

The Great OLON LINE Apartment Adventure

About J Turner Research

J Turner Research is an independent research company focused exclusively on the multifamily industry for over two decades.

It is the only company to monitor the online reviews and ratings of 145,000+ properties nationwide.

J Turner pioneered the **Online Reputation Assessment (ORA®) score**, which serves as the multifamily industry standard to measure, benchmark, and compare a property/company's online reputation. J Turner is the national leader in enhancing resident satisfaction through intelligent resident and prospect survey programs, AI-driven data analysis, quantifiable action plans, customized training, social media and listings management, and review response service.

<http://www.jturnerresearch.com>.

J Turner Research has produced several groundbreaking national research studies highlighting emerging trends, shifting demographics, industry best practices, and new market opportunities in the multifamily industry. To download our research, please visit <https://jturnerresearch.com/research>.



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Internet Adventure Timeline

2012–2015: Pre-Internet Adventure

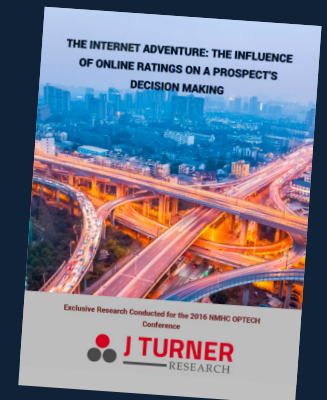
J Turner Research establishes that prospective renters are increasingly willing to use online ratings and reviews to guide where they tour and ultimately choose to live.

- 42% of renters say they would be willing to post an online review about their apartment community (2012).
- Yelp is the most trusted site among prospective renters, followed by Rent. (2012).
- 77% of renters say they use ratings and reviews to search for an apartment (2015).
- Trust shifts as Google becomes the most trusted review site, followed by Yelp and ApartmentRatings (2015).

2016: The Internet Adventure, Part I

J Turner Research demonstrates that online ratings and reviews have become a significant influence on the apartment search process, shaping how prospective renters evaluate, tour, and lease communities.

- 83% of renters say they use ratings and reviews to search for an apartment.
 - 70% choose apartments with a higher ORA Score.
- Renters rate the importance of review information as 7.45/10 when deciding where to tour and 7.19/10 when deciding where to lease.
- Star ratings are the most important review element for 41% of prospective renters, outweighing review content, recency, and sentiment.
 - As a result, renters tour an average of just 5.2 communities.
- While Google remains the most trusted source, review volume becomes nearly as influential as platform.

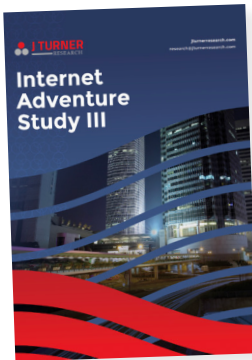


2018: The Internet Adventure, Part II

Online ratings and reviews continue to reshape both renter behavior and property operations.

- Industry professionals identify online ratings and reviews as the number one operational challenge for the second consecutive year.
- Despite their growing influence, only 27% of renters report being asked to leave a review.
- Renters' willingness to let reviews influence where they lease increases to 7.37/10.
 - Reviews account for an estimated 52% of the leasing decision.

2021: The Internet Adventure, Part III



Knowing online reviews are now an inevitable part of the apartment search, J Turner Research explores how renters evaluate them.

- Renters actively research 14.31 properties but tour only 4.22.
 - Review content becomes increasingly important beyond star ratings, with 78% saying it affects consideration.
 - 61% say reviews older than two years are no longer relevant.
 - Prospects place greater trust in communities with strong ratings across multiple review sites.
- While online ratings and reviews remain the most important factor in selecting a community for 31% of renters, the feeling that the onsite team genuinely cares is the strongest driver of leasing decisions (55%).

2023: The Internet Adventure, Part IV

J Turner Research explores how prospective renters curate the shortlist of communities they ultimately tour, highlighting the growing importance of location-based search and negative reviews.

- “Near me” Google searches and map functionality within ILSs become increasingly popular.
- As renters expand beyond traditional apartment options, Zillow (used by 37% of prospects) emerges as a major multifamily search platform alongside Apartments.com.
- Only 6.6% of Gen Z, and just 16% of renters overall, say they do not use reviews during their apartment search.
- 59% of prospective renters avoid applying to or leasing at a community they previously considered because of negative reviews or a low star rating.

2025: The Internet Adventure, Part V

As prospective renters become more skeptical and increasingly adept at researching online, the apartment search process becomes far more intentional and efficient.

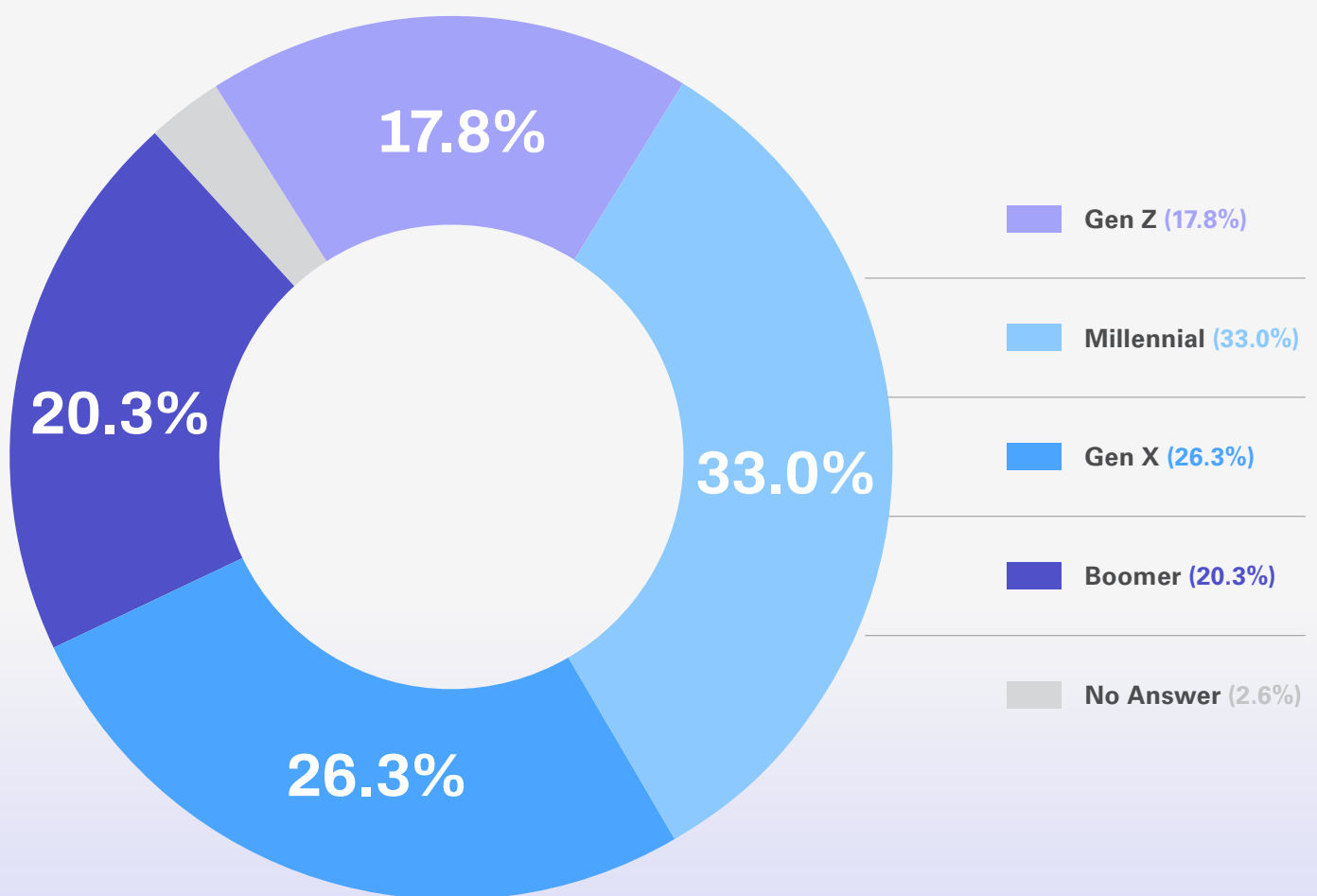
- 70% of prospective renters say resident happiness is an important consideration during their apartment search.
- Google (used by 68% of renters) is the primary search resource, followed by Apartments.com (39%), Facebook (36%), and Zillow (36%), while traditional ILSs such as Apartmentguide (8%) and ApartmentRatings (3%) continue to decline.
- Star ratings remain an immediate qualification metric: the average prospect will consider a minimum rating of 3.75 stars, while 4.44 stars is viewed as ideal.
- Renters research an average of just 5.1 properties and tour only 3.4, demonstrating increasingly efficient online qualification.
- 67% of renters report having been asked to leave a review.
- Avoiding negative outcomes becomes increasingly important. The most significant negative review red flags involve pests, unit condition, financial clarity, and security.
- While renters see value in chatbots, 85% still want the ability to speak with someone onsite, particularly for complex issues.



Respondent Demographics

Internet Adventure VI surveyed 1,060 currently renting or searching adults nationwide, collected in June 2026 via an online consumer panel. The sample is generationally balanced across all four cohorts, split evenly between active searchers and current residents, and skews toward urban and lower-to-middle income markets consistent with the national renter population.

Generational Composition of Respondents



Executive Summary

INTERNET ADVENTURE VI: THE RENTER IN THE AGE OF AI

The apartment industry's most important audience is now arriving pre-informed in ways operators have never had to account for before.

Nearly half of all renters (45.9%) now use AI to research apartments. 5.7% state that an AI tool was the absolute first place they went in their most recent search, bypassing listing sites and even Google entirely. This behavior did not exist as a measurable category in prior editions of this study. The findings below reflect a rental landscape that has changed more in the last eighteen months than in the five years preceding them.

KEY FINDINGS AT A GLANCE

1. The Search Funnel Has Become an Entry System

Listing sites have overtaken Google as the most common first stop, while social media now actively shapes the research process for 54% of prospects. AI has emerged as an entirely new entry point. The prospect reaching out to your community in 2026 has assembled their impression from more sources and with far more skepticism than any prior generation of searchers.

2. AI is Rewriting the Reputation Economy

The star average is no longer the final word; the AI summary is. A negative AI summary drops tour intent at a 4.7-star property for 62.3% of renters, while a positive AI summary can rehabilitate a 4.3-star property for 67.3%. Put to the ultimate test, when a pristine 4.8-star rating conflicts with an AI summary, only 20.2% of renters trust the stars.

3. The Veto Effect is Now Automatic

Finding deal-breakers used to require diligent reading; today, AI surfaces them instantly. Pest infestations are an immediate deal-breaker for 49.3% of renters, and a single mention in 100 reviews is enough to alarm 70% of prospects. Furthermore, nearly half of renters expect the advertised rent to be the all-in price, making hidden fees a trust-destroying event at lease signing.

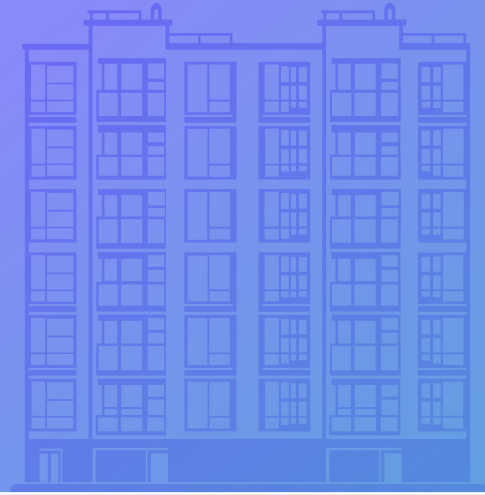
4. Technology Must Amplify, Not Replace, Humans

The chatbot comfort gradient draws a strict boundary: renters welcome AI for basic logistics, but definitively reject it for high-stakes issues. A fully AI-staffed leasing model is a deal-breaker or significant deterrent for 62% of renters. When emergencies arise, 70.4% state that reaching a real, onsite human being is critical to their leasing decision.

5. Retention is a 12-Month Marathon

The renewal conversation is simply the moment where the preceding twelve months are scored. A staggering 73.9% of renters admit that one serious unresolved issue will materially jeopardize their renewal. With ongoing maintenance serving as the top satisfaction driver, and 75.9% of renters demanding proactive, year-round communication, retention must be treated as a full-lifecycle operational commitment.

Navigating the Shattered Map: The Funnel Has Fractured



The apartment search process once followed a predictable, linear path: a prospect executed a Google search, visited a listing site, read reviews, toured a property, and signed a lease. While that sequence still exists, the 2026 data reveals a funnel that has shattered into multiple distinct entry points.

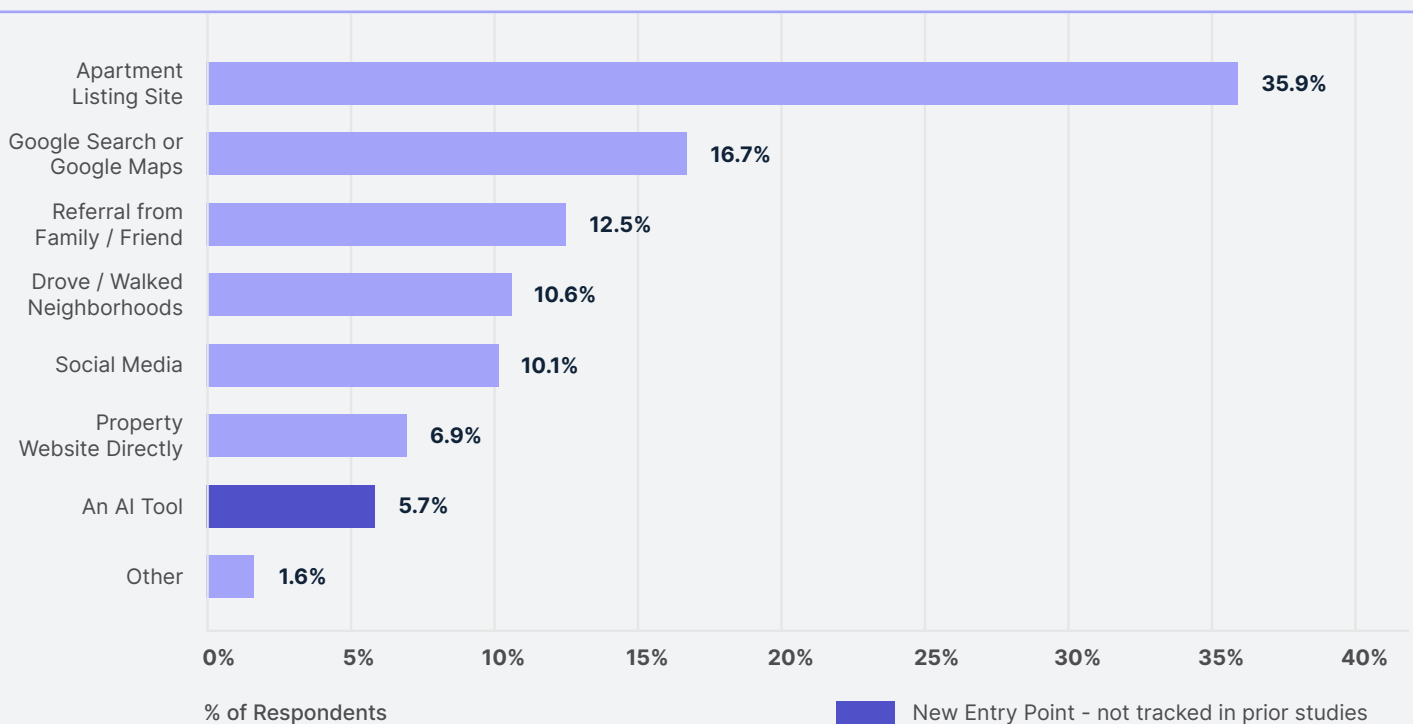
Today's prospects arrive with vastly different expectations and information postures depending on where they begin their journey. While some of these entry points represent the evolution of long-standing trends, two are genuinely unprecedented. Understanding exactly where renters begin their search is the prerequisite for navigating this new landscape.

THE FIRST STEP: WHERE THE JOURNEY ACTUALLY BEGINS

The first question in understanding the apartment search journey is where prospects actually begin.

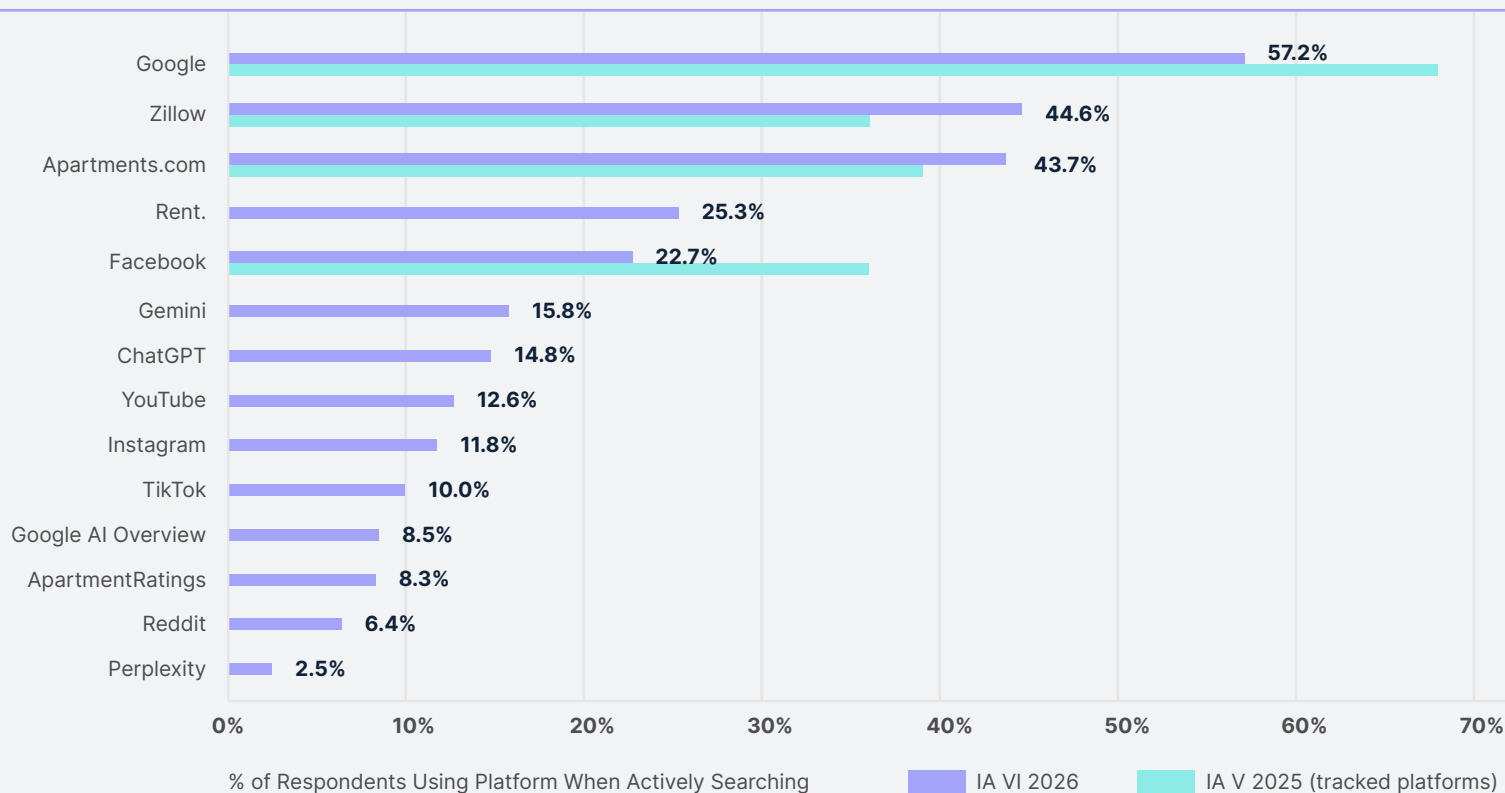
For the largest share of renters (35.9%), that initial stop is now a listing platform, with Apartments.com and Zillow collectively replacing Google as the primary front door to the apartment search. Although Google remains the most widely used platform across the entirety of the search process, its role as the definitive starting line has diminished, drawing only 16.7% of renters for their opening move and dropping from 68% active use in our last study to 57.2% today.

Where Renters Go First When Beginning an Apartment Search



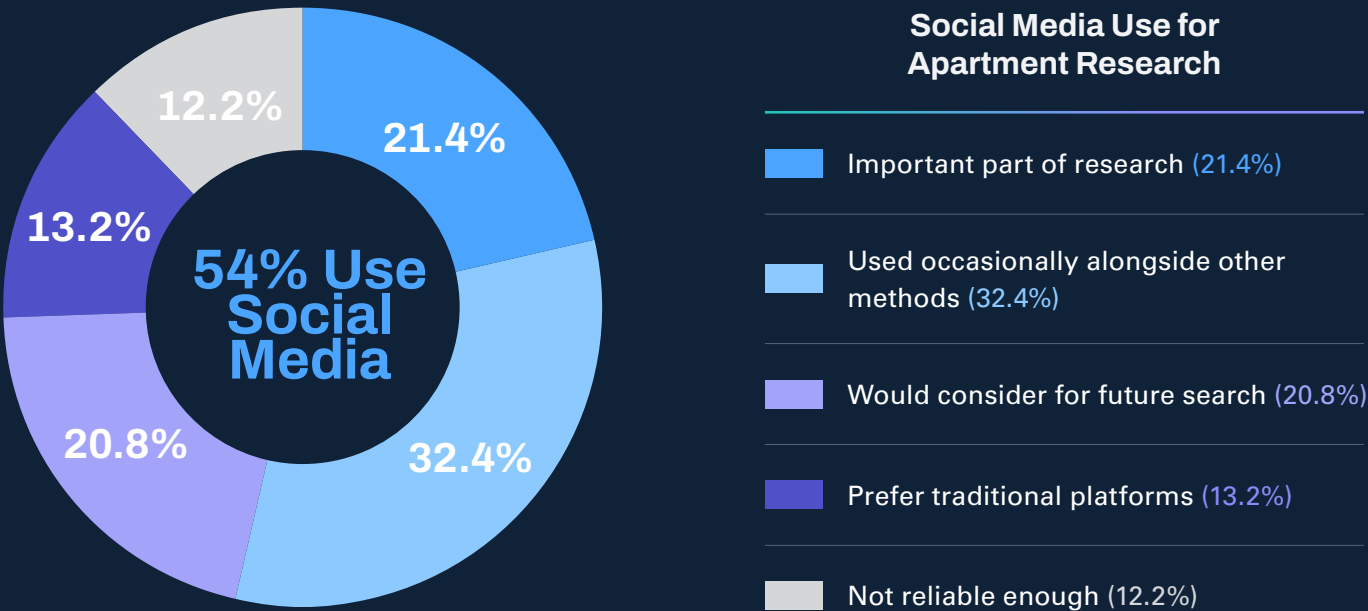
Beneath this top tier, the landscape has reshuffled considerably. Zillow's active use has surged to 44.6%, nearly matching Apartments.com at 43.7%. In contrast, Facebook has experienced a sharp 13-point decline down to 22.7%. While renters are researching an average of 4.5 communities online and physically touring 3.2 (modest declines from our previous study), **this fragmented platform landscape means that operators concentrating their reputation investments in a single channel are now operating with fundamentally incomplete coverage.**

Platform Active Use: % Using Each Platform When Actively Searching

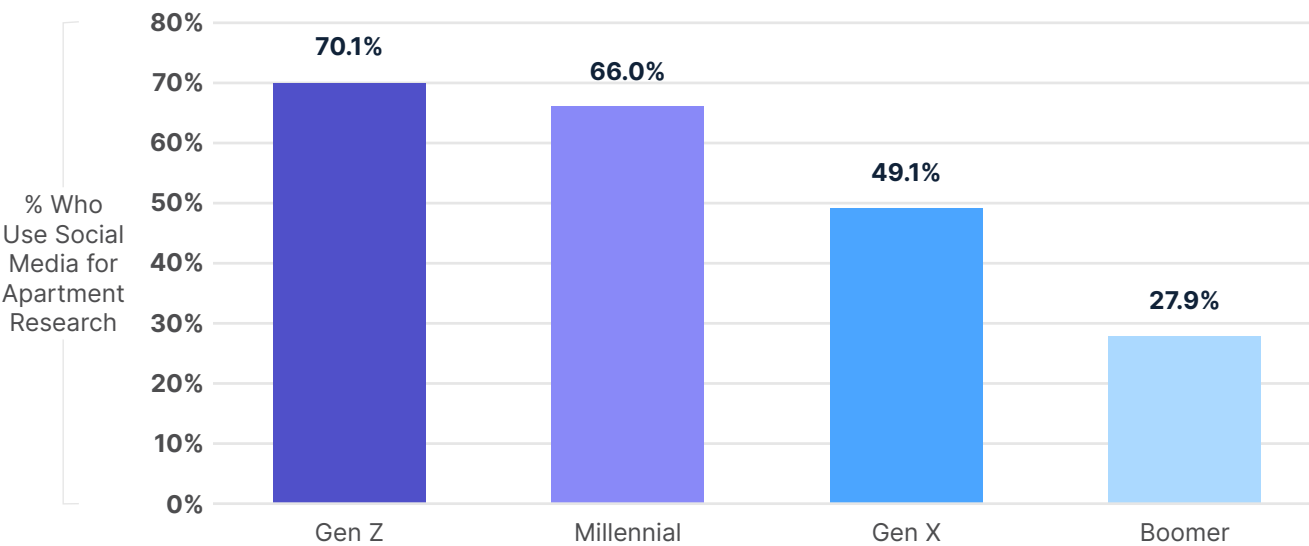


UNFILTERED LENSES: SOCIAL MEDIA GOES MAINSTREAM

Historically, social media occupied the fringes of the apartment search, utilized primarily by a subset of younger renters. **That characterization is definitively dead, as 54% of all renters now use social media or video platforms to research communities before deciding to tour.** Adoption varies significantly by generation, reaching 70.1% of Gen Z and 66% of Millennials, but the defining shift lies with Gen X, where nearly half of renters are now actively using these channels, up from 42% one year ago.

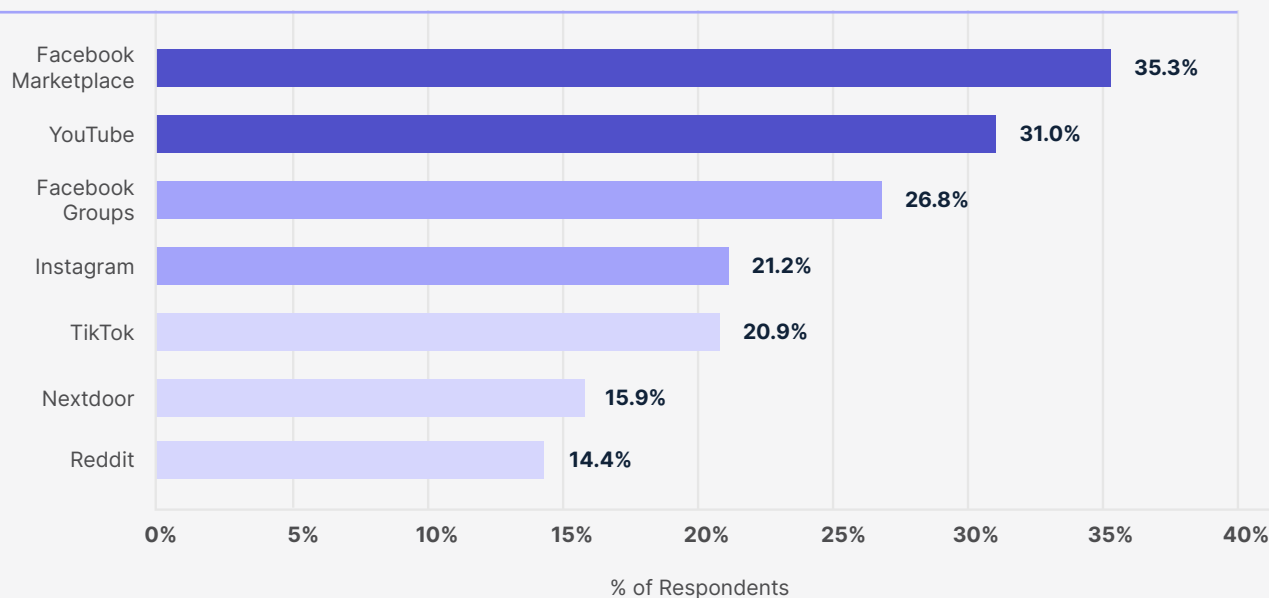


Social Media Use by Generation



The composition of this social research stretches across a wider array of platforms than most operators actively manage, led by Facebook Marketplace (35.3%) and YouTube (31%), followed closely by Facebook Groups, Instagram, and TikTok. **Prospects are not seeking corporate marketing; they overwhelmingly prefer resident-posted video tours (34.8%) and resident-documented maintenance issues (32%) over professionally produced management content.** This preference is driving a significant credibility shift, with 42% of renters reporting that they trust video reviews more than written reviews on listing sites because video feels harder to fake.

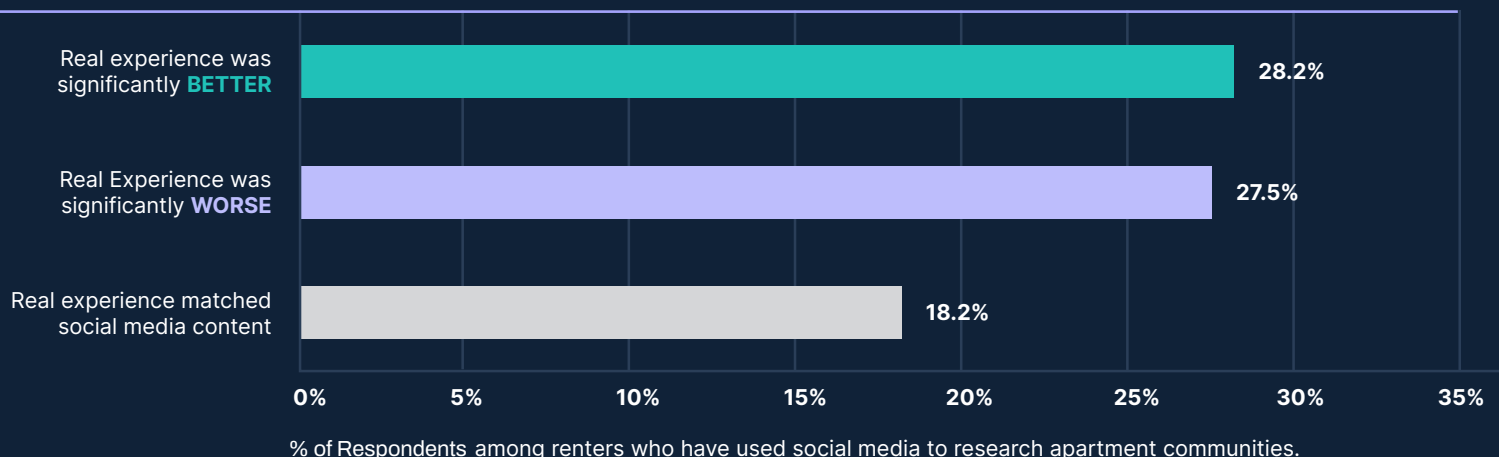
Social Platforms Renters Use to Research Apartment Communities



THE REALITY GAP: A DOUBLE-EDGED SWORD

Despite its popularity, social media remains a highly volatile research channel. When comparing digital content to physical reality, 28.2% of renters found the actual community significantly better than social media suggested, while 27.5% found it significantly worse, leaving only 18.2% who felt the online portrayal was accurate.

The Social Media Reality Gap: How Often the Experience Matched Expectations



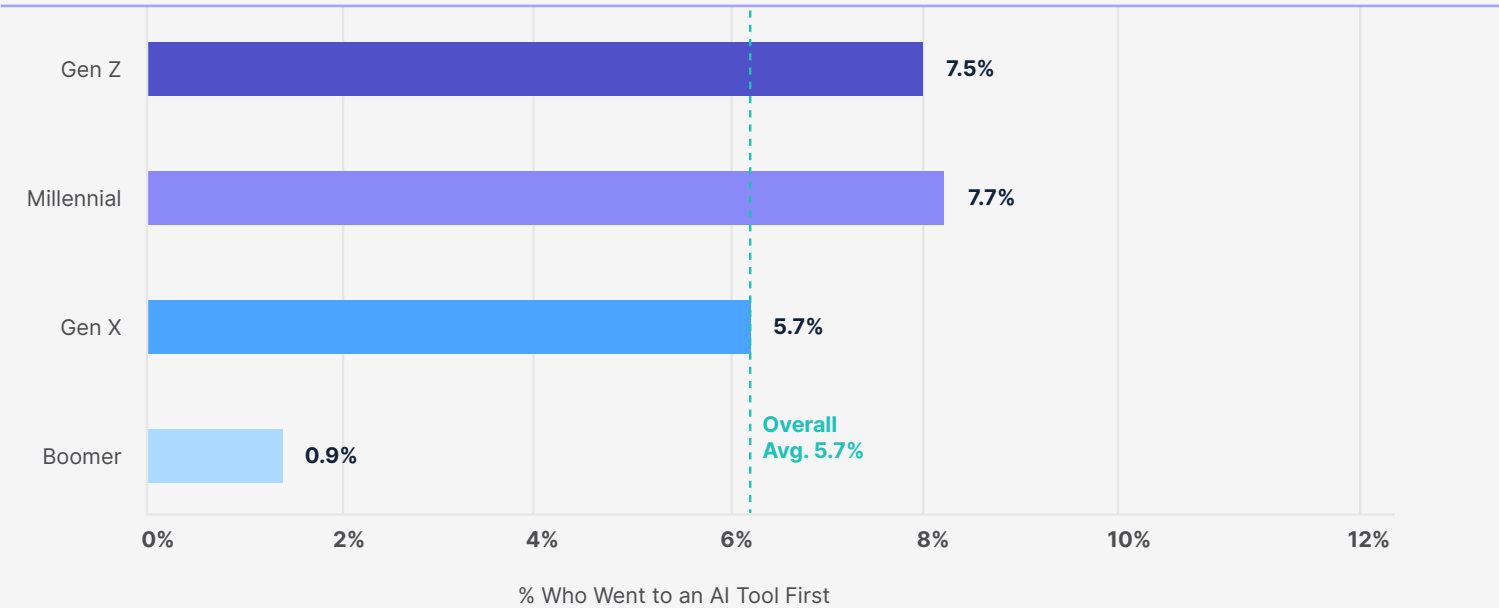
This perfect symmetry indicates that social media is neither systematically optimistic nor inherently negative; it is simply inaccurate in both directions. **For operators, this means heavily curated corporate content often creates expectations the physical property**

fails to meet, while harsh resident videos can send prospects through the door expecting the worst. Gen Z experiences this dissonance most acutely, representing both the most active social researchers and the cohort most likely to feel misled. Ultimately, social media has become a mainstream channel defined by deep renter skepticism, pushing prospects to seek out even more advanced tools to verify what they see.

THE AI VANGUARD: A NEW TOP OF FUNNEL

This heightened skepticism and need for rapid verification has birthed a completely new entry point at the very top of the funnel. For the first time in our research, 5.7% of renters report that an AI tool like ChatGPT, Gemini, or Perplexity was the absolute first place they went when beginning their apartment search. In other words, they are going straight to technology that does the research and decision making for them, bypassing listing sites, search engines, and personal recommendations entirely.

AI Tools as First Search Destination: By Generation



While 5.7% may appear modest compared to established platforms, it mirrors the exact initial trajectory of our social media research from just a year ago.

This behavior is highly concentrated among the cohorts most actively searching today, with Gen Z and Millennials utilizing AI-first searches at a rate of roughly 7.6%. These early adopters are not a random sample; they represent the leading edge of the active renter population. **The arrival of AI at the top of the entry system is the defining thread of this year’s data,** fundamentally altering how renters ask questions, process reputation, and make leasing decisions before a property is even aware they are looking. The implication is significant: **marketing dollars and review-push campaigns cannot overcome a property being discouraged by AI before a prospective renter ever reaches the traditional search methods. And AI’s influence does not end there — it is increasingly present throughout the search journey, shaping how renters evaluate, compare, and ultimately decide among properties.**

The AI Compass: Rewriting the Reputation Economy

For a decade, multifamily reputation relied on a stable formula: prospects read reviews, checked star ratings, and decided to tour. Today, that logic is fundamentally incomplete.

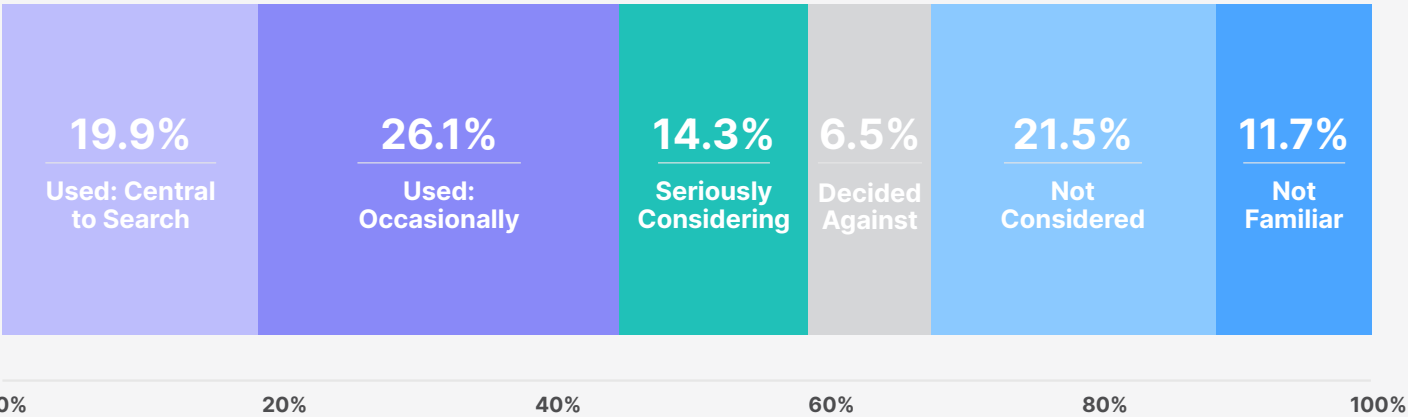
A third layer of interpretation has emerged: AI tools are now summarizing and judging apartment reputations, and renters are listening. This technology can undermine a stellar rating in seconds or rehabilitate a mediocre one just as fast. The industry must accept a new reality: the star rating is no longer the final word.

CROSSING THE ADOPTION THRESHOLD

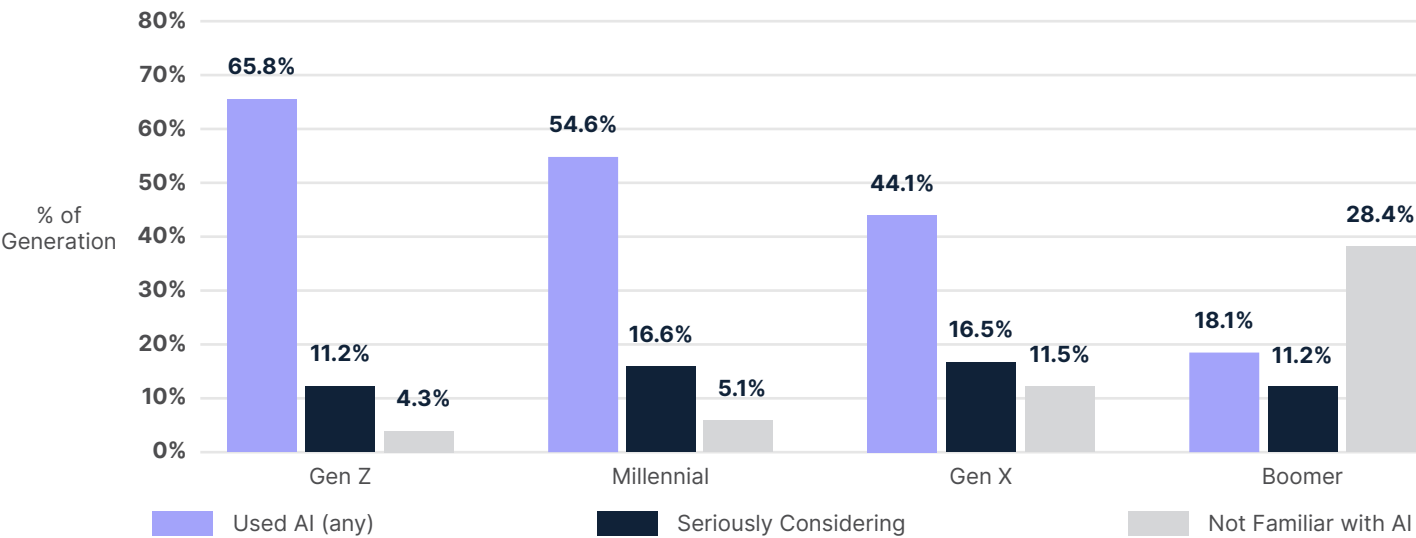
AI adoption has crossed a critical threshold that operators can no longer ignore. Currently, 45.9% of renters actively use AI tools for apartment searching or review analysis, with another 14.3% seriously considering it. **Unsurprisingly, the generations driving the active rental market are leading this shift, with 65.8% of Gen Z and 54.6% of Millennials relying on AI.**

AI Tool Adoption for Apartment Searching: Overall and by Generation

AI Tool Adoption (All Renters)



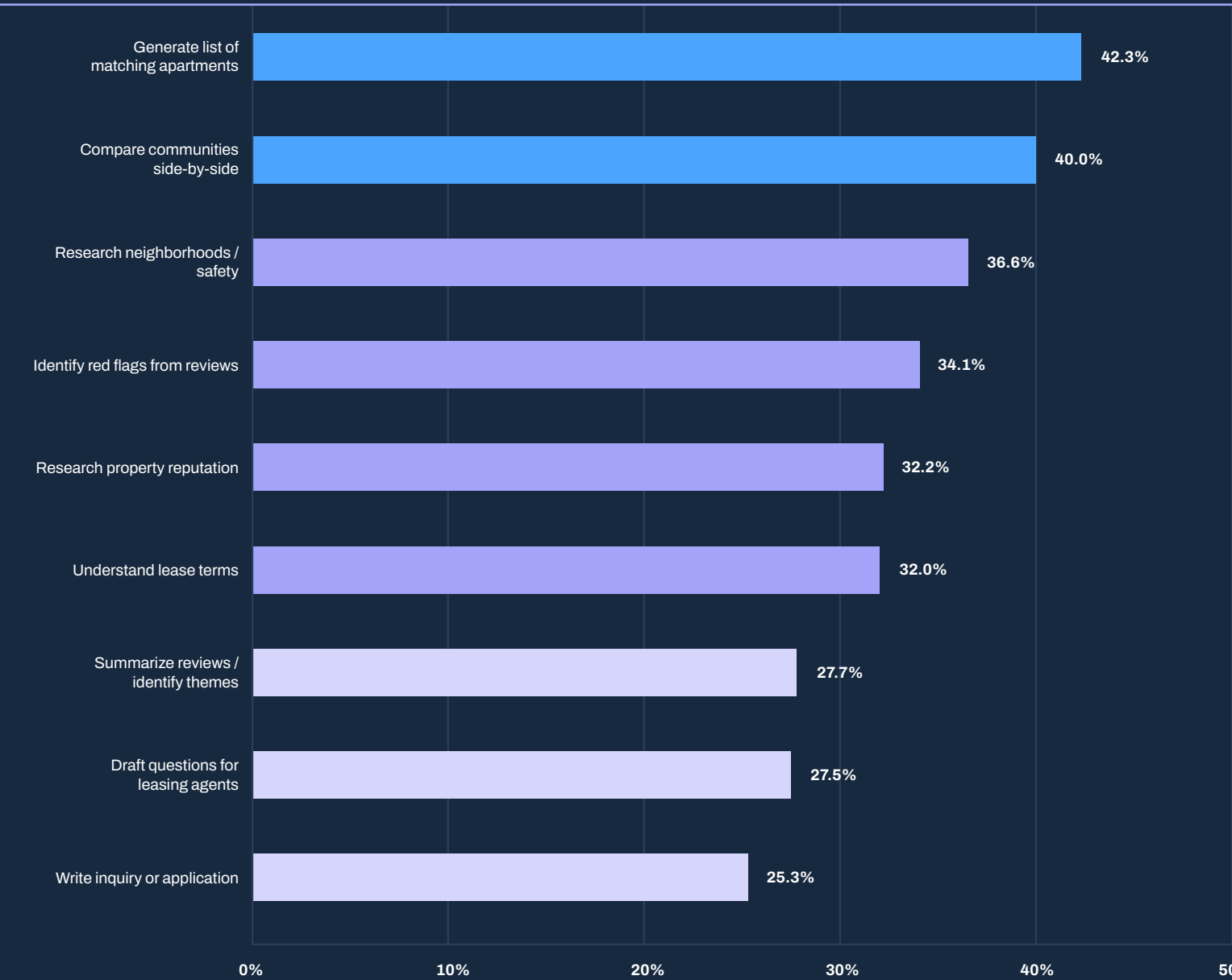
AI Adoption by Generation



Rather than simply using AI as a review-reading shortcut (27.7%), prospects treat these platforms as comprehensive search assistants to generate matching lists (42.3%), compare communities side-by-side (40%), and hunt for red flags (34.1%).

While ChatGPT and Gemini dominate direct usage, Google’s AI Overview is passively exposing massive swaths of the renter population to AI-generated reputation summaries right at the top of their search results, whether they specifically asked for them or not.

What AI Tools Are Used For During an Apartment Search

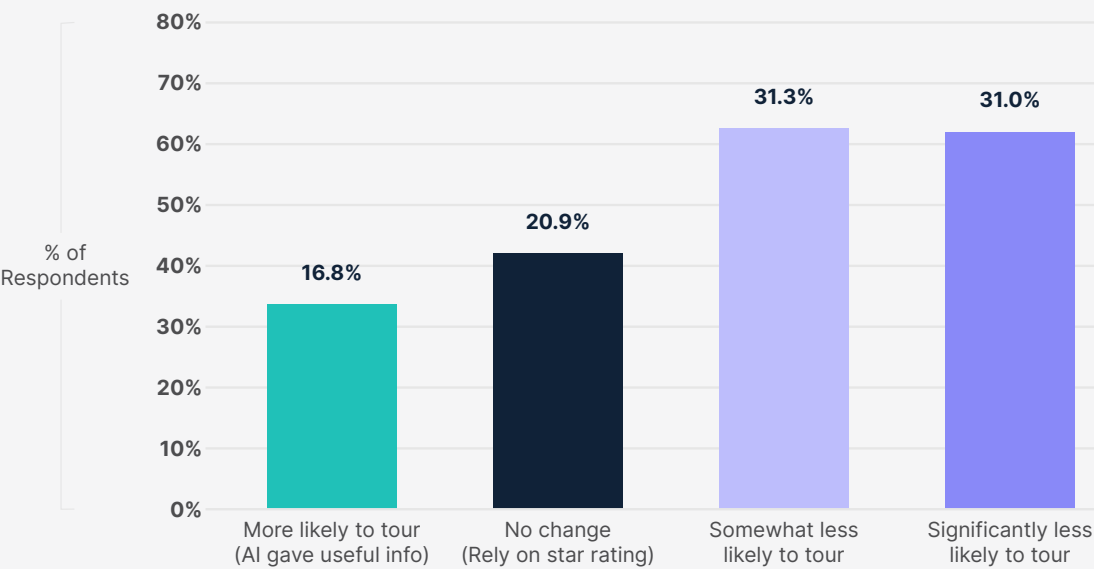


WHEN AI BEATS THE STARS

What happens when an AI summary contradicts a strong star rating? The AI wins. When presented with a 4.7-star property where an AI summary highlights recurring pest and maintenance complaints, 62.3% of renters become less likely to tour.

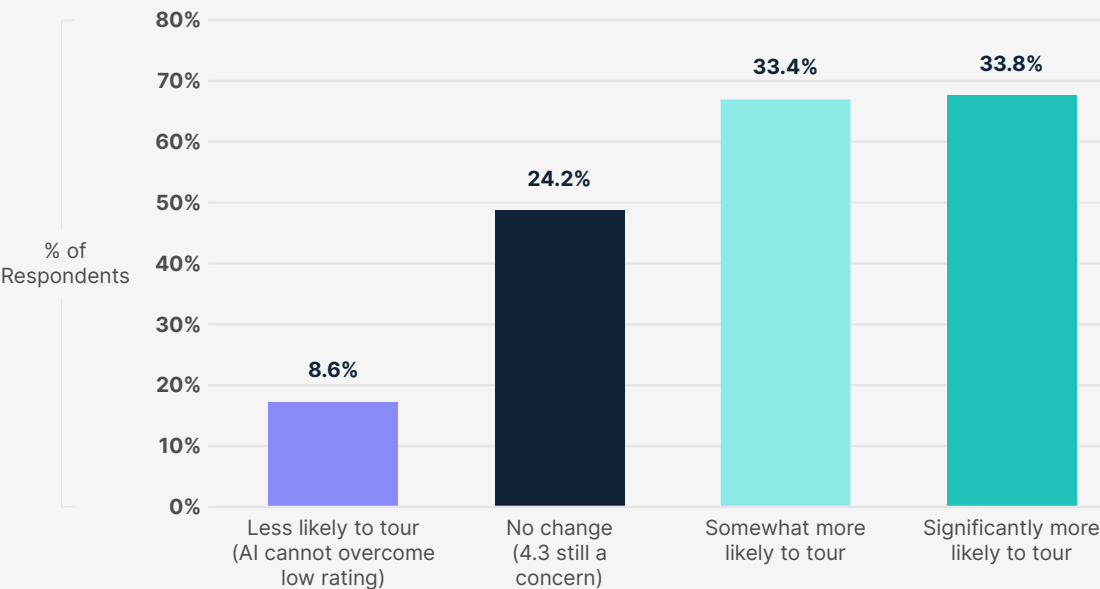
Strikingly, this is not a generational quirk; Boomers are actually the most likely to walk away (65.1%). While a high star average communicates a generally positive consensus, it buries the severity of minority experiences. AI instantly surfaces these specific, actionable warnings, and renters respond accordingly. The star rating is a qualification point for further consideration; the AI summary incites action.

The AI Override Effect: How AI Summaries Move Renters Past the Star Rating



4.7-Star Property. AI Flags Pest & Slow Maintenance

62.3% say they are less likely to tour despite a strong 4.7-star average



4.3-Star Property. AI Gives Positive Summary

67.2% say they are more likely to tour despite a good, but not outstanding 4.3-star rating

THE REHABILITATION EFFECT: RESCUING SUPPRESSED RATINGS

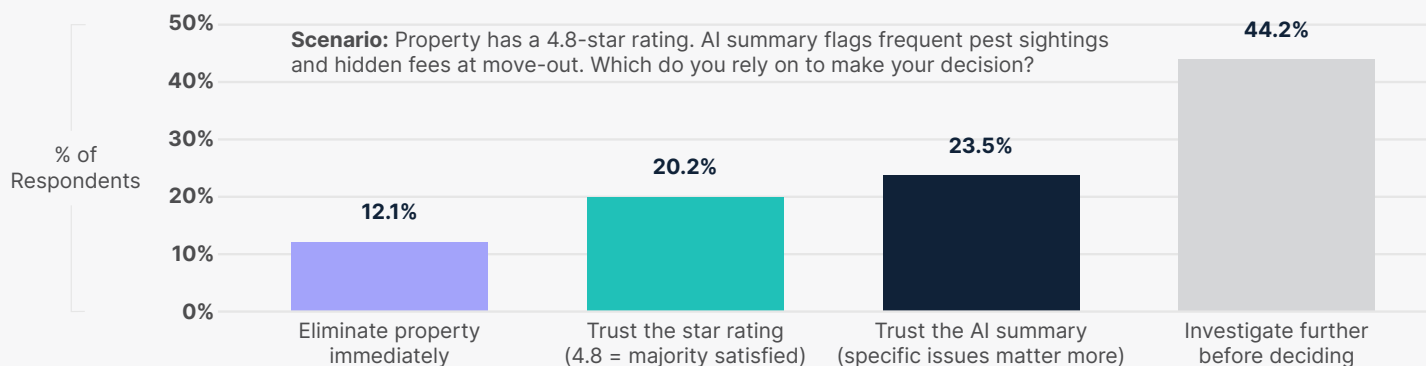
Fortunately, this dynamic works in both directions. If a property sits below the typical prospect threshold at 4.3-stars, but an AI tool reads the reviews and reports that the staff is friendly and maintenance is fast, 67.3% of renters say they are more likely to tour. Millennials, the largest actively searching cohort, are the most responsive to this rehabilitation effect (72.9%). For operators, the takeaway should be obvious: if the underlying operational reality is strong, AI can rescue a star rating that was suppressed by historic negative reviews or insufficient volume. **A good, but not great star rating is no longer a death sentence. 67.3% of renters are more likely to tour a below-average property if an AI summary uncovers a strong operational reality.**

TRUST, CALIBRATION, AND THE DEATH OF THE 4.8-STAR

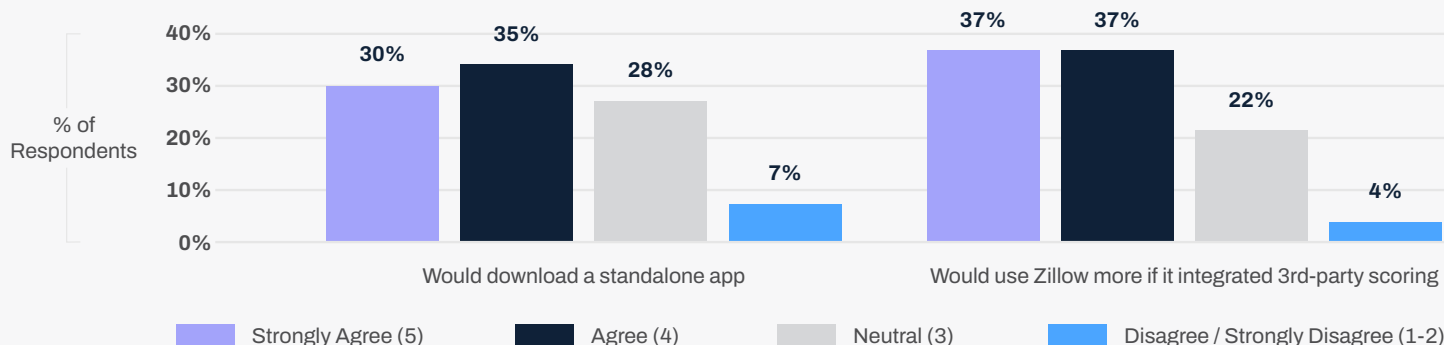
Renters are still calibrating their trust in AI, but they are adapting fast. Nearly 40% of prospects trust an AI summary just as much as reading the reviews themselves, while 22.4% actually trust the AI more because it processes vast amounts of information instantly.

Put to the ultimate test: a pristine 4.8-star rating contradicted by an AI warning about hidden fees only convinces one in five (20.2%). The vast majority will investigate further or eliminate the property entirely. This massive crisis of trust is driving an appetite for formalized reputation intelligence, with 74.5% of renters expressing a desire for a “CarFax-style” third-party resident satisfaction score integrated directly into listing sites like Zillow.

When a 4.8-Star Rating and an AI Summary Conflict: Which Wins?



Appetite for Unbiased Third-Party Resident Scoring (The “CarFax for Apartments” Concept)

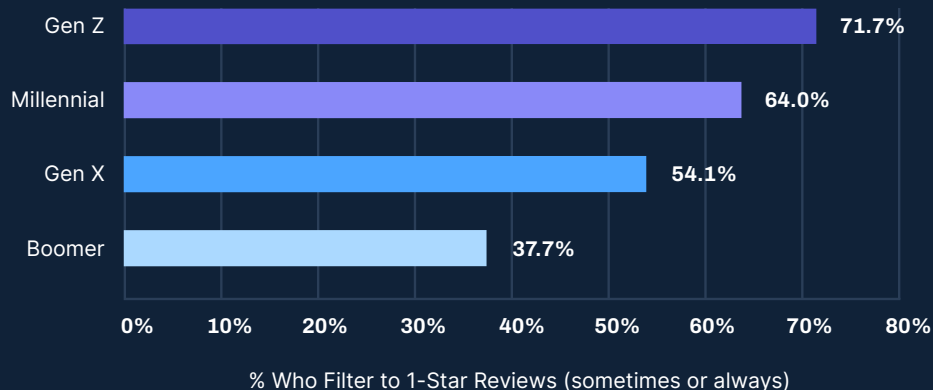


ADVERSARIAL INVESTIGATORS ARMED WITH BETTER TOOLS

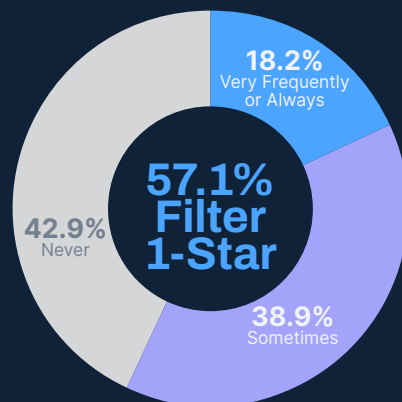
AI did not create this skepticism; it merely armed it. Prospects are inherently adversarial researchers. Over 57% of renters — including nearly 72% of Gen Z — routinely bypass positive feedback to filter directly to 1-star reviews.

Renters Actively Seek Out the Worst: 1-Star Review Filtering Behavior

1-Star Filtering by Generation



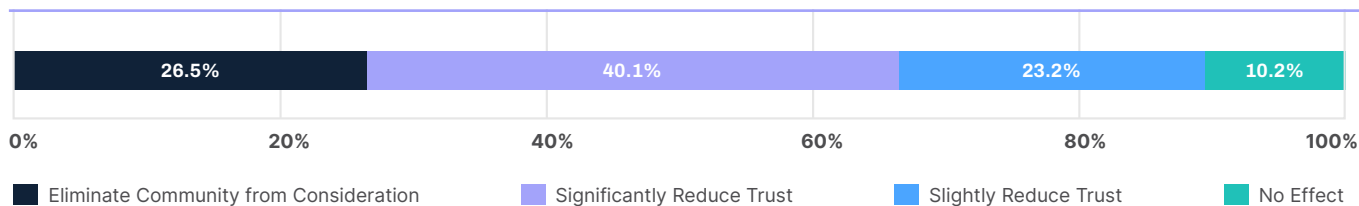
Do Renters Filter Straight to 1-Star Reviews?



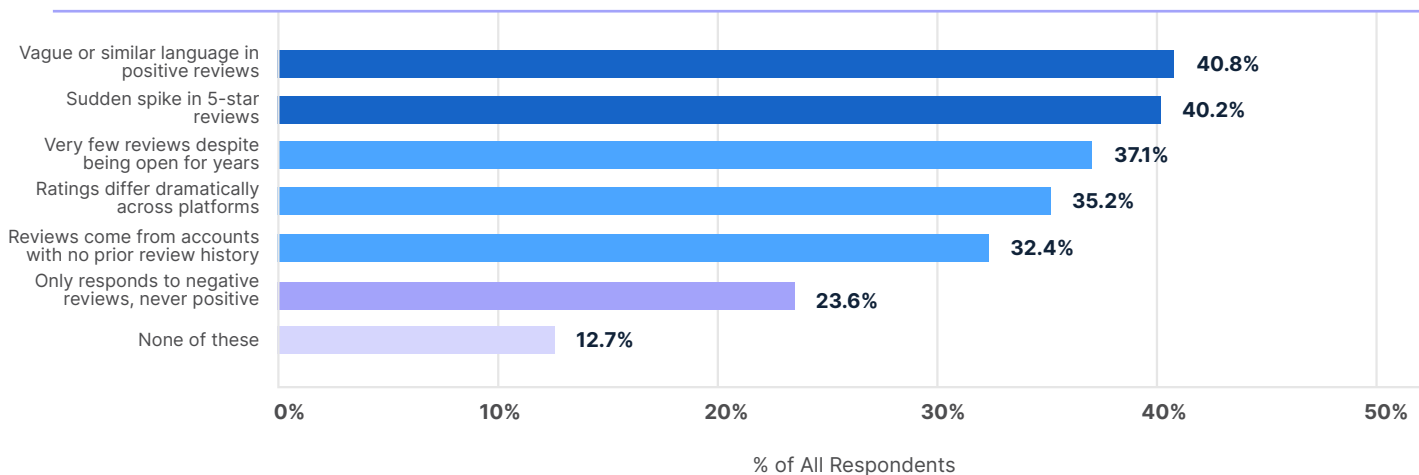
They are actively hunting for red flags, losing trust immediately when they spot vague language (40.8%), sudden spikes in 5-star ratings (40.2%), or accounts with only a single review (32.4%). Furthermore, discovering that a property incentivizes reviews with gift cards will cause 66.6% of prospects to greatly lose trust in or eliminate the community altogether.

AI is simply giving renters a faster, more comprehensive instrument to conduct the rigorous investigations they were already performing by hand.

Effect of Incentivizing Reviews on Prospect Decision Making



Signals That Make Renters Distrust a Community's Review Profile



Here Be Dragons

If the previous section detailed how renters investigate properties, this section reveals what they find that instantly ends the conversation. The “Veto Effect” is the phenomenon where a handful of specific negative reviews can eliminate a community from consideration entirely, regardless of a stellar overall star rating. In the past, finding these deal-breakers required diligent digging.

Today, armed with AI summarization and adversarial search tactics, renters uncover Veto-triggering content automatically.

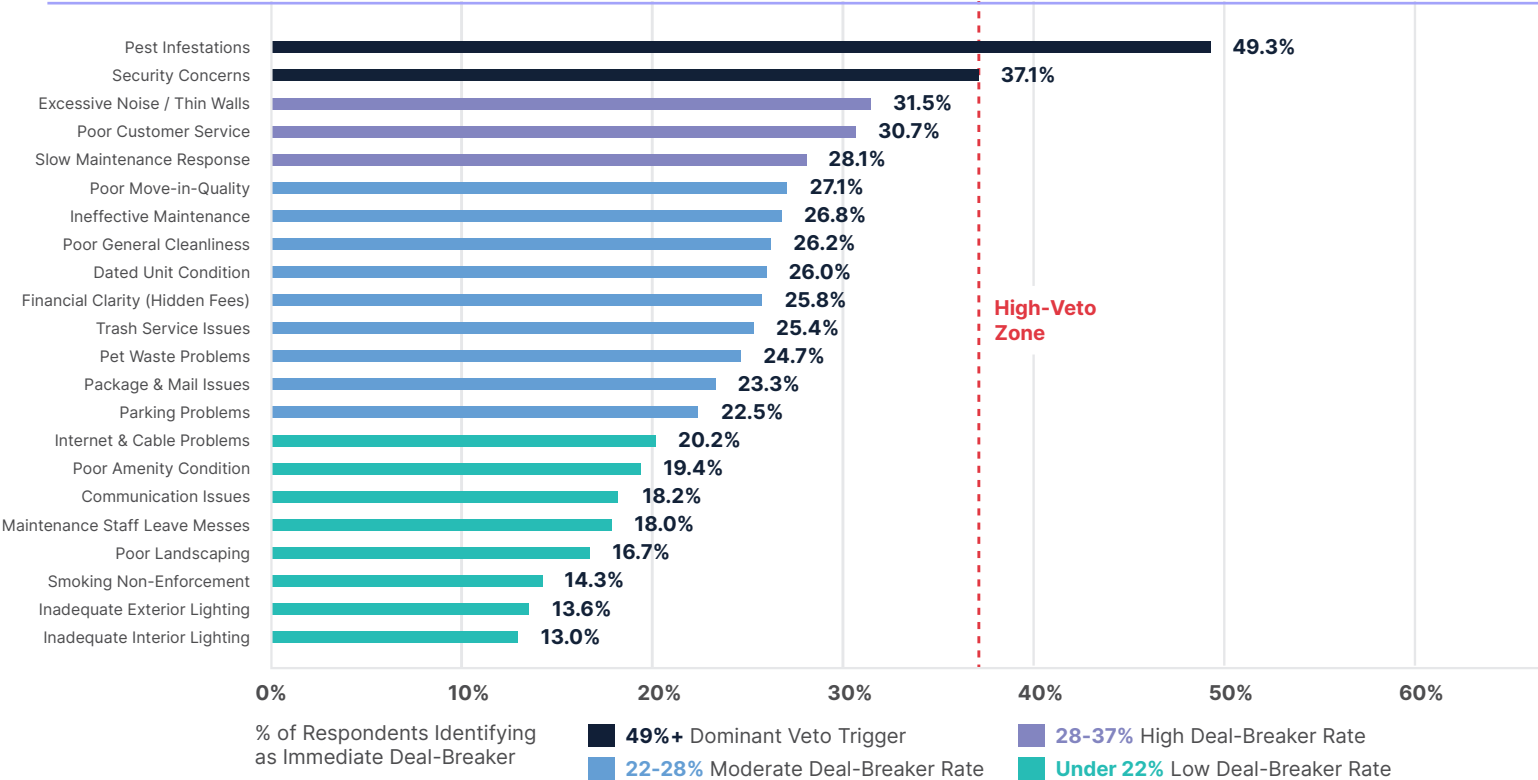


THE ULTIMATE VETO

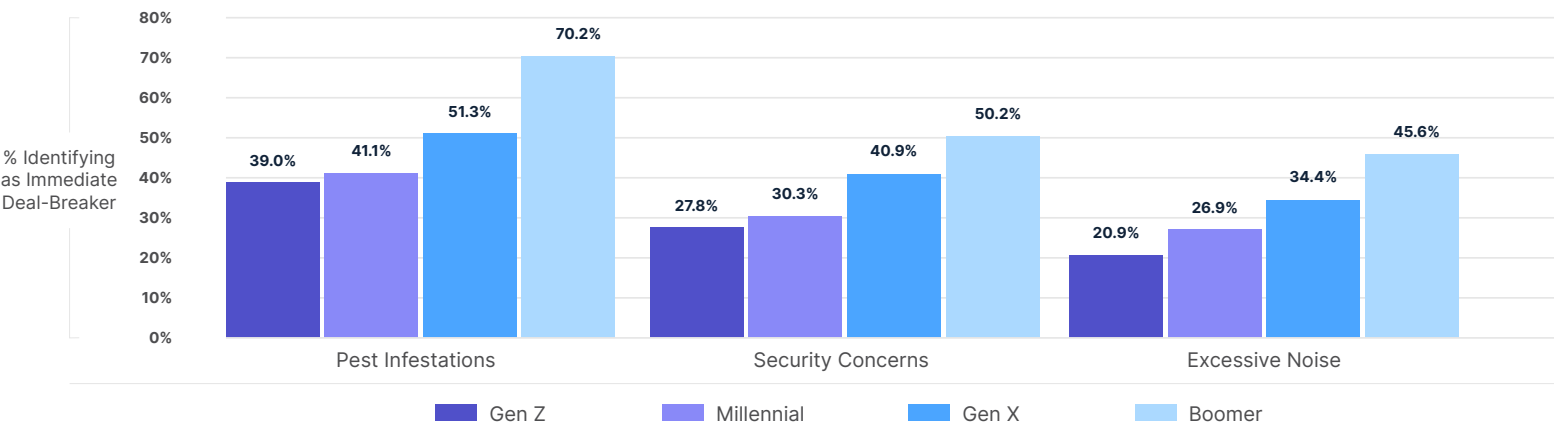
Every year, pest infestations dominate the list of unforgivable offenses, and 2026 is no exception. Nearly half of all renters (49.3%) identify pests as an immediate deal-breaker, outpacing security concerns by 12.2 points and financial clarity by nearly double.

This Veto Effect intensifies sharply with age. While 39% of Gen Z renters will walk away from a pest mention, a staggering 70.2% of Boomers, the industry’s highest-retention demographic, will instantly eliminate a property based on pest reviews alone. Once this trigger appears, stellar ratings lose their power; a perfect 5.0-star average is enough to prompt reconsideration for only 11.5% of prospects.

Which Issues Are Immediate Deal-Breakers When Found in Online Reviews?



Top Deal-Breakers by Generation: The Numbers Grow With Age



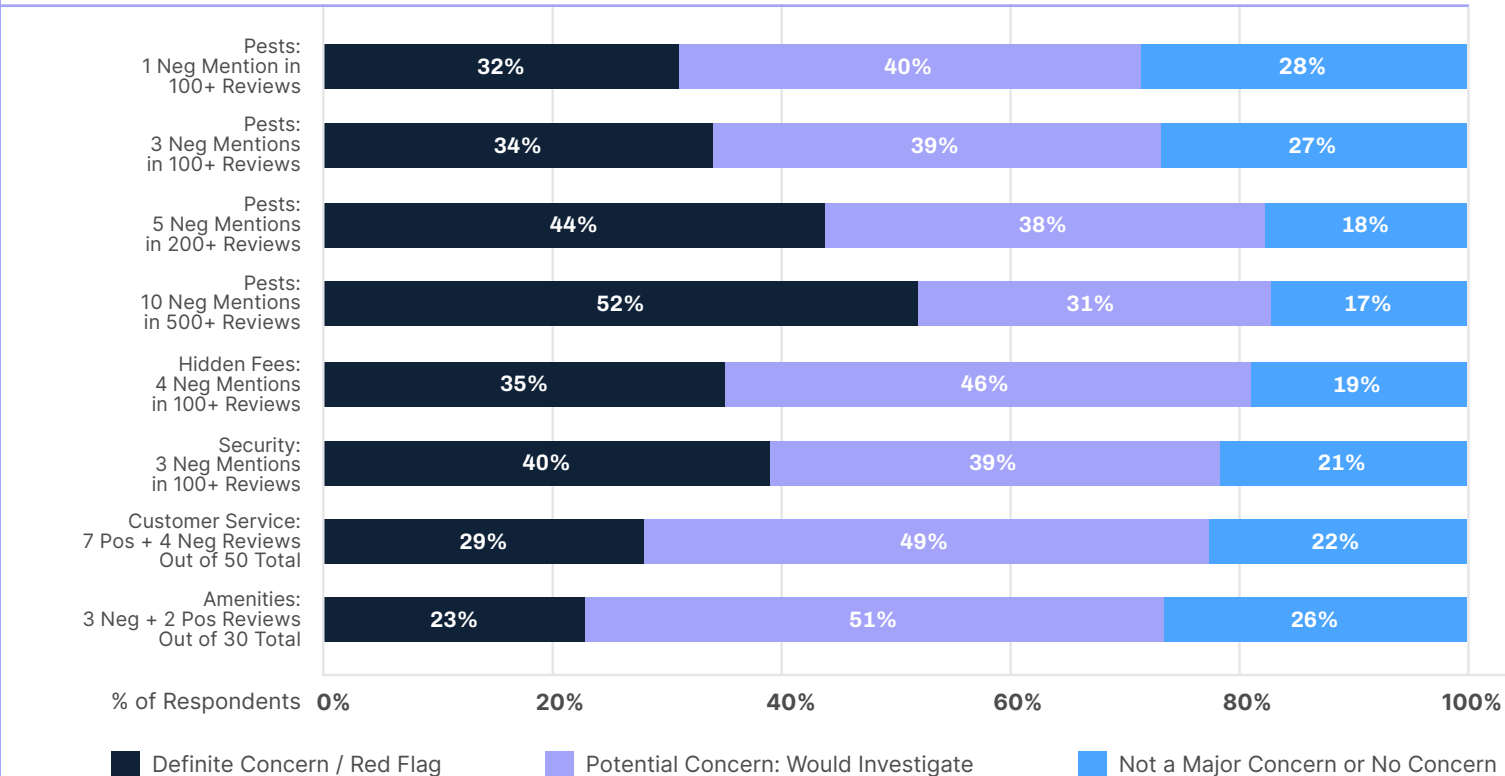
HIDDEN FEES: A STRUCTURAL TRUST CRISIS

While financial clarity ranks lower on the absolute deal-breaker list, the data reveals a massive, structural trust problem regarding hidden fees. Nearly half of all renters (49%) explicitly expect the advertised rent to represent the complete, all-in monthly cost. **When properties exclude mandatory fees for trash, packages, or administration until lease signing, renters view it as a fundamental breach of trust.** This sensitivity is remarkably high: if just four reviews out of a hundred mention surprise move-out charges or hidden fees, 81.2% of prospects register meaningful concern. Boomers are the most sensitive to financial deception (34.9% deal-breaker), but all generations view hidden fees as a major red flag that the review record easily amplifies.

THE VETO MATH: TRACKING THE DILUTION CURVE

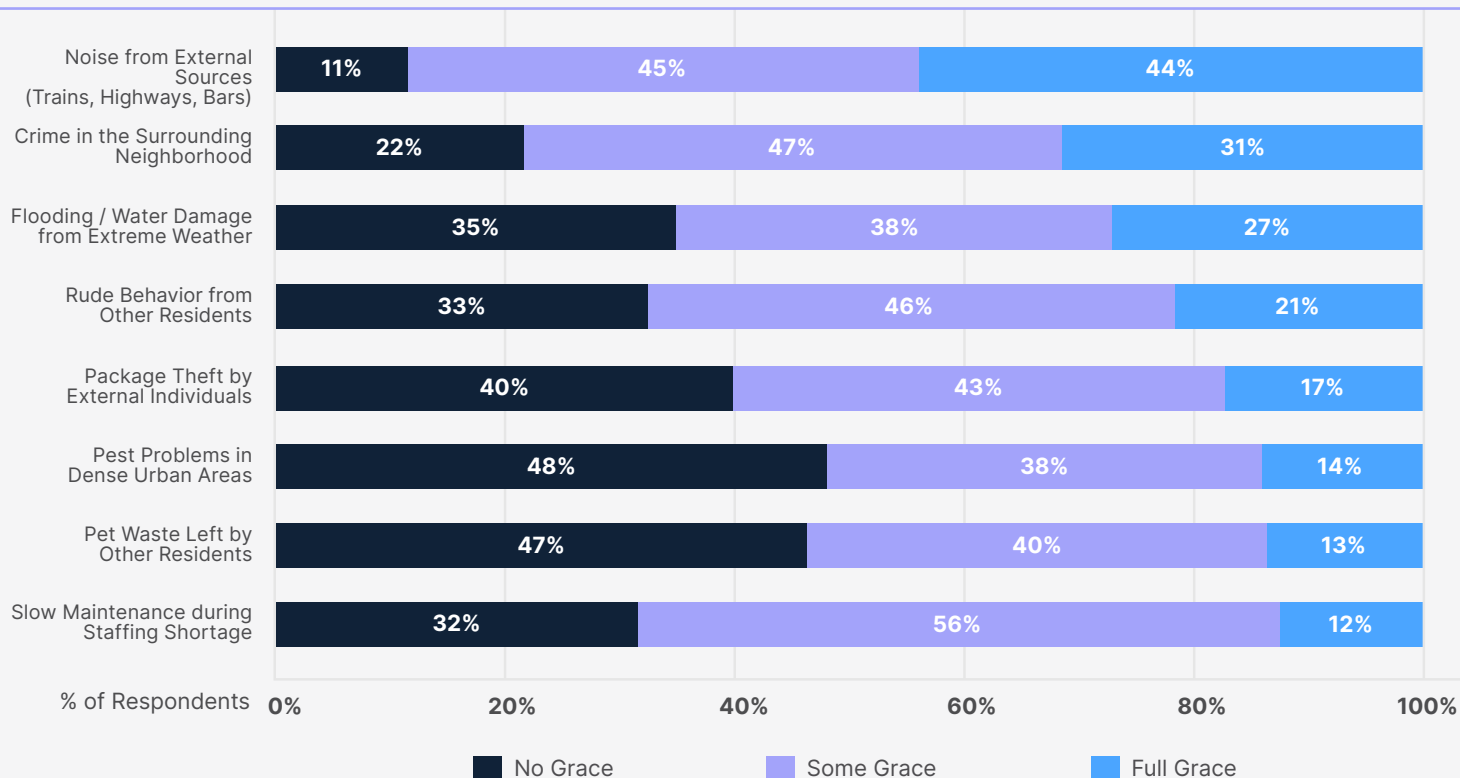
This study does not just identify deal-breakers; it quantifies exactly how much negative feedback is required to trigger a Veto. The “dilution curve” for pests perfectly illustrates this hyper-sensitivity. A single pest mention buried among 100 reviews is enough to trigger concern for over 70% of renters, with 32% labeling it a definite red flag. As the total review volume scales, the perception of risk grows even faster with ten pest mentions among 500 reviews pushing the “definite red flag” category to a 52% majority.

How Many Mentions Does it Take? The Review Threshold Sensitivity Matrix



Conversely, renters are highly forgiving of amenity complaints. Three negative amenity mentions alongside two positive ones in a pool of 30 reviews trigger definite concern for only 23.1% of prospects. **This operational playbook tells something profound: some categories afford management time to correct the narrative, while others offer zero margin for error.**

Grace Has Limits: How Much Understanding Renters Extend To Operations Teams by Issue Type



THE BOUNDARIES OF GRACE

When evaluating complaints, renters do extend grace, but they draw the boundaries precisely. Issues perceived as purely environmental, such as highway noise or neighborhood crime, receive high levels of understanding. However, when an issue breaches the home environment, grace evaporates, even if the root cause is external. Whether operators feel renter expectations for performance in some categories are fair or not, they must find a way to perform in order to remain competitive; operations drive online reputation even more than marketing does.

Management receives almost no grace for pest problems migrating from neighboring buildings, pet waste left by non-compliant residents, or package theft committed by non-residents. **Renters apply a strict, unforgiving logic: if a problem impacts their**

living space, they expect management to solve it regardless of its origin. Even known operational hurdles like staffing shortages only earn "some grace" for slow maintenance, with nearly a third of renters refusing to accept it as an excuse for delayed service.

THE RECOVERY PROTOCOL: MANAGING THE AI LAYER

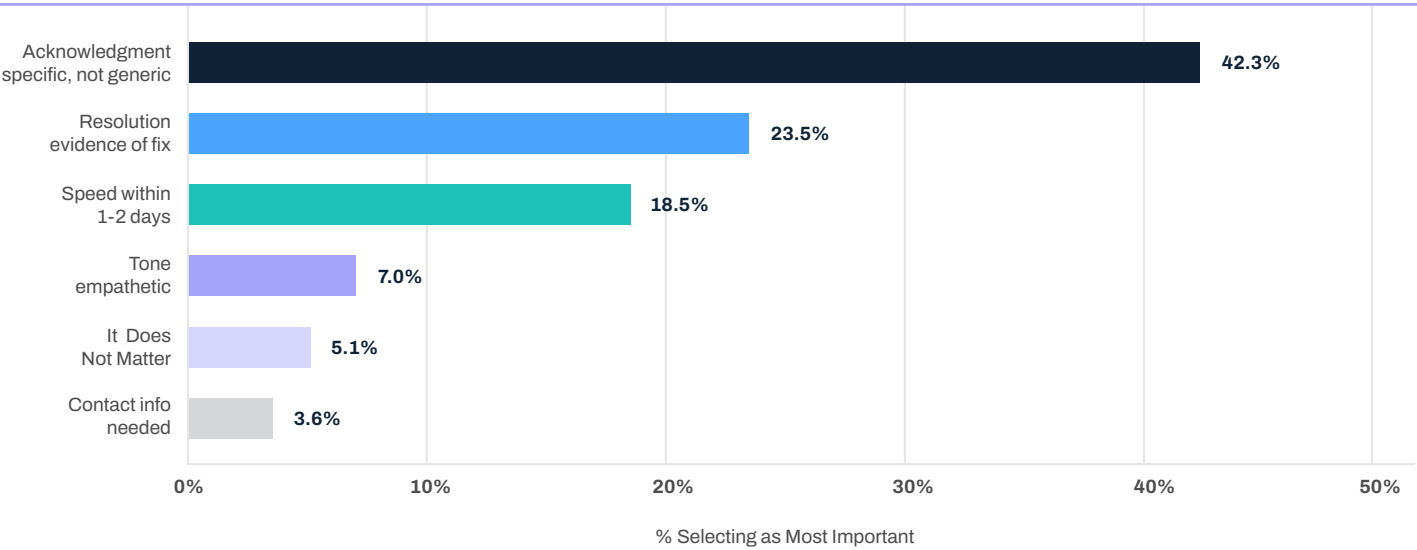
The Veto section would be incomplete without a recovery strategy. When a damaging review is already on the record, a well-executed management response acts as a powerful conversion tool, actively increasing property confidence for 66.4% of renters. **Prospects are not looking for speed or templated apologies;** 42.3% demand specific acknowledgment of the actual complaint, and 23.5% want documented proof of resolution.

A specific, problem-focused reply can shift the narrative for two-thirds of the renters who read it. Renters do not expect flawless communities; they expect responsive ones. In the AI era, these specific management responses operate on the exact same data layer as the reviews themselves.

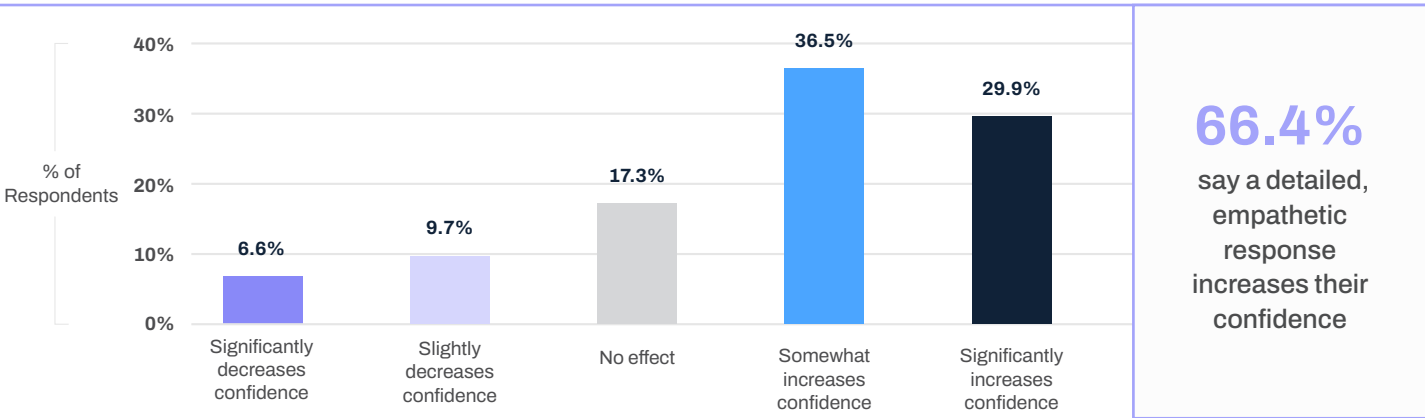
When an AI tool surfaces pest or fee complaints, it also surfaces the detailed resolutions attached to them, allowing a strong management response to serve as a direct, automated intervention before the prospect ever reaches the front door.

The Recovery Opportunity: Management Responses as a Conversion Tool

What Matters Most in a Management Response to a Negative Review



Effect of a Detailed, Empathetic Management Response on Property Perception



Technology as a Tool, Not a Replacement

The first three sections of this report outline a heavily digital journey. Prospects use AI, filter reviews, and verify online reputations before ever speaking to a leasing office. By the time they make contact, a significant portion of their opinion is already formed. However, a crucial counterweight exists: renters want technology to support the leasing experience, not replace the people managing their homes.

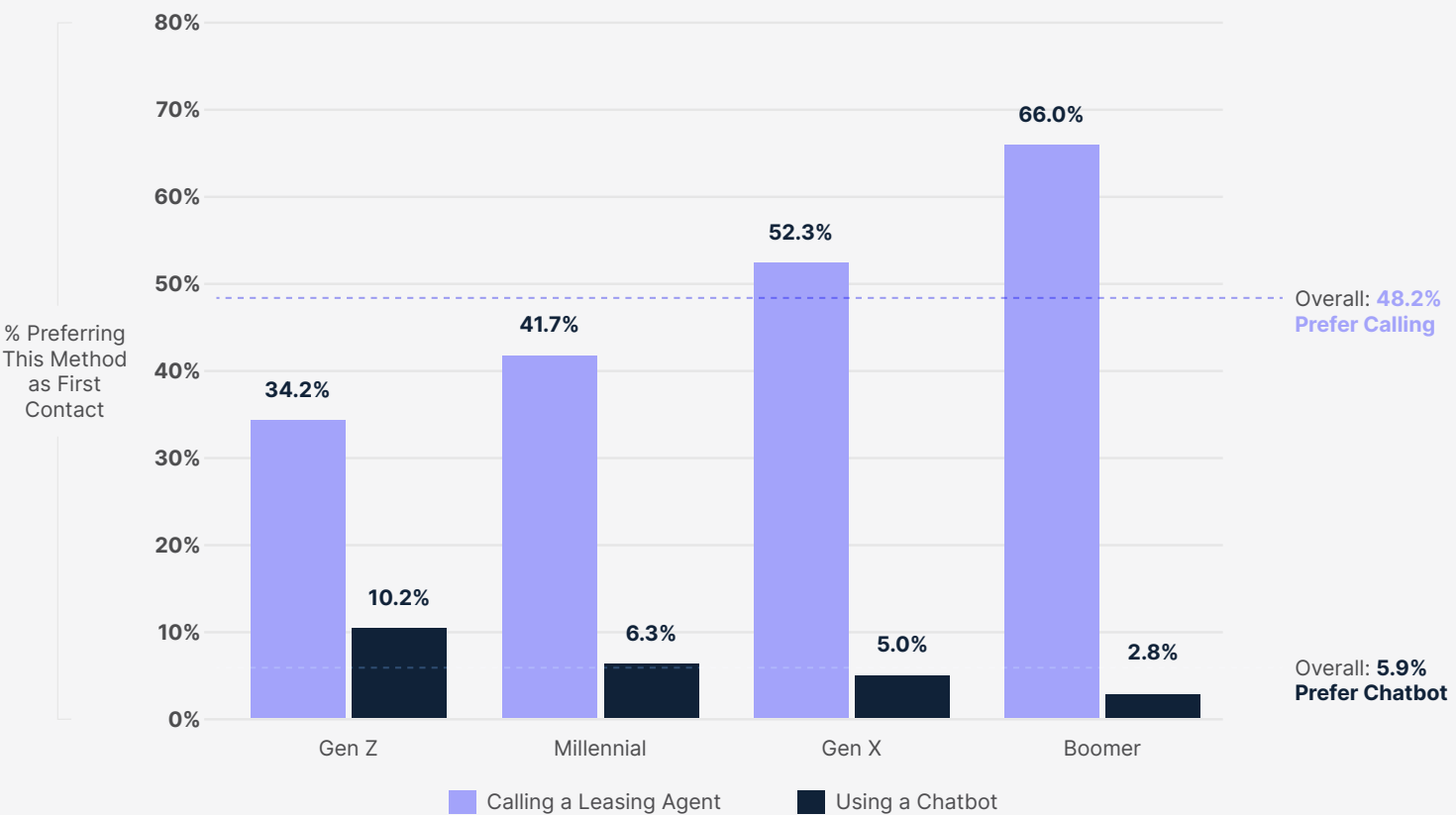
The boundary between automation and human interaction is drawn precisely by task, stakes, and generation. Understanding exactly where that line sits is one of the most operationally vital takeaways of this study.

THE PREFERRED FIRST TOUCH: VOICES OVER BOTS

Despite their digital buildup, when prospects are finally ready to reach out, 48.2% prefer to call and speak directly with a leasing agent. Email (19.3%) and live chat (14.2%) follow, while a mere 5.9% prefer an automated chatbot, fewer than those who would simply drive to the property unannounced. Strikingly, this preference spans

generations. Even among digital-native Gen Z, 34.2% want to call an agent first, while only 10.2% prefer a bot. **Operators who eliminate inbound phone lines, route callers exclusively to AI agents, or centralize phone answering to remote call centers are instantly alienating half of their prospective renter base before a conversation even begins.**

Preferred First Contact Method: Calling vs. Chatbot by Generation

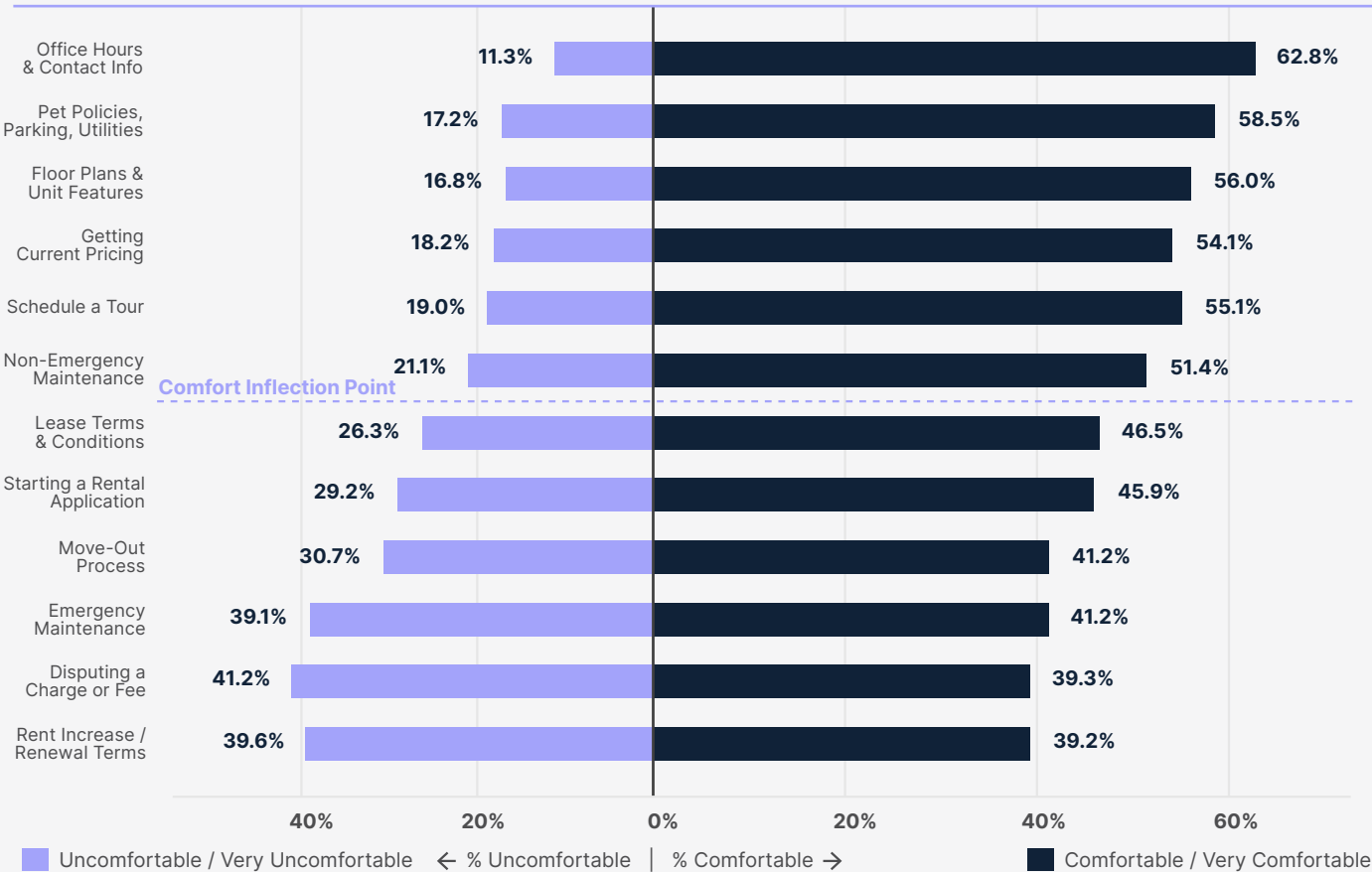


THE AUTOMATION BOUNDARY: MAPPING CHATBOT COMFORT

Renters do not oppose chatbots categorically; rather, their comfort follows a strict gradient dictated by risk.

Prospects are highly comfortable delegating low-stakes informational tasks to automated systems. They are happy to let a bot confirm office hours (62.8%), explain pet policies (58.5%), detail floor plans (56%), or schedule a tour (55.1%). **Because the consequences of a wrong answer are low, the efficiency of AI is welcomed.**

The Chatbot Comfort Gradient: Where Renter Tolerance Ends



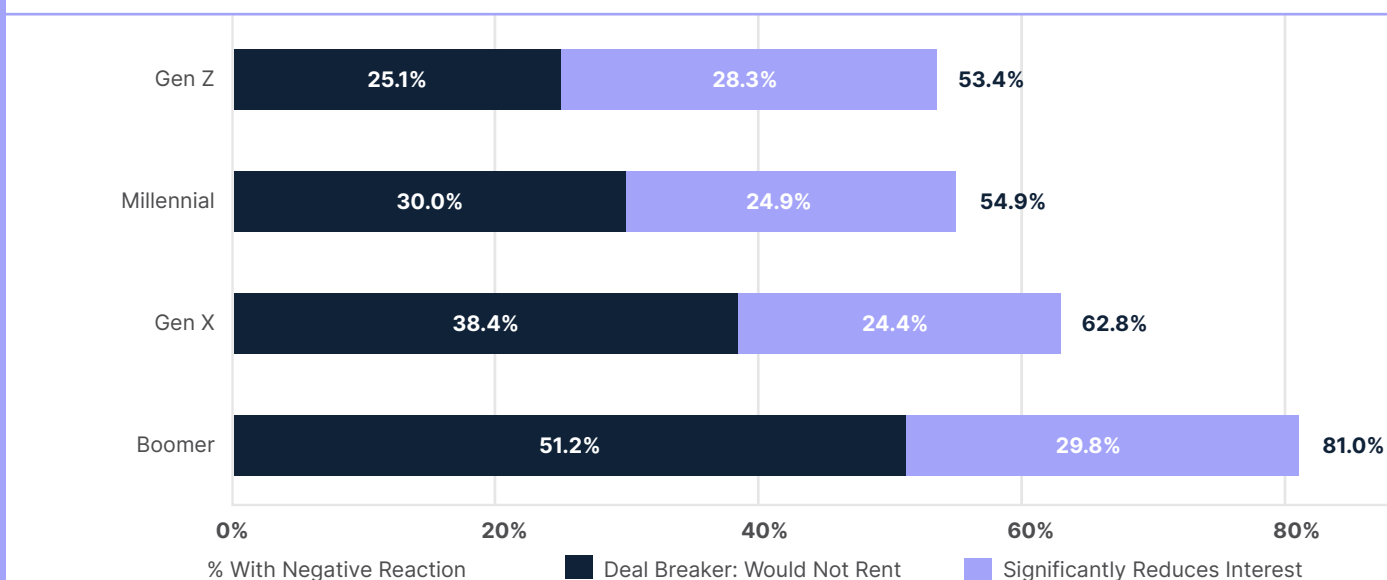
As financial and legal stakes rise, however, comfort begins to slide. Starting a rental application or submitting non-emergency maintenance requests still hold majority approval, but the floor drops out entirely for complex issues. When dealing with emergency maintenance, charge disputes, rent renewals, or the move-out process, comfort levels invert, becoming minority positions. Ultimately, 81.8% of renters demand a human for complex situations, while only 3.5% actually prefer an AI agent. **The operational map is clear: deploy AI for basic logistics, but keep it far away from billing disputes and urgent maintenance.**

THE REJECTION OF FULLY CENTRALIZED AI MANAGEMENT

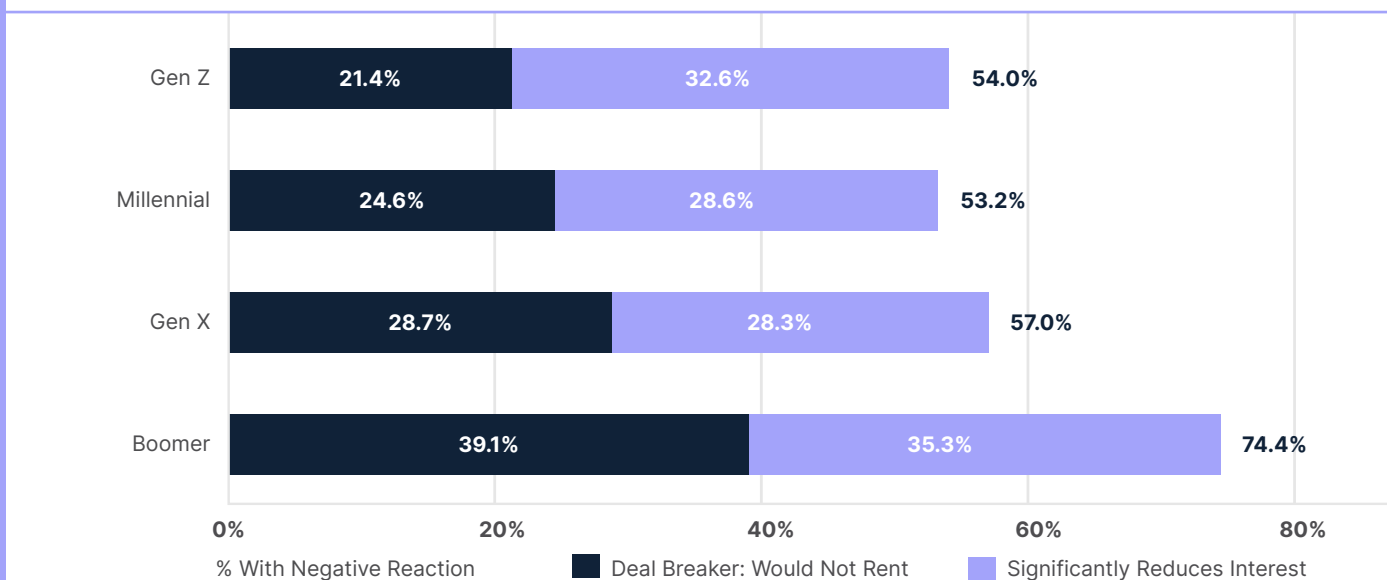
Pushing automation past this boundary triggers outright rejection. When tested on deployment models featuring fully AI-powered leasing agents or entirely centralized management with no onsite staff, the reactions were overwhelmingly negative across the board. A fully AI-staffed community is a deal-breaker or significant deterrent for 62% of all renters, spiking to nearly 81% among Boomers. Centralized management fares no better, drawing a 58.4% negative reaction overall. Even Gen Z, the most tech-fluent cohort, rejects these models.

Renter Opposition to Full AI and Fully Centralized Management: By Generation

Fully AI Leasing Agent (No Human Staff During Business Hours)



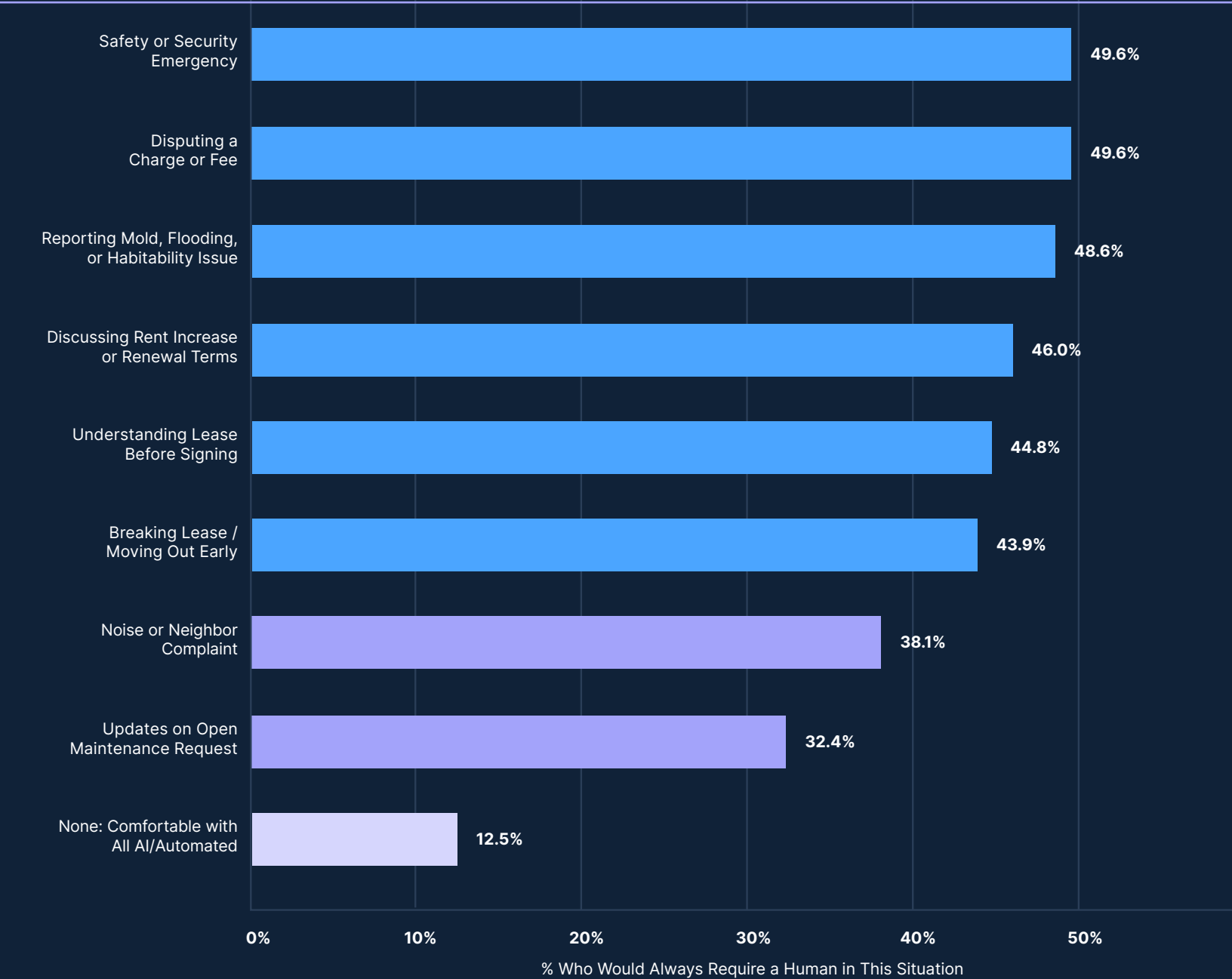
Fully AI Centralized Management (No Onsite Office or Staff)



Renters unequivocally demand a human presence for safety emergencies, billing disputes, serious habitability issues like mold or flooding, and lease negotiations.

The cost of failing to provide this access is severe. If a renter contacts a community with an urgent problem and is routed to an AI agent or remote call center, 60.9% report extreme frustration. **For over a third of residents, that single routing failure is enough to trigger a move-out.**

Situations Where Renters Say They Would Always Require a Human — Not AI



THE PHYSICAL TOUR: VERIFICATION

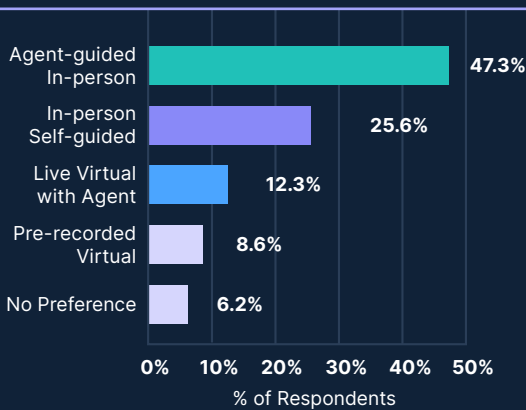
The digital search ultimately funnels into the physical tour, which remains the highest-stakes single moment in the leasing process. Nearly half of all renters (47.3%) still prefer an agent-guided, in-person tour, while 21% bypass physical tours entirely.

Modern renters arrive at the property not to discover, but to verify. They use the tour to test the hypothesis they built online. Prospects actively check

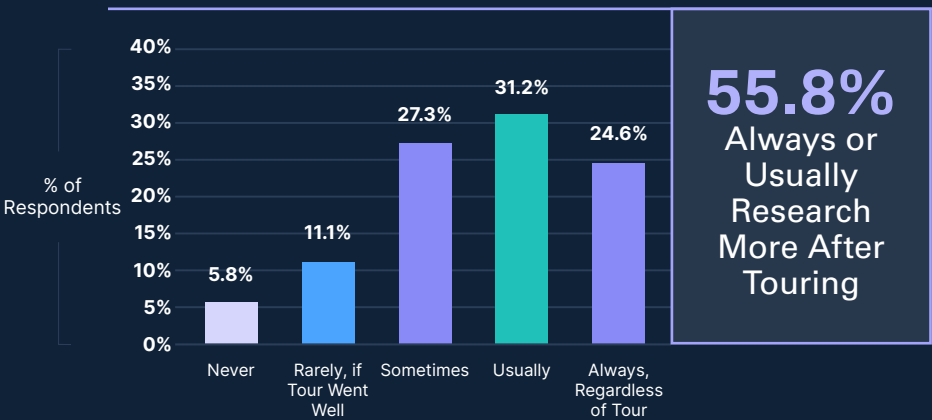
the cleanliness of common areas (53.4%), assess safety (50.8%), verify that units match online photos (48.5%), and hunt for signs of pests (47.9%). The leasing agent plays a massive role in this verification, with 74.7% of renters stating that staff interaction heavily shapes their overall impression, and over a third walking away entirely due to a negative encounter. The scrutiny doesn't end at the exit, either; 55.8% of prospects return to online reviews after touring to test their physical experience against the digital record.

The In-Person Tour: Preferences, Priorities, and the Digital Loop That Follows

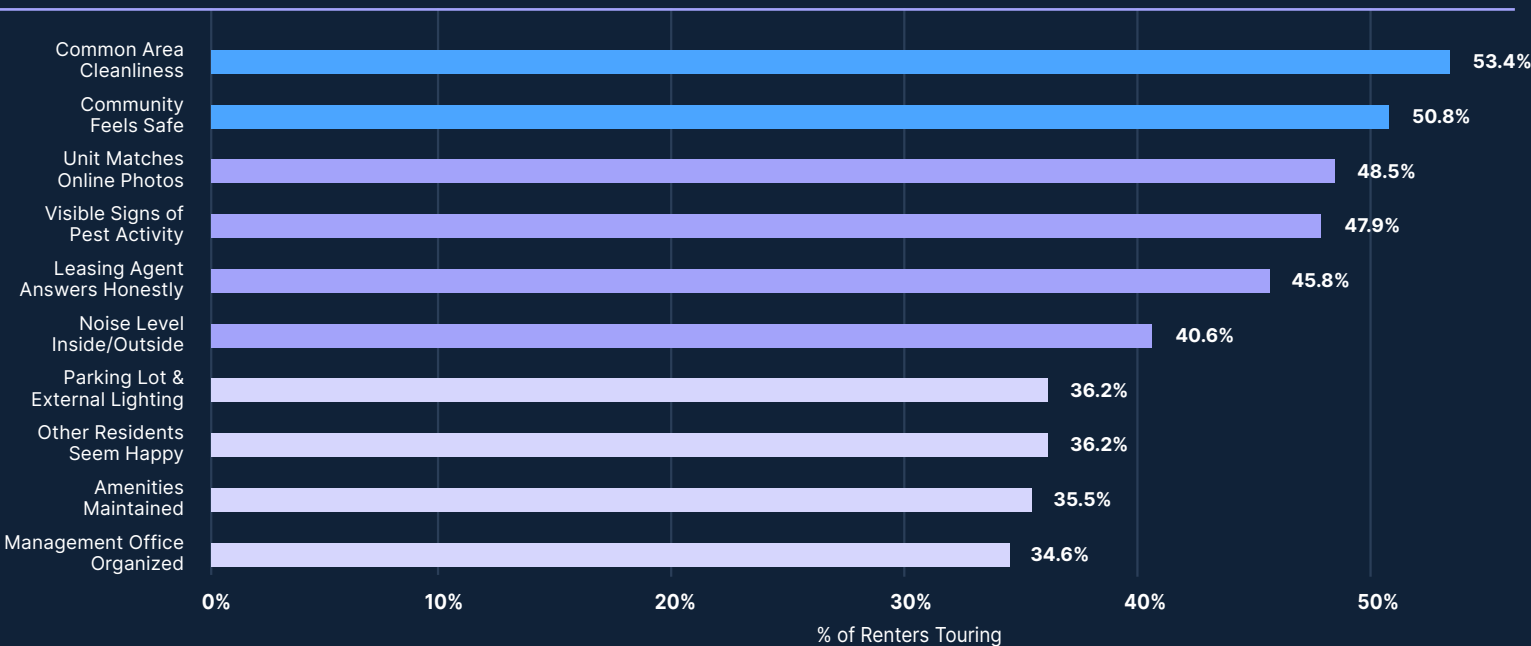
Preferred Tour Type



Post-Tour Online Research Frequency



What Renters Look for During an In-Person Tour



Renters welcome technology into the physical space when it expands their agency, but reject it when it manufactures an illusion. Self-guided tours are broadly embraced, with nearly 70% of renters across all generations responding positively to exploring a vacant unit independently via digital access codes.

In stark contrast, virtual staging is heavily disliked (44.8% negative). Because renters specifically use tours to verify photo accuracy, digitally enhanced images trigger immediate deception alarms. Technology succeeds when it empowers the renter on their own timeline; it backfires when it obscures reality. **Ultimately, operators who deploy technology to amplify the human experience will win, while those who use it to reduce the human presence will pay a measurable cost in both acquisition and retention.**

"Technology succeeds when it empowers the renter on their own timeline; it backfires when it obscures physical reality."



The Long Game

Renewal decisions are not made the moment a lease offer arrives. They are made in the three weeks after a maintenance request goes unacknowledged, in the moment a hidden fee appears on a ledger, and through the slow compounding of every dismissive interaction.

Over half of the respondents in this study (52.8%) are renting by choice, largely driven by financial flexibility (63.4%) and the convenience of having someone else handle repairs (43%). When maintenance fails, it breaches the core promise of the rental lifestyle. Ultimately, the data proves that retention is not a seasonal marketing campaign; it is the accumulated quality of twelve months of operational delivery.

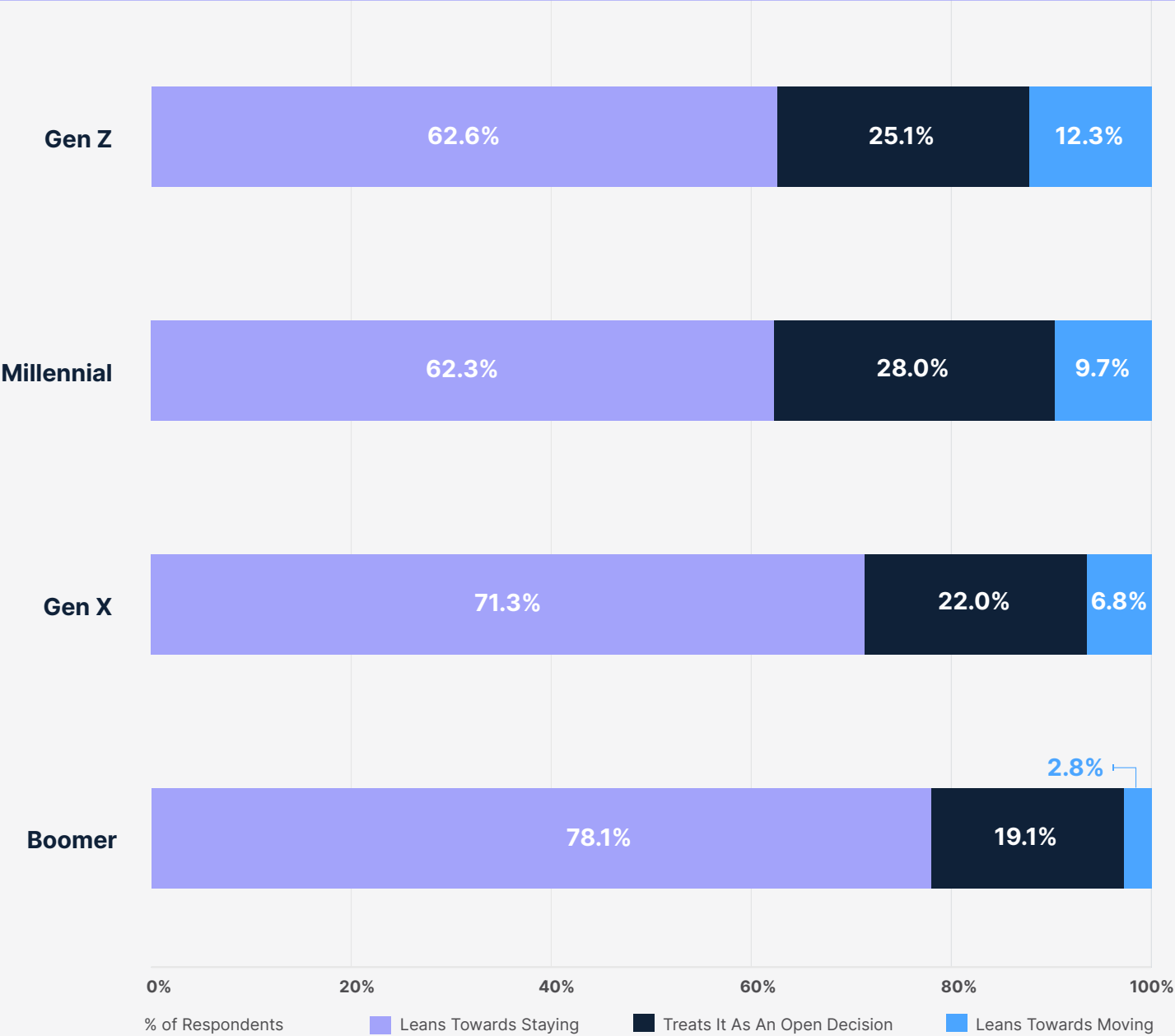


WHO STAYS AND WHO STRAYS

While 67.9% of renters approach their lease expiration with a default instinct to stay, relying on renter inertia is a risky strategy, especially with younger demographics. Boomers (78.1%) and Gen X (71.3%) still exhibit strong default loyalty, seeking a compelling reason to leave rather than a reason to stay.

However, Gen Z approaches renewals with a vastly different posture. Only 62.6% lean toward staying, and 12.3% actively lean toward moving (the highest of any generation). The youngest renters are highly mobile, constantly scanning the market, and evaluating their current community against alternatives. **A retention playbook built on the assumed loyalty of older generations will severely underperform with a Gen Z renter pool that treats every renewal as an open competition.**

Renewal Instinct by Generation: Default Position When Lease Approaches

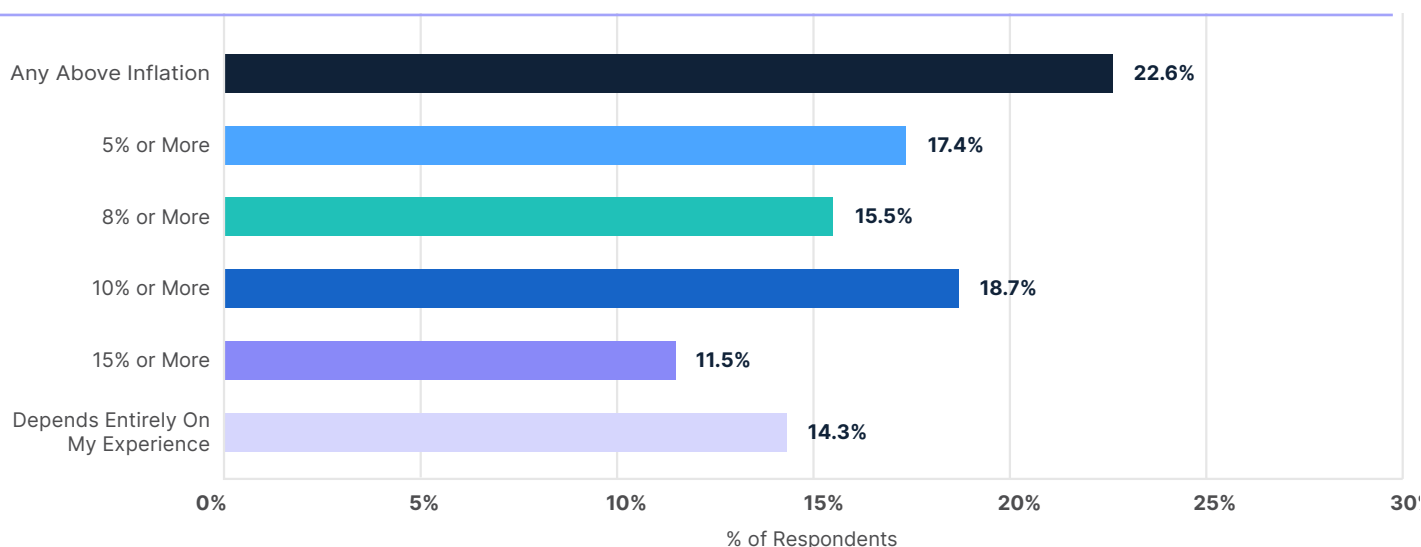


THE BREAKING POINT

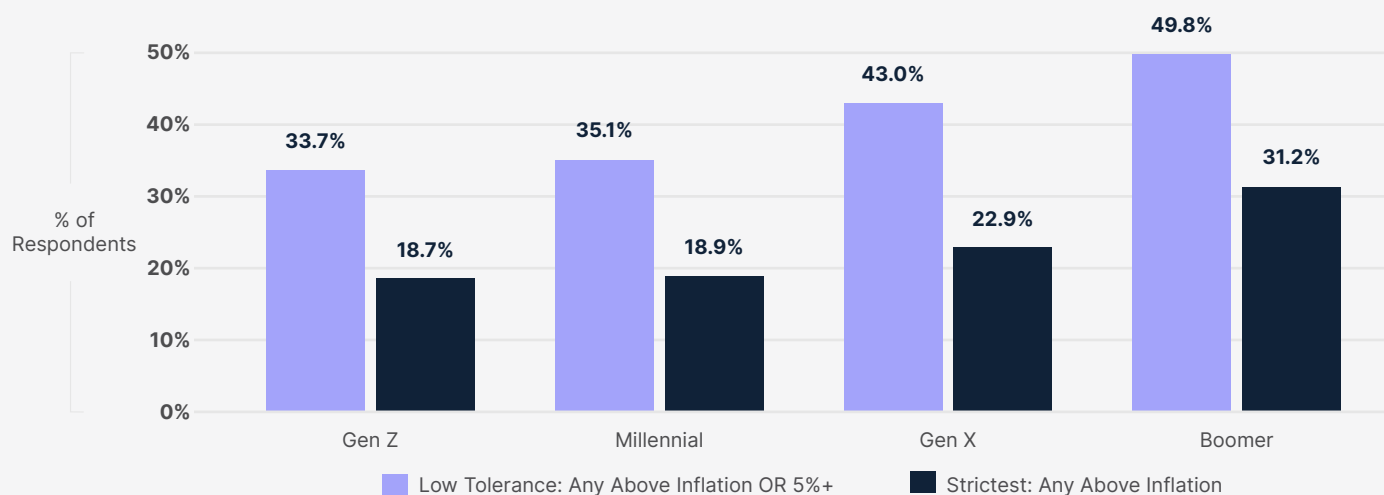
Unsurprisingly, the rent increase is the single greatest influence on renewal decisions (42.1%). However, the margin operators have to maneuver is razor-thin. Nearly a quarter of renters (22.6%) will seriously consider leaving over any increase above the rate of inflation, and another 17.4% will balk at an increase of 5% or more.

The Rent Increase Threshold: What It Takes to Prompt a Departure Conversation

At What Rent Increase Do Renters Seriously Consider Not Renewing



Rent Increase Tolerance by Generation



Interestingly, the oldest renters are the most price-sensitive. Nearly half of Boomers (49.8%) fall into the lowest-tolerance category, ready to pack up over a 5% hike. While younger renters will mathematically tolerate slightly higher percentage increases, their inherent mobility cancels out that advantage. In addition, how the increase is communicated matters almost as much as the dollar amount. Over 75% of renters across all generations demand absolute transparency in renewal communications; burying fee structures in complex lease language actively drives residents to the exit.

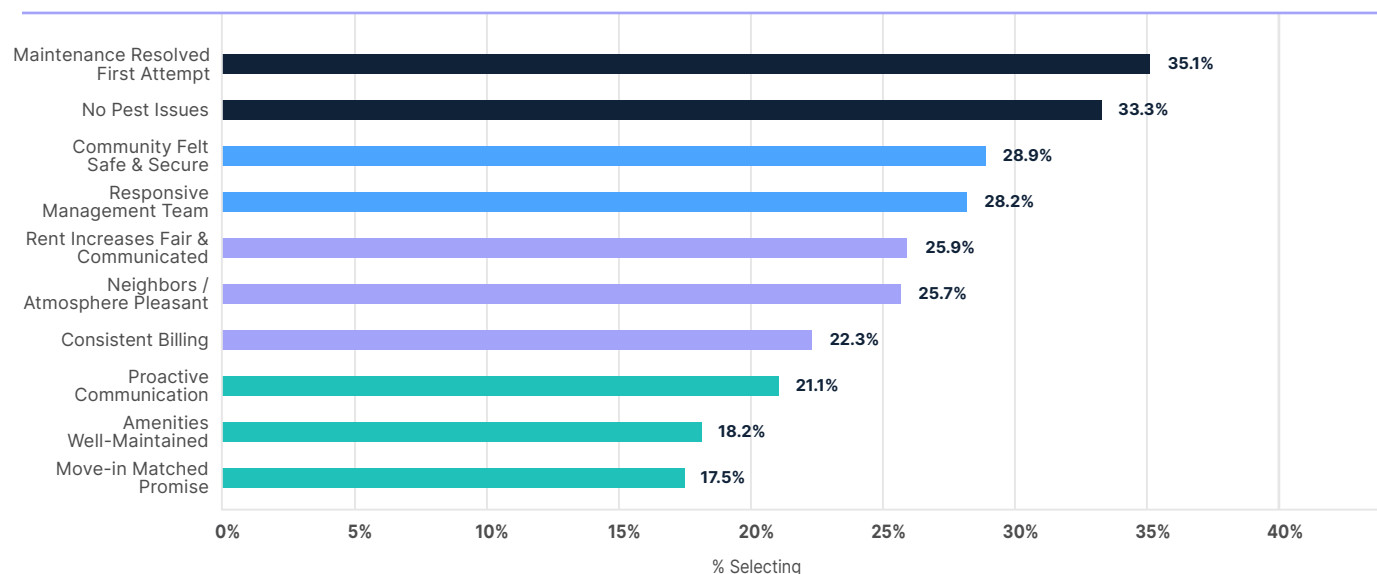
THE RETENTION MIRROR

When asked to identify the experiences that most strongly motivate them to renew versus those that drive them away, renters created a

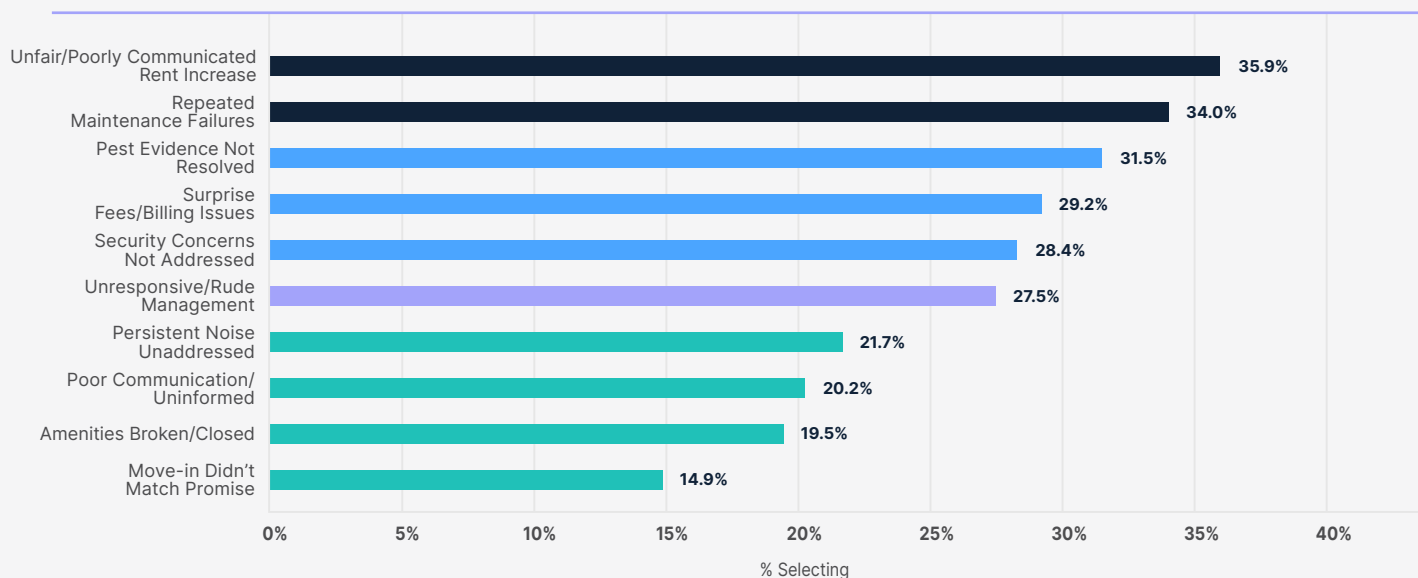
perfect mirror to prospects. The top five retention drivers are entirely operational: fast maintenance resolution (35.1%), zero pests (33.3%), safety (28.9%), responsive management (28.2%), and fair rent increases (25.9%).

The Retention Mirror: The Same Issues That Win Residents Also Lose Them

What Keeps Renters (Top Positive Experiences Motivating Renewal)



What Loses Renters (Top Negative Experiences Motivating Non-Renewal)



Conversely, the top drivers for move-outs are the exact inverse: unfair rent hikes (35.9%), broken maintenance (34%), pest evidence (31.5%), billing surprises (29.2%), and safety failures (28.4%). The equation is disturbingly simple and very similar to what gets prospects in the door. [Renters do not base their renewal decisions on upgraded pool furniture or social programming — they stay for execution on the core fundamentals of living, and they leave when those fundamentals fail.](#)

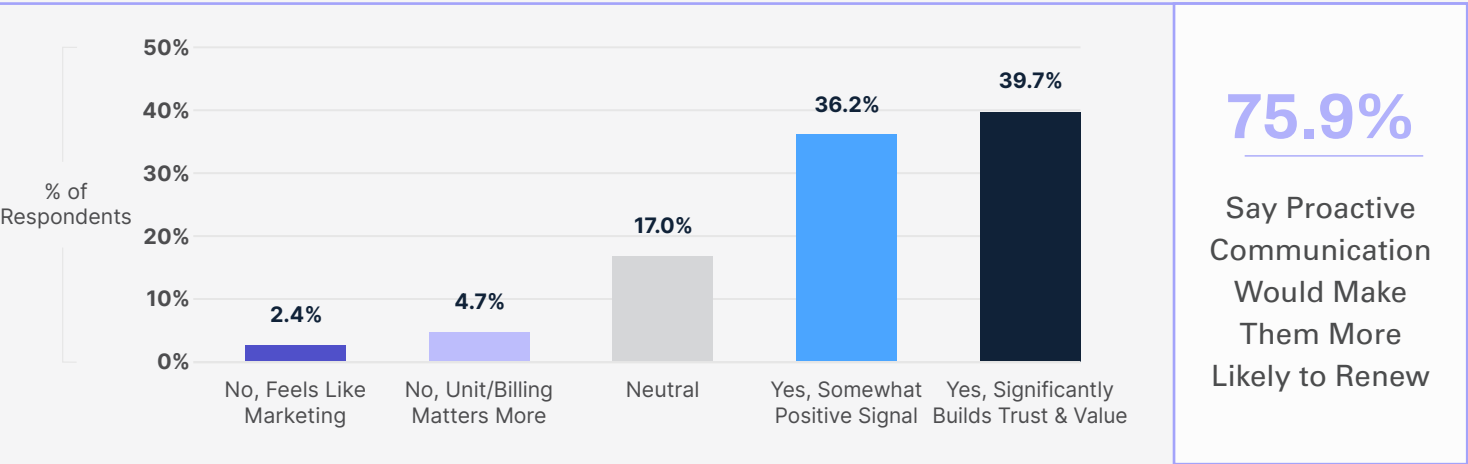
THE UNSUNG HERO: PROACTIVE COMMUNICATION

One of the most powerful, yet underfunded, retention levers is simple, proactive communication.

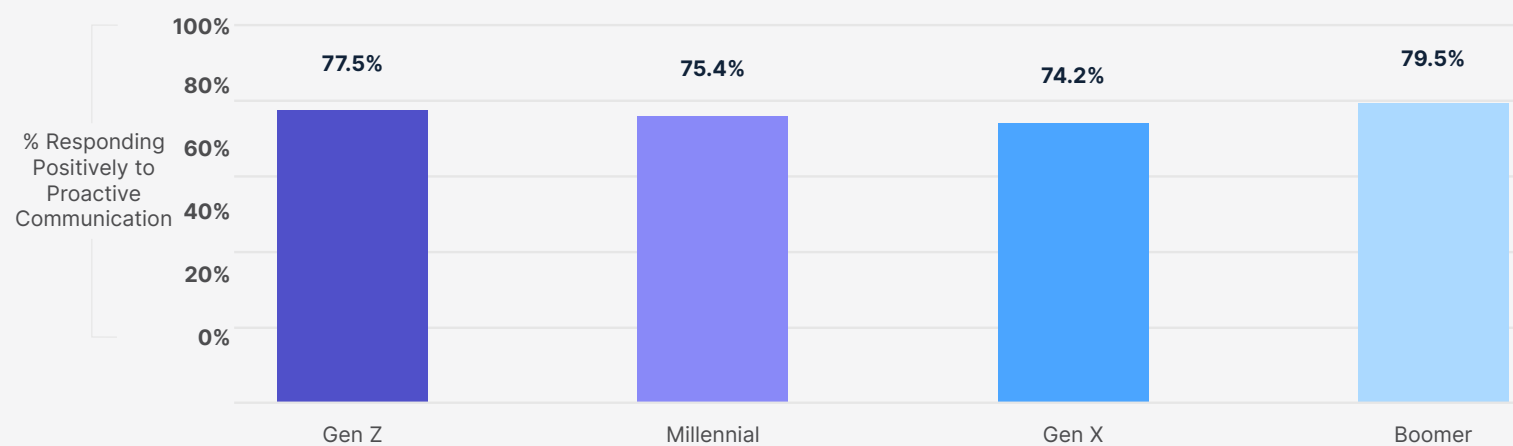
Nearly 76% of renters state that year-round, proactive updates from management, such as maintenance notifications and community announcements, make them significantly more likely to renew.

The Communication Retention Lever:
Underused, Consistently Valued Across All Generations

Does Proactive Year-Round Communication Affect Renewal Likelihood?



Proactive Communication Effect on Renewal: by Generation



This desire is entirely flat across generations, valued just as highly by digital-native Gen Z (77.5%) as it is by Boomers (79.5%). Residents are not checking Yelp to decide if they still like their apartment; only 15.9% care about reviews from newer residents when weighing a renewal. Instead, they form their opinion based on the texture of their relationship with the front office. **A community that communicates consistently builds renewal intent at every touchpoint, while a community that only communicates reactively spends twelve months eroding it.**

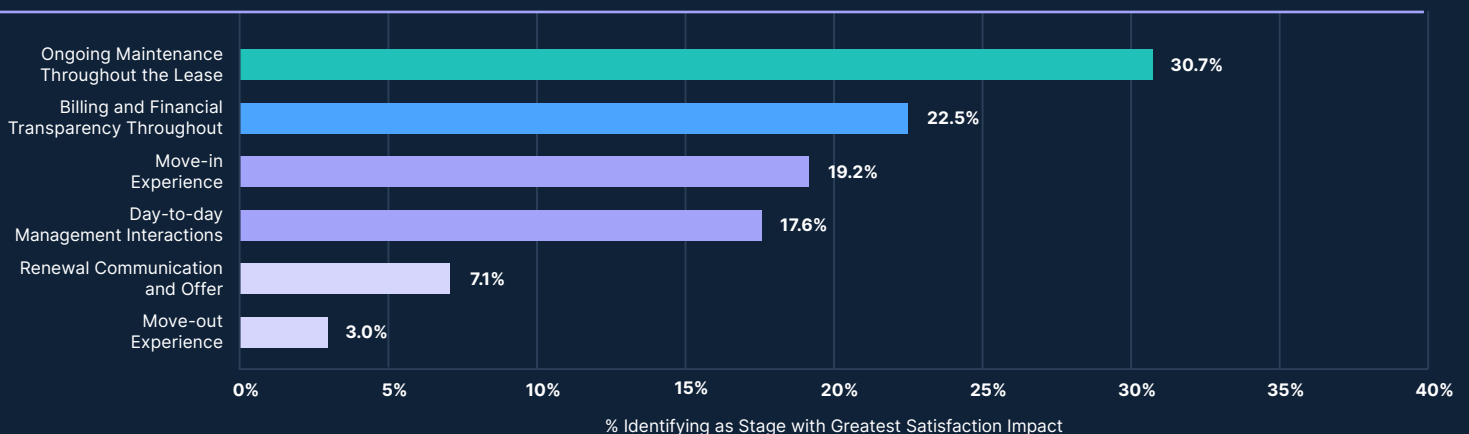
THE DANGER OF THE MIDDLE MILE

Operators traditionally isolate customer satisfaction into a handful of survey-triggered touchpoints: the move-in, the completed work order, and the pre-renewal check-in. **Yet, renters do not experience their residency as a series of disconnected events. They experience it as a continuous relationship driven by the onsite office team.**

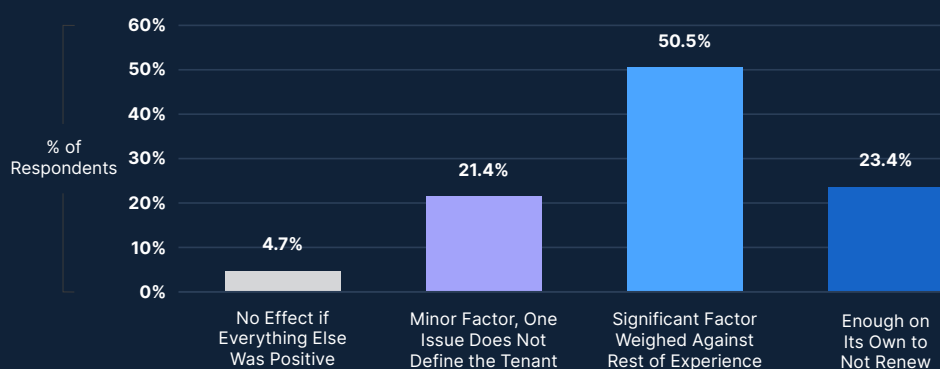
Our data shows that the heavily funded endpoints (move-in and move-out) account for only 22.2% of long-term satisfaction. The overwhelming majority of a renter's decision is forged in the "middle mile," driven entirely by the day-to-day competence of the property staff. Ongoing maintenance (30.7%), billing and financial transparency (22.5%), and daily management interactions (17.6%) collectively account for over 70% of a resident's long-term satisfaction.

The Tenancy Arc: When Satisfaction Is Shaped and How Quickly It Can Unravel

Which Stage of the Tenancy Has the Greatest Satisfaction Impact?



Effect of One Serious Unresolved Issue on Renewal Decision



73.9%

Say One Serious Unresolved Issue Matters Materially to Their Renewal Decision

If a renter has an otherwise positive experience but suffers a single serious, unresolved issue like a neglected work order or an uncorrected billing error, 73.9% say it will materially jeopardize their renewal.

A single open work order. A single unexplained charge. A single dismissive interaction with the front desk. For three-quarters of your residents, one of those failures is enough to trigger a move-out, regardless of how seamless their move-in was. You do not lose a resident when the lease renewal is delivered. **You lose them in month four, when a problem is ignored by the office, long before the paperwork ever arrives.**



Surviving the Algorithm

Nearly half of all renters now use AI to research apartments. Over 57% bypass positive feedback entirely to filter straight to the worst reviews, and a growing vanguard never visits a listing site at all; they simply open ChatGPT. The search process that once produced a simple star average now generates a ruthless, comprehensive reputation profile that no single number can hide behind.

The properties that will win the next leasing cycle are not necessarily those with the highest stars; they are the ones whose operational reality is strong enough to survive being summarized by an algorithm in two sentences.



The findings of this study provide a data-driven blueprint for competing in this unforgiving environment. It is time to act:

1. Build an AI-Readable Reputation

A negative AI summary drops tour intent at a 4.7-star property by over 62%, while a positive summary rehabilitates a 4.3-star property by 67%. **The star rating is merely the starting line; the AI summary is the final verdict. Management responses, detailed review content, and operational consistency are now direct inputs for language models.** Write your responses, and manage your reputation specifically for the algorithm that will read them.

2. Audit the Shattered Funnel

Because the traditional search path has fractured, your reputation monitoring must expand beyond Google and listing sites. You must routinely prompt AI tools (like ChatGPT and Gemini) to see the exact summaries your prospects are reading. You must monitor platforms like YouTube and TikTok and Reddit for resident-posted videos that shape your narrative behind the scenes. If you are not actively building a listening ecosystem across this entire, multichannel reality, you are operating blind to the sources actually driving your prospects' decisions.

3. Neutralize the Veto Effect at the Source

Pest infestations are an immediate deal-breaker for 49.3% of renters, and hidden fees fatally erode trust at the lease signing. These are deep operational failures that no marketing campaign or review response program can spin. **You must align your onsite operations to eliminate these deal-breakers at the source, or prepare to accept the inevitable attrition.**

4. Redraw Your Technology Boundary

Renters welcome AI for scheduling, pricing, and basic logistics, but their comfort completely inverts for billing disputes, emergency maintenance, and renewals. **Fully AI-staffed leasing models are a deal-breaker for 62% of the market. Deploy automation exactly where renters want efficiency, and fiercely protect human access exactly where they demand empathy.**

5. Treat Retention as a 12-Month Marathon

A staggering 74% of renters admit that a single, serious unresolved issue will materially jeopardize their renewal. **Ongoing maintenance is the ultimate satisfaction driver, and 76% of residents demand proactive, year-round communication.** Stop treating renewals as a 60-day marketing sprint triggered by a lease expiration. Instead, secure that signature every single day through rapid maintenance responses, proactive community updates, and transparent billing all year long.



THE GREAT ONLINE APARTMENT ADVENTURE
INTERNET ADVENTURE STUDY VI: AUGUST 2026



**Marcus
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DIRECTOR OF RESEARCH



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RESEARCH PROJECT
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