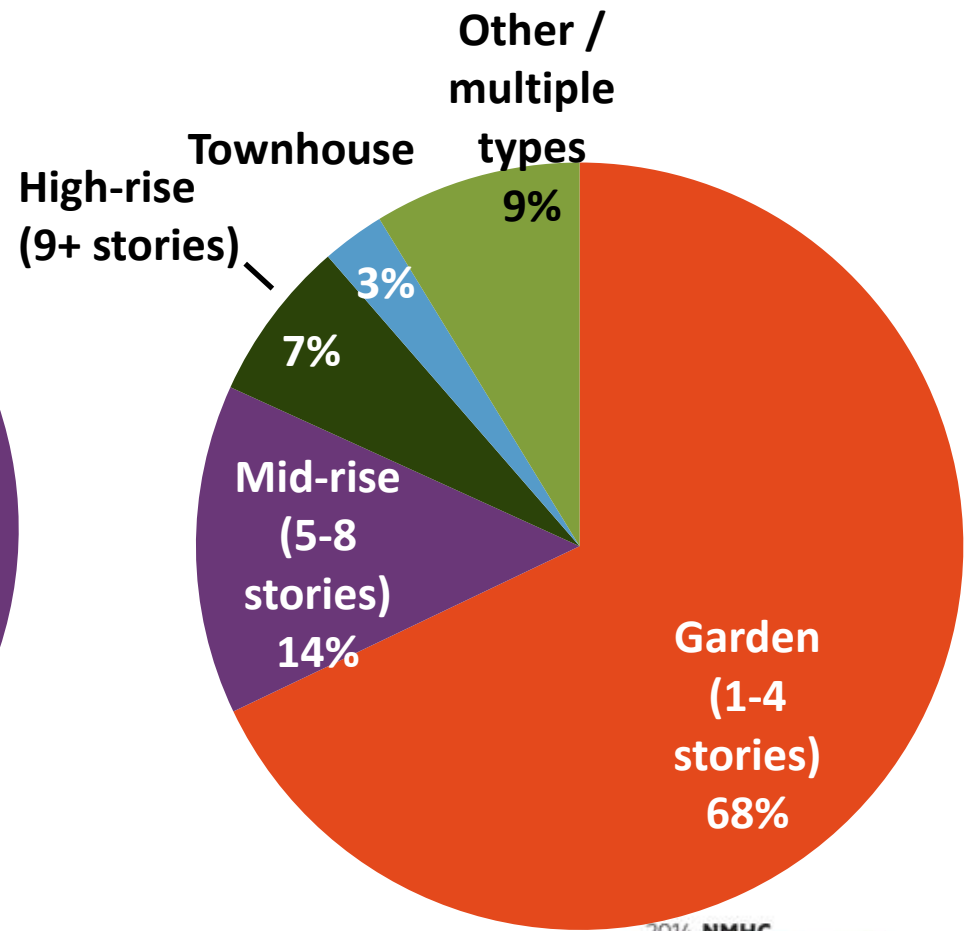
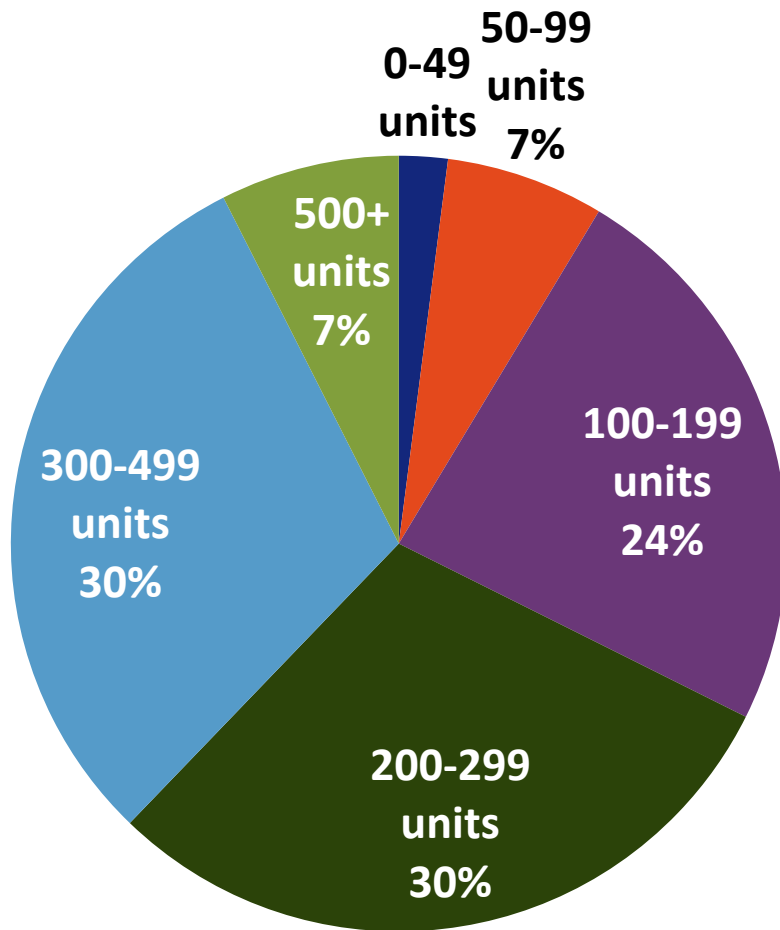




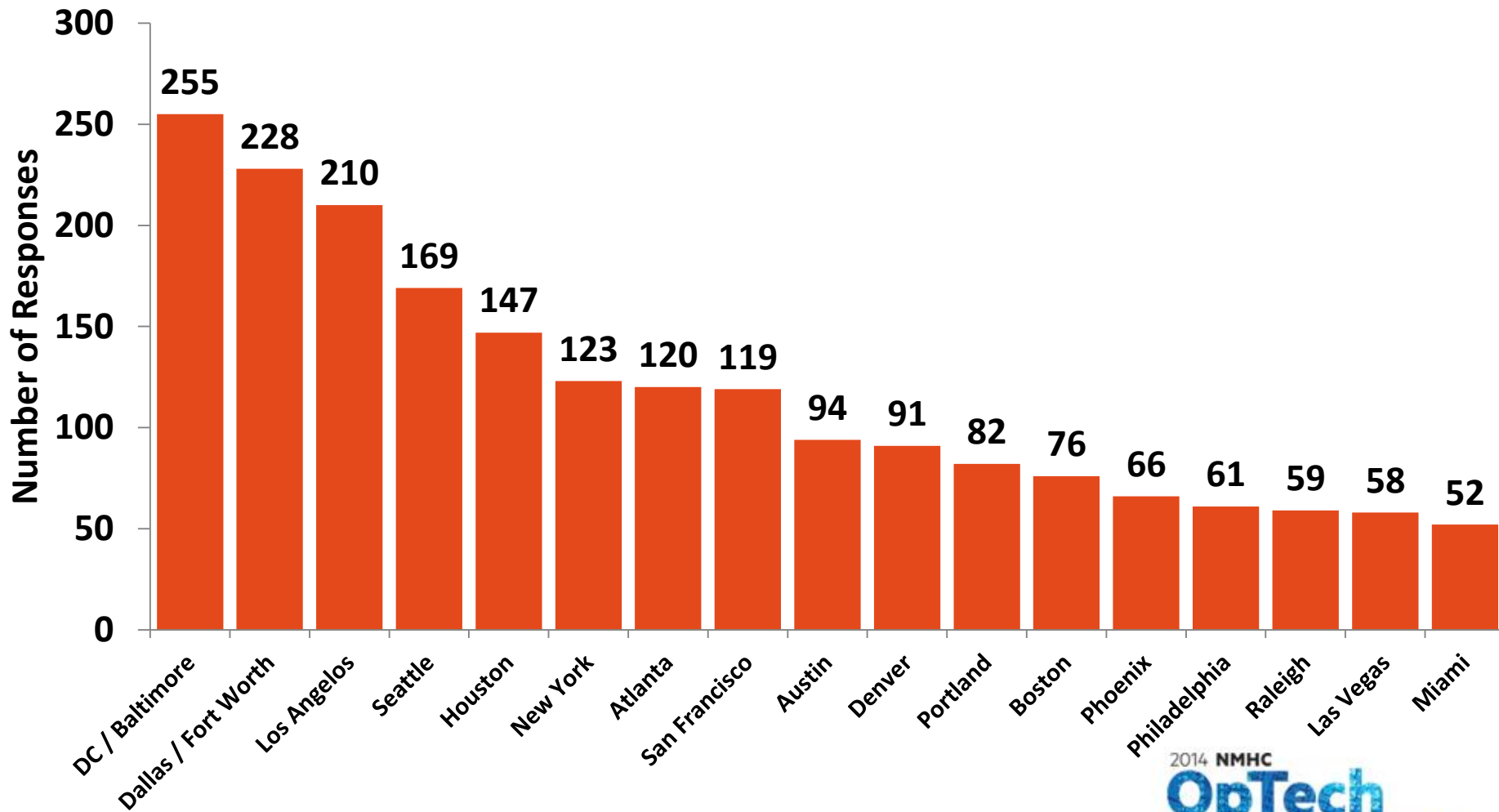
NMHC / Kingsley 2014
Package Delivery Study

Study Overview

Respondent pool makeup

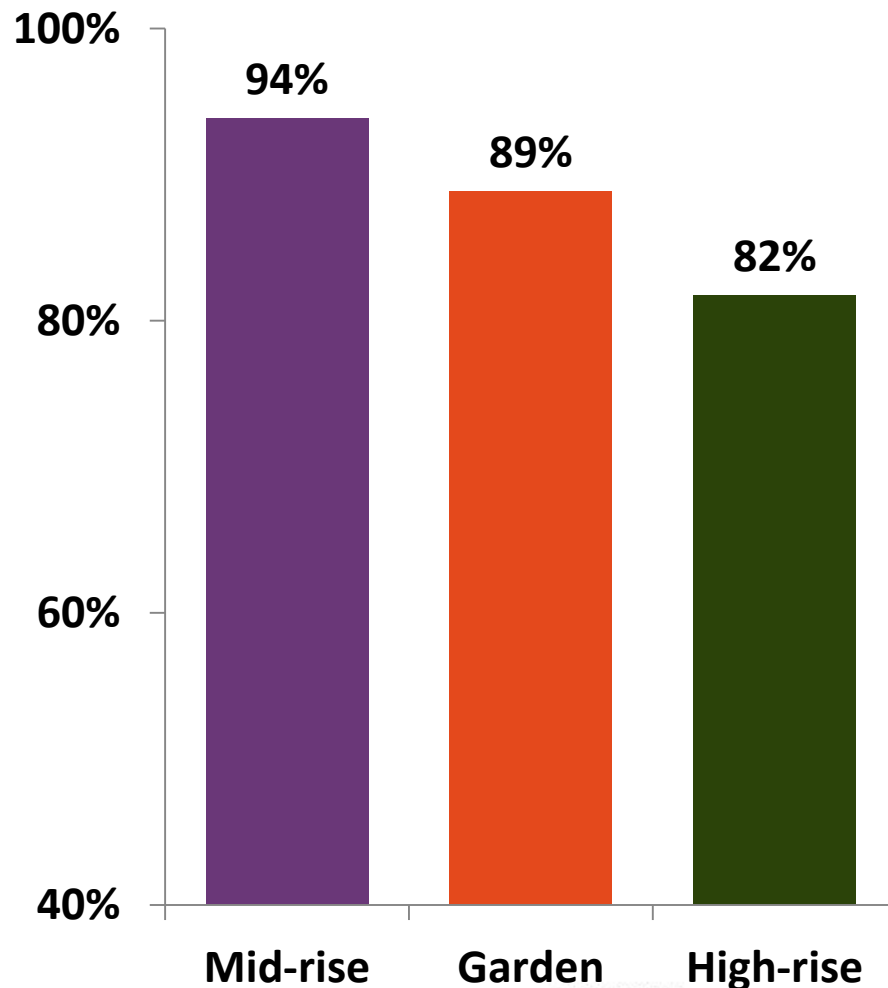
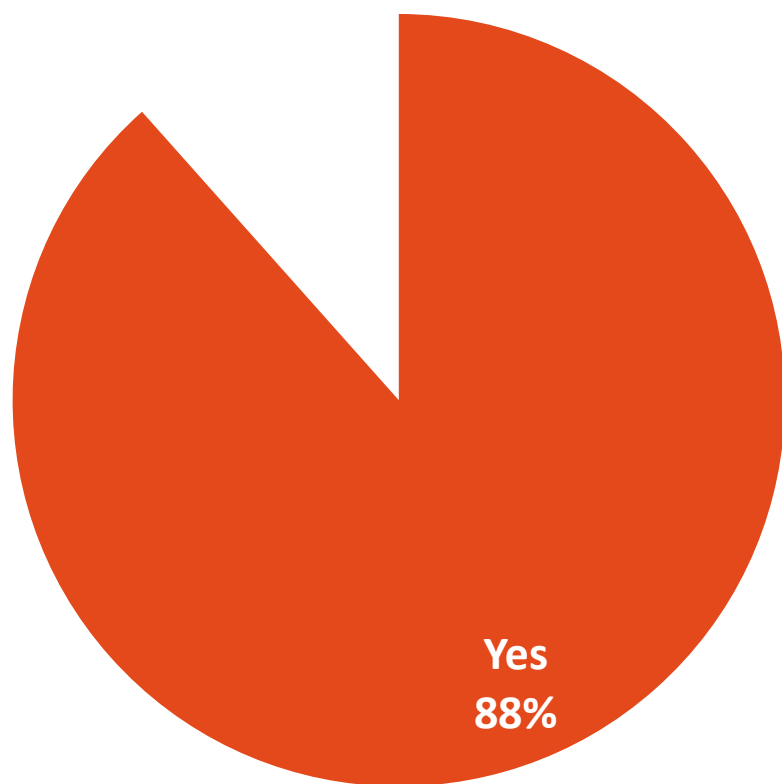


Strong response counts from across the U.S.

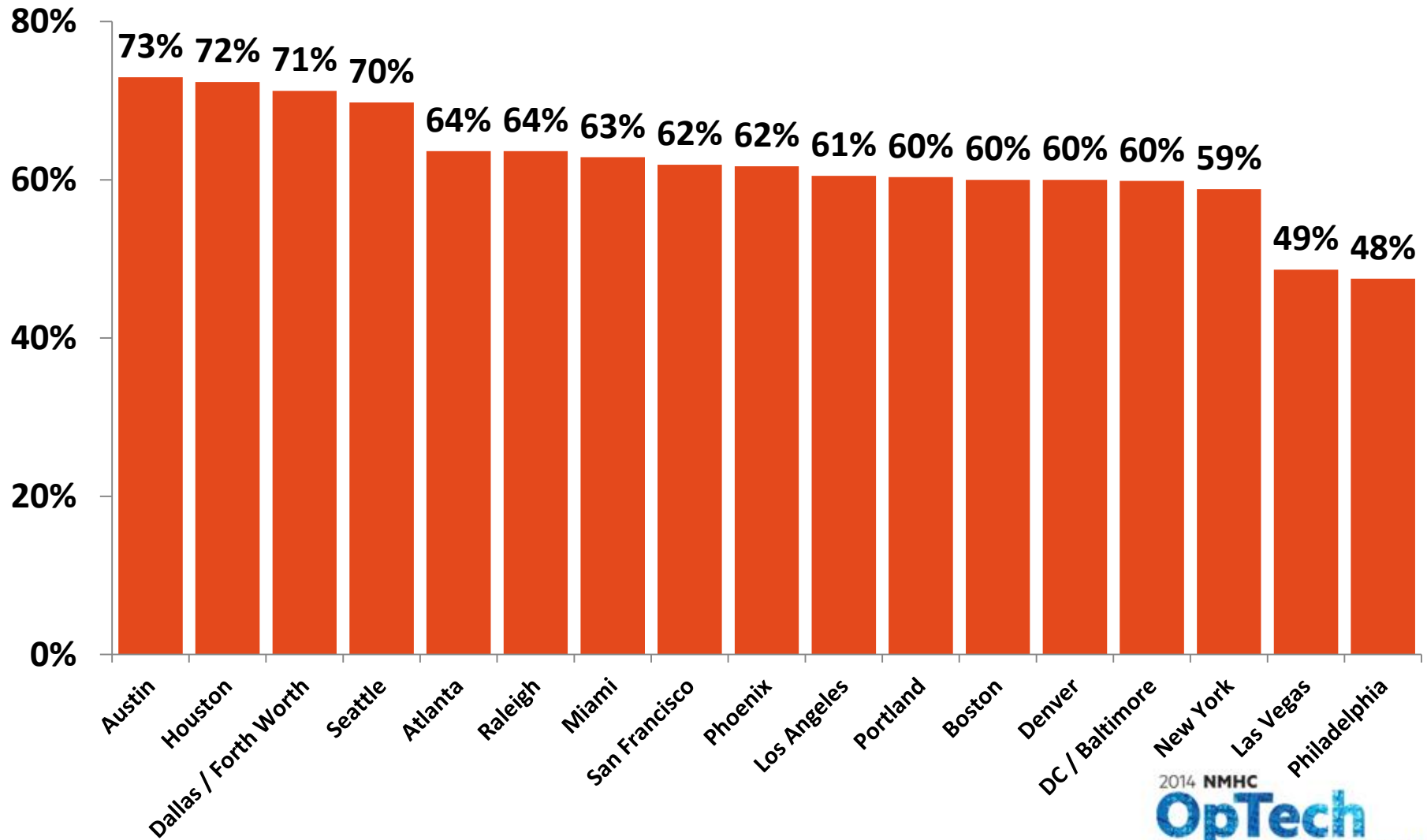


Most communities accept packages on behalf of residents

Does your management office accept packages?



Growth in package volume most wide spread in TX markets

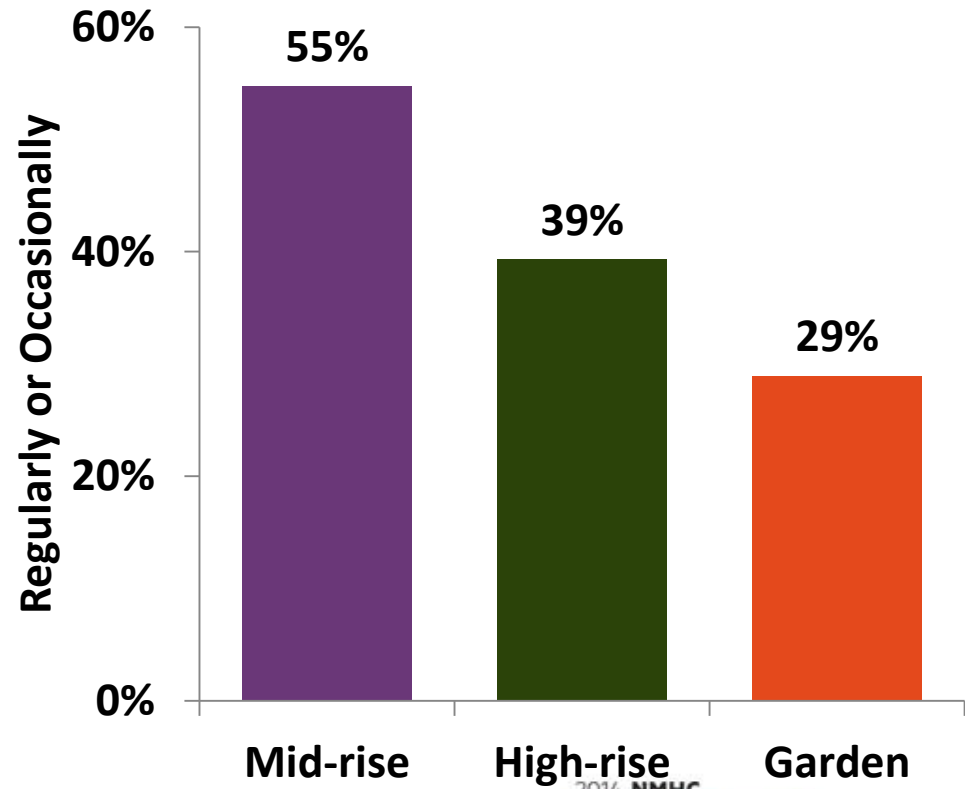
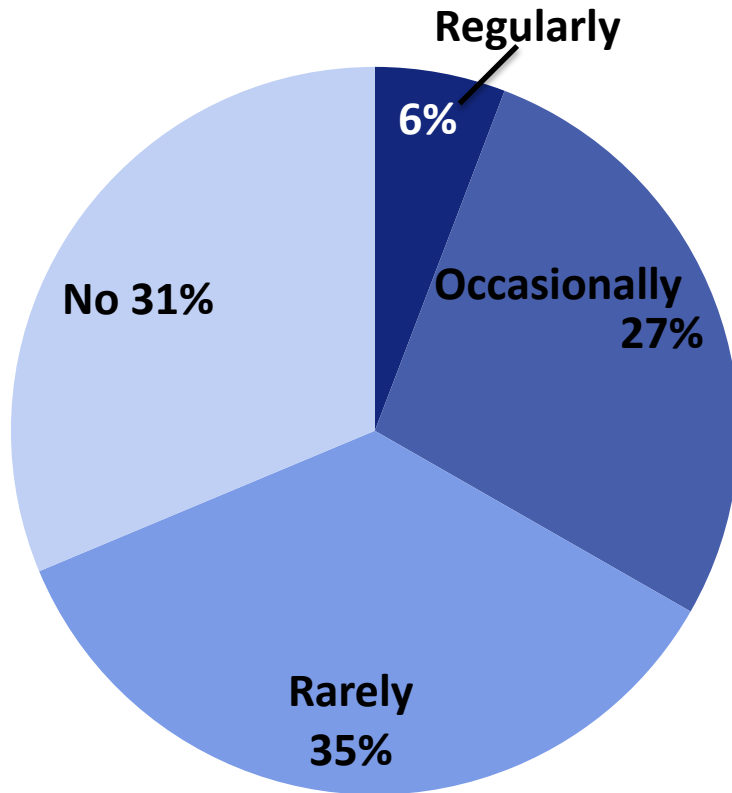


What Happens to Packages



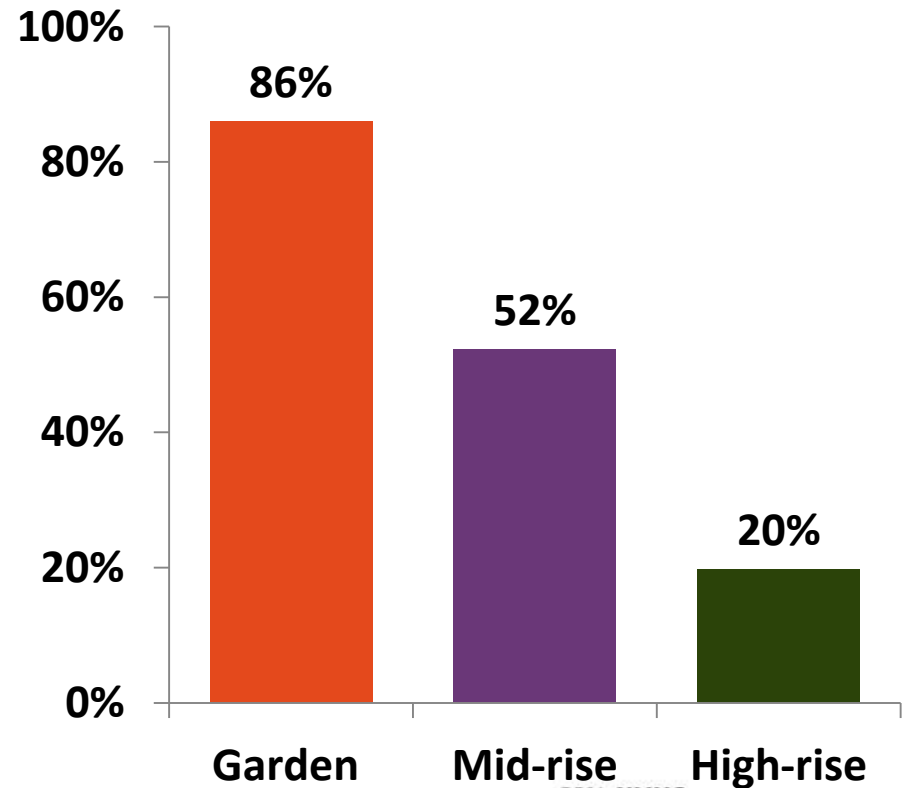
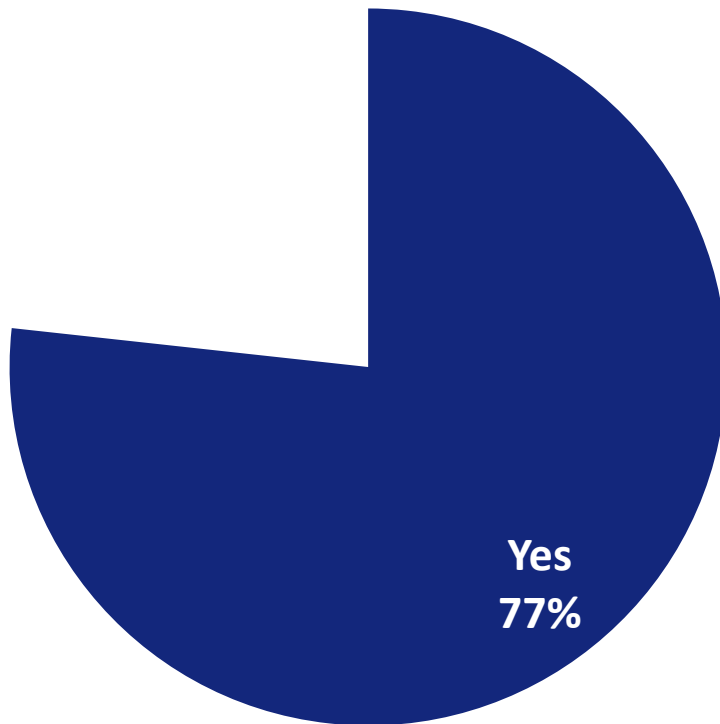
Mid-rise and high-rise management staff deliver packages

Does management staff deliver packages to the residents' doors?

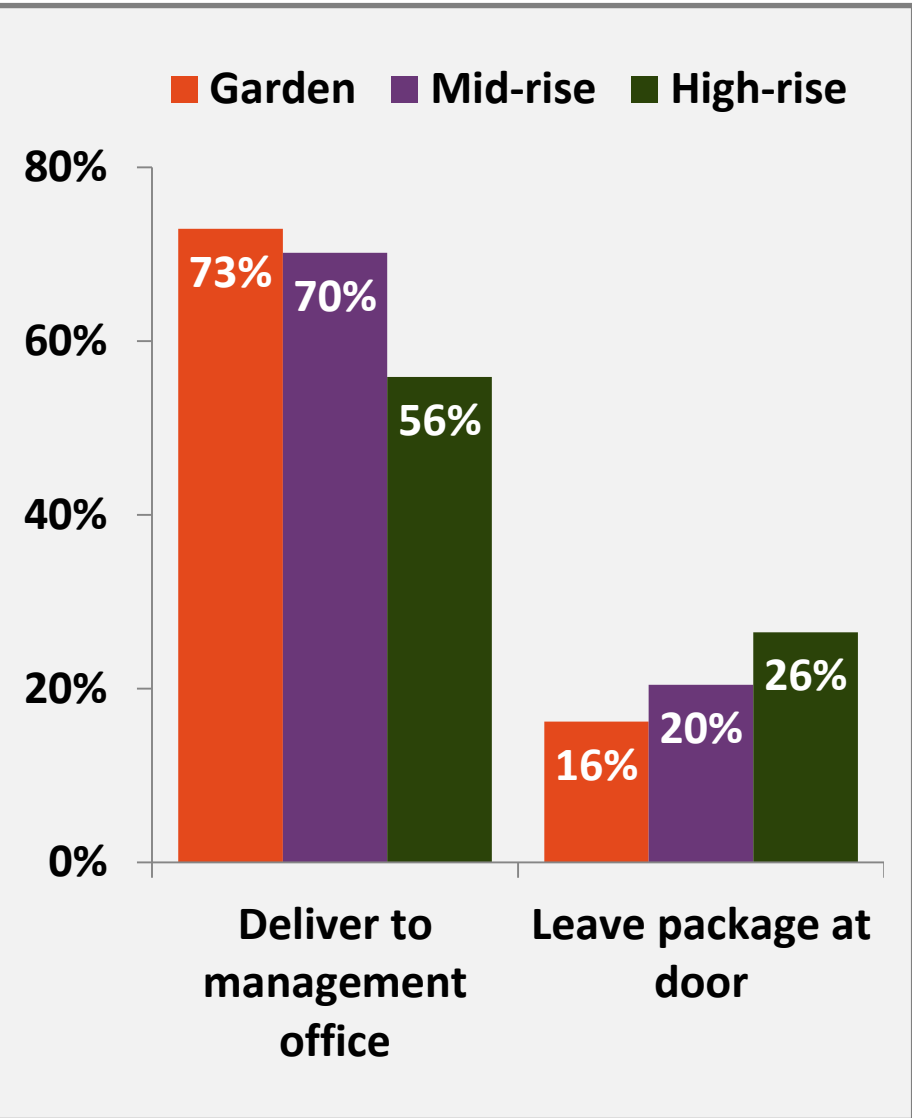
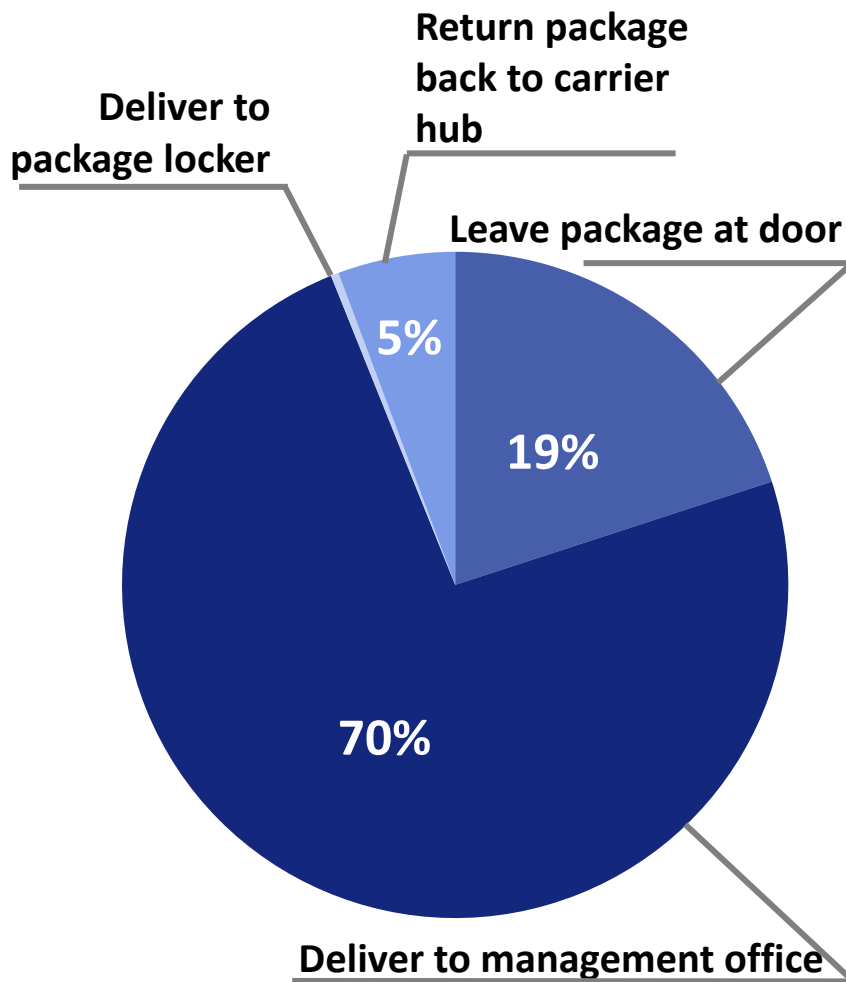


Few carriers deliver to residents' door in high-rise buildings

Do package carriers deliver to the residents' doors?



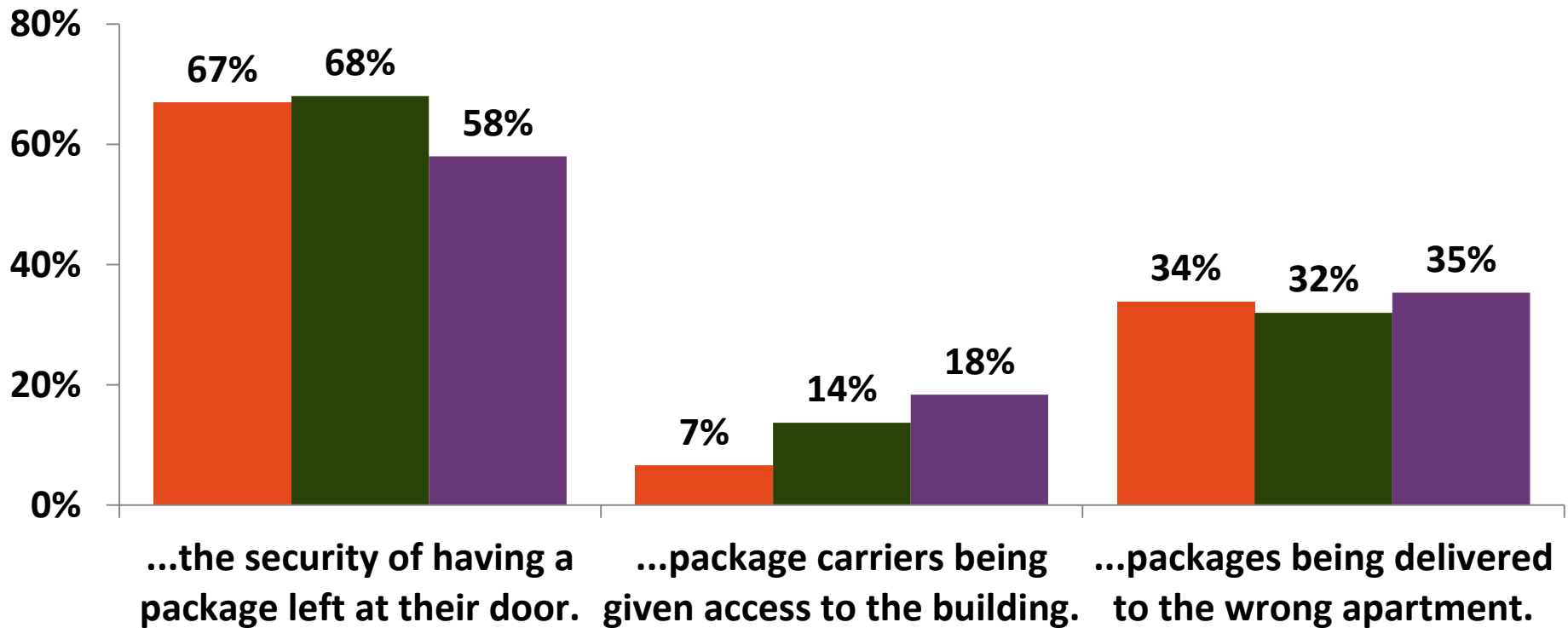
When carrier attempts to deliver, but resident is not home...



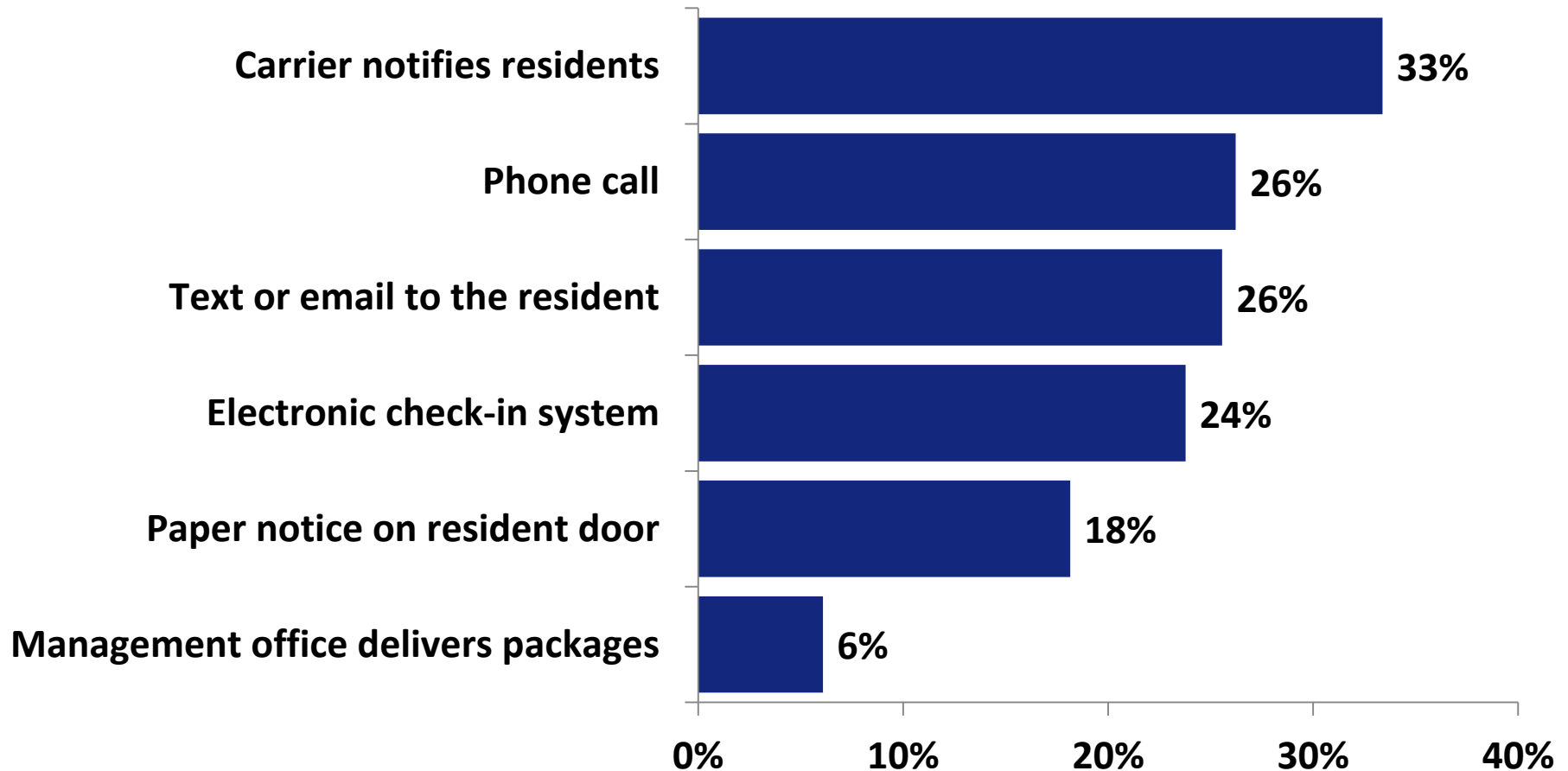
Security of packages left at door main concern of residents

Residents are concerned about...

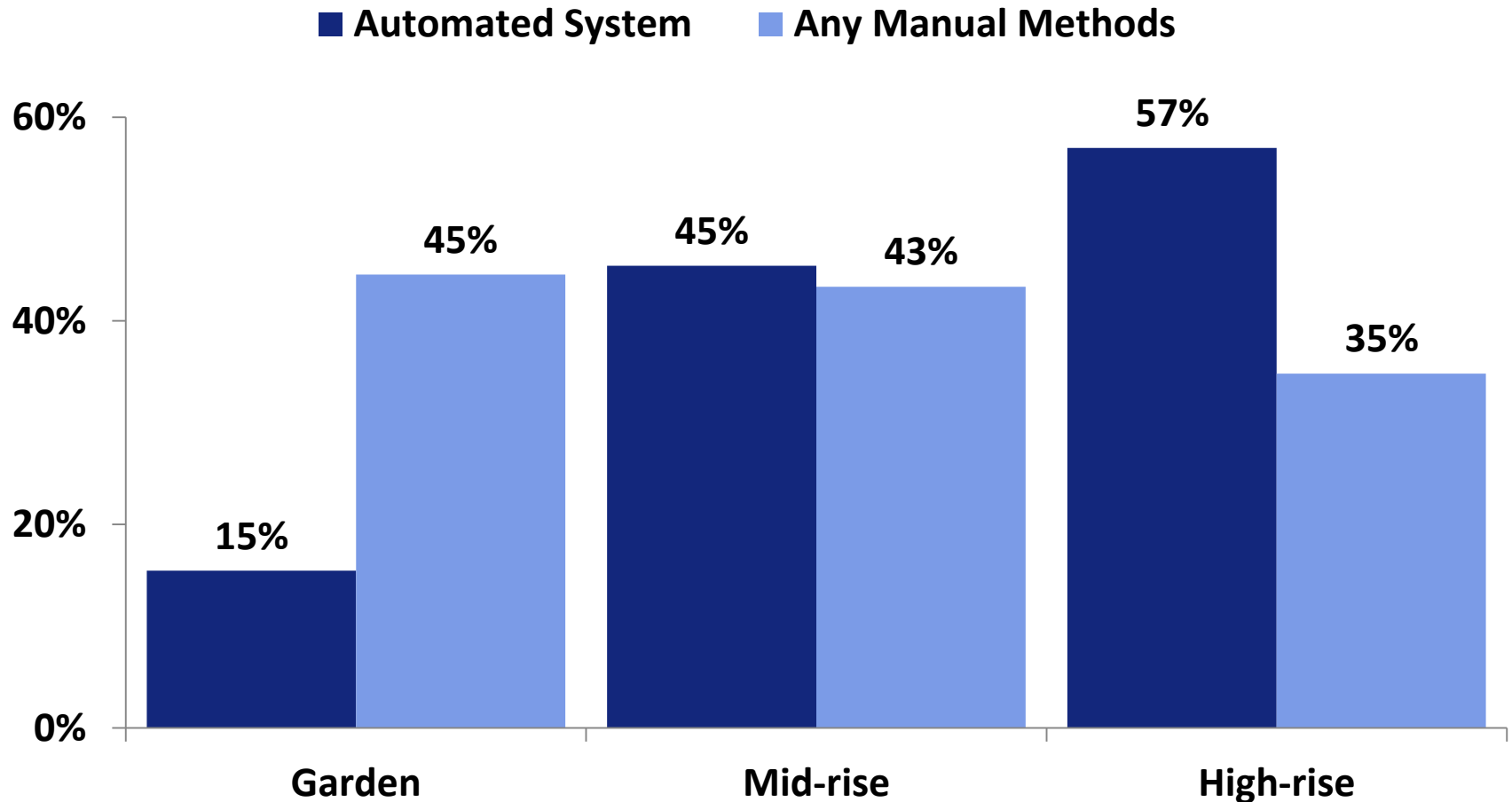
■ Garden ■ Mid-rise ■ High-rise



Carriers alert residents directly one-third of the time



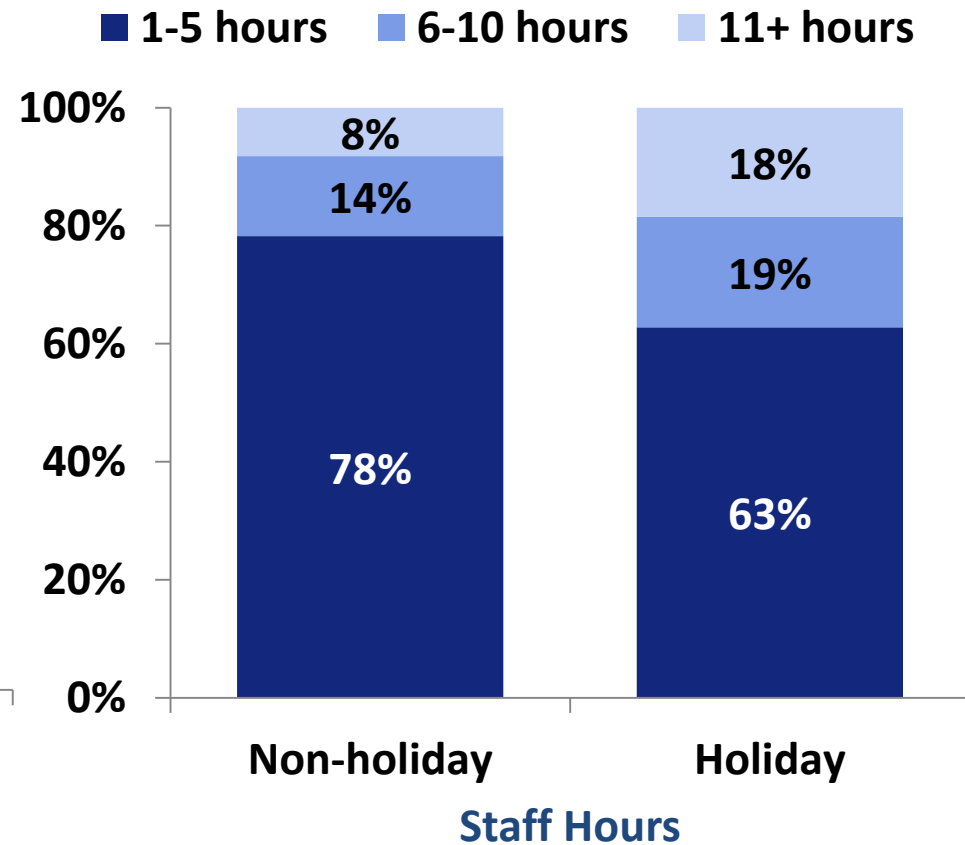
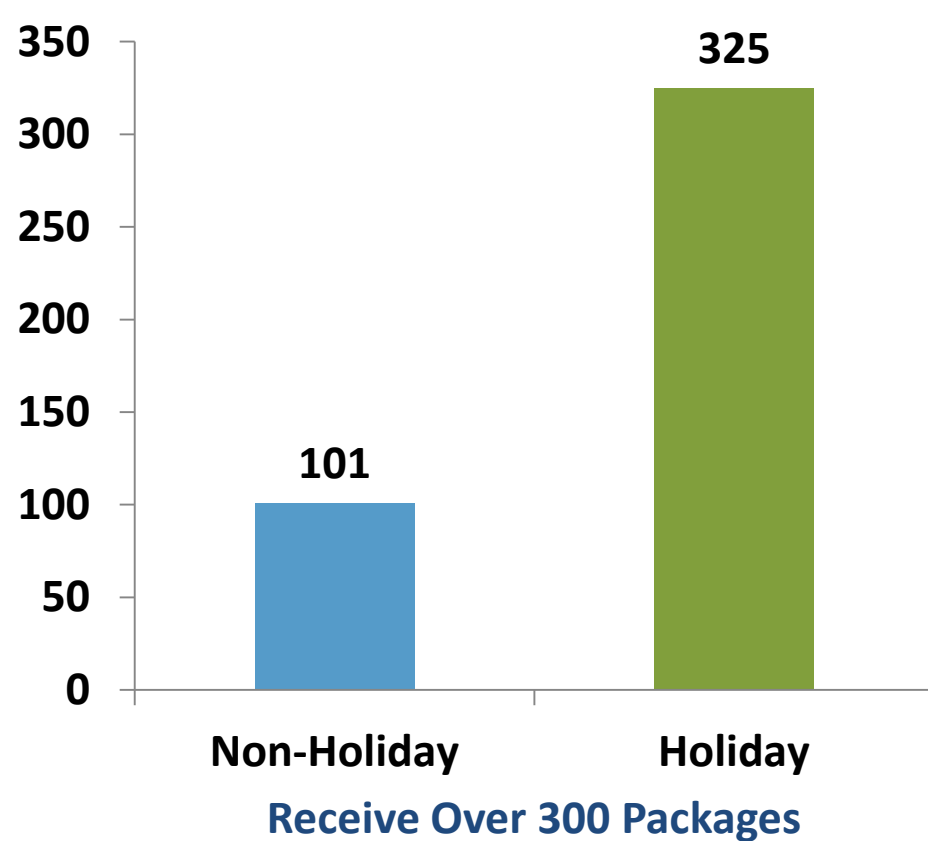
Automated notification least likely at garden communities



Holiday vs. Non-Holiday



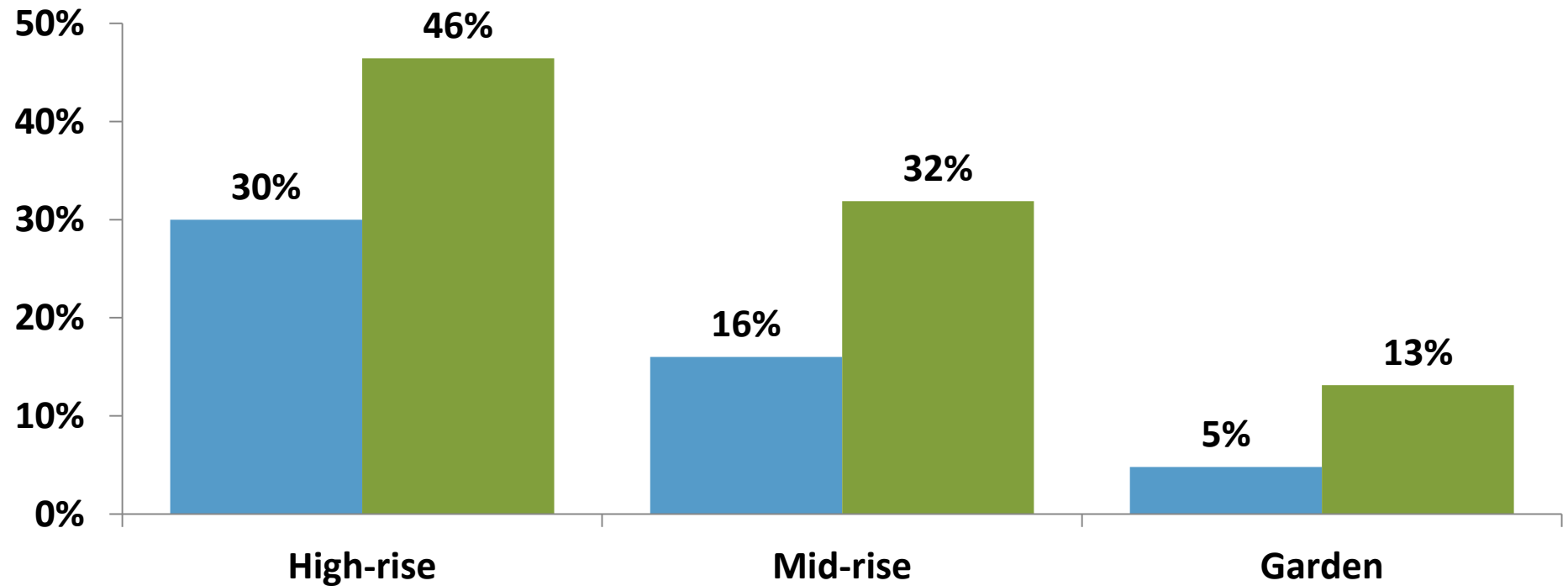
Staff time dedicated to packages increases during holidays



High-rise communities more likely to spend 11+ hours on packages

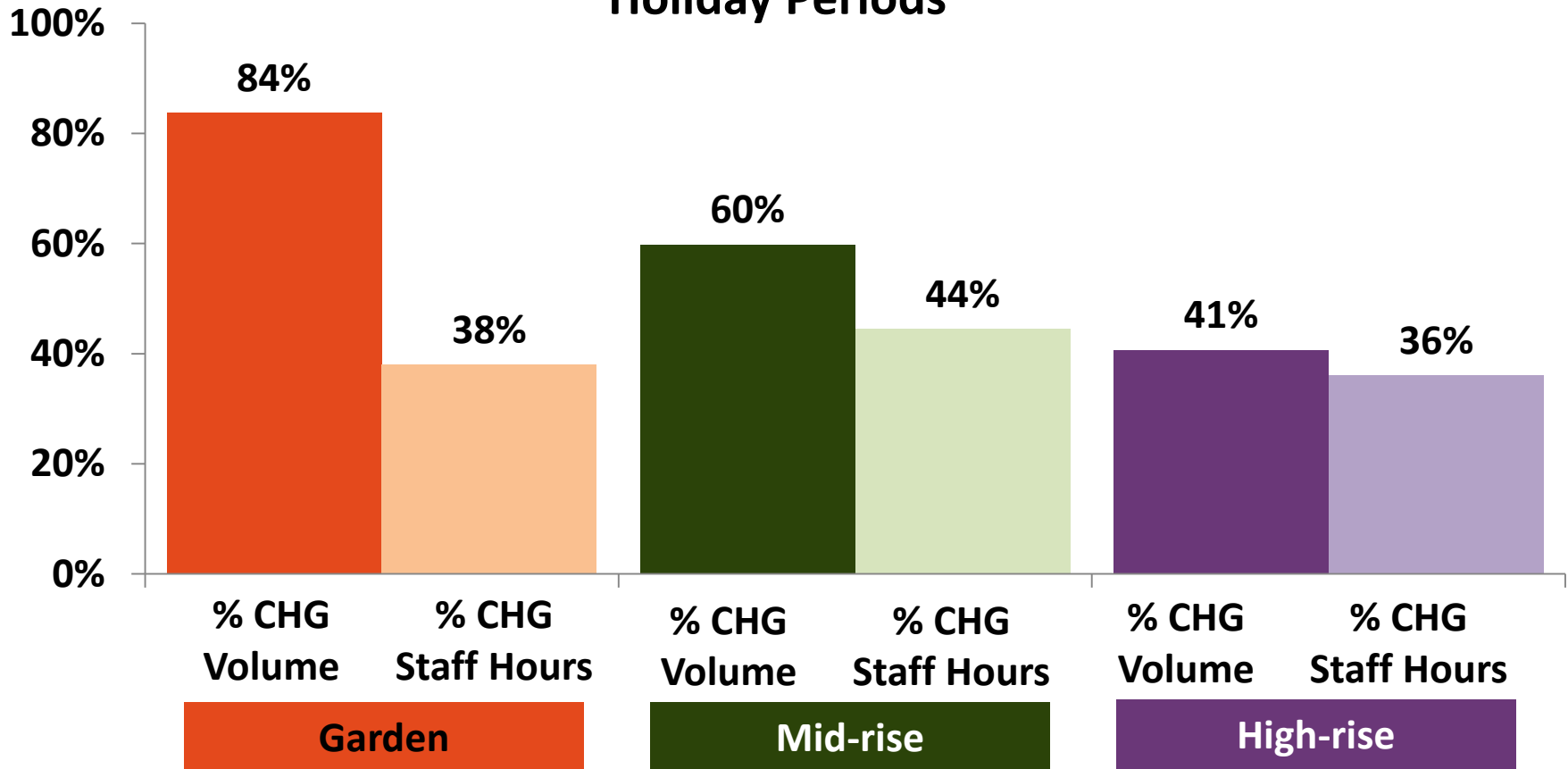
Percent of Communities Spending 11+ Hours per Week on Packages

■ Non-Holiday ■ Holiday



Holiday package increase is greatest at garden communities

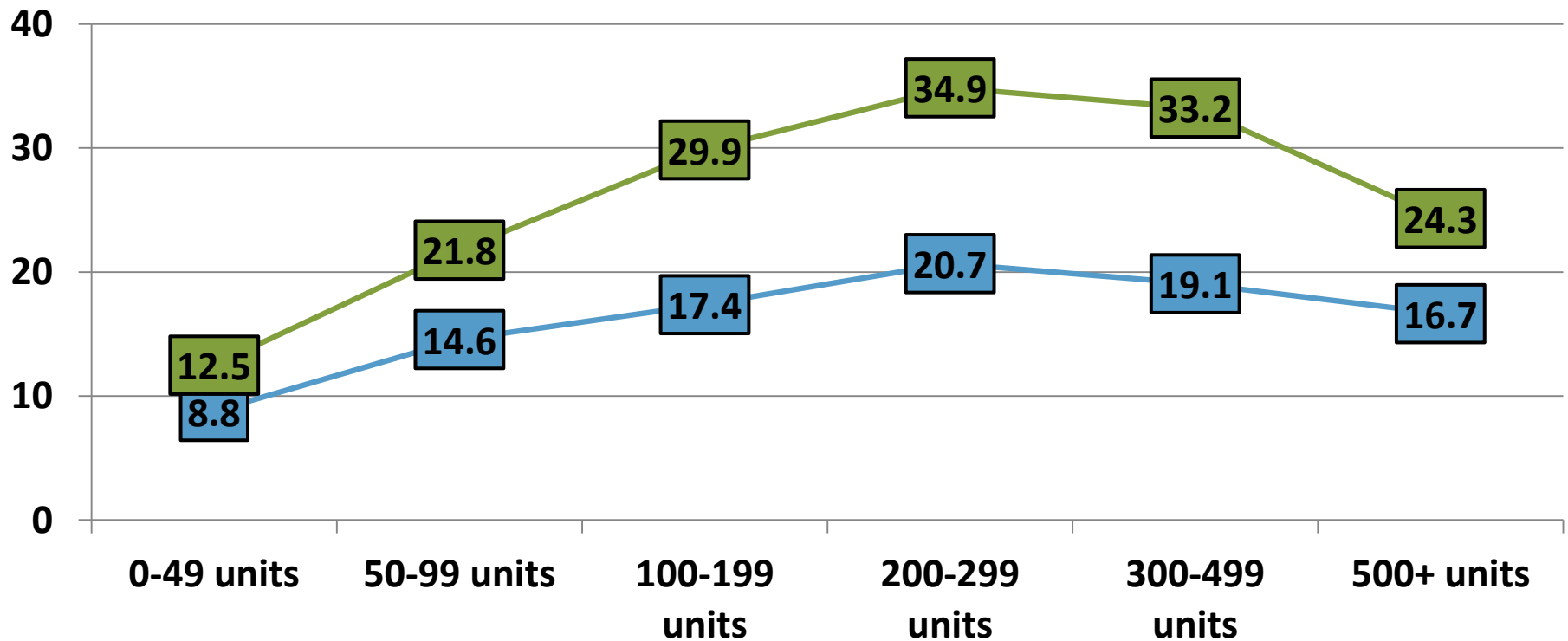
Percent Change in Package Volume and Staff Hours During Holiday Periods



Burden on staff greatest for medium-sized communities

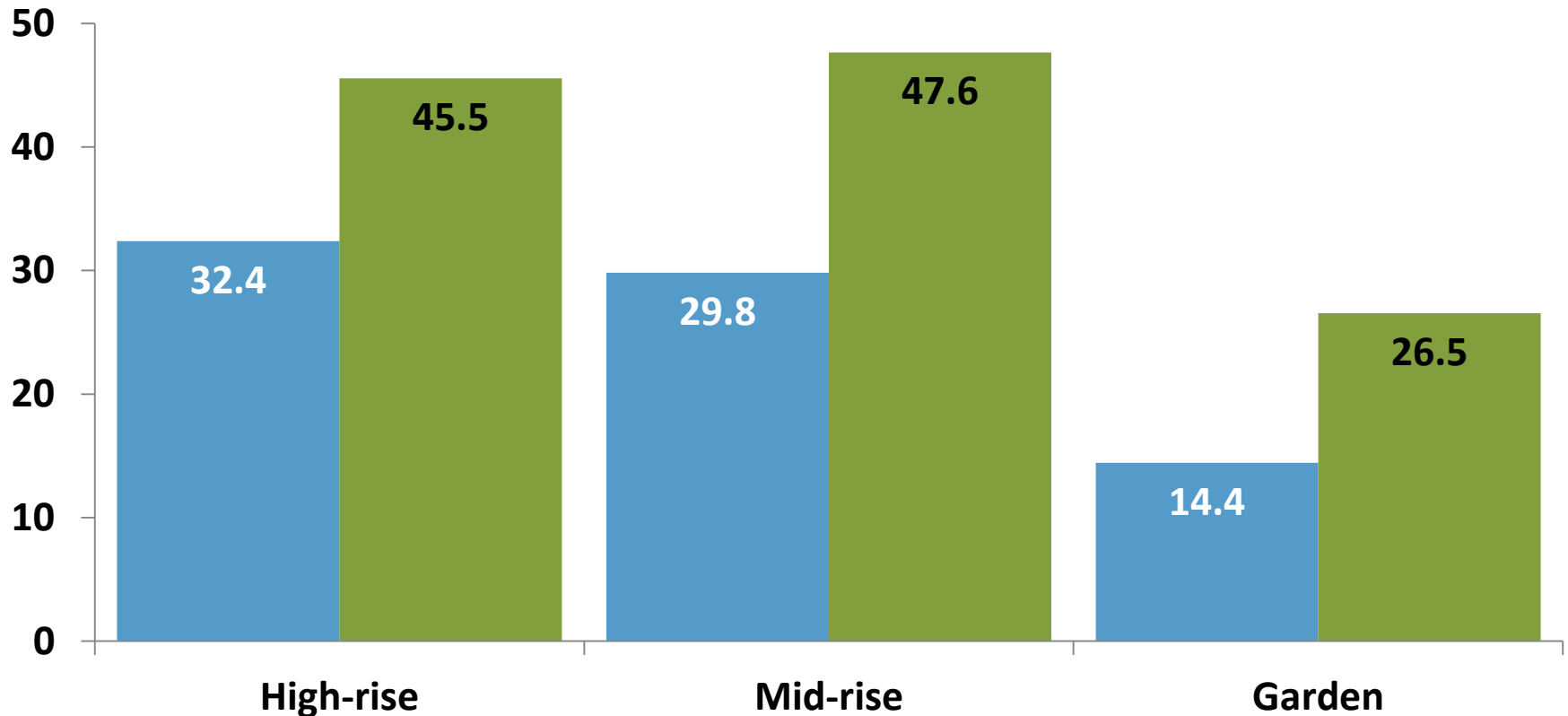
Ratio of Packages to Staff Members

— Non-holiday — Holiday



Ratio of packages to staff nearly doubles for garden

■ Non-holiday ■ Holiday

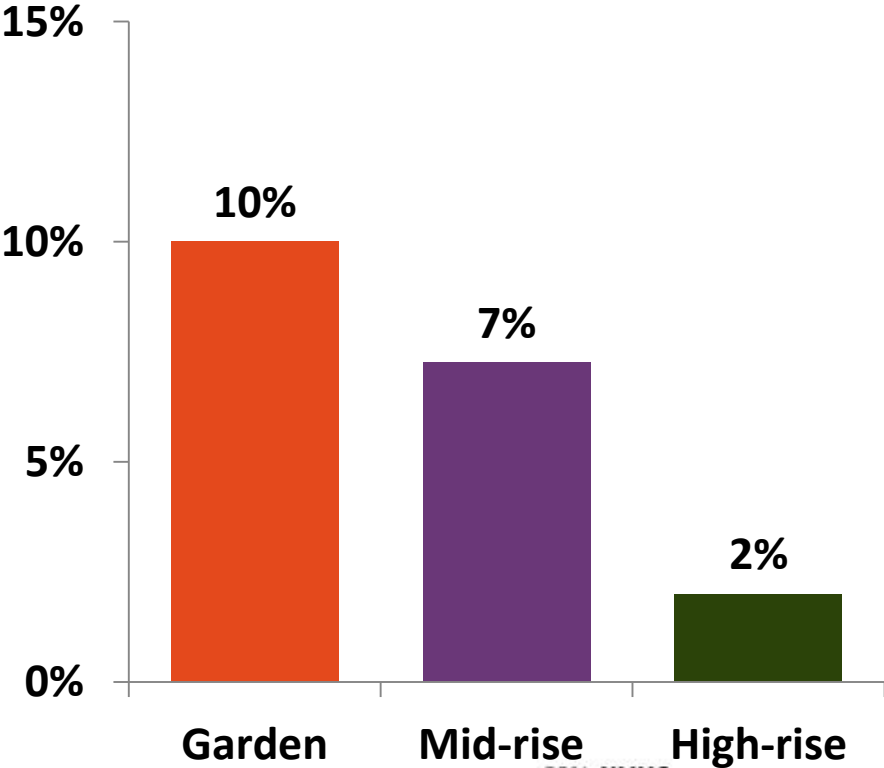
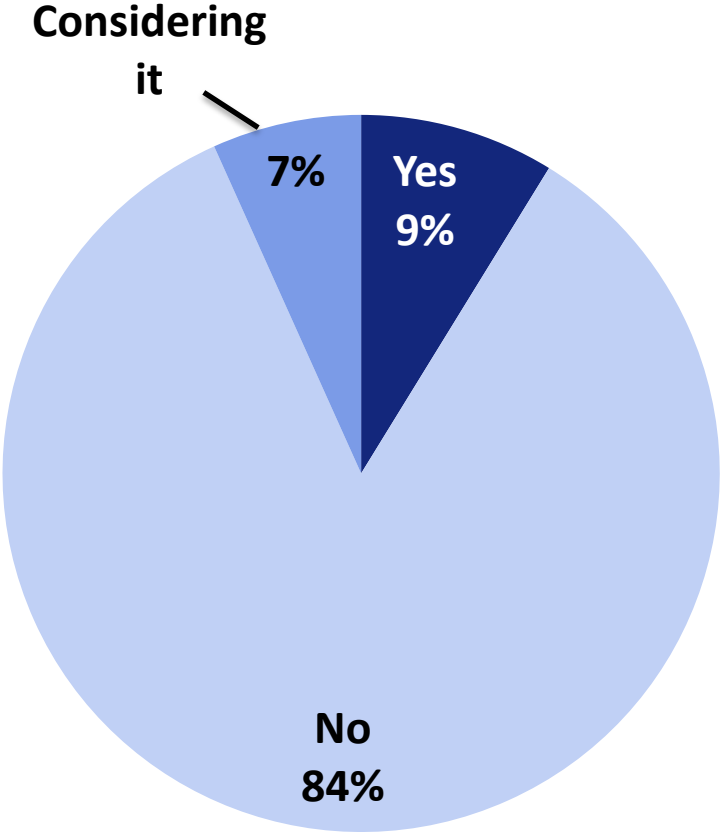




Technology Adoption

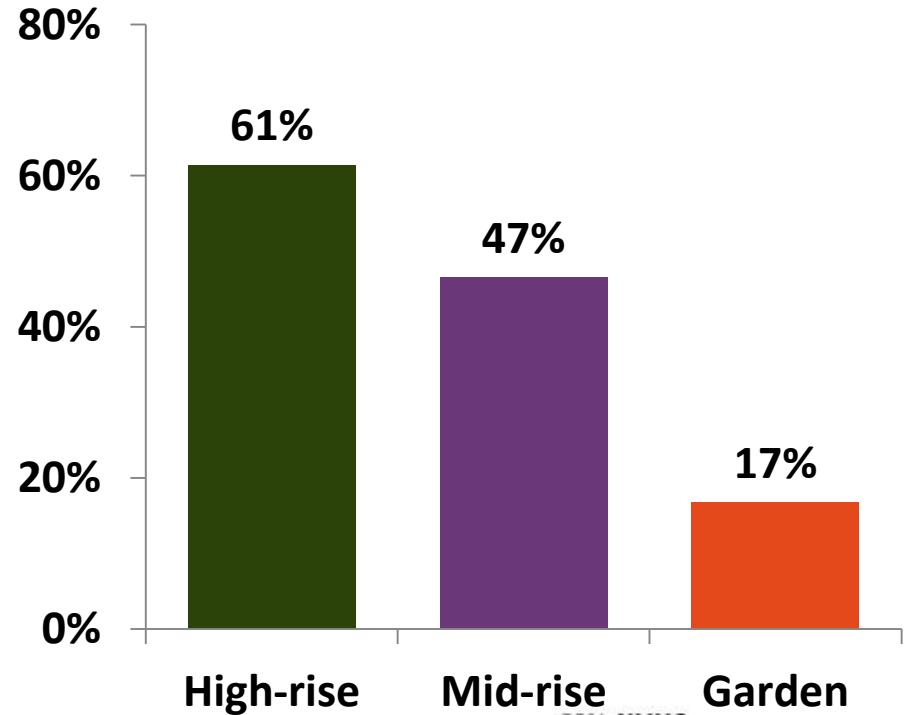
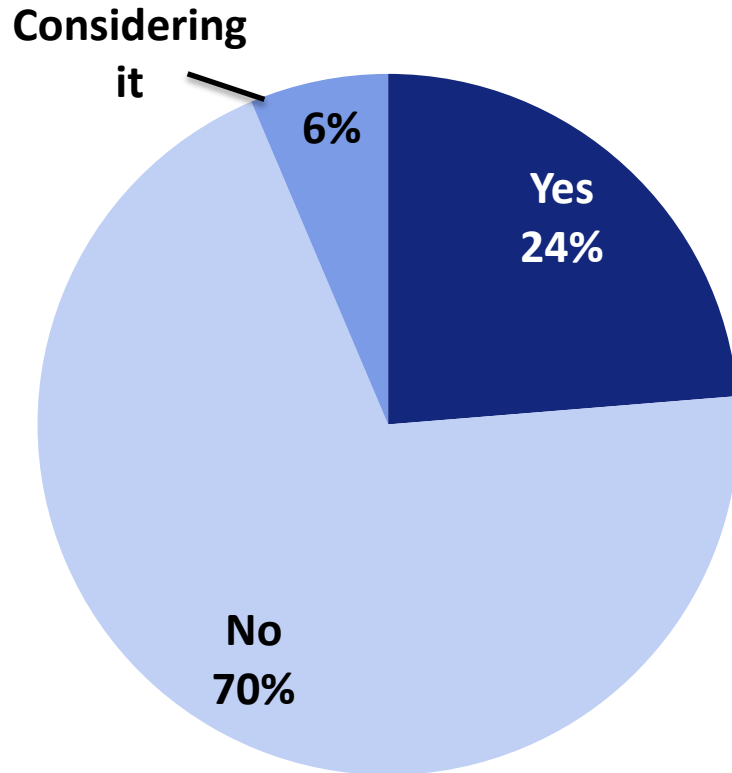
Garden communities most likely to have package lockers

Does your community currently utilize package lockers?



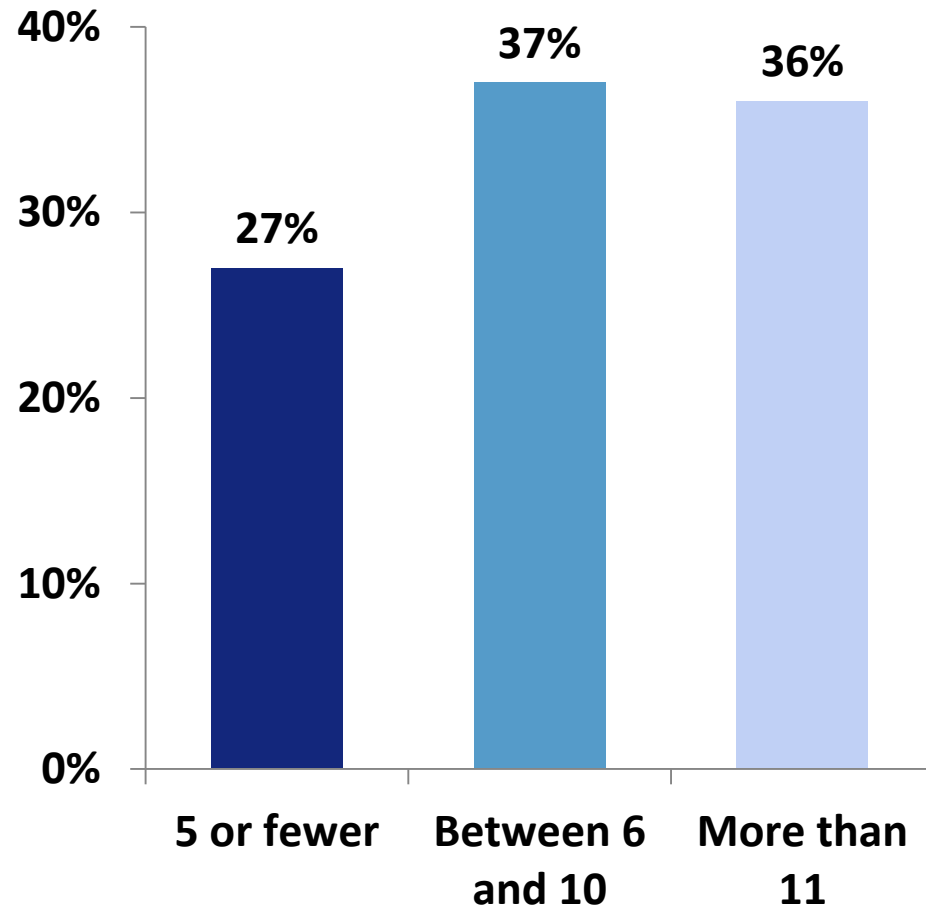
Package management software more common than lockers

Does your community currently utilize package management software?

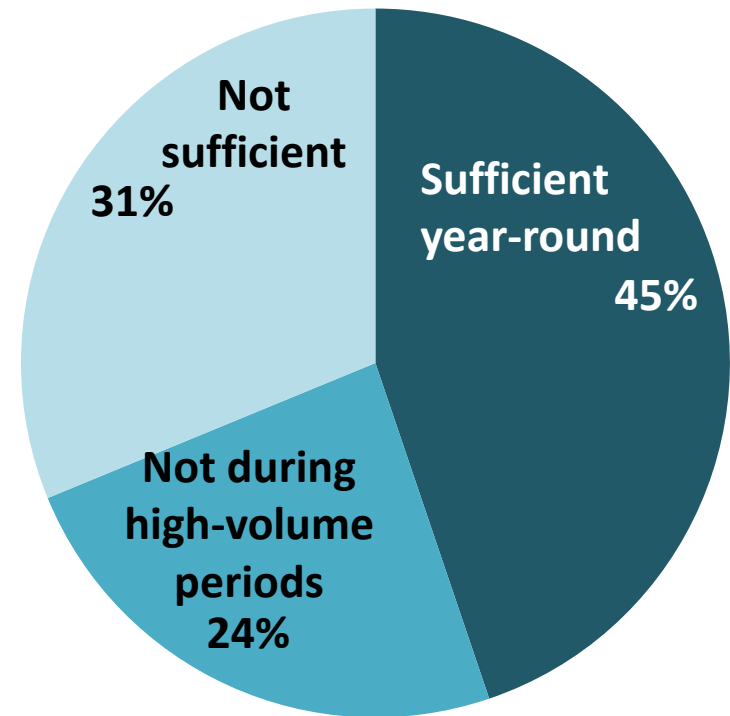


Most communities have fewer than 11 package lockers

Number of Individual Package Lockers



Package Locker Capacity



Less than half say package lockers are sufficient year-round

