



The Mechanics of

# ONLINE REVIEW SITES AND INTERNET LISTING SERVICES

FIFTEENTH EDITION | 2026



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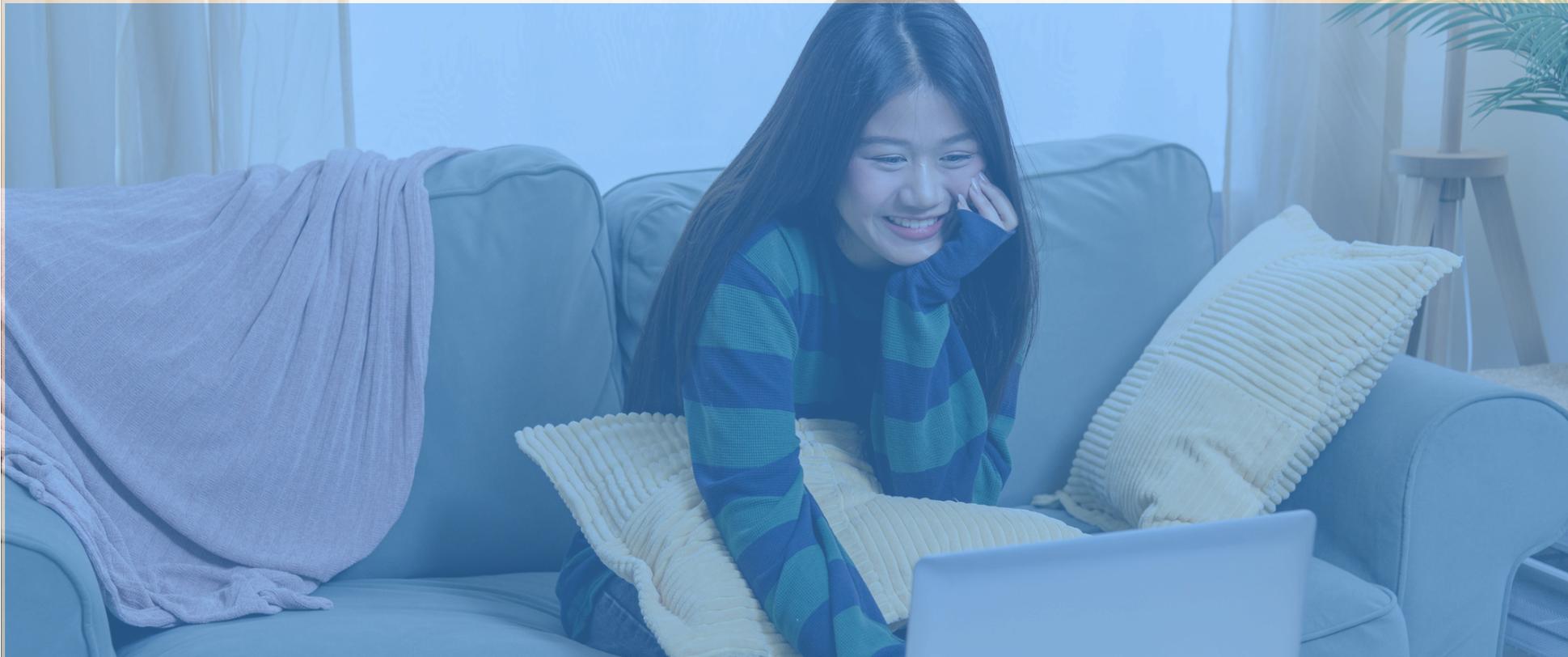
# Executive Summary

J Turner Research proudly presents the 15th edition of The Mechanics of Online Review Sites and ILSs, the multifamily industry's definitive guide to the online review landscape. Through our continuous, comprehensive analysis, we deliver the most rigorous and actionable data available on resident feedback.

This latest report is drawn from our robust portfolio of over 149,000 monitored multifamily properties nationwide. The data reaffirms the critical role of resident feedback in the modern rental journey, with 91% (136,225) of all monitored properties maintaining at least one online review.

Our longitudinal tracking highlights a stabilizing digital ecosystem following recent market recalibrations. While a historic, top-down purge of over 2 million historical reviews, driven by platform consolidation and algorithmic shifts, permanently reshaped the landscape, our total database has now grown to 18,346,238 reviews. This continued growth underscores a vital truth: renter engagement remains highly active. Recent shifts in review volume are a direct result of changing market structures, not a decline in the resident voice.

The unparalleled data and strategic insights within this report are essential for benchmarking performance and navigating today's complex review dynamics. For access to our complete research archive, including prior editions of Mechanics, visit [jturnerresearch.com/research](http://jturnerresearch.com/research).





# 15th Edition Highlights

- **The Fragility of Historical Data:** The industry experienced a massive, top-down structural shockwave, with over 2 million historical reviews permanently erased from the digital ecosystem. Driven by platform sunsets, algorithmic purges, and the shift toward "pay-to-play" models, this unprecedented deficit proves that a property's legacy reputation is incredibly fragile, making continuous new review generation a mandatory operational safeguard.
- **The Velocity Paradox:** Despite the severe contraction of available platforms and the massive wipeout of historical data, the velocity of new feedback shattered previous records. Renters generated a staggering 1.89 million new reviews in 2025—an increase of over 420,000 from 2024—proving that the resident voice is not declining; it is simply relocating.
- **Google's Monopoly in the AI Era:** The average property's footprint has shrunk to just 3.66 platforms, driven by Google capturing an unprecedented 82% of all new reviews. As secondary platforms transition to restrictive "pay-to-play" models, Google stands as the sole remaining anchor for organic feedback and the critical primary data source being scraped by the generative AI search engines that next-generation renters use to evaluate properties.
- **The Rise of "Daily Friction":** The data reveals a meaningful operational shift: foundational "Dealbreakers" like security and pests are largely under control, making safety a standard rather than a selling point. As a result, competitive differentiation has moved to the margins. Massive spikes in complaints regarding Pet Waste (+42%), Package Logistics (+28%), and Landscaping (+19%) dictate that mastering everyday logistical and aesthetic details is the new key to reputation distinction.

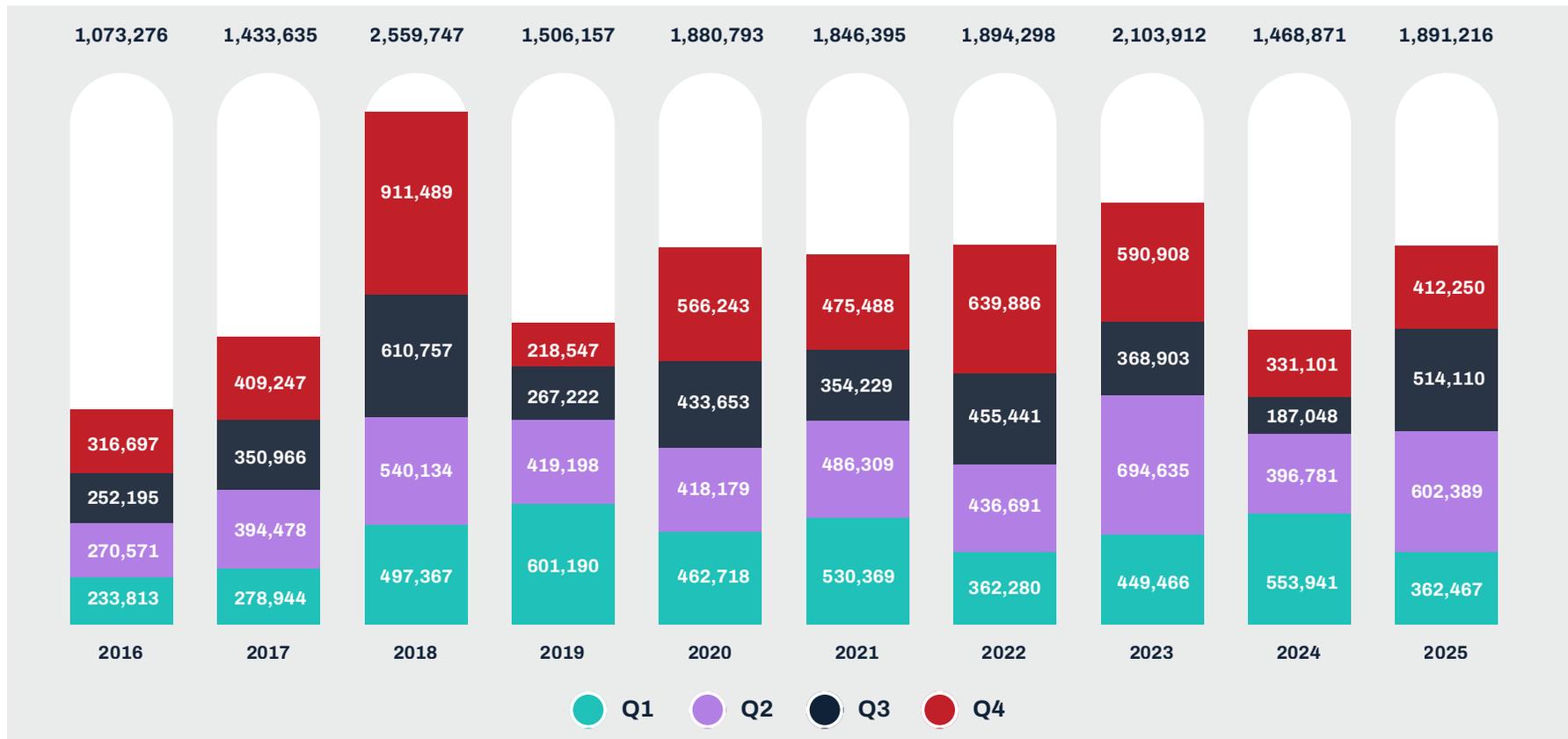


# Volume vs. Velocity

The industry's aggregate review database continues to be reshaped by sweeping market consolidation. Throughout 2025, the digital ecosystem absorbed unprecedented structural shifts—beginning with the sunsetting of platforms like Apartmentguide and Rent., and culminating in a dramatic Q4 drop as Apartments.com fully transitioned to a “pay-to-play” model (which we detail on the following page).

However, this volatility in aggregate volume masks a much more powerful trend: the velocity of new resident feedback is accelerating at a historic pace. Despite the reduction in available platforms and the massive purges of historical data, renters generated a staggering 1,891,216 new reviews in 2025. This blows past the 1,468,871 new reviews recorded in 2024, resulting in a remarkable year-over-year increase of more than 420,000 reviews.

This surge was exceptionally pronounced in the second half of the year. Returning in full force, Q3 and Q4 generated 514,110 and 412,250 new reviews, respectively. The data reveals an undeniable truth about the current landscape: the renter's voice is as strong as ever. Renter engagement is not in decline; it is simply becoming highly concentrated, drastically amplifying the strategic value of every new review on the remaining major sites.

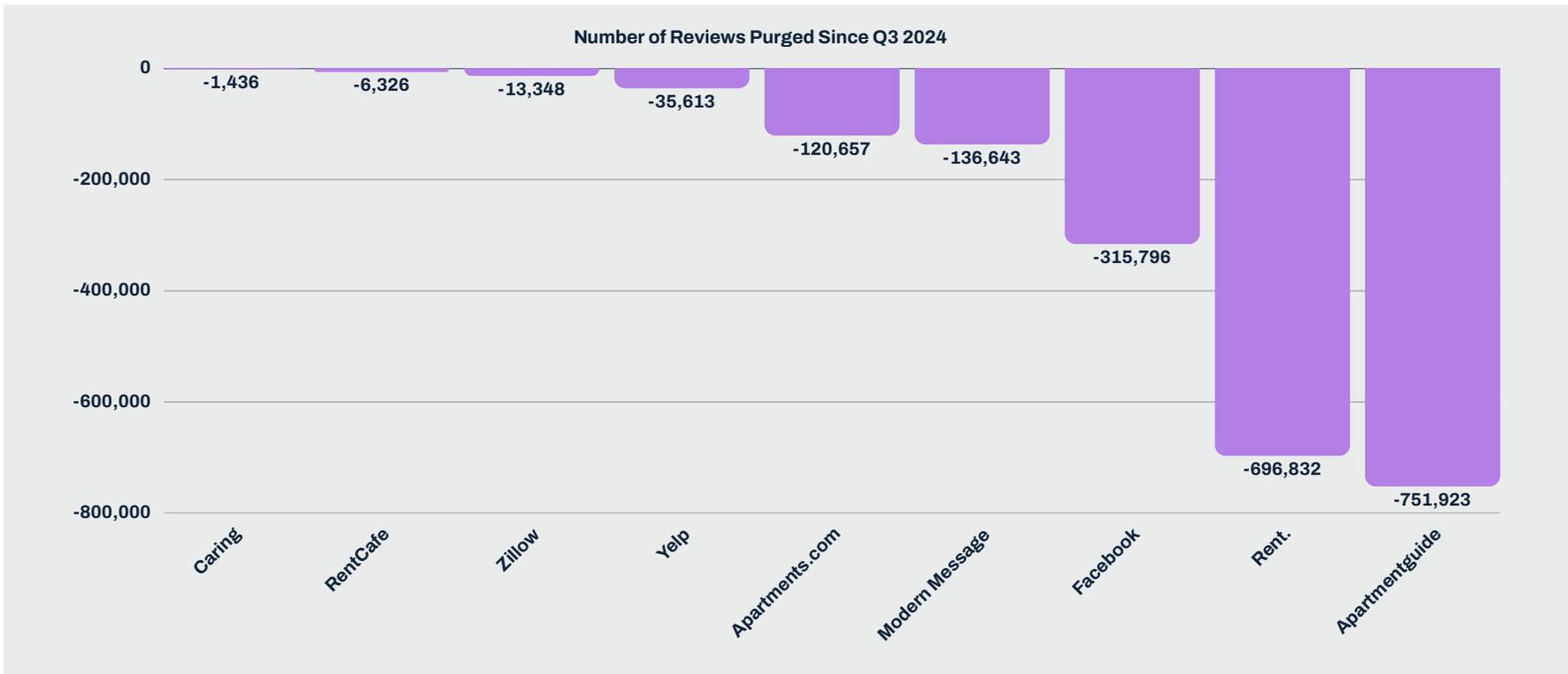


# The Great Review Purge

Since Q3 of 2024, the multifamily review landscape has experienced a structural shockwave. While operators traditionally view review volatility through the lens of individual moderation or resident deletions, the industry is currently undergoing a massive, top-down purge driven by corporate consolidation and shifting business models. Across the ecosystem, a staggering 2,078,574 historical reviews have been permanently deleted.

This unprecedented deficit was triggered by three distinct platform dynamics. The largest driver was platform consolidation, with the sunsetting of Apartmentguide.com (-751,923) and Rent.com (-696,832) erasing nearly 1.45 million reviews overnight. The second driver was algorithmic platform hygiene, highlighted by Facebook's massive removal of over 315,000 reviews and Yelp shedding over 35,000. Finally, the shift toward commercial monetization struck the secondary market, with Apartments.com's new "pay-to-play" model wiping out over 120,000 reviews from non-paying properties, alongside the continued decay of legacy Modern Message data (-136,643).

This massive loss exposes a critical vulnerability: historical reputation is fragile. With over 2 million reviews vanishing from the internet in a matter of months, operators can no longer coast on past performance. As of this writing, even Google has begun to purge historic reviews they deem illegitimate. A constant, aggressive influx of organic, new reviews is the only way to insulate a property against the extreme volatility of the modern digital landscape.

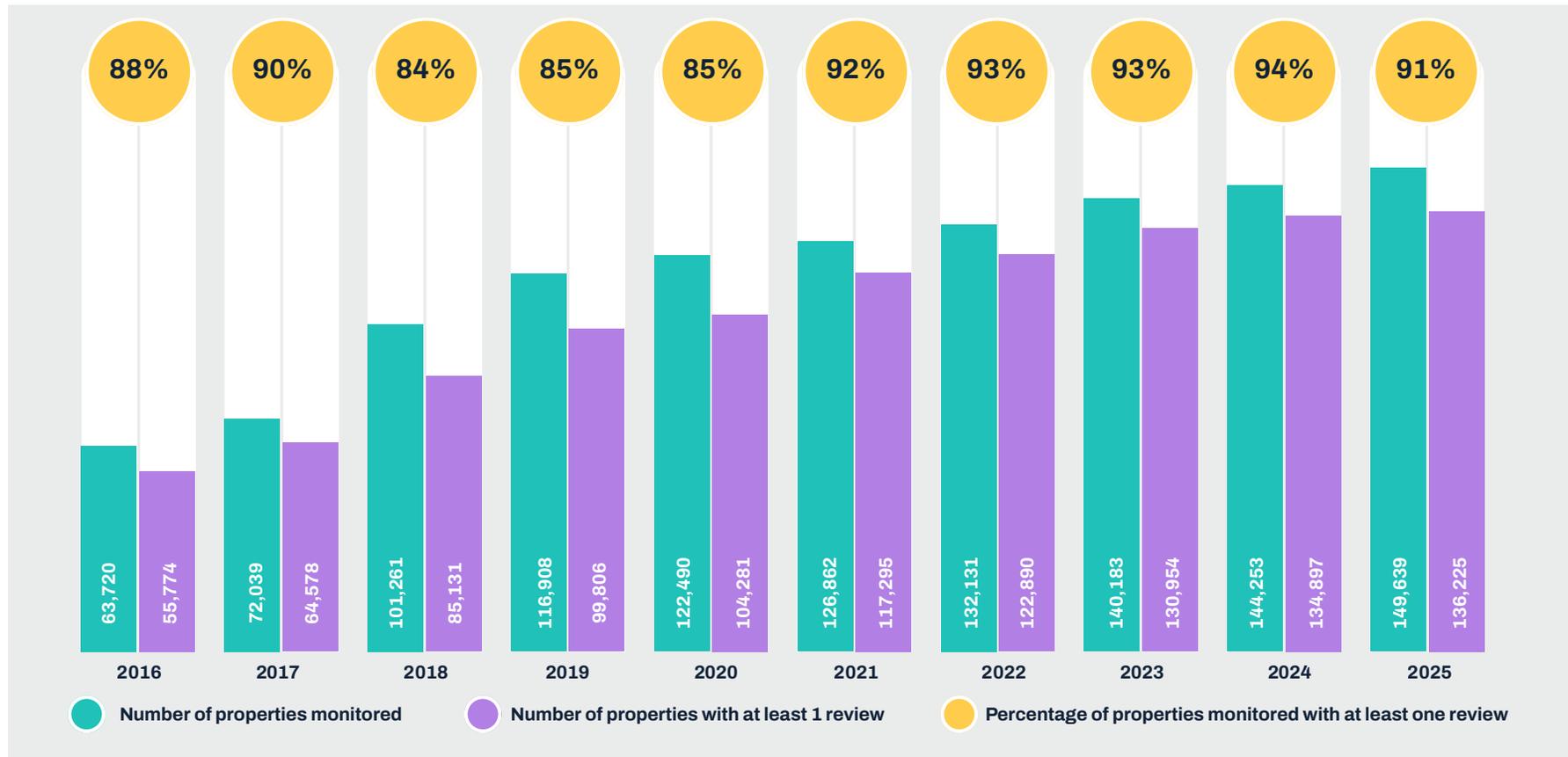


# Review Presence as a Market Standard

While the preceding analysis details significant market volatility, the pervasiveness of online reviews as a fundamental digital asset remains constant. Following a rigorous update to our database to remove closed communities and capture new developments, our nationwide portfolio now monitors 149,639 active multifamily properties. Of these, 91% (136,225) maintain at least one online review.

This slight shift from the 93% and 94% adoption rates of recent years is a natural byproduct of market mechanics rather than a decline in resident engagement. The dip is driven by three converging factors: recent platform consolidation, standard database hygiene, and a massive influx of new supply. The record-high multifamily construction starts of 2023 are now delivering finished product to the market. As these brand-new properties enter our tracking pipeline during lease-up, they naturally begin with a blank slate, temporarily diluting the overall percentage of properties with established reviews.

Ultimately, this near-universal adoption cements the truth: a robust review presence is not just a competitive advantage, but the baseline for market viability. When considered alongside the accelerating velocity of new reviews, an established digital footprint remains a non-negotiable asset. It is the primary touchpoint for prospective renters, making its absence a critical vulnerability in today's market.



# A Hyper-Concentrated **Baseline**

Despite the permanent loss of several review platforms over the past year, the renter's voice remains as loud as ever. While the average property's digital footprint has shrunk to just 3.66 platforms, driven largely by consolidation and the rise of "pay-to-play" models, the average number of reviews per property holds strong at 142.17.

This means renter feedback hasn't dropped off; it has simply become hyper-concentrated. With the exact same volume of reviews now squeezed onto fewer sites, the strategic weight of the surviving platforms has skyrocketed.

This concentration is critical as the industry faces the rise of AI-assisted search. Generative AI engines summarize property reputations by scraping data directly from this exact pool of sites. Today, reputation management goes beyond star ratings; it requires building a strong enough presence on these 3.66 platforms to dictate the exact narrative an AI model serves to your prospects.



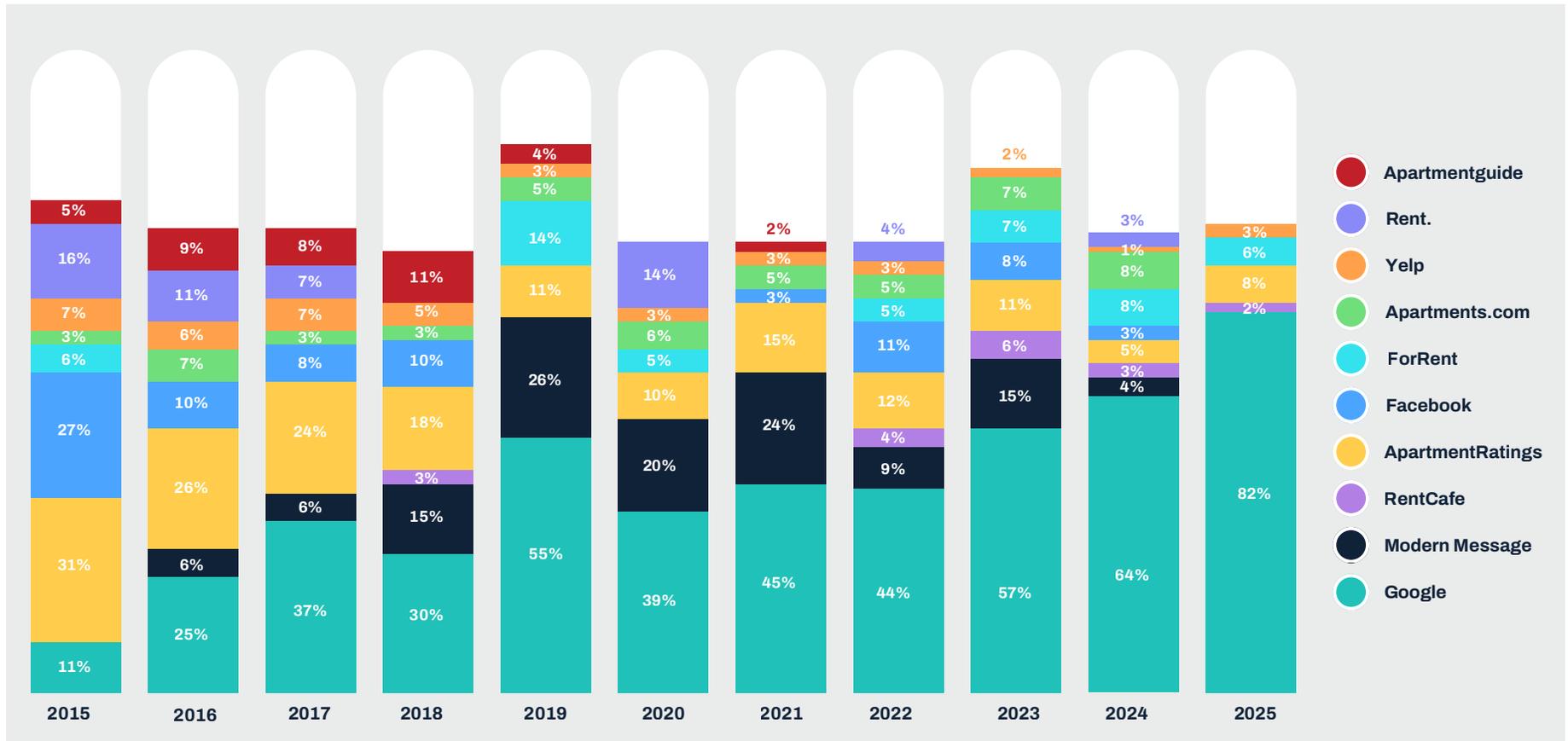
# The Concentration of Influence

The consolidation of the review market has severely intensified the concentration of renter feedback. In 2025, Google extended its commanding lead to capture an unprecedented 82% of all new reviews, establishing a near-monopoly on the resident voice.

Behind Google, the secondary market saw a major shakeup. With Apartments.com's new review generation hindered by its "pay-to-play" transition, ApartmentRatings took the lead among industry-specific sites, capturing a 8% share. ForRent follows at 6% (primarily via aggregation), with RentCafe (2%), and Yelp (3%) making up the remainder of the active ecosystem.

Because the secondary tier is increasingly driven by commercial relationships and aggregation, the strategic takeaway is definitive. Google is the last true heavyweight for organic resident feedback, and dominating that single platform is the most critical determinant of a property's online success.

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\*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.

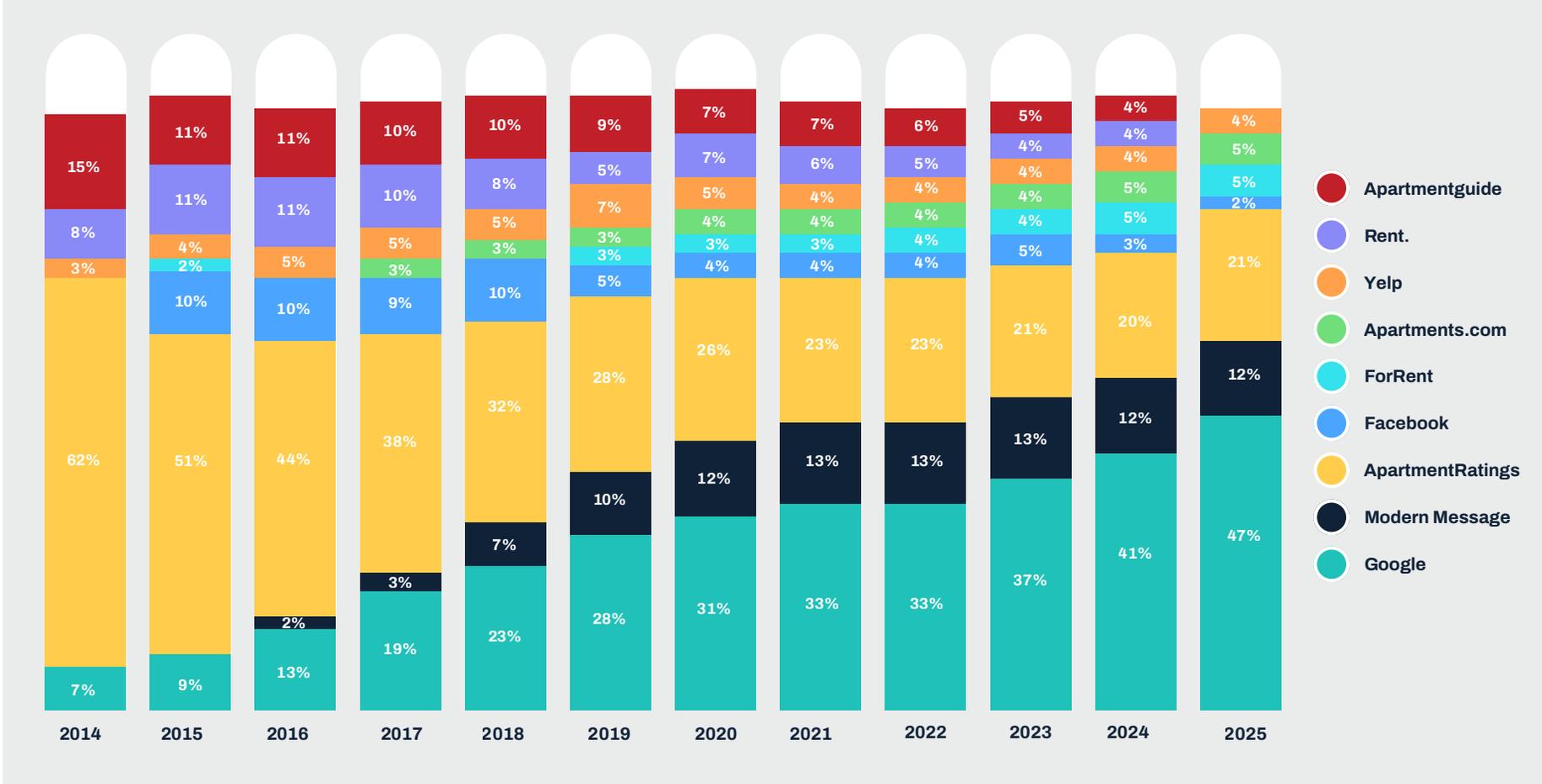
# Reshaping of Market Share

Looking at the total historical database of online reviews, the decade-long battle for market share has a clear victor. By the end of 2025, Google's total historical share reached 47%, positioning it to soon hold more than half of all reviews ever generated in the multifamily space.

The rest of the market has become highly concentrated. Driven by the mathematical redistribution of shares following the purge of defunct platforms like Rent. and Apartmentguide—ApartmentRatings (21%) and legacy data from Modern Message (12%) round out the top tier. Meanwhile, platforms like Apartments.com (5%) and ForRent (5%) operate in the single digits.

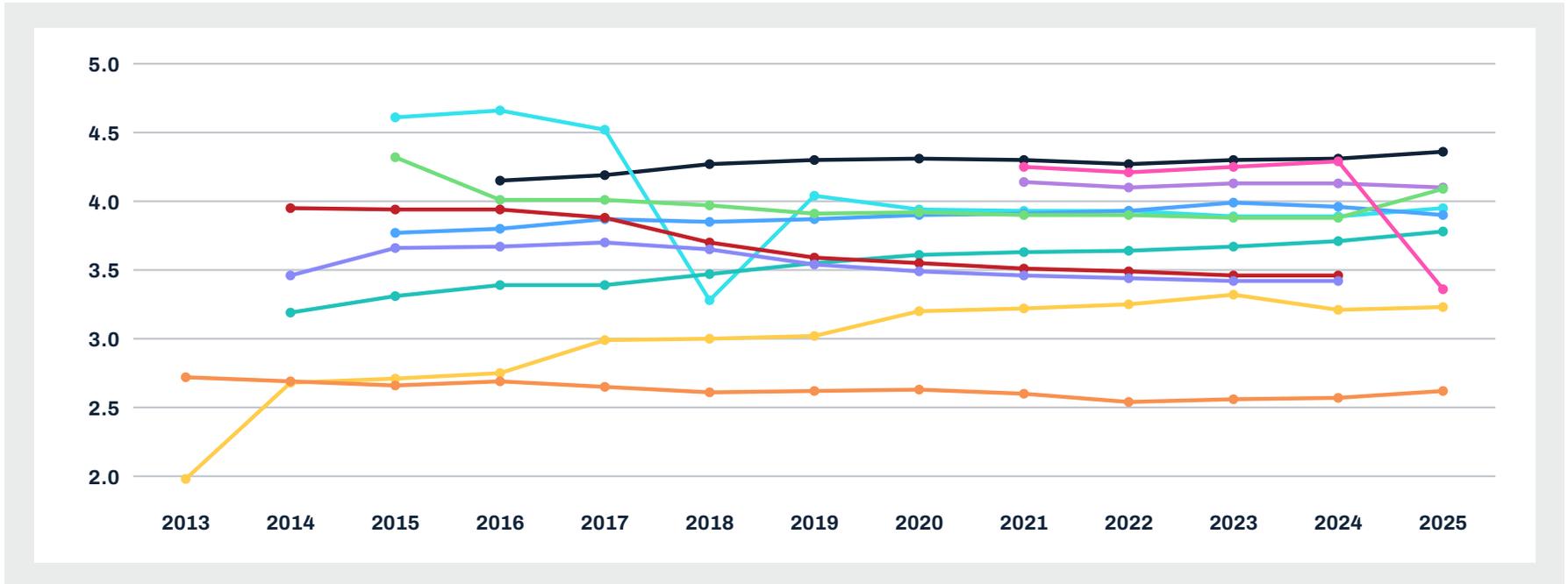
With dozens of legacy review sites and ILSs officially reduced to a 0% share, the era of managing a highly fragmented digital footprint is over. The data confirms that Google is the absolute king of the review landscape.

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# Beyond the Star Rating

In 2025, analyzing resident sentiment requires looking past the surface to understand how recent market shakeups have skewed the data. Several dramatic shifts like Apartments.com's jump to a 4.09 average following its "pay-to-play" purge, or Zillow's historic plunge to 3.36 are the direct result of platform policy changes rather than organic resident happiness. Through this turbulence, Google stands out as the anchor of the industry. Registering a steady, un-manipulated increase to a 3.78 average, it remains the most accurate and barrier-free reflection of the renter's voice, representing the only true baseline of multifamily sentiment.



	2013	2014	2015	2016	2017	2018	2019	2020	2021	2022	2023	2024	2025
Modern Message				4.15	4.19	4.27	4.30	4.31	4.30	4.27	4.30	4.31	4.36
RentCafe									4.14	4.10	4.13	4.13	4.10
ForRent			4.61	4.66	4.52	3.28	4.04	3.94	3.93	3.93	3.89	3.89	3.95
Facebook			3.77	3.80	3.87	3.85	3.87	3.90	3.91	3.93	3.99	3.96	3.90
Apartments.com			4.32	4.01	4.01	3.97	3.91	3.92	3.90	3.90	3.88	3.88	4.09
Google		3.19	3.31	3.39	3.39	3.47	3.55	3.61	3.63	3.64	3.67	3.71	3.78
Apartmentguide		3.95	3.94	3.94	3.88	3.70	3.59	3.55	3.51	3.49	3.46	3.46	
Rent.		3.46	3.66	3.67	3.70	3.65	3.54	3.49	3.46	3.44	3.42	3.42	
ApartmentRatings	1.98	2.68	2.71	2.75	2.99	3.00	3.02	3.20	3.22	3.25	3.32	3.21	3.23
Yelp	2.72	2.69	2.66	2.69	2.65	2.61	2.62	2.63	2.80	2.54	2.56	2.57	2.62
Zillow									4.25	4.21	4.25	4.29	3.36

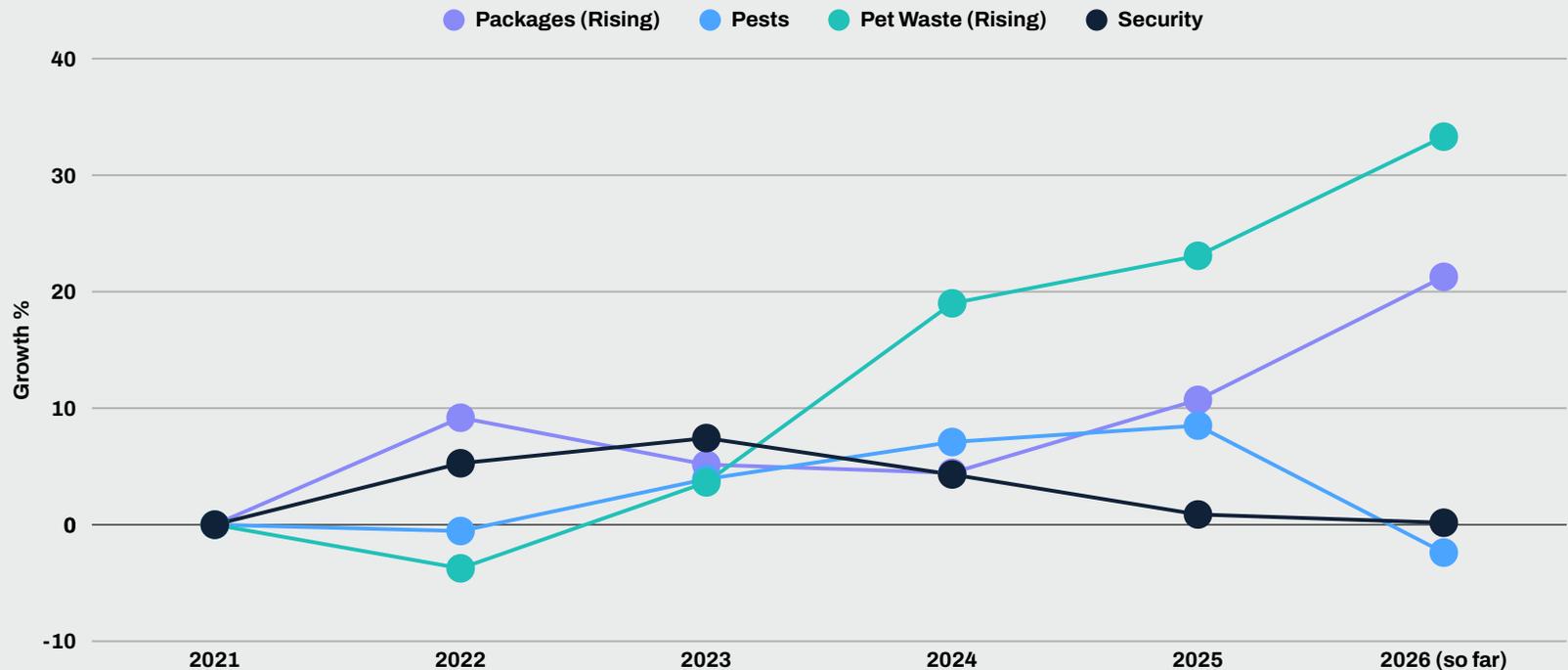


# The New Battleground: Execution

Our longitudinal analysis points to a meaningful operational shift: the industry has largely brought its most critical vulnerabilities under control. Since 2021, negative sentiment tied to "Dealbreaker" categories (Security and Pests) has steadily contracted, reflecting genuine progress in standardizing risk management and habitability protocols. But that progress has come with an unintended consequence: as foundational concerns recede, a new wave of "Daily Friction" complaints has moved in to take their place.

The data tells a compelling story. Pet Waste (+42%) and Package Logistics (+28%) have become the fastest-growing friction points in the ecosystem, while a rising intolerance for curb appeal issues drove a 19% surge in Landscaping complaints. Residents aren't discussing Safety less because the importance has fallen, it is now just the standard across the industry. This means failures here stick out like a sore thumb.

That shift redefines what competitive differentiation looks like heading into 2026. Safety and maintenance excellence is no longer a selling point; it's the price of admission. The real opportunity now lives in the margins, in the logistical and aesthetic details that residents notice precisely because everything else is running smoothly. Properties that get the "little things" right will be the ones that stand apart.



# Conclusion

The close of 2025 marks a definitive end to the era of the fragmented digital footprint. While unprecedented platform volatility and the rapid shift toward "pay-to-play" models permanently erased over 2 million historical reviews from the ecosystem, the renter's voice has never been louder. This paradox, a shrinking number of available platforms capturing a record-breaking 1.89 million new reviews, has created a hyper-concentrated and high-stakes arena. With Google establishing a near-monopoly on organic feedback and secondary channels increasingly warped by commercial monetization, a property's online reputation is no longer just a passive reflection of resident satisfaction. It is a fragile, highly concentrated digital asset dictated by shifting platform mechanics.

## Recommendations:

- **Double Down on Google as Your Organic Anchor:** With Google capturing 82% of all new feedback, it is the sole remaining heavyweight for barrier-free, organic resident sentiment. Dominating this platform is no longer just a best practice; it is the absolute focal point of modern reputation management. Your onsite teams must prioritize driving new, authentic reviews directly to your Google Business Profile above most channels.
- **Optimize for the AI-Assisted Renter:** The average property's digital footprint has shrunk to just 3.66 platforms. This hyper-concentration means every single review carries exponentially more strategic weight. As prospective renters increasingly bypass traditional search results in favor of generative AI summaries, those AI models are scraping sentiment directly from this shrinking pool of sites. You must build and actively manage a strong presence on your surviving platforms to dictate the exact narrative AI delivers to your next resident.
- **Treat Review Generation as Daily Risk Mitigation:** The staggering deletion of over 2 million historical reviews proves that past reputation is rented space or vulnerable to sudden corporate consolidation, algorithmic purges, and new paywalls. Operators can no longer coast on historical data or assume their legacy reviews are safe. A constant focus on generating new reviews is the only way to insulate your brand's digital foundation against the extreme volatility of the modern internet.
- **Leverage "Daily Friction" for Digital Differentiation:** With foundational issues like safety now expected as standard, your online reputation will increasingly be defined by the "little things." Positive reviews highlighting your team's excellence in package logistics, pet management, and curb appeal are the exact margins where prospective renters can uncover your leg up against competitors, assuming you are already performing well in "Dealbreaker" areas.

The online review landscape is no longer a static repository for renter opinions; it is a highly concentrated, commercially driven ecosystem where the rules of engagement have fundamentally changed. By recognizing the fragility of historical data, understanding the new power of AI-driven search, and treating Google as the ultimate arbiter of truth, and mastering the daily friction points that now dominate resident feedback, operators and marketers can effectively harness this momentum. The future of multifamily marketing will be defined by those who abandon the scattered strategies of the past, sweat the operational details, and actively command their reputation in this newly concentrated arena.





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