

2017 NMHC/Kingsley Renter Preferences Report

Landmark research report containing insights from more than 250,000 apartment renters



NMHC NATIONAL MULTIFAMILY HOUSING COUNCIL

KINGSLEY ASSOCIATES

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PROJECT OVERVIEW AND METHODOLOGY

In partnership with the National Multifamily Housing Council (NMHC), Kingsley Associates conducted its third landmark survey of renter preferences with participation from a selection of leading firms in the multifamily real estate industry. This nationwide report contains results from all responses received across the entire study. Where available, trends from 2015 are displayed.

Overview:

The 2017 Renter Preferences Study was conducted in July 2017 with the purpose of gathering feedback directly from residents to identify:

- Apartment Feature Preferences
- Community Amenities Preferences
- Pricing Expectations
- Apartment and Community Necessities
- Apartment Search Methods
- Lease Decision Factors
- Community Services
- Communications, Online Services, and Connectivity
- Community Online Presence
- Community and Apartment Resident Demographics

Participating Firms:

The study included residents from twenty five industry-leading multifamily firms who own and/or operate over 1.4 million units across the United States. Invitations to the web survey were distributed via email to a sampling of residents, and responses were received from 272,743 residents at 4,795 communities. The participating firms included were:

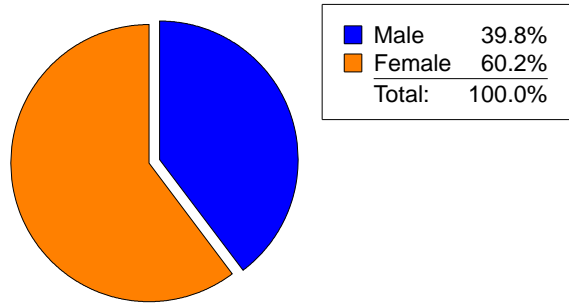
- Alliance Residential Company
- AMLI Residential
- Bell Partners
- Berkshire Property Advisors
- Camden Property Trust
- CF Real Estate
- Collier Companies
- Cortland Partners
- Essex Property Trust
- Gables Residential
- Greystar Real Estate Partners
- JPMorgan
- Kettler Management
- Laramar
- Lincoln Property Company
- Maxx Properties
- Monogram Apartment Collection
- Pinnacle
- Prime Group
- Village Green
- Walton Communities
- Waterton
- Weidner Apartment Homes
- Windsor Communities
- WinnResidential

Resident Demographics



Resident Demographics

Question : Gender
 Question Text : What is your gender?

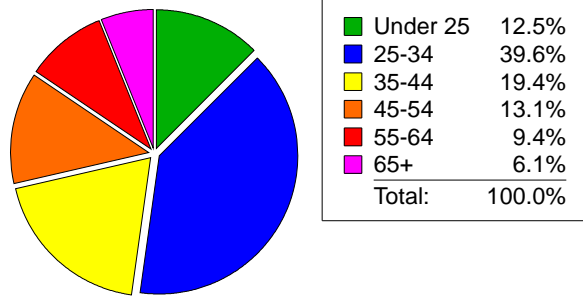


Distribution of Responses: Gender

Responses	2017 Responses	2017 Percent (%)	2015 Percent (%)
Male	107,299	40 %	43 %
Female	162,033	60 %	57 %
Total Responses:	269,332		115,105

Resident Demographics

Question : Age Range
 Question Text : What is your age?



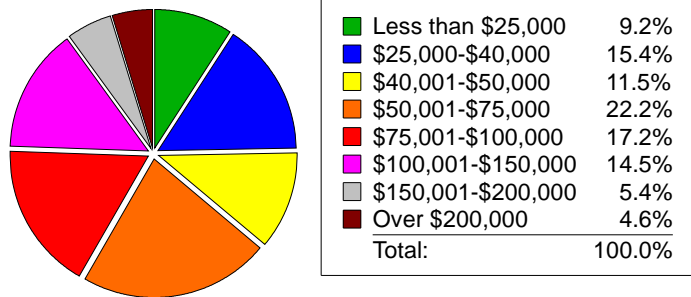
Distribution of Responses: Age Range

Responses	2017 Responses	2017 Percent (%)	2015 Percent (%)
Under 25	33,608	13 %	12 %
25-34	106,460	40 %	39 %
35-44	52,029	19 %	20 %
45-54	35,187	13 %	14 %
55-64	25,244	9 %	10 %
65+	16,310	6 %	5 %
Total Responses:	268,838		115,599

Resident Demographics

Question : Household Income

Question Text : What is your entire annual household income (includes everyone in your apartment)?



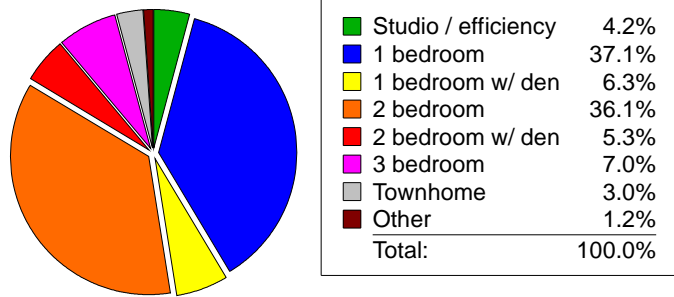
Distribution of Responses: Household Income

Responses	2017 Responses	2017 Percent (%)	2015 Percent (%)
Less than \$25,000	23,146	9%	9%
\$25,000-\$40,000	38,806	15%	17%
\$40,001-\$50,000	28,884	11%	13%
\$50,001-\$75,000	55,704	22%	23%
\$75,001-\$100,000	43,169	17%	18%
\$100,001-\$150,000	36,433	14%	13%
\$150,001-\$200,000	13,622	5%	4%
Over \$200,000	11,615	5%	3%
Total Responses:	251,379		112,405

Resident Demographics

Question : Apartment Floor Plan

Question Text : Which of the following best describes your apartment?



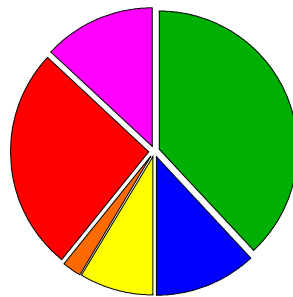
Distribution of Responses: Apartment Floor Plan

Responses	2017 Responses	2017 Percent (%)	2015 Percent (%)
Studio / efficiency	10,843	4 %	--
1 bedroom	96,801	37 %	--
1 bedroom w/ den	16,338	6 %	--
2 bedroom	94,123	36 %	--
2 bedroom w/ den	13,694	5 %	--
3 bedroom	18,122	7 %	--
Townhome	7,711	3 %	--
Other	3,070	1 %	--

Total Responses: 260,702

Resident Demographics

Question : Living Arrangement
 Question Text : What is your living arrangement?



Living alone	38.0%
Single living with roommate(s)	12.1%
Single living with child(ren) full-time	8.7%
Single living with child(ren) part-time	2.1%
Living with spouse / partner	26.1%
Living with spouse / partner and child(ren)	13.1%
Total:	100.0%

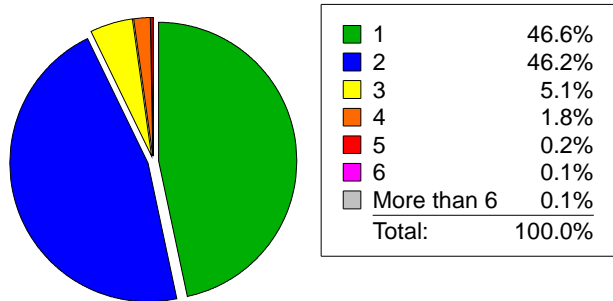
Distribution of Responses: Living Arrangement

Responses	2017 Responses	2017 Percent (%)	2015 Percent (%)
Living alone	98,156	38 %	--
Single living with roommate(s)	31,288	12 %	--
Single living with child(ren) full-time	22,380	9 %	--
Single living with child(ren) part-time	5,533	2 %	--
Living with spouse / partner	67,389	26 %	--
Living with spouse / partner and child(ren)	33,781	13 %	--

Total Responses: 258,527

Resident Demographics

Question : Number of Adult Residents
Question Text : How many adults live in your apartment on a full-time basis?



Distribution of Responses: Number of Adult Residents

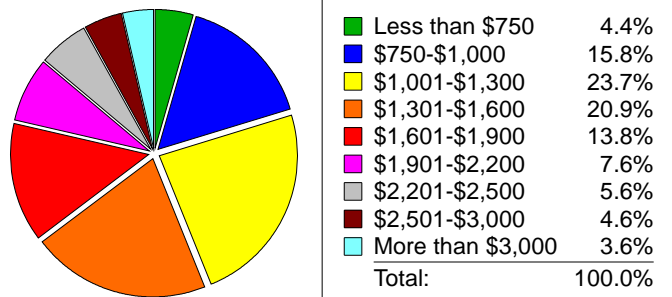
Responses	2017 Responses	2017 Percent (%)	2015 Percent (%)
1	120,196	47 %	--
2	119,101	46 %	--
3	13,045	5 %	--
4	4,552	2 %	--
5	583	0 %	--
6	147	0 %	--
More than 6	143	0 %	--

Total Responses: 257,767

Resident Demographics

Question : Monthly Rental Rate

Question Text : What is the total monthly rent for your apartment (includes everyone in your apartment)?



Distribution of Responses: Monthly Rental Rate

Responses	2017 Responses	2017 Percent (%)	2015 Percent (%)
Less than \$750	11,520	4 %	7 %
\$750-\$1,000	40,821	16 %	22 %
\$1,001-\$1,300	61,324	24 %	26 %
\$1,301-\$1,600	54,224	21 %	19 %
\$1,601-\$1,900	35,648	14 %	12 %
\$1,901-\$2,200	19,690	8 %	6 %
\$2,201-\$2,500	14,595	6 %	4 %
\$2,501-\$3,000	11,797	5 %	3 %
More than \$3,000	9,322	4 %	2 %

Total Responses:

258,941

114,271

Resident Demographics

Question : Utilities Included in Rent

Question Text : Are any of the following utilities included in your rent?

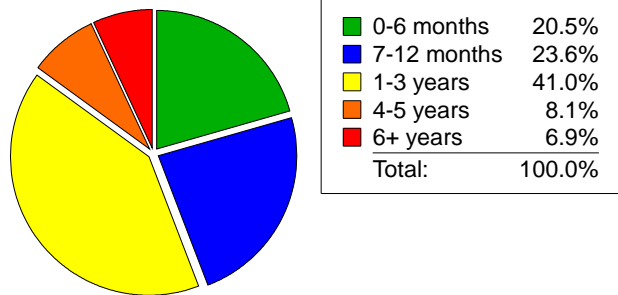
Responses	2017 Responses	2017 Percent (%)	2015 Percent (%)
Trash	141,195	84%	--
Water / sewer	123,458	73%	--
Cable TV	44,988	27%	--
Gas	42,495	25%	--
Internet	42,104	25%	--
Electric	32,552	19%	--

The table is sorted from highest to lowest number of responses. The sum of the percentages may total more than 100% due to multiple responses.

Resident Demographics

Question : Length of Time as a Resident

Question Text : How long have you been a resident of your current community?



Distribution of Responses: Length of Time as a Resident

Responses	2017 Responses	2017 Percent (%)	2015 Percent (%)
0-6 months	52,844	20 %	25 %
7-12 months	60,982	24 %	19 %
1-3 years	105,864	41 %	38 %
4-5 years	20,823	8 %	10 %
6+ years	17,791	7 %	8 %

Total Responses:

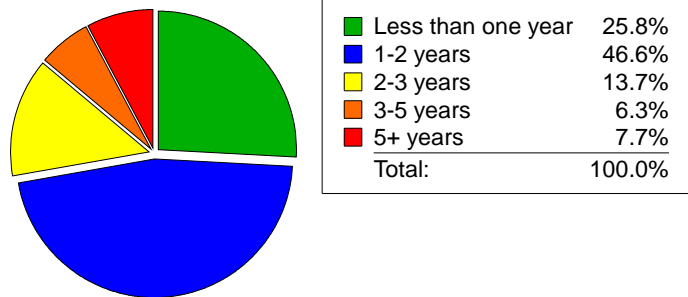
258,304

118,287

Resident Demographics

Question : Planned Length of Residency

Question Text : How long do you plan to stay at your current community?



Distribution of Responses: Planned Length of Residency

Responses	2017 Responses	2017 Percent (%)	2015 Percent (%)
Less than one year	65,851	26 %	--
1-2 years	118,929	47 %	--
2-3 years	35,070	14 %	--
3-5 years	15,985	6 %	--
5+ years	19,603	8 %	--

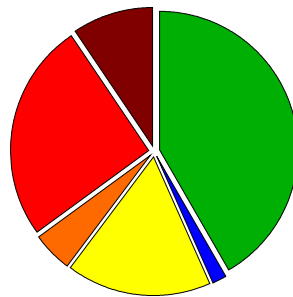
Total Responses: 255,438

Resident Demographics

Question : Plan When Current Lease Expires

Question Text : **What do you plan to do when your current lease expires?**

This question was only asked to residents who indicated that they plan to stay at their community for less than one year.



Move to a different apartment community	41.8%
Move to a different apartment unit in my current community	1.6%
Move to a non-apartment rental	16.9%
Move in with a relative / family member	4.6%
I intend to purchase a home	25.7%
Other	9.4%
Total:	100.0%

Distribution of Responses: Plan When Current Lease Expires

Responses	2017 Responses	2017 Percent (%)	2015 Percent (%)
Move to a different apartment community	27,369	42 %	--
Move to a different apartment unit in my current community	1,046	2 %	--
Move to a non-apartment rental	11,109	17 %	--
Move in with a relative / family member	3,005	5 %	--
I intend to purchase a home	16,864	26 %	--
Other	6,155	9 %	--

Total Responses: 65,548

Resident Demographics

Question : Reasons for Moving to Different Community

Question Text : What are your reasons for moving to a different apartment community?

This question was only asked to residents who indicated that they plan to move to a different apartment community when their lease expires.

Responses	2017 Responses	2017 Percent (%)	2015 Percent (%)
Seeking lower rent	13,010	48%	--
Seeking better apartment management	9,258	34%	--
Seeking better apartment features	7,283	27%	--
Seeking better community amenities	5,463	20%	--
Seeking better apartment floorplan / layout	5,134	19%	--
Seeking better parking situation	4,868	18%	--
Seeking better location / neighborhood	4,814	18%	--
Seeking safer, more secure location	4,518	17%	--
Seeking more living space	4,432	16%	--
Seeking newer building / community	4,214	15%	--
Moving away from undesirable neighbor	3,391	12%	--
Moving to new city	3,369	12%	--
Want to be closer to work / school / family / friends	3,206	12%	--
Other	2,801	10%	--
Seeking better storage situation	2,383	9%	--
Change to marital / job / family status	1,689	6%	--
Seeking better cell reception	1,453	5%	--
Seeking my own apartment / don't want roommate	1,038	4%	--
Getting a pet and need pet-friendly apartment	472	2%	--

The table is sorted from highest to lowest number of responses. The sum of the percentages may total more than 100% due to multiple responses.

Resident Demographics

Question : Reasons for Moving to Different Apartment

Question Text : What are your reasons for moving to a different apartment unit in your existing community?

This question was only asked to residents who indicated that they plan to move to a different apartment unit in their current community when their lease expires.

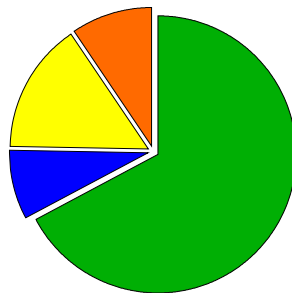
Responses	2017 Responses	2017 Percent (%)	2015 Percent (%)
Seeking lower rent	453	44%	--
Seeking better apartment features	216	21%	--
Seeking more living space	211	20%	--
Seeking better apartment floorplan / layout	209	20%	--
Other	136	13%	--
Seeking better location in the community	130	13%	--
Moving away from undesirable neighbor	118	11%	--
Change to marital / job / family status	82	8%	--
Seeking my own apartment / don't want roommate	67	6%	--
Required to move by manager due to renovation, etc.	34	3%	--
Getting pet and need pet-friendly apartment	14	1%	--

The table is sorted from highest to lowest number of responses. The sum of the percentages may total more than 100% due to multiple responses.

Resident Demographics

Question : Prior Home Ownership

Question Text : Regarding home ownership, which statement represents your current situation?



■ I have never owned a home	67.3%
■ I currently own a home	7.9%
■ I owned a home within the last seven years	15.3%
■ I owned a home more than seven years ago	9.5%
Total:	100.0%

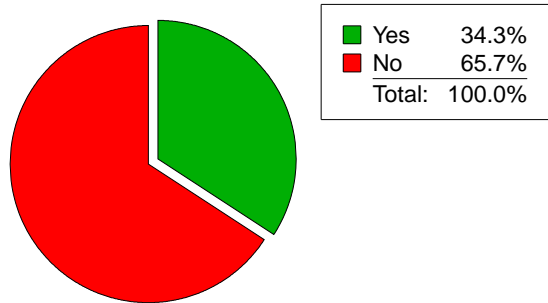
Distribution of Responses: Prior Home Ownership

Responses	2017 Responses	2017 Percent (%)	2015 Percent (%)
I have never owned a home	171,688	67 %	--
I currently own a home	20,220	8 %	--
I owned a home within the last seven years	38,965	15 %	--
I owned a home more than seven years ago	24,254	10 %	--

Total Responses: 255,127

Resident Demographics

Question : Pet Ownership
 Question Text : Are you a pet owner?



Distribution of Responses: Pet Ownership

Responses	2017 Responses	2017 Percent (%)	2015 Percent (%)
Yes	89,116	34 %	33 %
No	170,701	66 %	67 %
Total Responses:	259,817		117,680

Resident Demographics

Question : Pets Owned

Question Text : **Do you have dogs, cats, or other pets?**
This question was only asked to residents who indicated that they were a pet owner.

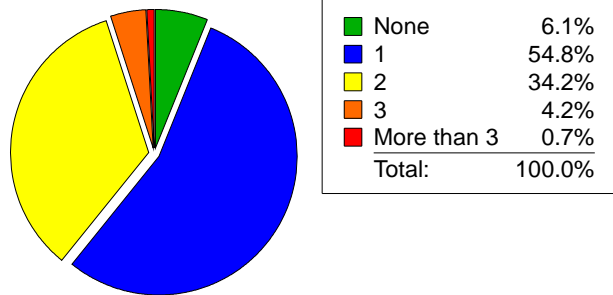
Responses	2017 Responses	2017 Percent (%)	2015 Percent (%)
Dog(s)	62,930	71 %	--
Cat(s)	30,900	35 %	--
Other	3,209	4 %	--

The table is sorted from highest to lowest number of responses. The sum of the percentages may total more than 100% due to multiple responses.

Resident Demographics

Question : Number of Vehicles Kept at Community

Question Text : How many vehicles do you keep at your community?



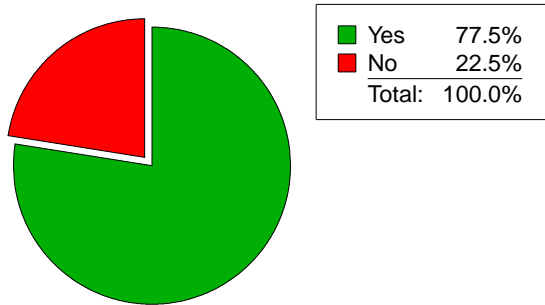
Distribution of Responses: Number of Vehicles Kept at Community

Responses	2017 Responses	2017 Percent (%)	2015 Percent (%)
None	15,520	6 %	--
1	140,073	55 %	--
2	87,557	34 %	--
3	10,770	4 %	--
More than 3	1,844	1 %	--

Total Responses: 255,764

Resident Demographics

Question : Working or Attending School
Question Text : Are you currently working or attending school?



Distribution of Responses: Working or Attending School

Responses	2017 Responses	2017 Percent (%)	2015 Percent (%)
Yes	199,378	77 %	--
No	57,885	23 %	--

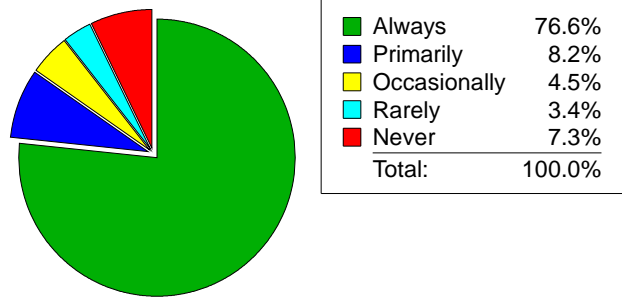
Total Responses: 257,263

Resident Demographics

Question : Commuting Method - Car

Question Text : How often do you use your car to commute to work / school?

This question was only asked to residents who indicated that they currently work or attend school.



Distribution of Responses: Commuting Method - Car

Responses	2017 Responses	2017 Percent (%)	2015 Percent (%)
Always	143,997	77 %	--
Primarily	15,386	8 %	--
Occasionally	8,430	4 %	--
Rarely	6,325	3 %	--
Never	13,727	7 %	--

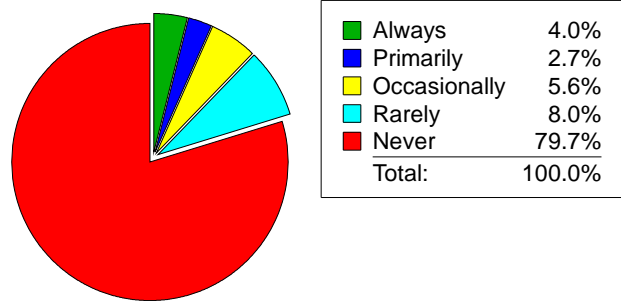
Total Responses: 187,865

Resident Demographics

Question : Commuting Method - Train

Question Text : How often do you use a train to commute to work / school?

This question was only asked to residents who indicated that they currently work or attend school.



Distribution of Responses: Commuting Method - Train

Responses	2017 Responses	2017 Percent (%)	2015 Percent (%)
Always	6,223	4 %	--
Primarily	4,227	3 %	--
Occasionally	8,842	6 %	--
Rarely	12,604	8 %	--
Never	124,897	80 %	--

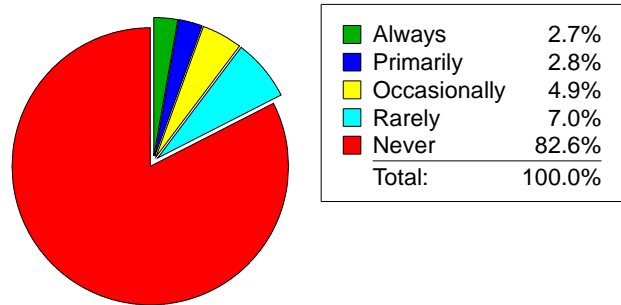
Total Responses: 156,793

Resident Demographics

Question : Commuting Method - Bus

Question Text : How often do you use a bus to commute to work / school?

This question was only asked to residents who indicated that they currently work or attend school.



Distribution of Responses: Commuting Method - Bus

Responses	2017 Responses	2017 Percent (%)	2015 Percent (%)
Always	4,152	3 %	--
Primarily	4,333	3 %	--
Occasionally	7,584	5 %	--
Rarely	10,909	7 %	--
Never	128,070	83 %	--

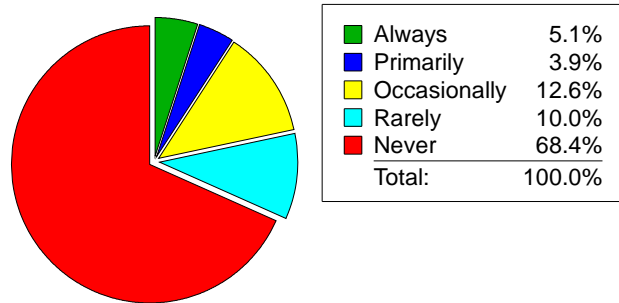
Total Responses: 155,048

Resident Demographics

Question : Commuting Method - Walk

Question Text : How often do you walk to commute to work / school?

This question was only asked to residents who indicated that they currently work or attend school.



Distribution of Responses: Commuting Method - Walk

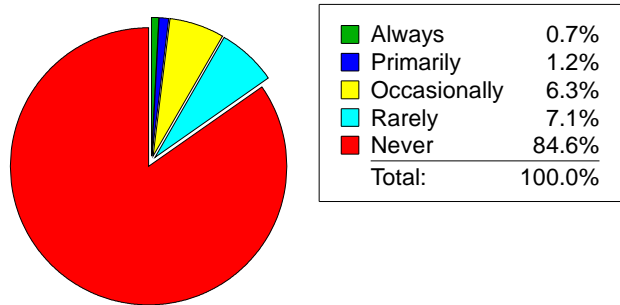
Responses	2017 Responses	2017 Percent (%)	2015 Percent (%)
Always	7,941	5 %	--
Primarily	6,148	4 %	--
Occasionally	19,632	13 %	--
Rarely	15,501	10 %	--
Never	106,534	68 %	--

Total Responses: 155,756

Resident Demographics

Question : **Commuting Method - Bike**

Question Text : **How often do you use a bike to commute to work / school?**
This question was only asked to residents who indicated that they currently work or attend school.



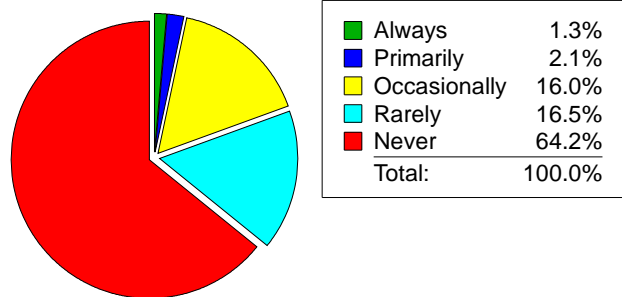
Distribution of Responses: Commuting Method - Bike

Responses	2017 Responses	2017 Percent (%)	2015 Percent (%)
Always	1,107	1 %	--
Primarily	1,896	1 %	--
Occasionally	9,683	6 %	--
Rarely	10,976	7 %	--
Never	129,990	85 %	--

Total Responses: 153,652

Resident Demographics

Question : Commuting Method - Taxi / Carpool / Rideshare
Question Text : **How often do you use a taxi / carpool / rideshare to commute to work / school?**
This question was only asked to residents who indicated that they currently work or attend school.



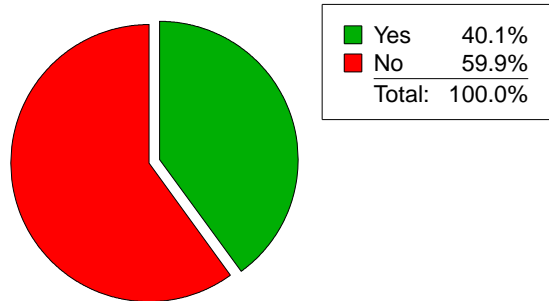
Distribution of Responses: Commuting Method - Taxi / Carpool / Rideshare

Responses	2017 Responses	2017 Percent (%)	2015 Percent (%)
Always	1,972	1 %	--
Primarily	3,322	2 %	--
Occasionally	24,932	16 %	--
Rarely	25,759	16 %	--
Never	100,217	64 %	--

Total Responses: 156,202

Resident Demographics

Question : Telecommuting
Question Text : Do you ever work from home?



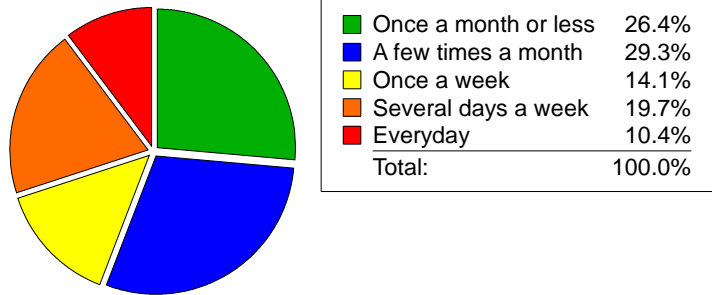
Distribution of Responses: Telecommuting

Responses	2017 Responses	2017 Percent (%)	2015 Percent (%)
Yes	103,076	40 %	--
No	154,255	60 %	--

Total Responses: 257,331

Resident Demographics

Question : Telecommuting Frequency
Question Text : **How often do you work from home?**
This question was only asked to residents who indicated that they work from home with some frequency.



Distribution of Responses: Telecommuting Frequency

Responses	2017 Responses	2017 Percent (%)	2015 Percent (%)
Once a month or less	26,905	26 %	--
A few times a month	29,847	29 %	--
Once a week	14,406	14 %	--
Several days a week	20,097	20 %	--
Everyday	10,563	10 %	--

Total Responses: 101,818

Interest Level - Features, Amenities & Activities



Apartment Features - Interest In
 Rating Areas

Apartment Features: Respondents were asked to indicate their interest level in the following apartment features. Answers are sorted in descending order, so that those features that residents find of most interest are at the top.

Scale: 1 = Not at all interested, 2 = Uninterested, 3 = Neutral, 4 = Interested, 5 = Very interested

Amenity / Feature	Mean	% 4s / 5s	
		2015	2017
Air Conditioning	4.77	--	94%
High Speed Internet Access	4.72	94%	93%
Soundproof Walls	4.62	88%	91%
Washer / Dryer in Unit	4.61	87%	89%
Dishwasher	4.56	--	88%
Garbage Disposal	4.55	83%	88%
Walk-in Closet	4.37	89%	82%
Patio or Balcony	4.36	87%	82%
Microwave	4.33	87%	80%
Refrigerator With Water / Ice Dispenser	4.32	85%	80%
Energy Star Certified Appliances	4.27	--	78%
Bath Tub	4.24	--	77%
Stove Hood	4.24	76%	77%
Washer / Dryer Hookups	4.19	73%	76%
Ceiling Fan in Bedroom	4.15	--	75%
Hardwood Floors	4.06	77%	70%
Premium Countertops	4.05	75%	71%
Pre-installed WiFi in Apartment	3.99	76%	69%
Smart Thermostats	3.89	81%	66%
Alarm System	3.81	60%	62%
Kitchen Island	3.78	71%	61%
High Ceilings (9ft+)	3.77	56%	61%

Apartment Features - Interest In
 Rating Areas, *continued*

Amenity / Feature	Mean	% 4s / 5s	
		2015	2017
Walk-in Pantry	3.76	70%	59%
In-wall USB Ports	3.73	66%	60%
Smart Lighting	3.71	--	59%
Non-key Secure Access	3.61	61%	56%
Gas Stove	3.58	56%	55%
TV Wall Mount	3.55	59%	54%
Smart Locks	3.54	--	54%
Low-flow Toilets	3.54	--	51%
Modular Closet System	3.46	67%	49%
Video Doorbell	3.42	--	49%
Stand-alone Shower without Bath Tub	3.35	--	48%
Built-in Sound System	3.32	--	46%
Breakfast Bar	3.28	--	43%
Two Master Suites	3.01	43%	38%
Fireplace	2.94	48%	36%

Community Amenities - Interest In
 Rating Areas

Community Amenities: Respondents were asked to indicate their interest level in the following community amenities. Answers are sorted in descending order, so that those amenities that residents find of most interest are at the top.

Scale: 1 = Not at all interested, 2 = Uninterested, 3 = Neutral, 4 = Interested, 5 = Very interested

Amenity / Feature	Mean	% 4s / 5s	
		2015	2017
Reliable Cell Reception	4.68	--	92%
Secure Resident Parking	4.53	--	88%
Secure Amenity Access	4.41	--	84%
Swimming Pool	4.39	83%	82%
Fitness Center	4.38	82%	82%
Secure Visitor Parking	4.20	--	76%
Gated Community Access	4.17	80%	75%
Recycling	4.16	80%	75%
Non-smoking Buildings	4.16	76%	75%
Shared Outdoor Space	3.88	--	66%
Additional Storage Space Outside Of Unit	3.87	72%	66%
Sustainability / Green Initiatives	3.86	73%	65%
Front Desk Person / Concierge	3.85	44%	65%
Common Area Barbecue Grills	3.84	58%	65%
Sustainability / Green Certifications	3.76	75%	61%
Community WiFi	3.69	61%	61%
Package Lockers	3.57	--	57%
On-site Renewable Energy	3.52	--	55%
Club House / Party Room	3.51	57%	54%
Rooftop Space	3.50	--	56%
On-site Car Wash	3.29	56%	49%

Community Amenities - Interest In
 Rating Areas, *continued*

% 4s / 5s

Amenity / Feature	Mean	2015	2017
Community Chef Kitchen Space	3.15	43%	42%
Community Dog Park	3.11	37%	45%
Playground	3.11	43%	44%
Valet Trash Service	3.04	47%	42%
Community Vegetable Garden	2.98	39%	39%
Basketball Court	2.97	--	39%
Organic Waste Composting	2.93	--	38%
Table Tennis	2.86	--	36%
Laundry Lockers	2.84	36%	34%
Ability To List Apartment On Short-Term Rental Site	2.82	--	37%
Community Pet-washing Station	2.81	29%	37%
Pet Daycare Service	2.67	--	33%
Private Office Space	2.61	--	27%
Dog Treats in Lobby	2.55	20%	29%
Racquetball Court	2.54	--	27%
Shared Office Space	2.54	--	24%
Conference Room / Meeting Space	2.52	35%	24%
Secured, Covered Bike Storage	2.49	33%	27%
Pet Walking Service	2.48	--	27%
Bocceball Court	2.41	--	23%
Bike Maintenance / Repair Area	2.26	22%	19%
Electric Car-charging Station	2.15	19%	18%
Bike Sharing	2.06	18%	15%
Car Sharing	1.97	18%	13%

Pricing Expectations - Features, Amenities & Activities



Apartment Features - Pricing
 Rating Areas

Apartment Features - Pricing: Respondents were asked how much more rent per month they would expect a renter in their area to pay for the following apartment features (asked only if they expressed interest in a prior question). Answers are sorted so that those features that residents would expect to pay the most for are at the top.

Scale: \$1 to \$100 in \$1 increments

Amenity / Feature	Average Dollars per Month
Two Master Suites	\$ 48.89
Air Conditioning	\$ 42.37
Washer / Dryer in Unit	\$ 41.05
Soundproof Walls	\$ 36.27
Hardwood Floors	\$ 35.46
Patio or Balcony	\$ 34.48
High Speed Internet Access	\$ 33.63
Alarm System	\$ 33.53
Premium Countertops	\$ 33.09
Built-in Sound System	\$ 33.04
Pre-installed WiFi in Apartment	\$ 32.92
Fireplace	\$ 32.43
Dishwasher	\$ 31.48
Smart Locks	\$ 31.32
Kitchen Island	\$ 31.07
Walk-in Closet	\$ 31.06
Video Doorbell	\$ 30.58
Stand-alone Shower without Bath Tub	\$ 30.57
Refrigerator With Water / Ice Dispenser	\$ 30.16
Smart Thermostats	\$ 30.00
Energy Star Certified Appliances	\$ 29.82
Smart Lighting	\$ 29.50
Gas Stove	\$ 29.35
High Ceilings (9ft+)	\$ 29.35

Apartment Features - Pricing
 Rating Areas, *continued*

Amenity / Feature	Average Dollars per Month
Non-key Secure Access	\$ 28.94
Modular Closet System	\$ 28.88
Washer / Dryer Hookups	\$ 28.82
Bath Tub	\$ 28.20
Breakfast Bar	\$ 28.17
Walk-in Pantry	\$ 27.95
Stove Hood	\$ 27.40
In-wall USB Ports	\$ 26.18
Microwave	\$ 25.61
Garbage Disposal	\$ 25.36
Low-flow Toilets	\$ 25.33
Ceiling Fan in Bedroom	\$ 25.26
TV Wall Mount	\$ 25.16

Community Amenities - Pricing
 Rating Areas

Community Amenities - Pricing: Respondents were asked how much more rent per month they would expect a renter in their area to pay for the following community amenities (asked only if they expressed interest in a prior question). Answers are sorted so that those amenities that residents would expect to pay the most for are at the top.

Scale: \$1 to \$100 in \$1 increments

Amenity / Feature	Average Dollars per Month
Swimming Pool	\$ 34.22
Secure Resident Parking	\$ 33.56
Gated Community Access	\$ 33.52
Pet Daycare Service	\$ 33.24
Rooftop Space	\$ 31.93
Fitness Center	\$ 31.75
Private Office Space	\$ 31.69
Non-Smoking Buildings	\$ 31.29
Ability To List Apartment On Short-Term Rental Site	\$ 31.02
Additional Storage Space Outside Of Unit	\$ 30.78
Pet Walking Service	\$ 30.57
Basketball Court	\$ 30.12
Front Desk Person / Concierge	\$ 29.95
Playground	\$ 29.84
Electric Car-charging Station	\$ 29.82
Community Chef Kitchen Space	\$ 29.60
Club House / Party Room	\$ 29.23
Reliable Cell Reception	\$ 29.22
Racquetball Court	\$ 29.14
Conference Room / Meeting Space	\$ 29.01
On-site Renewable Energy	\$ 28.68
Community Dog Park	\$ 28.65
Secure Visitor Parking	\$ 28.22
Laundry Lockers	\$ 28.08

Community Amenities - Pricing
 Rating Areas, *continued*

Amenity / Feature	Average Dollars per Month
Car Sharing	\$ 28.04
Bocceball Court	\$ 27.91
Secure Amenity Access	\$ 27.71
Sustainability / Green Initiatives	\$ 27.27
Valet Trash Service	\$ 27.23
Sustainability / Green Certifications	\$ 27.21
Shared Office Space	\$ 27.06
Table Tennis	\$ 26.74
Community Pet-washing Station	\$ 26.48
Common Area Barbecue Grills	\$ 26.36
Shared Outdoor Space	\$ 26.34
Community Vegetable Garden	\$ 25.45
Community WiFi	\$ 25.05
Organic Waste Composting	\$ 25.03
On-site Car Wash	\$ 24.59
Bike Sharing	\$ 23.74
Bike Maintenance / Repair Area	\$ 23.54
Package Lockers	\$ 23.42
Recycling	\$ 23.18
Secured, Covered Bike Storage	\$ 22.81
Dog Treats in Lobby	\$ 21.70

Necessities - Features, Amenities & Activities



Apartment Features - Necessity
 Rating Areas

Apartment Features: Respondents were asked whether or not they would rent an apartment without the following apartment features (asked only if they expressed interest in a prior question). Answers are sorted so that those features which residents find most necessary are at the top.

Scale: 1 = No, I would not rent without this, 2 = Yes, I would rent even without this

Amenity / Feature	Percent Indicating Necessary
Air Conditioning	92%
Dishwasher	86%
Washer / Dryer in Unit	77%
Washer / Dryer Hookups	76%
Garbage Disposal	75%
Bath Tub	73%
Microwave	65%
High Speed Internet Access	63%
Patio or Balcony	63%
Walk-in Closet	58%
Ceiling Fan in Bedroom	53%
Soundproof Walls	53%
Stove Hood	51%
Refrigerator With Water / Ice Dispenser	49%
Hardwood Floors	37%
Premium Countertops	36%
Energy Star Certified Appliances	36%
Stand-alone Shower without Bath Tub	32%
Gas Stove	31%
High Ceilings (9ft+)	28%
Kitchen Island	28%
Low-flow Toilets	27%
Alarm System	27%
Breakfast Bar	25%
Two Master Suites	25%

Apartment Features - Necessity
 Rating Areas, *continued*

Amenity / Feature	Percent Indicating Necessary
Walk-in Pantry	24%
Non-key Secure Access	23%
Fireplace	22%
Modular Closet System	22%
Pre-installed WiFi in Apartment	20%
Smart Thermostats	17%
Smart Lighting	14%
In-wall USB Ports	14%
Smart Locks	14%
TV Wall Mount	13%
Video Doorbell	13%
Built-in Sound System	13%

Community Amenities - Necessity
 Rating Areas

Community Amenities: Respondents were asked whether or not they would rent an apartment without the following community amenities (asked only if they expressed interest in a prior question). Answers are sorted so that those amenities which residents find most necessary are at the top.

Scale: 1 = No, I would not rent without this, 2 = Yes, I would rent even without this

Amenity / Feature	Percent Indicating Necessary
Reliable Cell Reception	78%
Secure Resident Parking	71%
Swimming Pool	60%
Non-smoking Buildings	57%
Fitness Center	55%
Gated Community Access	54%
Secure Amenity Access	49%
Secure Visitor Parking	45%
Front Desk Person / Concierge	37%
Recycling	36%
Common Area Barbecue Grills	33%
Club House / Party Room	31%
Shared Outdoor Space	30%
Additional Storage Space Outside of Unit	30%
Playground	30%
Community Dog Park	27%
Valet Trash Service	27%
Community WiFi	26%
Package Lockers	25%
Sustainability / Green initiatives	20%
Community Chef Kitchen Space	20%
Sustainability / Green Certifications	19%
Conference Room / Meeting Space	18%
Basketball Court	17%

Community Amenities - Necessity
 Rating Areas, *continued*

Amenity / Feature	Percent Indicating Necessary
Shared Office Space	16%
Secured, Covered Bike Storage	16%
Laundry Lockers	15%
Rooftop Space	15%
Ability To List Apartment On Short-Term Rental Site	14%
Electric Car-charging Station	14%
Community Pet-washing Station	13%
Private Office Space	13%
Table Tennis	12%
Organic Waste Composting	12%
Racquetball Court	12%
Bocceball Court	12%
Dog Treats in Lobby	11%
Pet Walking Service	11%
On-site Renewable Energy	11%
Car Sharing	10%
Pet Daycare Service	10%
On-site Car Wash	10%
Community Vegetable Garden	9%
Bike Maintenance / Repair Area	9%
Bike Sharing	7%

Community Services



Package Services
Rating Areas

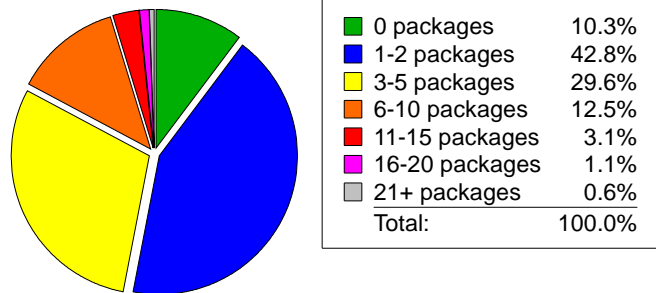
Respondents were asked to rank the following package pick-up options in order of preference. In the table below, the "Top 2 Mentions" column represents the aggregation of 1st and 2nd highest rankings for the response category. Answers are sorted so that those options which residents rank highest are at the top.

Responses	Average Rank	Count	Top 2 Mentions (%)	% 1st	% 2nd	% 3rd	% 4th	%5th
Offer 24/7, Self-Service Pick-Up	1.99	97,259	71%	44%	27%	17%	10%	2%
Drop Packages at My Door	2.55	97,259	51%	25%	26%	25%	20%	5%
Keep Management Office Open Later	2.73	97,259	42%	16%	26%	29%	25%	3%
Deliver Packages Inside My Unit	3.09	97,259	32%	13%	19%	24%	34%	10%
Other	4.63	97,259	5%	2%	3%	5%	10%	80%

Package Services

Question : Packages per Month

Question Text : How many packages do you generally receive per month?



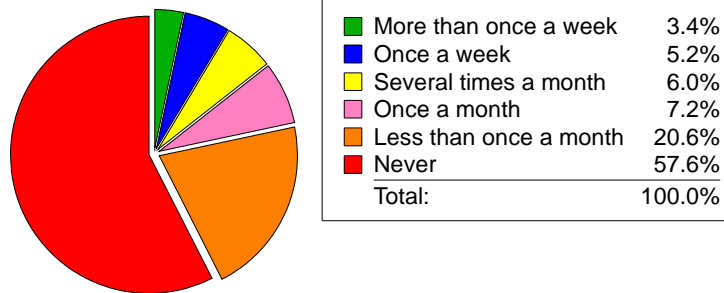
Distribution of Responses: Packages per Month

Responses	2017 Responses	2017 Percent (%)	2015 Percent (%)
0 packages	10,892	10 %	--
1-2 packages	45,183	43 %	--
3-5 packages	31,169	30 %	--
6-10 packages	13,133	12 %	--
11-15 packages	3,267	3 %	--
16-20 packages	1,175	1 %	--
21+ packages	642	1 %	--

Total Responses: 105,461

Package Services

Question : Package Type Frequency - Perishables Requiring Refrigeration
Question Text : Please indicate how often you receive packages containing perishables requiring refrigeration.



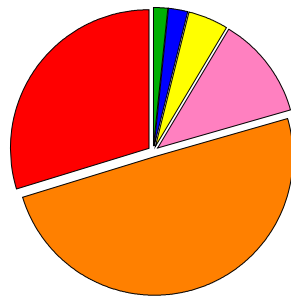
Distribution of Responses: Package Type Frequency - Perishables Requiring Refrigeration

Responses	2017 Responses	2017 Percent (%)	2015 Percent (%)
More than once a week	3,642	3%	--
Once a week	5,588	5%	--
Several times a month	6,407	6%	--
Once a month	7,758	7%	--
Less than once a month	22,120	21%	--
Never	61,774	58%	--

Total Responses: 107,289

Package Services

Question : Package Type Frequency - Oversized or Heavy Objects
Question Text : Please indicate how often you receive packages that contain oversized or heavy objects.



More than once a week	1.6%
Once a week	2.2%
Several times a month	4.7%
Once a month	12.0%
Less than once a month	49.6%
Never	29.8%
Total:	100.0%

Distribution of Responses: Package Type Frequency - Oversized or Heavy Objects

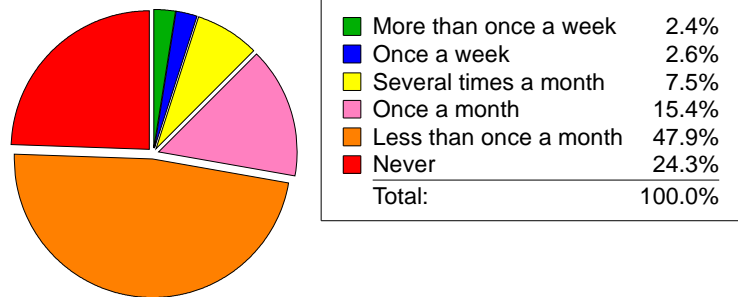
Responses	2017 Responses	2017 Percent (%)	2015 Percent (%)
More than once a week	1,727	2 %	--
Once a week	2,327	2 %	--
Several times a month	4,945	5 %	--
Once a month	12,548	12 %	--
Less than once a month	52,088	50 %	--
Never	31,295	30 %	--

Total Responses: 104,930

Package Services

Question : Package Type Frequency - High Value Objects That Require Signature

Question Text : Please indicate how often you receive packages that contain high value objects that require signature.



Distribution of Responses: Package Type Frequency - High Value Objects That Require Signature

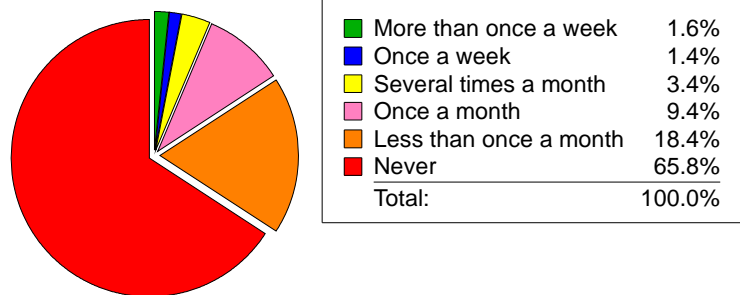
Responses	2017 Responses	2017 Percent (%)	2015 Percent (%)
More than once a week	2,525	2 %	--
Once a week	2,722	3 %	--
Several times a month	7,848	7 %	--
Once a month	16,178	15 %	--
Less than once a month	50,440	48 %	--
Never	25,618	24 %	--

Total Responses: 105,331

Package Services

Question : Package Type Frequency - Medication

Question Text : Please indicate how often you receive packages that contain medication.



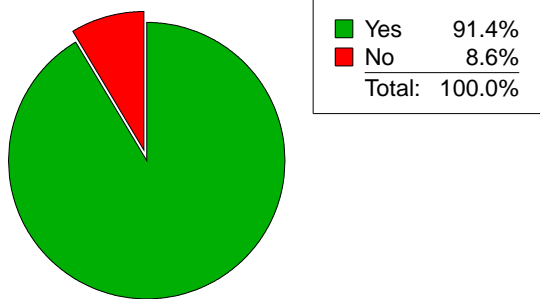
Distribution of Responses: Package Type Frequency - Medication

Responses	2017 Responses	2017 Percent (%)	2015 Percent (%)
More than once a week	1,707	2 %	--
Once a week	1,463	1 %	--
Several times a month	3,533	3 %	--
Once a month	9,804	9 %	--
Less than once a month	19,282	18 %	--
Never	68,997	66 %	--

Total Responses: 104,786

Fitness Services

Question : Fitness Center
Question Text : Does your community have a fitness center?



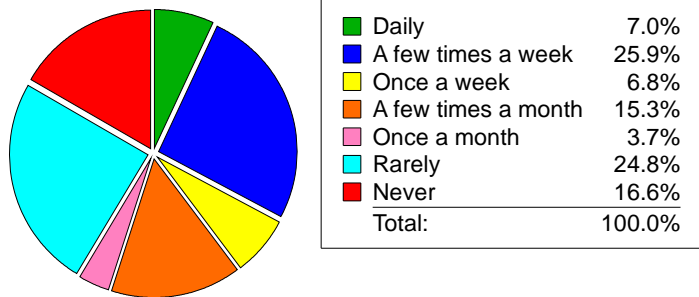
Distribution of Responses: Fitness Center

Responses	2017 Responses	2017 Percent (%)	2015 Percent (%)
Yes	102,561	91 %	--
No	9,601	9 %	--

Total Responses: 112,162

Fitness Services

Question : Fitness Center Usage
Question Text : **How often do you use the community fitness center?**
This question was only asked to residents who indicated that their community has a fitness center.



Distribution of Responses: Fitness Center Usage

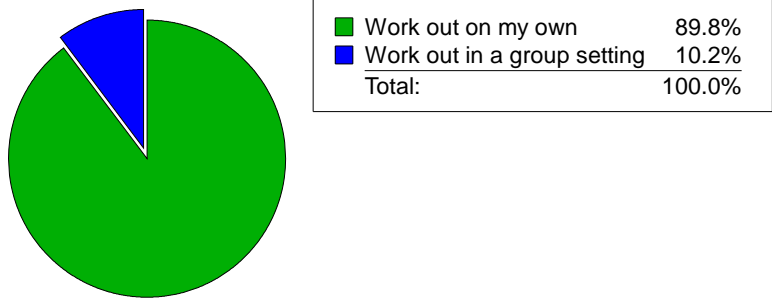
Responses	2017 Responses	2017 Percent (%)	2015 Percent (%)
Daily	7,153	7 %	--
A few times a week	26,383	26 %	--
Once a week	6,934	7 %	--
A few times a month	15,587	15 %	--
Once a month	3,733	4 %	--
Rarely	25,272	25 %	--
Never	16,880	17 %	--

Total Responses: 101,942

Fitness Services

Question : Workout Routine

Question Text : Which of the following best describes the way you usually work out?



Distribution of Responses: Workout Routine

Responses	2017 Responses	2017 Percent (%)	2015 Percent (%)
Work out on my own	96,986	90 %	--
Work out in a group setting	11,033	10 %	--

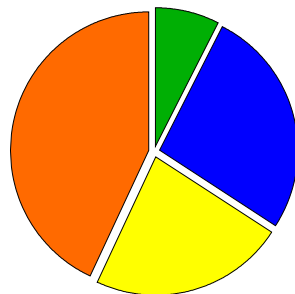
Total Responses: 108,019

Fitness Services

Question : Fitness Class Preference

Question Text : Which of the following fitness class options would you prefer at your community?

This question was only asked to residents who indicated that their community has a fitness center.



Virtual / on-demand classes	7.6%
Classes taught by an instructor	26.5%
Both virtual and in-person classes	22.9%
Not interested in fitness classes	43.0%
Total:	100.0%

Distribution of Responses: Fitness Class Preference

Responses	2017 Responses	2017 Percent (%)	2015 Percent (%)
Virtual / on-demand classes	7,522	8 %	--
Classes taught by an instructor	26,330	26 %	--
Both virtual and in-person classes	22,745	23 %	--
Not interested in fitness classes	42,764	43 %	--

Total Responses: 99,361

Apartment Search & Lease Decision Factors



Lease Decision Factors

Question : Reason for Renting

Question Text : Please indicate your top reason for renting.

Distribution of Responses: Reason for Renting

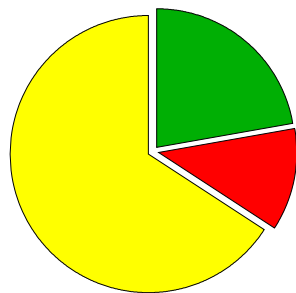
Responses	2017 Responses	2017 Percent (%)	2015 Percent (%)
Convenience and flexibility	24,343	23 %	--
Recently moved to the area	11,569	11 %	--
Renting between home ownership	8,967	8 %	--
I like the amenities	7,885	7 %	--
Avoiding maintenance costs of homeownership	11,093	10 %	--
I can't find a home I want to buy	4,108	4 %	--
I can't afford to buy here	7,806	7 %	--
Avoiding financial risk of buying a home	4,220	4 %	--
Not enough saved for a down payment	18,705	18 %	--
Other	7,731	7 %	--

Total Responses: 106,427

Lease Decision Factors

Question : Impact of Pet-friendliness on Leasing Decision

Question Text : **If a community were pet-friendly, how would that impact your leasing decision?**
This question was only asked to residents who indicated that they were not a pet owner.



More likely to live there	22.1%
Less likely to live there	12.0%
No impact on my leasing decision	65.8%
Total:	100.0%

Distribution of Responses: Impact of Pet-friendliness on Leasing Decision

Responses	2017 Responses	2017 Percent (%)	2015 Percent (%)
More likely to live there	36,926	22 %	--
Less likely to live there	20,048	12 %	--
No impact on my leasing decision	109,843	66 %	--

Total Responses: 166,817

Lease Decision Factors

Question : Reasons Why Less Likely to Choose Pet-friendly Community

Question Text : **Why would you be less likely to choose a pet-friendly community?**
This question was only asked to residents who indicated that they were less likely to lease at a pet-friendly community.

Responses	2017 Responses	2017 Percent (%)	2015 Percent (%)
Residents not cleaning up after pets	15,351	77%	--
Pet-related noise	9,977	50%	--
Pet-related smell	9,743	49%	--
Pet allergies	4,909	25%	--
Fear of animals	3,140	16%	--
Other	1,659	8%	--

The table is sorted from highest to lowest number of responses. The sum of the percentages may total more than 100% due to multiple responses.

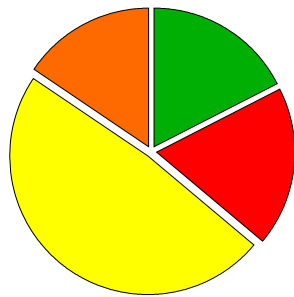
Lease Decision Factors
Rating Areas

Respondents were asked to rank the top factors influencing their decision to lease at their current apartment. In the table below, the "Top 2 Mentions" column represents the aggregation of 1st and 2nd highest rankings for the response category. Answers are sorted so that those options which residents rank highest are at the top.

Responses	Average Rank	Count	Top 2 Mentions (%)	% 1st	% 2nd	% 3rd	% 4th	%5th+
Proximity to Work / Office	3.81	98,270	54%	40%	14%	7%	6%	33%
Proximity to Grocery Store	4.59	98,270	23%	6%	17%	19%	16%	42%
Proximity to Local Businesses	5.58	98,270	14%	5%	9%	12%	14%	60%
Walkability of Area	5.59	98,270	22%	10%	12%	11%	10%	57%
Proximity to Restaurants	5.66	98,270	12%	3%	9%	12%	14%	62%
Proximity to Parks	6.83	98,270	8%	3%	5%	7%	8%	77%
Proximity to Family	6.94	98,270	18%	9%	9%	6%	6%	70%
Proximity to Entertainment / Nightlife	6.95	98,270	9%	3%	6%	7%	8%	76%
Proximity to Medical Care / Hospital	7.24	98,270	6%	2%	4%	6%	7%	81%
Access to Public Transportation	7.68	98,270	11%	5%	6%	6%	5%	78%
Quality of Schools	8.55	98,270	13%	8%	5%	4%	3%	80%
Proximity to College / University	8.59	98,270	9%	5%	4%	3%	3%	85%

Lease Decision Factors

Question : Impact of Short-term Rentals on Leasing Decision
Question Text : If you knew that a community allowed residents to list their apartments on short term rental websites, how would that affect your opinion of the community?



■ Positively affect my opinion	17.5%
■ Negatively affect my opinion	18.5%
■ Have no effect on my opinion	48.2%
■ I would not rent at the community	15.7%
Total:	100.0%

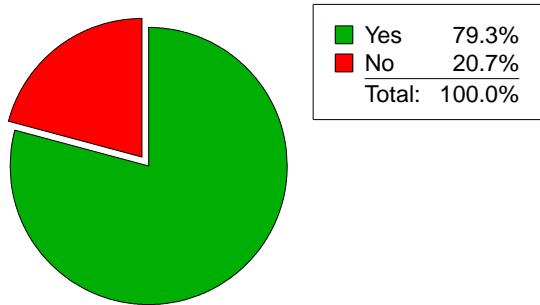
Distribution of Responses: Impact of Short-term Rentals on Leasing Decision

Responses	2017 Responses	2017 Percent (%)	2015 Percent (%)
Positively affect my opinion	18,450	18 %	--
Negatively affect my opinion	19,507	19 %	--
Have no effect on my opinion	50,743	48 %	--
I would not rent at the community	16,493	16 %	--

Total Responses: 105,193

Apartment Search

Question : Visited Community / Company Website
Question Text : In your most recent apartment search, did you visit the community / company website?

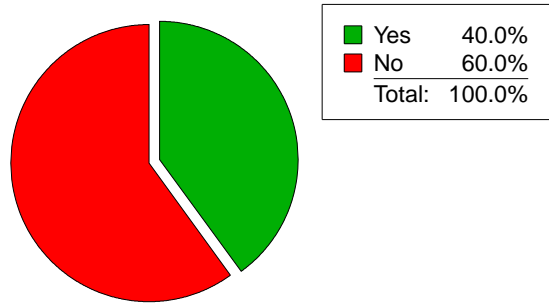


Distribution of Responses: Visited Community / Company Website

Responses	2017 Responses	2017 Percent (%)	2015 Percent (%)
Yes	160,576	79 %	80 %
No	41,920	21 %	20 %
Total Responses:	202,496		98,273

Apartment Search

Question : Visited Community Social Media Websites
Question Text : In your most recent apartment search, did you visit the community social media websites?

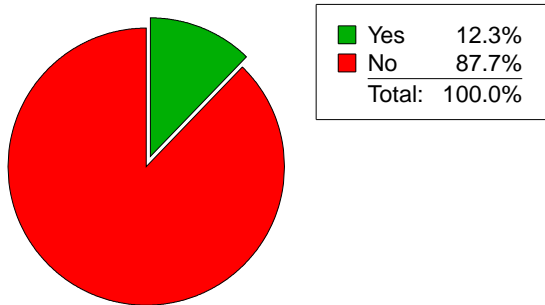


Distribution of Responses: Visited Community Social Media Websites

Responses	2017 Responses	2017 Percent (%)	2015 Percent (%)
Yes	79,606	40 %	36 %
No	119,506	60 %	64 %
Total Responses:	199,112		97,276

Apartment Search

Question : Used Broker, Locator Service, or Realtor
Question Text : In your most recent apartment search, did you use a broker, locator service, or realtor?



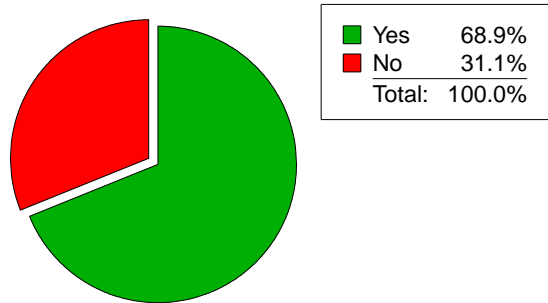
Distribution of Responses: Used Broker, Locator Service, or Realtor

Responses	2017 Responses	2017 Percent (%)	2015 Percent (%)
Yes	24,351	12 %	--
No	173,944	88 %	--

Total Responses: 198,295

Apartment Search

Question : Visited Apartment Listing Site
Question Text : In your most recent apartment search, did you visit an apartment listing site such as Apartments.com, Rent.com, etc.?



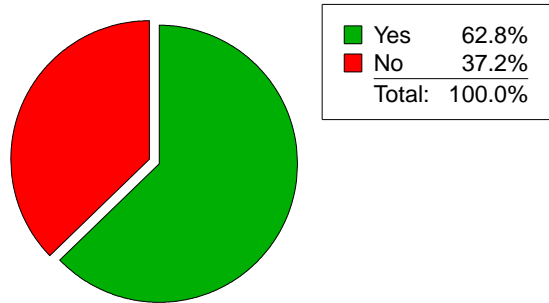
Distribution of Responses: Visited Apartment Listing Site

Responses	2017 Responses	2017 Percent (%)	2015 Percent (%)
Yes	137,392	69 %	--
No	62,015	31 %	--

Total Responses: 199,407

Apartment Search

Question : Referenced Apartment Opinion Sites
Question Text : In your most recent apartment search, did you reference apartment opinion sites?



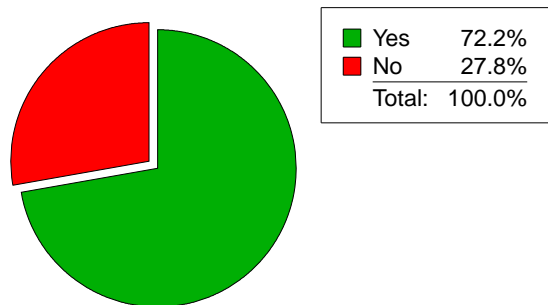
Distribution of Responses: Referenced Apartment Opinion Sites

Responses	2017 Responses	2017 Percent (%)	2015 Percent (%)
Yes	124,795	63 %	66 %
No	73,855	37 %	34 %
Total Responses:	198,650		97,194

Apartment Search

Question : Opinion Sites Stopped Me from Visiting a Community

Question Text : In your most recent apartment search, did the content of the opinion sites stop you from visiting any specific communities?
This question was only asked to residents who indicated that they referenced apartment opinion sites during their most recent apartment search.



Distribution of Responses: Opinion Sites Stopped Me from Visiting a Community

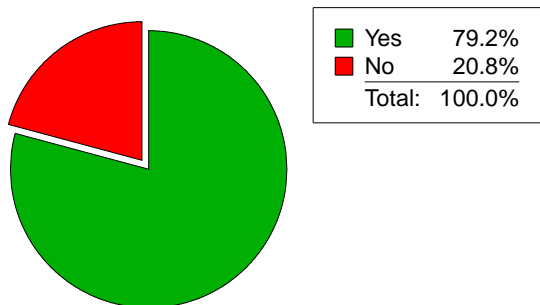
Responses	2017 Responses	2017 Percent (%)	2015 Percent (%)
Yes	89,650	72 %	--
No	34,480	28 %	--

Total Responses: 124,130

Apartment Search

Question : Opinion Sites Influenced Current Lease Decision

Question Text : In your most recent apartment search, did the content of the apartment opinion sites influence your leasing decision?
This question was only asked to residents who indicated that they referenced apartment opinion sites during their most recent apartment search.



Distribution of Responses: Opinion Sites Influenced Current Lease Decision

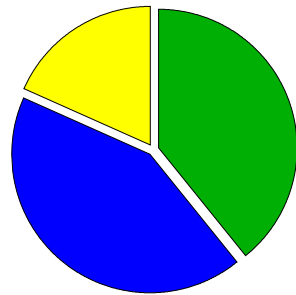
Responses	2017 Responses	2017 Percent (%)	2015 Percent (%)
Yes	98,181	79 %	--
No	25,859	21 %	--

Total Responses: 124,040

Apartment Search

Question : Management Response to Reviews

Question Text : **When visiting an opinion site, which of the following is true regarding management response to reviews?**
This question was only asked to residents who indicated that they referenced apartment opinion sites during their most recent apartment search.



Expect to see responses to negative reviews	39.1%
Expect to see responses to all reviews	42.5%
Do not expect to see responses to any reviews	18.4%
Total:	100.0%

Distribution of Responses: Management Response to Reviews

Responses	2017 Responses	2017 Percent (%)	2015 Percent (%)
Expect to see responses to negative reviews	48,078	39 %	--
Expect to see responses to all reviews	52,251	42 %	--
Do not expect to see responses to any reviews	22,674	18 %	--

Total Responses: 123,003

Apartment Search

Question : Community Visit Factors

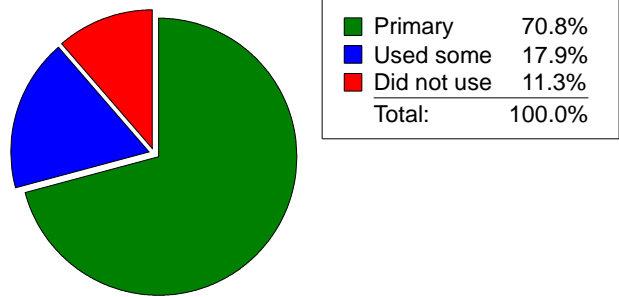
Question Text : Which of the following factors helped you decide to visit a community?

Responses	2017 Responses	2017 Percent (%)	2015 Percent (%)
Location / convenience	162,278	80 %	--
Rental rate	145,718	72 %	--
Floor plan / layout of apartment	133,030	65 %	--
Apartment features / finishes	122,642	60 %	--
Community appearance	121,700	60 %	--
Safety / security of the community	114,133	56 %	--
Community amenities	97,847	48 %	--
Lease terms	76,458	38 %	--
Content of online ratings / reviews	70,072	34 %	--
Pet policy	66,186	33 %	--
Friends / family recommendation	40,694	20 %	--
Other	8,974	4 %	--

The table is sorted from highest to lowest number of responses. The sum of the percentages may total more than 100% due to multiple responses.

Apartment Search

Question : Search Platform Used - Laptop / Desktop
Question Text : How extensively did you use a laptop / desktop in your most recent apartment search?

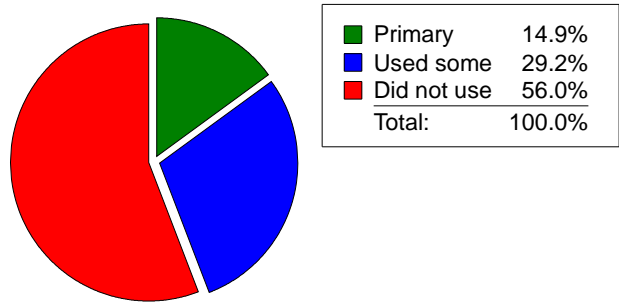


Distribution of Responses: Search Platform Used - Laptop / Desktop

Responses	2017 Responses	2017 Percent (%)	2015 Percent (%)
Primary	140,652	71 %	75 %
Used some	35,470	18 %	16 %
Did not use	22,402	11 %	9 %
Total Responses:	198,524		93,542

Apartment Search

Question : Search Platform Used - Tablet
Question Text : How extensively did you use a tablet in your most recent apartment search?

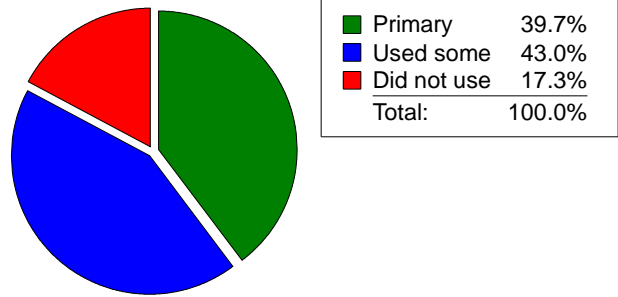


Distribution of Responses: Search Platform Used - Tablet

Responses	2017 Responses	2017 Percent (%)	2015 Percent (%)
Primary	27,148	15 %	20 %
Used some	53,283	29 %	32 %
Did not use	102,168	56 %	48 %
Total Responses:	182,599		80,704

Apartment Search

Question : Search Platform Used - Smart Phone
Question Text : How extensively did you use a smart phone in your most recent apartment search?



Distribution of Responses: Search Platform Used - Smart Phone

Responses	2017 Responses	2017 Percent (%)	2015 Percent (%)
Primary	74,776	40 %	35 %
Used some	80,875	43 %	42 %
Did not use	32,606	17 %	23 %
Total Responses:	188,257		86,877

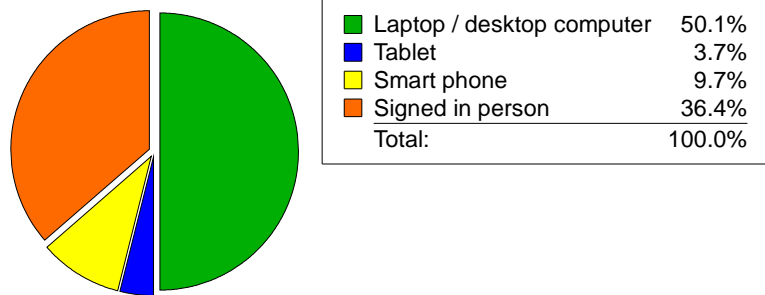
Online Services, Community Website, and Resident Portal



Online Services

Question : Lease Signing Method

Question Text : Which of the following did you use to sign your current lease?



Distribution of Responses: Lease Signing Method

Responses	2017 Responses	2017 Percent (%)	2015 Percent (%)
Laptop / desktop computer	50,966	50 %	--
Tablet	3,784	4 %	--
Smart phone	9,899	10 %	--
Signed in person	37,041	36 %	--

Total Responses: 101,690

Online Services

Question : Ease of Online Application and Leasing Process

Question Text : **How easy was the online application and leasing process?**
This question was only asked to residents who indicated that they signed their lease online.



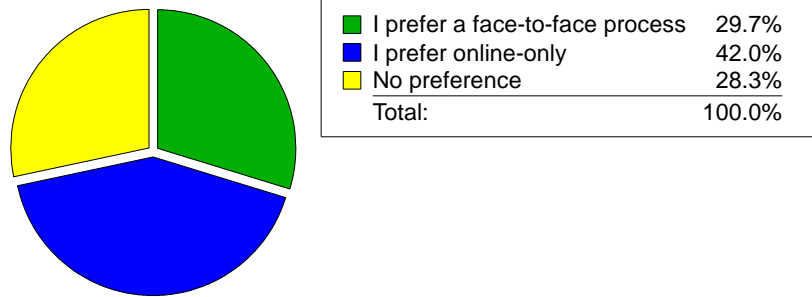
Distribution of Responses: Ease of Online Application and Leasing Process

Responses	2017 Responses	2017 Percent (%)	2015 Percent (%)
Very easy	35,309	55 %	--
Somewhat easy	17,590	28 %	--
Average	8,592	13 %	--
Somewhat hard	1,739	3 %	--
Very hard	469	1 %	--

Total Responses: 63,699

Online Services

Question : Electronic vs. In-person Renewal Process
Question Text : Given the choice, would you prefer to fill out the renewal contract online or go to the office to sign paperwork?



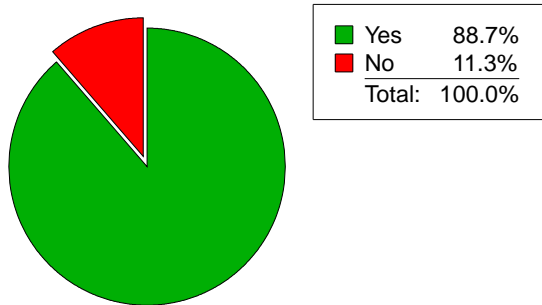
Distribution of Responses: Electronic vs. In-person Renewal Process

Responses	2017 Responses	2017 Percent (%)	2015 Percent (%)
I prefer a face-to-face process	30,143	30 %	31 %
I prefer online-only	42,635	42 %	41 %
No preference	28,747	28 %	28 %
Total Responses:	101,525		47,468

Online Services

Question : Online Resident Portal Available

Question Text : Does your community have an online resident portal where you can communicate with property management?



Distribution of Responses: Online Resident Portal Available

Responses	2017 Responses	2017 Percent (%)	2015 Percent (%)
Yes	89,209	89 %	--
No	11,382	11 %	--

Total Responses: 100,591

Online Services

Question : Current Rent Payment Method

Question Text : What method do you currently use to pay your rent?

Distribution of Responses: Current Rent Payment Method

Responses	2017 Responses	2017 Percent (%)	2015 Percent (%)
Auto-bill pay	25,525	25 %	--
Mailed-in check	1,765	2 %	--
Hand-delivered check	15,913	16 %	--
PayPal	196	0 %	--
Credit card with convenience fee	1,386	1 %	--
Credit card without convenience fee	1,870	2 %	--
Debit card with convenience fee	4,153	4 %	--
Debit card without convenience fee	12,963	13 %	--
Electronic check	31,082	30 %	--
Cashier's check	1,834	2 %	--
Money order	4,890	5 %	--
Moneygram / online money order	666	1 %	--

Total Responses: 102,243

Online Services

Question : Preferred Rent Payment Method

Question Text : Given the choice, how would you prefer to pay your rent?

Distribution of Responses: Preferred Rent Payment Method

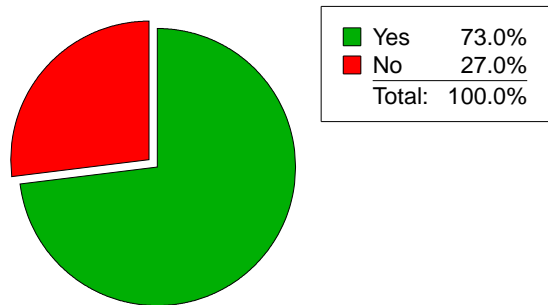
Responses	2017 Responses	2017 Percent (%)	2015 Percent (%)
Auto-bill pay	26,160	26 %	--
Mailed-in check	1,190	1 %	--
Hand-delivered check	8,528	8 %	--
PayPal	1,521	2 %	--
Credit card without convenience fee	16,398	16 %	--
Debit card without convenience fee	25,592	25 %	--
Electronic check	18,666	18 %	--
Cashier's check	773	1 %	--
Money order	2,058	2 %	--
Moneygram / online money order	297	0 %	--

Total Responses: 101,183

Online Services

Question : Property Management App

Question Text : If your property management had an app, would you use it?



Distribution of Responses: Property Management App

Responses	2017 Responses	2017 Percent (%)	2015 Percent (%)
Yes	73,644	73 %	--
No	27,202	27 %	--

Total Responses: 100,846

Community Webpage Features - Importance
 Rating Areas

Community Webpage: Respondents were asked to indicate the importance of various community webpage features during their apartment search. Answers are sorted in descending order, so that those features that residents find most important are at the top.

Scale: 1 = Not at all important, 2 = Unimportant, 3 = Neutral, 4 = Important, 5 = Very important

Amenity / Feature	Mean	% 4s / 5s	
		2015	2017
Specific Floor Plan Pricing	4.57	--	89%
Floor Plans with Price Ranges	4.50	--	87%
Availability of Specific Floor Plan Types	4.40	--	83%
Interior Photos of Different Models	4.39	--	84%
Unit Selection	4.30	--	81%
Lease Agreement	4.23	--	79%
Pre-qualification Forms	4.20	--	78%
Photos of Common Area Amenities	4.08	--	73%
Resident Feedback / Ratings & Reviews	4.05	--	72%
Link to Resident Portal	4.01	--	70%
Privacy Policy	3.89	--	65%
Interior Videos of Different Models	3.76	--	61%
Schedule Appointments	3.76	--	63%
Surrounding Neighborhood Map	3.76	--	62%
Pet Policies	3.63	--	59%
Community Map	3.52	--	54%
3D Floor Plans	3.50	--	52%
Videos of Common Area Amenities	3.38	--	48%
Send Text Message to Management	3.24	--	46%
Information about Green Certifications	3.10	--	37%

*Community Webpage Features - Importance
 Rating Areas, continued*

Amenity / Feature	Mean	% 4s / 5s	
		2015	2017
Information About Sustainability / Green Programs	3.03	--	35%
Links to Social Media Sites	3.01	--	36%
Conduct Webchat with Management	2.73	--	30%

Resident Portal Features - Importance
Rating Areas

Resident Portal: Respondents were asked to indicate the importance of various resident portal features. Answers are sorted in descending order, so that those features that residents find most important are at the top.

Scale: 1 = Not at all important, 2 = Unimportant, 3 = Neutral, 4 = Important, 5 = Very important

Amenity / Feature	Mean	% 4s / 5s	
		2015	2017
Maintenance Requests	4.67	--	92%
Rent Payment	4.63	--	90%
Ability to Review My Accounts Payable History	4.46	--	85%
Contact Staff / Management	4.45	--	85%
Ability to Review My Lease Document	4.43	--	85%
Lease Renewal	4.23	--	78%
Ability to Access from Mobile Devices	4.21	--	77%
Reservations for Community Facilities	3.80	--	64%
Event Calendar	3.65	--	57%
Community Forum	3.39	--	49%

Communication



Communication

Question : Preferred Communication Method(s)

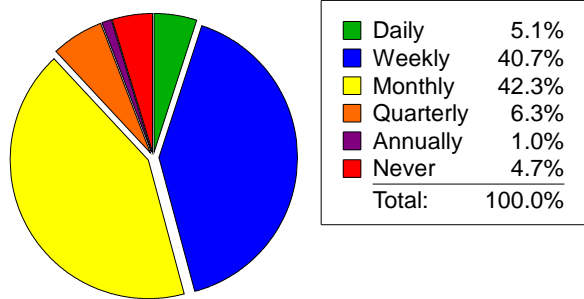
Question Text : How do you prefer to receive information from management?

Responses	2017 Responses	2017 Percent (%)	2015 Percent (%)
Email	91,042	89%	87%
Text message	30,907	30%	29%
Telephone	20,352	20%	8%
Written letter / memo	16,591	16%	16%
Posted notice / flyer	13,592	13%	30%
Newsletter	9,388	9%	20%
Internet / social media site	4,456	4%	14%
Other	1,721	2%	1%

The table is sorted from highest to lowest number of responses. The sum of the percentages may total more than 100% due to multiple responses.

Communication

Question : Preference - Receive Community Information
Question Text : How often do you want to receive communication regarding non-emergency community information?



Distribution of Responses: Preference - Receive Community Information

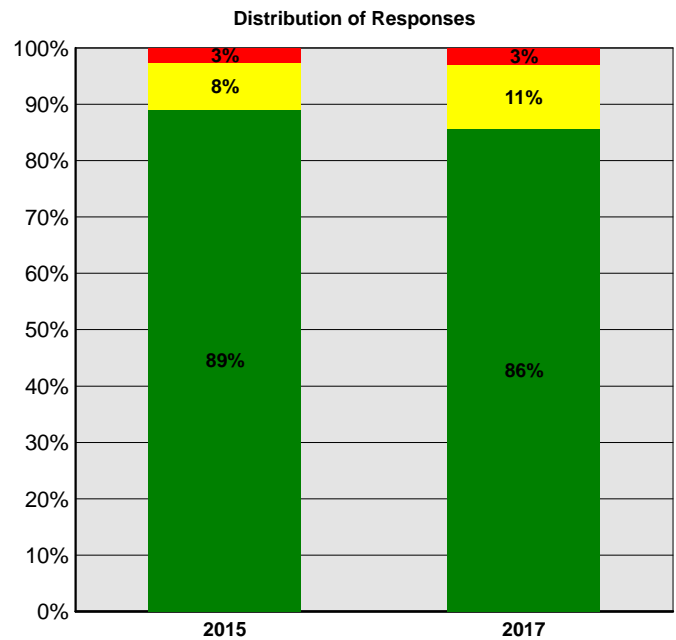
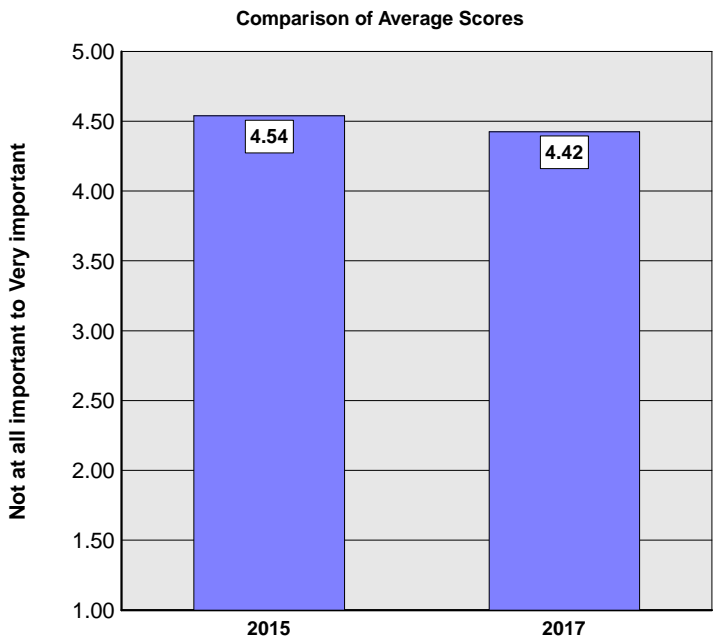
Responses	2017 Responses	2017 Percent (%)	2015 Percent (%)
Daily	5,112	5 %	--
Weekly	41,081	41 %	--
Monthly	42,692	42 %	--
Quarterly	6,361	6 %	--
Annually	1,019	1 %	--
Never	4,741	5 %	--

Total Responses: 101,006

Communication

Question : Importance of Walkthrough at Move-in
Question Text : How important is a walkthrough with a community representative at move-in?

■ 1 = Not at all important
■ 2 = Unimportant
■ 3 = Neutral
■ 4 = Important
■ 5 = Very important

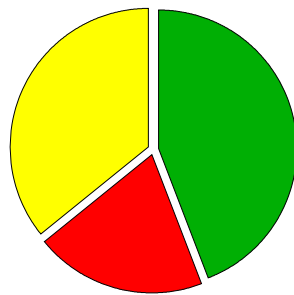


Importance of Walkthrough at Move-in	Number of Responses	Average Rating	Not Important		Neutral	Important	
			1	2	3	4	5
NMHC 2015	48,128	4.54	1%	1%	8%	21%	68%
NMHC 2017	101,429	4.42	1%	2%	11%	25%	61%

Communication

Question : Sharing of Utility Data

Question Text : **Would you be willing to authorize the sharing of your monthly utility bill (i.e., energy, water consumption) with management in order to evaluate your building’s overall energy performance?**



Yes	44.3%
No	19.8%
Not sure, would need additional information	35.9%
Total:	100.0%

Distribution of Responses: Sharing of Utility Data

Responses	2017 Responses	2017 Percent (%)	2015 Percent (%)
Yes	44,614	44 %	--
No	19,986	20 %	--
Not sure, would need additional information	36,201	36 %	--

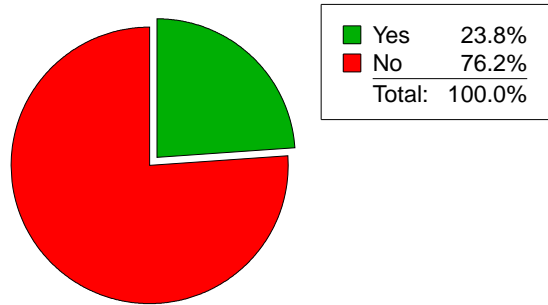
Total Responses: 100,801

Community Online Presence



Community Online Presence

Question : Engagement with Social Media
Question Text : Do you engage with community-specific social sites (e.g., community forum, Facebook, Twitter)?



Distribution of Responses: Engagement with Social Media

Responses	2017 Responses	2017 Percent (%)	2015 Percent (%)
Yes	24,022	24 %	--
No	76,930	76 %	--

Total Responses: 100,952

Community Online Presence

Question : Use of Community Social Media Sites

Question Text : **When you engage with community-specific social sites, which sites do you use?**
This question was only asked to residents who indicated that they engage with community-specific social media sites.

Responses	2017 Responses	2017 Percent (%)	2015 Percent (%)
Community Facebook page	13,944	62%	--
Community forum / website	10,845	48%	--
Community Twitter page	1,657	7%	--
Other	1,343	6%	--

The table is sorted from highest to lowest number of responses. The sum of the percentages may total more than 100% due to multiple responses.

Community Online Presence
 Rating Areas

Community Facebook Page: Respondents that indicated they use their community's Facebook page were asked to rate their satisfaction with it. Answers are sorted in descending order, so that those features that residents are most satisfied with are at the top.

Scale: 1 = Poor, 2 = Fair, 3 = Average, 4 = Good, 5 = Excellent

Amenity / Feature	Mean	% 4s / 5s	
		2015	2017
Professionalism	3.91	--	67%
Ease of Finding Information	3.72	--	59%
Overall Content	3.68	--	58%
Entertainment	3.56	--	53%
Frequency of Updates	3.54	--	52%

Connectivity



Connectivity

Question : Home Entertainment - Current Video Media Sources

Question Text : How do you currently get your video entertainment while at home?

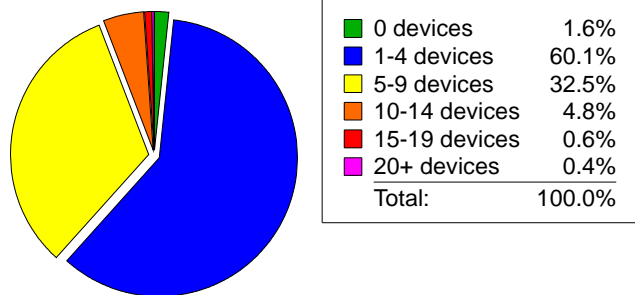
Responses	2017 Responses	2017 Percent (%)	2015 Percent (%)
Cable	56,945	57%	67%
Streaming Online	53,423	53%	50%
HD Digital Antenna	7,468	7%	6%
Satellite	5,245	5%	6%

The table is sorted from highest to lowest number of responses. The sum of the percentages may total more than 100% due to multiple responses.

Connectivity

Question : Number of Internet Connected Devices

Question Text : How many internet connected devices do you have in your household (e.g., computers, phones, tablets, Apple TVs, Nests, Sonos)?



Distribution of Responses: Number of Internet Connected Devices

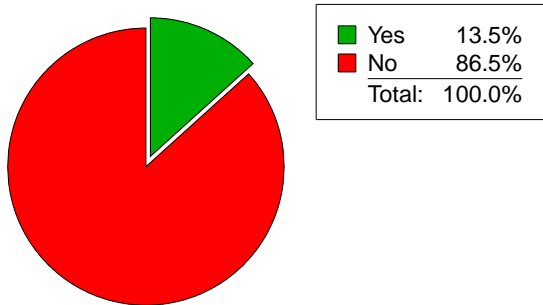
Responses	2017 Responses	2017 Percent (%)	2015 Percent (%)
0 devices	1,602	2 %	--
1-4 devices	59,174	60 %	--
5-9 devices	31,992	32 %	--
10-14 devices	4,706	5 %	--
15-19 devices	590	1 %	--
20+ devices	394	0 %	--

Total Responses: 98,458

Connectivity

Question : Importance of Landline

Question Text : Is it important for you to be able to have a landline in your apartment?



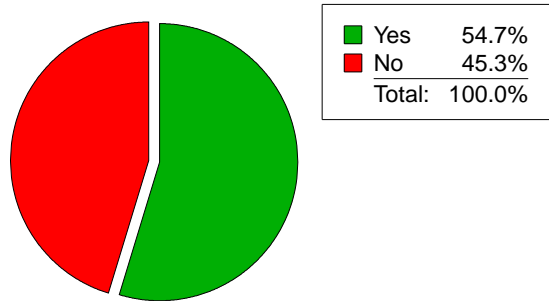
Distribution of Responses: Importance of Landline

Responses	2017 Responses	2017 Percent (%)	2015 Percent (%)
Yes	13,429	13 %	--
No	86,255	87 %	--

Total Responses: 99,684

Connectivity

Question : Checked Mobile Phone Connectivity during Tour
Question Text : Did you check the connectivity of your mobile phone while touring apartment communities?

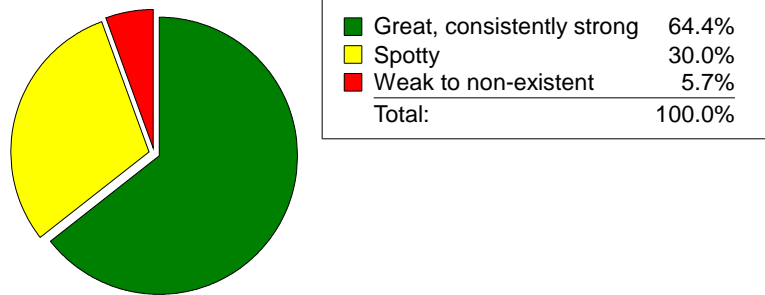


Distribution of Responses: Checked Mobile Phone Connectivity during Tour

Responses	2017 Responses	2017 Percent (%)	2015 Percent (%)
Yes	42,097	55 %	53 %
No	34,798	45 %	47 %
Total Responses:	76,895		36,040

Connectivity

Question : Cell Phone Coverage at Community
Question Text : How would you describe the cellular coverage at your current community?

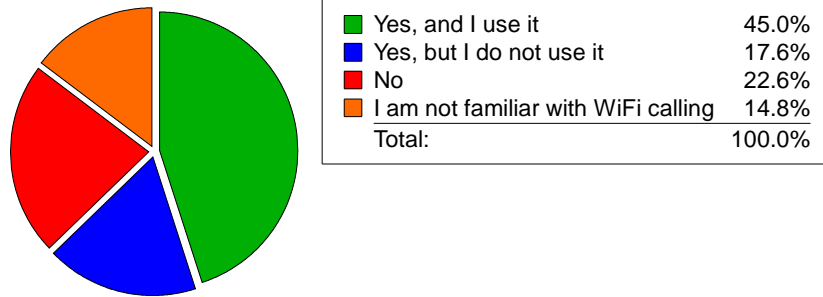


Distribution of Responses: Cell Phone Coverage at Community

Responses	2017 Responses	2017 Percent (%)	2015 Percent (%)
Great, consistently strong	64,173	64 %	68 %
Spotty	29,863	30 %	27 %
Weak to non-existent	5,646	6 %	5 %
Total Responses:	99,682		47,349

Connectivity

Question : WiFi Calling Usage
Question Text : Have you enabled WiFi calling on your phone?



Distribution of Responses: WiFi Calling Usage

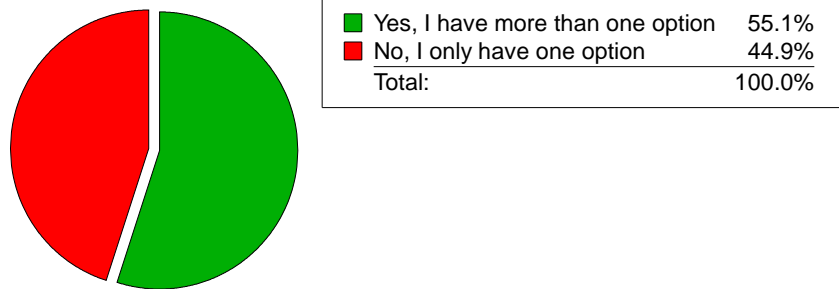
Responses	2017 Responses	2017 Percent (%)	2015 Percent (%)
Yes, and I use it	44,907	45 %	--
Yes, but I do not use it	17,601	18 %	--
No	22,508	23 %	--
I am not familiar with WiFi calling	14,764	15 %	--

Total Responses: 99,780

Connectivity

Question : Choice of Cable and Internet Providers

Question Text : Do you have a choice of cable or internet providers in your community?



Distribution of Responses: Choice of Cable and Internet Providers

Responses	2017 Responses	2017 Percent (%)	2015 Percent (%)
Yes, I have more than one option	54,785	55 %	--
No, I only have one option	44,592	45 %	--

Total Responses: 99,377



Gaining a competitive edge in today's industry requires superior knowledge of residents' needs and demands. Our CORE program provides all the tools for improving the resident experience and driving ROI.

Since 1985, Kingsley has partnered with apartment managers and owners to provide actionable intelligence through tailored survey programs and industry-leading benchmarks. Our insights drive more informed decisions focused on:

Retaining residents

Improving market position

Enhancing operations

Driving employee engagement

MANAGE YOUR ONLINE REPUTATION

We offer a suite of tools to help manage your brand online. Using our programs, you can feed ratings and reviews to:

Community website pages

Facebook pages

Apartment Guide and Rent.com

ApartmentRatings

Other apartment review sites

CONTACT US

www.kingsleyassociates.com

kainfo@kingsleyassociates.com

770.908.1220



CORE PROGRAM

Comprehensive ongoing resident evaluation



PROSPECT
 Measure leasing consultant success



RENEWAL
 Maximize controllable resident retention



MOVE-IN
 Perfect the move-in process



MOVE-OUT
 Determine and quantify why residents vacate



WORK ORDER
 Gauge maintenance tech effectiveness



SAMPLING
 Increase retention and occupancy

4 MILLION RESIDENTS

surveyed on an annual basis and benchmark data from over

100 MULTIFAMILY FIRMS

KEEP PROGRAM

Kingsley employee engagement program

Engaged employees are motivated by your company's success, serve as promoters of your product, and put forth the effort to elevate your firm from good to great. The KEEP program objectively measures employee feedback, identifying strengths and weaknesses, as well as best practices.

