Office of Inspector General | United States Postal Service

RISC Report

Customer Perceptions of the U.S. Postal Service During the COVID-19 Pandemic

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Executive Summary

The emergence of the novel coronavirus disease (COVID-19) caused a global pandemic as countries closed their borders and once-bustling streets stilled. Within the United States, various states, counties, and cities issued shelter-at-home orders, social distancing guidance, or both. As the virus spread throughout 2020, the U.S. Postal Service remained a valuable and essential institution for individuals and families who were increasingly relying on mail for deliveries of online goods.

The U.S. Postal Service Office of Inspector General (OIG) conducted a survey to better understand customer needs, wants, and perceptions of the Postal Service during the pandemic. This research provides a snapshot of customer behavior and perceptions during calendar year 2020, as well as self-reported expectations for potential future behavior. We fielded a nationally representative survey in October 2020. When appropriate, we compared these results against previous OIG survey data in order to analyze changes in behavior across four years.

This research revealed that Americans perceived mail to be important, and many held generally favorable views of the Postal Service overall during the pandemic. When asked about specific aspects of the Postal Service, however, respondents were less familiar with their letter carriers, more dissatisfied with post office wait times, and less satisfied with the timeliness of their mail deliveries compared to previous years.

The core ways consumers interacted with the Postal Service were through post office visits, mail receipt, and delivery of online orders. Visits to post offices declined during the pandemic, but of those who had visited, more completed a purchase at the counter. Additionally, customers continued to prefer in-person answers to their customer service-related questions. At home, most respondents checked their mail daily (69 percent) and read their mail more frequently (63 percent) during the pandemic. While respondents sent fewer letters and packages, they ordered items online more frequently.

Highlights

Americans continued to hold favorable views of the Postal Service during the COVID-19 pandemic.

Respondents reported less familiarity with letter carriers and said the timeliness of their mail delivery declined.

During the pandemic, fewer people visited post offices, and respondents sent less mail and fewer packages compared to previous years.

However, respondents checked and read their mail more frequently, and thriving online orders led to a spike in package volume.

When looking towards the future, respondents expected they would continue to rely on online shopping more than they had previously.

Customers ordered medications — both prescription and non-prescription — and medical devices more frequently during the pandemic, and even more customers expected do so in the future.

COVID-19 led to a surge in online orders that is predicted to stay elevated after the pandemic. This ecommerce growth included more frequent orders of all items we asked about in the survey — including non-perishable food, medication, household goods, and leisure items — during the pandemic. Not only did respondents order medication and medical devices more frequently during the pandemic, but even more predicted they would do so at least monthly even after the pandemic was over. When compared to the frequency with which items were ordered before the pandemic, all categories are predicted to see a rise in the frequency with which they are ordered after the pandemic. Additionally, if they had to return online purchases, a majority of respondents predicted they would use the post office to do so in the future.

The Postal Service has played an important role in connecting the nation during a time of pandemic-related social distancing and closures. It has continued to deliver mail and packages to every address in the United States, and careful monitoring of emerging trends will allow the Postal Service to continue to prepare for new and growing demands moving forward.

Observations

Introduction

On March 13, 2020, the President of the United States declared a national emergency in response to the novel coronavirus disease (COVID-19) pandemic's spread throughout the country. States, counties, and cities implemented lockdowns and social distancing measures to combat transmission of COVID-19. Stores and restaurants began to close as consumers were told to avoid all but essential trips. For some, homes turned into offices and schools as videoconferences became a common mode of working and learning. With more time at home, Americans began to adapt their mailing and online ordering behavior to accommodate their new reality.

Through these changes, the U.S. Postal Service continued to serve the country by delivering mail and packages to every address while making necessary adjustments to keep postal employees and customers safe. COVID-19 also changed the mail mix. In the first quarter of fiscal year (FY) 2021, the Postal Service reported delivering more than 1.1 billion packages — a 25 percent growth in shipping and package volume over the same period last year.[1]

This paper describes postal customers' behaviors and expectations during the pandemic. The objectives of this research were:

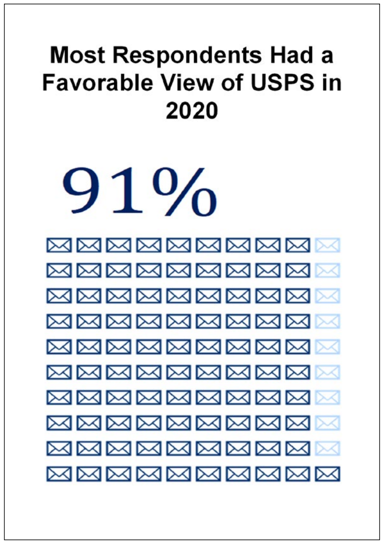
1. What are customers' needs, wants, and perceptions of the Postal Service during the COVID-19 pandemic?
2. In what ways have customers' needs, wants, and perceptions in the U.S. changed since before the pandemic, if at all?
3. How do emerging customers' needs, wants, and perceptions as a result of the pandemic impact the Postal Service?

To answer these objectives, the U.S. Postal Service Office of Inspector General (OIG) contracted with NORC at the University of Chicago to field a nationally representative survey from October 2 through October 27, 2020. The telephone- and web-administered survey asked 3,676 respondents about their perceptions of the Postal Service and use of postal products and services before and during the pandemic, as well as expectations for future, post-pandemic behavior. We then compared 2020 survey results against results from OIG surveys conducted from 2017 to 2019 to examine emerging trends, when relevant and appropriate.[2] Lastly, we interviewed Postal Service management on COVID-19-related operational changes, and conducted research examining impacts of the pandemic on customer preferences and behavior.[3] See Appendix A for more details on our objectives, scope, and methodology.

Public Opinion was Generally Positive, but Some Perceptions of Letter Carriers Declined

As much of the country employed social distancing measures, mail continued to serve as an important channel for ordering household goods, receiving medications, and otherwise connecting to an outside world that had temporarily shut down. Mail was also vital for more personal reasons. For those who were feeling increasingly isolated, mail had become a way to remain connected to family and friends they could no longer visit.[4] According to a Harris Poll from the beginning of the pandemic, the Postal Service was rated the most essential company to America on a composite score

Figure 1: USPS Favorability Rating



Source: OIG.

1 USPS, "U.S. Postal Service Reports First Quarter Fiscal 2021 Results," February 9, 2021, https://about.usps.com/newsroom/national-releases/2021/0209-usps-reports-first-quarter-fiscal-2021-results.htm.
2 The 2020 OIG Survey was administered in October 2020. Previous OIG Postal Surveys were administered in July and August 2017, July and August 2018, and September and October 2019. When comparing relevant questions from the 2020 OIG Survey against questions from the previous OIG Postal Surveys (2017, 2018, 2019), the OIG examined respondents from Internet households in the 2020 OIG Survey to facilitate an accurate comparison with the previous OIG Postal Surveys, which had been administered online only.
3 The Postal Service has conducted its own surveys that included changes in consumer behavior influenced by COVID-19. More information on the Postal Service consumer surveys can be found in Appendix B.
4 USPS, *COVID Mail Attitudes: Understanding & Impact*, USPS Market Research & Insights, November 19, 2020, https://postalpro.usps.com/market-research/covid-mail-attitudes-11.19.20.

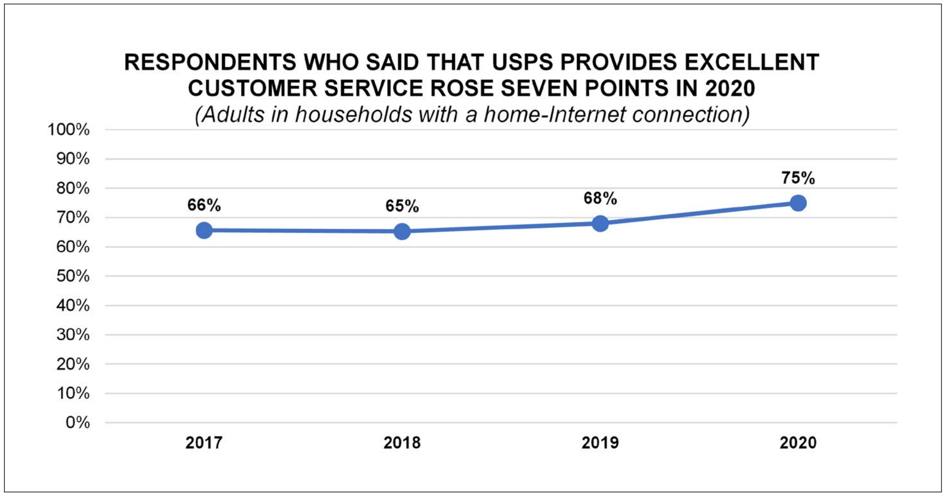
that included measures for resolve, integrity, responsiveness, and permanence.[5] Five months later, the OIG Survey found that Americans continued to hold the Postal Service in high regard, with many perceptions staying stable — or increasing — in 2020 compared to previous years. However, a small portion of the population was concerned about the Postal Service's safety measures, and positive perceptions of letter carriers declined.

Overall Impressions of the Postal Service

The overall opinion of the Postal Service continued to remain steady — and high. More than 90 percent of Americans held a favorable view of USPS (see Figure 1). This number was not significantly different from previous years, which implies that positive perceptions of the Postal Service had been high and continued to remain high. This percentage ranged between 88 and 90 percent in the OIG Postal Surveys for the two years prior to the pandemic.[6] Americans also perceived mail to be useful. A majority of respondents indicated that mail connected them to family and friends (63 percent) and, of those who used mail for business purposes, 60 percent indicated that mail helped them in their business endeavors.

When compared against data from previous years, other positive sentiments spiked in 2020 as well.[7] Sixty-eight percent of respondents said that the Postal Service provided excellent customer service in 2019, but that number rose seven points to 75 percent in 2020 (see Figure 2).

Figure 2: Respondents' Views of USPS Customer Service



Note: Totals from 2020 feature only households that had a home-Internet connection. For additional tables featuring the full sample from the 2020 survey see Appendix D.
Source: OIG.

Regarding emotions surrounding mail, a substantial majority of Americans indicated that they enjoyed both receiving mail (83 percent) and sending mail (66 percent) in 2020 — an increase of six points and nine points, respectively, compared to 2019. Not only did this underscore the positive impressions respondents held of mail in general, but the difference in percentage points between those who enjoyed receiving mail versus sending mail highlighted a preference for receiving mail (and packages) that re-emerged throughout the OIG Survey results. Further examples of changes across the four years of our review are shown in Table 1, below.

5 The Harris Poll, *The Essential 100: Company Reputation Amid COVID-19*, Harris Insights & Analytics LLC, 2020, https://theharrispoll.com/wp-content/uploads/2020/06/Harris-Poll-100EssentialCompanies_FNL-website.pdf.
6 In 2020, the Pew Research Center also found that the Postal Service was viewed favorably by 91 percent of the public. Pew Research Center, *Public Holds Broadly Favorable Views of Many Federal Agencies, Including CDC and HHS*, April 9, 2020, https://www.pewresearch.org/politics/2020/04/09/public-holds-broadly-favorable-views-of-many-federal-agencies-including-cdc-and-hhs.
7 To keep the comparison between the newest 2020 OIG Survey consistent with the methodology of the previous online OIG Postal Surveys, we limited the new OIG Survey sample to households with a home-Internet connection.

Table 1: Respondents' Perceptions of USPS Improved on a Variety of Measures From 2017 through 2020

	2017	2018	2019	2020
Respondents who agreed that...				
They enjoy sending mail	54.7%	56.1%	56.7%	**65.5% (+8.8)**
USPS provides excellent customer service	65.7%	65.3%	68%	**75% (+7)**
Mail is important	90.3%	87.7%	89.7%	**95.5% (+5.8)**
They enjoy receiving mail	78.7%	76.2%	77%	**82.7% (+5.7)**
USPS provides reliable products and services	77%	74.3%	76.9%	**81.3% (+4.4)**
USPS provides secure products and services	76.7%	74.7%	77.4%	**77.9% (+0.5)**
Respondents who had...				
A favorable opinion of USPS*	Not asked	86.4%	86.9%	**90.2% (+3.3)**

*Changes in this question were not statistically significant.
Note: Totals from 2020 feature only households that had a home-Internet connection. For additional tables featuring the full sample from the 2020 survey see Appendix D.
Source: OIG.

Despite these broad, positive impressions of the Postal Service, a small but growing group of respondents indicated greater dissatisfaction with aspects of the Postal Service in 2020 compared to previous years. The percent of respondents who did not think the Postal Service provided reliable products and services rose from 6 percent in 2019 to 9 percent in 2020. Similarly, the percent of respondents who did not agree that the Postal Service provided secure products and services also increased 3 percentage points (from 6 to 9 percent). While this group represents less than one-tenth of the population, a 50 percent increase on these measures signals a significant jump.

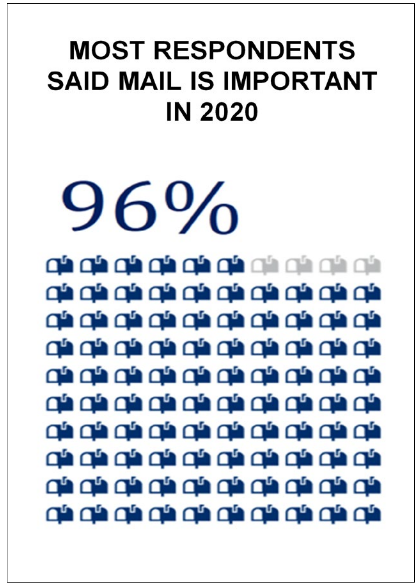
Impressions of Letter Carriers and Mail Delivery

More survey respondents said their letter carriers did not deliver mail on time or handle mail and packages with care in 2020 compared to the year before.

While most overall perceptions of the Postal Service held steady or increased during the pandemic, positive perceptions of letter carriers and mail delivery declined. Familiarity with one's letter carrier dropped five points to 63 percent in 2020 compared to the previous year. During this time, the Postal Service asked employees to maintain social distancing while at work. In addition, more people perceived their letter carrier was not delivering their mail at a consistent time every day (which rose seven points to 18 percent in 2020). During the pandemic, the Postal Service experienced a drop in employee availability. Finally, fewer people agreed their letter carrier handled their mail and packages with care (which decreased five points to 78 percent in 2020). However, a majority of respondents believed their letter carrier was doing a good job on a question that was directly related to the pandemic — 76 percent agreed their letter carrier followed COVID-19 safety protocols such as social distancing.[8]

While familiarity with letter carriers and satisfaction with mail delivery declined during the pandemic, the OIG Survey found that the public recognized the vital role that mail occupied for the country. On a separate question asking about the importance of mail, 96 percent of Americans agreed or strongly agreed with the statement that, "Mail is Important" in 2020 (see Figure 3).

Figure 3: Value of Mail



Source: OIG.

8 Postal Service employees were heavily impacted by COVID-19. As of March 9, 2021, 46,624 Postal Service employees had tested positive for COVID-19.

Visits to Post Offices Declined, but Preferences for In-Person Services Remain

After the onset of the pandemic, the Postal Service updated its post office cleaning policies to reflect Centers for Disease Control and Prevention (CDC) guidelines and distributed millions of face coverings, gloves, and sanitizing products to its employees.[9] In general, the Postal Service's efforts left a positive impression on customers who visited local post offices, although some customers avoided post office visits due to safety concerns. Of respondents who had visited, more reported making counter purchases in 2020 than in previous years. Respondents preferred to ask questions at the counter, rather than by email or telephone.

Post Office Visits

The OIG Survey found that respondents visited post offices less frequently in 2020 when compared against the previous year. In 2019, more than half of all survey respondents (51 percent) said they had visited a post office in the previous month; this number dropped six points to 45 percent in 2020.

Among respondents who had visited a post office during the pandemic, the OIG Survey found that 81 percent perceived their post office and staff had implemented COVID-19 safety protocols. Also, seven-in-ten respondents said they would be comfortable visiting a post office during the pandemic, including those who had not yet done so. However, 15 percent reported they would be uncomfortable doing so. Comfort with different aspects of the post office visit also varied. Eleven percent of Americans said they would feel uncomfortable interacting with a postal employee, and more than a quarter — 27 percent — said they would feel uncomfortable waiting in line. This aligned with results from respondents who had visited a post office; there was a four-point drop in the percent of respondents who found wait times to be reasonable (down to 68 percent in 2020).[10]

SURVEY INSIGHTS

The OIG Survey used a self-reported measure of rurality to assess post office impressions and behavior among respondents from rural, suburban, and urban areas. Compared to urban and suburban customers, rural customers were more comfortable going inside a post office, waiting in line inside a post office, and interacting with a postal employee. They were also more likely to report satisfaction with post office wait times than urban or suburban customers.

Post Office Behavior

Respondents' behavior while inside post offices also changed in 2020 (see Table 2). Of those who had visited a post office within the past year, fewer respondents had checked their post office box, while more respondents had made a counter purchase during their last visit (information is available in Figure 4). This underscored the continued importance of face-to-face interactions.

9 The OIG had previously reported that Postal Service employees were not always complying with COVID-19-related safety measures. Employees were not adhering to local face covering policies, and management at these facilities expressed confusion over both the policies themselves and the extent to which they could enforce those policies. U.S. Postal Service Office of Inspector General, *Employee Safety – Postal Service COVID-19 Response*, Report Number 20-259-R21, November 20, 2020, https://www.uspsoig.gov/sites/default/files/document-library-files/2020/20-259-R21.pdf.

10 The OIG Survey asked about post office visits in different ways on different questions. Depending on the question, between 84 and 86 percent of respondents reported visiting a post office during the pandemic.

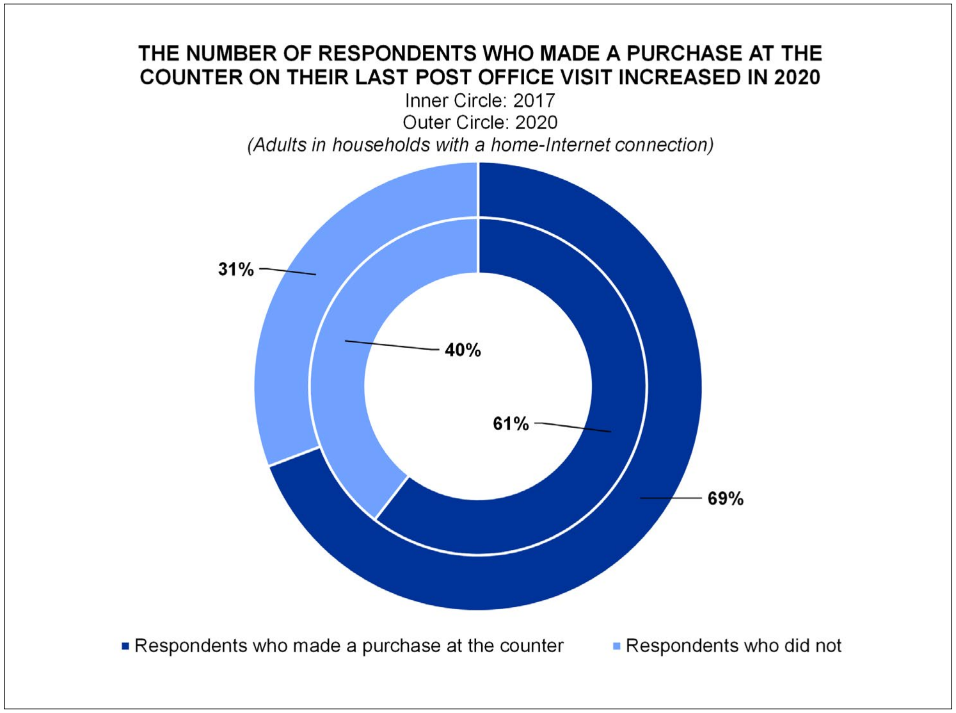
Table 2: Respondents' Post Office Behaviors on Their Last Visit Within the Past Year

	2017	2018	2019	2020
Respondents who completed a purchase at the counter	60.5%	61%	64.8%	**69.2% (+4.4)**
Respondents who put mail or packages into a collection box	43%	42.6%	45.2%	**47.1% (+1.9)**
Respondents who picked up shipping or mailing materials	19.5%	22.9%	23.3%	**21.8% (-1.5)**
Respondents who completed a purchase at a self-service kiosk	13.7%	15.9%	16.4%	**12.4% (-4)**
Respondents who visited a post office in the past month	54.8%	52.1%	51.1%	**45% (-6.1)**
Respondents who checked a Post Office Box	16.8%	19.9%	19.9%	**10.8% (-9.1)**

Note: Totals from 2020 feature only households that had a home-Internet connection. All column totals only include respondents who had visited a Post Office within the past year. For additional tables featuring the full sample from the 2020 survey see Appendix D.
Source: OIG.

Respondents' use of self-service kiosks dropped compared to the previous year, reversing a trend of increased usage of self-service kiosks across prior years. Twelve percent of respondents said they had used a self-service kiosk on their last visit (compared to 16 percent in both 2019 and 2018, and 14 percent in 2017). Respondents also preferred to speak to a postal employee rather than use a self-service kiosk. Half of all survey respondents chose this option, while 28 percent said they would prefer the self-service kiosk. Another 22 percent were not sure what they would prefer.

Figure 4: Purchases at the Post Office Counter



Note: Totals from 2020 feature only households that had a home-Internet connection. Respondents who had not visited a post office within the past year were not included in the denominator on this question. Figures may not add up to 100% due to rounding. For additional tables feature the full sample from the 2020 survey see Appendix D.
Source: OIG.

Respondents expected to increasingly take advantage of various post office services and products after the pandemic ended.[11] Most respondents predicted they would complete counter purchases at a post office in the future (86 percent), highlighting the important role that interactions with postal representatives continue to play for the Postal Service. About two-thirds (65 percent) of respondents also expected to place mail or packages into collection boxes, while roughly half predicted they would pick up shipping materials and drop off pre-paid packages at post offices in the future.

11 These observations are customers' speculations about future activities and not a guarantee of actual future actions.

SURVEY INSIGHTS

Since the onset of the pandemic, persons with disabilities and people who were retired were the least likely groups to use a self-service kiosk at a post office. There may be an opportunity to boost self-service kiosk use by re-examining, and then raising awareness of, self-service kiosk accessibility.

Customer Service

In-person interactions continued to be the preferred method by which customers would like to contact the Postal Service. When asked about their top preference for resolving questions, the largest group of respondents — more than double the next-largest group — continued to want to ask in-person at the post office. The pandemic did not change this perspective, which remained steady at 46 percent. Meanwhile, an interest in using contactless methods in the future rose, indicating a potential opportunity for the Postal Service if it were to continue to build out alternative customer service channels.[12]

Respondents Read Their Mail More Frequently During the Pandemic, but Sent Fewer Letters and Packages

During the pandemic, respondents increased how often they read and reviewed their mail — almost seven-in-ten Americans reported checking their mail daily. However, the OIG Survey found a downturn in the frequency with which respondents sent mail and packages. In Quarter 1 of FY 2021 — which partially overlapped with the timing of the OIG Survey — the Postal Service experienced a 3.9 percent decline in Marketing Mail volume and a 4.1 percent decline in First-Class Mail volume.[13]

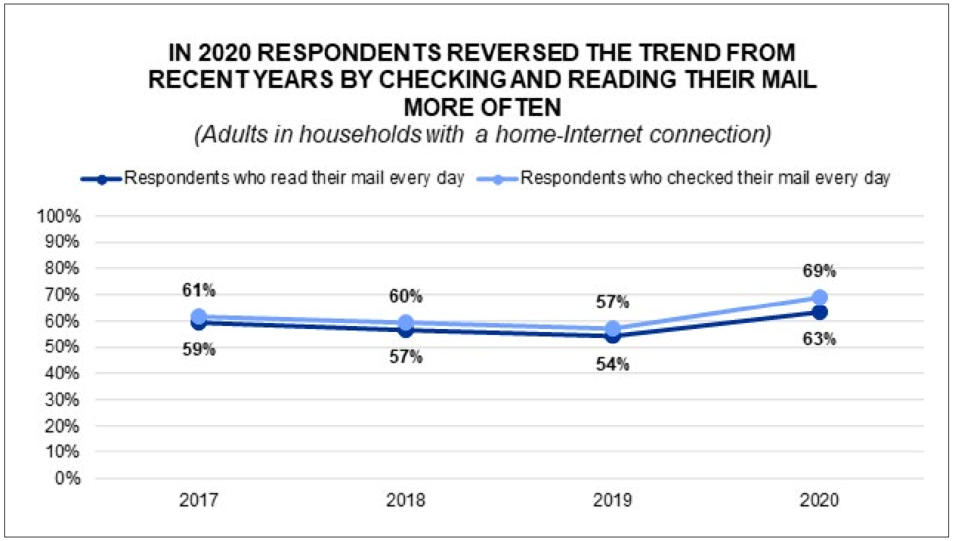
Reading Mail

Amidst the disruption caused by the pandemic, Americans checked their mail more frequently in 2020 than they had during the same period the previous year. While only 57 percent of respondents reported checking their mail every day in 2019, 69 percent reported doing so daily in 2020. More Americans also took the time to read and review their mail — 63 percent of did this every day (see Figure 5).

Mail continued to be an important channel for receiving bills.[14] Despite the increasing prevalence of online bill payment, the OIG survey found that 67 percent of respondents continued to receive bills by mail. And while most respondents tended to pay bills online, 29 percent of respondents continued to send their payments by mail.[15]

12 These contactless methods included calling the customer service telephone number (which increased 3 points between 2019 and 2020 to 22 percent), emailing customer service (which increased 1 point to 8 percent), and asking an online chatbot on the USPS website (which increased 2 points to 8 percent).
13 USPS, “U.S. Postal Service Reports First Quarter Fiscal 2021 Results,” February 9, 2021, https://about.usps.com/newsroom/national-releases/2021/0209-usps-reports-first-quarter-fiscal-2021-results.pdf.
14 According to the 2019 Household Diary Study, the average household received approximately 10 total bills per month, with credit card bills being the most frequently received bill type. The decline in transactional mail is a broader trend that has continued during the period of the OIG Survey. For more information see USPS, *The Household Diary Study: Mail Use & Attitudes in FY 2019*, https://www.prc.gov/docs/113/113300/2019%20Household%20Diary%20Study_Final.pdf.
15 The percent of respondents who paid their bills by mail did not change in a statistically significant way over the years.

Figure 5: How Often Respondents Checked and Read Their Mail



Note: Totals from 2020 feature only households that had a home-Internet connection. For additional tables featuring the full sample from the 2020 survey see Appendix D.
Source: OIG.

Sending Mail and Packages

The OIG Survey found that fewer Americans were sending traditional mail items with regular frequency during the pandemic. Up until 2020, the use of personal mailings — greeting cards, personal packages, personal letters, and postcards — had been growing for respondents who indicated they had used them before.[16] During COVID-19, all categories dropped by at least 10 points.

Postcards saw the greatest decline in monthly (or more) sending of any mail product; this number dropped 31 points from 2019 levels. In 2020, only one-in-ten Americans reported sending postcards with the same frequency, reversing an increasing trend from previous years.

> The percentage of respondents who sent a personal letter at least once a month dropped from 45 percent in 2019 to 18 percent in 2020.

Letters and cards can provide a sense of connection during a pandemic, but the percent of Americans sending them decreased in 2020. The percentage of respondents who had sent a personal letter at least once a month dropped from 45 percent in 2019 to 18 percent in 2020. Of the traditional mail products, greeting cards experienced the smallest decline but still dropped 11 points to 20 percent in 2020. Table 3 below shows the change in respondents who sent various products once a month or more between 2017 and 2020.

Table 3: Respondents Who Sent Mail Products Once a Month or More Fell in 2020 for All Products Included in the Survey

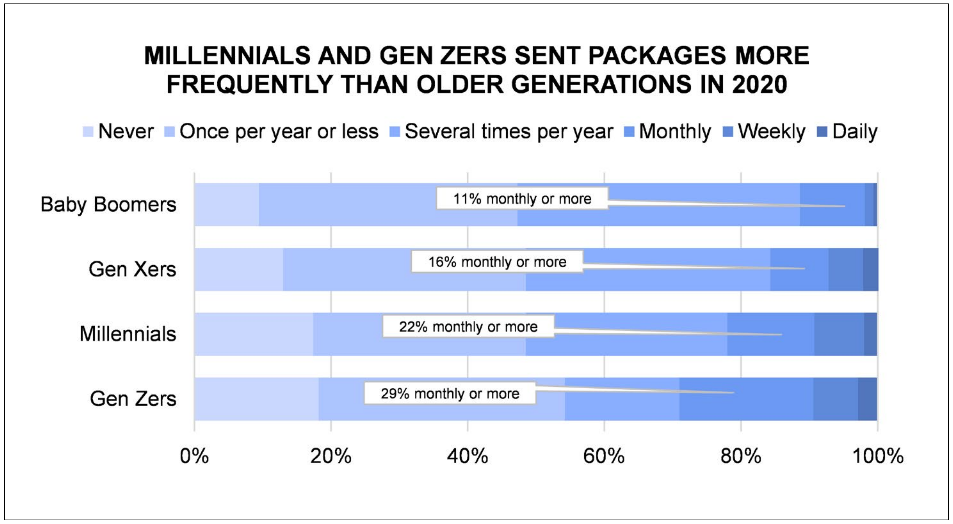
Product	2017	2018	2019	2020
Greeting Cards	24.6%	30.6%	30.9%	**19.8% (-11.1)**
Personal Packages	27.9%	33.3%	34.7%	**17% (-17.7)**
Personal Letters	39.2%	43.9%	45.1%	**17.8% (-27.3)**
Postcards	32.5%	38.4%	40.6%	**10% (-30.6)**
Business Packages	38.7%	48.1%	50.1%	**22.2% (-27.9)**
Business Letters	41.9%	49%	49.7%	**20.1% (-29.6)**

Note: Respondents who had never used any of the traditional mail products in our survey were not selected for this question. Totals from 2020 feature only households that had a home-Internet connection. For additional tables featuring the full sample from the 2020 survey see Appendix D.
Source: OIG.

While the decline in package sending was smaller than the decrease in letter sending, it was still significant. Respondents who reported sending a personal package at least once a month dropped by one-half between 2019 and 2020 — from 35 percent to 17 percent. Of those who sent personal packages, respondents who were in Generation Z (aged 18-24) sent them more frequently compared to older generations (see Figure 6).

16 Respondents who had never used any of the traditional mail products in our survey were not selected for this question.

Figure 6: Package Sending Frequency by Generation in 2020



Source: OIG

During a time when companies were shutting down and many people were finding their workhours reduced or eliminated, Americans sent fewer business items monthly. Half the respondents had sent a business letter at least once a month in 2019, but this percentage more than halved to 20 percent in 2020. The percent of respondents who had sent a business package at the same frequency saw a similar decline (from half of respondents in 2019 to less than a quarter in 2020). With the decline in package sending behavior came a decline in the need for mailing materials. Americans ordered less mailing materials (for example, boxes and tape) online during the pandemic (30 percent) compared to before the pandemic (32 percent). However, more respondents planned to order mailing materials online (42 percent) in the future.

SURVEY INSIGHTS

Younger Americans used the Postal Service to send packages more frequently than older generations. Generation Zers were almost twice as likely to send packages monthly (or more) compared to Generation Xers (age 41–56) and more than twice as likely as Baby Boomers (age 57–75) to do this. While younger generations may use traditional mail less frequently — Millennials (age 25–40) and Gen Zers were more likely to say they've never sent letters and greeting cards — focusing on the experience of sending packages can present new business opportunities for USPS. Previous OIG research found that Gen Zers value packages and suggested opportunities for innovating the user experience and targeted marketing for Gen Z.[17]

Potential Growth for Some Ancillary Products and Services

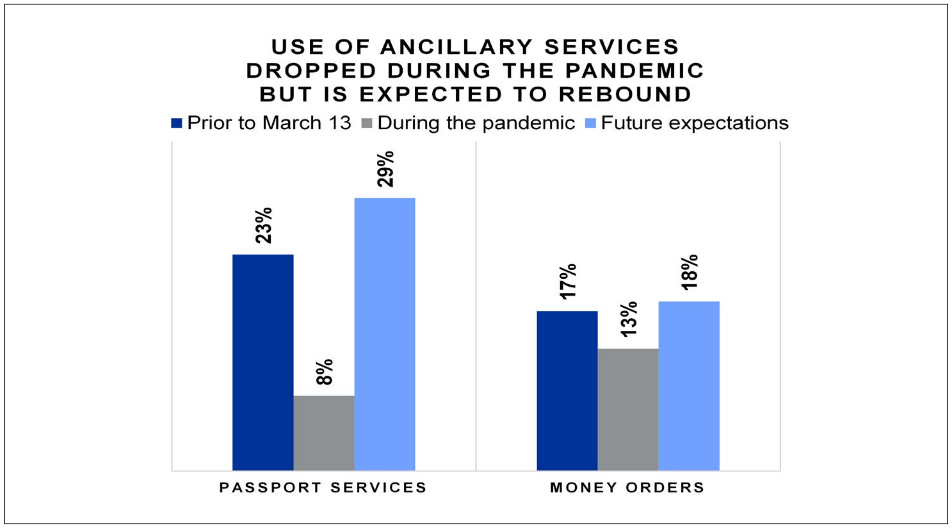
The Postal Service offers a variety of products and services for customers; some of these are available at local post offices, while others can be accessed online or via a letter carrier. These products and services could be helpful during a time of social distancing since they provide alternatives with which to send and receive packages, as well as contactless methods with which to access mail information. Our survey found that respondents predicted their future use of most of these ancillary products and mail services would meet or exceed pre-pandemic levels.

17 U.S. Postal Service Office of Inspector General, *Generation Z and the Mail*, Report Number RISC-WP-20-009, September 21, 2020, https://www.uspsoig.gov/sites/default/files/document-library-files/2020/RISC-WP-20-009.pdf.

Ancillary Products

Passport services and money orders that are provided at post offices are predicted to return to — or exceed — pre-pandemic levels in the future. Of those who had an opinion, almost a quarter of respondents (23 percent) reported using passport services before the pandemic, and even more respondents were interested in using postal passport services after the pandemic was over (29 percent). In the seven months between March 13, 2020 and the time of our survey, 8 percent of respondents reported using passport services at post offices — despite pandemic-related travel restrictions. Seventeen percent of respondents reported buying money orders at the post office before the pandemic, and more respondents expected to do so in the future (18 percent). For a graph representing this information, see Figure 7.[18]

Figure 7: Use of Ancillary USPS Products Before, During, After the Pandemic

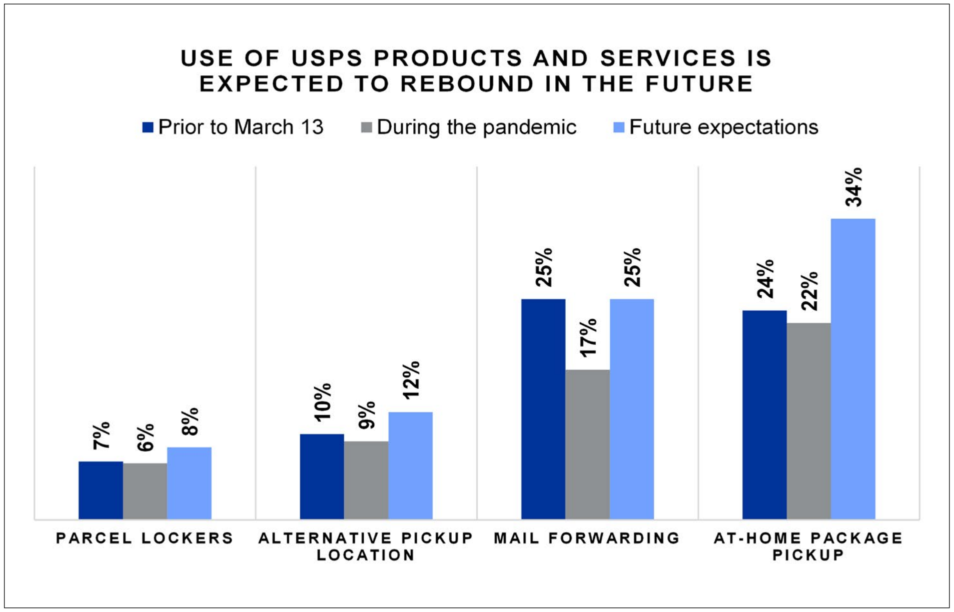


Note: "During the pandemic" encompasses the time period from March 13, 2020, until the day the respondent took the survey. Data did not allow us to assess whether differences in pandemic behavioral changes were due to a shorter time period or changes in behavior.
Source: OIG.

Mail and Package Services

Americans who were temporarily displaced during the pandemic — such as college students who moved home when campuses closed — may benefit from mail services such as mail forwarding. However, use of this service decreased; 17 percent of respondents reported using this service in the pandemic months prior to the survey. A quarter of respondents had used this service at some point before the pandemic, and a similar percentage predicted they would do so in the future (see Figure 8).

Figure 8: Use of USPS Products Before, During, and After the Pandemic



Note: The categories parcel lockers, alternative pickup locations, or at-home package pickup held steady between "Prior to March 13" and "During the Pandemic." Changes in these categories were not statistically significant. "During the pandemic" encompasses the time period from March 13, 2020, until the day the respondent took the survey. Data did not allow us to assess whether differences in pandemic behavioral changes were due to a shorter time period surveyed or changes in actual behavior.
Source: OIG.

18 Percentages are calculated among respondents who had a definite opinion (i.e., among respondents who chose, "Yes" or "No"). Respondents who were unsure of behaviors were excluded from the denominator but are discussed in greater detail in the Survey Insights Box on the following page.

More customers predicted they would use package-related services in the future than had used them in the past. In particular, the OIG Survey found a high level of interest in using at-home package pickup in the future. Twenty-four percent of respondents had used package pickup before the pandemic, but 34 percent planned to use this service after the pandemic was over.

SURVEY INSIGHTS

Between 13 to 18 percent of respondents indicated they "Don't Know" whether they might try an ancillary product or mail service in the future. This presents an opportunity for the Postal Service to market to customers with low usage, as they may be unaware of these offerings.

Use of Electronic Services

Customers used multiple platforms to access information about the Postal Service — as well as information about their mail and packages — and the most popular was usps.com, followed by Informed Delivery and then USPS Mobile (the USPS mobile app).[19] More than two-thirds of respondents indicated that the pandemic had not affected their use of either the Postal Service's website (73 percent) or the mobile app (72 percent). During the pandemic, the userbase for Informed Delivery grew and the way respondents used the platform changed.[20] Thirty-two percent of respondents said that the pandemic had increased their use of Informed Delivery. However, compared to 2019, fewer respondents were clicking on an advertisement or taking advantage of an offer. Specifically, the percentage of consumers who reported clicking on an Informed Delivery advertising image to, for example, take advantage of an offer dropped 16 points between the two years. Instead, respondents often used Informed Delivery to access package tracking details.

Respondents primarily used Informed Delivery to access package information and tracking details rather than to click on advertisements or offers.

COVID-19 Led to a Surge in Ecommerce That is Predicted to Stay Elevated After the Pandemic

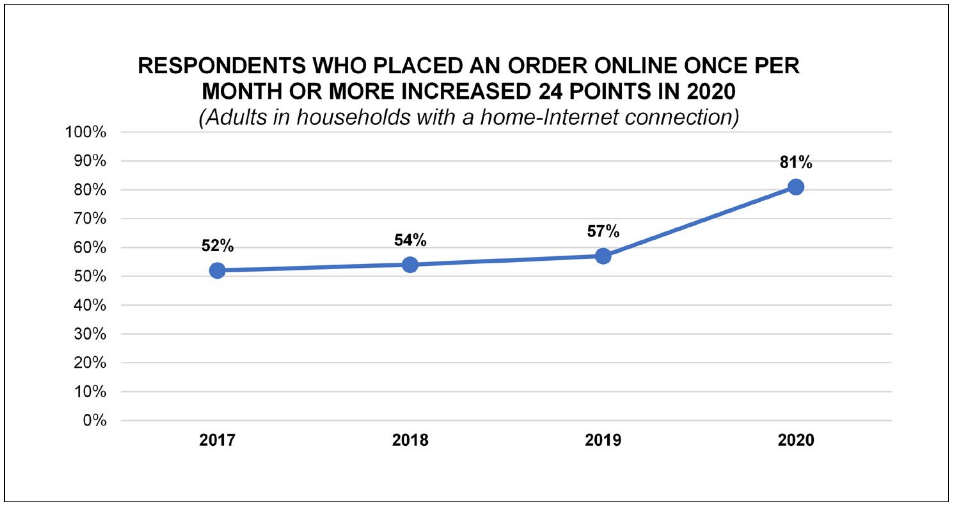
Consumers made less frequent in-person shopping trips amid social distancing efforts and exhortations to remain home.[21] Instead, some consumers relied on alternatives such as online ordering.[22] The OIG Survey found that respondents had increased the frequency of their online orders for every item category included in the survey during COVID-19. However, the magnitude of increase varied between different categories of goods. Respondents also predicted that in the future, monthly (or more) orders of all items surveyed (such as clothing and non-perishable food) would stay above pre-pandemic levels — though respondents expected the frequency for most online orders to decline from peak pandemic levels.

Ecommerce During the Pandemic

Americans placed orders online far more frequently in 2002 than in past years. The OIG Survey found that 81 percent of Americans had ordered an online good at least once a month in 2020, which represented a 24-point increase compared to 2019 (see Figure 9). The bulk of this increase came from households ordering items on a weekly basis, which rose 16 points to reach 38 percent of survey respondents in 2020.

19 Of those who indicated use during the pandemic, the OIG Survey found that 60 percent reported they had used usps.com, 47 percent had used Informed Delivery, and 35 percent had used USPS Mobile.
20 Informed Delivery is an online platform that allows users to track and receive scanned images of their incoming mail and may also include advertising content. For more information, see USPS, "Informed Delivery," August 2020, https://www.usps.com/business/pdf/informed-delivery-overview.pdf.
21 Accenture, *How Will COVID-19 Change the Retail Consumer?: Data-driven Insights into Consumer Behavior*, May 5, 2020, https://www.accenture.com/_acnmedia/PDF-126/Accenture-COVID-19-Retail-Consumer-Resarch-Wave-Four-POV.pdf.
22 Brody Buhler, "How Covid-19 Has Brought Delivery into the Future," *Accenture*, July 28, 2020, https://www.accenture.com/au-en/blogs/voices-public-service/how-covid-19-has-brought-delivery-into-the-future#_ftn2.

Figure 9: Online Ordering Frequency



Note: Totals from 2020 feature only households that had a home-Internet connection. For additional tables featuring the full sample from the 2020 survey see Appendix D.
Source: OIG.

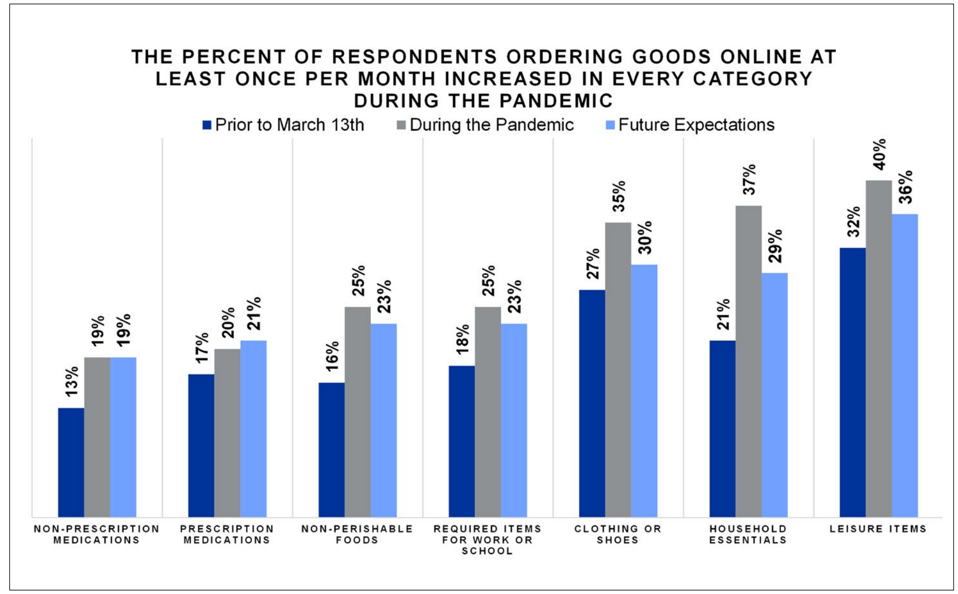
The increase in online ordering was most notable for household goods; the percent of respondents ordering online at least once a month rose 16 points compared to those who had done so before the pandemic. Online orders for non-perishable foods rose nine points, while orders for clothing or shoes rose eight points. For more information on other goods, see Figure 10.

Ecommerce Expectations for the Future

Americans expected a lasting increase in the frequency with which they would order goods online in the future. When asked about their general preferences for making online purchases, almost three-quarters of survey respondents expected to continue ordering online just as frequently after the pandemic as they had during the pandemic. An additional eight percent expected to order items online more often in the future.

The OIG Survey asked respondents how often they expected to place online orders after the pandemic for various categories of goods. For every category identified, respondents said they expected their online orders — on a monthly or more frequent basis — to increase after the pandemic compared to before the pandemic. This was especially true for medications, but also true for all other items, even if their predicted future order rates were not as high as their pandemic-related peaks.

Figure 10: Online Ordering Before, During, and After the Pandemic



Note: "During the pandemic" encompasses the time period from March 13, 2020, until the day the respondent took the survey.
Source: OIG.

Fewer respondents (29 percent) predicted they would order household essentials monthly (or more) in the future compared to percentages during the pandemic (37 percent). However, this predicted future percentage remains 8 points higher than the percentage of respondents who had ordered household essentials at that rate before COVID-19. Similarly, fewer Americans predicted they would order leisure items once a month or more in the future (36 percent), but this rate remains 4 points higher than the percentage who had done so before the pandemic. While there were a couple of notable exceptions (see Survey Insights Box below), most respondents anticipated that their post-pandemic online purchases would be less frequent than their pandemic peaks — but still higher than rates before the pandemic.

Return of Online Purchases

Despite significant changes in their online ordering behaviors, consumer preferences for return methods remained largely unaffected by the pandemic. When asked how they returned online purchases before the pandemic, 51 percent of respondents said they sent them at the post office. This response was selected far more frequently than any other response, which included the option to use a carrier other than USPS (29 percent), go into the retail store (25 percent), or leave the package for a letter carrier at home (14 percent).

Monitoring emerging consumer preferences shaped by the pandemic could shed light on future opportunities for delivery providers.

The majority of respondents (52 percent) said that they would still prefer to make returns at a post office after the pandemic. There was a meaningful increase in the percent of respondents who preferred to leave returns at home for pickup by letter carriers, from 14 to 18 percent.

Conclusion

Nobody knows when the pandemic will end, or how society might be changed by this experience. Our survey results indicate a range of impacts for the Postal Service — some trends have held steady during the pandemic while others accelerated or reversed. The shifts in ecommerce behavior are some of the most noteworthy trends. If survey respondents' predictions of their future shopping habits prove accurate, there could be a sustained increase of online orders of prescription and non-prescription medications, non-perishable goods, and household essentials. Continued monitoring of emerging consumer preferences shaped by COVID-19 could shed light on market opportunities for delivery providers.

SURVEY INSIGHTS

More respondents ordered prescription medications, non-prescription medications, and medical devices (such as glasses) at least monthly during the pandemic, and respondents said they would continue ordering at levels similar to, or higher than, pandemic peaks after it ended. Monitoring ecommerce trends that are predicted to rise in the future could provide an opportunity for the Postal Service to further accommodate these emerging trends.

The pandemic has also resulted in a tremendous focus on health and safety. Our survey found that most respondents believe the Postal Service has established COVID-19 safety protocols and that postal employees generally follow those protocols. However, as mentioned above, a small number of respondents — around 15 percent — said they were uncomfortable visiting a post office during the pandemic, and there was a six-point drop in the percent of respondents indicating they had visited a post office in the previous month compared to 2019.

The Postal Service has long been a trusted and valued public institution, delivering mail to every address in the nation nearly every day. During these unprecedented and challenging times, the Postal Service has continued to provide a means for people staying at home to receive essential goods and communicate in a more personal manner, as well as served as a backbone for businesses seeking to deliver to consumers who can no longer visit stores in person.

Appendices

Click on the appendix title below to navigate to the section content.

Appendix A: Additional Information

Objective, Scope, and Methodology

The objective of this paper was to measure the impact of the COVID-19 pandemic on customers' needs, wants, and perceptions as they relate to the Postal Service.[23] The research aimed to address three questions:

1. What are customers' needs, wants, and perceptions of the U.S. Postal Service during the COVID-19 pandemic?
2. In what ways have customers' needs, wants, and perceptions in the U.S. changed since before the pandemic, if at all?
3. How do emerging customers' needs, wants, and perceptions as a result of the pandemic impact the Postal Service?

The OIG's research approach followed a multi-step methodology to assess the effects of the pandemic on customers' perceptions and behaviors:

1. *Contracted with the NORC at the University of Chicago to administer a nationally representative survey*. The survey had 3,676 respondents and was administered between October 2 and October 27, 2020. It was fielded before the 2020 election and spike in new COVID-19 cases in Winter 2020-2021.[24] The survey encompassed questions about customer preferences, actions, and behaviors before and during the pandemic, as well as questions about their expected future behaviors.[25] A full description of the survey methodology from NORC is contained in Appendix C.

   For analyses of the survey results, the OIG conducted statistical tests as appropriate, including t-tests, chi-squared tests, and tests for the strength of association (Cramer's V and Gamma). All noted statistical differences have p-values that are statistically significant at the 95 percent level, unless stated otherwise.

2. *Compared new survey questions against previous iterations of an OIG Postal Survey, when relevant*. The OIG looked for emerging trends as it compared new findings in 2020 against prior data on relevant questions from 2017 to 2019. The OIG tested and adjusted for errors that might arise from panel discontinuity in multiple ways. Since previous iterations of the OIG Postal Surveys were based on a non-probability-based sample that opted into the survey, selected questions from these surveys had been previously appended to a probability-based telephone survey.[26] Because the previous iterations of the OIG Postal Surveys were online surveys, the OIG examined only Internet households in the new dataset when comparing across four years. The OIG examined trends that significantly changed in 2020 during the pandemic, as well as steady trends that persisted despite the pandemic.[27]

3. *Conducted interviews with Postal Service management*. The OIG interviewed postal management about COVID-19-related policy and operational changes that may have affected customers, as well as customer trends observed by the Postal Service. Interviewees included the Vice President of Customer Experience, the Director of Innovations, and the Manager of Market Research and Insights.

4. *Reviewed relevant research and conducted a literature review*. The OIG conducted a literature review to examine existing studies on the ways COVID-19 affected customer preferences and behaviors. The OIG also examined internal Postal Service surveys and presentations to help contextualize findings from NORC's survey.

23 The OIG Survey defined the pandemic as beginning on March 13, 2020, after the President declared the pandemic a national emergency.
24 CDC, "Trends in Number of COVID-19 Cases and Deaths in the US Reported to CDC, by State/Territory," CDC COVID Tracker, Accessed February 11, 2021, https://covid.cdc.gov/covid-data-tracker/#trends_dailytrendscases.
25 These predictions, while helpful in getting a sense of customers' current expectations of future behavior, are not a guarantee of future behavior.
26 Comparing between these opt-in surveys and probability-based data suggested minimal differences between modes.
27 The OIG conducted analyses of variance (commonly called ANOVAS), including both binomial and one-way ANOVAs. When results were statistically significant, additional post-hoc tests were conducted to pinpoint significant years.

The OIG conducted work for this white paper in accordance with the Council of the Inspectors General on Integrity and Efficiency's Quality Standards for Inspection and Evaluation. We discussed our observations and conclusions with postal management on March 19, 2021, and included their comments where appropriate.

Prior Coverage

Report Title	Objective	Report Number	Final Report Date	Monetary Impact
Employee Safety – Postal Service COVID-19 Response	To understand what safety procedures the Postal Service is implementing in regard to the COVID-19 pandemic.	20-259-R21	November 20, 2020	N/A
Operational Changes to Mail Delivery	To assess how the COVID-19 pandemic affected the implementation of the proposed June 2020 operational changes.	20-292-R21	October 19, 2020	N/A
Processing Readiness of Election and Political Mail During the 2020 General Elections	To understand how the COVID-19 pandemic will affect the 2020 Election and Political Mail procedures.	20-225-R20	August 31, 2020	N/A

Appendix B: Postal Surveys

The Postal Service fields various surveys to determine market trends and gauge customer sentiment, some of which have included questions related to the COVID-19 pandemic.

Survey	Description
Brand Health Tracker	A quarterly report of an ongoing survey of consumer and commercial opinion and satisfaction with the Postal Service's mail, retail, shipping, and digital services.
Mail Moments	An online survey conducted to track mail behavior and bill payment activities of consumers.
COVID Mail Attitudes	An online survey of U.S. consumers to understand attitudes towards mail and mail use during the COVID-19 pandemic.

Service, Satisfaction, and the Pandemic

Consumers and commercial customers continued to be concerned about the virus, including its effects on customers' willingness to send or receive mail and packages and confidence in visiting a post office.[28] In the third quarter of FY 2020 (April-June), 41 percent of consumer respondents reported that the spread of COVID-19 had a "substantial impact" or "some impact" on their behavior related to sending and receiving of mail or packages.[29] By the next quarter, however, this percentage had dropped seven points to 34 percent.[30]

The Postal Service's Mail Moments Fall 2020 survey found that 52 percent of consumer respondents checked their mail every day during COVID-19.[31]

Consumers also reported the direct impacts of the COVID-19 pandemic on their mail behavior, and 43 percent report "some impact" or "substantial impact" on their attitudes regarding visiting a post office.[32]

According to the COVID Mail Attitudes surveys, consumers are using mail to stay connected to friends and family during the pandemic, claiming that mail from loved ones makes them feel connected when people must physically distance themselves from one other. Sixty-five percent of respondents agreed that cards and letters "lift their spirits" during the pandemic, a percentage that held steady from April to November 2020.[33]

In Quarter 4, 2020, commercial shipping customers' overall opinion of the Postal Service declined from Quarter 3, 2020.[34] In Quarter 3, 2020, 60 percent of commercial respondents reported the spread of COVID-19 had a "substantial impact" or "some impact" on their behaviors related to sending or receiving of mail and packages.[35] By the next quarter, 45 percent of commercial respondents were concerned with the impact of COVID-19 on sending and receiving mail and packages, a 15-point decrease.[36] Forty-five percent of commercial customers reported the spread of COVID-19 had "some impact" or "substantial impact" on their behavior related to sending mail or packages, while over half (53 percent) reported "some impact" or "substantial impact" on their attitudes regarding visiting a post office for business reasons.[37] Forty-one percent of shipping customers perceived USPS "delivered items to destination as fast as possible," and only 35 percent reported USPS "always delivers packages on the exact day I expect it."[38]

28 U.S. Postal Service, *Consumer and Commercial Brand Health Tracker: Mail Services Quarter 3 2020*, USPS Customer & Market Insights, pp. 54-55.
29 The question had not specified whether this impact had positively or negatively impacted their behavior. The specific question asked: "How has the spread of coronavirus (i.e., COVID-19) impacted your attitudes and behaviors regarding sending and/or receiving mail/packages?" Ibid., p. 55.
30 The next quarter's survey was fielded between July-September 2020. USPS, *Consumer and Commercial Brand Health Tracker: Mail Services Quarter 4 2020*, USPS Customer & Market Insights, p. 13.
31 The Postal Service defined "every day" as six days a week.
32 U.S. Postal Service, *Mail Services Quarter 4 2020*, p. 14.
33 U.S. Postal Service, *COVID Mail Attitudes: November 2020*, USPS Customer & Market Insights, pp., 4, 6-7.
34 USPS, *Consumer and Commercial Brand Health Tracker: Shipping Services Quarter 4 2020*, USPS Customer & Market Insights, p. 8.
35 USPS, *Mail Services Quarter 3 2020*, p. 53.
36 USPS, *Mail Services Quarter 4 2020*, p. 11.
37 Ibid., p. 11.
38 USPS, *Consumer and Commercial Brand Health Tracker: Shipping Services Quarter 4 2020*, USPS Customer & Market Insights, p. 19.

In the first quarter of FY 2021 (October–December 2020) — which included the fielding dates of the OIG Survey — overall opinion and satisfaction had returned to about the same point from the previous year (60 percent).[39] A perception that USPS is reliable (58 percent) and keeps mail safe (58 percent) had declined among consumers, compared to the previous quarter.[40] Thirty-three percent reported that COVID-19 had "some" or a "substantial" impact on their sending and/or receiving of mail/packages, and 41 percent reported it had "some" or "substantial" impact on their attitudes and behavior regarding visiting a post office.[41] Informed Delivery sign-ups have increased compared to the previous year (up seven points to 25 percent), with the biggest group using Informed Delivery to track packages (63 percent).[42]

39 USPS, *Consumer and Commercial Brand Health Tracker: Mail Services Quarter 1 2021*, USPS Customer & Market Insights. p. 6.
40 Ibid., p. 34.
41 Ibid., p. 14.
42 Ibid., pp. 37-38.

Appendix C: NORC Survey Methodology

The OIG Survey was conducted by NORC on behalf of the USPS Office of the Inspector General using NORC's AmeriSpeak® Panel as the sampling source. Funded and operated by NORC at the University of Chicago, AmeriSpeak® is a probability-based panel designed to be representative of the U.S. household population. Randomly selected U.S. households are sampled using area probability and address-based sampling, with a known, nonzero probability of selection from the NORC National Sample Frame. These sampled households are then contacted by U.S. mail, telephone, and field interviewers (face-to-face). The panel provides sample coverage of approximately 97 percent of the U.S. household population. While most AmeriSpeak® households participate in surveys by web, non-Internet households can participate in AmeriSpeak® surveys by telephone.

Sampling and Screening

NORC's AmeriSpeak® Panel generated a sample of U.S. adults ages 18 and older. The sample is selected from the AmeriSpeak® Panel using sampling strata based on age, race/Hispanic ethnicity, education, and gender. The size of the sample per sampling stratum is determined by the population distribution for each stratum. The sample selection considers the differential survey competition rates by the demographic groups to assure the panel members with complete interviews for the study are representative of the target population. Only one adult per household is eligible for selection.

Survey respondents must have indicated that they are "Extremely Familiar", "Very Familiar", "Moderately Familiar", or "Slightly Familiar" with the United States Postal Service during screening. Participants who answered the screening questions, regardless of eligibility for the survey, are considered a screener complete. Eligible respondents based on the screening question then who then completed the survey are considered a survey complete. Of those eligible, the interview completion rate was 98 percent.

Fielding

The survey was fielded from October 2, 2020, to October 27, 2020. NORC collected 3,676 interviews, with 3,619 administered by web mode and 57 by phone mode.

Data Processing

NORC applied cleaning rules for the survey data for quality control. The cleaning process removed survey responses in the main study interview question from non-eligible respondents. Removed respondents were not counted towards the total number of interviews delivered. NORC removed one percent of completed interviews for skipping more than 50 percent of the questions, 3.4 percent of completed interviews for speeding through the survey in less than one-third of the median length of interview (LOI), and 0.9 percent of completed interviews who straight-line responded on multiple grids.

Demographics Table

Table 4: Demographics of the OIG Survey Sample

Category	Final Sample (unweighted)
Household Income	24.3% Less than $30,000 39.9% $30,000 to $74,999 23.8% $75,000 to $124,999 12% $125,000 Plus
Age	33.6% 18 to 34 years old 25.9% 35 to 49 years old 21.7% 50 to 64 years old 18.8% 65+ years old
Race / Ethnicity	61.9% White 12.1% Black 17.7% Hispanic 2.9% Asian/Pacific Islander 5.4% Other
Education	4.8% Less than High School 17.4% High School Equivalent 42.7% Some College/Associate Degree 20.3% Bachelor's Degree 14.7% Graduate Degree

Source: NORC Project Report, NORC Card.

Appendix D: Full 2020 Sample Results

The OIG Survey was designed to be a probability sample of all adults, while the approach taken by earlier surveys restricted households without Internet access from participating. The primary approach used to interview non-Internet households was to use a probability-based survey that relied on probability-based sampling methods. Respondents were permitted to complete the survey via telephone if they wished.

Where appropriate, the OIG compared questions from the 2020 OIG Survey against identical questions from previous OIG Postal Surveys conducted between 2017 and 2019. To minimize any biases that might arise from comparing different survey panels across multiple years, the OIG had taken the following precautions:

- In the past, the OIG had appended a few questions from the 2019 OIG Postal Survey to a probability-based telephone survey to test for the reliability and validity of survey results. The results from the probability-based telephone survey aligned with those of the 2019 OIG Postal Survey.
- To facilitate a comparison from the 2020 OIG Survey against previous online panels, the OIG examined only respondents from households with a home-Internet connection (Internet-households) in the 2020 OIG Survey. While there was often a statistically significant difference between respondents from Internet households and respondents from non-Internet households, further post-hoc tests revealed that this difference was sometimes weak.

Throughout this white paper, the OIG used results from the full 2020 sample when reporting on questions that were new to the 2020 OIG Survey. However, when the OIG had the opportunity to compare across previous years, the OIG used only results from respondents from Internet households for 2020. To see the results for the full 2020 sample on questions that were compared across previous years, please refer to the tables below.

In the 2020 OIG survey, respondents from non-Internet households comprised 12 percent of all respondents. Compared to respondents from Internet households, this group held higher perceptions of the Postal Service; their inclusion into the 2020 sample increased the percentages for every perceptions-related measure (see Table 5, below).[43] They were also more likely than Internet households to check a PO Box (see Table 6) and send personal letters and postcards (see Table 7).[44]

43 This difference between Internet and non-Internet households was statistically significant at the .05 level for the following perceptions-related measures: whether the respondent believed USPS provided excellent customer service, and whether the respondent held a favorable opinion of USPS.

44 This difference was statistically significant at the .05 level for checking PO Boxes and sending personal letters, and significant at the .1 level for sending postcards.

Table 5: Perceptions of the Postal Service

	2017	2018	2019	2020 Internet Households	2020 Full Sample
Respondents who agreed that:					
They enjoy sending mail	54.7%	56.1%	56.7%	**65.5% (+8.8)**	**66.4%**
USPS provides excellent customer service	65.7%	65.3%	68%	**75% (+7)**	**75.7%**
Mail is important	90.3%	87.7%	89.7%	**95.5% (+5.8)**	**95.5%**
They enjoy receiving mail	78.7%	76.2%	77%	**82.7% (+5.7)**	**83.1%**
USPS provides reliable products and services	77%	74.3%	76.9%	**81.3% (+4.4)**	**81.4%**
USPS provides secure products and services	76.7%	74.7%	77.4%	**77.9% (+0.5)**	**78.3%**
Respondents who had...					
A favorable opinion of USPS	Not asked	86.4%	86.9%	**90.2% (+3.3)**	**90.7%**

Note: This table expands upon Table 1 in the main body of the report.
Source: OIG.

Table 6: Use of Ancillary Products/Mail Services

	2017	2018	2019	2020 Internet Households	2020 Full Sample
Respondents who completed a purchase at the counter	60.5%	61%	64.8%	**69.2% (+4.4)**	**69.6%**
Respondents who put mail or packages into a collection box	43%	42.6%	45.2%	**47.1% (+1.9)**	**46.9%**
Respondents who picked up shipping or mailing materials	19.5%	22.9%	23.3%	**21.8% (-1.5)**	**21.8%**
Respondents who completed a purchase at a self-service kiosk	13.7%	15.9%	16.4%	**12.4% (-4)**	**12.6%**
Respondents who visited a post office in the past month	54.8%	52.1%	51.1%	**45% (-6.1)**	**44.8%**
Respondents who checked a Post Office Box	16.8%	19.9%	19.9%	**10.8% (-9.1)**	**11.3%**

Note: This table expands upon Table 2 in the main body of the report.
Source: OIG.

Table 7: Mail Behavior

Product	2017	2018	2019	2020 Internet Households	2020 Full Sample
Greeting Cards	24.6%	30.6%	30.9%	**19.8% (-11.1)**	**20%**
Personal Packages	27.9%	33.3%	34.7%	**17% (-17.7)**	**16.8%**
Personal Letters	39.2%	43.9%	45.1%	**17.8% (-27.3)**	**18.9%**
Postcards	32.5%	38.4%	40.6%	**10% (-30.6)**	**10.5%**
Business Packages	38.7%	48.1%	50.1%	**22.2% (-27.9)**	**22.2%**
Business Letters	41.9%	49%	49.7%	**20.1% (-29.6)**	**20.4%**

Note: This table expands upon Table 3 in the main body of the report.
Source: OIG.

Table 8: Ecommerce Behavior

	2017	2018	2019	2020 Internet Households	2020 Full Sample
Households Who Ordered Goods Online Once per Month or More	51.7%	54.1%	56.5%	**80.5% (+14)**	**78.9%**

Note: This table expands upon Figure 9 in the main body of the report.
Source: OIG.

Appendix E: Management's Comments

KELLY SIGMON
VICE PRESIDENT, CUSTOMER EXPERIENCE

UNITED STATES
POSTAL SERVICE

April 6, 2021

KELLY THRESHER
ACTING DIRECTOR, RISC

SUBJECT: Customer Perceptions of the U.S. Postal Service During the COVID-19 Pandemic

(Project Number 2020RISC016)

Thank you for providing the Postal Service with the opportunity to review and comment on the subject white paper.

The Postal Service has no concerns regarding the conclusions reached in this white paper.

Kelly M. Sigmon

Kelly M. Sigmon

cc: [redacted]

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