

# Special Delivery: The 2018 NMHC Kingsley Package Delivery Survey Results

## Speakers:

**Philip Boatwright**, The NRP Group

**John Falco**, Kingsley Associates

**Brian Ericson**, Cortland

**Steve Hallsey**, Wood Partners

**Regan Hartley**, Package Concierge

**Margette Hepfner**, Lincoln Property Company

**Eric Lytle**, Kingsley Associates

**Chris Moreno**, Luxer One

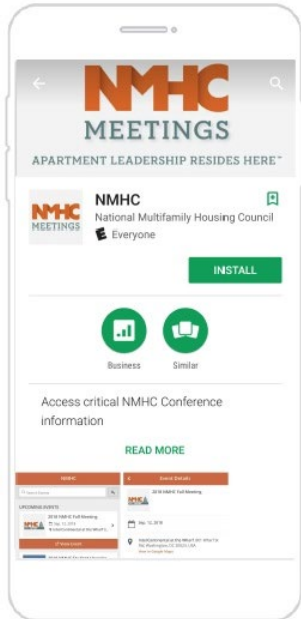
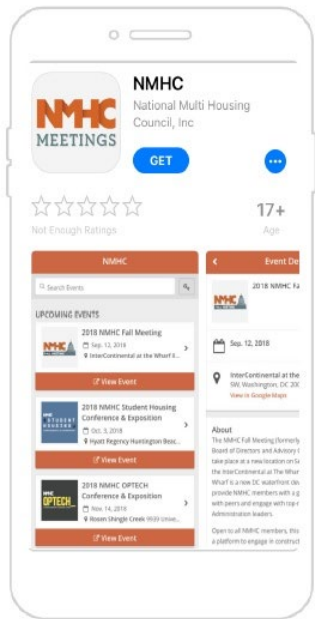
**Kevin Thompson**, Carlisle Properties

**Lori Torres**, Parcel Pending

**Kari Warren**, Kairoi Management



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# 2018 NMHC/Kingsley Package Delivery Survey

OPTECH 2018

November 14<sup>th</sup>, 2018

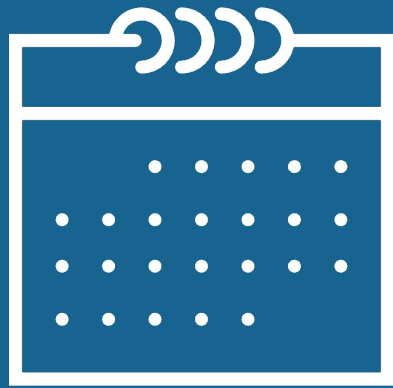


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# Survey Methodology

September  
2018



29  
firms



2,096  
communities



42  
states





# Survey Participants

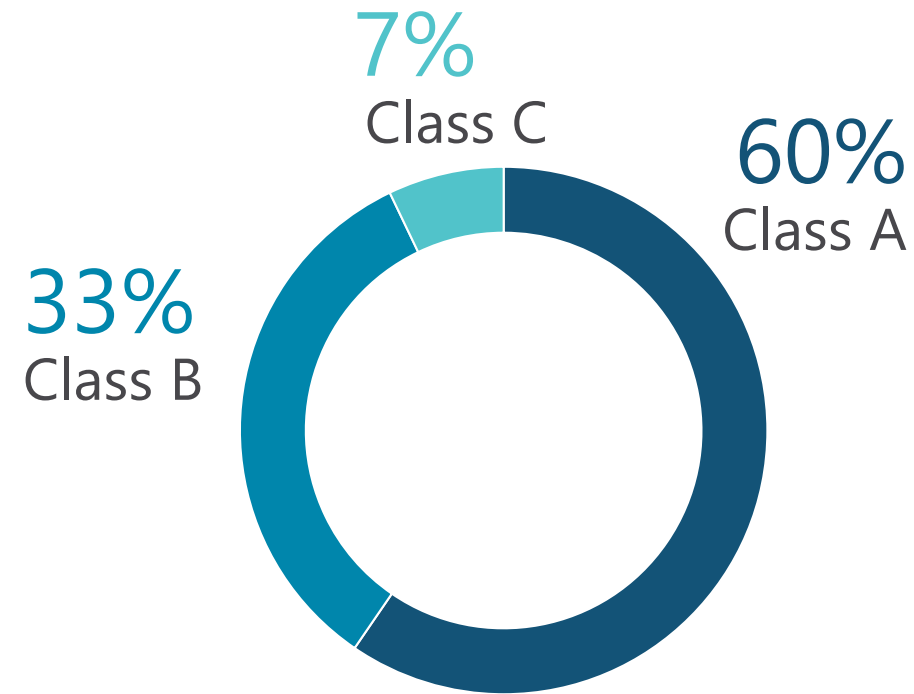


# PROPERTY DEMOGRAPHICS

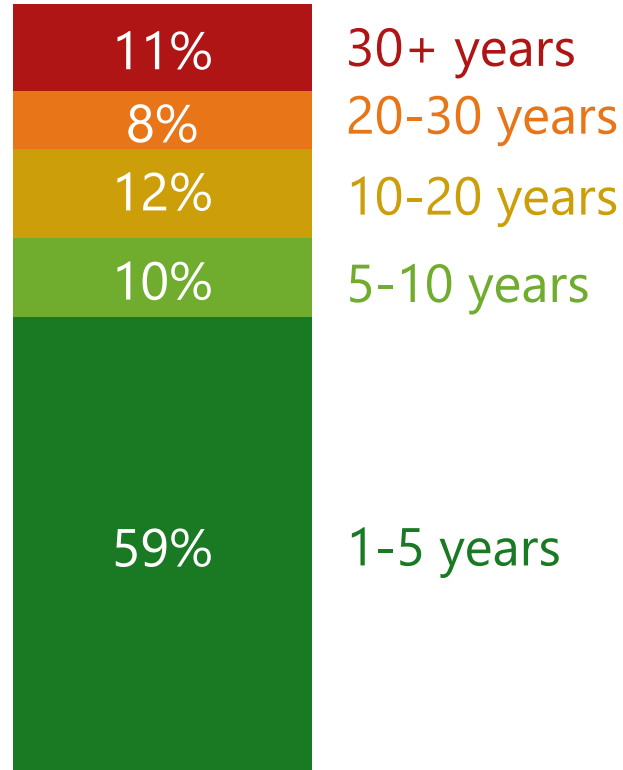


# Property Demographics

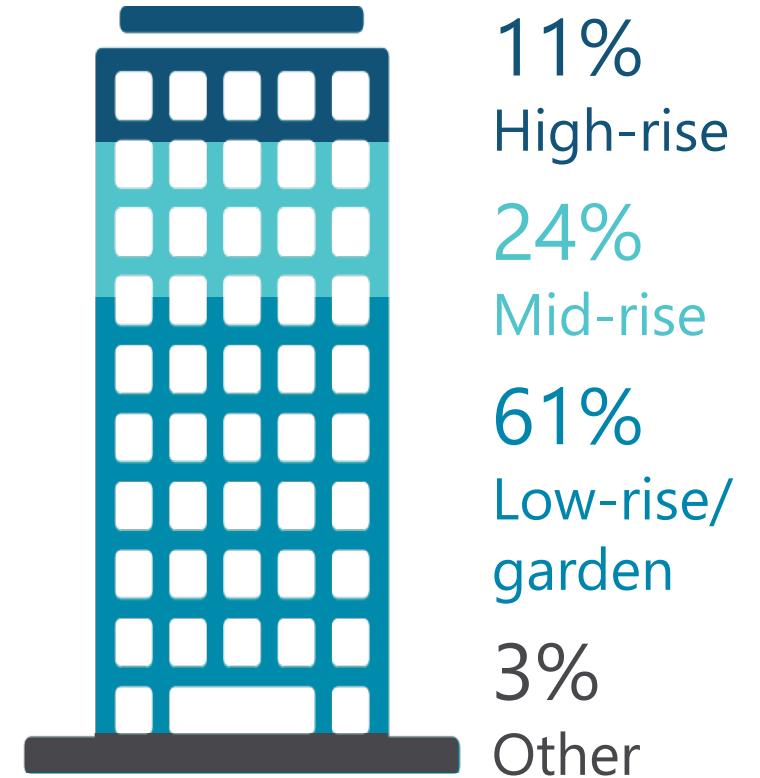
Class



Age



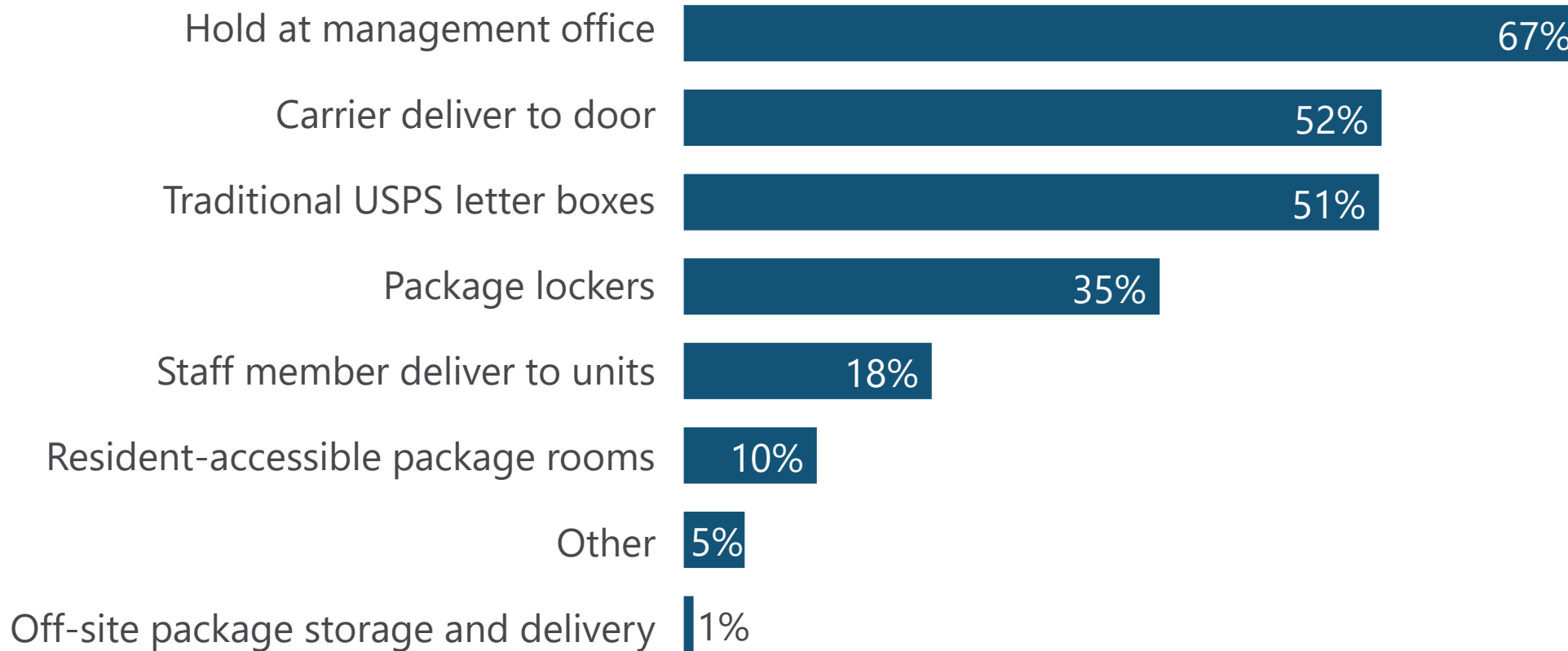
Type



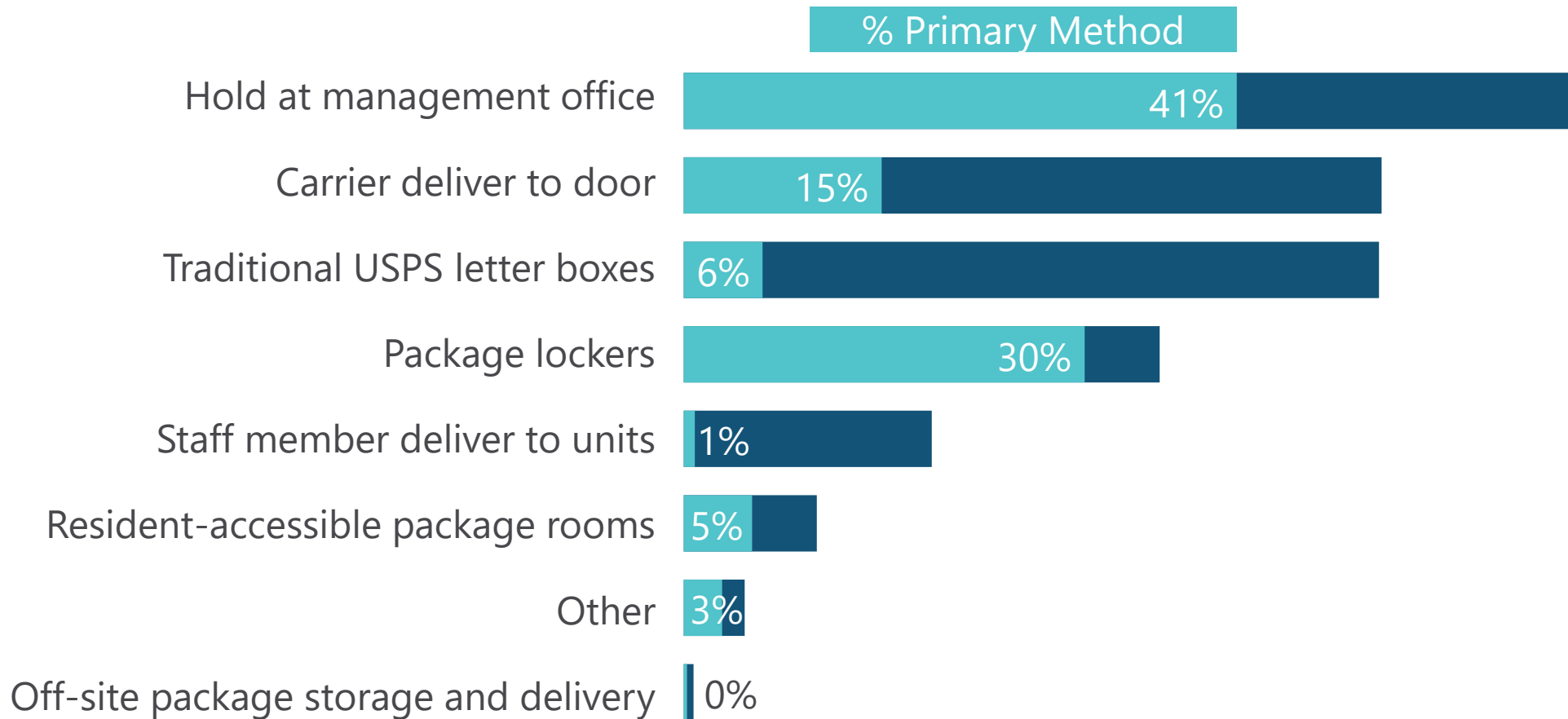
# PACKAGE PROCEDURES



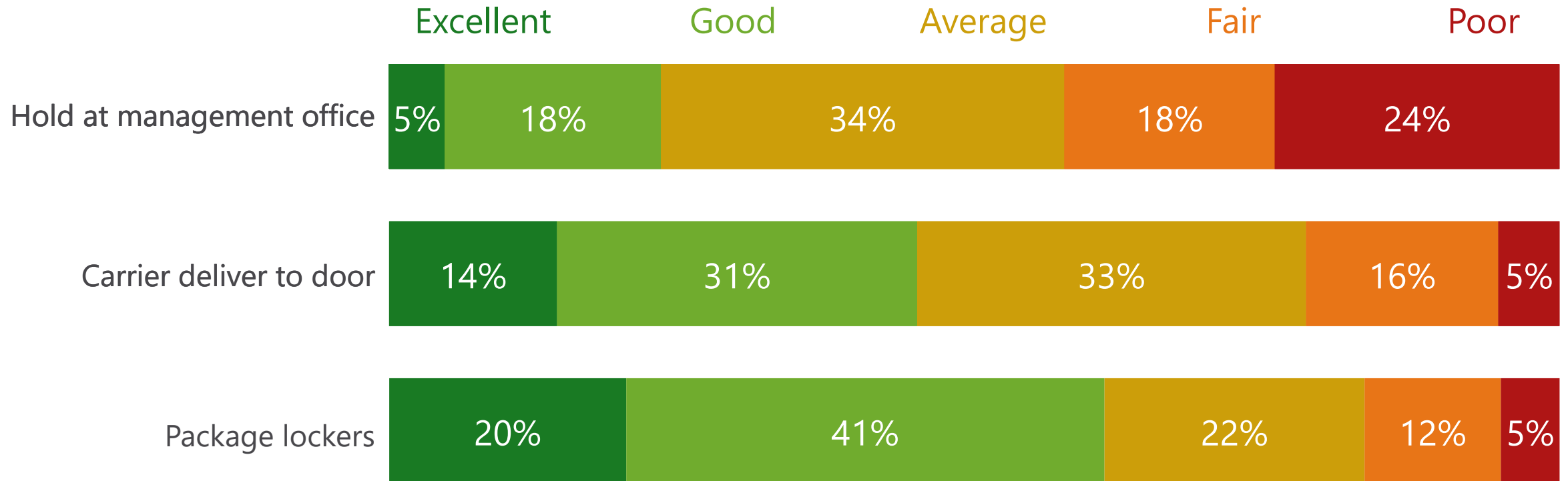
# Package Delivery Methods



# Primary Package Delivery Method



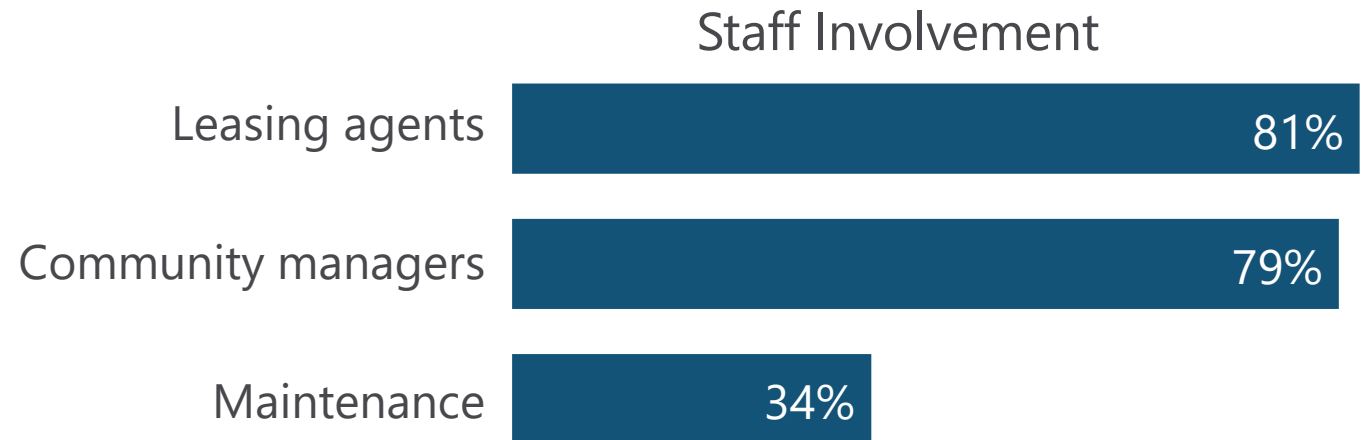
# Package Management Satisfaction



# Package Volume

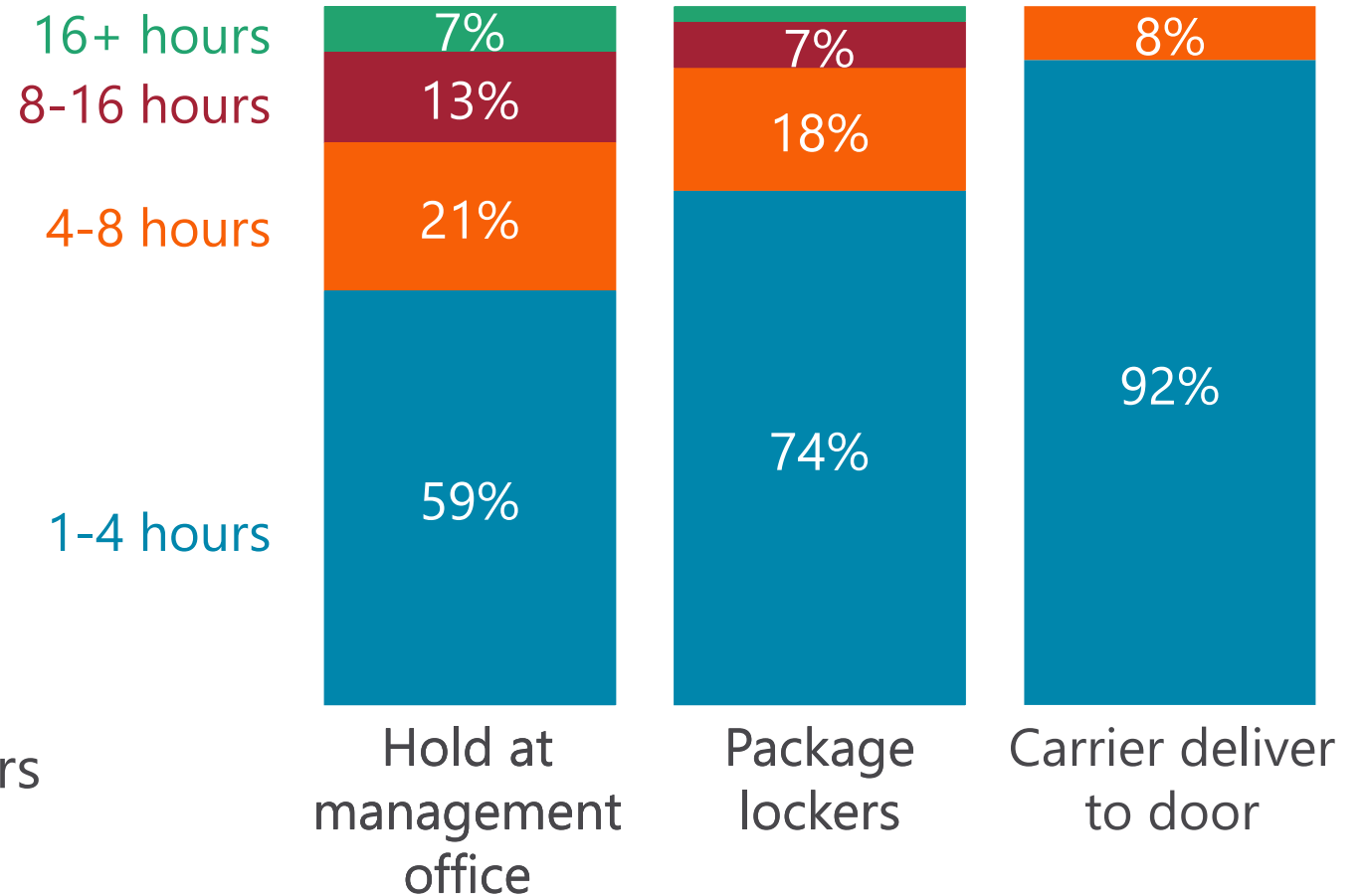
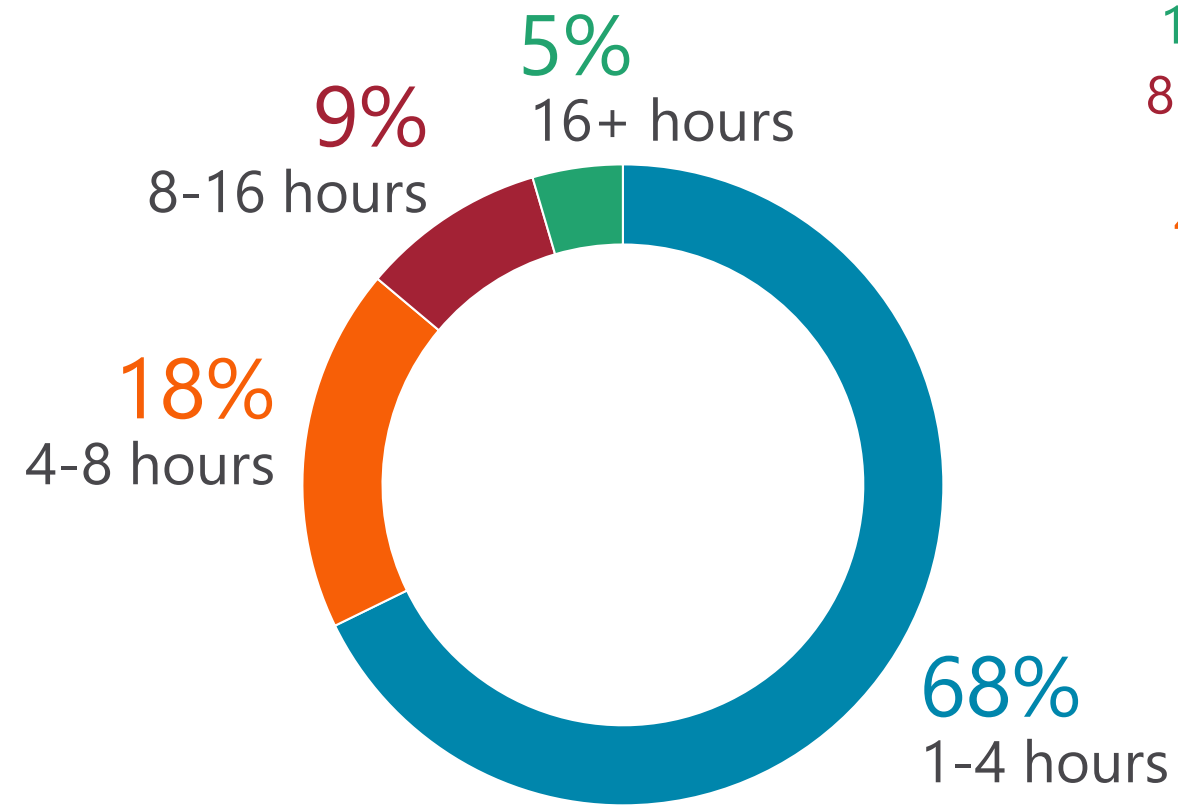


20% of communities receive 400+ packages a week during peak delivery periods versus just 8% in 2014





# Staff Time Spent per Week



# PACKAGE LOCKERS



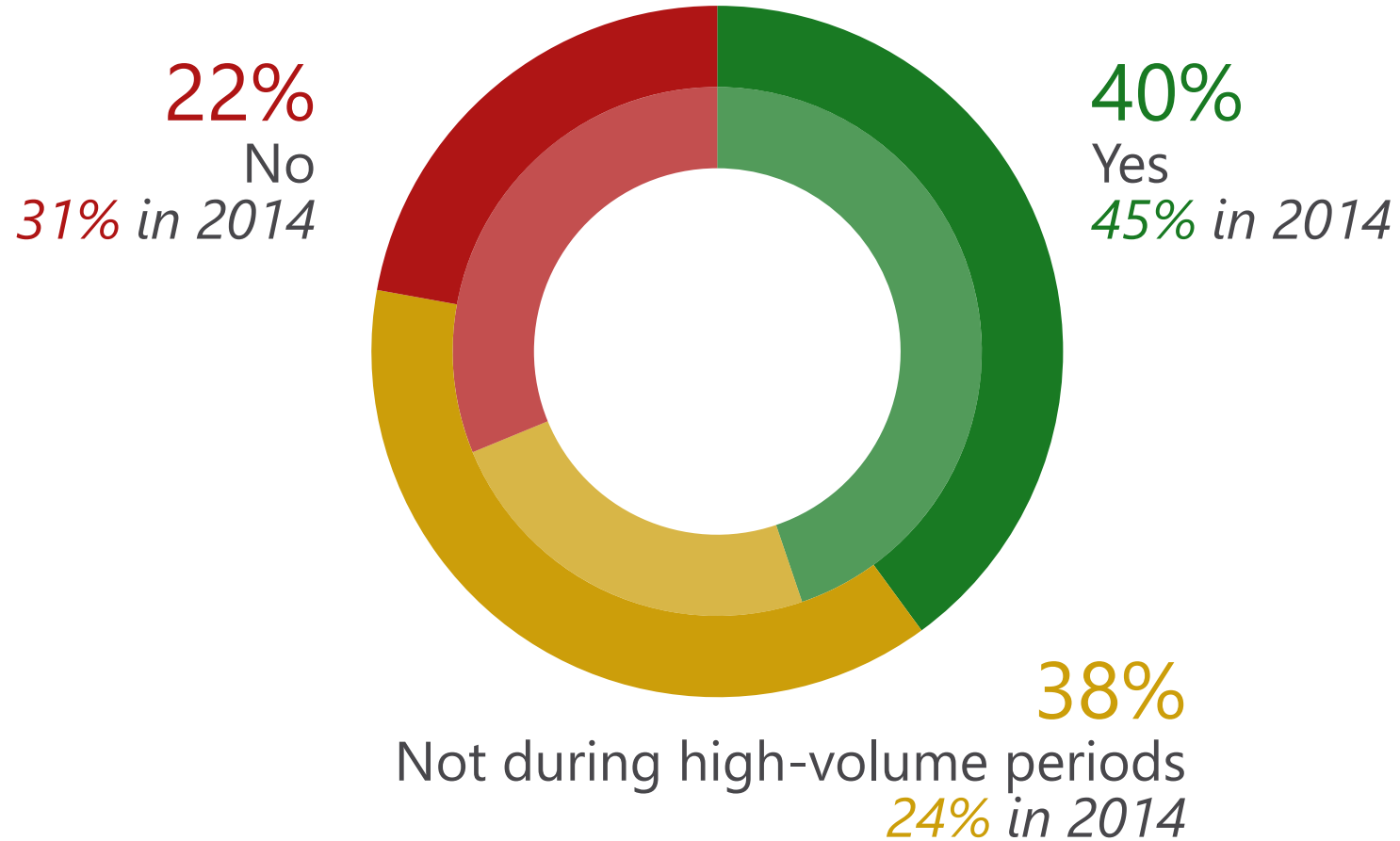
# Less Common Package Locker Features



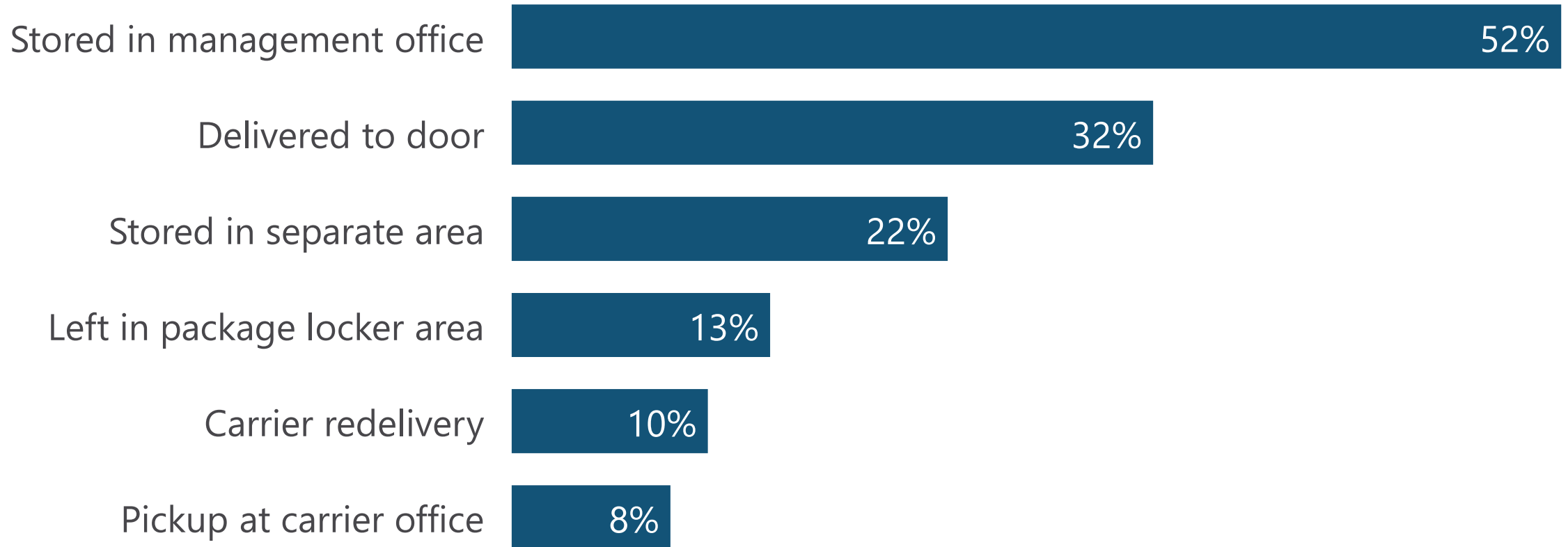
Of communities with refrigerated lockers, 43% say they are used **daily**



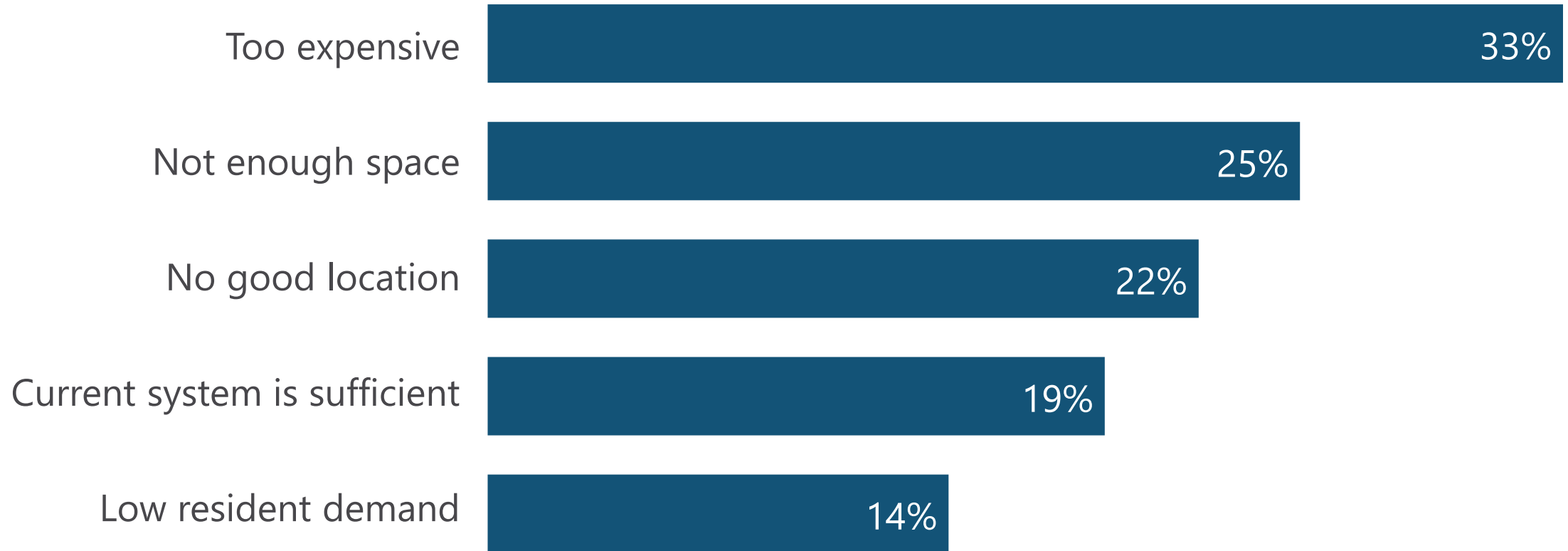
# Sufficient Locker Capacity



# Overflow/Oversized Package Solution



# Reasons for Not Using Package Lockers



# Preferred Package Management

		Primary Method Used					
		Hold in management office		Carrier deliver to door		Package lockers	
Preferred Method	Package lockers	56%	Carrier deliver to door	46%	Package lockers	83%	
	Hold at management office	20%	Package lockers	30%	Package rooms	9%	
	Package rooms	13%	Package rooms	11%	Carrier deliver to door	4%	



# INDUSTRY PANEL







Package Lockers



- ✓ Kari Warren – EVP Property Operations, Kairoi Residential
- ✓ Margette Hepfner – SVP Client Services, Lincoln Property Co.
- ✓ Kevin Thompson – CMO, Carlisle Residential Properties



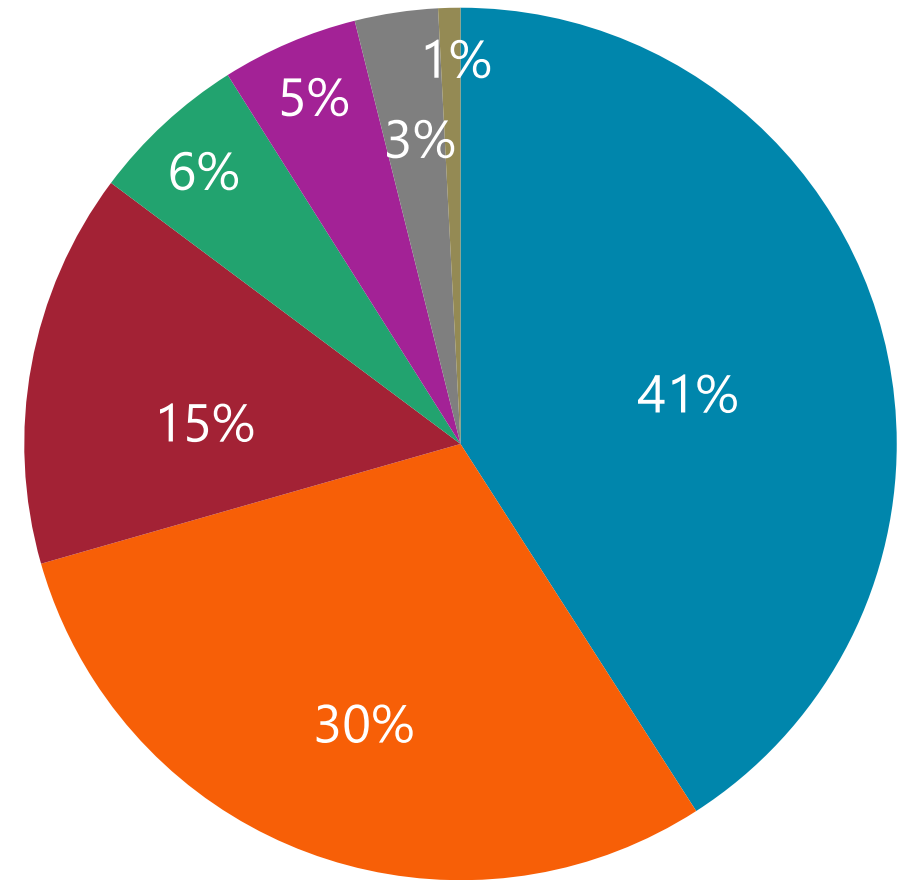


What's your strategy behind a package delivery program?



# Primary Package Delivery Method

- Hold at management office
- Package lockers
- Package carrier deliver to door
- Traditional USPS boxes
- Resident-accessible package rooms
- Other
- Staff member deliver to units



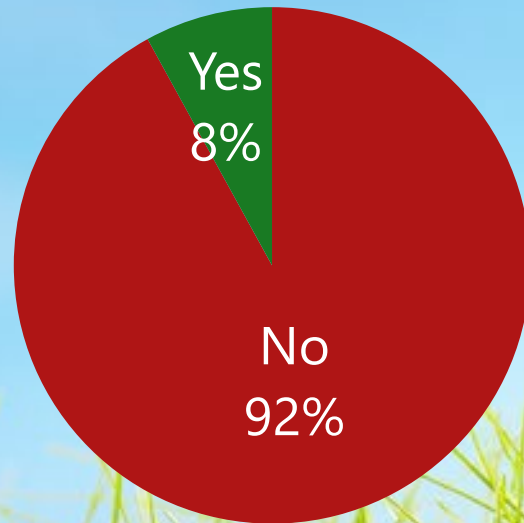
*The Customer  
Experience*





# Revenue Generation?

Do residents pay an extra fee for package delivery?



# THINGS TO CONSIDER



# What have the package carriers done instead of following your delivery instructions?

Alternate Action	2018
Dropped packages at the leasing office	49%
Dropped packages in the lobby	47%
Dropped packages at the resident's door	37%
Dropped packages in locker area without putting in locker	30%
Other	28%





# Enough space?

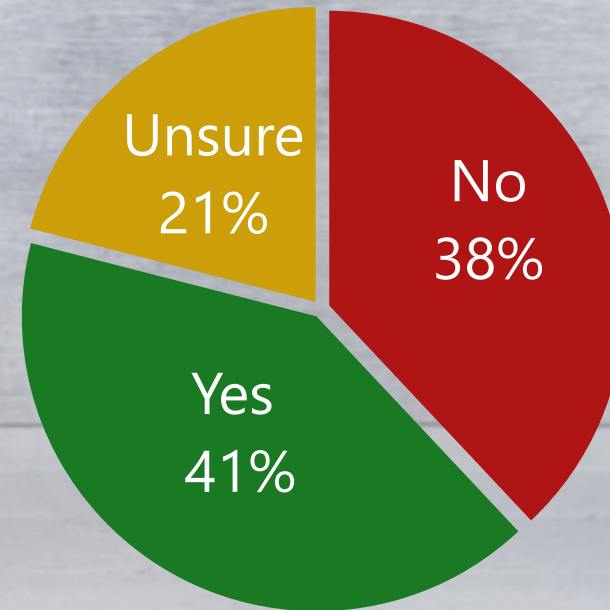


# How do you handle overflow packages or packages that are too large for package lockers?

Overflow/Oversized Package Solution	2018	2014
Stored in the management office	52%	69%
Delivered to the resident's door	32%	11%
Stored in a separate storage area	22%	14%
Left in the package locker area	13%	2%
Carrier takes back to attempt re-delivery	10%	13%
Residents notified to pick it up at carrier office	8%	8%
Haven't dealt with this issue	6%	8%



**Has the increase in e-commerce (packages) created a challenge for waste management in your community, due to the large volume of cardboard and packaging materials being disposed?**





# 5 Things to Consider During your vendor search

1. Understand up front which vendor partner will meet your package strategy (revenue, customer experience, “selfish amenity”)
2. Quality vs. Quantity in lockers – Get the best configuration for your individual needs
3. Understand the vendor’s customer support abilities (don’t make this harder on your people)
4. Different vendors have different business models (purchase outright, lease-to-own, subscription plans, etc.). Choose Wisely.
5. Ask for tech roadmaps – understand what’s coming in terms of innovation and updates



# 5 Things to Consider During Your Development Phase

1. Design for future needs (Smart Key access, refrigerated units, etc.)
2. Place trash/recycle area close to package room
3. Plan for needing more package space in the future
4. Work closely with vendors & Development for software connectivity (Cat-5), internet/wi-fi, etc.
5. Design this space as a communal hot spot, where residents can engage (expanded hours of access?)



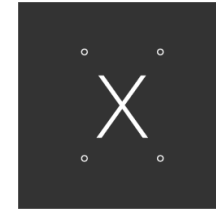
# 5 Things to Consider With your 3<sup>rd</sup> Party Owners

1. Proactively have the “reality” discussion
2. Proactively provide a revenue generation plan (this isn't just another “marketing” recommendation)
3. Have an answer to Amazon (and other vendors); Owners are hearing about them, get ahead of it.
4. Recommend space-constraint alternatives for communities that “don’t have room for lockers”
5. Help them understand the tangible value of time-savings for associates versus revenue sharing





# Package Vendor Panel



Parcel Pending & Cortland

Package Concierge & NRP Group

Luxer One & Wood Partners

Lori Torres  
Founder, CEO  
Parcel Pending

Regan Hartley  
National Director of Sales  
Package Concierge

Chris Moreno  
VP, National Sales & Partnerships  
Luxer One

Brian Ericson  
VP, Marketing Insights  
& Technology  
Cortland

Phillip Boatwright  
Sr. Regional Vice President  
The NRP Group

Steve Hallsey  
Managing Director  
Wood Partners

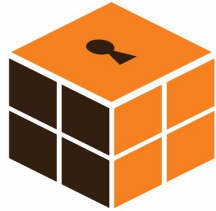
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Moderator: John Falco | Principal, Kingsley Associates





# Parcel Pending & Cortland



Parcel Pending & Cortland

Lori Torres

Founder, CEO  
Parcel Pending

Brian Ericson

VP, Marketing Insights & Technology  
Cortland



# Cortland Case Study

**82%**

very good satisfaction  
(versus 31% prior to lockers)

**40%**

significantly more likely to renew

**70%**

strongly prefer package lockers

	Before Lockers	With Lockers
Convenience	22%	90%
Speed of pick-up	29%	95%
Notification	33%	77%
Package security	51%	89%

*% indicates residents that rated each area "good" or "excellent" (4 or 5 out of 5)*





*Indoor, recessed wall*

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*Indoor, standalone*

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*Indoor, standalone*

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# Package Concierge & The NRP Group



Package Concierge & NRP Group

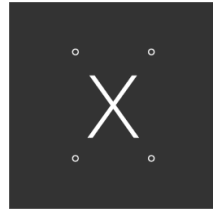
Regan Hartley  
National Director of Sales  
Package Concierge

Phillip Boatwright  
Sr. Regional Vice President  
The NRP Group





# Luxer One & Wood Partners



Luxer One & Wood Partners

Chris Moreno

VP, National Sales & Partnerships

Luxer One

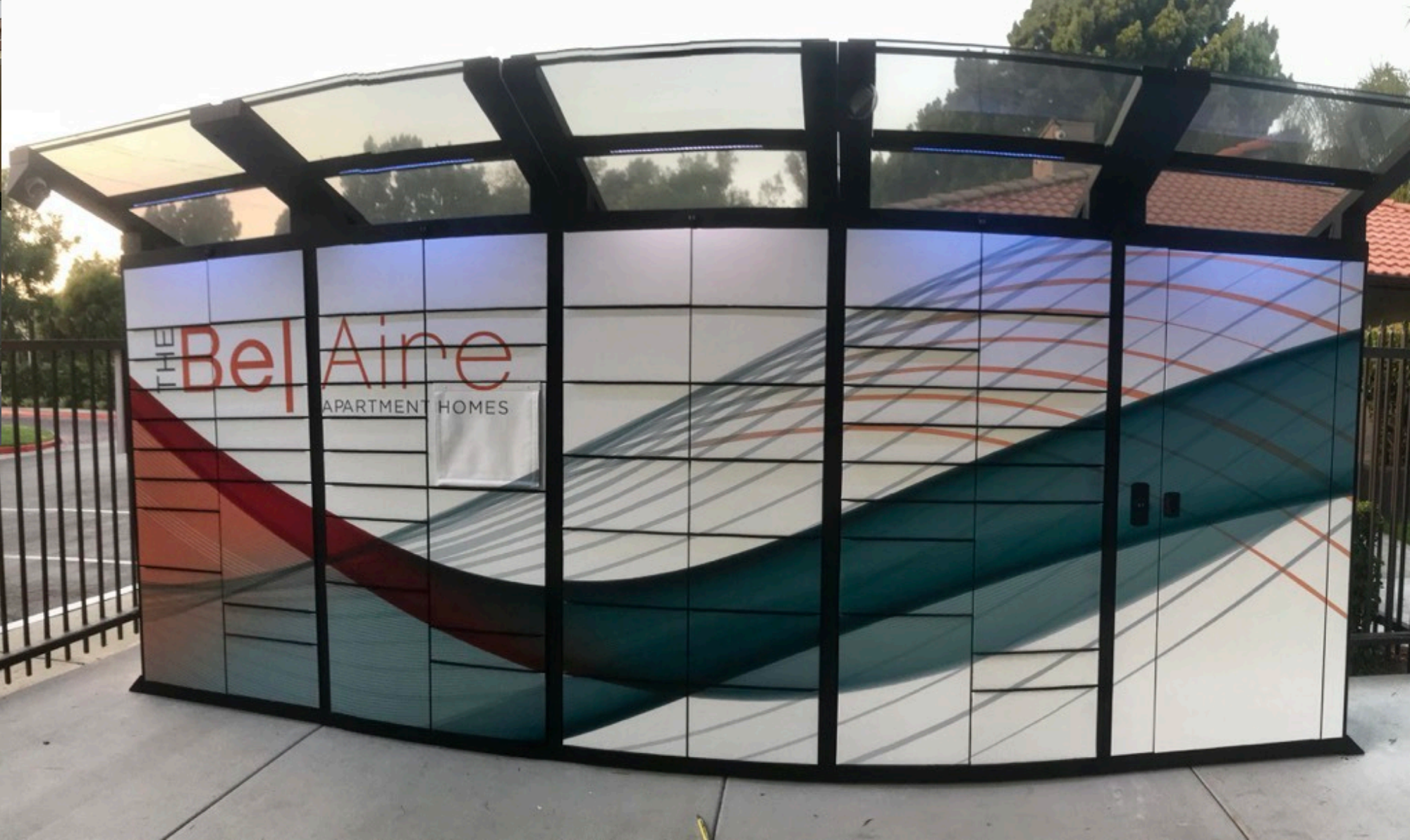
Steve Hallsey

Managing Director

Wood Partners







Interior shelving & organization for packages of any size

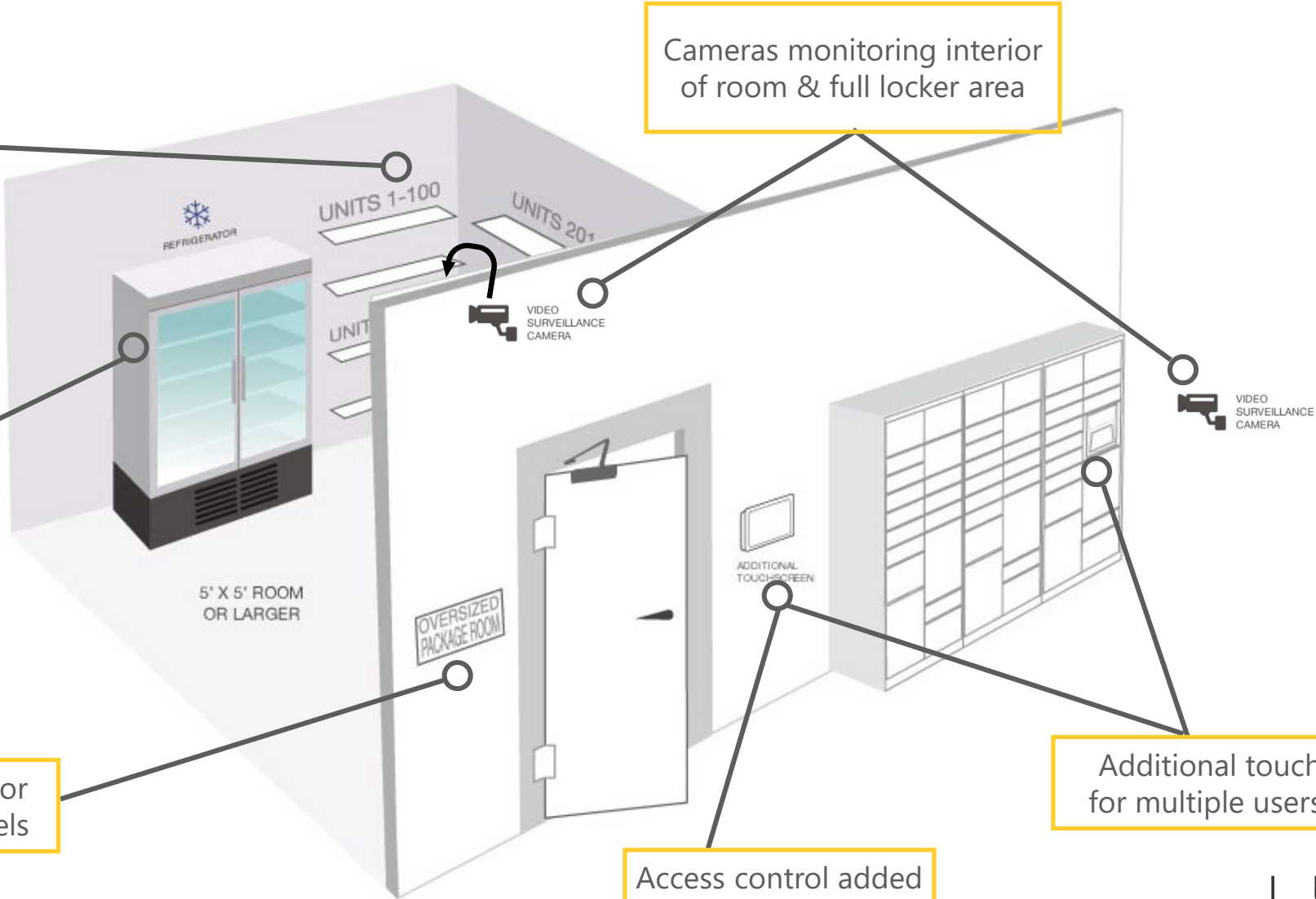
Refrigerated deliveries (groceries, flowers)

Dedicated package room for oversized & overflow parcels

Cameras monitoring interior of room & full locker area

Additional touchscreens for multiple users at once

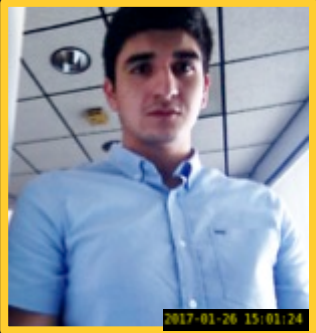
Access control added to any room



LUXER ONE







*Actual Surveillance Footage*



