



The Mechanics of

# ONLINE REVIEW SITES

AND INTERNET  
LISTING SERVICES

FOURTEENTH EDITION | Q2 2025



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# Executive Summary

J Turner Research presents the 14th edition of *The Mechanics of Online Review Sites and ILSSs*, the industry's definitive guide to the online review landscape. Our continued, comprehensive analysis provides the most rigorous and insightful data available on resident feedback.

This report, analyzing the first half of 2025, is drawn from our expanded portfolio, which now monitors over 150,400 multifamily properties nationwide. The data confirms the critical role of resident feedback in the rental journey, with 93% (140,402) of all monitored properties having at least one online review.

Our longitudinal tracking reveals a significant recalibration within the digital ecosystem. The total review database now stands at 17,832,772, a figure that reflects the permanent purge of 1,135,225 reviews following the acquisition and consolidation of several key review platforms. This event underscores the inherent volatility of the review landscape and clarifies that the shift in volume is a direct result of market structure, not a decline in renter engagement.

The unparalleled data and strategic insights within this report are essential for benchmarking and navigating these complex market dynamics. For access to our complete research archive, including prior editions of *Mechanics*, visit [jturnerresearch.com/research](https://jturnerresearch.com/research).





# 14th Edition Highlights

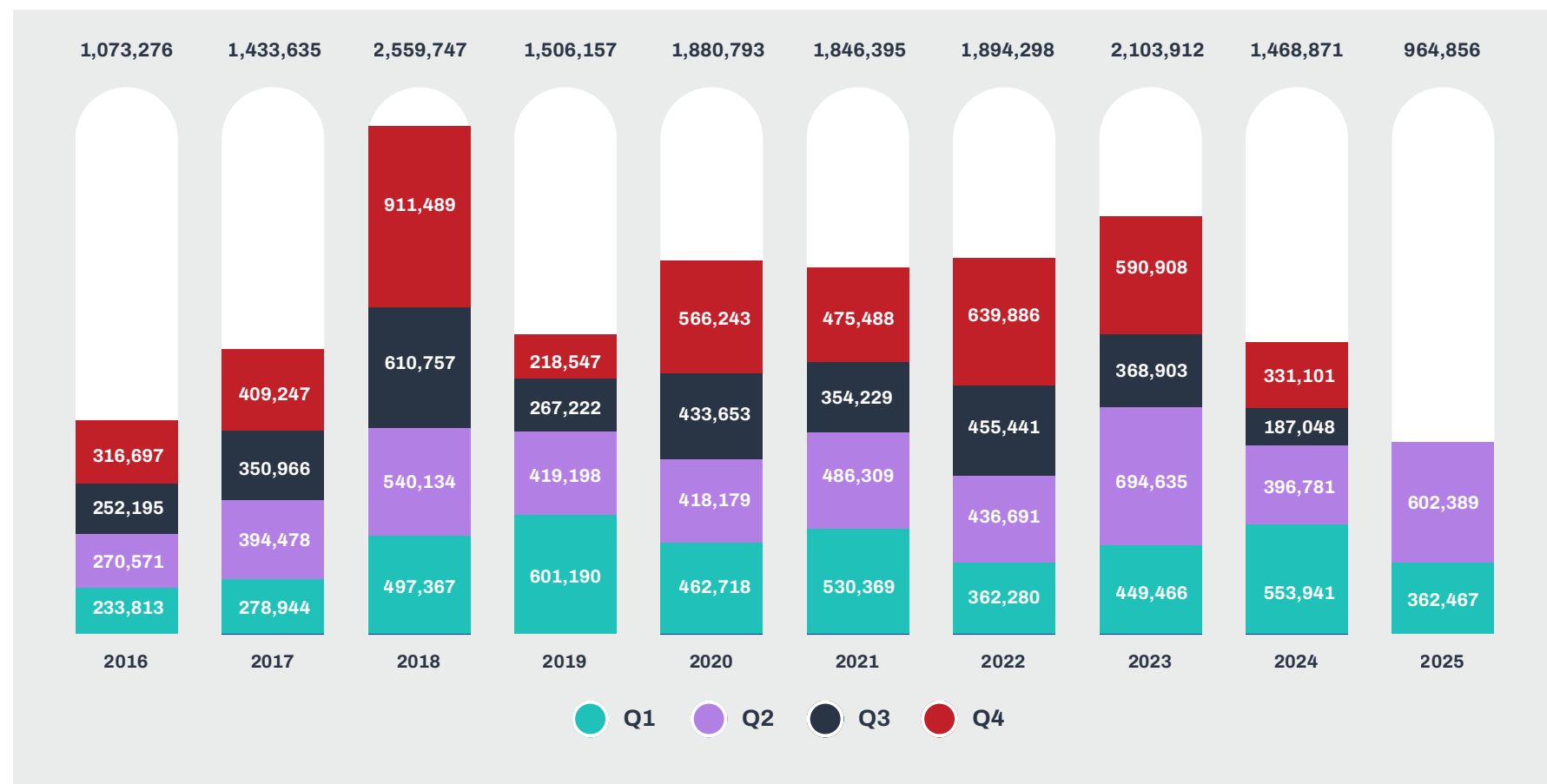
- **The Paradox of Review Volume:** The review landscape was reshaped by the consolidation and removal of over 1.1 million reviews from sunsetted platforms<sup>1</sup>. Despite this, the velocity of new feedback accelerated, with 964,856 new reviews added in the first half of 2025—an increase of nearly 15,000 over the prior year on two fewer platforms.
- **Google's Reign Intensifies:** Google dramatically extended its lead, capturing an unprecedented 74% (717,249) of all new reviews in the first half of the year. This solidifies its position as the primary and most critical forum for resident feedback.
- **A New Market Share Equilibrium:** The long-term power shift has culminated in a new, stable hierarchy. Google's total market share has climbed to 46%, while the removal of defunct ILSs has mathematically redistributed share, cementing the current market structure.
- **The Sentiment Plateau and The Human Factor:** The positive sentiment recovery of 2024 has stalled. This stagnation is driven by a hyper-polarization of feedback around Customer Service and Communication, indicating the human element of property management is now the single most critical driver of resident satisfaction.

<sup>1</sup>Key platforms contributing to this review consolidation included Apartmentguide, Rent., ModernMessage, and Yelp. Additionally, after the data was compiled for this report, Apartments.com decided to remove reviews of non-subscribed members.

# Volume vs. Velocity

The industry's total review database has been reshaped by market consolidation. Following the acquisition and subsequent sunsetting of the Apartmentguide and Rent. review platforms, a one-time purge permanently removed 1,147,544 reviews from the ecosystem. This event adjusts the J Turner Research database—now monitoring an expanded portfolio of over 150,000 properties—to a new total of 17,832,772 reviews.

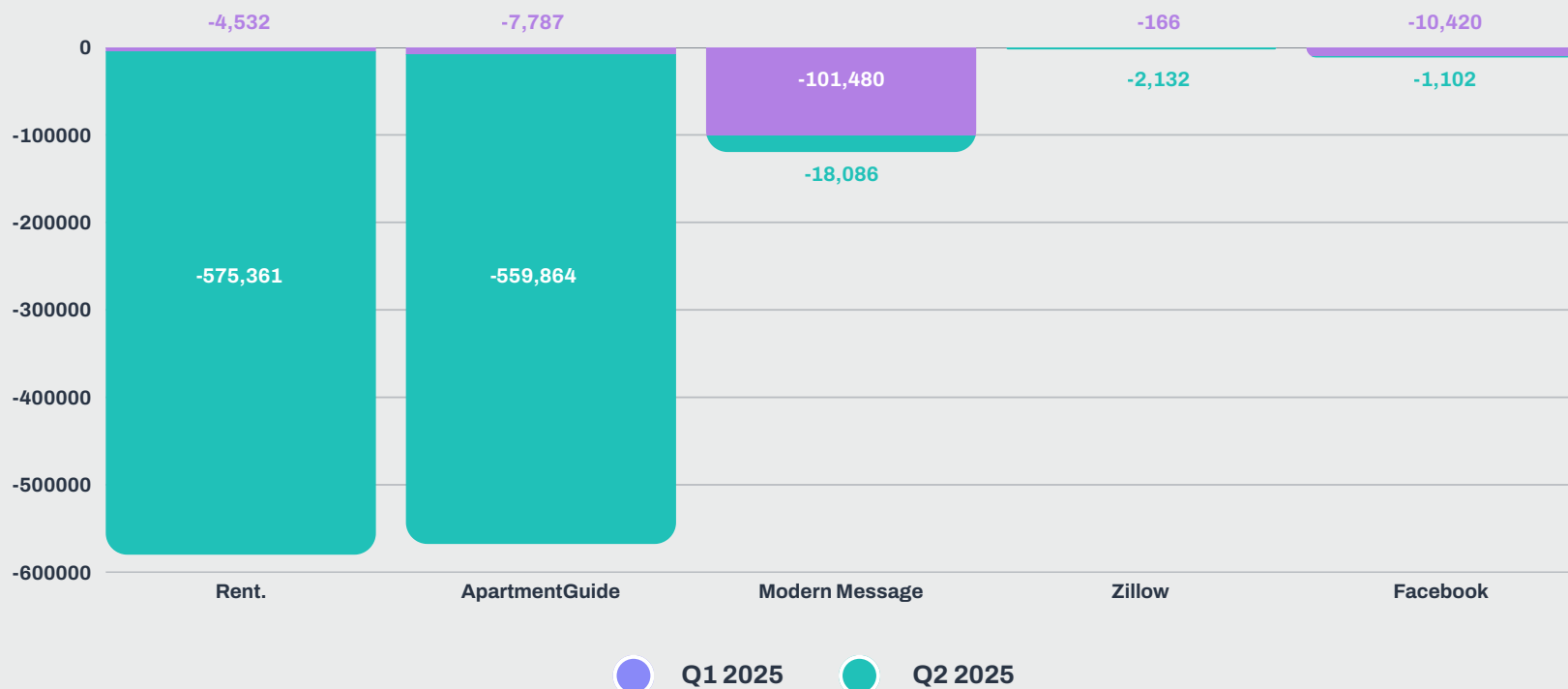
However, this adjustment in aggregate volume masks a more critical trend: the velocity of new resident feedback is accelerating. In the first half of the year alone, 964,856 new reviews were generated. This figure represents a growth of nearly 15,000 reviews over the same period last year, a remarkable feat given the reduced number of platforms. This dynamic proves renter engagement is not in decline; it is simply becoming more concentrated. As a result, the strategic value and visibility of each review on the remaining major sites have been significantly amplified.



# Platform Dynamics and Review Volatility

Ongoing review volatility remains a constant feature of the digital ecosystem, with a total of 1,280,930 reviews removed across all platforms year-to-date. However, the cause of this volatility has fundamentally shifted from moderation and technical adjustments to a more direct, commercial reality. A "pay-to-play" model is now the dominant force, where review history is treated as a feature of a paid contract. As property management companies increasingly focus on cutting operational expenses, their decisions to cancel vendor agreements are now directly causing the removal of their accumulated reviews.

The largest component of this year's removals, 1,135,225 reviews lost with the sunsetting of Rent. and Apartmentguide, perfectly illustrates this new paradigm. Access to that review history was contingent on properties establishing a new paid relationship, and those that opted out lost their reviews. This same principle explains the removal of nearly 120,000 reviews from Modern Message, which stemmed directly from clients ending their subscriptions. This pattern, where non-payment leads to review deletion, is also prevalent on major ILSs like Apartments.com. While some platforms like Meta are removing reviews for strategic reasons, the overarching theme is clear: review volume is now a fluid metric dictated as much by a property's budget and vendor choices as it is by resident feedback itself. For prospects, the content of the reviews is certainly a more important factor than multiple-star ratings of validation.

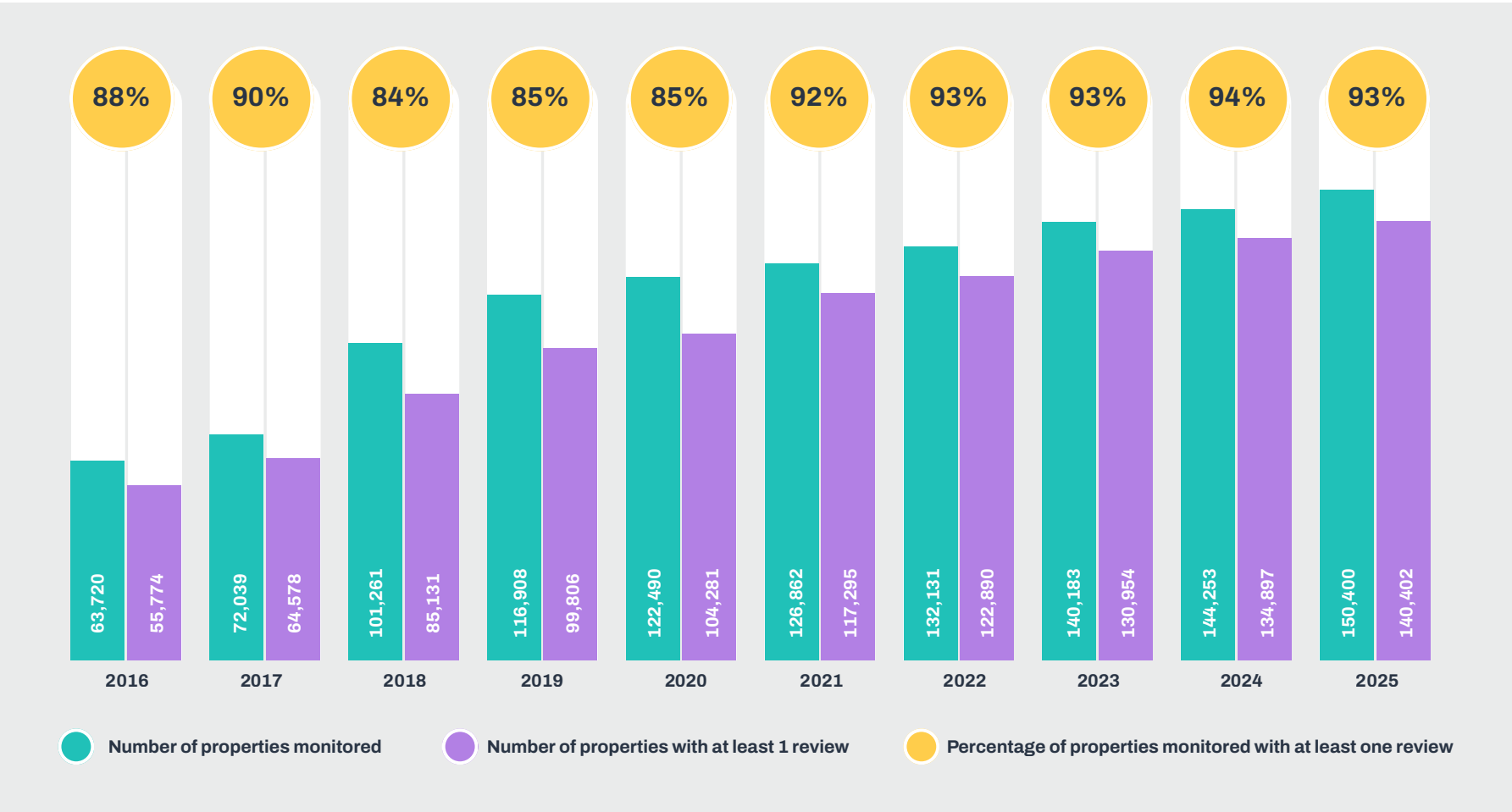




# Review Presence as a Market Standard

While the preceding analysis details significant market volatility and platform-specific dynamics, the pervasiveness of online reviews as a fundamental asset component remains constant. Our comprehensive monitoring of 150,400 properties nationwide confirms that 93% (140,402) maintain at least one online review.

This near-universal adoption establishes a review presence not as a competitive advantage, but as the baseline for market viability. The minor dip in this overall percentage is a direct and expected artifact of platform consolidation, yet it does not detract from the central finding. When considered alongside the accelerating velocity of new reviews, the conclusion is clear: an established review profile is the non-negotiable starting point from which properties must build their reputation. It is the primary digital touchpoint for prospective renters, making its absence a critical vulnerability in today's market.



# A New Per-Property Baseline

The market-wide recalibration logically extends to the metrics of the average property, establishing a new baseline for the first time in over a decade. Our analysis reveals that the average number of reviews per property has adjusted to 137.29, down from 143.63 at year-end 2024. This is the first recorded decrease in this key metric since J Turner Research began tracking it in 2014.

Concurrently, the digital footprint of the average property has become more focused. The number of distinct platforms on which a property has reviews has contracted to 4.1, a predictable shift from the 4.5 average in 2023.

These drops don't mean renter engagement is down. They are the direct result of platform consolidation, which is concentrating renter feedback on fewer, more dominant websites. This concentration of influence makes it strategically essential to build and manage a strong review portfolio on each of these critical platforms.

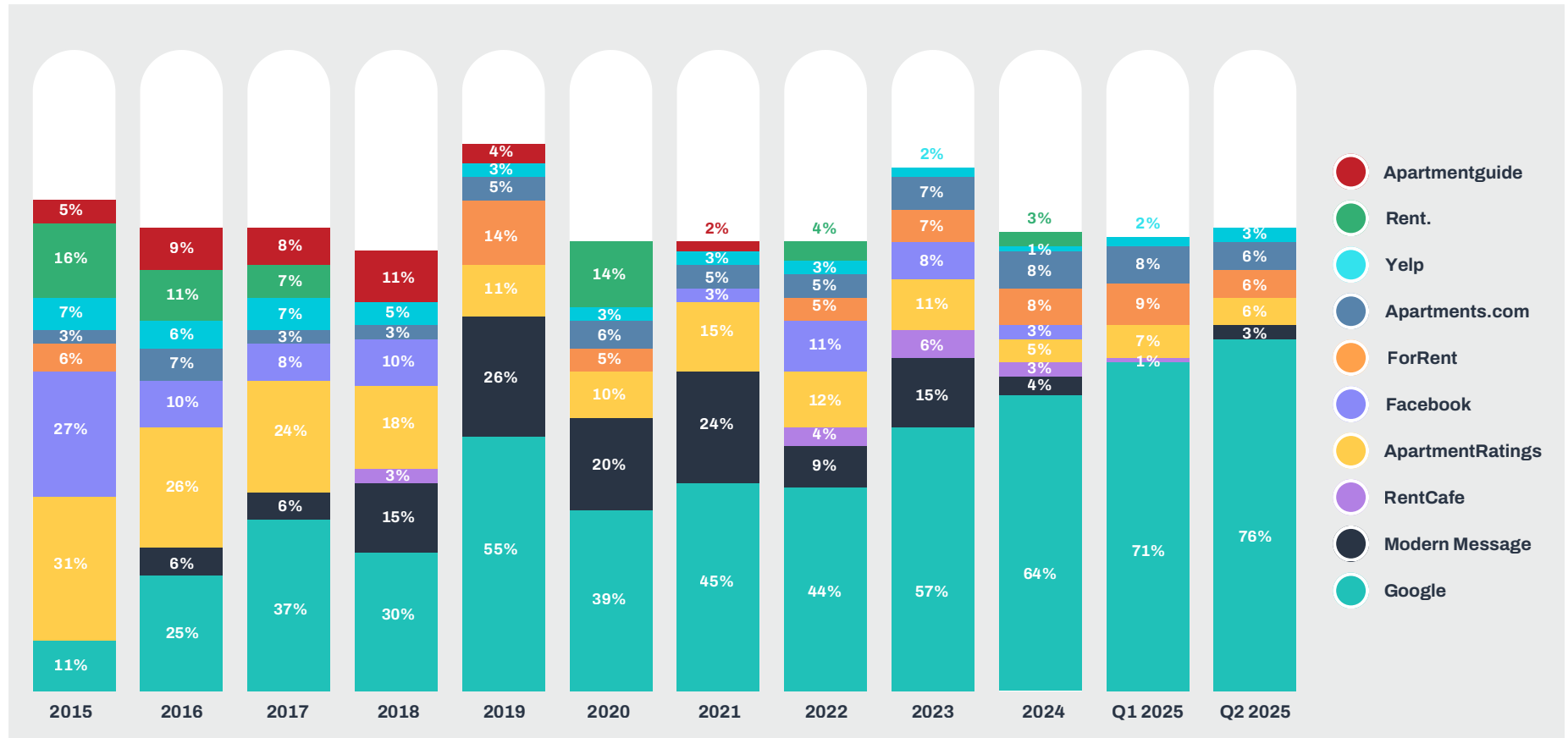


# The Concentration of Influence

The consolidation of the review market has not only reduced the number of platforms but has also intensified the concentration of influence among the remaining leaders. Our analysis of new review generation in the first half of 2025 shows Google has extended its commanding lead, capturing 717,249 of all new reviews. This accounts for an unprecedented 74% of all new renter feedback, solidifying its position as the industry's primary forum.

Following this dominant leader, a distinct second tier of influence has formed. Apartments.com and ForRent.com each contributed approximately 67,000 reviews, representing a 7% share apiece. It remains critical to note, however, that ForRent's volume is largely a function of aggregating reviews from external sources. In terms of organic, platform-native feedback, ApartmentRatings solidifies its position as a key player, contributing over 61,000 new reviews (6%).

This distribution demonstrates that while a multi-platform strategy remains vital, a property's performance on Google is the single most critical determinant of its online reputation in the current market.



\*This graph does not highlight review sites that have a market share of 1% or less as of Q2 2025.

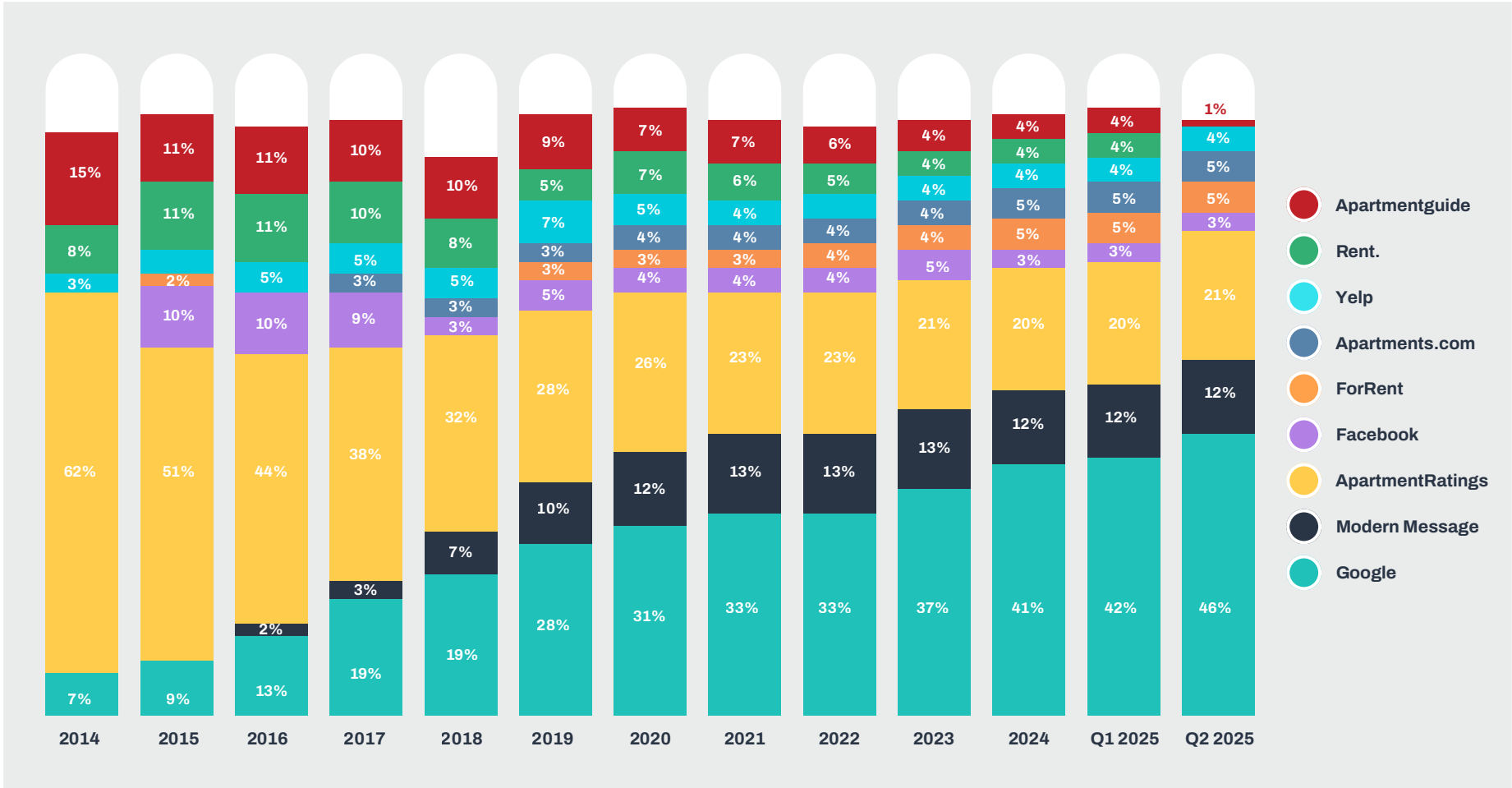
\*Graph does not include all review sites monitored so totals may not equal 100% for a given year.



# Reshaping of Market Share

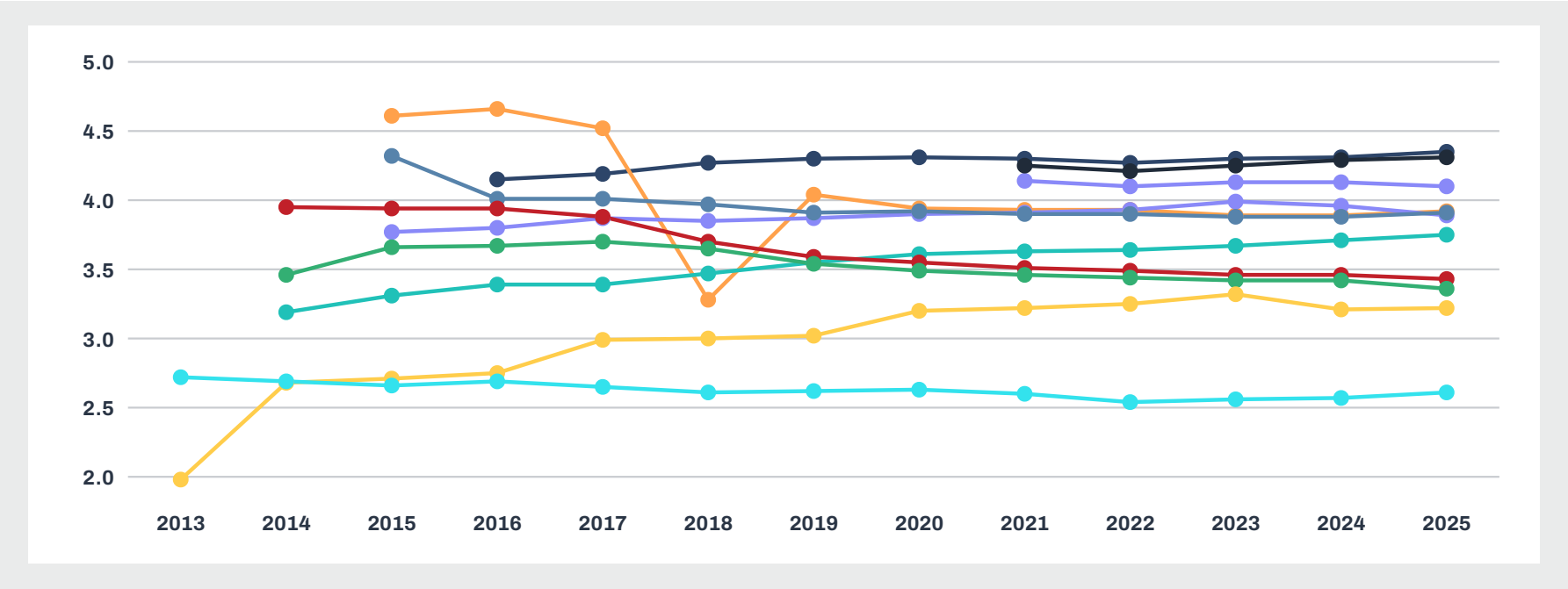
Beyond analyzing the flow of new reviews, a historical analysis of the total review market share reveals the culmination of a decade-long power shift, now accelerated by platform consolidation. Google's ascendancy continues its multi-year trajectory, with its total market share increasing from 41% at year-end 2024 to an industry-defining 46% at mid-year 2025.

Interestingly, ApartmentRatings—a platform that had been experiencing a gradual erosion of its once-dominant share—saw its portion of the market increase from 20% to 21%. This slight growth is a direct consequence of market mechanics; the removal of over a million reviews from the now-defunct Rent. and Apartmentguide platforms has mathematically redistributed share among the remaining players. The historical shares of Rent. and Apartmentguide have now effectively been reduced to zero, marking the definitive end of their era as major industry forces.



# Beyond the Star Rating

At first glance, the positive sentiment trends from 2024 appear to be holding steady. However, this stability is misleading. The reality is that the sentiment recovery has halted, giving way to stagnation in the first half of 2025. This is a significant development because the first half of the year is typically stronger for resident feedback. A flat performance now suggests a loss of upward momentum precisely when it is needed most, just ahead of the historically more challenging second half of the year, when sentiment tends to erode.



The stagnation in sentiment is being driven by a hyper-polarization of feedback around the human element. Data reveals that Customer Service and Communication now generate both positive and negative feedback at unprecedented rates, effectively deciding a property's rating. For example, the Customer Service category's presence in reviews has exploded from 61% in 2023 to 77.6% in 2025. In that time, compliments involving customer service soared from 55% to over 63%, while complaints also edged up to nearly 16%. A similar pattern holds for Communication, which now appears in 21.3% of reviews (up from 16.4%), with its share of compliments growing to 11.5%. This proves that while overall performance may be stable, individual human interactions are having a more powerful and decisive impact on resident satisfaction than ever before.

### Customer Service

Year	All Reviews	Complaint %	Compliment %
2023	60.63%	14.85%	54.86%
2024	70.72%	14.48%	57.81%
2025	77.59%	15.99%	63.11%

### Communication

Year	All Reviews	Complaint %	Compliment %
2023	16.35%	9.94%	9.01%
2024	19.44%	9.81%	9.99%
2025	21.31%	10.08%	11.52%

This finding presents a strategic challenge. The industry's focus on operational cost-cutting may inadvertently create a service gap at a time when residents' desire for human connection is increasing.



# Conclusion

The first half of 2025 marks a definitive paradigm shift in the online review landscape. While the structural changes from platform consolidation have created a new statistical baseline, the underlying velocity of renter engagement has paradoxically accelerated, proving the enduring relevance of resident feedback. The ecosystem has fundamentally been reshaped into a more concentrated and high-stakes arena. The shifts in platform dominance, with Google achieving an unprecedented 74% share of new reviews, signal the end of a long-term market realignment. More importantly, the plateau in overall sentiment, driven by a hyper-polarization of feedback around Customer Service, reveals a new critical truth: the human element of property management is now the primary driver of a property's online reputation.

## Recommendations:

- **Adopt a Google-First, Not Google-Only, Strategy:** Given Google's market-defining share of new reviews, it must be the primary focus of your reputation management efforts. Actively solicit reviews to this platform and ensure your response protocol is best-in-class. However, do not neglect key ILSs like Apartments.com and Zillow, which form a vital second tier of influence for prospects.
- **Elevate the Onsite Team as a Strategic Asset:** Resident satisfaction is tied directly to the quality of human interaction. The industry's focus on operational efficiency must be balanced with a strategic reinvestment in the onsite team. Empower staff with the training and autonomy to provide empathetic, responsive service, framing it not as a cost center, but as the single most critical investment in your brand.
- **Transition from Monitoring to Operational Intelligence:** In this new environment, simply tracking star ratings is insufficient. Implement processes to systematically analyze the content of reviews to identify recurring operational themes—both positive and negative. Use this direct resident feedback on service, communication, and property conditions to drive meaningful operational improvements and inform strategic decisions.

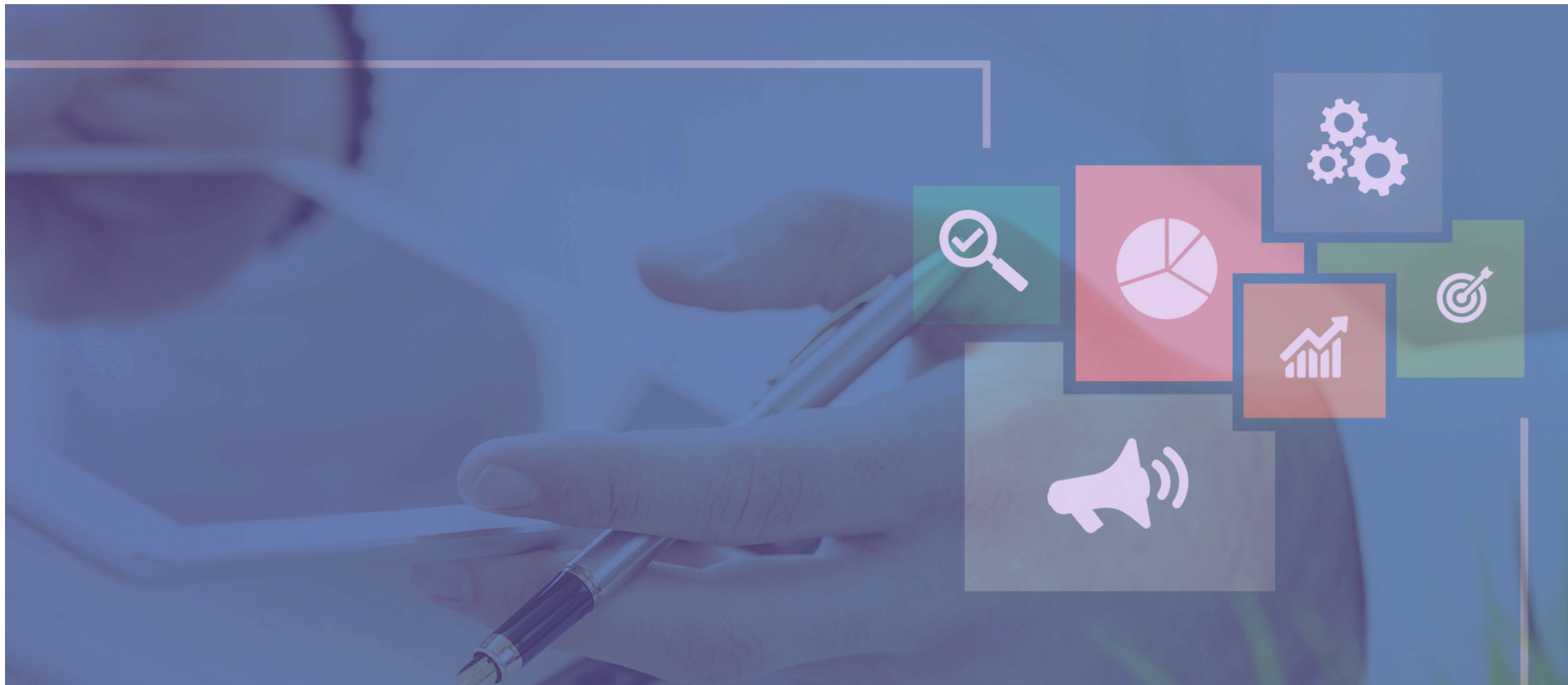
The online review landscape is not a static entity; it's a living, breathing ecosystem where the rules of engagement have fundamentally changed. By understanding these new dynamics, implementing a focused strategy, and cultivating a resident experience that prioritizes the human connection, operators and marketers can effectively harness the concentrated power of today's review platforms. The future of multifamily success will be defined not by a choice between technology-driven efficiency and human-centric service, but by the strategic integration of both.



# Editor's Note:

This report references a recent policy change by Apartments.com to no longer display reviews for properties that are not paying clients. From an industry perspective, we view this as a concerning development as it limits the public visibility of authentic resident feedback and moves a significant portion of the review landscape toward a "pay-to-play" model.

Our role, however, is to analyze the market impact. This policy was implemented after the data collection period for this mid-year analysis. While our initial tracking shows the change has already impacted approximately 26,000 properties, its full quantitative effect on market share and review volume will be comprehensively analyzed and detailed in our 2025 year-end report.





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