



Office of Inspector General | United States Postal Service

RISC Report

Generation Z and the Mail

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Executive Summary

Generations are molded by the social, economic, and technological contexts in which they are raised. Generation Z (also called Gen Z or Gen Zers), currently between 8 and 23 years old, is shaping up to be more diverse and better educated than previous generations.¹ Gen Z has also grown up with endless connectivity and social media as a part of daily life.

For this digitally native generation, is there an awareness of the Postal Service and its products? To understand Gen Z's engagement with mail, the U.S. Postal Service Office of Inspector General (OIG) surveyed youth aged 13 to 18 years old about their awareness and use of mail, and how they decide to communicate with their family and friends.² As parents actively and indirectly influence Gen Z's values and behaviors, especially for minors who live at home, we also surveyed one parent of each Gen Z respondent.

The majority of surveyed Gen Zers were familiar with the Postal Service and what it does. Approximately 79 percent of Gen Zers reported seeing cards, letters, advertisements, and other mail and packages that get delivered to their homes. Over half of Gen Zers also reported that they enjoyed receiving mailed advertisements, including retail catalogs and coupons. We learned that parents play an influential role in their children's awareness and knowledge of the Postal Service including through shared experiences, such as bringing them along when they visit the post office.

The OIG also compared Gen Zers' use of mail, technology, and other communication methods across different social situations. Unsurprisingly, in-person communication is prized. Digital channels are preferred for their immediacy in situations such as making plans or keeping up to date with family and friends, for example. However, Gen Zers recognize mail as a way to convey emotional connection. In fact, more Gen Zers said that receiving cards, letters, and packages makes them feel happy than receiving video calls, emails or texts. They prefer mailing cards and letters over digital communication methods for

Highlights

Despite being a digitally native generation, we found Gen Zers are familiar with USPS and the majority both send and receive mail and packages.

Parents play an influential role in teaching their Gen Z children about the value of mail and there are opportunities for USPS to engage with parents and youth to build awareness.

Mail has a role as a complementary communication channel for Gen Z to convey emotional connection. More Gen Zers reported feeling happy and excited receiving a card or letter than they did with a video call, email or text.

USPS could identify new ways to educate and boost awareness of mail with Gen Z and it could find new venues to share findings on mail's enduring value with industry professionals.

Ongoing research into Gen Z is important as communication preferences and needs continue to evolve.

sending wishes or congratulations; they believe mail makes the recipient feel special and shows they took the time to prepare and send a card. These results illustrate how mail has value and relevance for Gen Z in certain contexts.

This research holds implications for the Postal Service and the mailing industry. We highlight some ways USPS could leverage and encourage shared postal

¹ Generation Z is defined in this paper as youth born between 1997 and 2012; More Gen Zers are enrolling in post-secondary school compared to Millennials and Gen Xers. For more information, see Kim Parker and Ruth Igielnik, "On the Cusp of Adulthood and Facing an Uncertain Future: What We Know About Gen Z So Far," Pew Research Center, May 14, 2020, <https://www.pewsocialtrends.org/essay/on-the-cusp-of-adulthood-and-facing-an-uncertain-future-what-we-know-about-gen-z-so-far/>.

² The OIG previously conducted similar research on the Millennial generation. See: U.S. Postal Service Office of Inspector General, *Millennials and the Mail*, Report Number RARC-WP-18-011, July 30, 2018, <https://www.uspsog.gov/sites/default/files/document-library-files/2018/RARC-WP-18-011.pdf>.

experiences between parents and their Gen Z children in order to boost awareness with Gen Z and educate them on postal products and services. USPS and mailing industry stakeholders could also build on the emotional connection Gen Z associates with mail to further promote it as a useful complement to other communication and advertising channels. For example, USPS could explore new venues to share research and use cases with the marketing industry and other stakeholders on the unique ways mail can be an effective channel to reach Gen Zers.

Finally, this white paper's survey results point to potential future areas of generational research. While the Postal Service conducts ongoing market research into customers aged 18 and older, such as the USPS Mail Moments report, it has not yet surveyed younger Gen Zers or the full cohort. We highlight several actionable research strategies USPS can explore in the future as Gen Z transitions into adulthood. Insights from this research could help USPS encourage Gen Z to engage with postal products and services. Continued analysis of Gen Z's engagement with mail and USPS is vital as this cohort reaches adulthood and their communication preferences, behaviors, and needs change.

Observations

Introduction

Following on the heels of Millennials, Generation Z is growing up to be socially conscious, digitally connected from birth, and better educated compared to other generations.³ Generation Z (also called Gen Z and Gen Zers) represents youth born between 1997 and 2012.⁴ Research on Gen Zers is pivotal to the Postal Service at this time because it captures foundational data on their behaviors and provides a snapshot of their developing opinions. This cohort represents a new generation of young customers for the Postal Service, who are still learning about the value of its products and services.

The OIG conducted a nationally representative survey of Gen Zers between the ages of 13 and 18 and their parents with a research lab at the University of Minnesota.⁵ The sample consisted of 403 Gen Zers paired with one parent for a total of 806 individual respondents. The addition of matched parent survey data provided insights about parents' integral influence on youth mail engagement and communication behavior. The OIG also reviewed publicly available and internal USPS market research reports and interviewed USPS management and external stakeholders. The objectives guiding this research were to identify how Gen Zers and their parents engage with mail and USPS; explore the important considerations for how Gen Zers choose which communication method to use to connect with their families and friends; and identify key factors about Gen Z that USPS could consider in its future research and engagement of youth. See [Appendix A](#) for more details on the objective, scope, and methodology.

Background: The Significance of Gen Z for the Postal Service

At an estimated 67.4 million individuals, Gen Z is now approximately 20 percent of the U.S. population (see [Figure 1](#)).⁶ Gen Zers are presently between the ages of 8 and 23, and a majority live at home with their parents. However, older Gen Zers have begun to enter college and join the labor market, and their estimated \$143 billion in buying power will continue to grow.⁷ As Gen Zers transition to adulthood, the Postal Service will have increasing opportunities to engage with this generation.

Gen Z, Mail, and Technology

As Gen Zers are still relatively young, there is little research on how they engage with mail. However, the available research suggests Gen Zers might still find value in mail. For example, a recent study found that Gen Zers focused longer on printed materials, such as newspapers and magazines, than information they read online.⁸ In addition, over a third of Gen Zers planned to send out greeting cards during the 2019 holiday season.⁹ While the Postal Service has conducted research on individuals over 18 years old, USPS representatives confirmed that the agency has not studied the younger Gen Z segment or full cohort in its own research, but plans to once more of the cohort has reached adulthood and they can be readily studied.¹⁰

3 Kim Parker and Ruth Igielnik, "On the Cusp of Adulthood and Facing an Uncertain Future: What We Know About Gen Z So Far."

4 Michael Dimock, "Defining Generations: Where Millennials End and Generation Z Begins," Pew Research Center, January 17, 2019, <https://www.pewresearch.org/fact-tank/2019/01/17/where-millennials-end-and-generation-z-begins>.

5 The OIG fielded its survey of Gen Z in November and December 2019, completing data collection on December 9, 2019. The data used in this white paper was collected before the President of the United States issued the national emergency declaration concerning the novel coronavirus disease outbreak (COVID-19) on March 13, 2020. Our results do not reflect changes in how Gen Zers engage the mail that may have occurred as a result of the pandemic.

6 This estimate of Gen Z's size reflects the projected number of people in the U.S. between 8 and 23 years old in 2020. U.S. Census Bureau, "2017 National Population Projections Datasets - Projected Population by Single Year of Age, Sex, Race, and Hispanic Origin for the United States: 2016 to 2060 - Main Series," September 2018, <https://www.census.gov/data/datasets/2017/demo/popproj/2017-popproj.html>.

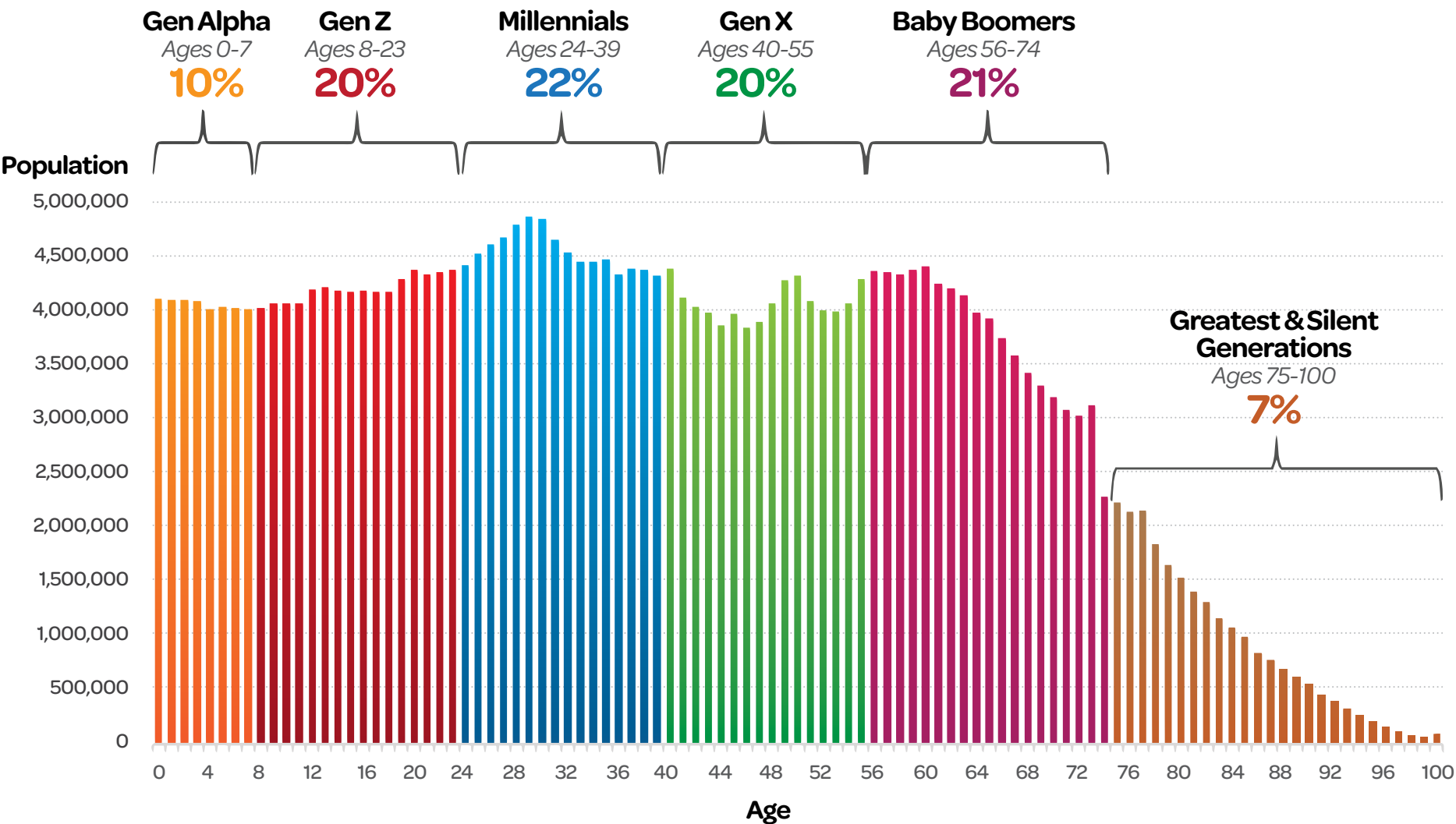
7 Barkley, *The Power of Gen Z Influence: How the Pivotal Generation is Affecting Market Spend*, January 2018, https://www.barkleyus.com/wp-content/uploads/2019/05/Barkley_WP_GenZMarketSpend_Final.pdf.

8 MNI Targeted Media, "Generation Z: Unique & Powerful," November 1, 2018, https://insightlab.mnitargetedmedia.com/wp-content/uploads/2018/05/MNITM_Generation-Z_2018.pdf.

9 YPulse, "2 in 5 Millennials Plan to Send a Holiday Card This Year (& More Holiday Traditions They're Keeping)," December 10, 2019, <https://www.ypulse.com/article/2019/12/10/2-in-5-millennials-plan-to-send-a-holiday-card-this-year-more-holiday-traditions-theyre-keeping>.

10 The Postal Service has segmented out the older Gen Z cohort from ages 18 to 22 in one recent internal study.

Figure 1. U.S. Population by Generation (2020)



Source: U.S. Census Bureau, 2018.

Gen Zers' pervasive Internet connectivity and access to technology have shaped their communication expectations, such as for rapid communication, which has implications for their perception of correspondence mail.¹¹ Nearly all teenage Gen Zers have smartphones at their fingertips and about half of teenage Gen Zers reported using the Internet almost constantly.¹² A majority reported using social media to communicate and feel more connected with others.¹³

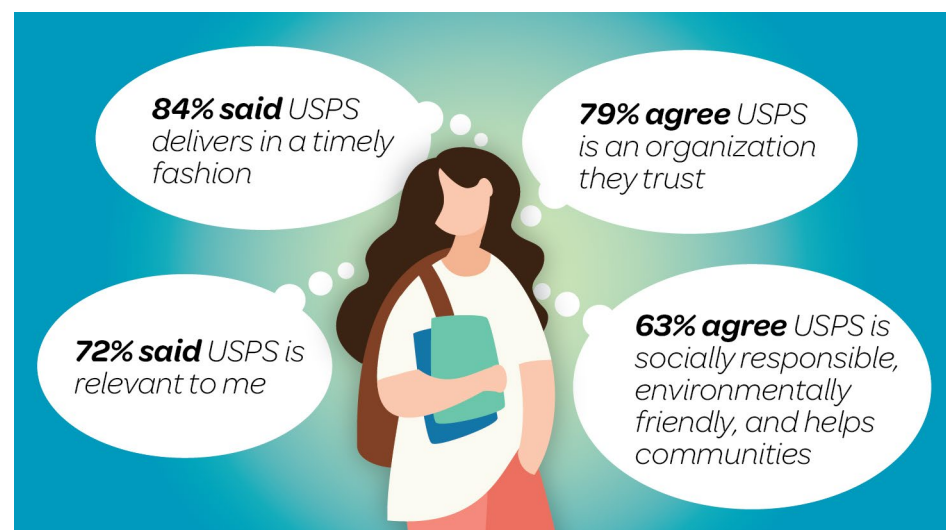
Gen Z Engages with the Postal Service, Mail, and Packages

While this generation uses many digital communication channels, our survey found that many of the Gen Zers surveyed also engage with mail and packages. We examined various aspects of engagement, ranging from their awareness of the Postal Service, knowledge of how to mail, and frequency of sending and receiving mail and packages.

Awareness, Perception, and Knowledge of the Postal Service

Nearly all Gen Zers surveyed (95 percent) reported some familiarity with the Postal Service and what it does. Only a small percentage of Gen Zers (12 percent) have never been to a post office. Additionally, 80 percent reported having a positive impression of the Postal Service, similar to a recent Pew Research Center survey that found USPS to be viewed favorably by a majority of the public.¹⁴ A large proportion of Gen Zers reported that the Postal Service delivers in a timely manner and is an organization they trust and is relevant to them (see Figure 2). This is important because Gen Zers tend to engage with and purchase from companies they find to be trustworthy.¹⁵

Figure 2. Gen Z Perception and Impression of the Postal Service



Note: Percentage who "strongly agree" and "somewhat agree."

Q: To what extent do you agree or disagree that the United States Postal Service (USPS)

Source: USPS OIG 2019 Survey of Generation Z

To explore Gen Zers' knowledge of sending mail, the OIG survey asked them to rate their confidence in their use of stamps and mailing addresses. Using postage stamps — which have been regarded in popular media as an obstacle to mailing — did not appear to be a significant challenge.¹⁶ Less than two percent of Gen Zers did not know what a stamp is used for. Additionally, 85 percent of Gen Zers were at least fairly confident they could find a stamp and 79 percent of Gen Zers knew they had stamps at home. While knowledge of and access to stamps

11 Michael Dimock, "Defining Generations: Where Millennials End and Generation Z Begins"; Gen Zers expect mobile applications and websites to load quickly or they will not use them, reflecting Gen Zers' interest in rapid communication. For more information, see IBM/National Retail Federation, *Uniquely Generation Z: What Brands Should Know about Today's Youngest consumers*, January 2017, <https://www.ibm.com/downloads/cas/9PPL5Y0X>.

12 Monica Anderson and Jingjing Jiang, "Teens, Social Media & Technology 2018," Pew Research Center, May 31, 2018, <https://www.pewresearch.org/internet/2018/05/31/teens-social-media-technology-2018>.

13 Matt Anderson, "Understanding Gen Z Through the Lens of YouTube," Google, August 2018, <https://www.thinkwithgoogle.com/advertising-channels/video/gen-z-and-youtube>.

14 Pew Research Center, *Public Holds Broadly Favorable Views of Many Federal Agencies, Including CDC and HHS*, April 9, 2020, <https://www.people-press.org/2020/04/09/public-holds-broadly-favorable-views-of-many-federal-agencies-including-cdc-and-hhs>.

15 IBM/National Retail Federation, *Uniquely Generation Z*, <https://www.ibm.com/thought-leadership/institute-business-value/report/uniquelygenz>; and Tracy Francis and Fernando Hoefel, "True Gen': Generation Z and its Implications for Companies," McKinsey & Company, November 12, 2018, <https://www.mckinsey.com/industries/consumer-packaged-goods/our-insights/true-gen-generation-z-and-its-implications-for-companies>.

16 Ashley Collman, "College students say they can't send in their absentee ballots because they don't know where to buy stamps," *Business Insider*, September 19, 2018, <https://www.businessinsider.com/young-voters-dont-know-where-to-buy-stamps-for-absentee-ballots-2018-9>.

did not appear to be a significant hurdle for Gen Zers, about 73 percent reported they would mail more cards or letters if they did not have to put a stamp on the envelope — suggesting that pre-paid postage or digital versions of stamps for greeting cards or envelopes may appeal to Gen Zers.

Their knowledge also appears to extend to mailing addresses, with 80 percent of Gen Zers being at least fairly confident that they could address an envelope correctly. This confidence is an important factor driving active engagement with sending mail. The survey results also indicate that the more confident Gen Zers feel about their ability to mail, the more positive their impression of the Postal Service.

The more confident Gen Zers feel about how to mail, the more positive their impression is of the Postal Service.

Strategies for Engagement:

One opportunity for the Postal Service to educate and build further brand awareness would be to continue to strategize and implement programs that focus on both younger and adult Gen Zers. For instance, USPS developed the Greetings from the North Pole Post Office program to actively engage children and youth.¹⁷ It also created the Wee Deliver literacy program in 1990, which is still used in elementary school curriculums today across the nation as a way to help improve reading and writing skills by introducing children to the real-life experience of letter-writing, as well as addressing an envelope and using the mail.¹⁸ USPS could continue to partner with educators to evaluate the ways these programs have been beneficial to students and explore strategies to engage Gen Z students. USPS is also collaborating with mailers, advertisers, and educators to conduct outreach to college-age Gen Zers through the Direct Effect academic program, which teaches students how to apply direct mail as a key part of multi-channel marketing strategies.¹⁹ College students, for example, are challenged to create integrated marketing campaigns for local businesses.²⁰

The Mail and Packages that Gen Z Sends

Nearly two-thirds of the youth surveyed reported sending a greeting card or postcard at least several times a year through the Postal Service. Sixty-four percent of Gen Zers said they like writing and mailing cards and letters to their friends and family. However, Gen Zers did report receiving more mail and packages than they reported sending. For instance, the OIG found that 15 percent of Gen Zers said they have never *sent*

a greeting card, compared to seven percent who reported never *receiving* a greeting card. To understand if Gen Z perceived sending mail to be a challenge, the OIG asked them how easy it was to mail a card or package, and the responses were mostly positive. Four in five Gen Zers agreed that sending letters and greeting cards through the mail is easy. For packages, 72 percent also said sending a package is easy.

The Mail and Packages that Gen Z Receives

A high percentage of Gen Zers said they personally received cards, letters, advertisements, and other mail and packages (see [Figure 3](#)). Greeting cards and school information are reported as the most received type of mail, with 93 percent of Gen Zers reporting receiving them. Greeting cards appear to be primarily seasonal or for special occasions, as most Gen Zers reported receiving greeting cards or postcards several times a year or once a year. Still, about 22 percent reported receiving cards from their friends or family at least monthly. Sixty-three percent of Gen Zers also reported receiving advertising mail, catalogs, and coupons at least monthly.

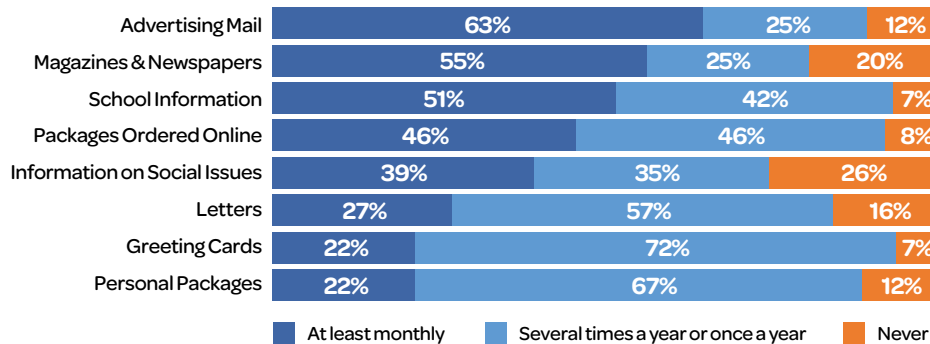
17 U.S. Postal Service, "Greetings from the North Pole Post Office," 2020, <https://about.usps.com/holidaynews/letters-from-santa.htm>.

18 U.S. Postal Service, *Wee Deliver: The In-School Postal Service. An Introductory Guide to the Postal Service's Wee Deliver In-School Literacy Program*, 1997, <https://files.eric.ed.gov/fulltext/ED448442.pdf>.

19 U.S. Postal Service, "Academic Outreach Developing an Action Plan for Our PCC," Postal Customer Council, September 23-27, 2019, <https://about.usps.com/what-we-are-doing/pcc-week/pdf/academic-outreach-2019-pcc-week-workshop.pdf>.

20 Bentley University, "Bentley Partners with U.S. Postal Service to Train the Next Generation of Direct Mail Marketers," September 4, 2018, <https://www.bentley.edu/news/bentley-partners-us-postal-service-train-next-generation-direct-mail-marketers>; Times Leader, "Collegians Gather at THINK Center for Marketing Challenge," April 6, 2019, <https://www.timesleader.com/news/739492/collegians-gather-at-think-center-for-marketing-challenge>; and U.S. Postal Service, "Career Opportunities: Students & Graduates," <https://about.usps.com/careers/career-opportunities/students-graduates.htm>.

Figure 3. Gen Z Reported Frequency of Receiving Mail and Packages



Note: Percentages may not total to 100 percent due to rounding.

Q: Generally speaking, how often do you personally receive the following items using the United States Postal Service (USPS)?

Source: USPS OIG 2019 Survey of Generation Z

We asked Gen Zers to rank their opening preferences, and half reported wanting to open packages first, before any other mail. About 21 percent of Gen Zers would open cards and letters first and 33 percent would open them second. School information such as grades emerged as a third preference. Advertising mail and retail catalogs were ranked much lower in opening preference. However, over half of Gen Zers did report that they enjoyed receiving mailed advertisements, including retail catalogs and coupons.

Strategies for Engagement:

The OIG found that 52 percent of Gen Zers reported that they enjoy receiving mailed advertisements. Future market research could be conducted to understand what type of advertising mail Gen Zers are observing in their homes (e.g. directly sent to a Gen Zer or their parent's mail) and which ones are resonating with them. Physical advertising mail can be an effective way to cut through digital media clutter that surrounds this age group. For instance, we found that 88 percent of the Gen Zers surveyed are receiving information mailed to them from schools at least several times a year. As Gen Zers transition into college and the workforce, with changing needs and wants, there could be additional opportunity to engage with them as young adults through mail.

Gen Z and the Value of Packages

When asked which organization delivers a majority of their packages, about 56 percent of Gen Zers said it was the Postal Service, while 28 percent said it was FedEx or UPS and 16 percent said they did not know. Packages are important to Gen Zers, half of whom want to open them first before mail, and they associate the Postal Service with their package delivery, more so than other delivery carriers. They are ordering items online, though the frequency is split with 46 percent of youth who are receiving these packages on at least a monthly basis and 46 percent who only order several times or once a year. As this generation transitions into adulthood, ecommerce and package delivery may become even more important for Gen Z.

Strategies for Engagement:

The Postal Service could build on Gen Zers' focus on packages. Their association of USPS with package delivery is an asset to its marketing, user experience, and product strategies. Previous OIG research has also suggested that receiving packages may be the new "mail moment" and there is great potential for this to be the case for Gen Z. Online orders have been driving the increase in packages that households have received in recent years, and Gen Z is currently transitioning into adulthood with greater buying power.²¹ It could be important for USPS to further explore and innovate the experience of receiving packages, such as with sensors, augmented reality, and other enhancements to make receiving packages more of an engaging experience.²²

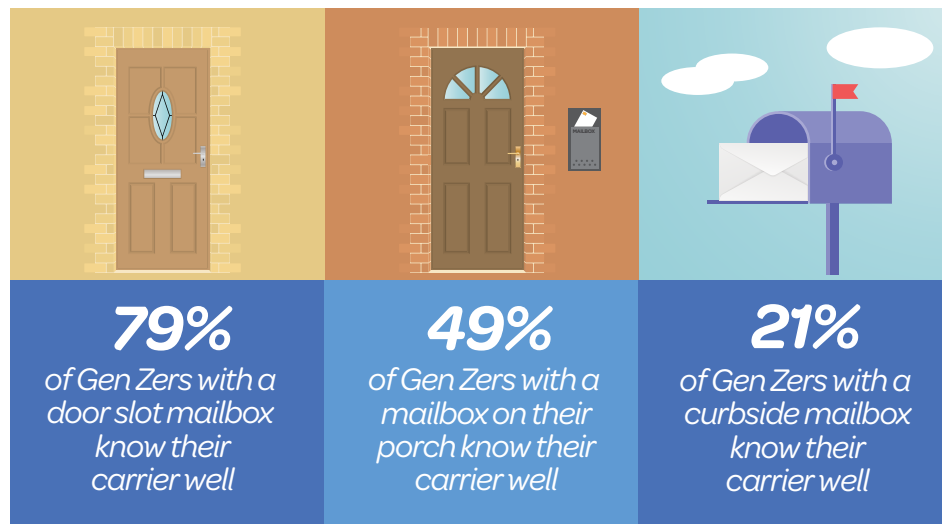
21 The 2019 USPS Household Diary Study indicates that the increase in packages households sent and received since 2017 is mostly due to additional online shopping. For more information, see U.S. Postal Service, *USPS Household Diary Study: Mail Use & Attitudes in FY 2019*, https://www.prc.gov/docs/113/113300/2019%20Household%20Diary%20Study_Final.pdf.

22 U.S. Postal Service Office of Inspector General, *Thinking Outside and Inside the Box*, Report Number RARC-WP-17-007, April 24, 2017, <https://www.uspsig.gov/sites/default/files/document-library-files/2017/RARC-WP-17-007.pdf>.

The Effect of Community on Gen Z Behavior

Where Gen Zers live can also shape their awareness of and engagement with mail, as it may influence proximity to the post office or where the mailbox is located.²³ One significant survey conclusion was that, compared to rural and suburban Gen Zers, urban Gen Zers were more likely to report knowing their mail carrier fairly or very well.²⁴ This may likely be the result of mailbox location as more urban youth have a door slot or porch mailbox compared to rural youth. Broadly, a higher percentage of youth who have a porch mailbox know their carrier fairly well compared to those with a curbside mailbox (see Figure 4).²⁵

Figure 4. Mailbox Location and Gen Z's Familiarity with Letter Carriers



Q: How well do you know the letter carrier who delivers mail regularly to your home?

Source: USPS OIG 2019 Survey of Generation Z.

These community differences may also influence engagement with the Postal Service and mail. The more familiar they are with their letter carrier, the more likely Gen Zers are to report a positive impression of the Postal Service. We also found significant differences in reports of post office visits by community type. Forty-eight percent of urban Gen Zers reported visiting a post office at least once a month, compared to 32 percent of suburban and 30 percent of rural Gen Zers. This result indicates that increased accessibility of post offices for Gen Zers could offer opportunities to foster a positive perception of the Postal Service.²⁶

Strategies for Engagement:

In a prior national study, the OIG found that consumers still value door and curb delivery, and access to post offices.²⁷ This study supplements this conclusion as Gen Zers are still visiting post offices, and those who have a door slot mailbox know their carrier better — which drives a positive perception of the Postal Service. As the Postal Service explores cost reduction strategies, it would be valuable to research and test what services are critical and valued by Gen Z, including their personal connection with a carrier or mailbox that may influence perception and satisfaction with the Postal Service.

²³ In the USPS OIG survey, parents of Gen Zers self-reported whether they and their Gen Zer live in an urban, suburban, or rural community.

²⁴ A prior OIG survey found that overall, rural customers were more likely to know the names of postal staff and go to the post office more frequently than non-rural customers. The rural survey focused on adults and had differently phrased questions from this Gen Z survey. Differences between the results from the prior rural survey and this Gen Z survey could potentially be explored further in future research. For more information, see U.S. Postal Service Office of Inspector General, *Addressing the Diverse Needs and Wants of Rural America: Opportunities for the Postal Service*, Report Number RISC-WP-19-009, September 16, 2019, <https://www.uspsaig.gov/sites/default/files/document-library-files/2019/RISC-WP-19-009.pdf>.

²⁵ Broadly, we found that there are significant differences in mailbox location by the community type. For example, 47 percent of urban youth have a mailbox on or near their porch, compared to about 15 percent of rural youth; and 64 percent of rural youth have a mailbox curbside, compared to 18 percent of urban youth.

²⁶ However, this did not appear to impact Gen Zers' parents and whether they said they bring their child with them to the post office — there was no difference in this activity among the urban, suburban, and rural parents of Gen Zers that we surveyed.

²⁷ U.S. Postal Service Office of Inspector General, *What Postal Services Do People Value Most? A Quantitative Survey of the Postal Universal Service Obligation*, Report Number RARC-WP-15-007, February 23, 2015, https://www.uspsaig.gov/sites/default/files/document-library-files/2015/rarc-wp-15-007_0.pdf.

The Role of Parents

Our survey data on the parents of Gen Zers support previous studies illustrating that parents often have a significant influence on their children's values and behaviors.²⁸ The OIG found a positive and significant association between how parents and Gen Zers perceive the Postal Service; a parent's positive impression informs their child's impression of USPS. However, parents more strongly agreed that USPS is an organization they trust, is socially responsible, and is relevant compared to their Gen Z child.²⁹ Gen Zers, though, likely have less experience with the Postal Service and using its products or services.

This survey result parallels a study in which Gen Z ranked USPS lower as a trusted brand compared to older generations that ranked USPS as the most trusted brand.³⁰ The Postal Service could benefit from the existing positive impressions of parents as a way to encourage mail use among younger Gen Zers. For additional information on how Gen Zers' parents engage with USPS and the mail, see [Appendix C](#).

Shared Mail Experiences Between Gen Zers and their Parents

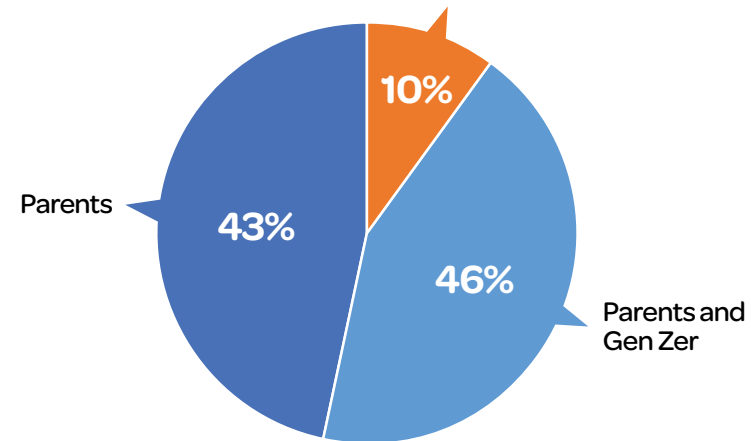
Activities that parents and their children do together are an important part of how youth learn new life skills and form opinions, whether it is a family camping trip or a visit to the post office. These shared experiences are crucial for passing along fundamental values and cultivating traditions. For instance, one parent surveyed responded, "I like send[ing] letters to maintain the tradition of tangible communication channels," which is a sentiment they may pass on to their children. Survey data on these shared experiences are significant because they suggest the Postal Service could reach Gen Z by engaging with parents as well.

Checking and Sorting Mail

Checking and sorting mail is one such shared experience. Nearly half of the youth surveyed said they share the responsibility of handling incoming mail with their parents; another 10 percent reported checking and sorting the mail by

themselves (see Figure 5). Given that a majority of Gen Zers are bringing in the mail for their households and sorting it with their parents or alone, there is an opportunity for the Postal Service and external stakeholders to look further into Gen Z's experience as mail handlers. This could include exploring what types of mail resonates with Gen Zers or captures their attention, such as advertising mail directed towards them.

Figure 5. Who Checks and Sorts Mail in Households with Gen Z



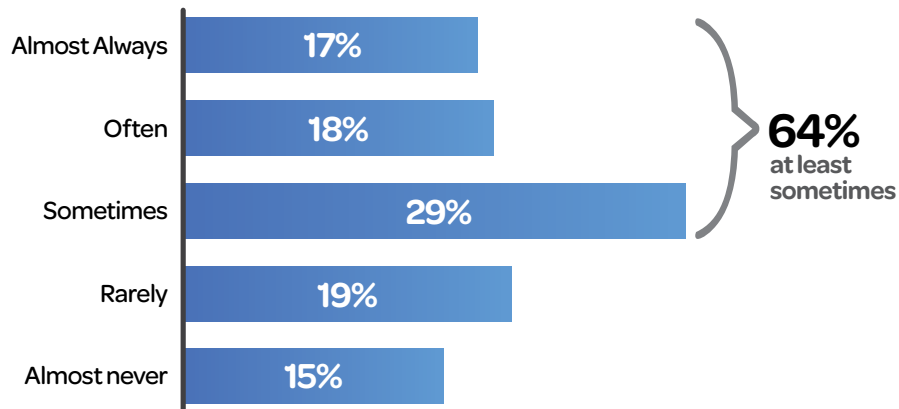
Note: Other responses included "Someone else" and "I don't know" (1%).
Q: Who checks the mailbox and sorts the mail at your house?
Source: USPS OIG 2019 Survey of Generation Z

Visiting the Post Office

The majority of parents reported bringing their children with them to the post office which gives youth practical exposure to the products and services the Postal Service offers. For instance, 61 percent of parents indicated they visit a post office at least once a month, and 64 percent at least sometimes bring their children with them (see [Figure 6](#)).

28 Jodi Dworkin and Joyce Serido, "Social & Emotional Learning: The Role of Families in Supporting Social and Emotional Learning," *University of Minnesota Extension Youth Development Issue Brief*, (February 2017), <https://conservancy.umn.edu/bitstream/handle/11299/195183/issue-brief-role-of-families-in-supporting-sel.pdf>; Joan E. Grusec, et al., "New Directions in Analysis of Parenting Contributions to Child's Acquisition of Values," *Child Development*, 71, No. 1, (February 2000), <https://onlinelibrary.wiley.com/doi/abs/10.1111/1467-8624.00135>.
29 Parents reported on a scale where 1=strongly disagree and 5=strongly agree that they agreed more strongly compared to their Gen Z child that the post office is an organization they trust (*Parent mean*= 4.34, *Child mean*= 4.19, $p = .001$); is socially responsible (*Parent mean* = 4.08, *Child mean* = 3.92, $p = .001$); and is relevant (*Parent mean* = 4.33, *Child mean* = 4.01, $p = .001$).
30 Morning Consult, "Most Trusted Brands 2020," 2020, <https://morningconsult.com/most-trusted-brands/>.

Figure 6. How Often Parents Bring Their Children with Them to the Post Office



Note: Other response included "I don't visit the post office" (2%).

Q: When you do visit the post office, how often do you bring your children with you?

Source: USPS OIG 2019 Survey of Generation Z

Nearly three-quarters of parents the OIG surveyed reported going inside a post office to send their packages, and more than half go inside to send greeting cards or letters. By seeing their parents buy postage stamps or prepare packages for shipment at the post office, mail engagement becomes a part of life and Gen Zers gain awareness and knowledge of how to mail.

Strategies for Engagement:

The OIG looked at what other foreign posts are doing to engage younger consumers in order to explore strategies or innovative products and services that the Postal Service could apply to its own retail space. For instance, a number of posts implemented recruitment and apprenticeship programs geared towards attracting older Gen Zers to work at the post.³¹ Swiss Post has also created a networking group within their recruitment program called "Young Voice" in order to better understand this age group as consumers and reflect their insights into postal products.³² Others are modernizing retail space to make post offices more attractive and relevant to youth, including tablet bars, written driver's license testing, and banking offers and free printing services targeted at students.³³ Finally, Australia Post also launched a marketing campaign to build awareness of its "youth-related" products and services that help 14 to 24 year-olds transition into adulthood, including photo identity cards and financial products such as secure prepaid bank cards.³⁴

An opportunity exists for the Postal Service to create an atmosphere in its retail space that encourages Gen Z to visit the post office with their parents, and later on their own. This could include marketing strategies implemented by non-postal brick and mortar stores, such as youth-oriented games or keepsake toys with which children could engage at the post office or take away with them after a visit.³⁵ Another example would be to offer a USPS passport, which would allow families to collect featured postage stamps and postmarks by visiting their local post office. The passport could include background information on USPS and how to mail, which could promote a dialogue between families and postal employees, and provide Gen Zers with a souvenir.

31 CTT – Correios de Portugal, S.A., *Integrated Report 2018*, 2019, <https://www.ipc.be/-/media/documents/public/annual-reports/member-reports/2019/ctt-portugal-post-2018.pdf>; Royal Mail Group Limited, "Early Careers," 2020, <https://jobs.royalmailgroup.com/content/Early-Careers/>; and Australia Post, "Creating a Future-Ready Workforce at Australia Post," September 2, 2019, <https://auspostenterprise.com.au/insights/working-differently/creating-future-ready-workforce-australia-post>.

32 Sandra Gonseth, "How Young People are Changing the World," Swiss Post Ltd., February 20, 2020, <https://www.post.ch/en/about-us/news/2020/how-young-people-are-changing-the-world>.

33 Le Groupe La Poste, *Registration Document 2018: Annual Financial Report*, March 15, 2019, https://le-groupe-laposte.cdn.prismic.io/le-groupe-laposte%2F120e73e9-13a6-4268-b206-0610c867dab0_2018-registration-document-le-groupe-la-poste.pdf; Le Groupe La Poste, *Make Easier and Change: 2018 Business Report*, https://le-groupe-laposte.cdn.prismic.io/le-groupe-laposte%2Fbfe69ba4-efbc-498a-a09b-1bb17d690765_2018-business-report-en.pdf; and Österreichische Post, Products and Services, <https://www.post.at/p/c/filialen-produkte#898618930>.

34 Australia Post, *Annual Report 2014: Your Post is Evolving*, 2014, https://auspost.com.au/content/dam/auspost_corp/media/documents/Australia_Post_Annual_Report_2013-14.pdf.

35 Robert Klara, "The Happy Meal Ranks Among the Most Successful—and Copied—Ideas," *AdWeek*, December 9, 2019, <https://www.adweek.com/brand-marketing/the-happy-meal-ranks-among-the-most-successful-and-copied-ideas/>; Tom Ryan, "Giant Thinks AR-games are Ripe for Grocery Aisles," *Retail Wire*, December 23, 2019, <https://retailwire.com/discussion/giant-thinks-ar-games-are-ripe-for-grocery-aisles/>; Tom Ryan, "Why is Trader Joe's Hiding Stuffed Animals in its Stores?" *Retail Wire*, November 11, 2019, <https://retailwire.com/discussion/why-is-trader-joes-hiding-stuffed-animals-in-its-stores/>; and Albertsons Company, Inc., "Shop, Play, Win! Monopoly," Safeway, <https://www.safeway.com/shop/lp/monopoly.html>.

Teaching the Value of Mail

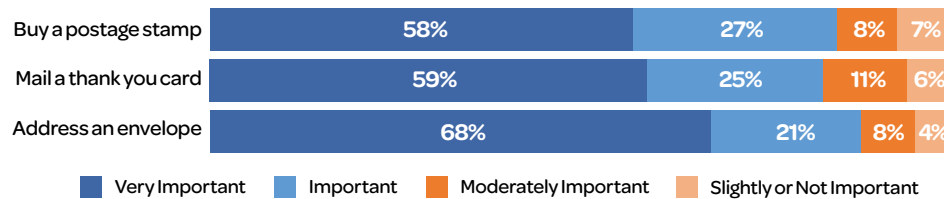
The OIG found that parents who expressed feeling happy or excited when their children receive mail and packages are more likely to value their child's ability to manage postal skills, such as knowing how to address an envelope, buy a postage stamp, and mail a thank you card. Parents have a positive impact on Gen Zers' learning about how to mail as a useful life skill.

The overwhelming majority of parents surveyed believe it is either important or very important that their child know how to buy a postage stamp, mail a thank you card, and address an envelope (see Figure 7). We also found that parents' belief in the importance of the skill of addressing an envelope was positively associated with children's confidence in being able to do that task.

"My mom says it's more personal and heartfelt to hand write a note to someone you care about."

- Gen Z survey respondent

Figure 7. The Importance Parents Place on Their Child's Postal Knowledge



Note: Percentages may not total to 100 percent due to rounding.

Q: How important is it that your children know how to ...

Source: USPS OIG 2019 Survey of Generation Z

Age and generational differences emerged when the OIG looked at the importance parents place on teaching their Gen Z children how to mail. Parents of older children placed greater importance on their child knowing how to address an envelope and buy a stamp. In addition, older parents placed more emphasis on value of mail. For instance, Baby Boomer parents surveyed were more likely to consider it important that their child know how to mail a thank you card as compared to both Millennial and Gen X parents.

Strategies for Engagement:

The Postal Service could consider implementing additional partnerships with stakeholders to enhance or develop outreach and education programs focused on improving Gen Z's postal skills. These programs could provide parents who value mail with an avenue where they can bring their children to learn in an engaging environment. Because some parents may be less engaged with mail, the Postal Service could work with educators to develop outreach strategies to build fundamental writing skills and mail fluency simultaneously. Some of these programs may also be well situated to be adapted virtually. A few examples of existing programs that could appeal to Gen Zers are:

- The annual "Thinking of You" campaign, a collaboration between the Postal Service and the Greeting Card Association, could be an opportunity for USPS to work with educators in order to engage parents and their Gen Z children through card writing workshops.³⁶
- The Postal Service's partnership with Scholastic and Hallmark to promote letter writing in the annual "Show Someone You Care" initiative provides a remote learning packet that includes a letter template for parents to work on with their kids at home.³⁷

cont'd ►

³⁶ Thinking of You Week, "Thinking of You Week is About the Personal Touch," <https://www.thinkingofyouweekusa.com/about/>; and Nicky Burton, "Smithsonian Postal Museum Event," *Thinking of You Week*, September 19, 2019, <https://www.thinkingofyouweekusa.com/smithsonian-postal-museum-event/>.

³⁷ In 2020, "Show Someone You Care" lessons are geared toward remote learning to support teachers, parents, and students at home during the Coronavirus pandemic. For more information on the "Show Someone You Care" initiative, see U.S. Postal Service, "Home School Help: Delivering the Art of the Letter. Kids Learn the Value of Pen and Paper Communication," *USPS News*, May 19, 2020, <https://about.usps.com/newsroom/local-releases/ca/2020/0519-home-school-help-delivering-the-art-of-the-letter.htm>; Scholastic, "Letter-Writing Activities for Families," 2020, http://www.scholastic.com/letterwriting/pdfs/USPS_RemoteLearning_Family_Packet.pdf; and Scholastic, "Show Someone You Care," 2020, <http://www.scholastic.com/letterwriting/index.html>.

cont'd ►

- The Postal Service's partnership with Nickelodeon for its "SpongeBob Mailpants" program, which used postage-paid, customized postcards to teach children how to write and mail letters, was also a solid step in the right direction. One Postal Service representative told the OIG that parents were purposely involved in this effort, providing them an active role to engage their children with mail, but also said that designing initiatives that directly engage youth can be difficult.³⁸ The Postal Service could also repurpose this program or a similar one with different characters that appeal to Gen Z in schools.
- In addition, a new potential way to target parents would be a pop-up letter writing station. The Postal Service could establish or leverage existing partnerships to offer a creative and accessible environment in which children can practice writing their thoughts and feelings. These temporary social events could be held in locations where parents may already go with their children, such as the local post offices, or the Postal Service could partner with a museum, school, or local business to hold the event. A supply of pens, notecards, and envelopes, as well as information about postal products and services, would further engage parents and their Gen Z children.

The Role of Mail Alongside Technologies

Ninety-two percent of Gen Zers reported owning a cell phone, and the majority of those (53 percent) got their first cell phone by age 12. Despite the presence of technology in their lives, our survey found that Gen Zers prefer communicating via mail in certain contexts, such as sharing congratulations. Mail still has a place alongside technology to fulfill the varying communication needs of Gen Zers.



Source: Qualitative responses to a question about a close interaction with a family member (e.g., online, in-person, via mail), from USPS OIG 2019 Survey of Generation Z.

Communication Preferences of Gen Z

The OIG asked Gen Zers to report their most preferred communication method across eight diverse scenarios for their parent and three additional family members.³⁹ Our survey data corroborated existing research that found people are intentional in their communication methods, depending on the relationship they have with the person.⁴⁰ Gen Zers also indicated that content and speed may shape their decision-making and, despite digital communication alternatives, Gen Zers value mail as a method to communicate with family in two scenarios: sending wishes or congratulations and to make the recipient feel special (see Table 1).⁴¹

38 Jenny Xie, "The USPS Tries to Get Kids Writing Letters with a SpongeBob SquarePants Mailbox," *Bloomberg City Lab*, December 9, 2013, <https://www.citylab.com/design/2013/12/usps-tries-get-kids-writing-letters-spongebob-squarepants-mailbox/7823/>.

39 In the OIG survey, Gen Zers were asked to identify their parent and up to three additional family members with whom the Gen Zer most frequently communicates and does not live in the same house. Gen Zers then confirmed the age and role of each of these additional family members (e.g., grandparent, aunt, or cousin). Afterward, Gen Zers were asked how frequently they communicate with their parent and each of the other family members using eight different communication methods and in eight different scenarios.

40 Em Griffin, Andrew Ledbetter and Glenn Sparks, "Chapter 13 – Media Multiplexity Theory," in *A First Look at Communication Theory*, (McGraw-Hill Education, 2019), 117-128, <https://www.afirstlook.com/edition-10/theory-resources/by-type/outline/Media-Multiplexity-Theory>.

41 In the OIG survey, Gen Zers indicated their preferred communication method in eight scenarios (i.e., selected one method per scenario). The other four scenarios not listed are "catch up with them in real time," "receive or offer advice and recommendations," "inform them about changes in my life," and "make plans." In each of these four other scenarios, three percent of Gen Zers preferred to communicate using cards, letters, and postcards.

Table 1. Gen Z's Most Preferred Method for Communication with Family by Scenario†

Communication Method	Send wishes or congratulations	Make them feel special or "I'm thinking of you"	Receive or offer emotional support	Keep up to date
In-person	31%	31%	50%	39%
Cards, Letters, and Postcards	18%	13%	5%	4%
Texts	16%	18%	11%	18%
Phone Calls	13%	15%	17%	21%
Packages	7%	5%	3%	4%
Social Media	4%	5%	1%	4%
Online Video Chat	3%	4%	3%	3%
Emails	2%	2%	2%	3%

† Approximately 4.8 to 9.4 percent of respondents selected "I don't do this" for a given communication scenario.

Q: When communicating with [family member], which method would you choose to [insert social scenario]?

Source: USPS OIG 2019 Survey of Generation Z

We found that Gen Zers overwhelmingly preferred in-person communication, which allows for non-verbal communication as well. Half of all Gen Zers preferred to receive or offer emotional support in person, which allows for physical connection and additional perception of emotions, such as eye contact, that may be lost in some communication methods. Only five percent of Gen Zers preferred communicating by mail in this scenario. Mail, however, did emerge as one preferred method when Gen Zers want to convey positive sentiments such as congratulations (18 percent) and that they are thinking about the recipient (13 percent). The survey results suggest Gen Zers choose mail to share a meaningful sentiment.

In their qualitative responses, Gen Zers indicated they sometimes intentionally avoid technology. For example, a Gen Zer explained that "sometimes I just want a break from texting people." Nearly one in four Gen Zers (23 percent) reported avoiding technology frequently or very frequently because it distracts them from really connecting with others. Alternatively, Gen Zers shared that taking the time to prepare mail and develop a message in a unique, physical format, such as a card, conveys care and a deep connection that may not be found in technology. An act such as handwriting and the effort it requires also communicates emotions and value more akin to the tangible in-person communication, for instance.

"[Using mail] is better than always using technology, [because] it gets old and boring sometimes."

- Gen Z survey respondent

"I send things in the mailbox to make people know they are special to me."

"I like to get [letters, cards, and packages] so I try to send them."

"I like knowing they will be happy to get a letter from me."

Source: Qualitative responses to questions about why a Gen Zer may send mail over technology or why they like to use mail, from USPS OIG 2019 Survey of Generation Z

Communicating with Different Generations

Gen Zers' intentional approach to communication extends to how they communicate with younger and older family members. For example, in the OIG's qualitative survey data, a Gen Zer shared one reason they communicate using mail is because their grandparents do not have a cell phone. Whereas with younger family members, responses illustrated that social media, online video chat, and text were common.⁴² The OIG surveyed how frequently they used each communication method, and Gen Zers reported most often communicating in person with family members of all ages, underscoring the importance of in-person engagement. Gen Zers also indicated they use mail to communicate with younger and older family members at the same rate, though Gen Zers reported using mail far less often than in-person communication overall.

"I call to talk to [my grandparents] every week or two and my grandpa who is 80 just figured out how to text on his phone so I do text him occasionally. But I prefer to see them in person."
- Gen Z survey respondent

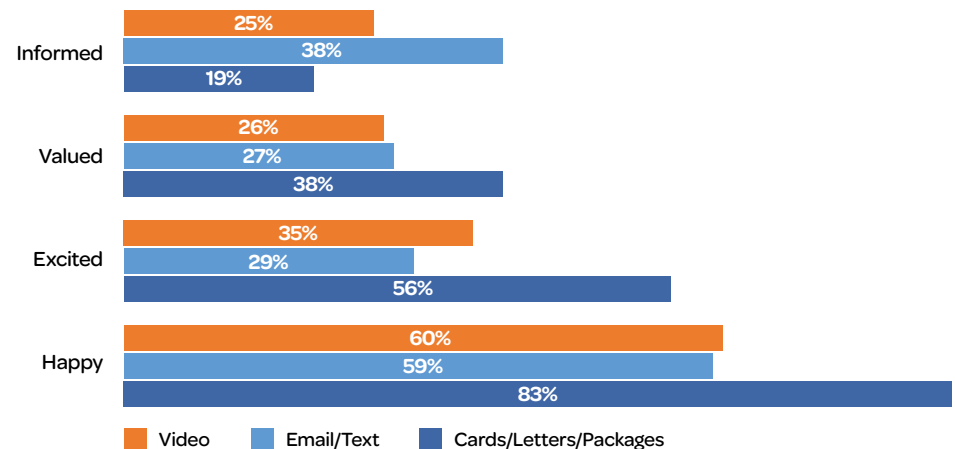
Strategies for Engagement:

The OIG found Gen Zers like to use greeting cards outside of special occasions, such as wanting to express they are "thinking of someone" or to make someone feel special. A greeting card industry stakeholder told us that their internal data indicated young people including Gen Zers are buying greeting cards that appear in the mail "just because," which create unexpected experiences that surprise and delight recipients. As Gen Zers age, expand their social circles, and may buy more greeting cards, stakeholders could explore this potential trend. For instance, tailored products such as "just because" greeting cards or shipping materials that match the colloquialism and interests that Gen Zers would like to share could be appealing. Gen Zers could also customize the message and style of these products digitally to match the latest novelty and their tastes prior to mailing, for instance. Previous OIG research also suggested USPS could help promote more innovative parcel packaging, such as more creative designs or even integrated technologies.⁴³ Such innovations could appeal to Gen Zers.

How Gen Zers Feel Using Mail and Technology

Gen Zers may prefer to send mail to communicate positive sentiments because they enjoy receiving mail and recognize that it elicits positive emotions, such as happiness and excitement. The OIG found that most Gen Zers shared they feel happy (83 percent) when mail arrives in their mailbox (see Figure 8), while approximately 60 percent are happy using technology such as video chatting. In addition, a majority of Gen Zers are excited to receive mail (56 percent), compared to a smaller percentage (29 percent) who are excited about using technology, such as email or text. Gen Zers, therefore, likely feel that letters and cards can build emotional connections with family and friends.

Figure 8. How Gen Zers Feel Using Different Communication Methods with Family



Q: Which of these terms describe how you feel when you talk with your family (A) using video chatting; (B) using email or text; (C) receiving mail?

Source: USPS OIG 2019 Survey of Generation Z

When discussing mail in their qualitative responses, Gen Zers and their parents used words such as "special" and "meaningful." As Gen Zers reported that receiving letters makes them feel special (see Figure 9), many Gen Zers recognized that writing letters can make the recipient feel happy or special. Some Gen Zers also suggested that the act of mailing conveyed feelings of love and care through the effort it took to personalize and send a card. Stakeholders,

⁴² The OIG compared how frequently Gen Zers communicated with younger compared to older family members using the following communication methods: in-person; cards, letters, and postcards; packages; phone calls; emails; texts; social media; and online video chat.

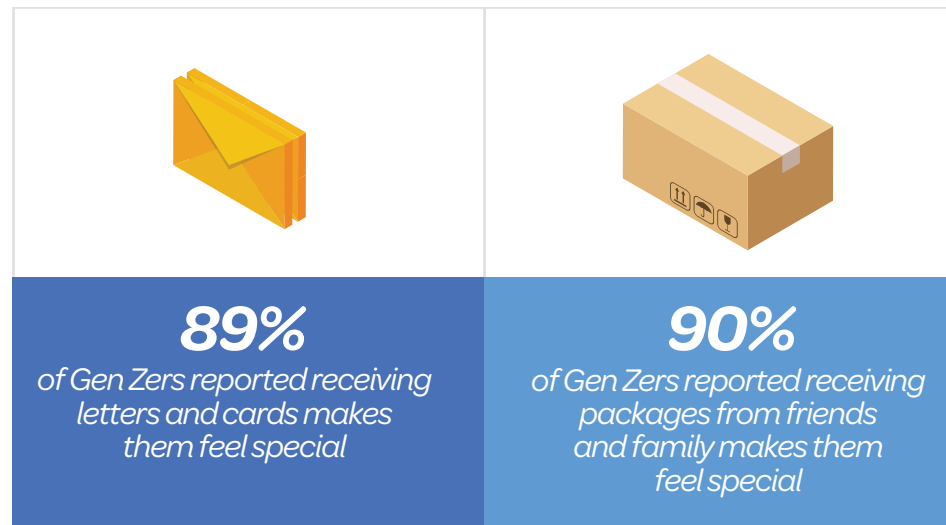
⁴³ U.S. Postal Service Office of Inspector General, *Thinking Outside and Inside the Box*.

such as advertisers and mailers, could further explore how mail can elicit positive emotions from Gen Zers and increase their engagement with their mailbox.

"I think it's more special to send something to [my friends] through the mail occasionally. It shows I took the time to pick out a special card or wrote a note to make them feel like they are worthy of more than a two second text."

- Gen Z survey respondent

Figure 9. Gen Zers Feel Special When Receiving Mail and Packages



Q: How much do you agree or disagree that (A) receiving letters and greeting cards from friends and family makes me feel special; (B) receiving packages from friends and family makes me feel special?
Source: USPS OIG 2019 Survey of Generation Z

Strategies for Engagement:

Today more than ever, effective marketing and communication means mitigating advertising clutter and fatigue to get the message across. The positive emotions Gen Zers associate with mail illustrate its viability as a channel for organizations to break through the noise. Through its Informed Visibility and Informed Delivery initiatives, the Postal Service has worked to encourage advertisers to incorporate mail into integrated, omnichannel campaigns. The Postal Service could continue to promote mail's value in omnichannel campaigns by educating advertisers, non-profits, and other current or potential mailers about mail's strong emotional connection with Gen Zers. Such efforts could include identifying the best venues to share information on mail's effectiveness with decision makers, including at key industry conferences where there is an audience of potential mailers.

Insights and Actionable Future Research

The OIG's research highlights potential areas for future study. Actionable research areas that the Postal Service could focus on include the endurance of mail behavior as Gen Z transitions into adulthood and the complementary role of technology and mail engagement.

The Endurance of Mail Behavior

- **Conduct ongoing research into Gen Z behavior.** The OIG's survey results provide a snapshot in time of youth behavior and preferences. As noted earlier, the Postal Service has yet to collect data on behavior and engagement with mail of Gen Zers under the age of 18. The importance of ongoing surveys of Gen Z is to understand if and how their behavior is carried into adulthood as consumers. How does Gen Z's early education and confidence in postal skills, like addressing an envelope, impact their engagement with mail in adulthood, such as the likelihood of sending in a voting ballot or responding to ad mail? Are there specific shared parent-child experiences that significantly affect Gen Z's mail behavior and habits in adulthood? Alongside longitudinal surveys,

data from quasi-experimental designs or other similar tests can demonstrate in what ways Postal Service education and outreach programs with partners have been successful in affecting youth behavior or impressions of USPS.

- *Concept test products and innovations with Gen Z.* Qualitative data from the OIG survey found that Gen Zers would like to see the Postal Service modernize its services, such as with self-service kiosks and digital means of paying for postage, and are seeking greater convenience through pre-paid options and appointments at retail locations. Concept testing these products and services with older Gen Zers would test the feasibility and evaluate Gen Zers' potential use at a pivotal time when they become adults.
- *Focus on the impact of Gen Z's life milestones on mail usage.* Older Gen Zers are now entering a stage of their lives where they are achieving many milestones such as going to college, starting a full-time job, getting married, or having a child. Each of these milestones can significantly shape Gen Zers' preferences and habits, including their needs and purchase of products and services. For instance, the OIG found that Millennials who had a child were more likely to send and enjoy mail.⁴⁴ Ongoing surveys during their transition to adulthood would be useful to capture Gen Zers' enduring and changing preferences to understand the key drivers of their engagement with mail during different life stages.
- *Examine the influence of the pandemic on Gen Z's use of the Postal Service.* Additionally, for Gen Zers today, the coronavirus pandemic in the United States has significantly impacted the labor market and how people are able to connect with one another and businesses. The effect of the pandemic is particularly salient for older Gen Zers who are transitioning into college or the workforce. Preferences for services and products may have shifted during the pandemic, and some changes may become fixed. Data collection during and after the pandemic would provide insights into temporary and lasting behavioral changes during a critical time for young people.

Technology and Mail Engagement

- *Compare Gen Z with prior generations.* The OIG's research found that today's youth perceive mail as meaningful and valued as a form of communication. More Gen Zers associated happiness with mail than with digital communications. Do Gen Zers' perceptions of mail and technology reflect a broader societal shift in the value of mail? Comparisons of generations and age groups are most useful in understanding societal changes, like the USPS Household Diary Study and Mail Moments. Further studies analyzing mail and digital needs and wants of Generation Z with previous generations will provide prospective information to strategize about how people of different ages may use mail alongside technology products and services.
- *Evaluate the right context for reaching Gen Z using mail.* Future research could examine how Gen Z's preferences for mail in certain contexts align with different marketing communications and where mail could best fit into an omnichannel approach. What types of products or organizations are best suited to harness mail for creating a meaningful, emotional connection with customers, and where mail is a cost-effective channel? For instance, studies could test where in the marketing funnel the unique qualities of mail would be most needed, such as generating initial awareness of an organization or retargeting past consumers. Additional research to explore how Gen Z's communication preferences vary or remain the same by social context would provide integral insights into future marketing efforts and strategies.
- *Continue research on mail as a complement to digital alternatives.* Additional qualitative data on the complementary role of mail and technology, such as through focus groups, could build upon the OIG's initial quantitative data on the scenarios where Gen Zers decide to communicate using letters and cards instead of technology. What are the specific factors that influence Gen Zers to purchase a card instead of starting a video chat to connect with a friend or family member? Additional research to explore how Gen Z's communication preferences vary or remain the same by social context would provide integral insights into future Postal Service efforts and strategies to understand where else technology can build upon the mail moment for Gen Z.

⁴⁴ U.S. Postal Service Office of Inspector General, *Millennials and the Mail*.

Conclusion

Despite headlines about Gen Z and their unbreakable connection to digital communication, the OIG found that Gen Zers do value and use mail. However, context matters, and Gen Zers send mail such as greeting cards and letters intentionally, with a specific purpose and person in mind. Gen Zers associate mail with happiness and excitement, and recognize that mailing a card, for example, means taking the extra effort to make their family and friends feel special. Further, parents have an influential role in sharing this unique value of cards and letters with their children, and in providing opportunities for Gen Z to actively engage

with mail and post offices. Packages appear to be of interest to Gen Zers because half prefer to open them before any type of mail. Moreover, half of Gen Zers reported liking mailed advertisements, which may be unique from the usual digital channels they use. Mail continues to resonate with a digitally connected generation, especially for its emotional connection. To continue to foster positive engagement with mail, it could be valuable to build on the OIG's results with future studies of Gen Z and how their behaviors and preferences are carried into adulthood.

Appendices

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Appendix A: Additional Information

Objectives, Scope, and Methodology

This white paper builds on the U.S. Postal Service Office of Inspector General's (OIG) "Millennials and the Mail" paper by focusing on the subsequent generational cohort Generation Z (Gen Z), defined as those individuals born between 1997 and 2012. Our current study extends the body of research examining young people's behavior and engagement with mail and the U.S. Postal Service.

The research was guided by four questions:

1. In what ways are Gen Z and their families engaging with mail for communication and social relationship purposes?
2. What are important considerations for Gen Z and their families as they choose which communication method to use?
3. In what ways are Gen Z and their families engaging with the Postal Service, including with local post offices?
4. Based on the answers to these questions above, what are key factors and attributes of Gen Z and families that the Postal Service could consider in its future planning and strategy development?

The OIG's research approach followed a multi-step methodology to increase our understanding of how Gen Z youth utilize and view the Postal Service versus other communication methods:

1. *Fielding a survey of Gen Z and their parents.* The OIG worked with a research lab at the University of Minnesota to develop a quantitative and qualitative survey to examine the Gen Z cohort's engagement with mail and the Postal Service; how they use various communication methods; and the influence of the family on postal knowledge and engagement. The sample age range was limited to Gen Z who were at least 13 years old because the respondent would likely be developmentally ready to answer the survey

independently. The survey was fielded in November and December 2019 and resulted in a final sample of 403 Gen Zers paired with one parent for a total of 806 individual respondents. To ensure the sample reflected the demographics of the U.S. population, the OIG set targets for age, race, ethnicity, gender, geographical area, and income when monitoring recruitment of respondents. We then compared the sample against Census Bureau data. A full description of the survey methodology from University of Minnesota is contained in [Appendix B](#).

For analyses of the survey results, the OIG conducted statistical tests as appropriate, including Pearson Correlation tests, t-tests, and chi-squared tests. All reported statistical results have p-values that are statistically significant at the 95 percent level.

2. *Interviewing Postal Service management and external stakeholders.* The OIG interviewed postal management about strategies, initiatives, and data collection efforts that the Postal Service has implemented or plans to conduct as related to Generation Z and youth. We reviewed relevant USPS documents and reports. We additionally interviewed external stakeholders to explore what research they have conducted on the Gen Z cohort.
3. *Conducting secondary research.* In order to gain a broader understanding of the Gen Z cohort, including how USPS can best engage with this generation, the OIG reviewed existing published reports and data. These ranged from documents that summarized demographic trends of Gen Z, market research, and data from the Census Bureau.

The OIG conducted work for this white paper in accordance with the Council of the Inspectors General on Integrity and Efficiency, Quality Standards for Inspection and Evaluation. We discussed our observations and conclusions with management on August 19, 2020, and included their comments where appropriate.

Prior Coverage

Report Title	Objective	Report Number	Final Report Date	Monetary Impact
<i>Millennials and the Mail</i>	To provide a comprehensive view of how Millennials, defined in this paper as adults aged 18 to 34, engage with the Postal Service.	RARC-WP-18-011	July 30, 2018	N/A
<i>A New Reality: Correspondence Mail in the Digital Age</i>	To understand the underlying trends affecting First-Class Mail volume, including how consumer age differences impacted the growth and decline of correspondence mail.	RARC-WP-18-004	March 5, 2018	N/A
<i>The Postal Service Customers of the Future</i>	To understand the needs and expectations of future customers of USPS, and how USPS could effectively meet those changing needs.	RARC-WP-14-014	September 29, 2014	N/A
<i>Like, Share, Tweet: Social Media and the Postal Service</i>	To examine the social media environment in which the Postal Service operates and provide suggestions on how it could increase the effectiveness of its social media strategy.	RARC-WP-14-010	April 21, 2014	N/A
<i>Enhancing Mail for Digital Natives</i>	To understand digital natives' current uses and perceptions of physical mail.	RARC-WP-14-001	November 18, 2013	N/A

Appendix B: University of Minnesota's Survey Methodology

The University of Minnesota research team collected both quantitative and qualitative data from one parent and one Generation Z child (13-18 years old) in the same family using a 20-minute online survey administered via Qualtrics, an online survey tool available through the University of Minnesota. The University of Minnesota research team completed data collection on December 9, 2019, and the final sample was 403 families (806 individuals).

Recruitment

Researchers engaged the services of Qualtrics for recruitment of parent participants, who nominated one of their children to be invited to complete a child survey. Qualtrics managed the recruitment process through the aggregation of over twenty market research panels, in which potential respondents were randomly selected to receive an invitation to participate. In this process, certain exclusions took place, including participation frequency (i.e., avoiding oversampling participants) and researcher requirements (e.g., parents with a child between the ages of 13-18). Only potential respondents who were highly likely to qualify (in this case, be the parent of a 13-18 year-old) were invited to participate in this study. Panels were selected to represent the general population as closely as possible (some harder to reach minority groups are intentionally overrepresented) and then randomized before the survey was deployed.

Potential parent respondents were sent an email invitation informing them that the survey was for research purposes only, how long the survey was expected to take, and what incentives were available. Survey contents were not divulged until the consent/assent process in order to minimize self-selection bias.

Parent participants were asked to identify their youngest Gen Z child to complete the child survey. The OIG focused on the youngest child aged 13-18 in order to increase the age range of youth participants, as well as temper any bias toward parents nominating older children. The child age range was selected to include early teens through the transition to college.

Consent Process

Parents who agreed to participate were required to first provide consent. They then completed the survey one time, were invited to enter the email address of their youngest 13-to-18-year-old child and provide consent for their child to participate in the study as well. Once the parent completed the survey, an email invitation with a link to the child survey was automatically emailed to the potential child participant. If the child chose to participate, they were also required to provide assent (ages 13-17) or consent (age 18), and then completed a child version of the survey one time.

Target Recruitment and Mitigation of Sampling Bias

The following steps were taken to minimize sampling bias and to generate a representative sample of participants. Qualtrics ensured that survey participants were not oversampled by maintaining records of participation history and limiting the number of survey invitations each person receives. In addition, once data were collected from 50 parents, 250 parents, 400 parents, and then every 150 parents afterwards, the research team reviewed the data in collaboration with the Qualtrics project manager to do an evaluation of the data for quality assurance. This process included assessing participants with survey completion times less than one-half the median rate, looking for patterns that would indicate inattention, and nonsensical responses to open-ended questions. We also sent follow-up emails to children as reminders to encourage participation. Members of the research team regularly monitored incoming data during data collection to ensure high quality results and a consistent stream of diverse participants based on the following target demographics:

- 50% of Gen Zers in early adolescence
- 50% of Gen Zers female
- Annual household income trending toward a normal distribution (e.g. a bell curve)

In addition, Qualtrics used a system of “quotas” to ensure that responses matched the target demographics, which included over-recruitment of certain groups. Table 2 outlines the demographics of the final sample.

Table 2. Demographics of the Final Survey Sample

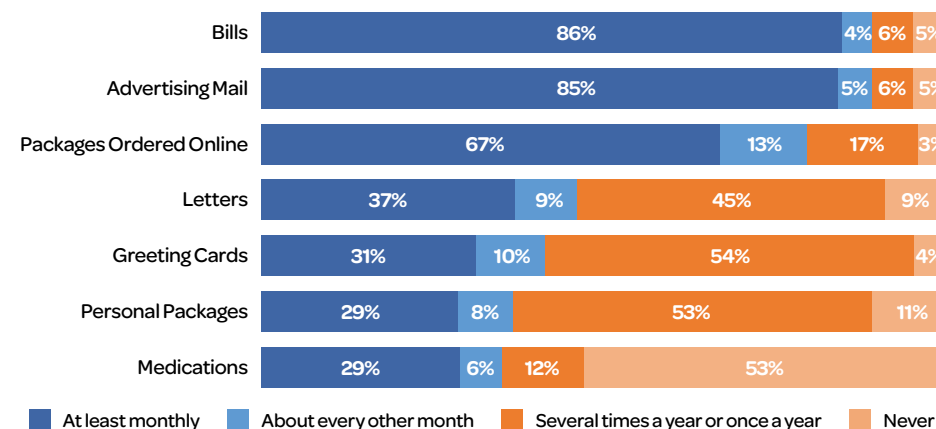
Category	Final Sample (n=403 families; 806 individuals)
Age of Gen Z respondents	31.3% 13 or 14 years old 41.2% 15 or 16 years old 27.6% 17 or 18 years old
Age of Parent respondents	19.2% 26 to 35 years old 46.2% 36 to 45 years old 24.7% 46 to 55 years old 10.0% 56 to 76 years old
Race of Gen Z respondents	65.7% white 20.9% black/African American 3.7% Asian 15.9% Latina/o
Parent-Child Dyad Gender	62.0% mothers 48.4% daughters
Rurality	28.9% rural 31.5% suburban 39.6% urban
Annual household income	26.3% less than \$34,999 14.9% \$35,000-\$49,999 23.8% \$50,000-\$74,999 16.6% \$75,000-\$99,999 16.4% \$100,000 or more

Appendix C: Parents of Generation Z's Engagement with USPS and Mail

The OIG surveyed Gen Zers' parents about their familiarity with USPS products and services, and their engagement with different types of mail. This information provides additional context to family and household factors that might influence their Gen Z children's mail engagement. When the OIG asked parents which USPS products and services they are familiar with, most were aware of services like tracking notifications via text, email or the mobile app (78 percent), and money orders (74 percent). In comparison, 43 percent of parents were at least familiar with Informed Delivery and 46 percent with self-service kiosks, suggesting there are certain services that the Postal Service could focus on marketing to increase awareness with Gen Zers' parents.

Parents reported using letters, cards, and packages to correspond with friends and family. They sent mail and packages more frequently than their Gen Z children. Approximately three-quarters of parents said they send greeting cards and postcards at least several times a year. In addition, while the proportion of bills paid by mail has continued to go down over the last decade, the OIG found that 59 percent of parents are using USPS to mail at least one bill payment at least once a month.⁴⁵ Nearly all parents reported receiving greeting cards or postcards at least once a year or more. For other household needs, almost half of parents said they receive medications in the mail at least once a year or more, and 29 percent rely on this service at least monthly (see Figure 10).

Figure 10. How Often Gen Z Households Receive Mail Using USPS



Note: Percentages may not total to 100 percent due to rounding.

Q: Generally speaking, how often does your household receive the following items using the United States Postal Service (USPS)?

Source: USPS OIG 2019 Survey of Generation Z

The OIG survey also found that parental income was associated with mail engagement. Survey results showed that parents with a higher income reported sending more greeting cards and personal packages, and receiving significantly more greeting cards. Higher income was also associated with receiving more advertising mail. These survey results are consistent with the USPS Household Diary Study, which also found that household mail use is strongly correlated with income.⁴⁶ Notably, however, our survey found that, regardless of the difference in mail engagement, there was no difference by income on whether parents had a positive or negative impression of the Postal Service.

⁴⁵ The USPS Household Diary Study surveyed the broad trends and volume in household mail, which indicated the overall share of bill payments through mail fell from 50 percent in 2009 to 23 percent in 2019. U.S. Postal Service, *USPS Household Diary Study: Mail Use & Attitudes in FY 2019*.

⁴⁶ U.S. Postal Service, *The Household Diary Study: Mail Use & Attitudes in FY 2018*, March 2019, <https://catalogmailers.org/wp-content/uploads/2019/06/USPS-Household-Diary-Study-FY2018.pdf>.

Finally, as previously discussed, our current study found that nearly half of Gen Z children and their parents (46 percent) share the task of checking and sorting mail. Understanding who in the household brings in the mail and sorts it, the “primary mail handler,” is important when conducting market research on consumer behavior and engagement with mail. For instance, previous OIG research has determined that primary mail handlers are more engaged with Postal Service products and services, including more frequently checking the mailbox. We learned that Millennials said they checked their mailbox much less frequently than Gen Xers and Baby Boomers, but Millennials also lived in more diverse living arrangements and were much less likely to identify as a household’s primary mail handler (i.e. may be sharing this responsibility).⁴⁷ While a majority of Gen Zers seem to be engaged in checking mail, it will be important for the Postal Service to survey this activity and track how Gen Zers engage with their mailbox as they age, transition into new living arrangements, and become heads of households themselves.

⁴⁷ U.S. Postal Service Office of Inspector General, *Millennials and the Mail*.

Appendix D: Management's Comments

STEVEN W. MONTEITH
Acting Chief and Customer Marketing Officer
Executive Vice President



September 15, 2020

EVGENI DOBREV
ACTING MANAGER, OPERATIONS CENTRAL
RESEARCH AND INSIGHTS SOLUTION CENTER

SUBJECT: OIG Audit Report for Generation Z and the Mail
Final Review Draft (RISC-WP-18-011)

Thank you for the opportunity to review and respond to the Office of Inspector General (OIG) Draft Audit Report for Generation Z and the Mail, RISC-WP-18-011. Management agrees with the findings noted in the report.

The Postal Service will identify opportunities for shared postal experiences between parents and their Gen Z children. Initiatives would include children letter writing programs as well as instances where this cohort can engage in a gamification with efforts such as usage of our fun stamps (i.e. The Lunar Eclipse and Dinosaur Lenticular Stamps, etc.).

As well, the Postal Service will explore new venues to share research and use cases with the marketing industry, colleges/universities, and other stakeholders to provide exposure on mail as a media channel and ways that mail can be an effective channel to reach Generation Z.

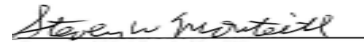
The Postal Service is also in agreement with the need for continued research and analysis related to Gen Z's engagement with mail as this cohort reaches adulthood. We will focus more research on Gen Z as well as other generations and markets to understand our customers better and use insights to encourage further engagement with postal products and services. Understanding the shifts of when this generation is engaging with mail in their lives will help future efforts and evolutions within new technologies and relevant services.

To remain viable and relevant, the Postal Service will continue to adapt to evolving technology, new generations, and the overall needs of our customers.

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Page 1 of 2

Thank you for the opportunity to respond.

A handwritten signature in cursive script, reading "Steven W. Monteith", underlined.

Steven W. Monteith (A)
Chief Customer and Marketing Officer and
Executive Vice President

cc: [REDACTED], Manager, Corporate Audit Response Management



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