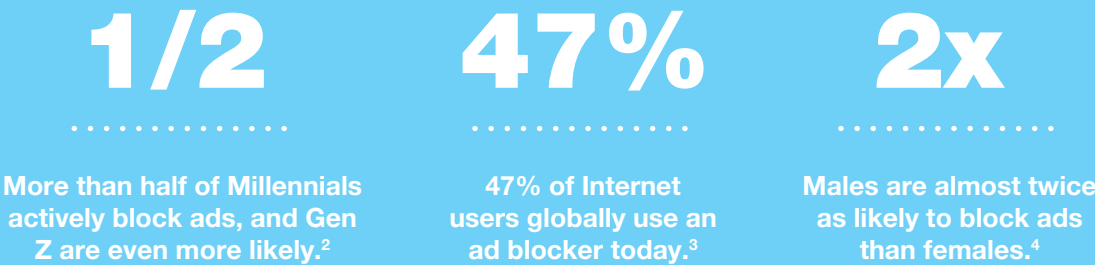
# As voters get younger, traditional media use gets lower.

Average weekly TV usage:



However, digital media consumption is also limited by young constituents. A groundbreaking generational study shows that it’s clear that they focus their attention on what interests them and block out the noise.<sup>1</sup>

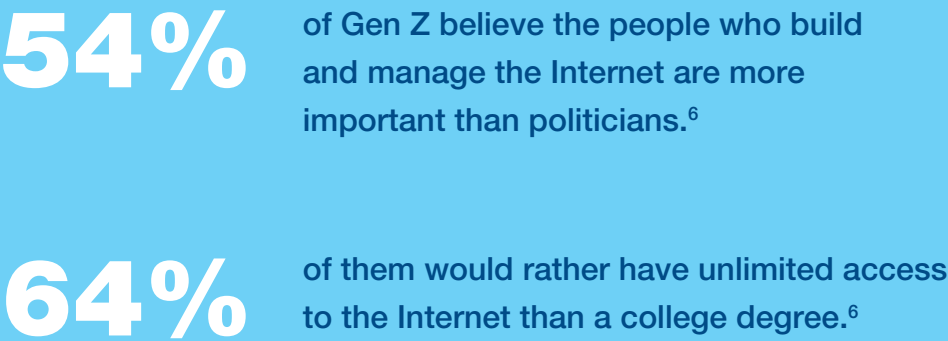
Millennials and Gen Z are both actively avoiding ads. Young men in particular are early adopters of ad blocking software.



Here’s how participants responded when asked “as digital advertising increases, how has your usage of ad blockers changed compared to one year ago?”<sup>5</sup>

More	38%
About the same	36%
Less	4%
Never used ad blockers and never plan on it	9%
Never used ad blockers but would consider using them	14%

Despite selectivity, it’s clear that digital still reigns in the lives of these Gen Z voters in particular. In fact:

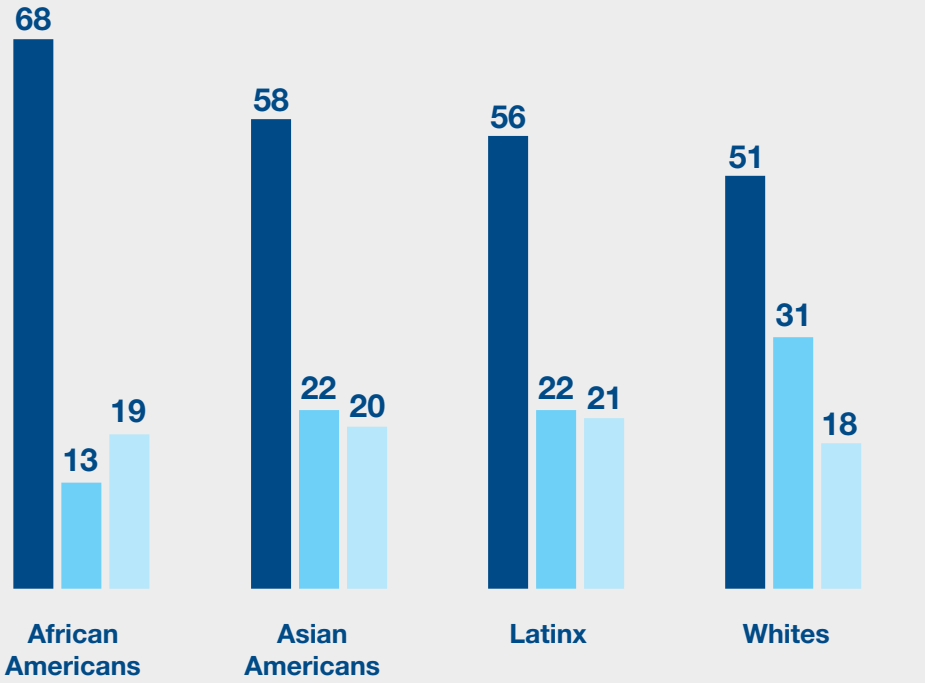


1. Felix Richter, “The Generation Gap in TV Consumption,” Statista, August 19, 2019.  
2. “OOH Can Reach Millennials and Gen Z More Than Any Other Form of Advertising, Here’s Why,” Billups, February 28, 2020.  
3. “Global Ad-Blocking Behavior,” GlobalWebIndex, 2019.  
4. “Ad Blocking: Consumer Usage and Attitudes,” IAB UK, February, 2019.  
5. “Shifting Voter Mindsets Survey,” SurveyMonkey research conducted on behalf of the United States Postal Service, January 12 to February 10, 2020.  
6. “Reality Bytes: Second Annual Generational Study Reveals How Gen Z Behaves, Buys & Builds Online,” The Center for Generational Kinetics and commissioned by WP Engine, Business Wire, January 30, 2019.



# The minority vote is even more skeptical about politics today.<sup>1</sup>

Here's how the following demographics feel about the direction the country is going:



- On the wrong track
- Generally headed in the right direction
- Not sure

1. "Politics Towards the 2020 Election by Race and Ethnicity," GenForward, October 2019.







# Young voters and their evolving relationship with politics

The youth vote was key in the 2018 midterms and will be crucial in the 2020 presidential election.





Young voters are making their voices heard.

And they're voting in big numbers.

62.2M

The three younger generations—Gen X, Millennials, and Gen Z—cast 62.2 million votes, compared with 60.1 million votes cast by Baby Boomers and older generations.<sup>1</sup>

What's driving this increase in voter action? Young voters are more engaged than they used to be.

1. Anthony Cilluffo and Richard Fry, "Gen Z, Millennials and Gen X outvoted older generations in 2018 midterms," Pew Research Center, May 29, 2019.  
2. Jaden Deal, "Youth Political Engagement and Hope Ahead of the 2020 Election," Harvard Political Review, November 18, 2019.



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The Harvard Public Opinion Project 2019 poll indicated that 30% of young voters ages 18 to 29 consider themselves to be politically engaged or active.<sup>2</sup>

Millennials are outpacing Baby Boomers when it comes to engagement.

Millennials are more likely to be engaged in the political process in a range of different ways than Baby Boomers.



21%

Approximately 21% of Millennials have contributed money to a political campaign in the last year compared to 14% of Baby Boomers.<sup>1</sup>

1 in 5

Roughly 1 in 5 Millennials has attended an in-person rally or meeting in the last year compared to 10% of Baby Boomers.<sup>1</sup>

13%

And 13% of Millennials have volunteered for a political campaign in the last year versus 5% of Baby Boomers.<sup>1</sup>

1. Kristen Miles, "Key Political Engagement Differences- Millennials Versus Baby Boomers," October 23, 2018.

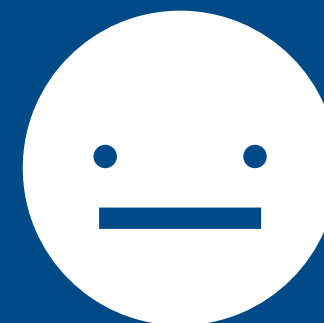
## Skepticism does not equal pessimism.

Research shows that, despite their skepticism, young Americans still have hope for the future and the role their generation will play in shaping it.

42% 

In fact, data from the Harvard Public Opinion Project also shows that 42% of young Americans feel hopeful for the future of America, compared to only 31% in 2017. Meanwhile, only 46% feel fearful about the nation's future, compared to a previous 67%.<sup>2</sup>

**Gen Z have inherited the skepticism but not the pessimism of their parents. They're a happy generation with a nose for corporate fakery.<sup>1</sup>**



1. "The Everything Guide to Generation Z," Vision Critical with research by Maru/VCR&C.

2. Jaden Deal, "Youth Political Engagement and Hope Ahead of the 2020 Election," Harvard Political Review, November 18, 2019.

# For younger voters, it's all about authenticity and trust.

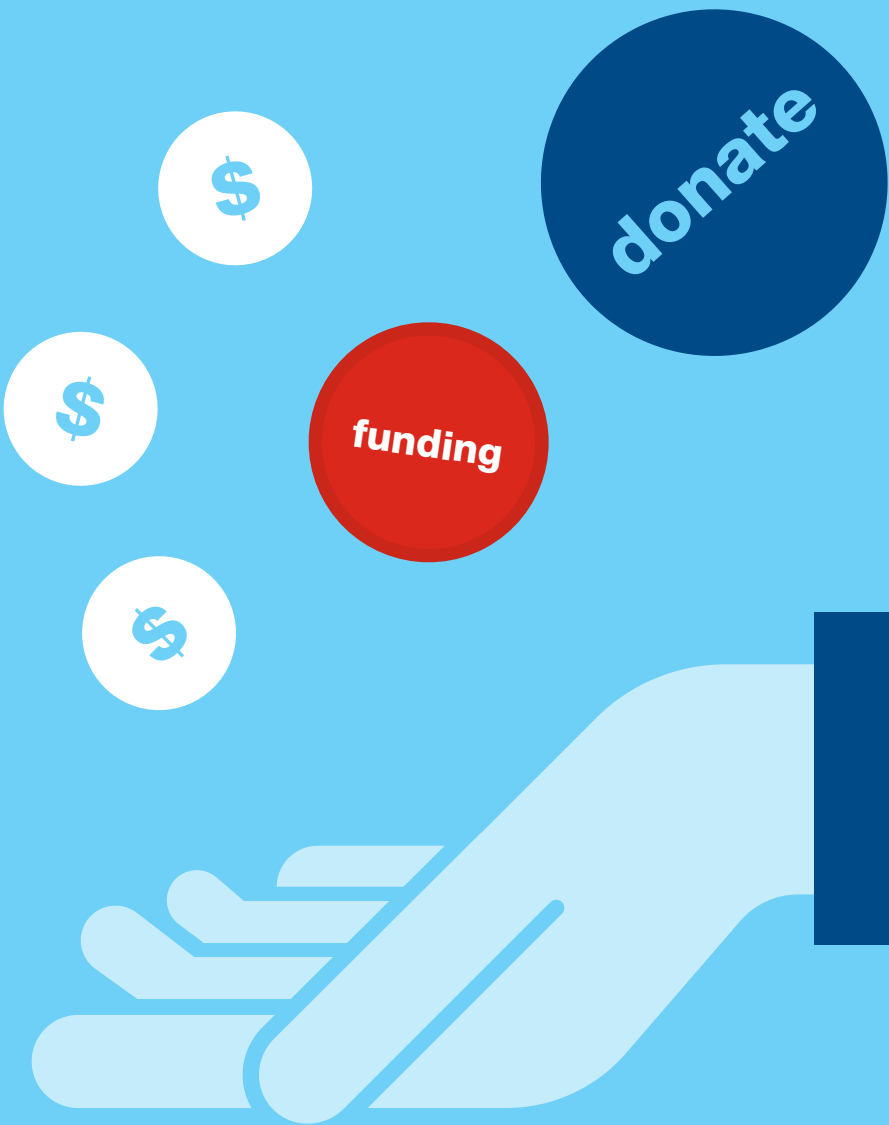
When authenticity and trust in a candidate intersect with core values, young voters are more likely to get out their wallet and donate to someone or something they believe in.

2.1M

An estimated 2.1 million youth (ages 18 to 24) contributed to a party or candidate in the 2018 midterm election cycle.<sup>1</sup>

11%

It's also notable that for some groups of younger voters, the donation rate was high in 2018. For example, 11% of young Latinx said that they donated to a campaign.<sup>1</sup>



1. "Voting with their Wallets: The Largely Untapped Potential of Youth As Political Donors," Circle, September 13, 2019.

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# What this all means for political campaigning

Authentic, data-driven messages are the key to  
connecting with today's young voters.







# Key digital channels are no longer supporting political ads.

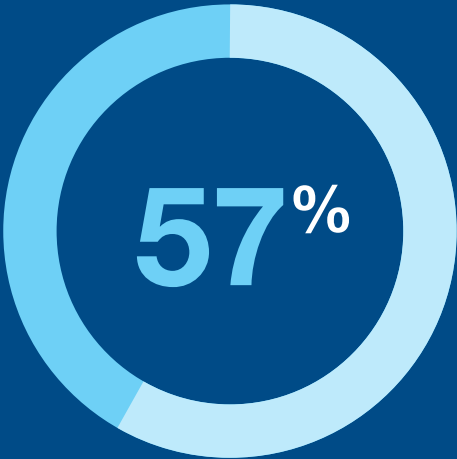
The ban on political advertising by a top social media platform and new targeting limits imposed by a leading search engine company present a new conundrum for political consultants. Campaigns will no longer be able to micro-target and tailor ads to people’s specific data and behavior on these digital channels—a key ability in helping campaigns reach the right voters.

However, Gen Z in particular now expect personalization and relevance in nearly all interactions. This means political campaigns need to find new ways to deliver authentic, data-driven messages that break through the clutter.

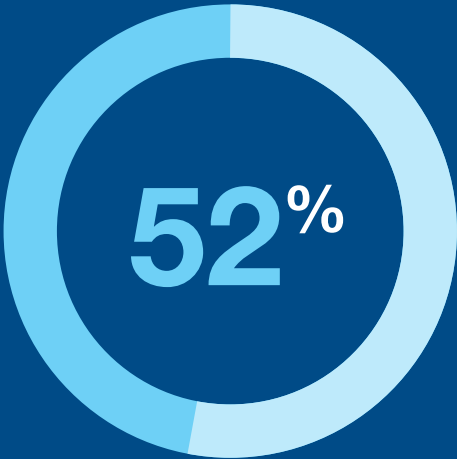


This creates a big opportunity for direct mail targeting, which is seen as less intrusive and more credible.

★ Two most credible political outreach techniques<sup>1</sup> ★




Percentage of surveyed voters who believe that mail sent to their home is one of the top three most credible political outreach techniques.



Percentage of surveyed voters who believe that TV ads are one of the top three most credible political outreach techniques.

1. “Survey Offers Key Insights on Political Mail in Florida, Ohio Midterm Elections,” The United States Postal Service, February 2019.



# What do younger voters want?

# 30%

of surveyed voters ages 18 to 22  
prefer a mix of channels when  
it comes to political advertising.<sup>1</sup>

1. "Shifting Voter Mindsets Survey," SurveyMonkey research conducted on behalf of the Postal Service, January 12 to February 10, 2020.



## Delivering on authenticity and integrity.

According to a 2019 youth poll from the Institute of Politics at Harvard Kennedy School, integrity is the top attribute that voters ages 18 to 29 are looking for in a candidate.<sup>1</sup>

A strong narrative and a dedication to building relationships are both crucial to mobilizing young voters—for registering, fundraising, and ultimately encouraging them to vote.



# integrity

1. "Amidst Heightened Engagement and Rise of Warren, Sanders' Once Commanding Lead Narrow Among Young Voters," Harvard Kennedy School Institute of Politics, November 5, 2019.



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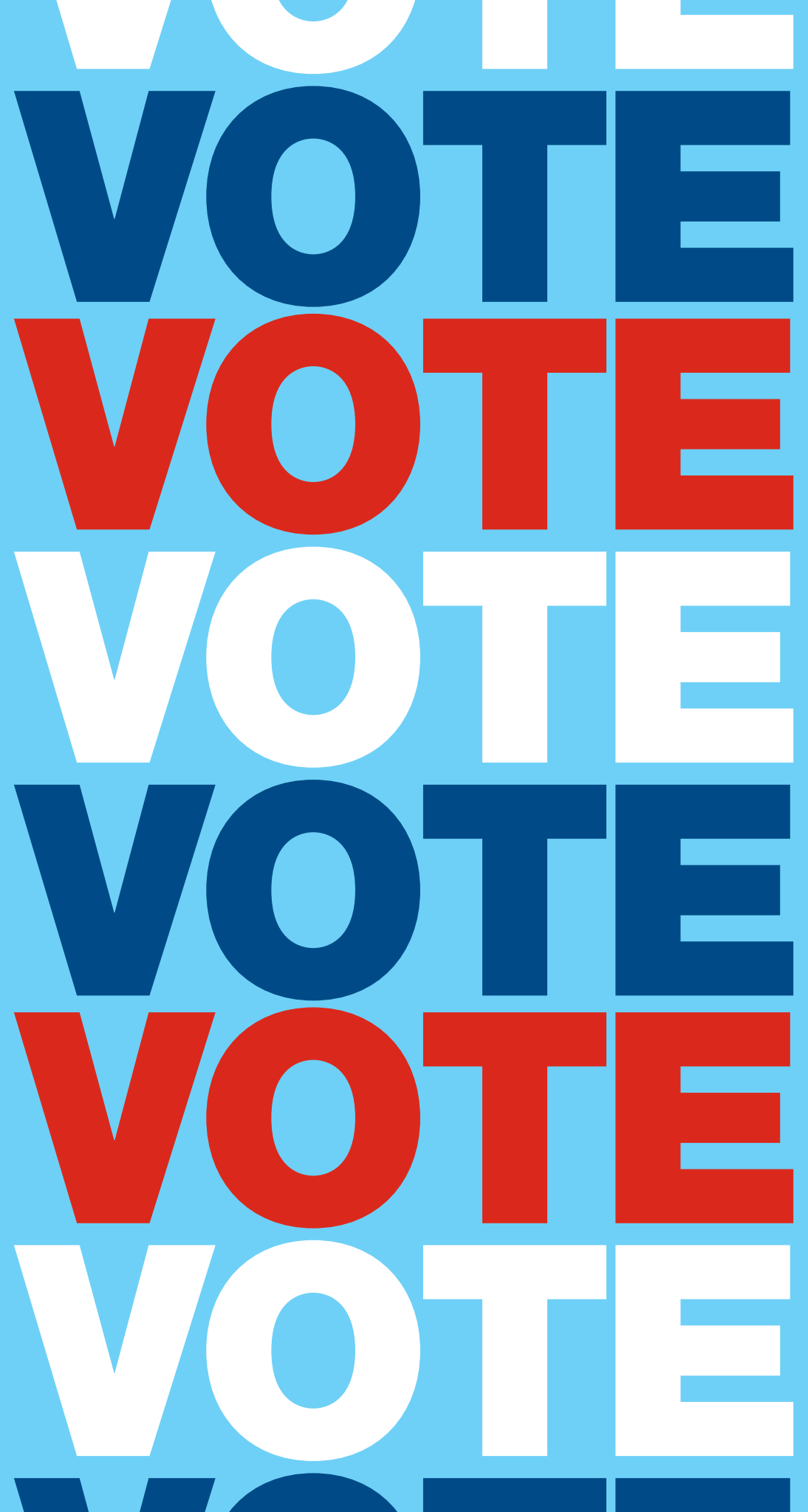
## Inspiring voter registration in a digital world is more complex.

Gen Z are digital natives who have never known a world without the Internet. They are used to getting nearly everything they want or need with a tap or a click and are not as willing to deal with inconvenience.

Navigating voter registration for the first time or updating information after moving for college, jobs, etc., can seem logistically confusing for this new generation of voters, which can derail them from taking action.

That's why it's so important for your campaign to make the registration process as clear and easy as possible in a way that grabs their attention.

For example: Sending an engaging mail piece that includes a QR Code® that digitally transports them right to the registration site can help boost your efforts with these digital natives by making the process feel easier and more convenient.





# Moving the needle from indecision to decision.

Gen Z do not necessarily fall neatly into party lines. Because they grew up with economic uncertainty, they are more likely to question the status quo and be focused on key issues they see facing their generation now and in the future.



A new Chegg study found that one in three students says that neither the Democratic nor the Republican party reflects their political views.<sup>1</sup>

1. "State of the Student: Dissatisfied, determined, and ready to be heard," Chegg.org, 2019.  
2. "Shifting Voter Mindsets Survey," SurveyMonkey research conducted on behalf of the United States Postal Service, January 12 to February 10, 2020.

Q.

Which of the following best describes your behavior when it comes to making a voting decision?

A.

39% said they are Undecided Researchers.<sup>2</sup>



# The direct mail opportunity

The key to delivering the win: strategically break through the clutter to deliver authentic, trustworthy messages that motivate action among voters.

Direct mail can help you do all of that and more.





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**Younger voters don't  
see online and offline  
as mutually exclusive.**

**And neither should  
political campaigns.**

A data-driven, integrated multi-channel campaign is a two-way street. It can capture attention while also allowing a campaign to deliver a strong, authentic message that can't be ignored.

Direct mail is an essential part of your integrated campaign.

**Young surveyed  
voters feel they  
are less likely  
to encounter  
fake news in  
mail than in any  
other political  
advertising.<sup>1</sup>**





## Mail technologies have evolved as voters have evolved.

Direct mail no longer stands alone. It helps you power an impactful and connected campaign.

The following chapters explore some of the innovative technologies that are driving today's direct mail—to help you drive voters to action.



Today’s voters expect personalization and relevance. Direct mail retargeting delivers both.

Being strategic about how you use data from web behaviors and site visitor demographics can help you make your messaging feel relevant to voters. Direct mail retargeting allows your campaign to follow up shortly after a constituent visits your site with personalized messaging based on their behavior or interest.

USPS Shifting Voter Mindset Survey:

Q. Would a mail piece from a political candidate that’s personalized to you increase your likelihood of responding to the message?

A. 38%

38% of voters ages 18 to 22 said it would increase the likelihood.<sup>1</sup>

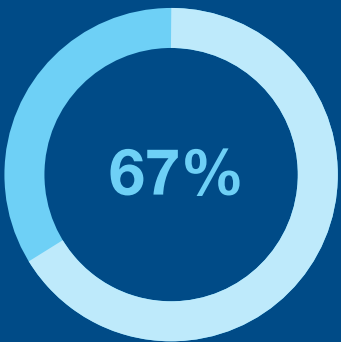
1. “Shifting Voter Mindsets Survey,” SurveyMonkey research conducted on behalf of the Postal Service, January 12 to February 10, 2020.

Retargeting in action.

Let’s say that a site visitor clicks on your “Platform,” “Donate,” or “Learn More” links. Direct mail retargeting software allows you to send an engaging mail piece to continue the conversation with similar or even bonus content. This shows that you’re listening and want to mobilize constituent action.

300%

Retargeting works: Direct mail campaigns paired with digital activity have realized a return on investment as high as 300%.<sup>2</sup>



Remember, 67% of Gen Z believe that websites will know what they’re looking for before they do anything, and 40% said they would stop visiting a website altogether if it didn’t anticipate what they needed, liked, or wanted.<sup>3</sup>

2. “Digital Direct Mail: Turn Intent into Action,” Reach Dynamics, 2019.  
3. Mary Ellen Dugan, “For Generation Z the digital Experience is the human experience,” AdAge, February 5, 2019.

# Informed Delivery

Three touchpoints. Three opportunities. One mail piece.

Meeting mobile-first voters where they are starts with a multi-channel approach. The USPS® Informed Delivery® feature gives voters the ability to preview and interact with their mail from anywhere, on their computer, tablet, or mobile device as well as their mailbox. They receive digital previews of their incoming mail via email notification or the Informed Delivery online dashboard.

Informed Delivery gives your campaign three opportunities to make an impact with voters:



Physical mail piece



Email preview



Interactive Ride-along Image

All from a single mail piece.

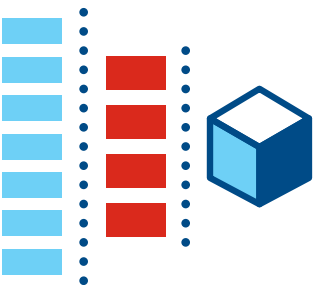
## What is an Informed Delivery Ride-along Image?

Direct mail can be accompanied by colorful supplemental content. The clickable Ride-along Image directs your constituents to a digital experience, allowing them to simply click and interact with your campaign before your piece arrives in their mailbox that day.

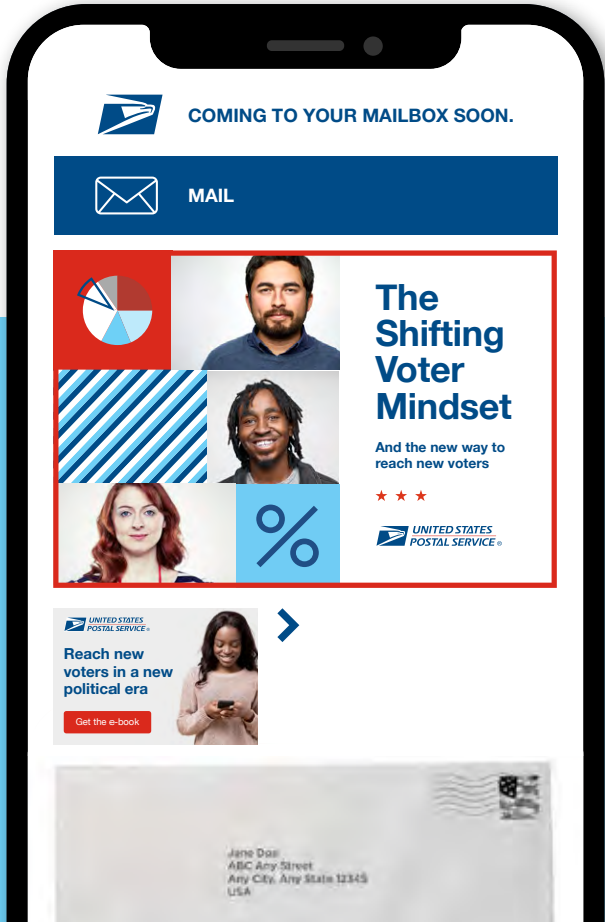


# Informed Visibility

Campaign coordination + message reinforcement = relationship building.



The Informed Visibility® feature from USPS offers data tracking as your direct mail travels within the mailstream. This means you know where individual mail pieces are every step of the way. This includes when your direct mail pieces reach key constituents so you can seamlessly coordinate all your campaign efforts across channels to reinforce your message.







## We know your campaign is not “one size fits all.”

Navigating this constantly shifting political advertising landscape can be challenging. Working with the right partner with the right expertise can be your ticket to ensuring success.

USPS offers dedicated Political Mail Strategists with the experience and expertise to help your campaign harness the credibility and memorability of mail to drive voter action. We know your campaign is not “one size fits all.” Your strategist will work closely with you to help determine how to best integrate direct mail within your media mix strategy to ensure the best possible outcome.

As the 2020 election cycle kicks into gear, now is the time to take advantage of our expertise to help you deliver the win.





**Contact a Political Mail Strategist  
now to help your campaign create  
a winning mail strategy at  
[deliverthewin.com/strategist](https://deliverthewin.com/strategist)**

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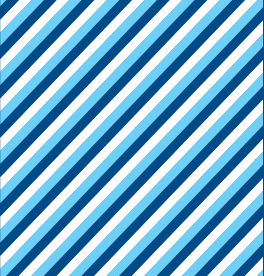
**RESEARCH SHOWS  
THAT YOUNG VOTERS  
ARE DRIVEN BY  
AUTHENTICITY AND  
CREDIBILITY.**





# THE SHIFTING VOTER MINDSET





**UNITED STATES  
POSTAL SERVICE®**

# The Shifting Voter Mindset

Why direct mail is the new  
way to reach new voters

