NMHC/ Kingsley Apartment Resident Package Delivery Survey
FedEx

6.5 Billion Packages

ups

EARTH

7.1 Billion People
E-COMMERCE
OMNI-CHANNEL
RETAIL SALES
FREE SHIPPING!
E-commerce sales

$264.28 billion

$250 billion

200

150

100

50

0

2003 '05 '07 '09 '11 '13

✓ E-Commerce currently represents only 6% of all retail sales

✓ Huge potential for growth

✓ Expect even more packages
Amazon represents 28% of all E-Commerce sales
Strongly agree
Agree
Disagree
Next Steps
NMHC / Kingsley 2014 Package Delivery Study

Study Overview
Respondent pool makeup

- 0-49 units: 7%
- 50-99 units: 7%
- 100-199 units: 24%
- 200-299 units: 30%
- 300-499 units: 30%
- 500+ units: 7%

- Other / multiple types: 9%
- High-rise (9+ stories): 3%
- Mid-rise (5-8 stories): 7%
- Garden (1-4 stories): 68%
Strong response counts from across the U.S.
Most communities accept packages on behalf of residents

Does your management office accept packages?

- Yes: 88%
- No: 12%

Mid-rise: 94%
Garden: 89%
High-rise: 82%
Growth in package volume most wide spread in TX markets

- Austin: 73%
- Houston: 72%
- Dallas/Forth Worth: 71%
- Seattle: 70%
- Atlanta: 64%
- Raleigh: 64%
- Miami: 63%
- San Francisco: 62%
- Phoenix: 62%
- Los Angeles: 61%
- Portland: 60%
- Boston: 60%
- Denver: 60%
- DC/Baltimore: 60%
- New York: 59%
- Las Vegas: 49%
- Philadelphia: 48%
What Happens to Packages
Mid-rise and high-rise management staff deliver packages

Does management staff deliver packages to the residents' doors?
Few carriers deliver to residents’ door in high-rise buildings

Do package carriers deliver to the residents' doors?

Yes 77%

- Garden: 86%
- Mid-rise: 52%
- High-rise: 20%
When carrier attempts to deliver, but resident is not home...

- 70% Deliver to management office
- 19% Leave package at door
- 5% Return package back to carrier hub
- 5% Deliver to package locker

Bar chart showing:
- Deliver to management office:
  - Garden: 73%
  - Mid-rise: 70%
  - High-rise: 56%
- Leave package at door:
  - Garden: 16%
  - Mid-rise: 20%
  - High-rise: 26%
Security of packages left at door main concern of residents

Residents are concerned about...

- The security of having a package left at their door. (67% Garden, 68% Mid-rise, 58% High-rise)
- Package carriers being given access to the building. (7% Garden, 14% Mid-rise, 18% High-rise)
- Packages being delivered to the wrong apartment. (34% Garden, 32% Mid-rise, 35% High-rise)
Carriers alert residents directly one-third of the time

- Carrier notifies residents: 33%
- Phone call: 26%
- Text or email to the resident: 26%
- Electronic check-in system: 24%
- Paper notice on resident door: 18%
- Management office delivers packages: 6%
Automated notification least likely at garden communities

- Garden: 15% Automated System, 45% Any Manual Methods
- Mid-rise: 45% Automated System, 43% Any Manual Methods
- High-rise: 57% Automated System, 35% Any Manual Methods
Holiday vs. Non-Holiday
Staff time dedicated to packages increases during holidays

- Non-Holiday: 101 packages
  - 1-5 hours: 8%
  - 6-10 hours: 14%
  - 11+ hours: 8%
- Holiday: 325 packages
  - 1-5 hours: 78%
  - 6-10 hours: 19%
  - 11+ hours: 18%

Receive Over 300 Packages

Staff Hours

2014 NMHC OpTech Conference & Exposition (Multifamily Operations & Technology)
High-rise communities more likely to spend 11+ hours on packages

Percent of Communities Spending 11+ Hours per Week on Packages

- **High-rise**
  - Non-Holiday: 30%
  - Holiday: 46%

- **Mid-rise**
  - Non-Holiday: 16%
  - Holiday: 32%

- **Garden**
  - Non-Holiday: 5%
  - Holiday: 13%
Holiday package increase is greatest at garden communities

Percent Change in Package Volume and Staff Hours During Holiday Periods

- Garden: % CHG Volume = 84%, % CHG Staff Hours = 38%
- Mid-rise: % CHG Volume = 60%, % CHG Staff Hours = 44%
- High-rise: % CHG Volume = 41%, % CHG Staff Hours = 36%
Burden on staff greatest for medium-sized communities

Ratio of Packages to Staff Members

- Non-holiday
- Holiday

<table>
<thead>
<tr>
<th>Units</th>
<th>Non-holiday</th>
<th>Holiday</th>
</tr>
</thead>
<tbody>
<tr>
<td>0-49 units</td>
<td>12.5</td>
<td>8.8</td>
</tr>
<tr>
<td>50-99 units</td>
<td>14.6</td>
<td>17.4</td>
</tr>
<tr>
<td>100-199 units</td>
<td>21.8</td>
<td>29.9</td>
</tr>
<tr>
<td>200-299 units</td>
<td>20.7</td>
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<td>300-499 units</td>
<td>19.1</td>
<td>33.2</td>
</tr>
<tr>
<td>500+ units</td>
<td>16.7</td>
<td>24.3</td>
</tr>
</tbody>
</table>
Ratio of packages to staff nearly doubles for garden

- High-rise: Non-holiday: 32.4, Holiday: 45.5
- Mid-rise: Non-holiday: 29.8, Holiday: 47.6
Technology Adoption
Garden communities most likely to have package lockers

Does your community currently utilize package lockers?

- **No**: 84%
- **Yes**: 9%
- **Considering it**: 7%

**Bar Chart**

- **Garden**: 10%
- **Mid-rise**: 7%
- **High-rise**: 2%
Package management software more common than lockers

Does your community currently utilize package management software?

Considering it

- Yes: 24%
- No: 70%

Bar graph showing:
- High-rise: 61%
- Mid-rise: 47%
- Garden: 17%
Most communities have fewer than 11 package lockers

Number of Individual Package Lockers

- 5 or fewer: 27%
- Between 6 and 10: 37%
- More than 11: 36%

Package Locker Capacity

- Sufficient year-round: 45%
- Not sufficient: 31%
- Not during high-volume periods: 24%
Less than half say package lockers are sufficient year-round.