

2023 NMHC/RF Customer Experience (CX) Technology Report

Preview

November 1, 2023

The following slides showcase a selection of findings and insights from the 2023 NMHC/RF Customer Experience (CX) Technology Survey. The complete report will be available to NMHC members in mid-November 2023.

2023 Customer Experience (CX) Technology Survey

Survey Overview

The multifamily digital landscape has been radically transformed by the 'Great App Explosion', presenting both unprecedented opportunities and challenges. For multifamily owners and operators, navigating this explosion is essential to maintaining a competitive advantage and delivering a superior resident experience. To evaluate the influence and effectiveness of the proliferating use of applications shaping customer touchpoints within multifamily, RealFoundations partnered with NMHC to launch the 2023 Customer Experience (CX) Technology Survey.

The multifamily industry is at a critical point for technology adoption and customer experience enhancement. The underlying goal of the survey was to delve deeper into the applications used to improve the customer journey, along with the management and performance measurement of the technology, and ultimately empower owners and operators to enhance their technology capabilities, irrespective of their scale or resources.

Survey Methodology

The survey design involved collaboration with NMHC member committees, RealFoundations, and NMHC staff, and was distributed digitally to NMHC's active member base. A total of 40 multifamily companies participated in the survey, with responses garnered from leaders in marketing, operations and technology. The representative pool of respondents comprised a diverse range of company sizes, grouped as small (fewer than 10k units) to very large (over 60k units), with significant representation from large companies having 25,000 to 59,999 units in their portfolio. Along with company size, the respondent organizations were categorized as either Owner & Operator, Owner and 3rd Party Manager, and 3rd Party Manager.

Questions within the survey focused on technologies utilized for 32 distinct Customer Experience areas; 25 customer-facing and 7 internally-facing, all which support the customer journey, such as:

- How many apps are operators managing throughout the customer journey?
- Which customer touchpoints do companies view as being the most impactful customer service opportunities?
- What customer touchpoints are currently automated? What are the obstacles to automating additional touchpoints; time, money, resources, expertise, human-first culture, etc.?
- When a new application is added to the technology stack, what are the most pressing goals?
- How are companies measuring the impact of applications on the customer experience? On internal operations?

Although the survey requested data related to in-use technology, specific technology brands were not named in the initial survey results or final report. Responses were carefully anonymized and aggregated to maintain respondent confidentiality. These results were analyzed to produce the 2023 Customer Experience (CX) Technology Report.

Disclaimer: "Information contained herein is a direct reflection of the survey responses provided by company respondents; information in no way reflects RealFoundations' opinion or expressed recommendations of any technology referenced."

2023 Customer Experience (CX) Technology Report

Summary Observations & Findings

The survey reveals that most multifamily operators are utilizing 10 to 20 different solution providers in the delivery of the customer experience. The wide array of technology solutions are predominantly managed by the Marketing department, followed by the Property Operations and Technology teams.

Most companies are applying a structured approach to technology adoption, with 95% of companies emphasizing the importance of setting explicit goals and objectives when implementing new solutions. Almost 61% of survey respondents considered improving efficiencies as their top priority, ancillary revenue is not a primary driver. Factors like customer service and satisfaction also play a significant role, while compliance and cost reduction have varied importance among survey respondents.

42% of companies state that customers have benefitted the most from 'Attract and Engage' technology. In the next 12 to 18 months, companies are poised to invest more in enhancing the 'Resident Experience' and 'Renewals' touchpoints within the customer journey, along with refining the 'Application' process.

All respondents view budget constraint as a significant obstacle when implementing new technologies. Additionally, balancing human interaction and the use of technology at customer touchpoints to support a company's culture and brand is seen as an obstacle when adopting new technology. Not only do companies report resource constraints for the research, identification and evaluation of viable solutions, they report the lack of resources (which include time, knowledge, dedicated people, etc.) to fully support the solution once implemented.

Companies are prioritizing the measurement of engagement, especially when deploying new technology solutions. This focus emphasizes the commitment to understanding customer interactions and refining, when necessary. A diverse set of tools and metrics are being used to measure engagement, including Google Analytics, conversion ratios, vendor-provided and custom reports and dashboards, along with simple metrics like views, clicks and time spent in the application.

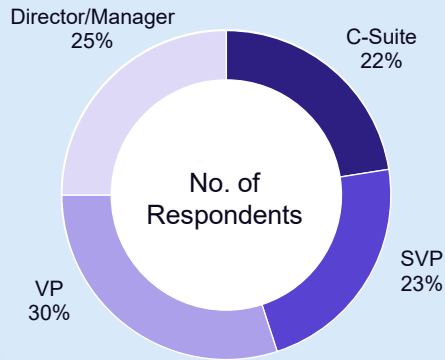
The 2023 Customer Experience (CX) Technology Report offers a diverse, technology-agnostic, panoramic view of the multifamily customer experience technology landscape. While respondents demonstrate a strong inclination towards a wide range of technologies, from virtual tours to resident experience platforms, the road to full scale adoption is laden with challenges.

As the industry continues to evolve, these insights serve as a compass, pointing towards areas of focus, challenges to overcome, and the immense potential that technology holds in enhancing the multifamily customer journey.

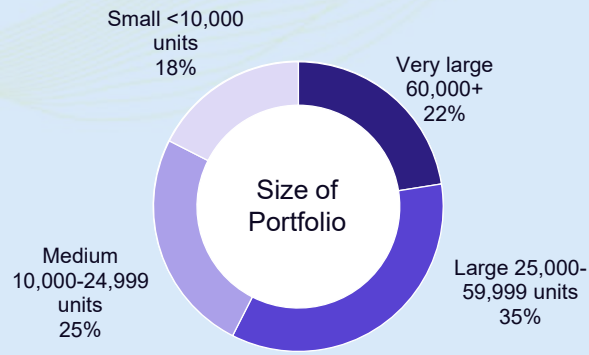
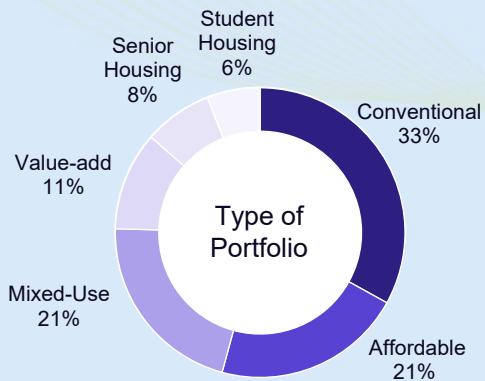
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2023 CX Tech Survey | Respondent Overview

Respondent Job Title



Respondent Portfolio Characteristics



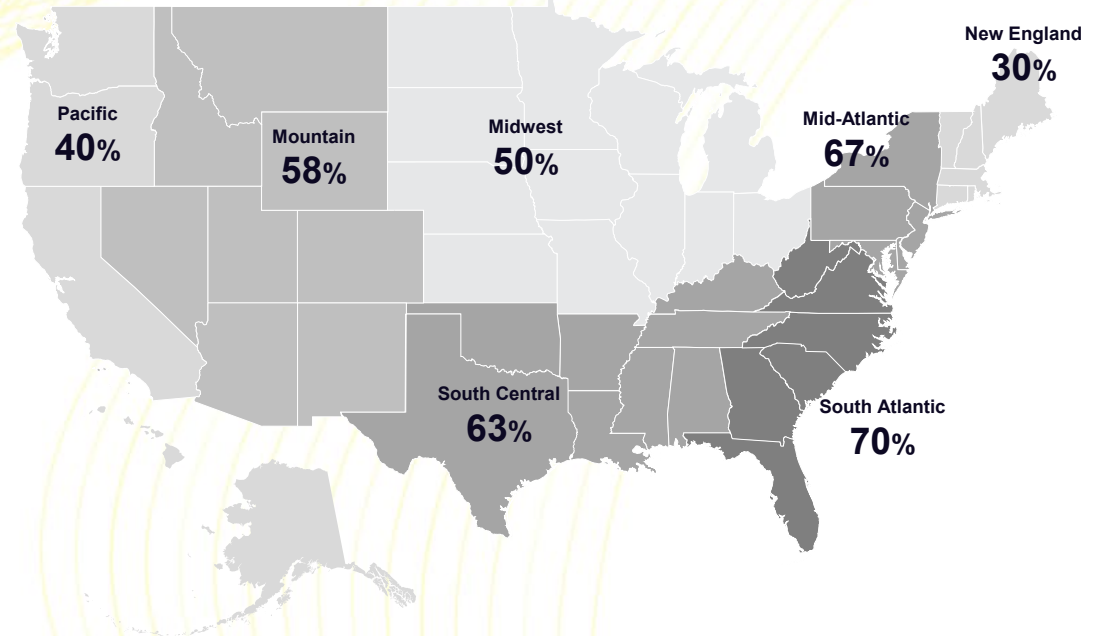
2.2 M+
Units

58%
Owner & Operator

22%
Owner & 3rd Party
Manager

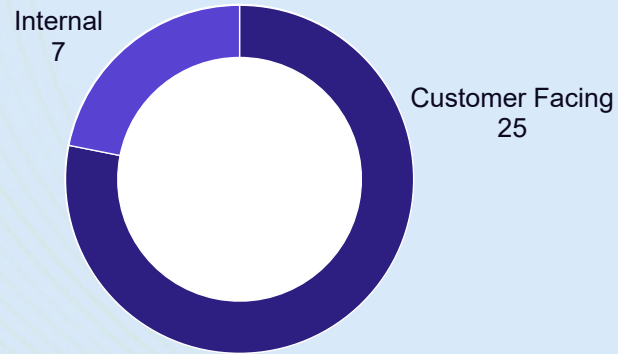
20%
3rd Party Manager

Portfolio Locations

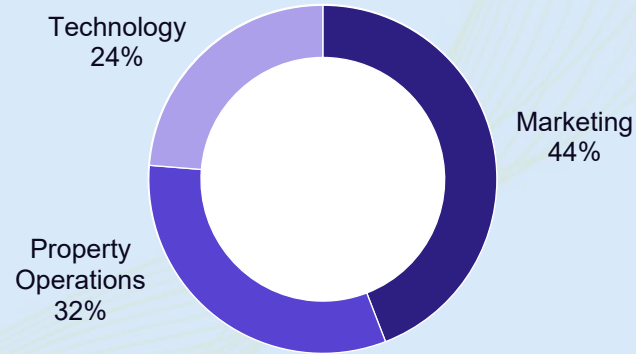


2023 CX Tech Survey | Technology Snapshot

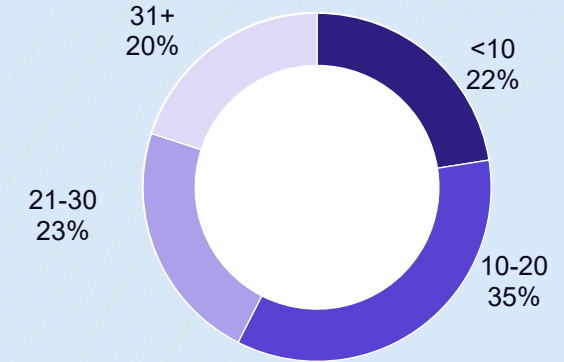
Technologies Included in Survey



Technology's Managing Department



No. of Customer Journey Applications in Use

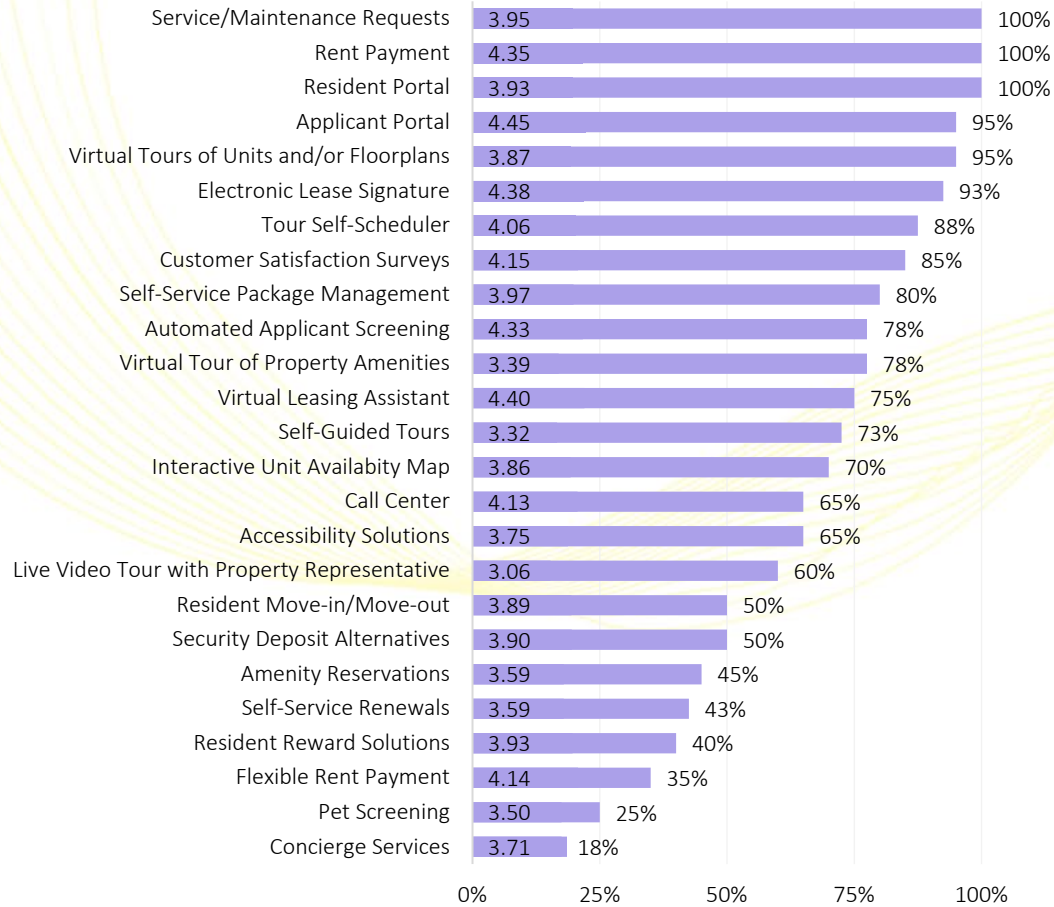


Customer Journey For Multifamily Resident and Survey Question Technology Areas

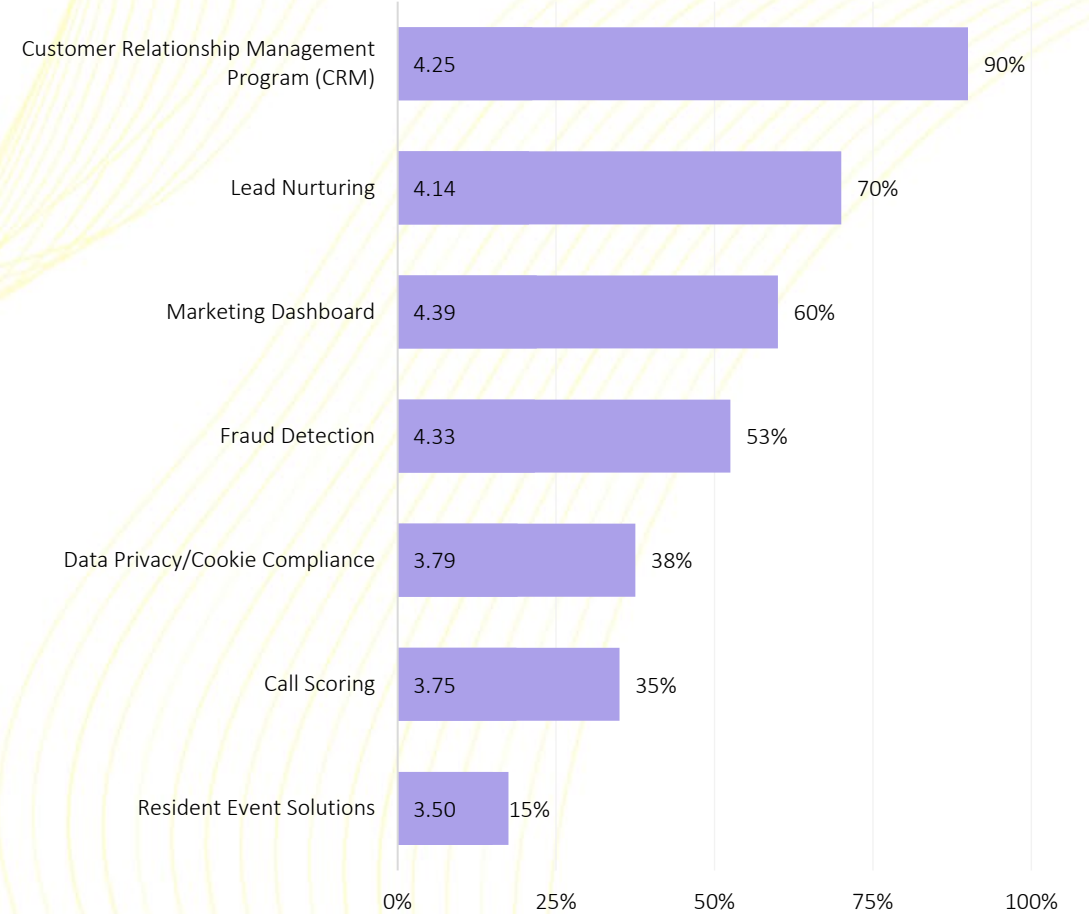


2023 CX Tech Survey | Technology Snapshot

% Utilization of Customer Facing Technology; 5-Point Customer Engagement Scale

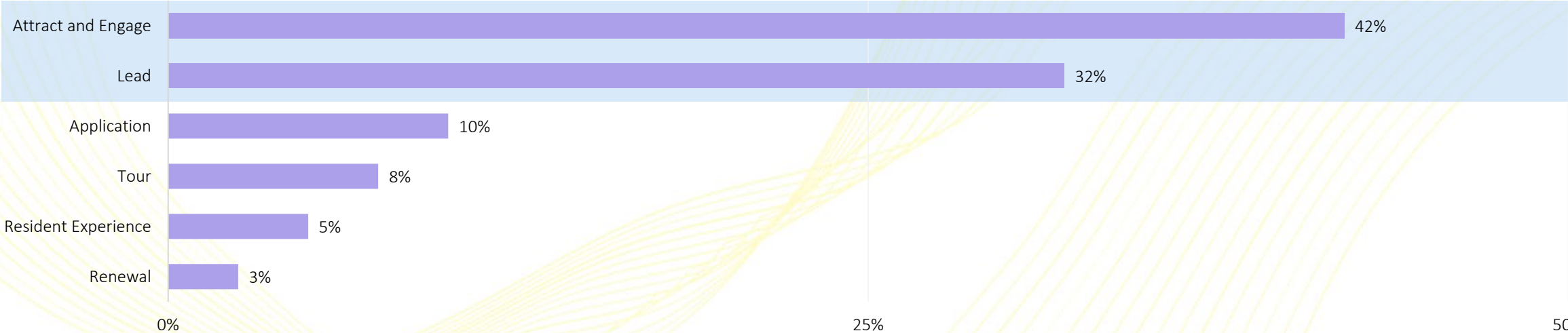


% Utilization of Internal Technology; 5-Point Internal Engagement Scale



Attract and Engage and Lead Areas Benefit Most from New CX Technology

What area of the customer journey has benefitted most from new technology solutions?



CX Survey Insights

The COVID-19 pandemic forced operators to quickly reimagine the leasing process. As a result, the early phases of the customer journey, including attracting, engaging potential residents, and handling leads, saw the most significant advantages from the introduction of new technology solutions.

Industry Insights

51% of multifamily property managers surveyed perceive that resident expectations for better community technology have increased.¹

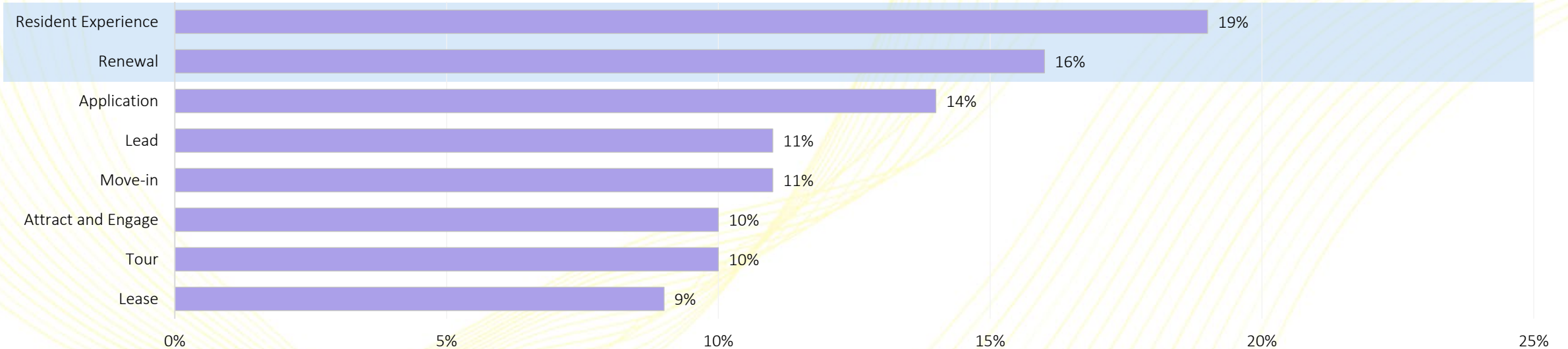
Voice of the Customer

Zego's 2023 Resident Experience Management Report ranks a "technology-enabled lifestyle" as the most important resident experience aspect for renters.¹

Source: [12023 Resident Experience Management Report \(Zego\)](#)

Resident Experience and Renewal are the Next Focus Areas

Which areas of the customer journey will companies focus on in the next 12-18 months?



CX Survey Insights

Based on survey feedback, the Resident Experience area has the most potential for immediate focus:

- 40% utilization of Self-Serve Renewals
- 43% utilization of Amenity reservations
- 40% utilization of Resident Reward solutions
- 17.5% utilization of Concierge Services with a high customer engagement ranking of 4.75

Industry Insights

- “57% of landlords are placing the management of resident relationships above all else when it comes to investment dollars.”¹
- According to a study performed by McKinsey, a thoughtful customer journey can boost customer satisfaction by 20%.²

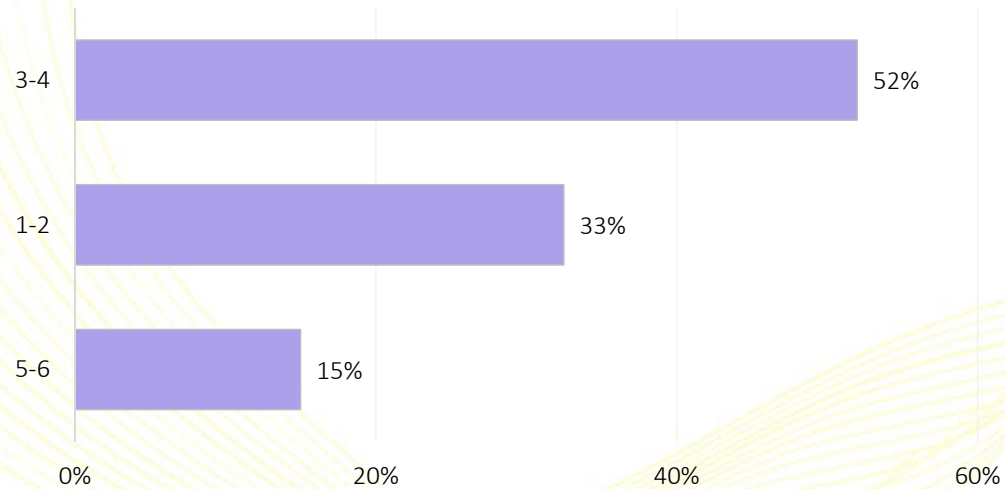
Voice of the Customer

“Today’s residents are accustomed to convenience and ease of use in their everyday lives. The right property technology (PropTech) can provide communities with safety, comfort, community, security and more. This also returns valuable time to on-site teams, easing the operational load that is so needed.”³

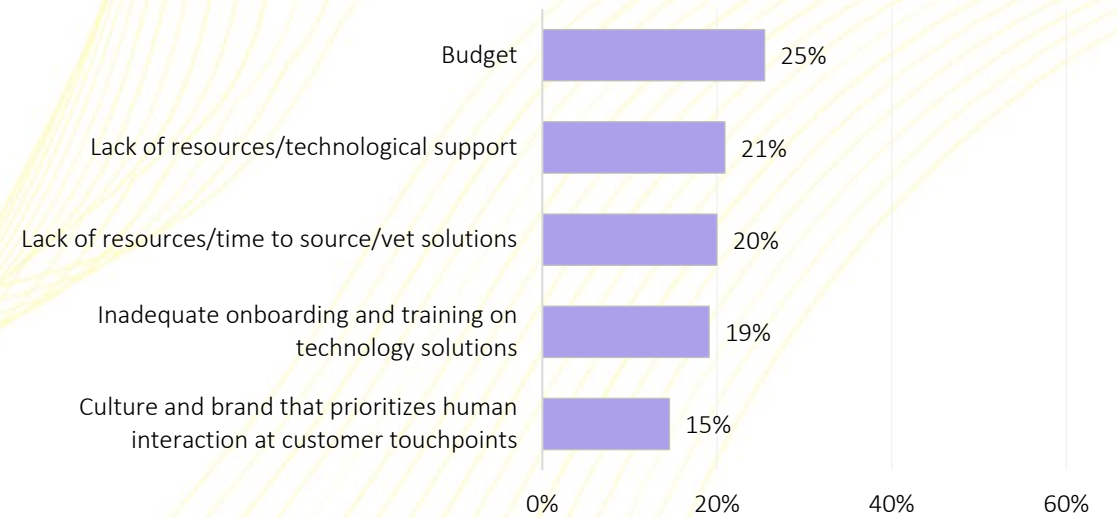
Source: ¹[Resident Retention for MF Owners and Investors 2023 Update](#), ²[Experience-led Growth: A New Way to Create Value](#), ³[2023 Multifamily Trends Guide Emily Burke, Moved](#)

Budget and Resources Considered Biggest Obstacles for New Tech Implementation

The number of obstacles faced by organizations when implementing new technology.



The most frequent obstacles faced by organizations.

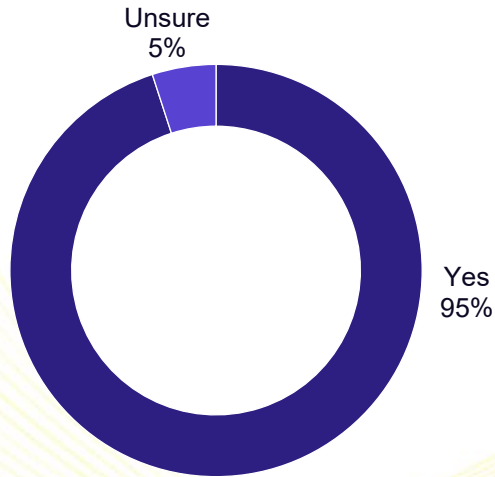


Other Verbatim Responses Related to Obstacles

- Adoption by the on-site teams and approval by the client(s).
- Change aversion to software that redefines known/trusted workflows.
- Resistance from multiple levels – hard to provide data to support all arguments.
- Lack of vendor solutions' awareness of what problem they're solving for and how they fit into the PropTech ecosystem.
- Pace – hard to keep up with all the options and how fast they come out.
- Supporting multiple PMS platforms and client databases.
- Change management internally and integration with “stack”, client alignment.
- Being fully third-party we have a challenge with the amount of solutions being onboarded to meet various client needs. It's a major workload and something we are addressing by implementing a centralized vetting process for all new tech programs/platforms/vendors.
- High talent turnover.
- Too many solution dashboards to manage and maintain.
- Lack of integration between systems.

Defined Goals and Desired Outcomes

When a new technology is added to your stack, do you define a goal or desired outcome?



Goals when implementing new technology (Ranked)



Other Verbatim Responses Related to Goals

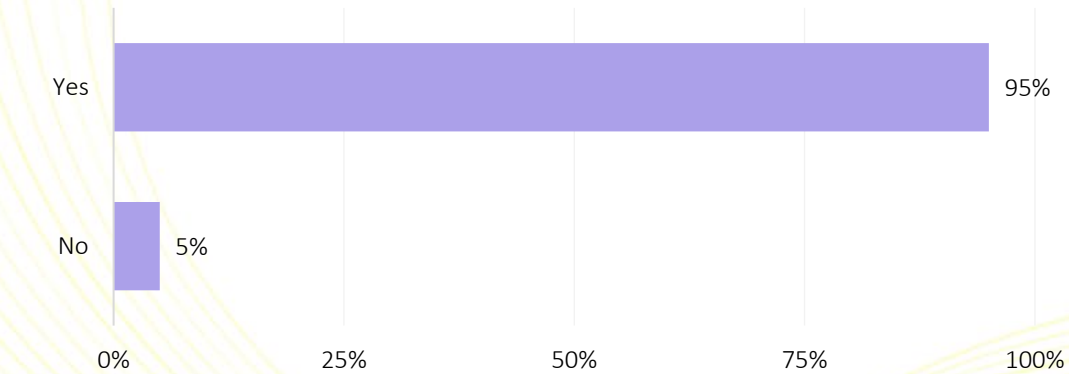
- Integration capabilities and consolidating tech stack.
- Peace of mind thanks to measurable (and predictable) performance at key stage gates along the lead-to-leave prospect/resident experience.
- Recruiting: Does our stack provide the opportunity to attract talent from additional candidate pools.
- Brand differentiation.

- Employee Morale.
- Impact on site team members.
- How we compare to industry peers using like technology.
- In general, ROI.
- Creating “efficiencies” for our team member’s time is very valuable to us.

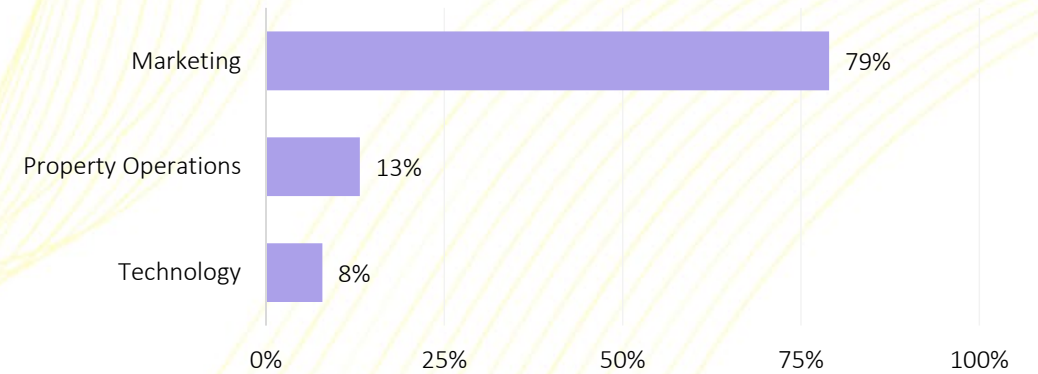
Customer Experience (CX) Technology Results Preview

Digitally-Supported Tour Solutions: Virtual Tours of Units and/or Floorplans

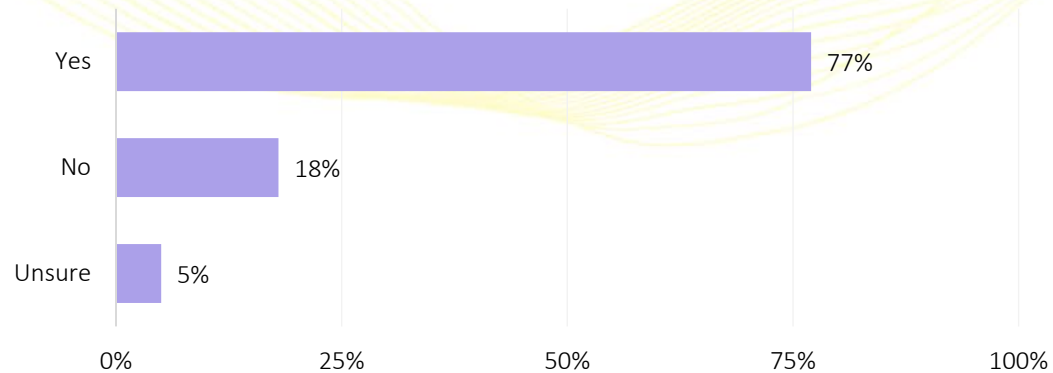
Do you offer virtual tours of units and/or floorplans?



Which department is the primary manager of the technology solution?



Are you measuring engagement with this technology?



How would you rank customer engagement with this technology?



Digitally-Supported Tour Solutions: Virtual Tours of Units and/or Floorplans

Virtual tours of units and floorplans offer a digital or online experience that allows a prospect to explore and visualize an apartment without being physically present. These tours provide an immersive and interactive way to view a potential apartment unit to rent.



CX Survey Insights

- 95% of those who responded to the survey provide virtual tours of units and/or floorplans; over half of the companies surveyed use at least two different solutions.
- The engagement level with virtual tour technology is high at 3.9 of 5; 49% ranked engagement as either a 4 (39%) or 5 (10%).



Industry Insights

- “Video retains consumers at a higher rate than any other form of content and is more trackable.”¹
- According to the 2024 NMHC/Grace Hill Renter Preferences Survey Report, when asked which forms of digital content were the most valuable in their rental home search, 45% of respondents indicated interactive virtual/3D (up from 35% in 2022).²



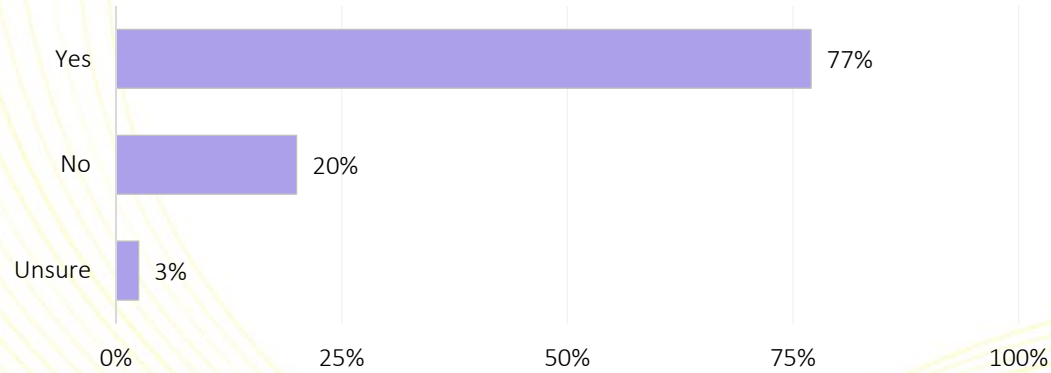
Voice of the Customer

- According to the 2024 NMHC/Grace Hill Renter Preferences Survey Report, 27% of respondents rented an apartment home without physically visiting the property in person.²

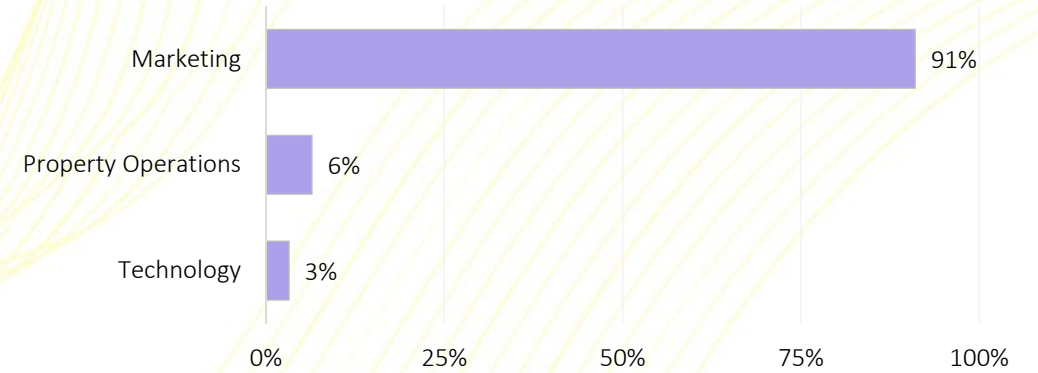
Source: ¹2023 Multifamily Trends Guide, Kristi Fickert, Realync, ²2024 NMHC/Grace Hill Renter Preferences Survey

Digitally-Supported Tour Solutions: Virtual Tours of Property Amenities

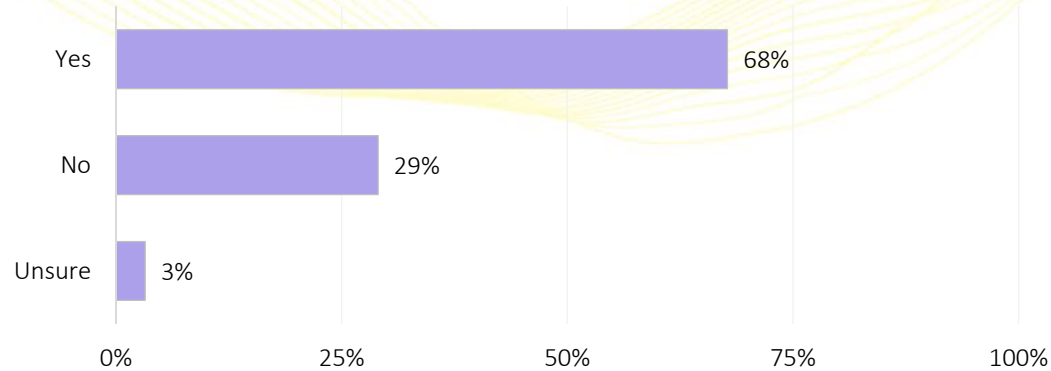
Do you offer virtual tours of property amenities?



Which department is the primary manager of the technology solution?



Are you measuring engagement with this technology?



How would you rank customer engagement with this technology?



Digitally-Supported Tour Solutions: Virtual Tours of Property Amenities

Virtual tours of property amenities offer potential renters a digital representation or simulation of the amenities throughout the property, allowing prospective renters the ability to explore and evaluate the amenities without being physically on-site.



CX Survey Insights

- 77% of respondents offer virtual tours to showcase amenities; 45% of these companies utilize at least two distinct solutions.
- Of the companies that offer virtual tours for units/floorplans and amenities, 29% opt for a different primary technology solution specifically for the amenities.



Industry Insights

- Developing video assets ranks among the top 3 tasks for which marketers wish they had more time to dedicate focus.¹
- "Advances in virtual reality deem video the ideal virtual tour technology."²



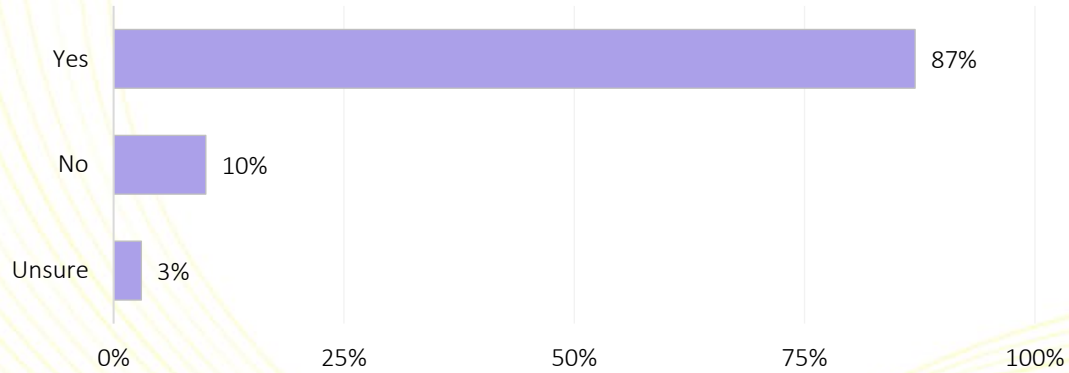
Voice of the Customer

- "Consumers want unit-level video content, personalized video content on amenities, and the like will set communities up for success."³

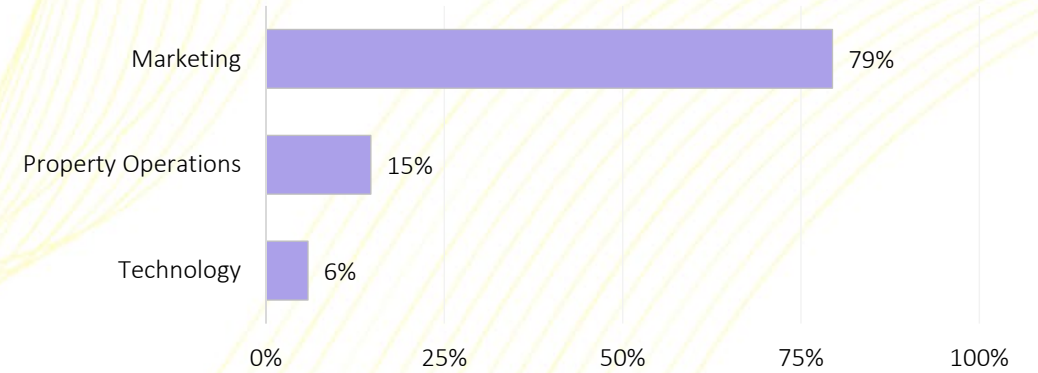
Source: ¹State of MFH Marketing Guide, ²2023 Multifamily Trends Guide, Dom Beveridge, TFT Consulting, ³2023 Multifamily Trends Guide, Jacob Carter, Nurture Boss

Digitally-Supported Tour Solutions: Tour Self-Scheduler

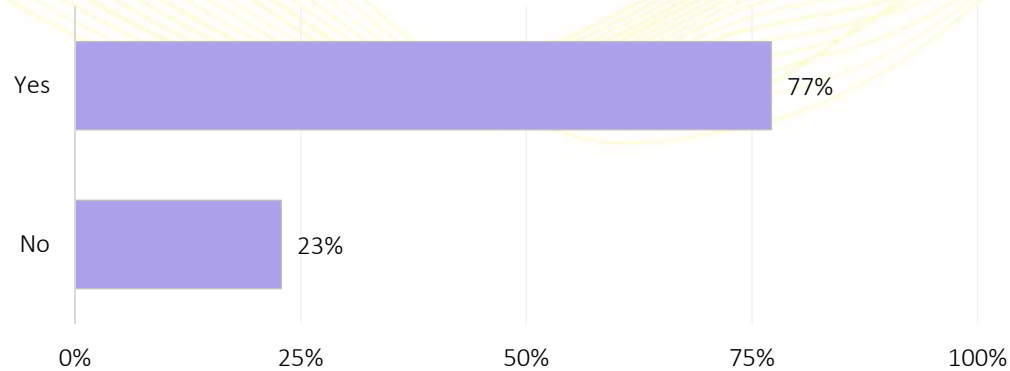
Do you offer tour self-scheduler technology?



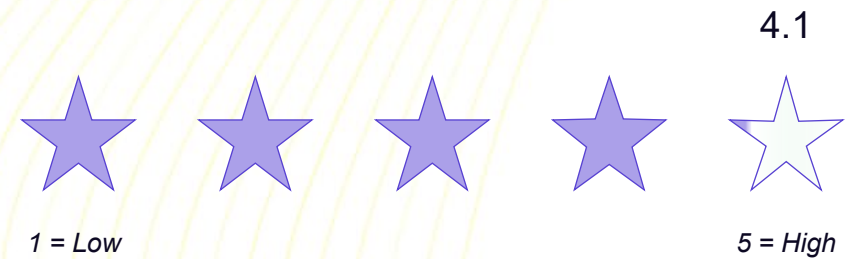
Which department is the primary manager of the technology solution?



Are you measuring engagement with this technology?



How would you rank customer engagement with this technology?



Digitally-Supported Tour Solutions: Tour Self-Scheduler

Tour self-scheduler technology allows a prospective resident to independently book property viewing appointments based on available time slots without the need for direct communication with the property staff to schedule the tour.



CX Survey
Insights

- 87% of survey respondents report offering tour self-scheduler; 40% of companies are using 2 or more technology solutions.
- Of the survey respondents, the Owner & Operators have the highest adoption rate of tour self-scheduler while 3rd Party Managers report having the lowest adoption rate.



Industry
Insights

- "To maintain both efficiency and beneficial connections with renters, property managers will need to find a balance between technology (which lowers workflow expenses) and human interaction (which strengthens renters' relationships)."¹



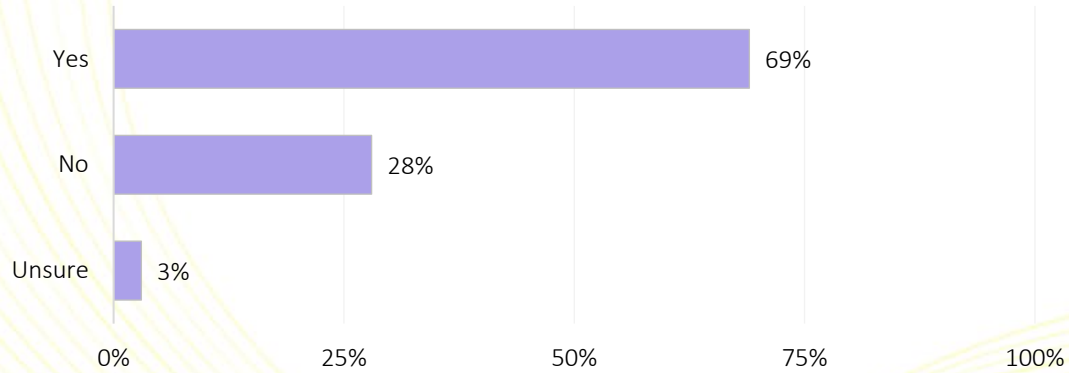
Voice of the
Customer

- "Renters are increasing their expectations around flexibility and convenience".²

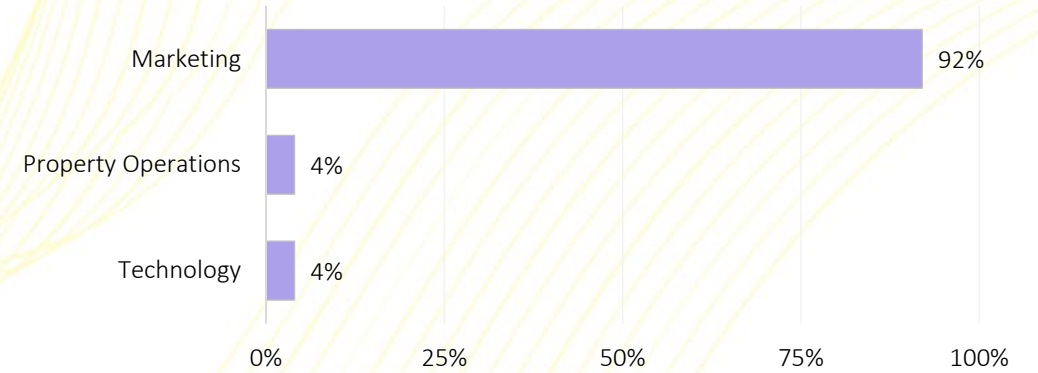
Source: ¹[Coping with 2023's Multifamily Headwinds](#), ²[2023 Resident Experience Management Report \(Zego\)](#)

Digitally-Supported Tour Solutions: Interactive Unit Availability Map

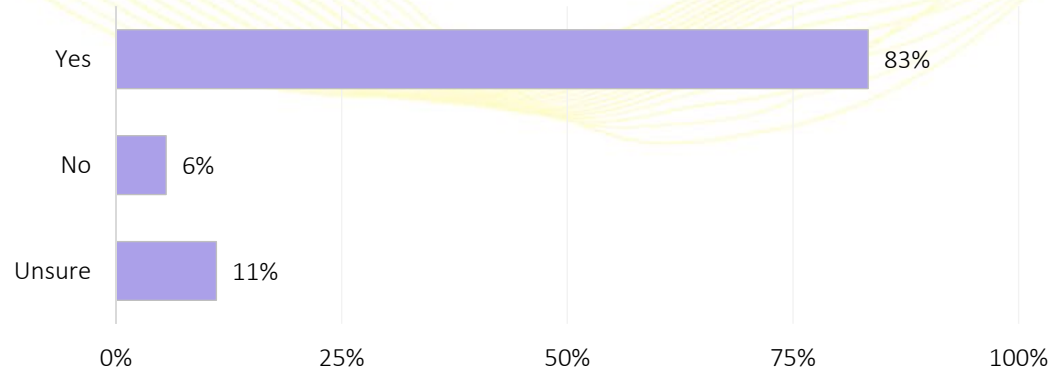
Does your website offer an interactive unit availability map?



Which department is the primary manager of the technology solution?



Are you measuring engagement with this technology?

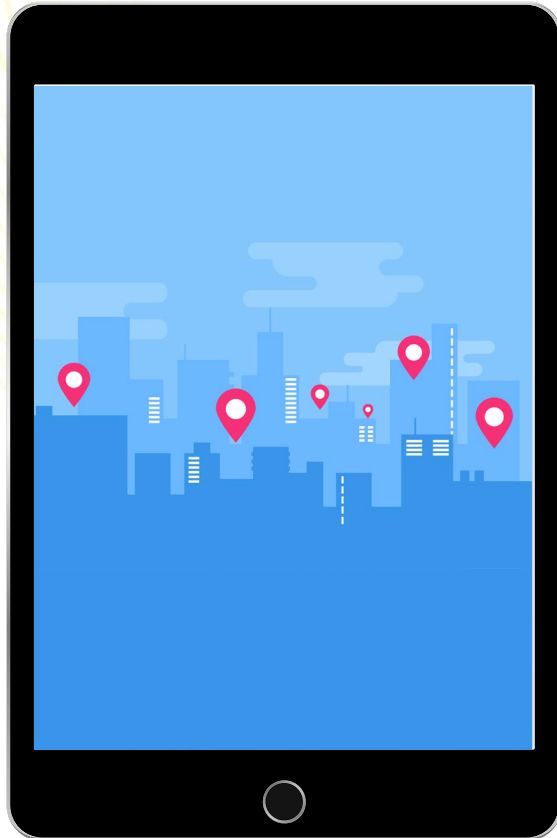


How would you rank customer engagement with this technology?



Digitally-Supported Tour Solutions: Interactive Unit Availability Map

An interactive unit availability map offers prospects a user-friendly way to assess the availability, location and other valuable unit attributes prior to moving to the application process.



CX Survey
Insights

- 69% of respondents report using interactive unit availability maps, with 83% measuring engagement. Engagement with this technology is relatively high: 3.9 out of 5.
- Over ten (10) different metrics and methods are used for measuring engagement.
- Companies utilize a mix of analytics tools, vendor reports, and specific engagement metrics.



Industry
Insights

- Unit availability should be an early factor to consider in the search process. “It is unlikely that prospects will tolerate wasting time searching for properties with no available units.”¹



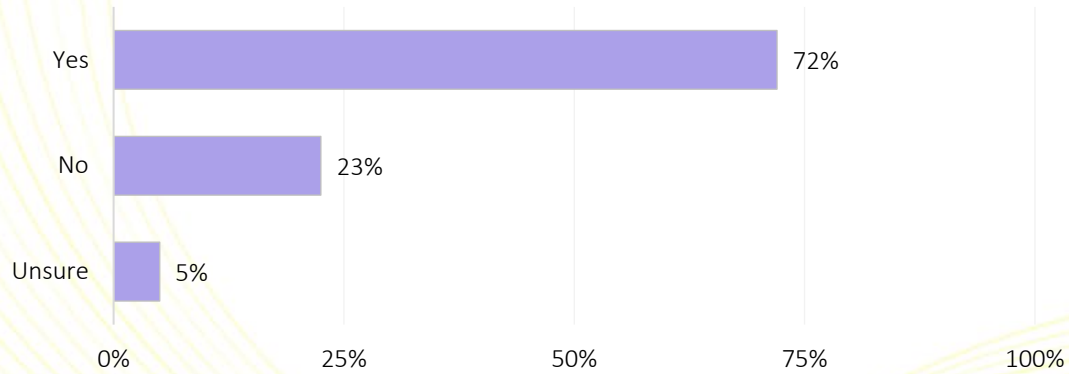
Voice of the
Customer

- “According to Apartments.com’s research, ‘The Listing of the Future,’ 80% of renters prioritize the location of the unit within a building.”¹
- According to the 2024 NMHC/Grace Hill Renter Preferences Survey Report, when asked which forms of digital content were the most valuable in their rental home search, 36% of respondents indicated unit location on a property map.²

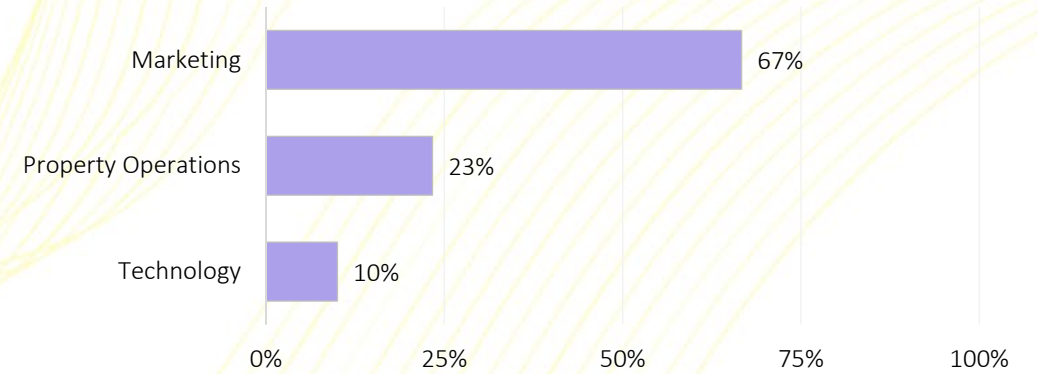
Source: ¹[Rethinking Multifamily Websites \(20for20\)](#), ²[2024 NMHC/Grace Hill Renter Preferences Survey](#)

Digitally-Supported Tour Solutions: Self-Guided Tours

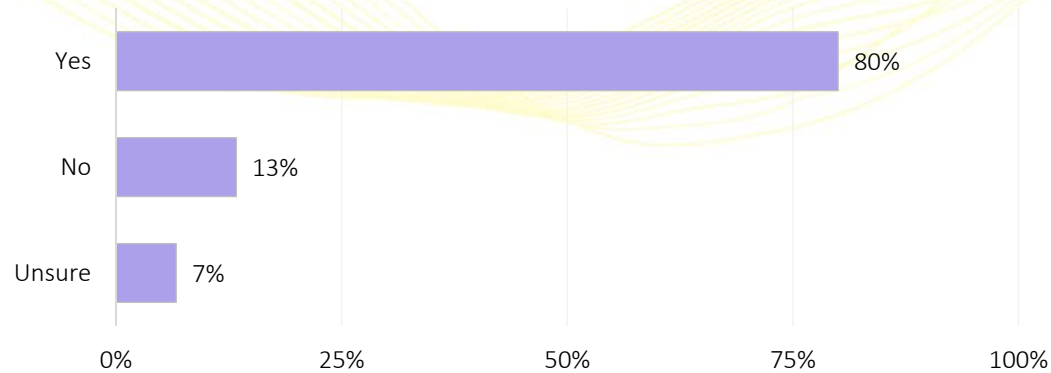
Does your company offer self-guided tours?



Which department is the primary manager of the technology solution?



Are you measuring engagement with this technology?



How would you rank customer engagement with this technology?



Digitally-Supported Tour Solutions: Self-Guided Tours

Self-guided tours provide a flexible and convenient property and unit viewing experience where a prospect can explore at their own pace, without a property staff member.



CX Survey Insights

- Self-guided tours are offered by 72% of the survey respondents, with moderate engagement.
- Owner & Operators and Large Companies (25,000-59,999 units) have the highest adoption of self-guided tours.



Industry Insights

- "With more users choosing self-serve options, property marketing must focus on directing demand toward a streamlined online application process rather than prioritizing in-person interactions."¹
- "Self-guided tours tend to be short (typically under 15 minutes), suggesting that the prospect has all the information they need before arriving at the property. If we assume that a prospect's search will normally include a physical tour, the objective should be to make the tour confirmatory rather than educational."¹



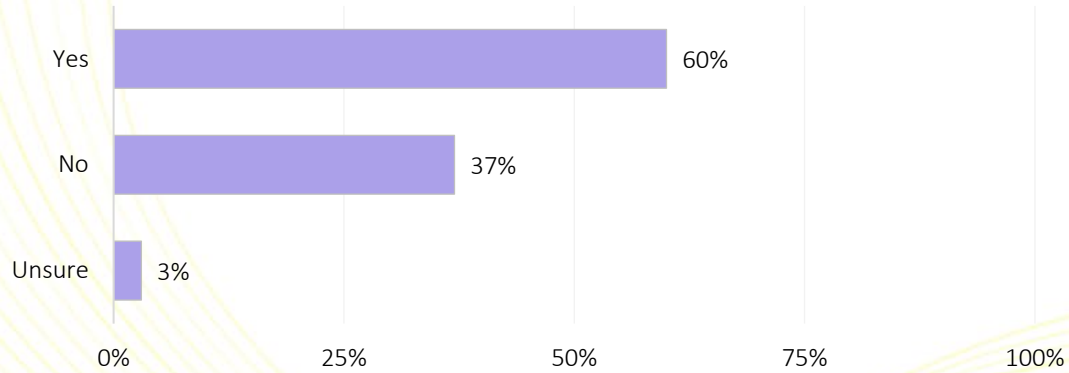
Voice of the Customer

- Renter behavior still favors in-person, guided tours. 71% of renters report they received an in-person tour with a community representative when asked about their most recent home search, 38% reported utilizing self-guided tour options.²
- Of the respondents who preferred a self-guided tour, convenience with their schedule was a highly rated benefit of scheduling a self-guided tour.²

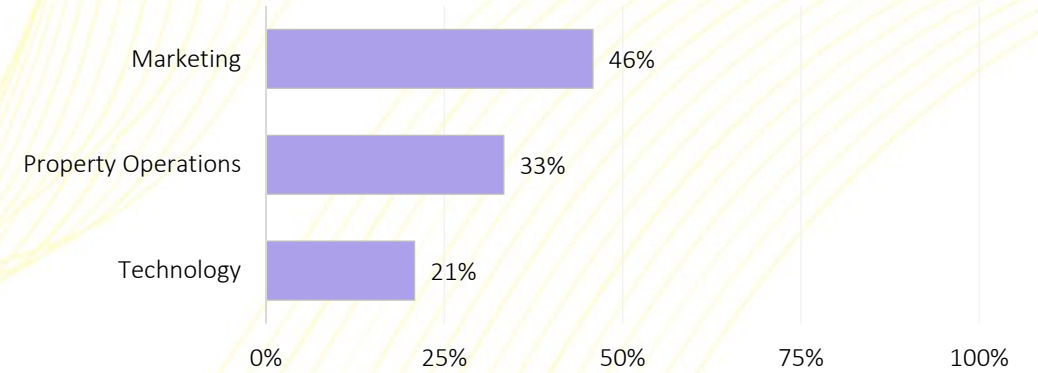
Source: ¹[Rethinking Multifamily Websites \(20for20\)](#), ²[2024 NMHC/Grace Hill Renter Preferences Survey Report](#)

Digitally-Supported Tour Solutions: Live-Video Tour with Property Representative

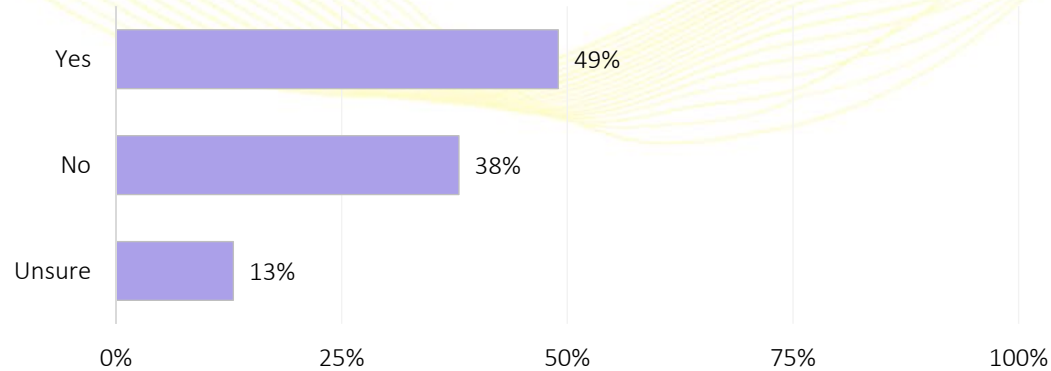
Does your company offer live-video tour with property representative?



Which department is the primary manager of the technology solution?



Are you measuring engagement with this technology?

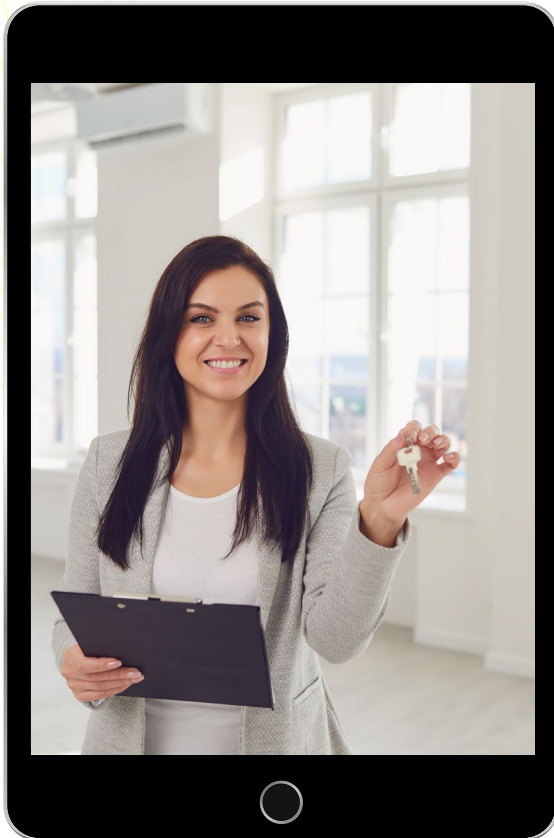


How would you rank customer engagement with this technology?



Digitally-Supported Tour Solutions: Live-Video Tour with Property Representative

A live-video tour with property representative offers a real-time, interactive, virtual tour of the property through a video call or streaming application, where the property representative guides the prospect through the physical property. This method combines the personal touch of a traditional property tour with the convenience of modern technology.



CX Survey
Insights

- 60% of survey respondents report offering live-video tours.
- Properties are using multiple technology solutions during live-video tours including live tour specific applications, personal cell phones and web meeting applications.
- 'Live-video tour with property representative' has the lowest engagement of all technology solutions surveyed.



Industry
Insights

- There is disparity between resident preference and resident behavior, according to the 2024 NMHC/Grace Hill Renter Preferences Survey Report. While only 2% of residents said they preferred live-video tours as part of their home search, 20% of residents participated in a live-video tour when searching for their most recent apartment home.¹



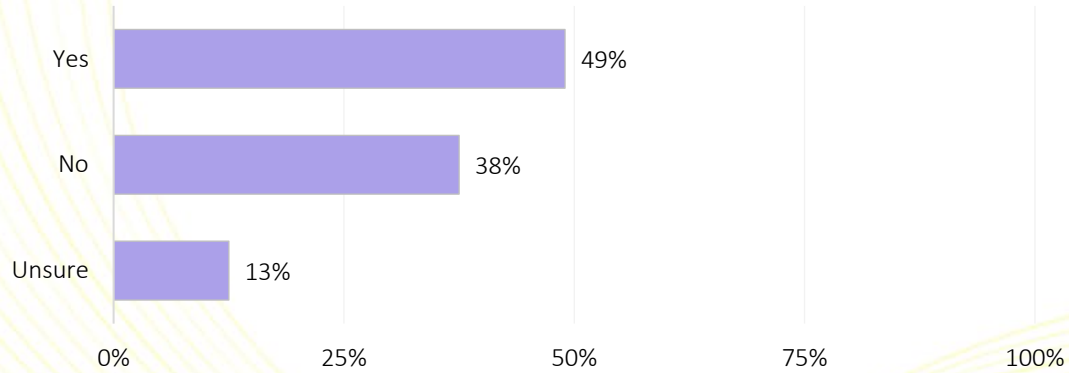
Voice of the
Customer

- According to the 2024 NMHC/Grace Hill Renter Preferences Survey Report, customers use of live video tours with a property representative has increased over 50% since 2022 while self guided tours have decreased slightly (2.6%) over the same time period.¹

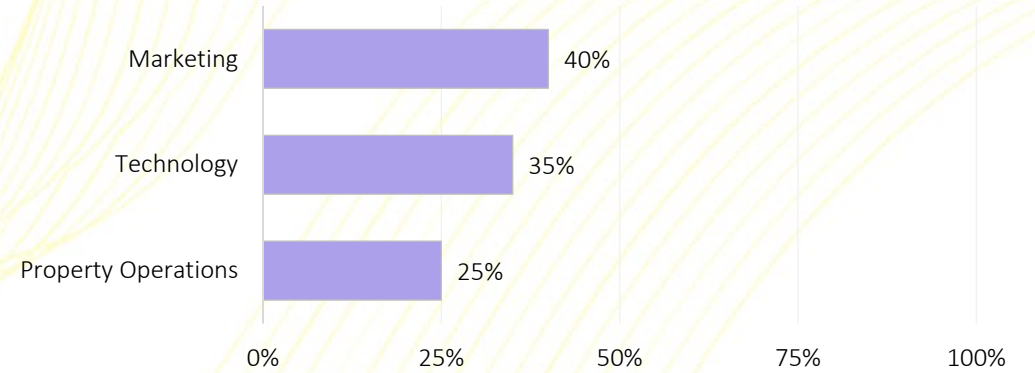
Source: [2024 NMHC/Grace Hill Renter Preferences Survey Report](#)

Digitally-Supported Resident Experience: Move-In & Move-Out

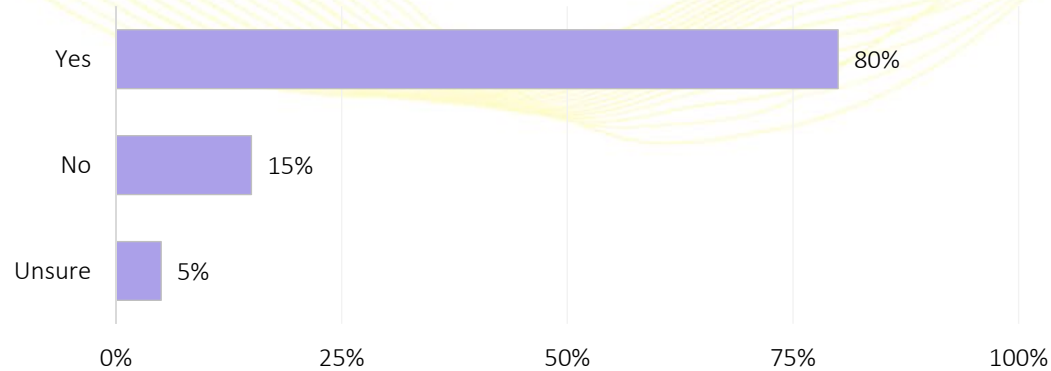
Do your properties offer resident onboarding through a move-in & move-out technology solution?



Which department is the primary manager of the technology solution?



Are you measuring engagement with this technology?



How would you rank customer engagement with this technology?



Digitally-Supported Resident Experience: Move-In & Move-Out

Move-in and move-out solutions streamline and manage the processes associated with residents moving in and out of a property. These applications ensure that all tasks associated with the process are handled efficiently by the resident and the property staff.



CX Survey Insights

- Nearly half (49%) of those surveyed provide a digital move in/move out process, and of those, 20% employ at least two different technological solutions.
- Owner & Operators and large companies (25,000-59,999 units) have the highest adoption rates.



Industry Insights

- Property managers rank facilitating smooth move-in & move-out in the top 10 challenges when it comes to resident experience.¹



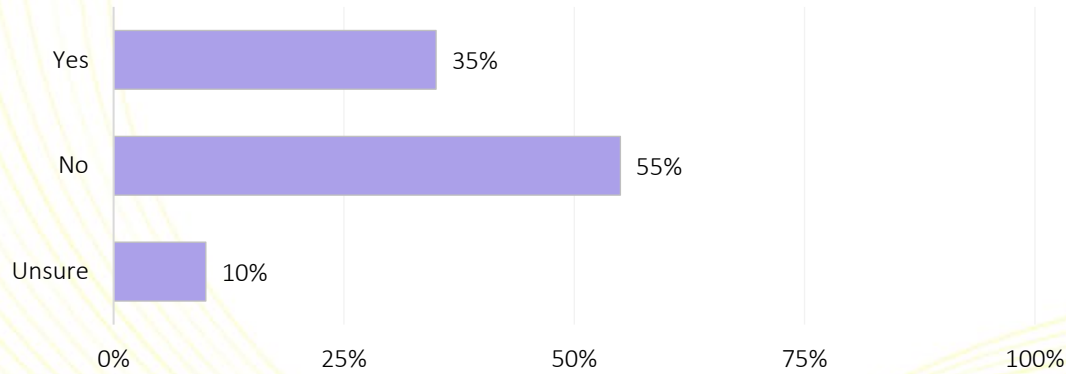
Voice of the Customer

- According to the 2024 NMHC/Grace Hill Renter Preferences Survey Report, 39% of renters say an orientation on move-in is very important and 29% say it is absolutely essential.²

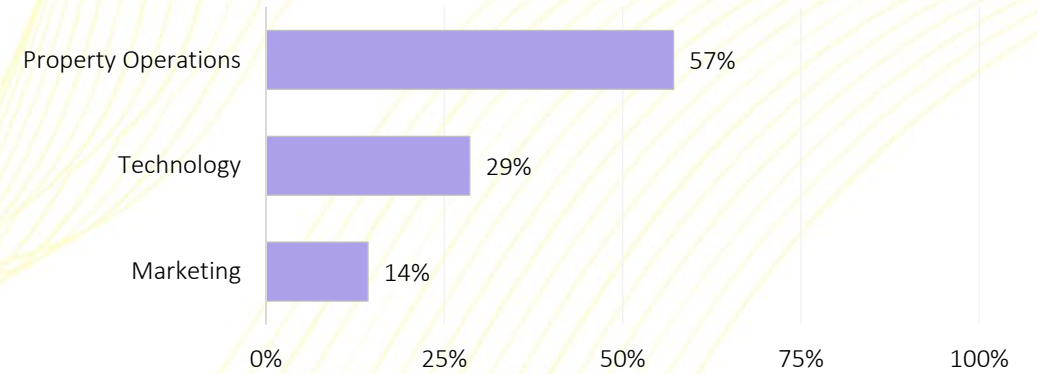
Source: ¹2023 Resident Experience Management Report (Zego), ²2024 NMHC/Grace Hill Renter Preferences Survey Report

Digitally-Supported Resident Experience: Flexible Rent Payment

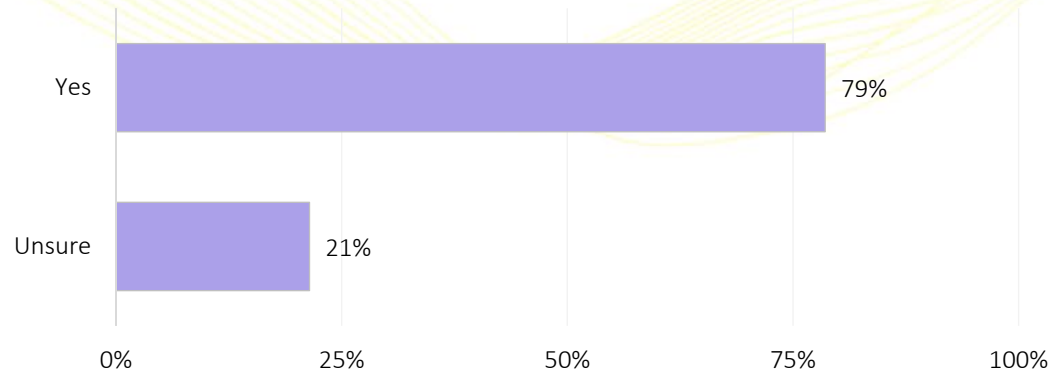
Do your properties offer flexible rent payment?



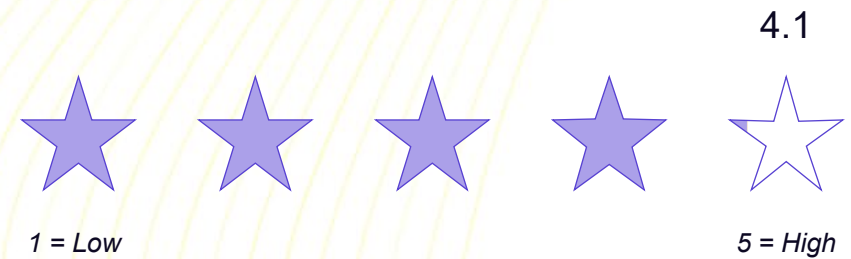
Which department is the primary manager of the technology solution?



Are you measuring engagement with this technology?



How would you rank customer engagement with this technology?



Digitally-Supported Resident Experience: Flexible Rent Payment

Flexible rent payment solutions offer rental payment options that provide renters with more adaptability and convenience than the traditional once-a-month payment structure. These solutions are valuable in catering to diverse financial situations and the preferences of today's renter.



CX Survey Insights

- 35% of the survey respondents offer flexible rent payment options.
- Engagement is ranked 4.1 out of 5; with 79% of the survey respondents measuring engagement. Most companies are utilizing vendor provided reports to measure engagement.
- Owner & Operator respondents report having the highest adoption rate.



Industry Insights

- 1 in 4 renters spend more than 50% of their monthly income on rent.¹
- 44% of property managers feel that resident expectations have increased in regard to more flexibility for lease terms and rent payment schedules.²



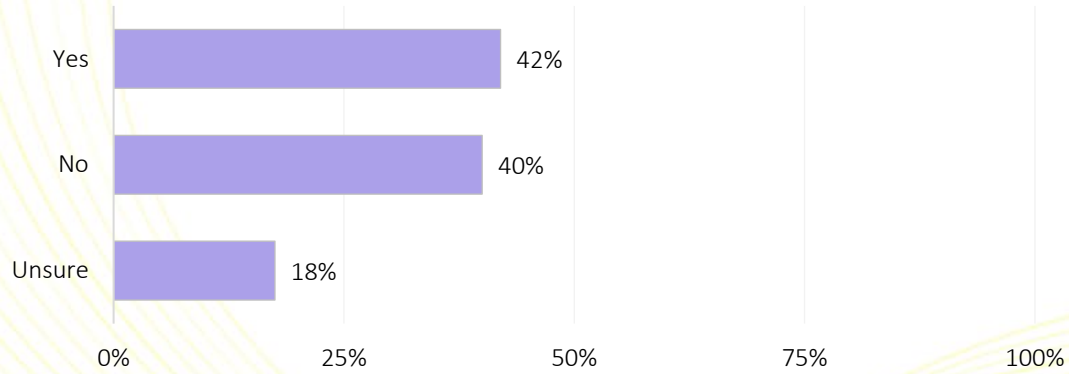
Voice of the Customer

- Renters prefer flexibility to pay rent in installments that work best with their budget and cash flow.¹
- 27% of renters responded that flexible rent payments are very important or absolutely essential to improving their current financial health.³

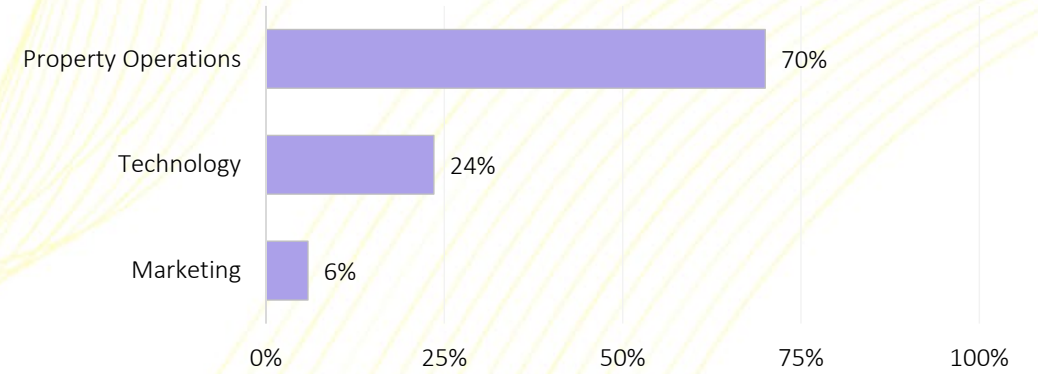
Source: ¹Zego, ²2023 Resident Experience Management Report (Zego), ³2024 NMHC/Grace Hill Renter Preferences Survey Report

Digitally-Supported Resident Experience: Self-Service Renewals

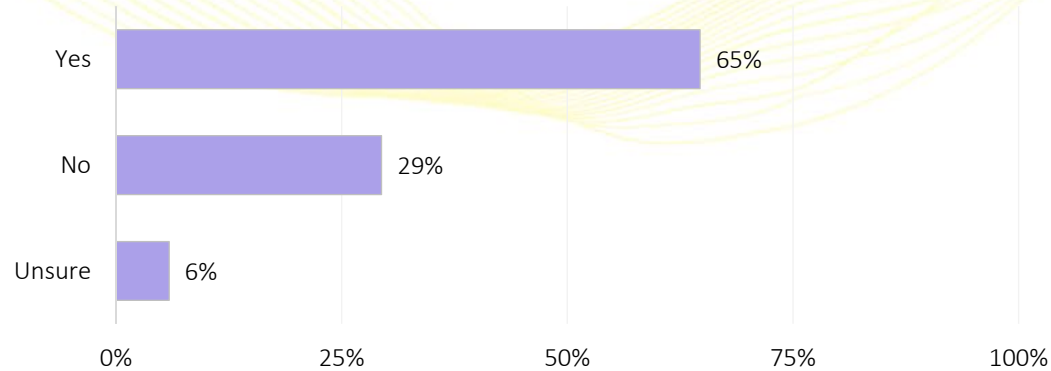
Do your properties offer self-service renewals?



Which department is the primary manager of the technology solution?



Are you measuring engagement with this technology?



How would you rank customer engagement with this technology?



Digitally-Supported Resident Experience: Self-Service Renewals

Self-service renewal solutions empower a resident to manage the process of renewing their lease autonomously. This simplifies the renewal process for the property and enhances the overall resident experience.



CX Survey Insights

- 42% of survey respondents reported using self-service renewals, with resident engagement raking 3.6 out of 5.
- Most respondents use their property management system for self-service renewals.



Industry Insights

- According to Zego's 2023 Resident Experience Management report, 7 out of 10 respondents think their resident retention rate is going to increase.¹
- Average resident retention rate for multifamily companies is 56%.¹
- Turnover costs are almost \$4,000 per resident.¹



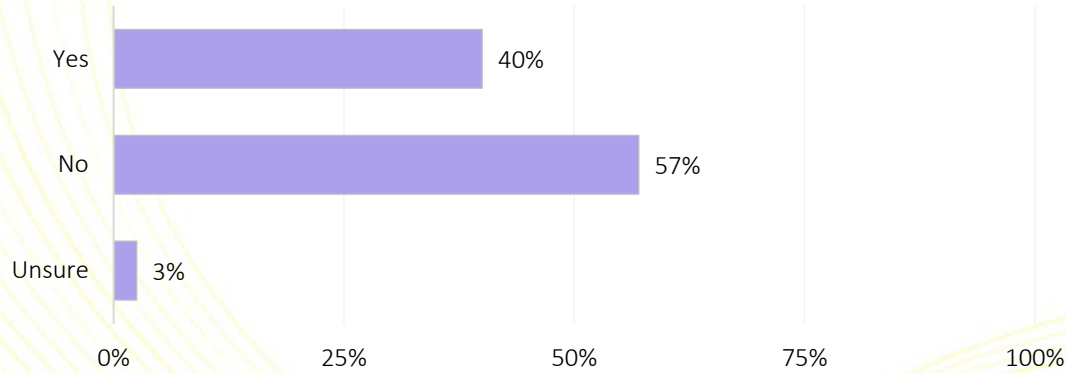
Voice of the Customer

- According to the 2024 NMHC/Grace Hill Renter Preferences Survey Report, 45% of respondents plan to renew their lease at the end of their current lease term, up from 43% last year.²
- 50% of respondents prefer an online-only renewal process.²

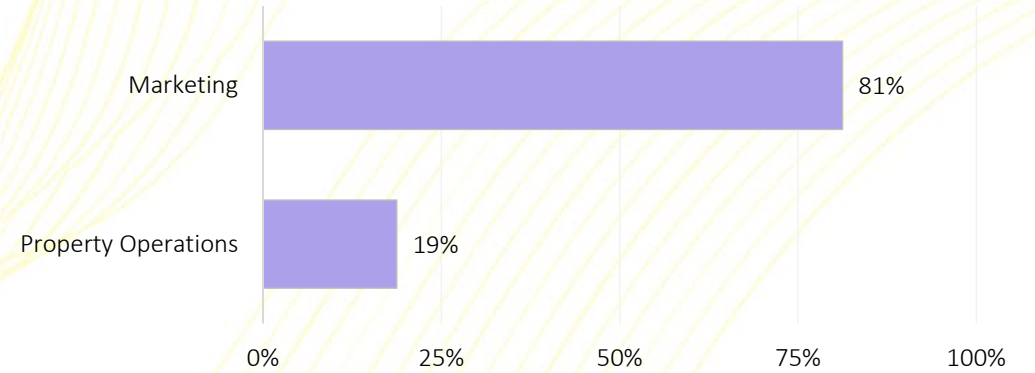
Source: ¹Zego, ²2024 NMHC/Grace Hill Renter Preferences Survey Report

Digitally-Supported Resident Experience: Resident Reward Solutions

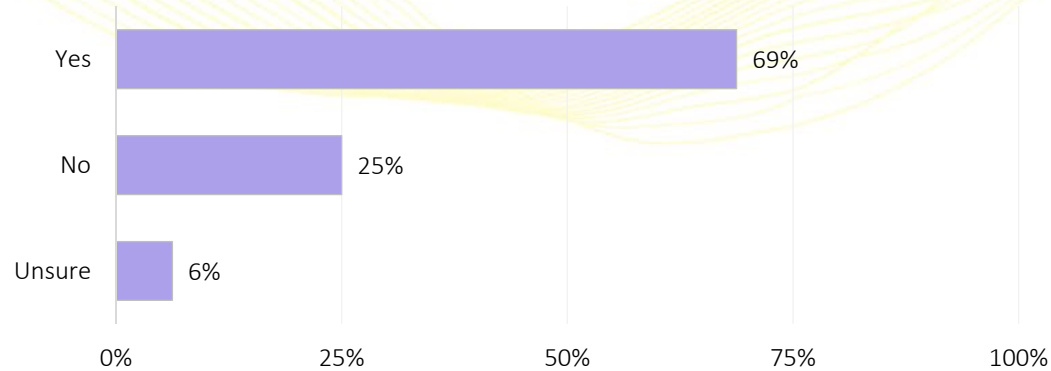
Are you offering resident reward solutions?



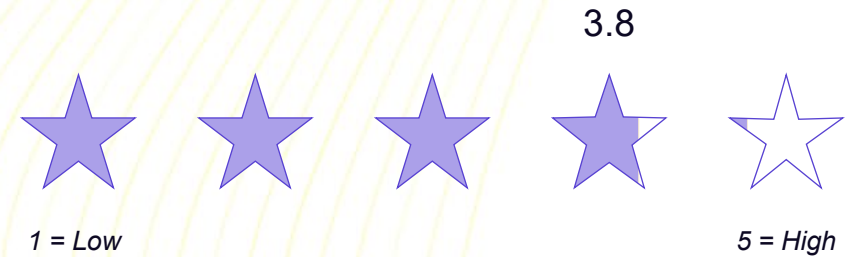
Which department is the primary manager of the technology solution?



Are you measuring engagement with this technology?



How would you rank customer engagement with this technology?



Digitally-Supported Resident Experience: Resident Reward Solutions

Resident Reward Solutions are platforms that incentivize and reward residents for various actions behaviors or milestones related to their tenancy. The goals of these solutions is to enhance resident satisfaction, encourage lease renewals, and strengthen the landlord-resident relationship.



CX Survey
Insights

- 57% of companies do not offer self-service resident reward solutions, although the companies that do utilize this are measuring their engagement at 69%.
- 13% of companies employ more than one resident reward solution.
- Large (25,000-59,999 units) and very large companies have the highest adoption rate.



Industry
Insights

- Despite the extra effort incentive programs require to set up, apartment owners and managers who have established them think they help create resident loyalty that can increase renewal rates.¹
- Resident rewards are often less costly than one-time incentives.¹



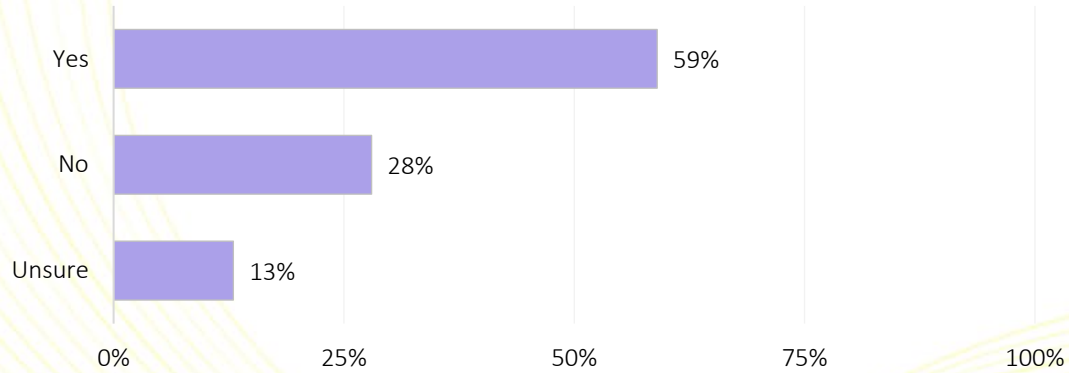
Voice of the
Customer

- "For residents, resident loyalty programs can help them save money, access rewards, and enjoy a better living experience. They also help them feel valued, respected, and connected to their property and community."²

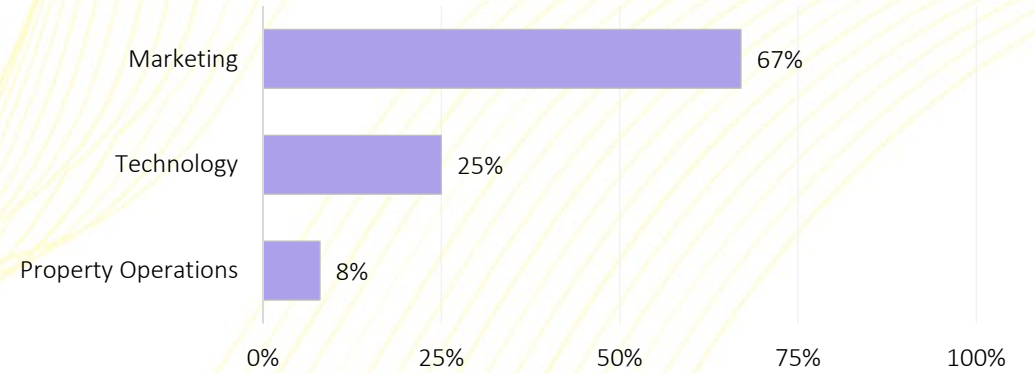
Source: ¹[Apartment Companies Find Value in Rewards Programs](#), ²[How do you leverage technology and data to optimize and enhance your tenant loyalty program?](#)

Digitally-Supported Engagement Tracking: Marketing Dashboard

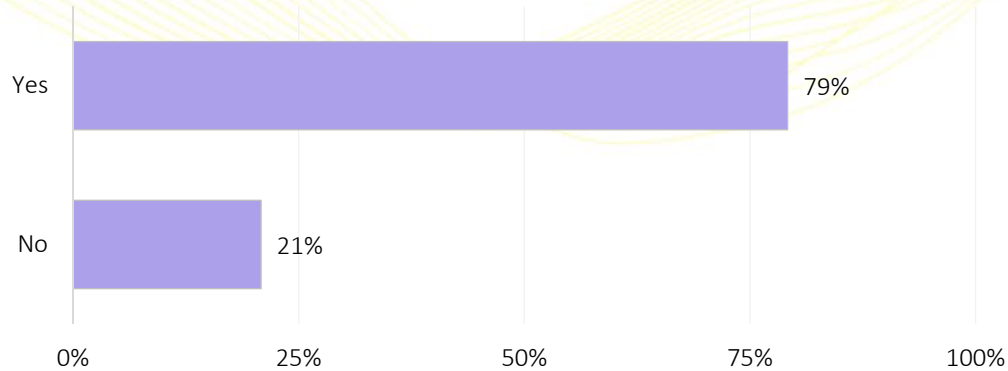
Are you utilizing marketing dashboard technology?



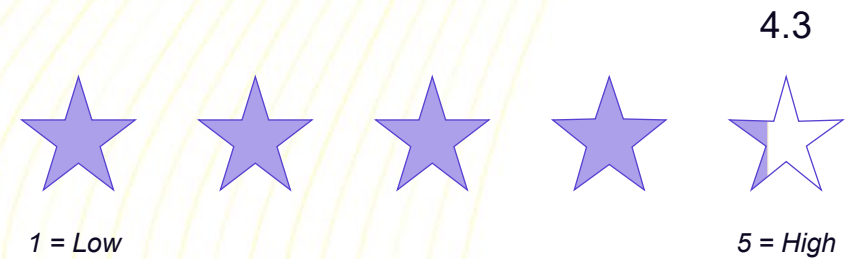
Which department is the primary manager of the technology solution?



Are you measuring engagement with this technology?

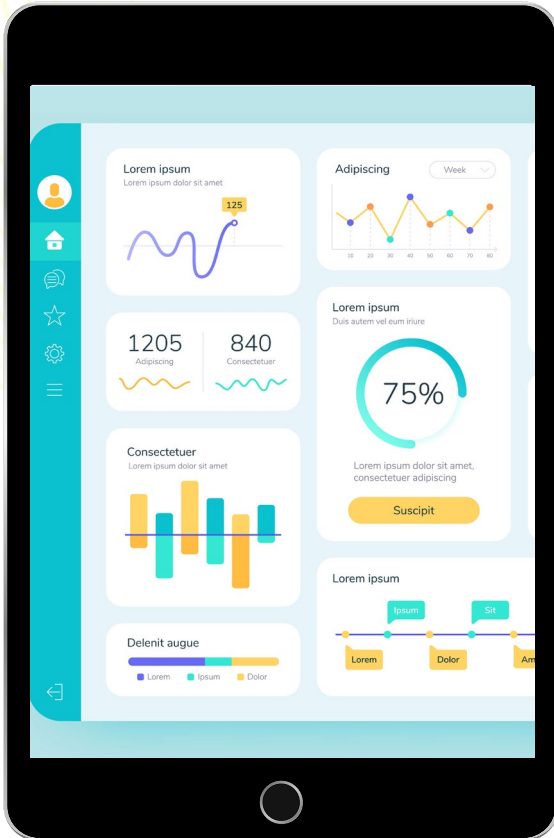


How would you rank customer engagement with this technology?



Digitally-Supported Engagement Tracking: Marketing Dashboard

Marketing dashboards consolidate, display and analyze marketing metrics and data related to multifamily assets and portfolios. This technology assists property owners and marketing teams in optimizing their marketing strategies, understanding customer behaviors and improving occupancy rates and customer satisfaction.



CX Survey Insights

- With an overall utilization of 59%, 3rd Party Managers have been slower to adopt this technology solution.
- Highest usage is among very large (60,000+ units) and medium-sized (10,000-24,999 units) companies.
- Overall high team member engagement at 4.3 out of 5 with various measurement tools/metrics used, including login activity, reports and analytics, and user traffic.



Industry Insights

- By centralizing marketing data, property teams can gain a better understanding of their data and identify areas where they can improve operations and the overall resident experience.¹
- "Many organizations appear to be missing out on wholistic attribution models that reflect how multiple channels work together to impact leasing results."²



Voice of the Customer

- Marketing teams struggle with lead follow-up and personalization demands.²
- Teams feel that "not having enough time" is most common detriment to performance and rank "following up with leads" as the most time-consuming part of their role.²

Source: ¹[How Multifamily Centralization Boosts NOI](#), ²[State of MFH Marketing Guide](#)

Stay tuned for the full report with additional
Customer Experience (CX) Technology Insights.