



---

## Resident Lifestyle Preferences: An Insight

---

**MFE** CONCEPT  
COMMUNITY

Exclusive research conducted for  
Multifamily Executive's 2014 Concept Community

## ABOUT J TURNER RESEARCH

---

Founded in 2001, J Turner Research is the leading provider of innovative, affordable, and business enhancing market research services for the multifamily industry. J Turner uses state-of-the-art technology to empower clients with real time, actionable operational intelligence. With its unique survey methodology, industry benchmarking process, and trending reports, the company strives to consistently meet the changing demands of the multifamily industry. Headquartered in Houston, the company offers a range of cutting edge services including monthly resident satisfaction surveys, real-time prospect feedback surveys, and an online reputation assessment tool among others. For more information, please call (281) 558-4840 or visit <http://www.jturnerresearch.com>

## TABLE OF CONTENTS

1	About J Turner Research
4	Executive Summary
8	Sample Size
9	Participating Companies
10	Demographic Profile
10	Gender
11	Education Level
11	Work Environment
12	Marital Status
12	Children Living in the Apartment
13	Household Income
14	Apartment Location: Urban vs. Suburban
15	Average Commute Time
15	Number of Cars
16	Pet Ownership
17	Looking Forward to Homeownership
17	Do you see yourself as buying a house in the next five years?
17	Urban vs. Suburban: Apartment location and buying a house in the next five years.
18	Renters by Choice
18	I prefer to live in an apartment than a house.
19	Profile of Renters by Choice: Average age
19	Profile of Renters by Choice: Use of mass transit, Number of cars, and Frequency of cooking
20	Profile of Renters by Choice: Health and Activity preference - running and playing tennis.
21	Eco Consciousness
22	On a scale of 0 to 10, how important are the following green features to you: energy-efficient appliances, walkability, recycling, use of sustainable energy sources, and low-flow toilets.
25	I see myself as buying an electric car in the next five years.
25	On a scale of 0 to 10, with 10 being the most likely, how likely are you to use a Co-op Garden in the community?
26	How many times a week do you recycle?
27	Health and Fitness
27	Percentage of residents doing the following activities at least 3 times a week: workout, run, swim, yoga, play basketball, play tennis, and play volleyball.

29 Social Behavior

- 30 Where do you spend most of your evenings during weekdays?
- 30 Where do you spend most of your evenings during weekends?
- 31 How many times a month do you entertain guests at home?
- 31 How many times a month do you enjoy wine?
- 32 How many times a month do you go to night clubs?
- 32 How many times a month do you play poker?

33 Personal Characteristics

- 34 How many times a week do you cook?
- 34 How many times a month do you grill out?
- 35 How many times a month do you engage in sports activities (hiking, biking, boating, and adventure sports etc.)?
- 35 How many times a month do you attend religious services?
- 36 Rate the following from Strongly Agree (10) to Strongly Disagree (0): I am a sports fan, I enjoy multicultural activities, I am interested in politics, and I am interested in current events.
- 37 E-Shopping: How often do you shop online?
- 38 Extra storage space, save that for later!: Do you rent a storage unit to store extra belongings?

39 Reading Preferences

- 39 How many times a month do you visit the library?
- 39 Do you subscribe to a newspaper (s)?
- 39 Do you subscribe to a magazine (s)?

40 Neighboring Store Preferences

- 40 What type of stores would you like to see around your community?

41 Shhh...quiet, please!

- 41 On a scale of 0 to 10, how important is quietness within your community?

42 Resident Speak

- 42 Keyword frequency from open-ended suggestions shared by residents.

43 Contact Us

## EXECUTIVE SUMMARY

### *Meet Jane Edward: A Quintessential Apartment Resident*

Meet Jane Edward, a quintessential apartment resident – She is 36 years old and single, works at an office, has no pets, owns a car, and lives in the suburbs. She is also eager to buy a house in the next five years.

But in the meantime, she is not completely enthralled by her current apartment community, so she is looking to upgrade. Jane's wish list for her dream community would have a small grocery store or café in the complex; shopping complexes within walking distance; a bigger, well-equipped gym; a walking/jogging path on the property; better sound proofing; separate sections for residents with children and adequate parking. These are just some of the suggestions Jane has shared for management companies and developers to design communities better suited to her needs.

### **Scope of the Survey**

Jane is among the **27,642** apartment residents who have shared their lifestyle preferences in an exclusive survey by **J Turner Research** in partnership with **Multifamily Executive**. This first-of-its kind industry report titled **Resident Lifestyle Preferences: An Insight** highlights the lifestyle desires of residents nationwide. The study was conducted for **MFE's 2014 Concept Community, Renovation Nation series**. The detailed results were released on September 23, 2014 during an exclusive research presentation at the 2014 Multifamily Executive Conference in Las Vegas, NV.

The findings of this study encompass a diverse range of lifestyle aspects critical to rehabbers, including **renter's attitudes, feelings, and behavior** regarding homeownership, social life, personal characteristics, the environment, health and fitness, neighboring stores, quietness of a property, and more.

### **Demographic Profile**

The majority of our survey respondents were Millennials (53 percent, 33 and younger), followed next by Gen Xers (27 percent, 34-49). In terms of employment, 62 percent of residents work at an office, and only 4 percent work primarily from home. The average commute time of residents is 23.81 minutes.

More than half (52 percent) of residents live in the suburbs; 46 percent, in urban areas. Thirty-three percent of residents earn more than \$ 75,000, out of which 53 percent are urban residents. With respect to car ownership, 58 percent of the residents own one car in the household, compared with 6 percent with none, and 37 percent with two or more cars.

With respect to **marital status**, 46 percent stated being single as opposed to 29 percent who indicated being married. Three quarters of residents indicated that they had no children living with them in the apartment.

**Pet Lovers**, Well Not So Much—The vast majority of the residents, 67 percent do not have pets, only 33 percent do. Some residents who do not have pets voiced the need for *“animal free apartments and a stringent pet policy”*. In contrast, a pet enthusiast expressed, *“a dog run would be exceptionally nice for dog owners, such as myself.”*

### Looking Forward to Homeownership

Home buying seems to be top-of-mind among the respondents, with 51 percent seeing themselves as buying a house in the next five years, while 29 percent do not. Not surprisingly, it is the younger age group (61 percent Millennials and 29 percent Gen X) driving the home buying trend.

### Renters by Choice

A particularly striking discovery is that 25 percent of the residents are what we call **Renters by Choice** meaning that they prefer to live in an apartment than a house. Of this 25 percent, the younger cohort is the front-runner with 41 percent Millennials (33 and younger), 27 percent Gen X (34-49), and 25 percent Baby Boomers (50-68).

### Eco-consciousness and Impact on Rent

In the present times, more and more people are **embracing green living**, including apartment dwellers. When asked about their preference for green features on a scale of 0-10, **energy-efficient appliances** (8.33) emerged as the top choice of residents. A close second was walkability (8.10); followed by recycling (7.76); sustainable sources of energy wind/solar (7.13); and low-flow toilets (6.91) ranked last. As one resident on the survey said, *“Do not get low flow toilets, it just means I flush eight times instead of one.”* Additionally, seventeen percent of renters are looking to buy an **electric car** in the next five years.

Eco-friendly homes come at an additional price: Are residents willing to foot the additional bill? Our findings reaffirm what previous research has shown—residents appreciate the idea of “green” as long it saves them money, but the majority of them are not keen to pay more for green features.

## Health and Fitness

---

This survey highlights that residents prefer varied means to stay fit. When it comes to their favorite activity, **working out** (44 percent) at least three times a week wins hands down, followed by running at 30 percent. Swimming (11 percent) and Yoga (10 percent) were among the less preferred means. Most residents unanimously expressed the need for a large gym, open 24 hours, with a variety of modern exercise machines and equipment, as well as fitness classes.

## Social Behavior

---

To gauge the social characteristics of the residents we asked a host of questions. A good majority of the residents (84 percent) spend their **weekday evenings** inside their apartment. The response tilts in the favor of being outdoors on weekend evenings with 58 percent answering in the affirmative. Age is an influential factor in determining this behavior with 63 percent Millennials, 58 percent Gen X, 47 percent Baby Boomers, and 29 percent Silent Generation spending their **weekend evenings** outdoors.

Enjoying wine received a mixed response, 43 percent of respondents never or rarely enjoy wine while 40 percent shared that they enjoy wine at least three times a month. The response to entertaining was also almost an even split with 38 percent saying that they entertained at least three times a month, while 34 percent never or rarely entertain. Nightclubs and playing poker were an unequivocal no. Almost three quarters of the residents never or rarely visit nightclubs. Only 12 percent indicated visiting a nightclub at least three times a month. Ninety-two percent of the residents rarely or never play poker.

## Personal Characteristics

---

No two individuals are similar; both have distinct attitudes and behaviors. To understand individual characteristics and preferences, we probed for **specific lifestyle patterns**. With regards to cooking, 42 percent of the residents cook daily and 25 percent grill out at least three times a month, while 56 percent of the residents never or rarely grill out. It is no wonder that some cooking enthusiasts demanded, *“Bigger kitchens with more cabinets and storage space.”* Attending a religious service is not a top priority for residents, the majority of them (60 percent) rarely or never attend a religious service, only 27 percent attend a religious service at least three times a month. Almost half, 48 percent of the residents reported shopping online sometimes, 28 percent most of the time, 8 percent always, and 17 percent rarely or never shop online. For the most part (81 percent), residents don't rent storage units, yet the older the renter, the more interested they are in storage.

### Neighboring Store Preferences

---

Convenience driven by proximity of an apartment community to shopping centers and restaurants is known to influence resident decision-making. When it comes to the kinds of stores they most prefer nearby their apartment community, grocery store (73 percent) was the favorite. *“A grocery store within walking or biking distance is a huge pro,”* said a resident. The next most preferred nearby retail establishments were specialty restaurants and cafes (68 percent) and apparel and shoe stores (41 percent). Somewhat important were fast food places at 22 percent and arts and craft stores at 20 percent. Dry cleaning (15 percent) and sporting goods store (13 percent) ranked low on the list.

### Shhh...quiet, please!

---

With a rating of 8.73, on a scale of 0-10, quietness emerged as a highly preferred aspect of apartment living. As aptly described by a resident, *“Peace and quiet is essential for comfort living”*. Many residents expressed that the solution for a quiet environment could be found in sufficient and better insulation between floors and walls of each unit.



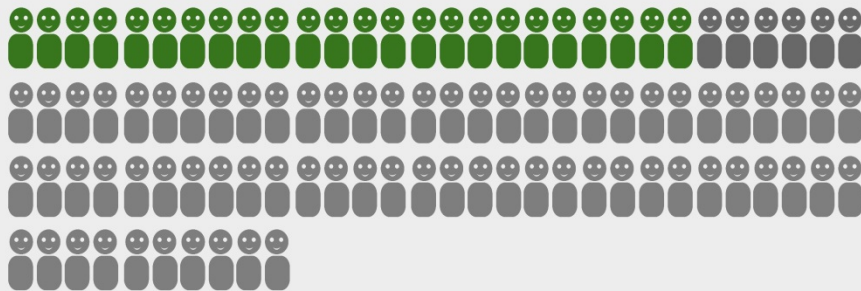
# SAMPLE SIZE

The study, *Resident Lifestyle Preferences: An Insight*, is the result of an exhaustive survey administered nationally.



24%

Response Rate

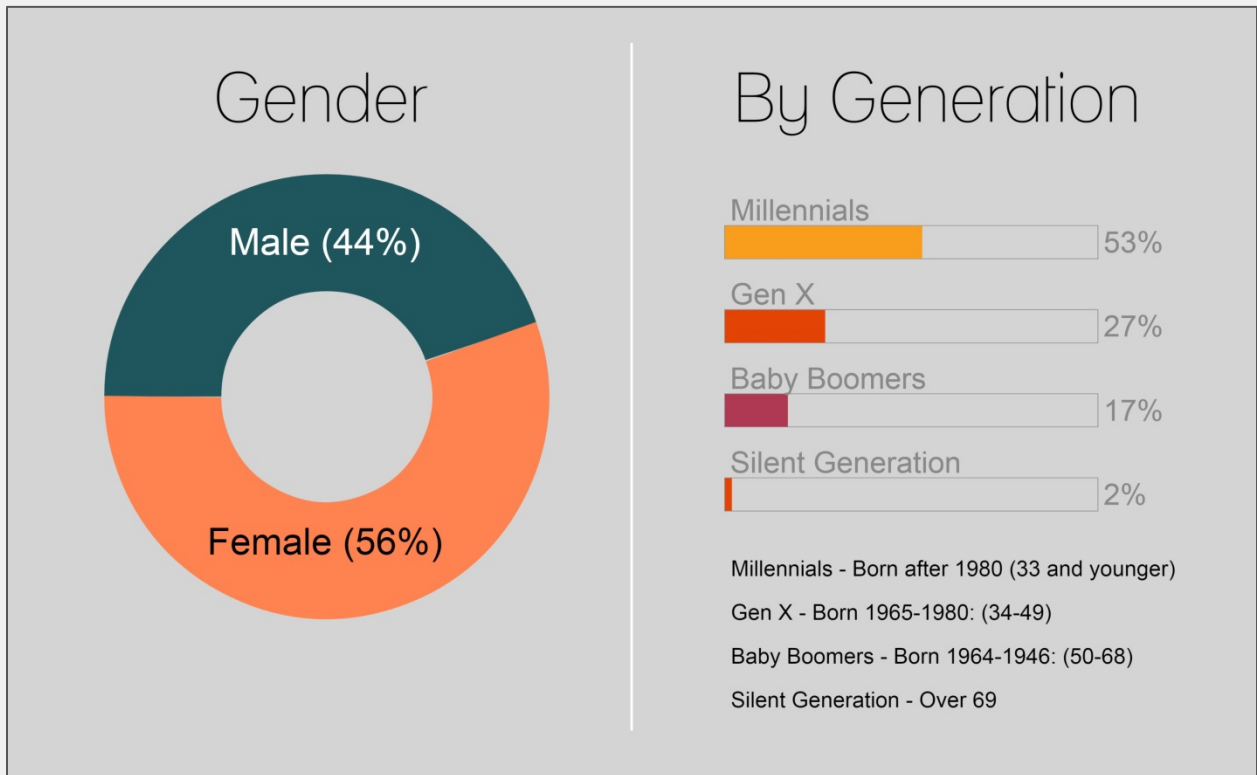


**PARTICIPATING COMPANIES**



## DEMOGRAPHIC PROFILE

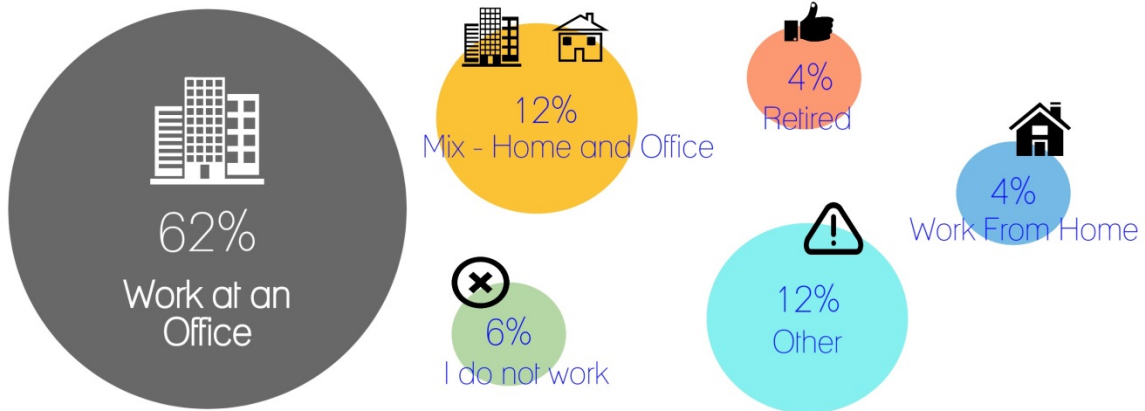
This study captures multiple demographic features of the respondents. A comprehensive review of each characteristic is imperative to understand the resident's lifestyle attitudes, behavior, and choices.



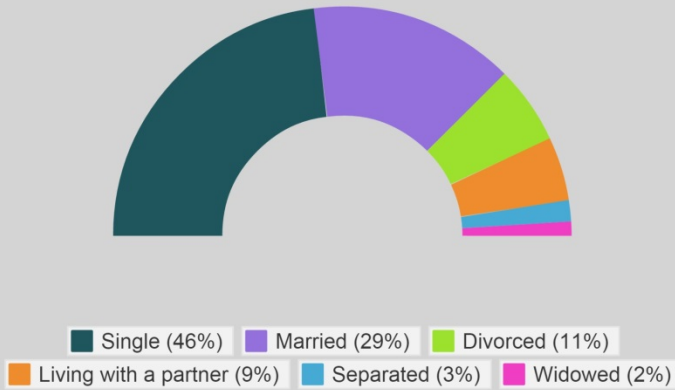
## Education Level



## Work Environment

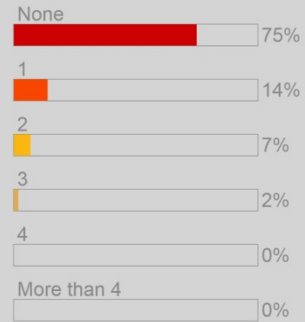


### Marital Status

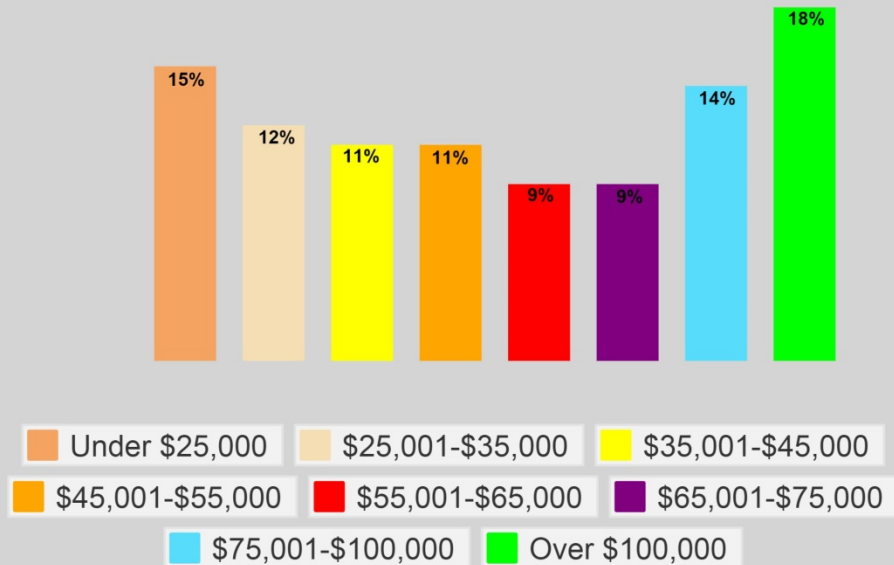


### Children

How many children live with you in your apartment?



### Household Income Distribution

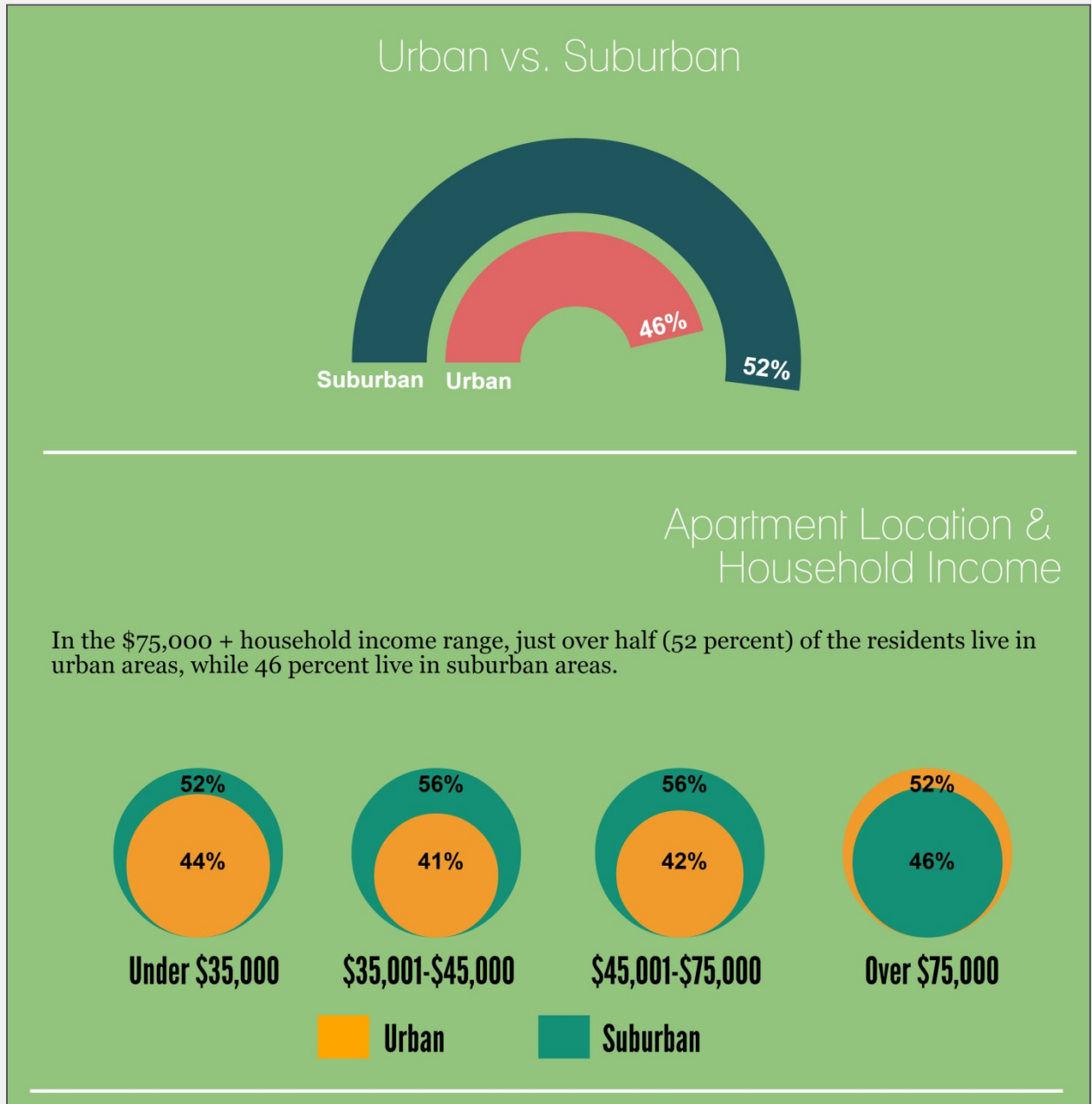


## HOUSEHOLD INCOME BY GENERATIONS

In the high-income range (over \$100,000), Gen X at 24 percent leads the pack, followed by Baby Boomers at 21 percent.

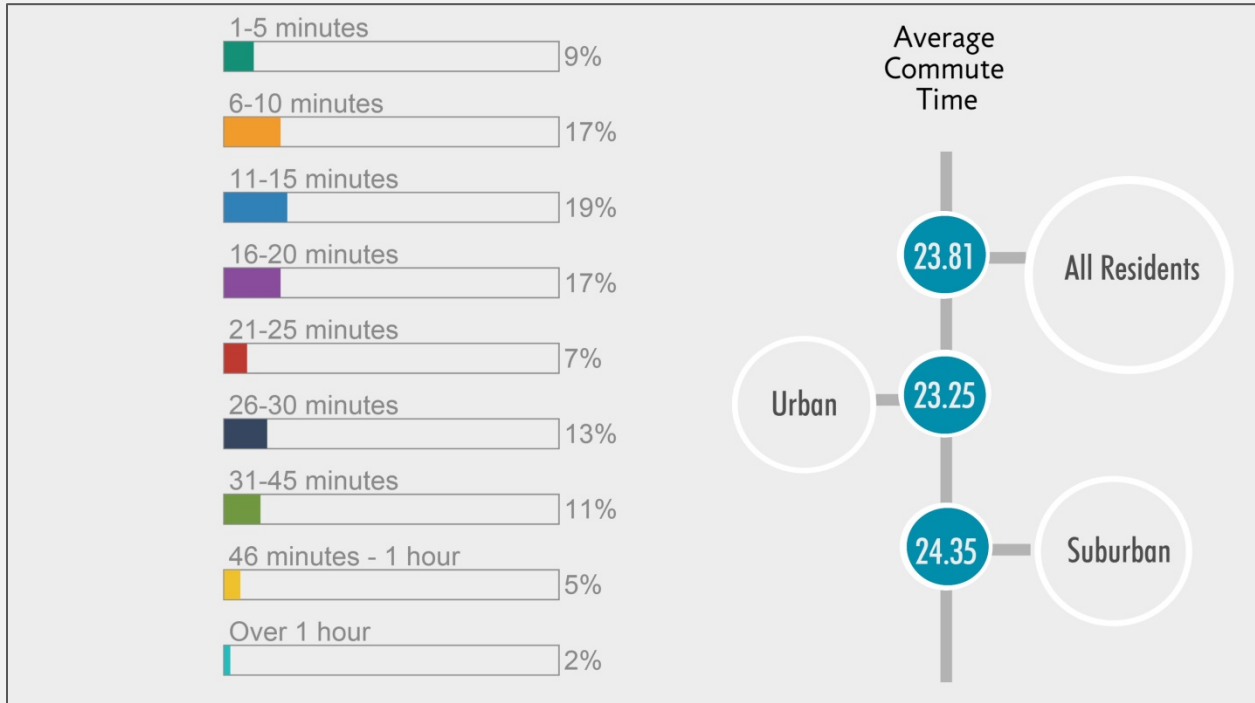


## APARTMENT LOCATION

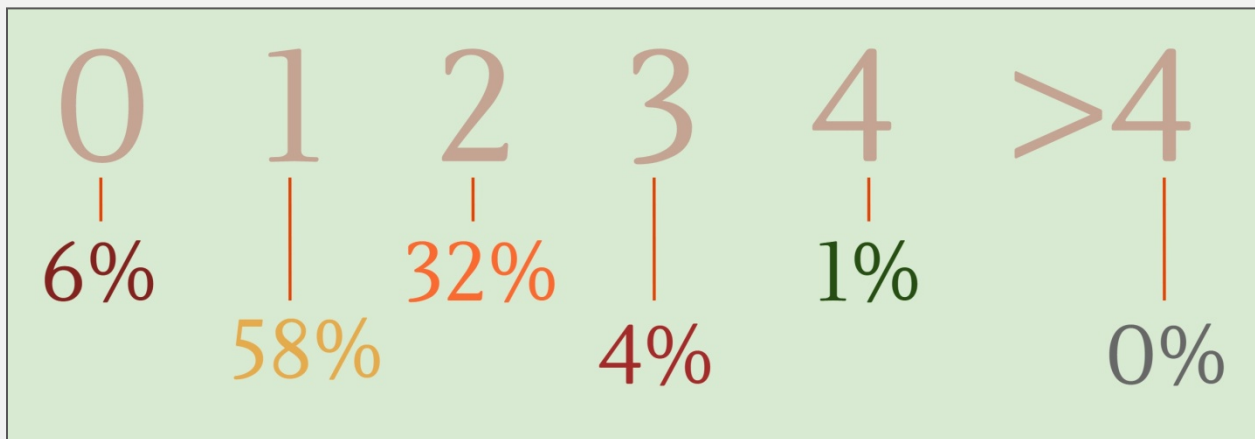


## AVERAGE COMMUTE TIME (IN MINUTES)

The average commute for residents is 23.81 minutes. In an urban setting it is 23.25 minutes, and as expected the commute time in a suburban setting increases marginally to 24.35 minutes.



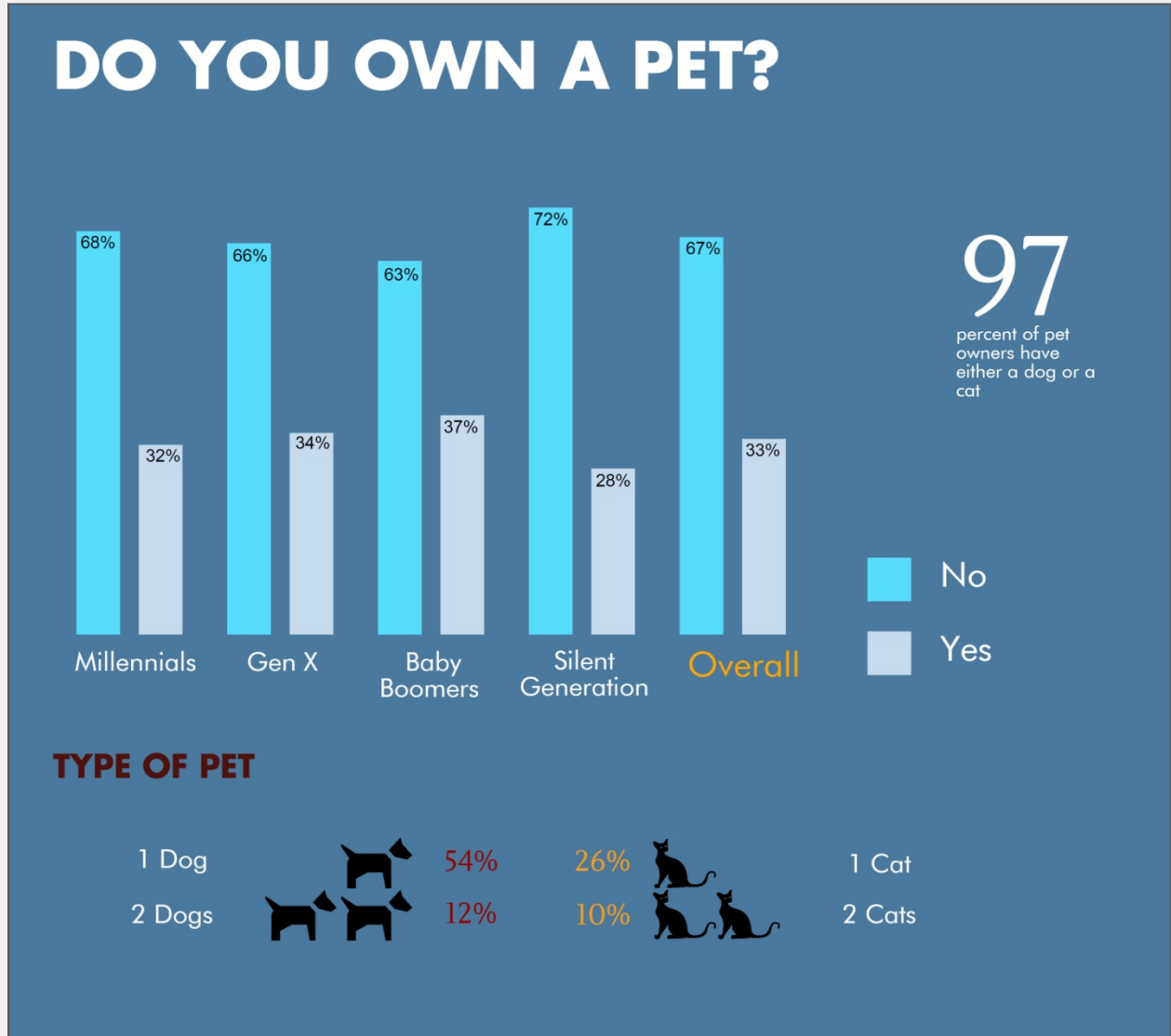
## NUMBER OF CARS IN HOUSEHOLD





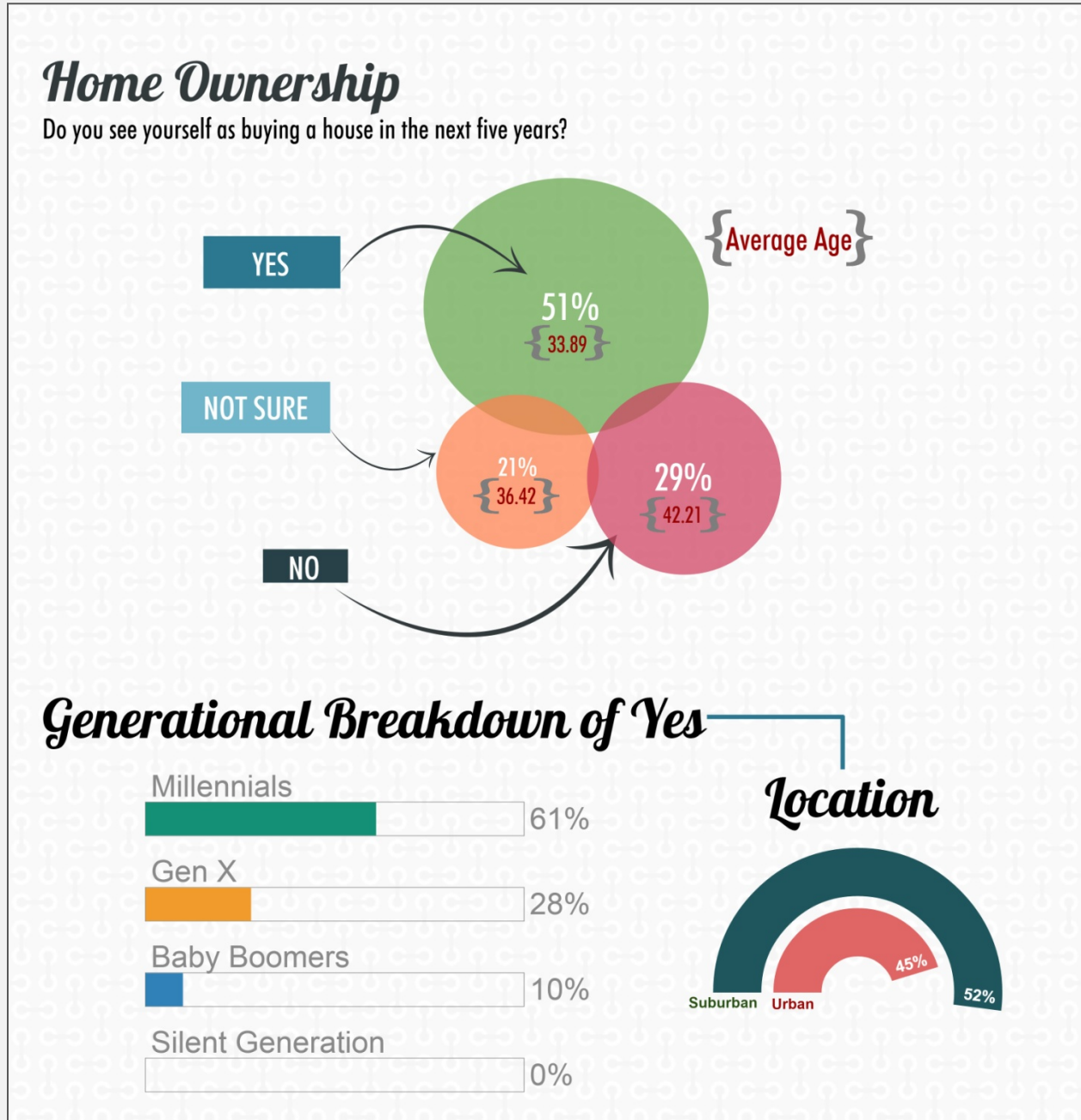
## PET OWNERSHIP

Two thirds (67 percent) of residents do not own a pet.



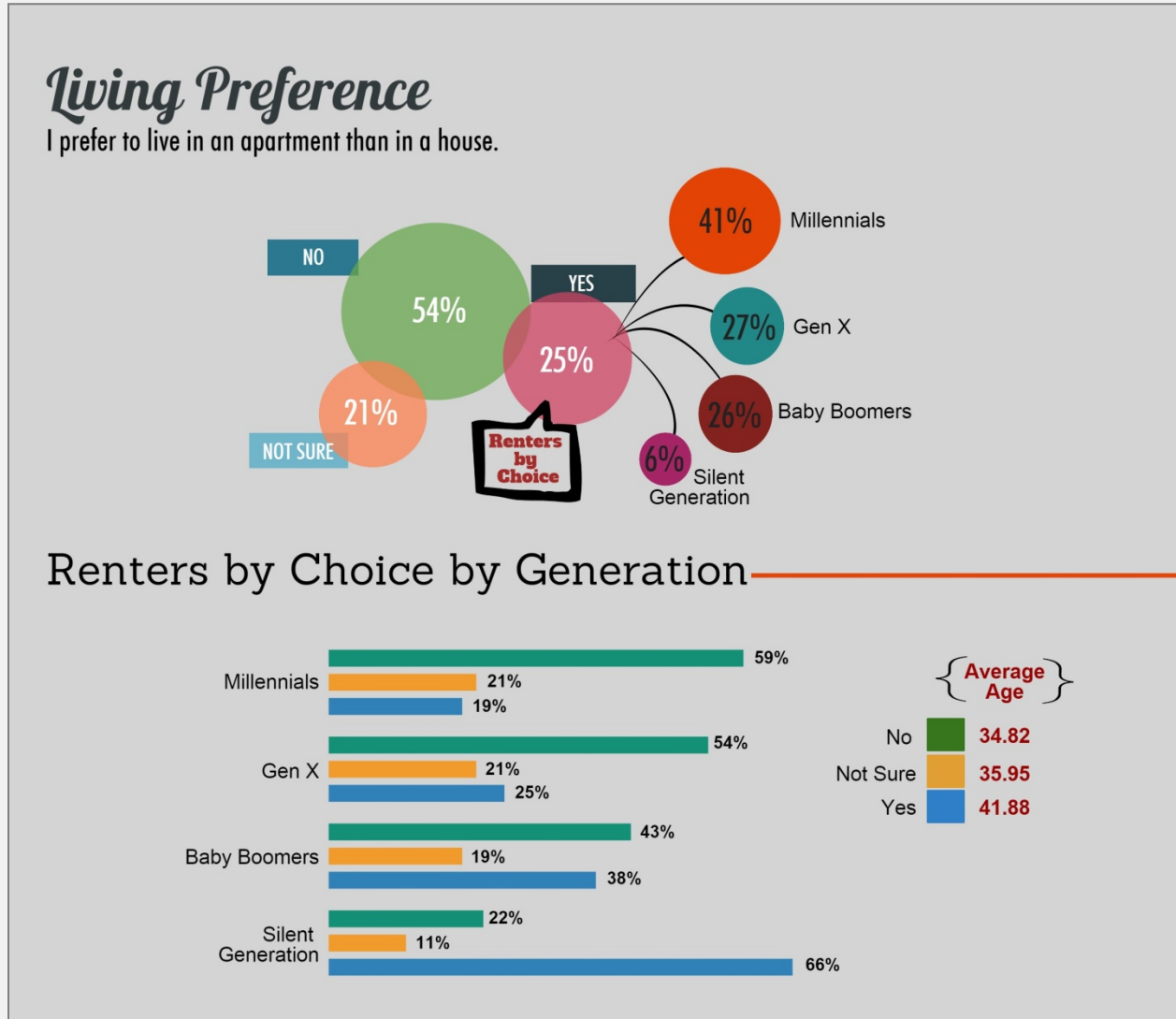
## LOOKING FORWARD TO HOMEOWNERSHIP

The desire to buy a home emerges as top-of-mind among the residents, with 51 percent seeing themselves as buying a house in the next five years, while 29 percent do not. It did not come as a surprise that the younger cohort (61 percent Millennials and 29 percent Gen X) seems more inclined to purchase a house. A large majority of future home buyers (52 percent) live in apartments in the suburban areas, while 45 percent live in the urban areas.



## RENTERS BY CHOICE

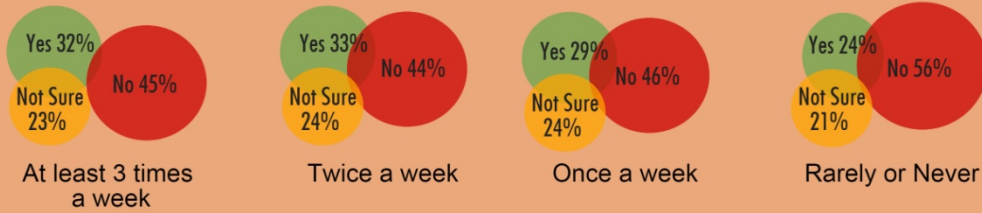
A key discovery in our survey that demands an increased focus is related to what we call **Renters by Choice**. We define Renters by Choice as residents who prefer to live in an apartment than a house. And, twenty-five percent of the respondents fall under this category. Of this 25 percent, Millennials are the front runners (41 percent), followed by Gen Xers (27 percent). Baby Boomers came third at 25 percent and Silent Generation were only 8 percent.



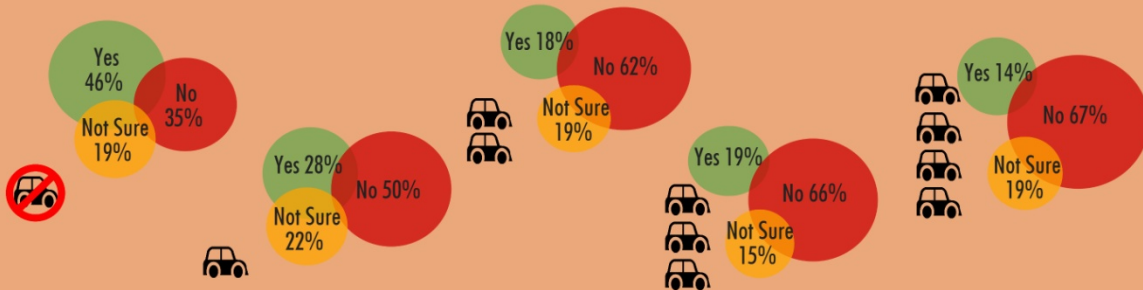
Meet Joe Townend, a quintessential Renter by Choice. He's 41 plus, does not own a car, but prefers to use mass transit system. He rarely or never cooks. Joe prefers to stay fit by playing tennis rather than running.

## Renters by Choice

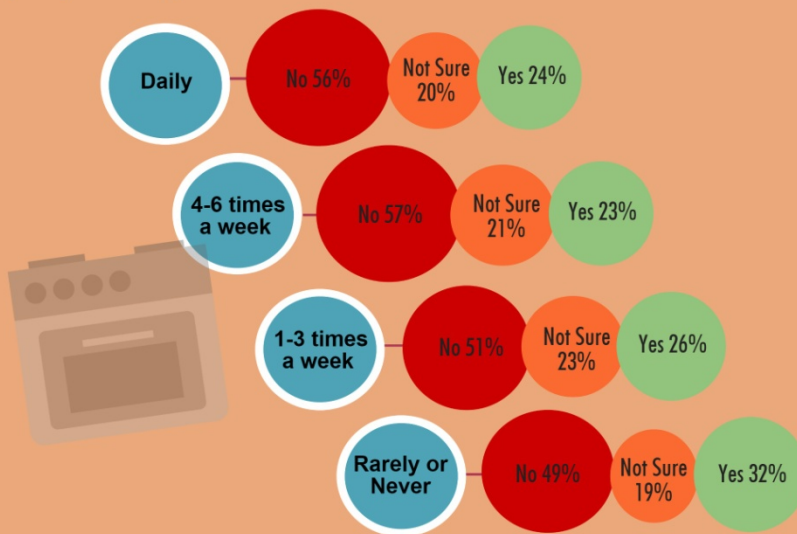
### Use of mass transit



### Number of cars owned



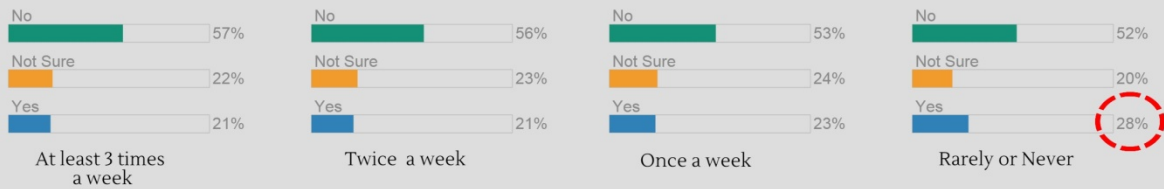
### Frequency of cooking



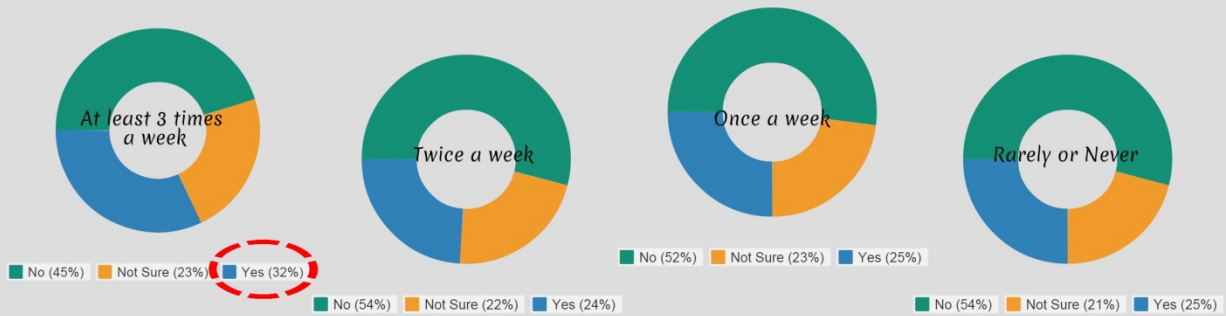
## Renters by Choice

Health and Fitness Activity Preference

### Frequency of Running



### Frequency of Playing Tennis

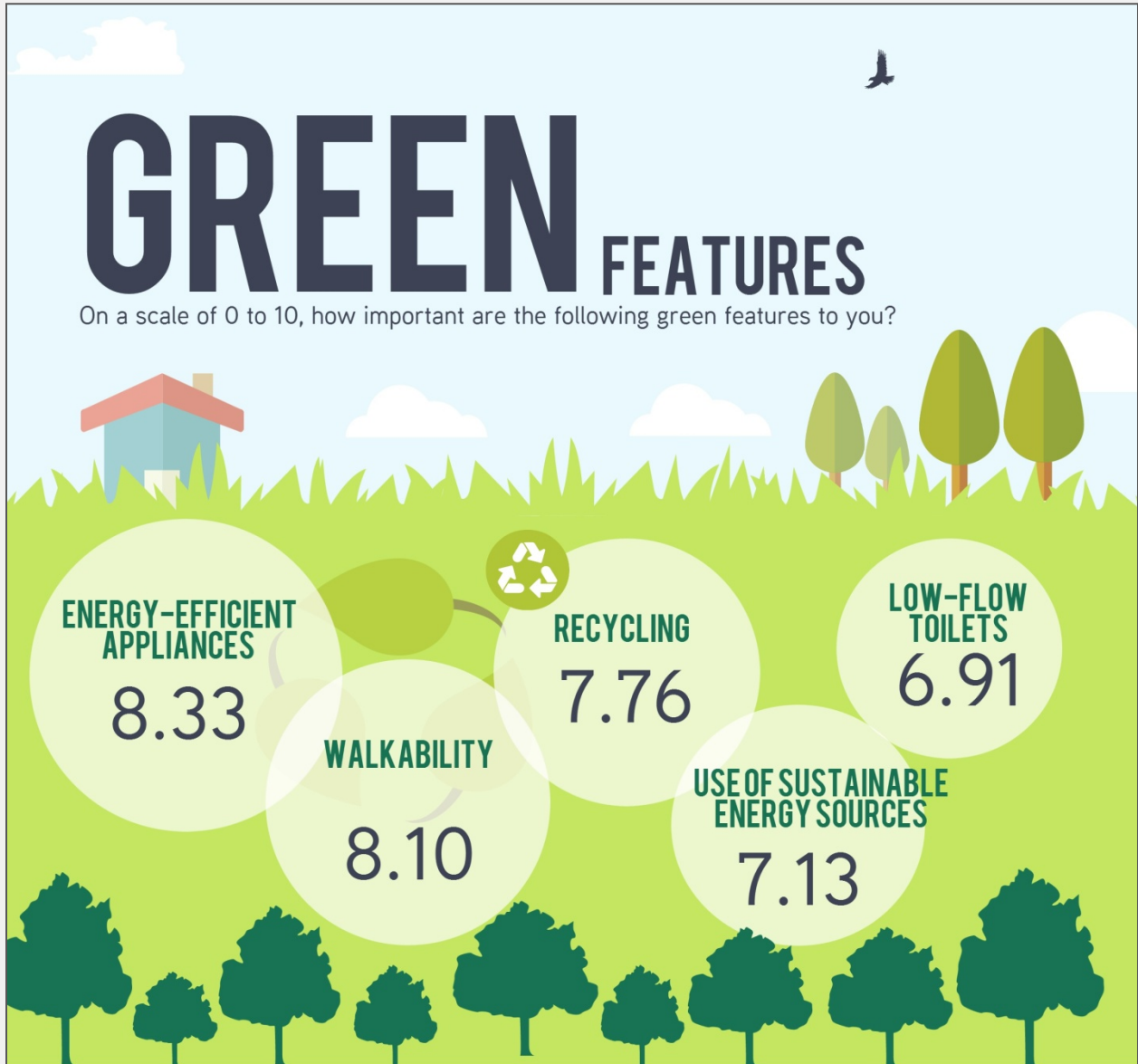


## ECO-CONSCIOUSNESS

With a focus on environmental consciousness, we probed for the most desired green features in an apartment community, the inclination to buy an electric car, how likely are the residents to use a co-op community garden, and how often they recycle. Embracing green living comes at an additional price. We also questioned the residents about how much extra are they willing to pay for each green feature. Unfortunately, the results mirror what previous research has shown—residents appreciate the idea of green as long as it saves them money, but the majority of them are not willing to pay an additional price for green features.

### Highlights:

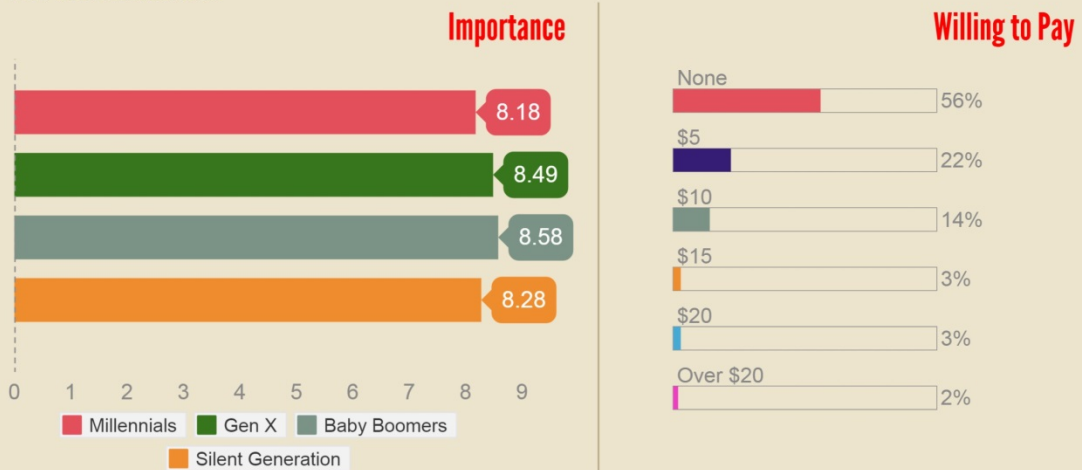
- The top three preferred green features on a scale of 0-10 are **energy-efficient appliances** (8.33), walkability (8.10), and recycling (7.76).
- **Recycling** is the green feature for which residents (22 percent) are most willing to pay an additional \$5.
- Only 17 percent of residents recycle daily.
- Less than 5 percent of residents said that they are likely to use a **co-op community garden**.
- The majority of the residents (64 percent) do not see themselves as buying an **electric car** in the next five years, only 17 percent do.



# GREEN FEATURES & WILLINGNESS TO PAY

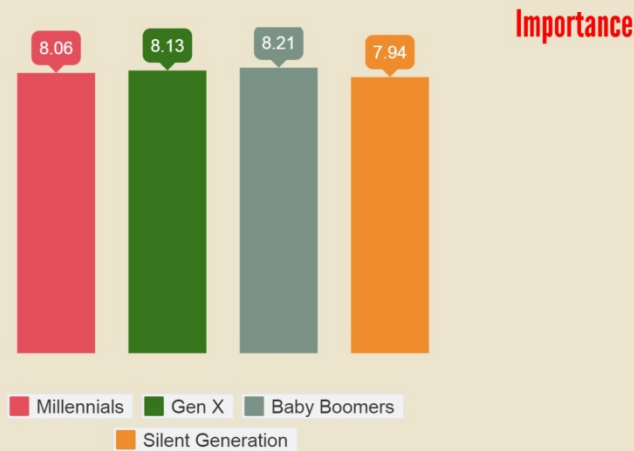
## Energy-efficient appliances

With a ranking of 8.58, energy-efficient appliances are most desired by Baby Boomers. Only 22 percent of the respondents are willing to pay an additional \$5 for this feature.



## Walkability

Ranked at 8.21, walkability is most preferred by Baby Boomers.



Importance is ranked on a scale of 0 to 10

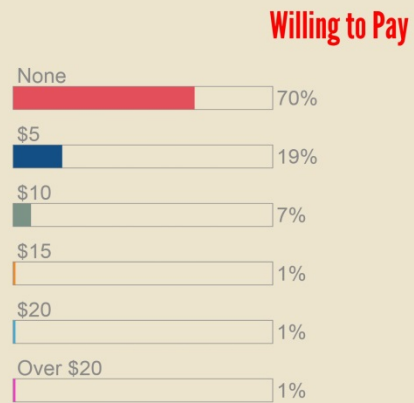
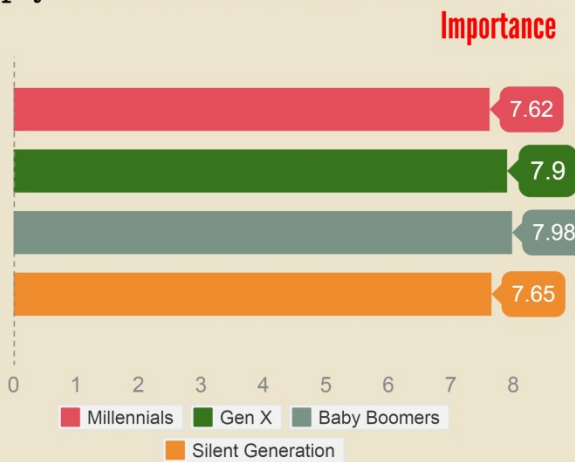


# GREEN FEATURES & WILLINGNESS TO PAY

## Recycling



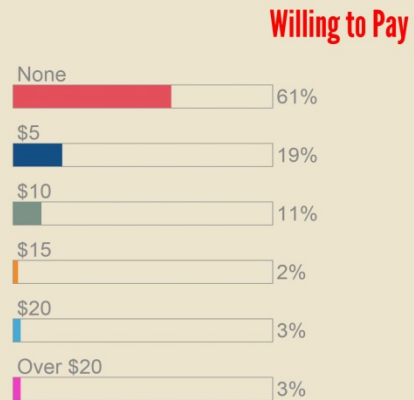
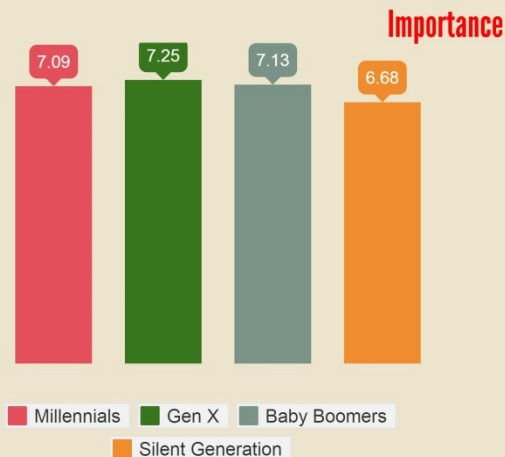
Among the age groups, Baby Boomers, yet again, lead the ranking for recycling (7.98) as a preferred green feature. Only 19 percent of the residents are willing to pay an additional \$5 for this feature.



## Use of sustainable energy sources (wind/solar)



Beating the Baby Boomers, the Gen Xers lead the ranking for sustainable energy sources (7.25). Only 19 percent of the residents are willing to pay an additional \$ 5 for this feature.



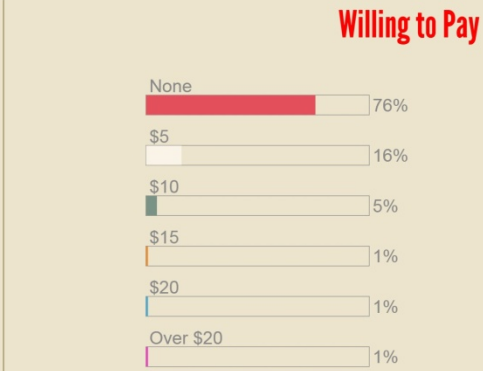
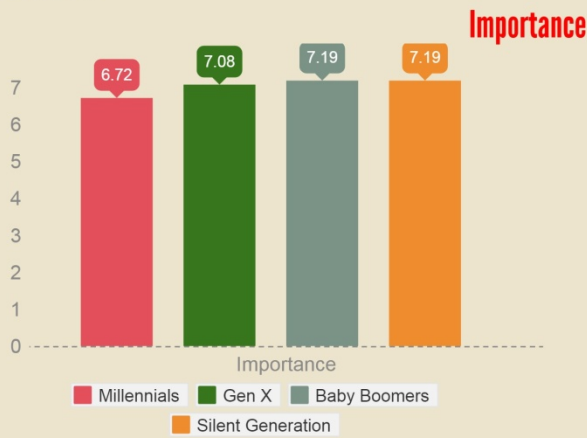
Importance is ranked on a scale of 0 to 10

# GREEN FEATURES & WILLINGNESS TO PAY

## Low-flow toilets



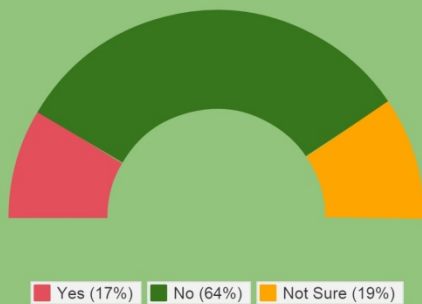
Baby Boomers and the Silent Generation unanimously ranked low-flow toilets at 7.19. Only 16 percent of residents are willing to pay an additional \$5 for this feature.



## Electric Car



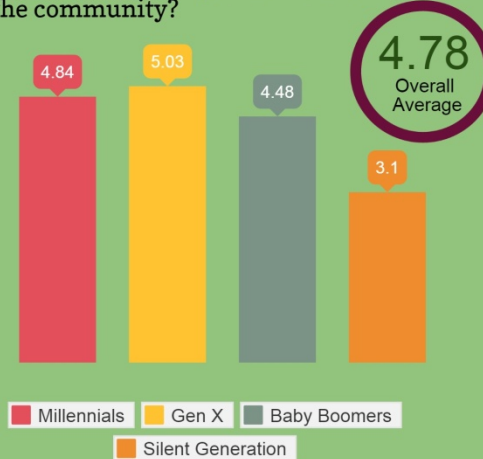
I see myself as buying an electric car in the next five years.



## CO-OP Garden



On a scale of 1 to 10, with 10 being the most likely, how likely are you to use a Co-op Garden in the community?

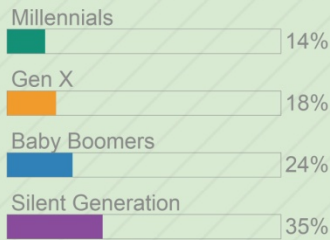




# RECYCLING

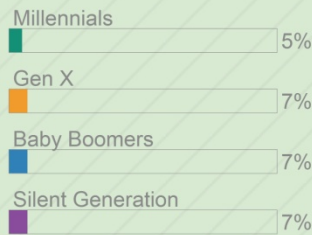
Though recycling was ranked as the third most desired green feature, only 17 percent of the residents recycle daily with the Silent Generation recycling most actively.

## Recycle Daily



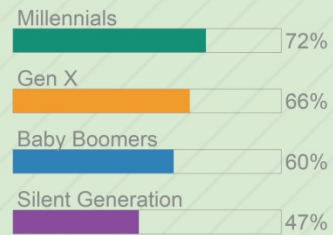
17% Overall Average

## Once a Week



6% Overall Average

## Rarely or Never



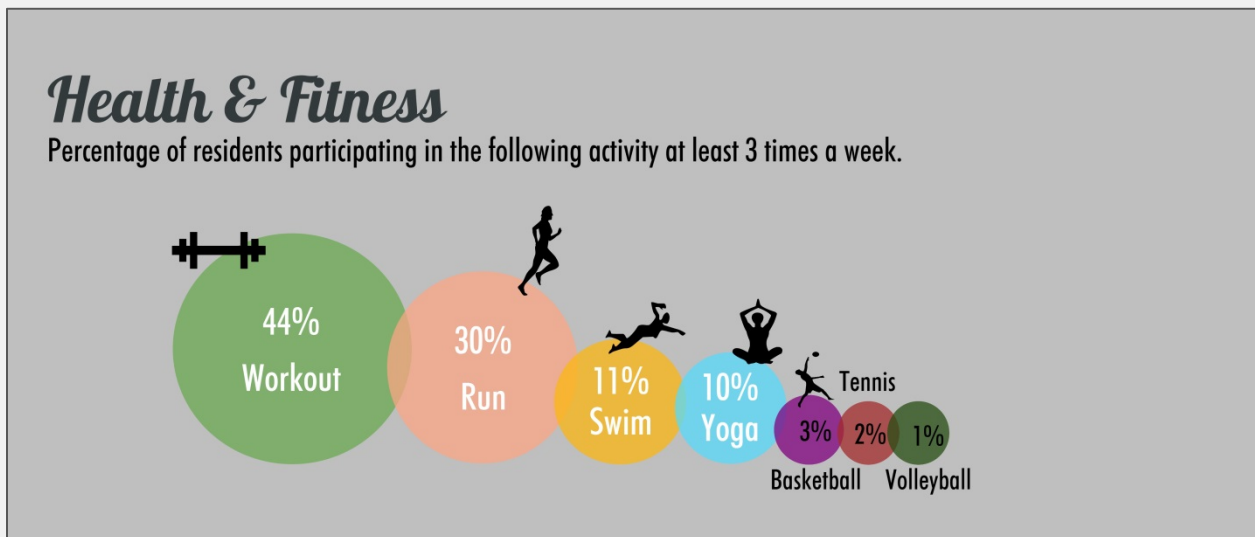
68% Overall Average

## HEALTH AND FITNESS

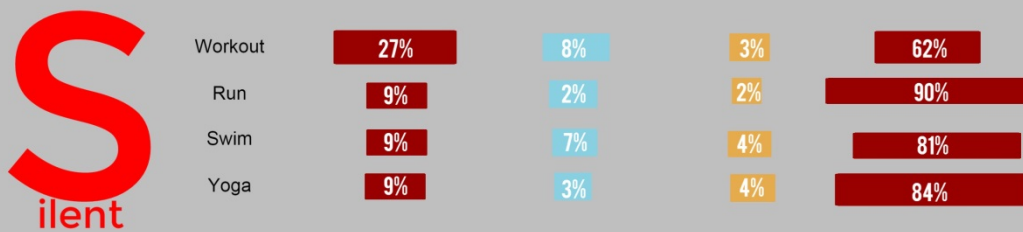
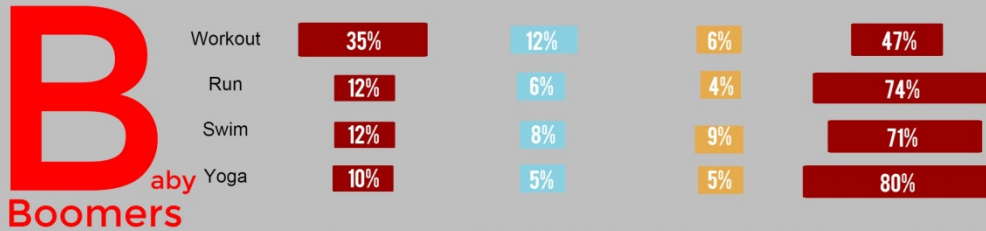
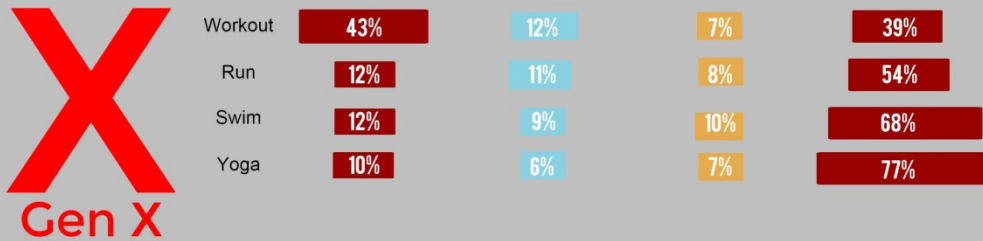
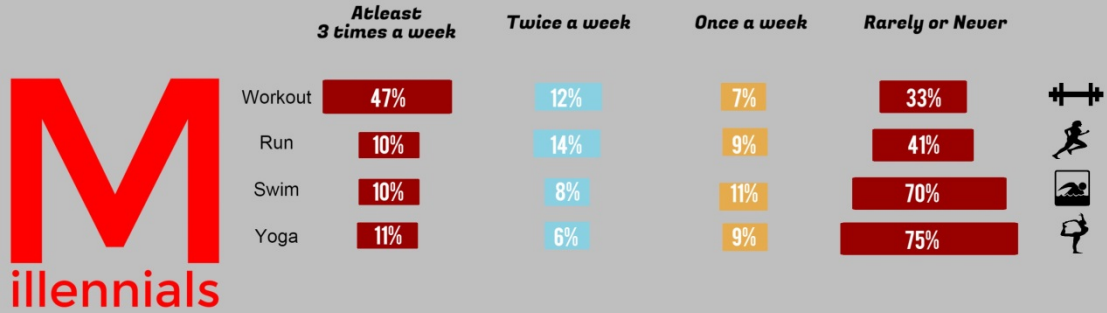
The residents prefer a variety of means to stay fit with working out being the most preferred.

### Highlights:

- To stay fit, the top activities residents participated in at least three times a week are: **working out** (44 percent), running (30 percent), swimming (11 percent) and yoga (10 percent).
- Most residents unanimously expressed the need for a **large gym**, open 24 hours, with a variety of modern exercise machines and equipment, as well as fitness classes.



## Activity by Generations



## SOCIAL BEHAVIOR

To gauge the social characteristics of the residents we asked a host of questions related to weekday/weekend evenings, entertaining guests, enjoying wine, visiting nightclubs, and playing poker.

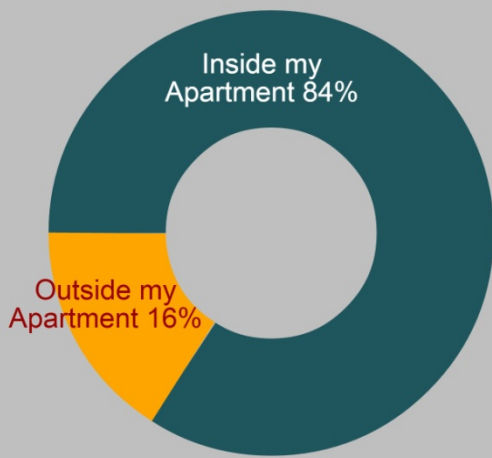
### Highlights:

- The majority of the residents (84 percent) spend their **weekday evenings** inside their apartment, while on weekend evenings, 58 percent reported being outdoors.
- Age is an influential factor in determining this behavior with 63 percent Millennials, 58 percent Gen X, 47 percent Baby Boomers, and 29 percent Silent Generation spending their **weekend evenings** outdoors.
- The residents gave a mixed response to **enjoying wine** with 43 percent of respondents never or rarely enjoying wine, while 40 percent enjoying wine at least three times a month.
- **Entertaining** had a similar response with thirty eight percent entertaining at least three times a month, while 34 percent never or rarely entertain.
- The interest in **nightclubs** was an unequivocal no. Almost three quarters of the residents never or rarely visit nightclubs. Only 12 percent indicated visiting a nightclub at least three times a month.
- **Playing poker** did not score big with the residents with 92 percent indicating that they rarely or never play poker.

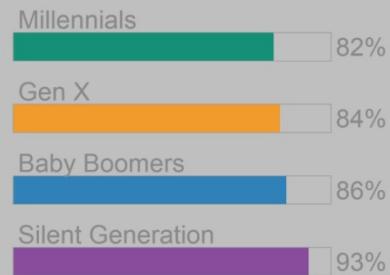
# EVENINGS

WHERE DO YOU SPEND YOUR EVENINGS?

## WEEKDAYS

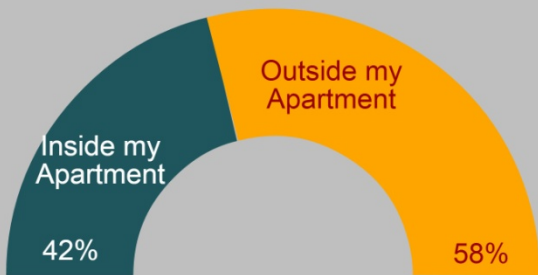


### By Generation

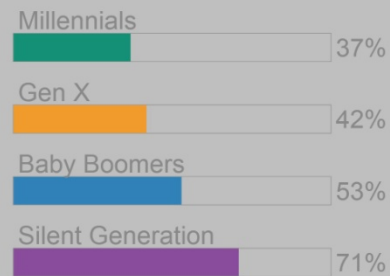


Percentage of residents indicating spending their weekday evenings inside their apartment

## WEEKENDS



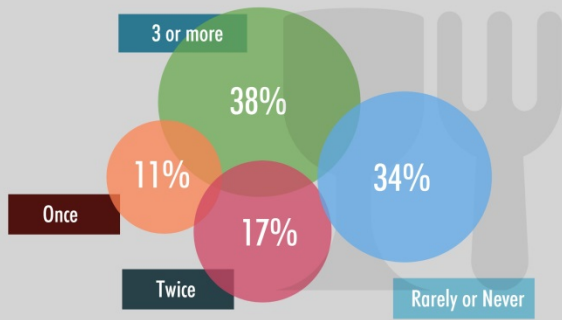
### By Generation



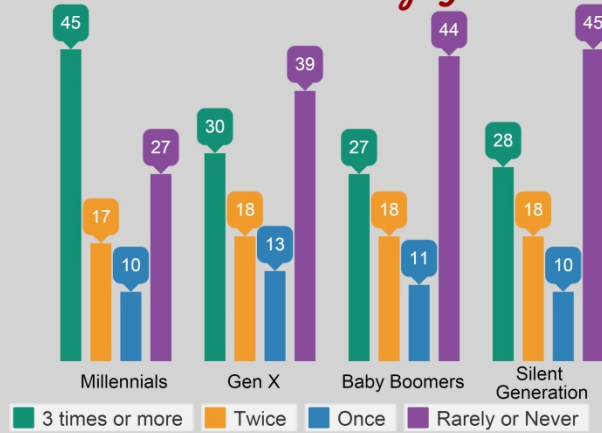
Percentage of residents indicating spending their weekend evenings inside their apartment

## Social Behavior

How many times a month do you entertain guests at home?

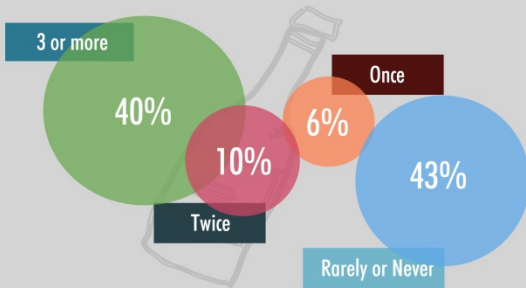


### By Generation

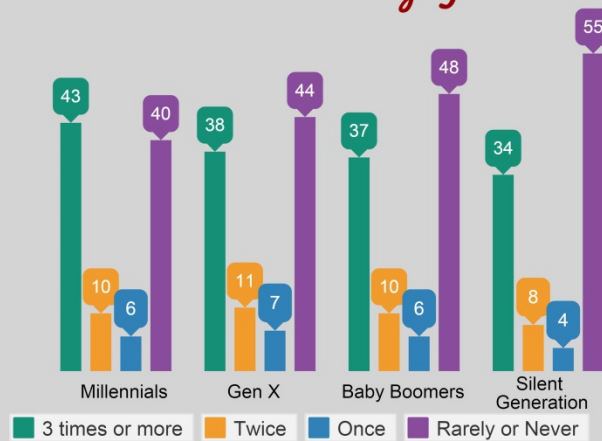


## Wine

How many times a month do you enjoy wine?



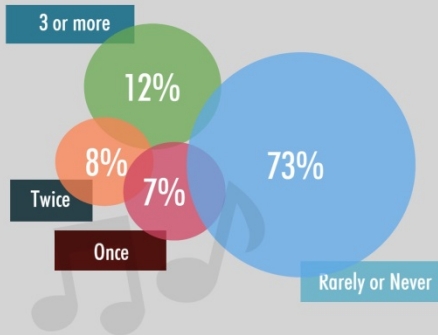
### By Generation



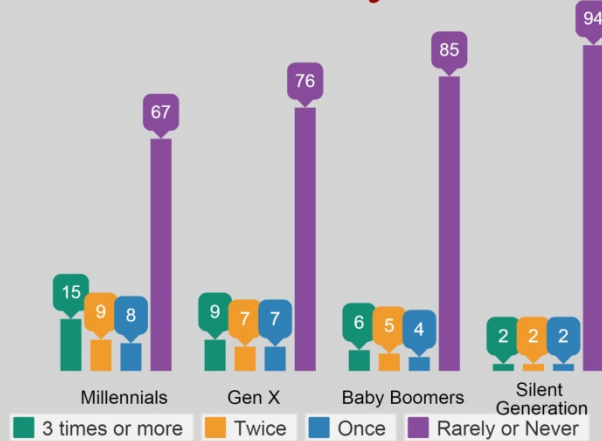


## Social Behavior

How many times a month do you go to night clubs?

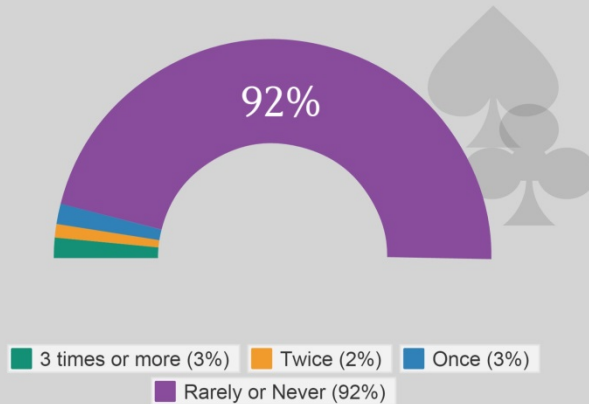


### By Generation



## Poker

How many times a month do you play poker?



## PERSONAL CHARACTERISTICS

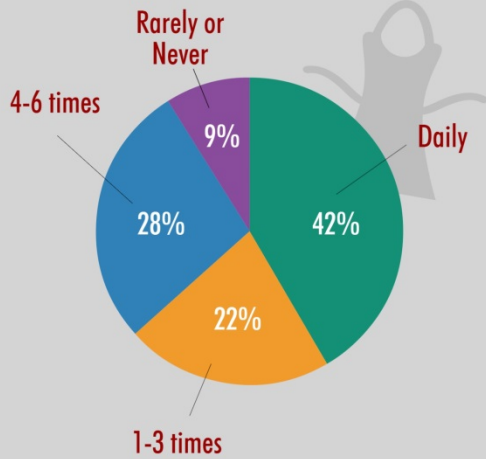
It is imperative for developers and property management companies to closely monitor and understand the personal **attitudes and preferences** of residents. This survey sheds light on specific personal behavior related to cooking and grilling, engaging in sports activities, attending religious services, e-shopping, and the need for extra storage space.

### Highlights:

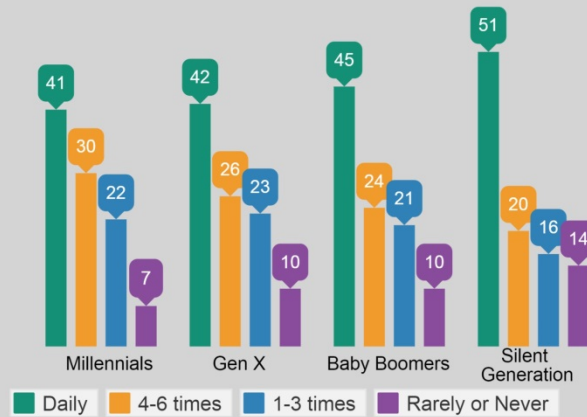
- Forty-two percent of residents **cook** daily.
- Only 25 percent of residents **grill out** three times a month, while 56 percent never or rarely grill out.
- Sporting activities such as **hiking, biking, boating, and other adventure sports** seem to score big with some residents and with some not so much. Forty-two percent residents rarely or never participate in such activities, while 38 percent do at least three times a month.
- Attending a **religious service** is not a top priority for residents, the majority of them (60 percent) rarely or never attend a religious service, only 27 percent attend a religious service at least three times a month. Not surprisingly, the Silent Generation (39 percent) leads in attending a religious service at least three times a month.
- The residents are most interested in **current events** (7.24), followed by **multi-cultural activities** (6.8), **sports** (6.11), and **politics** (5.19).
- Almost half, 48 percent of the residents reported **shopping online** sometimes, 28 percent most of the times, 8 percent always, and 17 percent rarely or never shop online.
- For the most part (81 percent), residents don't rent **storage units**, yet the older the renter, the more interested they are in storage: 29 percent of Baby Boomers and 26 percent of Silent Generation renters indicated the need to rent extra space.

## Personal Characteristics

How many times a week do you cook?

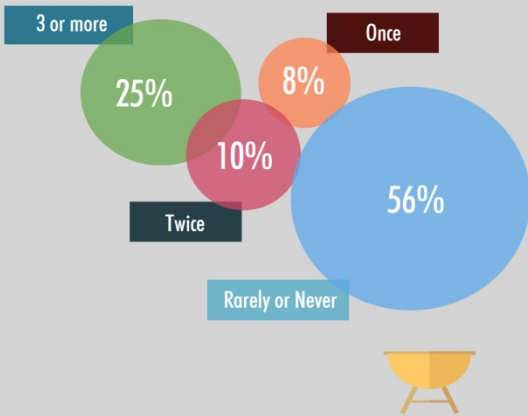


By Generation

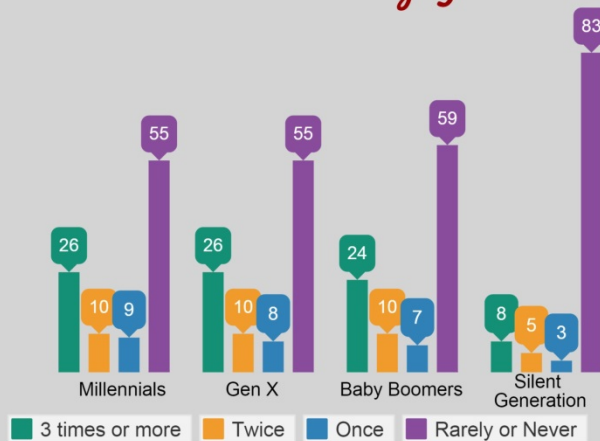


## Grill Out

How many times a month do you grill out?

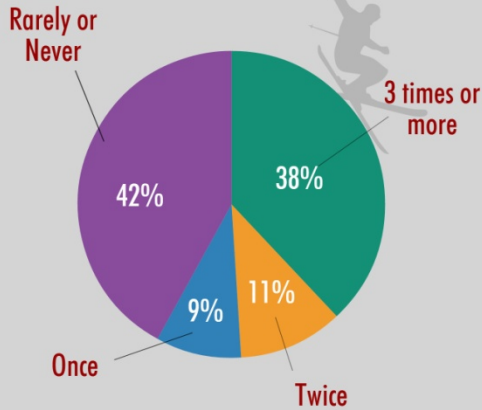


By Generation

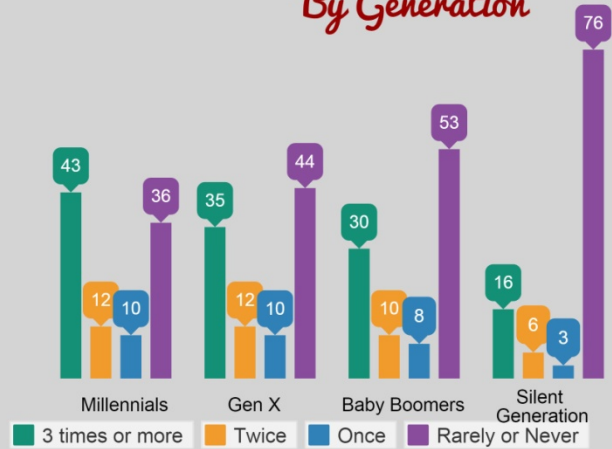


## Personal Characteristics

How many times a month do you engage in Sports Activities (hiking, biking, boating, and adventure sports etc.)?

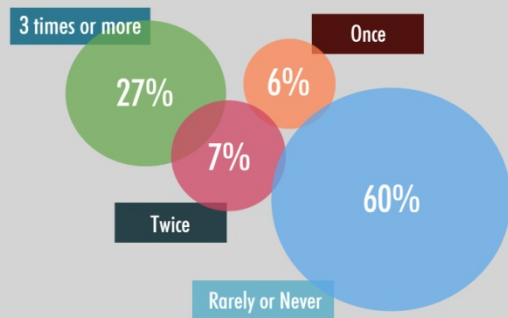


### By Generation

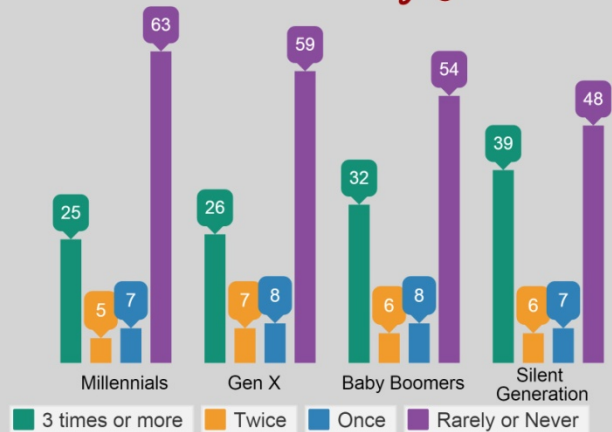


## Religious Services

How many times a month do you attend religious services?



### By Generation

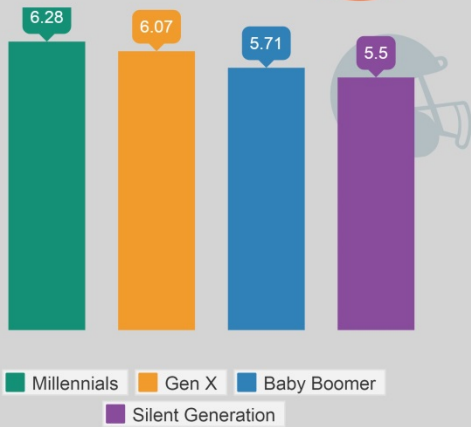


## Personal Characteristics

Rate the following from Strongly Agree (10) to Strongly Disagree (0)

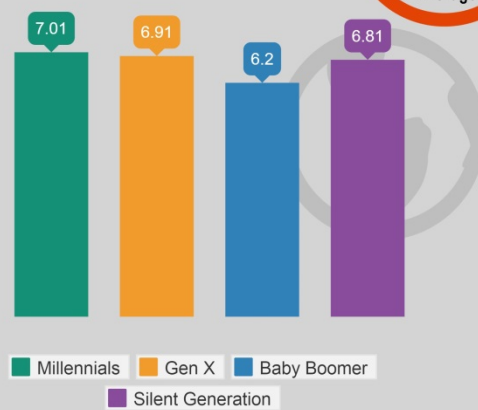
I am a sports fan

**6.11**  
Overall Average



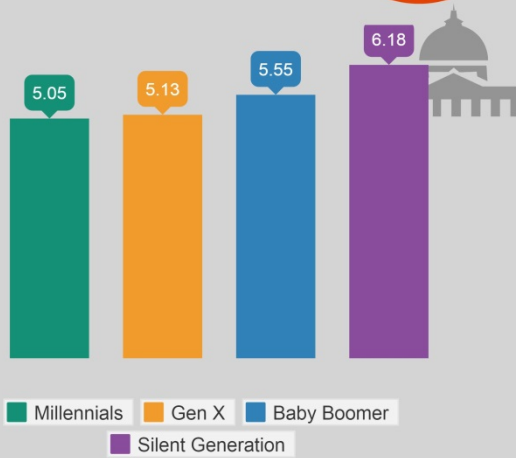
I enjoy multi-cultural activities

**6.81**  
Overall Average



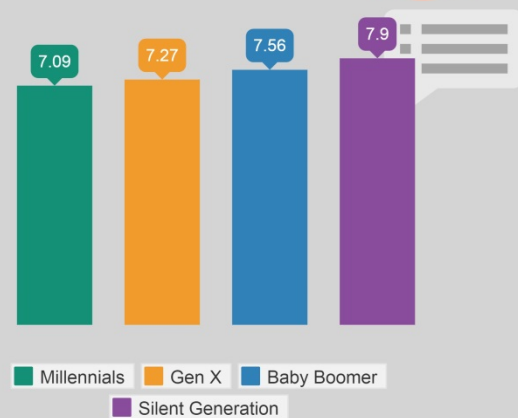
I am interested in politics

**5.19**  
Overall Average



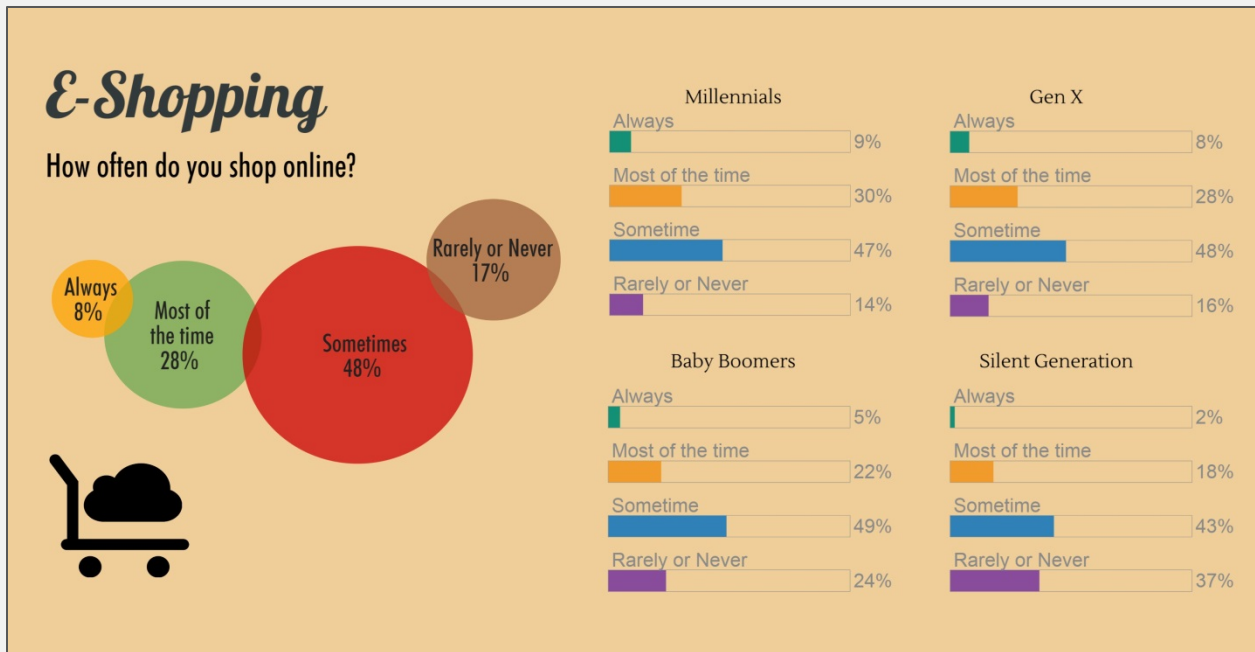
I am interested in current events

**7.24**  
Overall Average



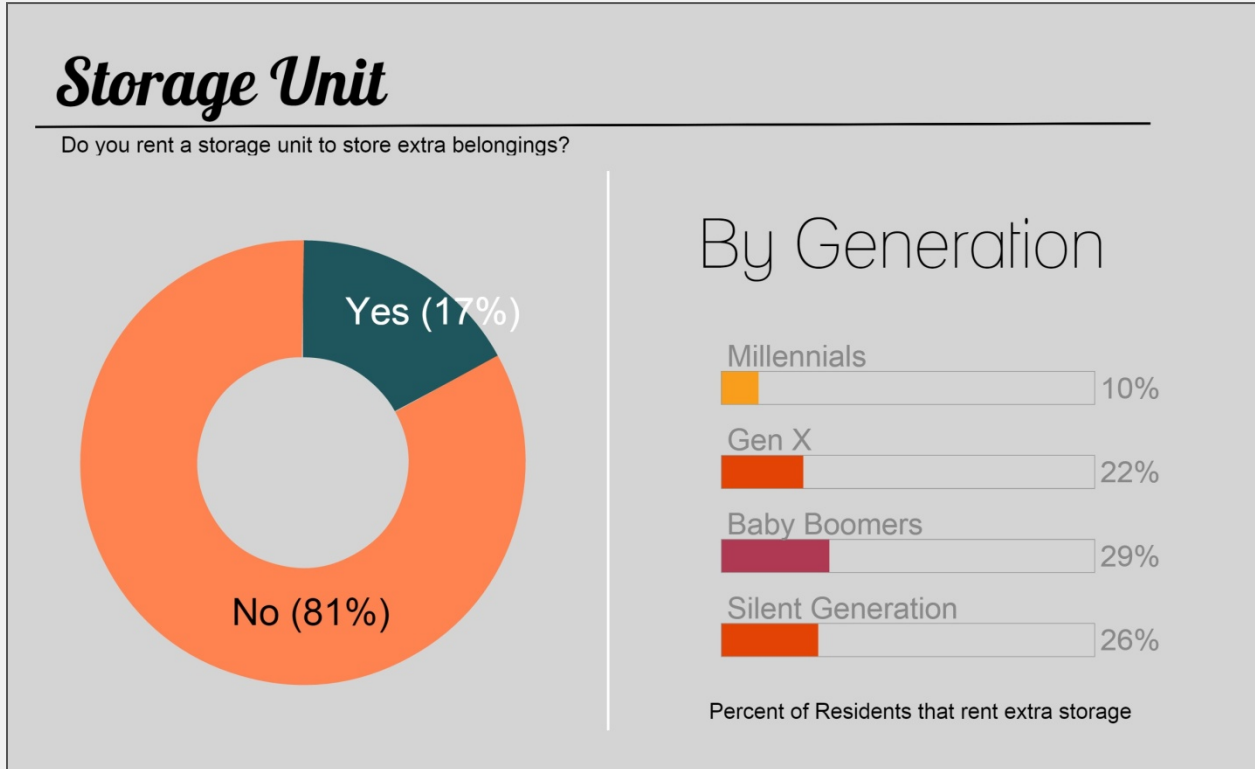
## E-SHOPPING

In the contemporary world, Internet connectivity in a property plays a decisive role in apartment shopping. This is evident from the **online shopping attitudes** of residents. Almost half, 48 percent of the residents reported that they shopped online sometimes, 28 percent most of the times, 8 percent always, and 17 percent rarely or never shop online.



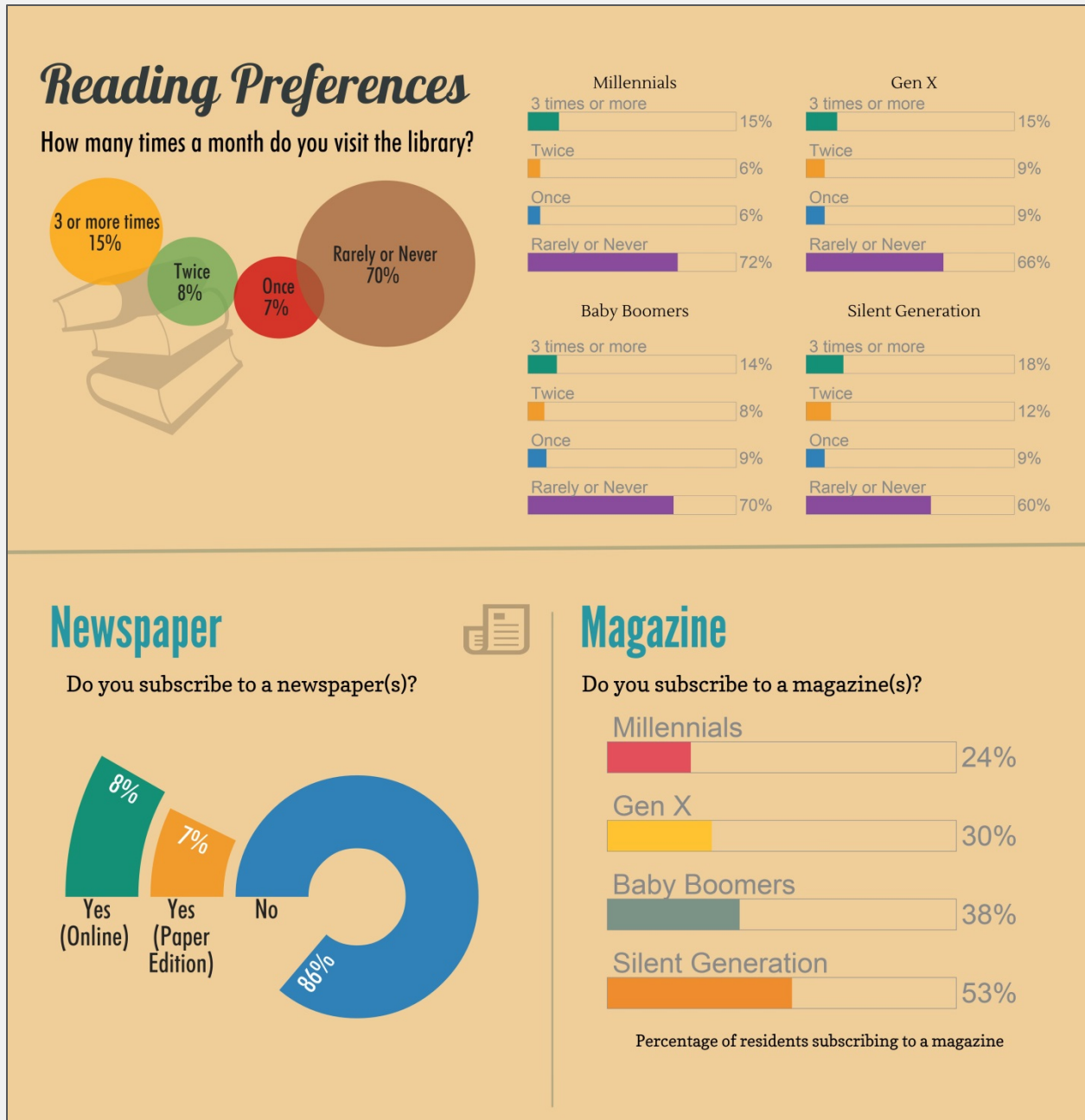
## EXTRA STORAGE SPACE, SAVE THAT FOR LATER!

For the most part (81 percent), residents don't rent storage units, yet the older the renter, the more interested they are in storage: 29 percent of Baby Boomers and 26 percent of Silent Generation renters indicated the need to rent extra space.



## READING PREFERENCES

The survey raises questions about the news and information sources of residents as majority of them are neither **newspaper** (86 percent) nor **magazine** (71 percent) subscribers. Online subscription to newspapers is also low at 8 percent.





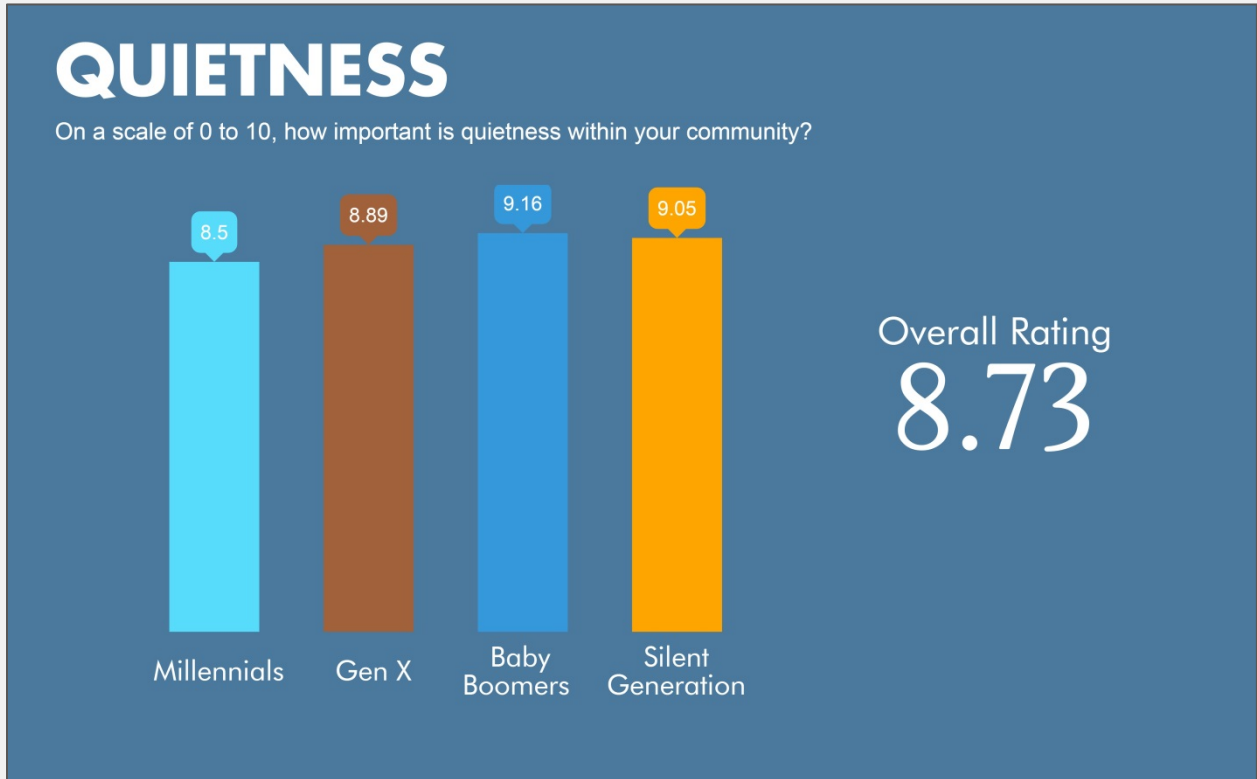
## NEIGHBORING STORE PREFERENCES

Convenience driven by **proximity** of an apartment community to shopping centers and restaurants is known to **influence resident decision-making**. And, when it comes to the kinds of stores they most prefer nearby their apartment community, **grocery store** (73 percent) was the top favorite. *“A grocery store within walking or biking distance is a huge pro,”* said a resident. The next most preferred **nearby retail establishments** were specialty restaurants and cafes (68 percent) and apparel and shoe stores (41 percent). Somewhat important were fast food places at 22 percent and arts and craft stores at 20 percent. Dry cleaning (15 percent) and sporting goods store (13 percent) ranked low on the list.



## SHHH...QUIET, PLEASE!

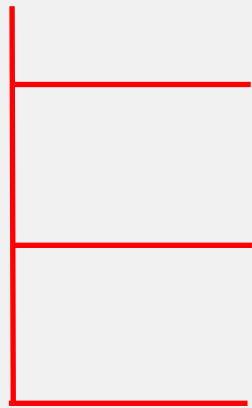
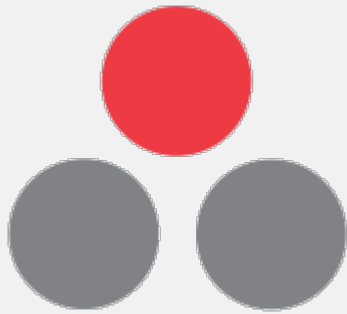
With a rating of **8.73**, on a scale of 0-10, quietness emerged as a highly preferred aspect of apartment living. As aptly described by a resident, *"Peace and quiet is essential for comfort living"*. Many residents expressed that the solution for a quiet environment could be found in sufficient and better insulation between floors and walls of each unit.



## RESIDENT SPEAK

Keyword frequency from open-ended suggestions shared by residents.

<b>2003</b> parking	<b>1613</b> apartment	<b>1481</b> community	<b>1100</b> people	<b>970</b> residents
<b>965</b> area	<b>835</b> rent	<b>790</b> pool	<b>709</b> nice	<b>678</b> dog
<b>646</b> building	<b>639</b> make	<b>611</b> areas	<b>583</b> noise	<b>533</b> space
<b>505</b> time	<b>489</b> pay	<b>487</b> live	<b>482</b> Management	<b>478</b> security
<b>452</b> kids	<b>451</b> great	<b>447</b> neighbors	<b>439</b> work	<b>429</b> dogs
<b>425</b> walls	<b>424</b> living	<b>420</b> trash	<b>415</b> windows	<b>414</b> children place
<b>406</b> clean	<b>395</b> tenants	<b>377</b> room water	<b>362</b> gym	<b>355</b> sound
<b>354</b> hear	<b>353</b> walking	<b>342</b> lot	<b>341</b> good	<b>339</b> office
<b>338</b> love	<b>335</b> car	<b>332</b> play	<b>331</b> important	<b>330</b> storage



**research@jturnerresearch.com**



**281.558.4840**



**jturnerresearch.com**