



The Mechanics of

ONLINE REVIEW SITES

AND INTERNET
LISTING SERVICES

THIRTEENTH EDITION | Q4 2024



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Executive Summary

For over a decade, J Turner Research has been the undisputed authority on online reviews in the multifamily industry. Our annual report, *The Mechanics of Online Review Sites and ILSs*, is the definitive guide to understanding the critical role of resident feedback in today's rental landscape. We pioneered this research in 2012, and our consistent, comprehensive analysis has made us the sole provider of this level of deep-dive insights.

Now in its landmark 13th edition, *Mechanics* presents the most current multifamily review trends, summarizing 2024. Our findings are backed by the most robust dataset available: we meticulously monitor all lifetime reviews for 144,253 multifamily properties nationwide, across all major review sites and ILS's. An overwhelming 94% (134,897) of these properties have at least one review, proving the significance of this feedback in the modern renter journey.

This edition draws upon a massive database of 18,003,141 reviews, analyzing the feedback on over 8 million individual units. This data, unique to J Turner Research, provides unparalleled insights for benchmarking and strategic planning.

This level of granular data and in-depth analysis is available only through J Turner Research. For access to our previous research, including the prior editions of *Mechanics*, please visit jturnerresearch.com/research.





13th Edition Highlights

- **Review Volume Dip with a Twist:** While 2024 saw the lowest annual influx of new reviews since 2017 (1,468,871), this was primarily due to a significant purge of 388,561 reviews across several platforms. If these reviews were reinstated, the total would align with the five-year average.
- **Google's Reign Continues:** Google maintained its strong leadership in the review space, capturing a commanding 64% (942,421) of all reviews in 2024. This reaffirms its position as the dominant platform for online feedback.
- **Shifting Market Share:** Google has seen a rise in its total review share, capturing 41% of all lifetime reviews in Q4 2024. Apartments.com has also started gaining ground, climbing to 5%. Conversely, traditional platforms like ApartmentRatings and Apartmentguide have experienced a decline in market share.
- **Overall Positive Sentiment:** Despite the review volume dip, the industry witnessed a substantial increase in positive feedback, with 50% more commendations than criticisms. This is the most favorable sentiment observed since 2021.

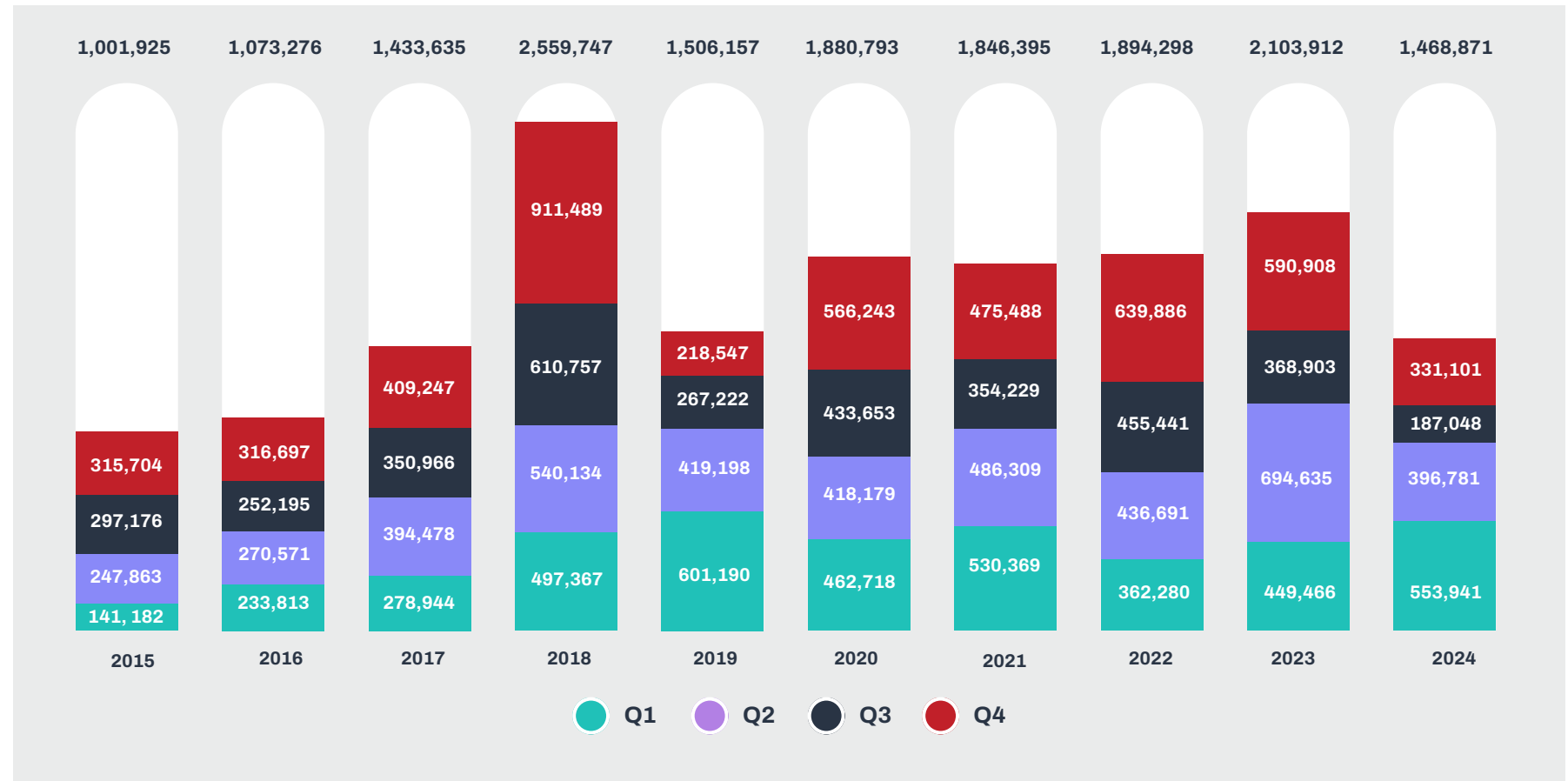


The End of Online Reviews?

J Turner Research, the premier authority in online reputation insights, meticulously monitors feedback for a vast portfolio of over 144,000 properties. By the close of Q4 2024, this expansive network had accumulated an impressive total of 18,003,141 reviews over the course of its digital existence.

In the 12th edition of *Mechanics*, our projections anticipated a robust 1.9 million reviews for the year; however, the year concluded with a still significant, yet somewhat lower, total of 1,468,871 new reviews – the lowest annual influx since 2017. This dip, however, is attributed to a notable purge of 388,561 reviews across prominent platforms like Facebook, Rent., Apartmentguide, and Yelp during the latter half of 2024. Should these reviews be reinstated, the 2024 total would reach an estimated 1,857,432, aligning with the five-year average trend.

Therefore, the impact of online reviews on the landscape of property management remains as potent as ever.

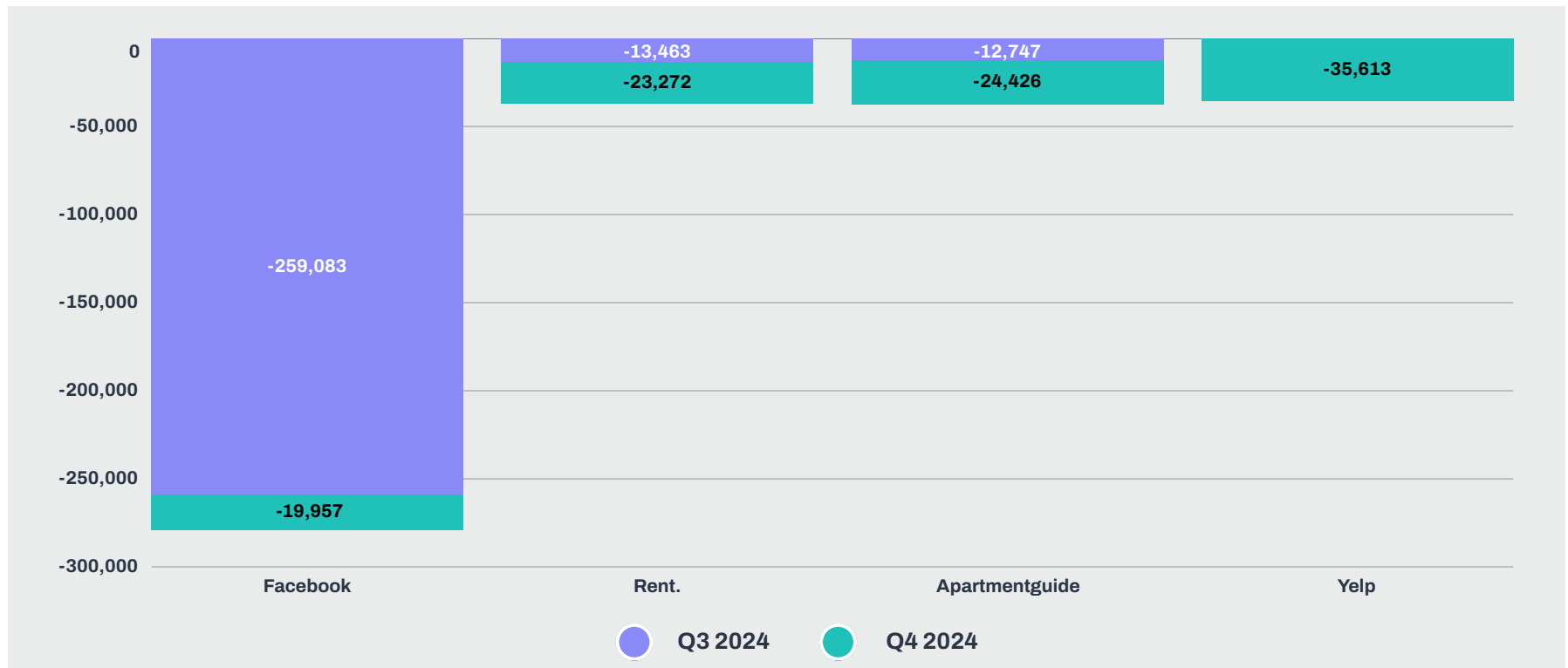


A Quick Look at the **Lost Reviews**

While J Turner Research diligently tracks the ever-expanding universe of online feedback, the very platforms that host these vital voices are not without their own internal machinations. A deep dive into the review ecosystems reveals a landscape that is subject to unique policy, IT errors, and structural shifts. For instance, platforms like Yelp, known for upholding rigorous content standards, have consistently enforced their guidelines of verifying “authentic” reviews, resulting in the removal of 35,613 reviews during Q4 of 2024. Specifically, these reviews are getting deleted or moved out of sight to a section labeled “not currently recommended.” This speaks to their dedication to preserving the quality and authenticity of the feedback ecosystem – though it does impact the overall volume.

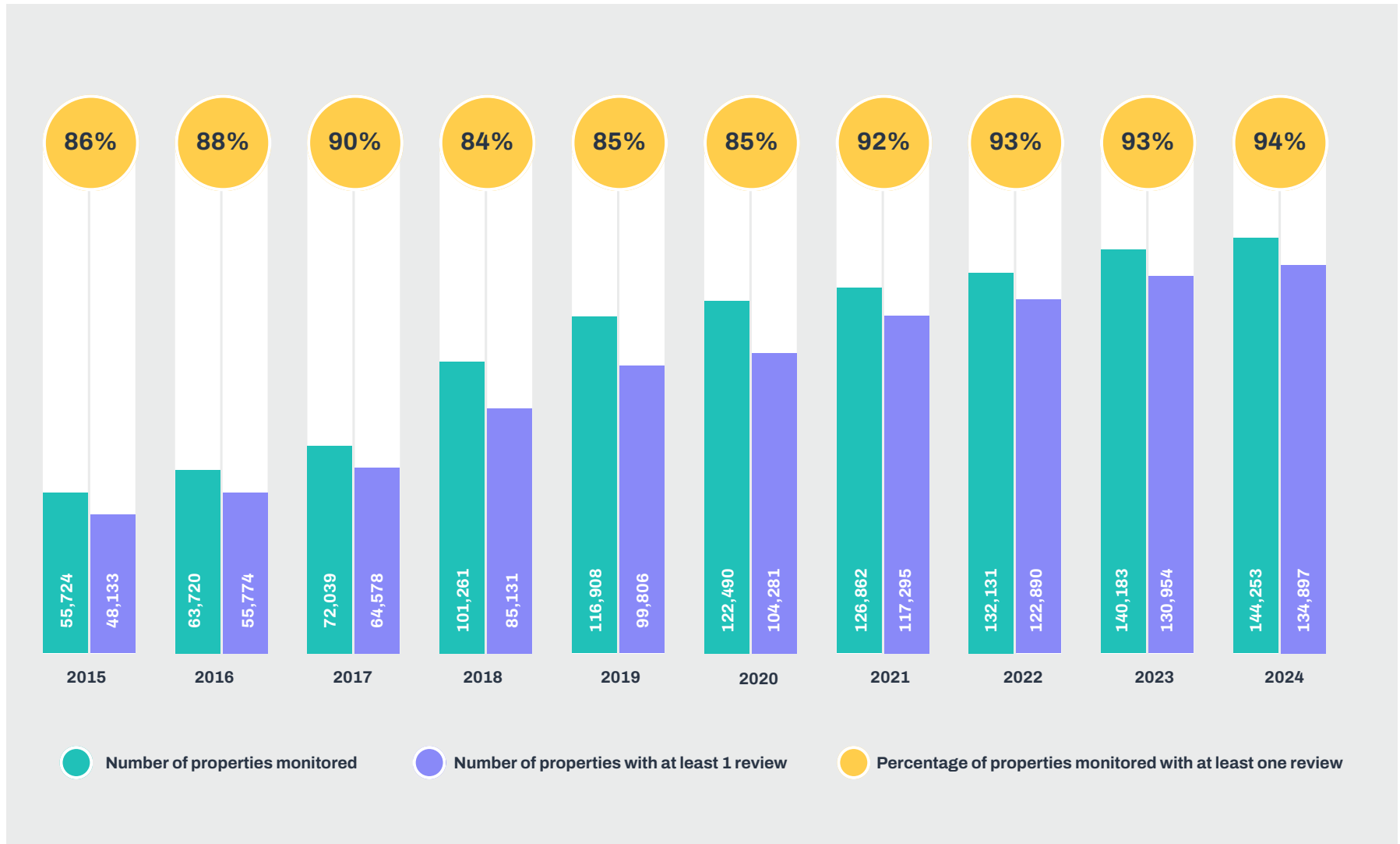
Further complexities emerged in the latter half of 2024, as RentPath’s Apartmentguide and Rent. encountered unforeseen consequences arising from a system migration. This resulted in the regrettable loss of 73,908 reviews across the two platforms in Q3 and Q4 of the year, an unwelcome glitch in the matrix of digital feedback.

Finally, we turn our gaze to Facebook. The tech giant saw a considerable reduction of 279,040 reviews during the latter six months of 2024. While this may align with their publicly stated intention to downsize or transition away from the review functionality on their platform, it also adds another fascinating dimension to the review landscape. It begs the question, what further shifts lie ahead in the dynamic world of online feedback?



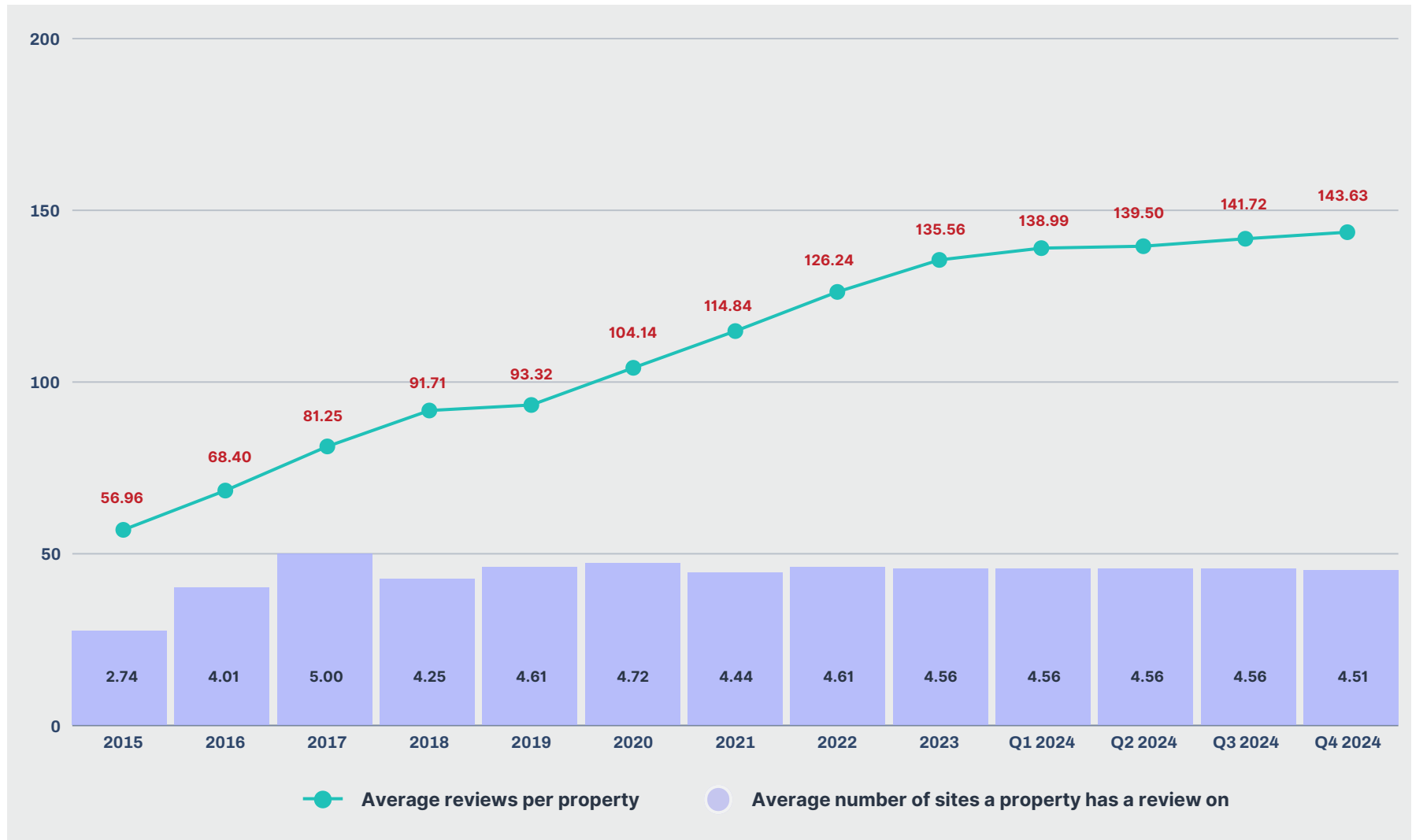
At Least One Review

Of the 144,253 properties currently under the meticulous monitoring of J Turner Research, an impressive 134,897 – a striking 94% – boast the presence of at least one online review. It is therefore a self-evident truth that online reviews are not merely a trend, but a critical means by which properties actively distinguish themselves within the competitive market arena.



Actually, They're Growing

While the narrative surrounding the importance of reviews remains resolutely unchanged, the sheer volume of feedback continues its upward trajectory. As of Q4 2024, the average property has amassed a substantial 143.63 reviews dispersed across a robust 4.51 distinct review platforms. This speaks to the dynamic nature of the digital discourse and reinforces the crucial role a diverse array of viewpoints plays in informing a prospect's quest to find their ideal home.

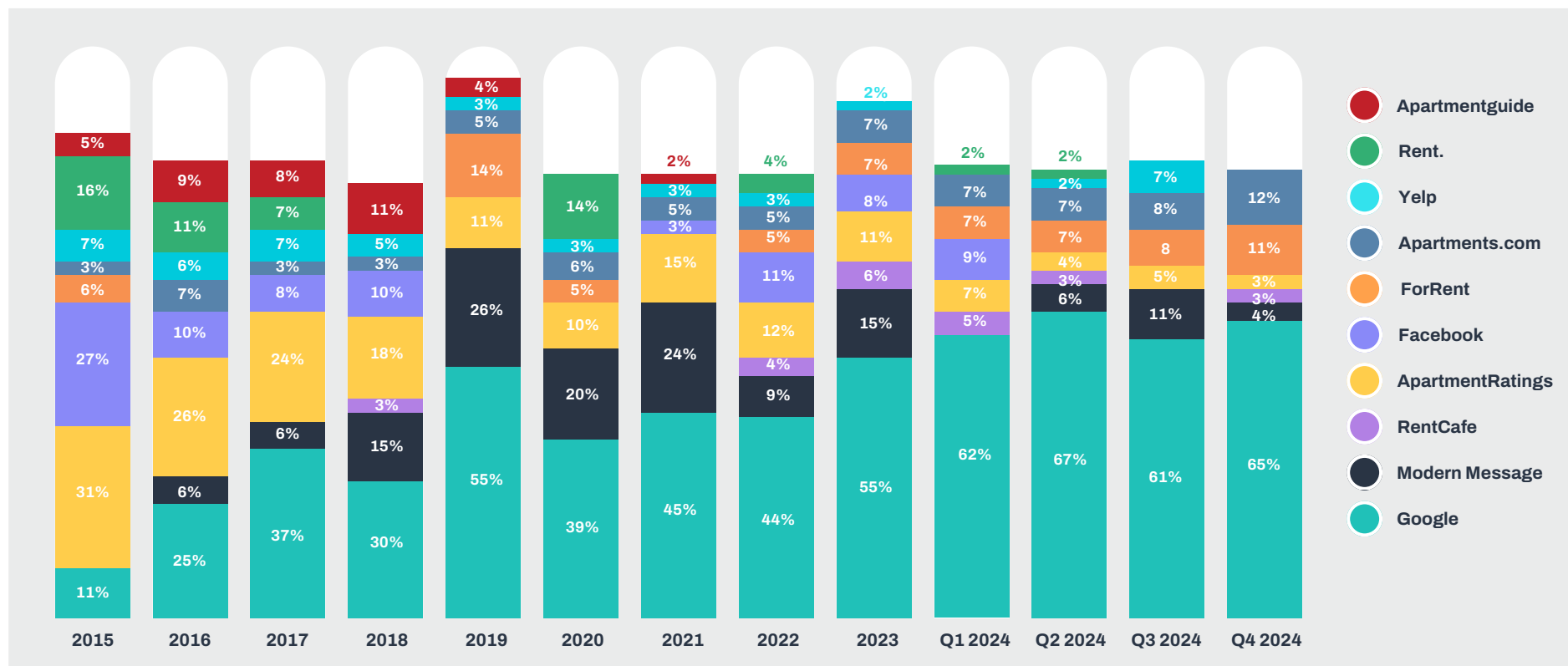


Who Holds the Power

In the spirit of our previous iterations of *Mechanics*, we now turn to the prevailing titans of the online review arena. Google has once again demonstrated its formidable command over the digital feedback landscape for the latter half of 2024. Of the year's tally of 1,468,871 reviews, a resounding 942,421 were entrusted to the Google platform, representing a substantial 64% share and firmly solidifying their position at the pinnacle of the online review ecosystem.

Following in Google's considerable wake, we find Apartments.com, contributing a notable 118,935 reviews (8% of the annual total), and ForRent, with a near-identical 119,035 reviews (also 8%). It's worth noting, however, that ForRent's impressive count largely stems from their aggregation of reviews from a variety of external sources. Therefore, in terms of organic platform-specific feedback, the next highest contributor was ApartmentRatings, which amassed a respectable 77,012 new reviews, accounting for 5% of the annual total.

It is imperative that we underscore, once more, that the landscape continues to shift. Facebook and the RentPath owned sites have chosen to actively remove reviews from their platforms. Furthermore, while Yelp experienced an encouraging surge of approximately 13,000 reviews during Q3, representing 7% growth, they regrettably reversed course in Q4, ultimately reducing their overall volume. Thus, we observe a dynamic and, at times, contradictory interplay within the review space, further reinforcing the critical need for continuous observation and analysis.



This graph does not highlight review sites that have a market share of 1% or less as of Q4 2024

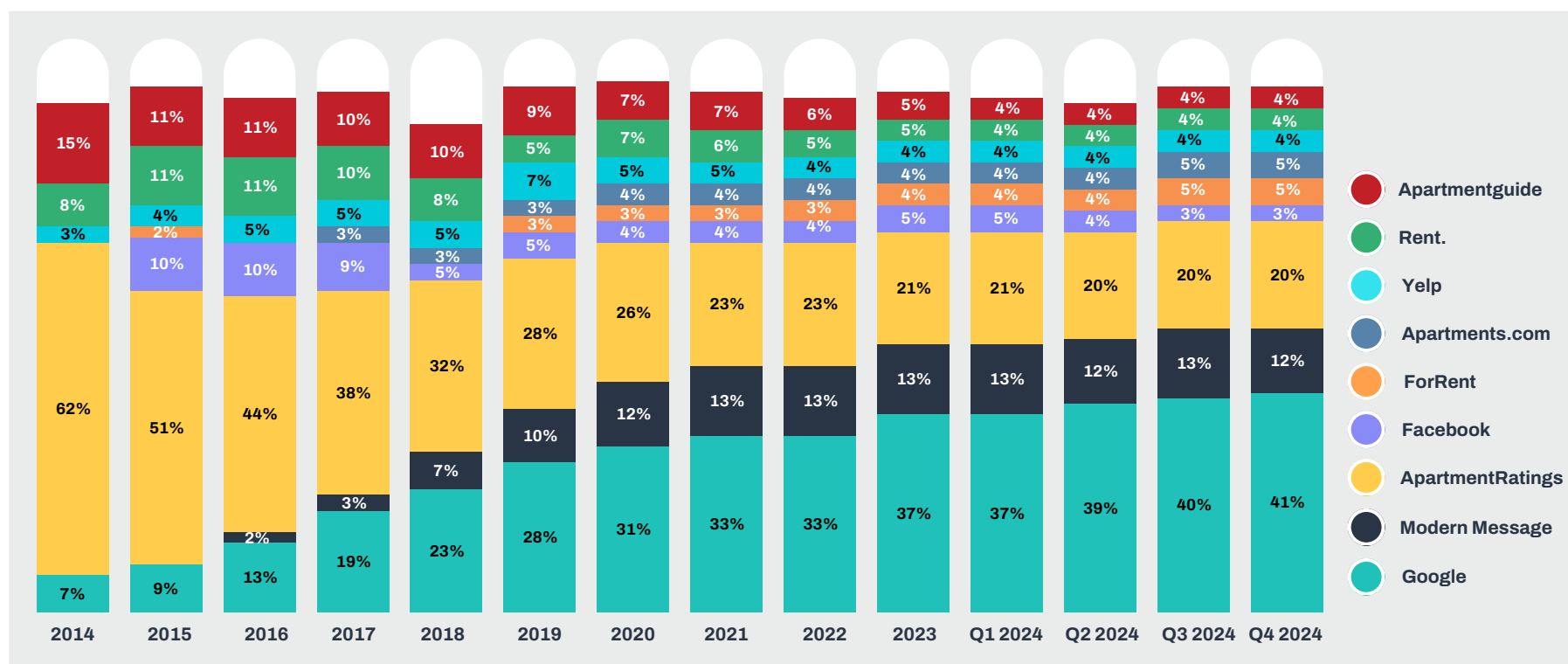
*Graph does not include all review sites monitored so totals may not equal 100% for a given year

A Change in the Landscape

In our 2024 Internet Odyssey, aptly named *New Truths of Prospective Renters*, we unearthed a compelling phenomenon: Apartments.com and Zillow have emerged as prominent launchpads for renters embarking on their quest for a new abode. This ascendance is primarily attributable to their prime positioning in Google search results for the ubiquitous query, “Apartments near me.” In our newest Internet Adventure Report, *The Great Online Apartment Adventure*, the team further probed the digital terrain and discovered that Google, Apartments.com, and Zillow consistently dominate as frequented review hubs for prospective renters.

The shifting tides within the total lifetime market share of reviews are beginning to manifest themselves with considerable force. During the fourth quarter of 2024, Google firmly established its dominion, commanding a noteworthy 41% of the overall review share. This ascendancy has been a steadily escalating trend since 2014. Furthermore, Apartments.com has also started to seize a larger piece of the pie, experiencing a jump from 4% to 5% of the total review share.

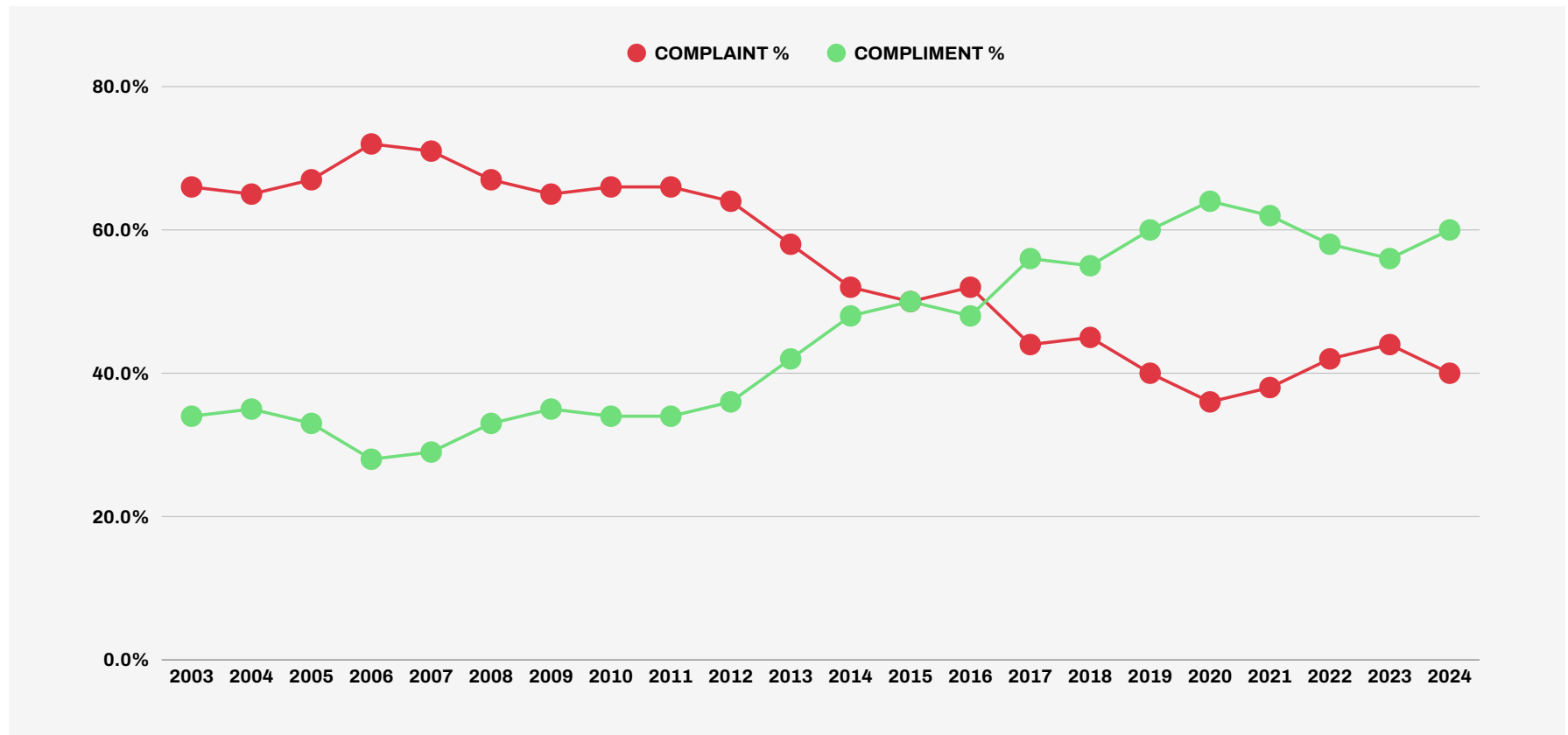
Conversely platforms like ApartmentRatings and Apartmentguide, which reigned supreme during the nascent stages of online reviews, are now witnessing a gradual erosion of their market share. ApartmentRatings has seen its grasp on the market slip from a commanding 62% to a more modest 20% a decade later. Similarly, Apartmentguide has experienced a precipitous decline from 15% to a mere 4% during this same epoch.



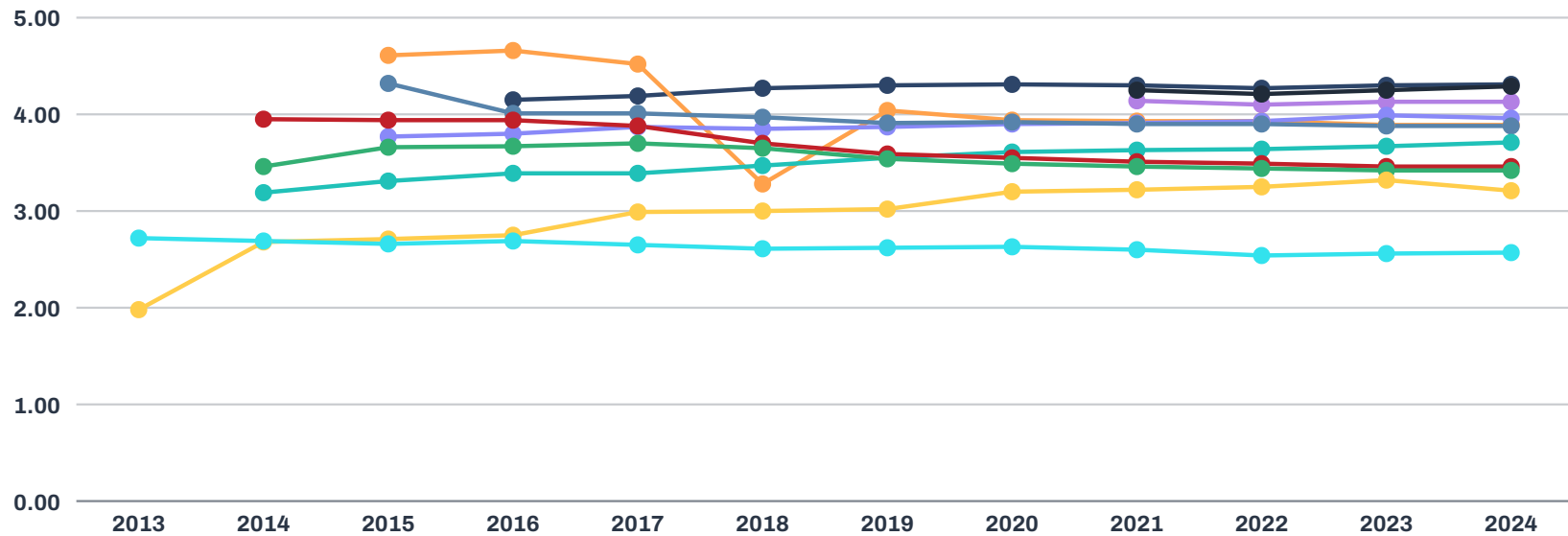
A Healing Industry?

Following a comprehensive scrutiny of the digital discourse, the year 2024 emerges as a veritable beacon of positivity within the online review landscape. The data revealed a compelling narrative: a staggering 50% more commendations were recorded than criticisms. This markedly elevated ratio of compliments to complaints represents the most favorable sentiment the industry has witnessed since 2021, and marks the first ascendance in aggregate disposition since the shift from 2019 into 2020.

Furthermore, the year 2024 shares the podium with 2019, securing joint third position for the highest overall review sentiment recorded since J Turner Research first embarked upon this critical endeavor in 2003. This noteworthy achievement is only surpassed by the halcyon days of the pandemic years, specifically 2020 and 2021, a fact which speaks volumes regarding the overall climate of the marketplace.



This resurgence of positive feedback is mirrored by a tangible uplift in overall average ratings across the key review platforms. Let the record show that Modern Message, RentCafe, ForRent, Facebook, Google, Yelp, and Zillow have each demonstrated a positive trajectory in their respective average ratings from 2023 into the year 2024.



	2013	2014	2015	2016	2017	2018	2019	2020	2021	2022	2023	2024
Modern Message				4.15	4.19	4.27	4.30	4.31	4.30	4.27	4.30	4.31
RentCafe									4.14	4.10	4.13	4.13
ForRent			4.61	4.66	4.52	3.28	4.04	3.94	3.93	3.93	3.89	3.89
Facebook			3.77	3.80	3.87	3.85	3.87	3.90	3.91	3.93	3.99	3.96
Apartments.com			4.32	4.01	4.01	3.97	3.91	3.92	3.90	3.90	3.88	3.88
Google		3.19	3.31	3.39	3.38	3.47	3.55	3.61	3.63	3.64	3.67	3.71
Apartmentguide		3.95	3.94	3.91	3.88	3.70	3.59	3.55	3.51	3.49	3.46	3.46
Rent.		3.46	3.66	3.67	3.70	3.65	3.54	3.49	3.46	3.44	3.42	3.42
ApartmentRatings	1.98	2.68	2.71	2.75	2.99	3.00	3.02	3.20	3.22	3.25	3.32	3.21
Yelp	2.72	2.69	2.66	2.69	2.65	2.61	2.62	2.63	2.60	2.54	2.56	2.57
Zillow									4.25	4.21	4.25	4.29



Several factors contribute to the resurgence of positive sentiment in 2024. The multifamily industry appears to have adapted to the post-COVID landscape by refining its approach to resident relations. As residents have come to expect faster, more convenient service, management companies have invested in new technologies and processes, such as chatbots and centralized leasing, to improve communication and efficiency.

Importantly, the data emphasizes the critical role of the staff-resident relationship. Customer service, communication, and empathetic interactions now heavily influence resident satisfaction. This emphasis on service represents a shift from previous years, where amenities were more frequently cited.

Below are all of the operative areas that saw a greater number of compliments and less complaints year-over-year:

PERCENTAGE OF REVIEWS (ALL RATINGS) WITH A COMPLIMENT OR COMPLAINT						
CATEGORY	COMPLIMENT			COMPLAINT		
	2023	2024	YOY Change	2023	2024	YOY Change
CUSTOMER SERVICE	54.86%	57.81%	5.38%	14.85%	14.48%	-2.48%
COMMUNICATION	9.01%	9.99%	10.93%	9.94%	9.81%	-1.30%
MAINTENANCE SERVICE	18.51%	20.17%	8.98%	9.33%	9.24%	-0.95%
MAINTENANCE TIMELINESS	11.07%	11.74%	6.01%	5.43%	5.28%	-2.67%
MOVE IN QUALITY	3.98%	4.19%	5.07%	3.36%	3.17%	-5.76%
INTERIOR LIGHTING	0.34%	0.40%	16.98%	0.39%	0.35%	-9.52%
MAINTENANCE CLEANLINESS	0.21%	0.26%	22.72%	0.19%	0.17%	-11.74%



Conclusion

The year 2024 presented a fascinating dichotomy in the online review landscape. While the overall volume of reviews experienced a dip due to platform purges, the underlying significance of these digital testimonials remains as potent as ever. In fact, the average property boasts a healthy collection of reviews spread across multiple platforms, demonstrating their enduring influence in the renter's journey. The shifts in platform dominance, with Google solidifying its lead and Apartments.com gaining ground, highlight the ever-evolving nature of this ecosystem. More importantly, the considerable increase in positive feedback and overall rating improvements across the board underscores a tangible improvement in the resident experience — a welcome trend for the industry as a whole.

Recommendations:

- **Prioritize Proactive Online Reputation Management:** Consistently maintain a strong presence on key platforms (Google, Apartments.com, Zillow) and actively solicit genuine, positive resident reviews. Respond to all feedback, both positive and negative, to demonstrate commitment and gather valuable insights.
- **Focus Marketing Investments on High-Engagement Platforms:** Identify the 4-5 platforms where prospective renters are most actively engaged and concentrate your marketing efforts there. Given its market share, prioritize Google.
- **Leverage Authentic Reviews in Marketing Materials:** Emphasize the importance of genuine reviews in your listings and marketing copy. Use review data to optimize descriptions, highlight strengths, and address potential concerns.
- **Utilize Review Management Tools for Optimization:** Implement review management tools to track online reputation performance, identify areas for improvement in resident experience, and gain competitive insights to inform strategic decisions.

The online review landscape is not a static entity; it's a living, breathing ecosystem that requires constant observation and adaptation. By understanding these trends, implementing proactive strategies, and cultivating a resident experience that inspires positive feedback, owners, operators, and marketers alike can effectively harness the power of online reviews and secure a competitive advantage in the ever-evolving world of property management. The future of success is not in fearing the shifts, but in understanding them and acting accordingly.

