MULTIFAMILY AMENITIES 2021

THE TOP 131 AMENITIES DEVELOPERS, PROPERTY OWNERS, ARCHITECTS, CONTRACTORS, AND BUILDERS ARE PROVIDING IN TODAY'S APARTMENT AND CONDOMINIUM COMMUNITIES

SPECIAL REPORT: COVID-19'S IMPACT ON AMENITIES
NEW FOR 2021! 'SMART CONNECTIVITY SYSTEMS'

FROM THE EDITORS OF *MULTIFAMILY DESIGN+CONSTRUCTION*

MULTIFAMILY
DESIGN+CONSTRUCTION

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GET YOUR AMENITIES RIGHT, OR SUFFER THE CONSEQUENCES

One of the hardest decisions for multifamily teams is what mix of amenities to put into a project. A lot depends on the type of community, the geographic market, local recreation preferences, climate conditions, availability and cost of land, and of course the budget.

But getting the amenity mix right is crucial to the ultimate success of your project.

The worst thing is to install an expensive bonus item and not have anyone use it. It's not only an out-of-pocket cost, it's a lost opportunity: What other "extra" would have worked better? Can the problem be fixed—and at what cost?

This report builds on surveys we conducted in 2017 and 2019 and measures the responses of 342 multifamily housing professionals to their use of 131 perquisites—including "smart connectivity systems."

ALL THIS HAS BEEN COMPLICATED by the Covid-19 pandemic. So we asked respondents how their amenities were affected by the pandemic. We learned that many property managers closed fitness centers, pools, playgrounds, and game rooms, at least temporarily.

Other respondents removed some amenities, pushed activities outdoors, or made simple modifications, such as placing plexiglass "shields" between pieces of fitness equipment.

However, more than half said they had made no changes, either because the work was too far along, or because they were just going to weather the storm.

Long term, the pandemic raises growing concerns about designing multifamily housing—including the amenities—to benefit occupiers' health and wellness.

Please feel free to contact me. I welcome your feedback.

ROBERT CASSIDY, EDITOR
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EXECUTIVE SUMMARY

KEY FINDINGS

- **Despite the Covid-19 pandemic**, most multifamily developers and project teams kept their amenities packages intact, but nearly half took action to change their amenities mix.

- **So-called "smart connectivity systems,"** led by Xfinity Communities and Latch, are being steadily adopted in multifamily housing, but the choice of system is often left up to the owner or developer, not the AEC team.

- **For the most part,** respondents to the 2021 survey stuck closely to the adoption levels of the amenities that previous respondents (2019 and 2017) had used.

PURPOSE

- **TO MEASURE** 131 factors related to the amenities provided by multifamily developers, property owners, architects, contractors, and builders in the U.S. and Canada over the previous 24 months.

- **TO COMPARE** those findings to data from previous Multifamily Amenities Surveys in 2019 and 2017.

- **TO DOCUMENT** the impact of the Covid-19 pandemic on the amenities packages being offered by multifamily developers and their project teams.

- **TO PROVIDE NEW DATA** on the adoption of "smart connectivity" systems in the multifamily housing sector.

METHODOLOGY

1. An 11-question survey was sent four times digitally via QuestionPro over a four-week period in February/March 2021 to developers, property owners, property managers, architects, interior designers, landscape architects, builders, construction professionals, and other professionals in the design and construction of multifamily communities, almost exclusively in the U.S. and Canada.

2. The list was derived from qualified subscribers to *MULTIFAMILY Design+Construction*, Professional Builder, the SGC Horizon Multifamily e-newsletter, and selected data files. Respondents were offered the opportunity to participate in a drawing for one of 10 $10 gift cards for completing the survey. No other financial incentive was offered.

3. A total of 342 industry professionals completed the survey, compared to 249 completions in 2019 and 177 in 2017. That's a 37.3% increase in valid completions from 2019 to 2021, and a 93.2% increase over 2017. A projectable trend line of the 2021 results was reached at about 117 responses.

4. Respondents spent an average 11 minutes on the 2019 survey—a strong indication of their dedication to their respective professions and to the multifamily sector.

BY THE NUMBERS

Almost all 2021 responders (97.7%) were from the U.S., Canada, and Mexico, but a few hailed from such distant shores as Australia, Ghana, the Dominican Republic, and South Korea.

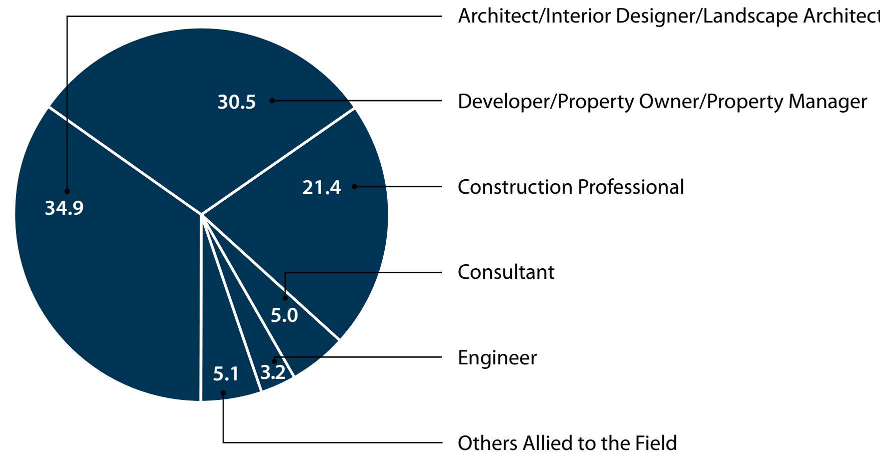
Design professionals' participation (34.9%) fell slightly from 2019 (39.7%) and significantly from 2017 (47.9%). Balancing them were developers, owners, and property managers (30.5%), up from 2019 (22.1%) and 2017 (20.5%).

The share of construction professionals (21.4%) paralleled that of 2019 (20.5%) but was well ahead of 2017's 12.6%.

"Others" included several building product manufactures, a chief technology officer, and a specification writer.

A SIGNIFICANTLY GREATER PERCENTAGE OF DEVELOPERS, OWNERS, AND PROPERTY MANAGERS TOOK PART THIS YEAR COMPARED TO 2019 AND 2017.

SURVEY RESPONDENTS BY PROFESSION, 2021



n = 342

BY THE NUMBERS

While most respondents made no changes to their amenities, many others did, such as creating "work nooks" and desk spaces in individual apartments to address the demand for work-from-home solutions.

On the health/wellness front, they installed antibacterial countertops, ultraviolet lamps, and touchless kitchen/bath fixtures. In the choice of furniture, "there may be a movement toward vinyl" for its cleanability, said Stephanie Kirkpatrick, IIDA, ASID, Director of Interior Design, Niles Bolton Associates.

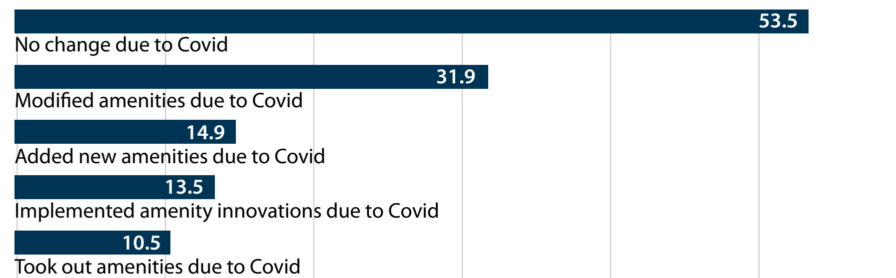
Concerns about indoor air quality prompted many to initiate HVAC upgrades and improved air purification systems.

Package centers were quickly equipped with extra cold storage lockers to handle the flood of bulk food and meal deliveries.

Developers and project teams pushed activities outdoors. One respondent was especially lucky: "We were able to add balconies to every apartment." Another installed "outdoor workstations."

Student housing developer Campus Advantage created an outdoor fitness center at its Liv+ Gainesville complex, near the University of Florida campus. "It's our most used amenity," said CA Vice President Katy Smerko.

COVID-19 IMPACT ON AMENITIES



n = 342 (2021)
Multiple responses permitted (total = 425)

> **'WE'RE LOOKING TO ADD 35-50 SQUARE FEET PER UNIT TO CREATE WORK-FROM-HOME NOOKS,'**
> — JEFF MULCRONE, AIA,
> DESIGN DIRECTOR | CHICAGO, BSB DESIGN

BY THE NUMBERS

Xfinity Communities and Latch grabbed the biggest share of the smart connectivity market, based on our respondents' experience.

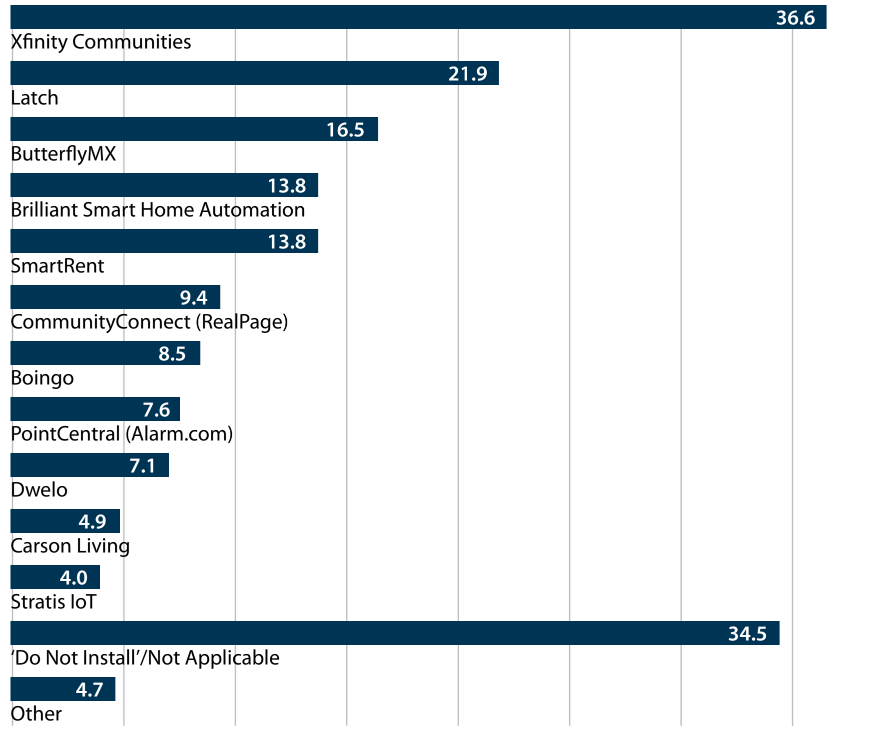
Based on the verbatim responses to this question, the choice of smart system is often made by the developer or owner and completed after the project is designed or fully constructed.

As one respondent put it, "Smart home systems tend to be selected by the client after our drawings are completed and typically do not involve us."

To learn more about smart systems, visit: *BDCnetwork.com/smartmfconnectivity2021* and *BDCnetwork.com/smartapartmenttech*.

> **MORE THAN ONE-THIRD OF RESPONDENTS (34.5%) STATED THEIR FIRMS HAD NO ROLE IN INSTALLING SMART SYSTEMS. AS ONE RESPONDENT PUT IT, 'THIS IS NOT PART OF OUR WORK.'**

NEW FOR 2021! TOP 'SMART CONNECTIVITY' SYSTEMS



n = 224 (2021)
Multiple responses permitted (total = 623)

BY THE NUMBERS

Almost all outdoor amenities tracked historical data from our 2019 and 2017 surveys, although "storage (outside the unit)" seems to have dropped off significantly, at 44.2% this year, vs. 57.5% in 2019 and 62.4% in 2017.

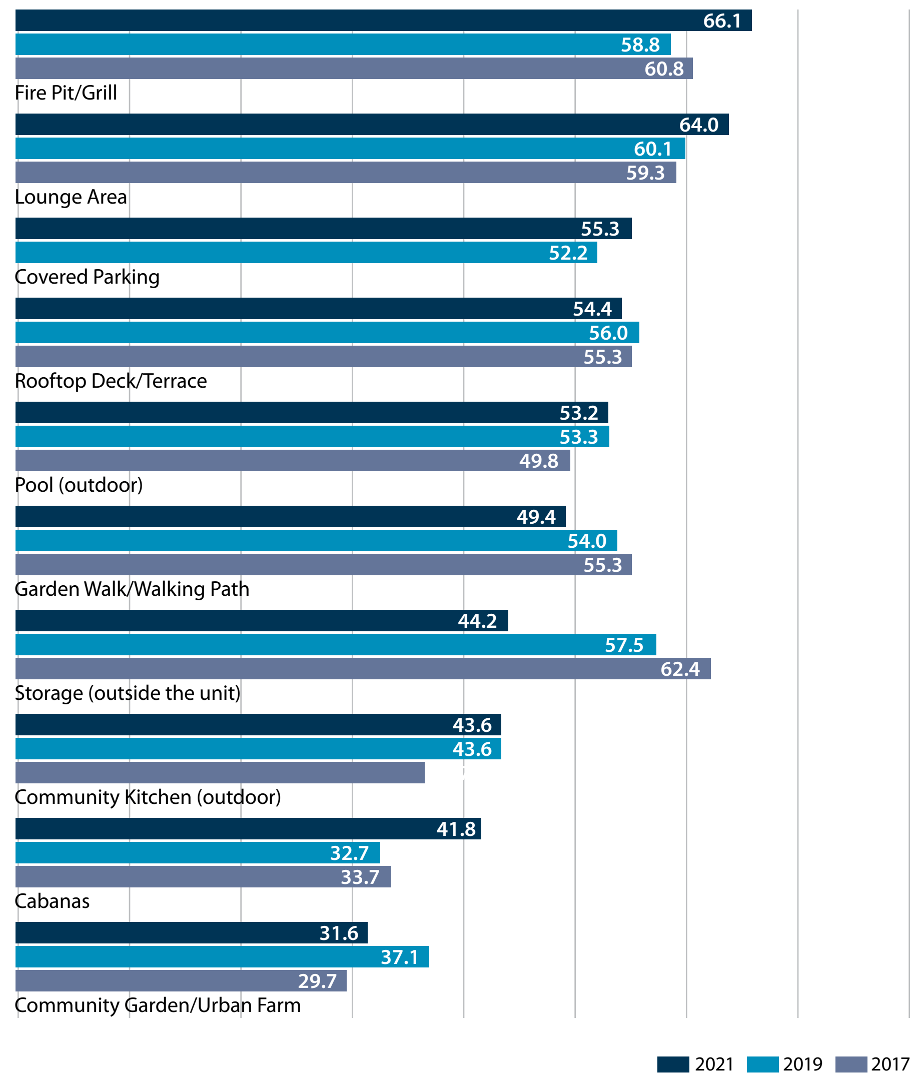
Outdoor kitchens (43.6%) and community gardens (31.6%) remained popular items.

Nearly one-fourth of respondents (24.6%) had installed a Jacuzzi, up slightly from 2019 (20.6%).

Outdoor movie screens (15.8%, vs. 14.4% in 2019) and catering pantries (12.9%, up a touch from 11.7% in 2019) also made the list.

> IT WILL BE INTERESTING TO SEE WHAT HAPPENS WITH 'AREAS OF CONGREGATION'—FIRE PITS, LOUNGES, ROOFTOP DECKS, AND POOLS—AS THE LONG-TERM EFFECTS OF THE COVID PANDEMIC SETTLE IN.

TOP 10 OUTDOOR AMENITIES



n = 342 (2021) n = 291 (2019) n = 199 (2017)
Multiple responses permitted (total = 1948)

BY THE NUMBERS

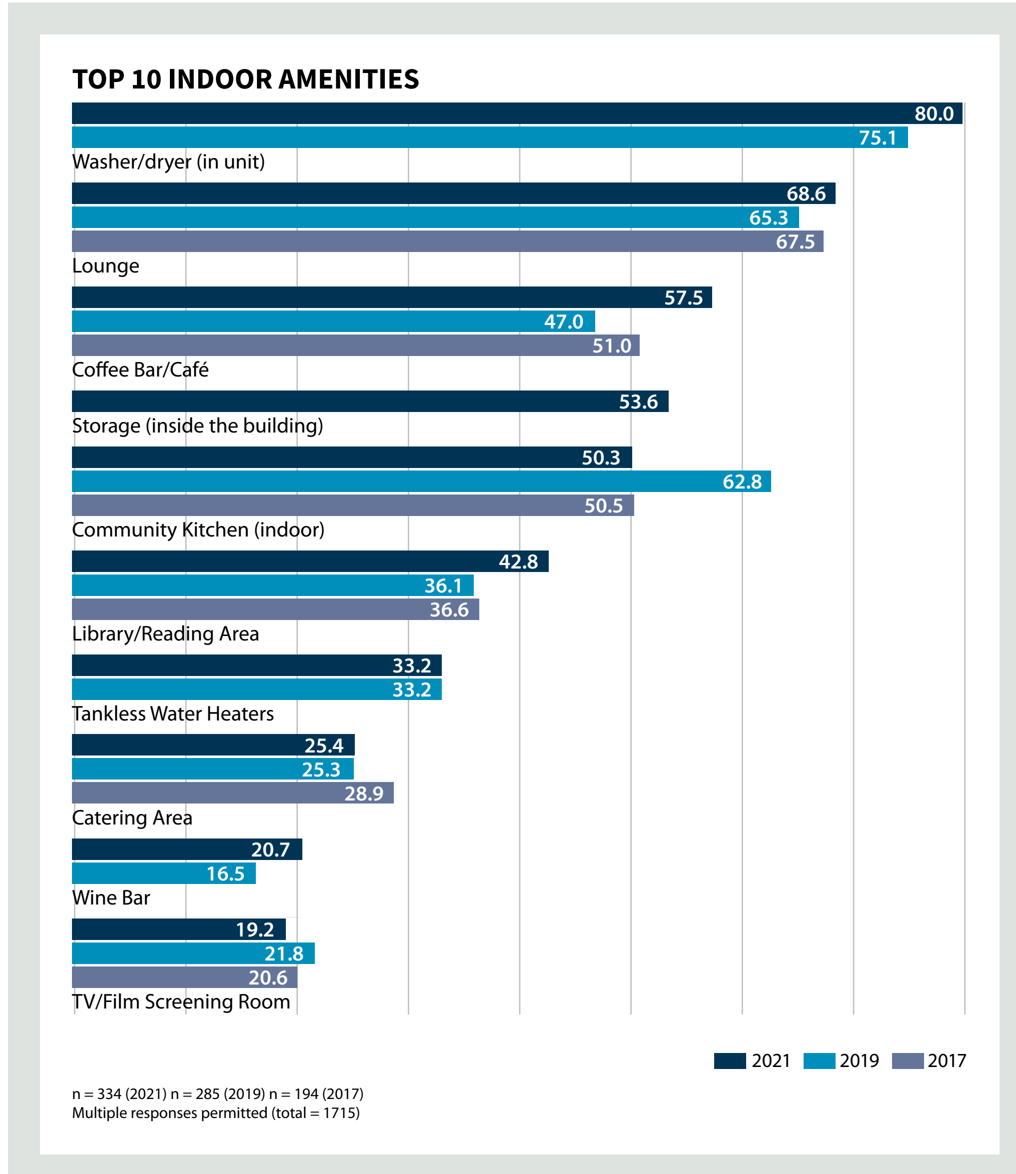
There may be some overlap with certain amenities. It's possible, for example, that "library/reading areas" (42.8%) may be co-located in "lounges" (68.6%).

Similarly, "community kitchens" (50.3%) and "catering areas" probably go together.

Other features that respondents had installed: juice bars (17.4%), wine cellars (13.2%), and music rooms (9.0%).

Only about one in seven (12.9%) had installed an indoor pool in the last 24 months. Outdoor pools are much more popular with developers.

> 'WE HAD TO REMOVE SOME THINGS, LIKE THE FREE COFFEE BAR' IN RESPONSE TO COVID, SAID A RESPONDENT.



BY THE NUMBERS

Billiards/pool stayed on top in 2021 (46.5%), while jogging/walking paths had a slight uptick (40.9%, vs. 37.8% in 2019.)

Nearly one-fourth of respondents (23.3%) used Peloton, the popular interactive exercise service. How long that will last is questionable: in 2019, Peloton announced that it would no longer supply apartment buildings with its equipment. See "Peloton to multifamily communities: Drop dead," www.BDCnetwork.com/pelotonshutoff2019.

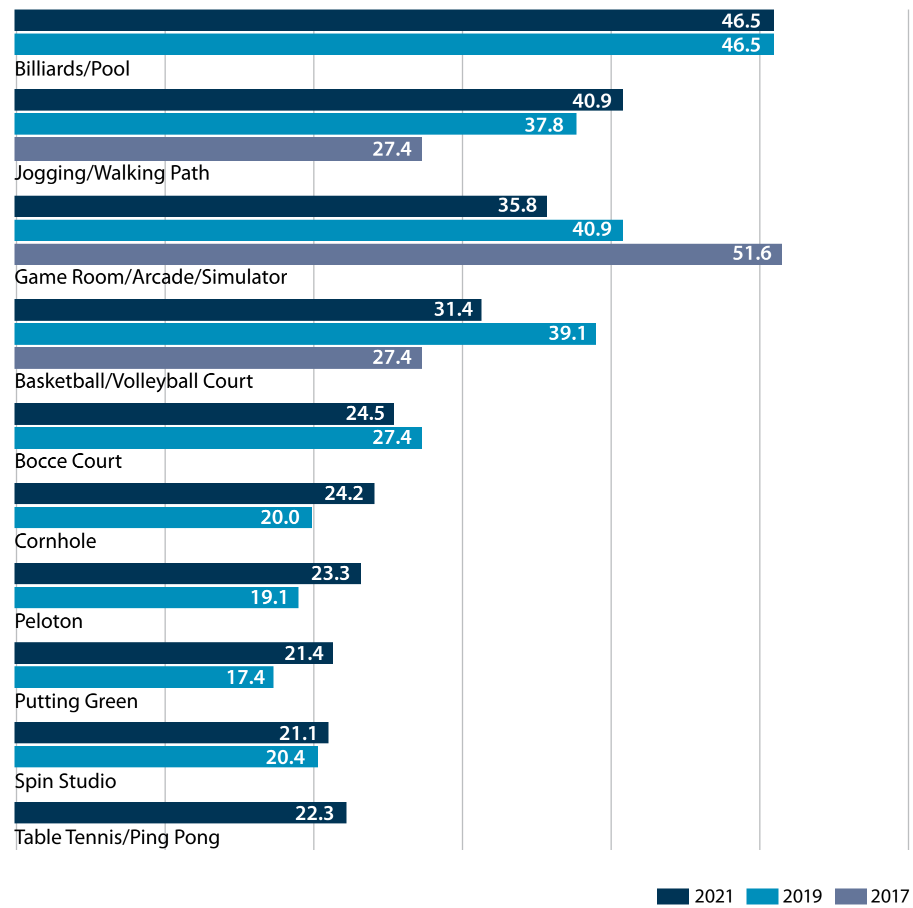
For the first time, pickleball courts (11.3%) beat tennis courts (9.1%). No idea what pickleball is? Only the fastest-growing sport in America. Check out "Pickleball, anyone?" at: www.BDCnetwork.com/pickleball-anyone.

Nearly one in six respondents (16.4%, vs. 13.0% in 2019 and 18.7% in 2017) said they included a physical therapy room in a project.

About one-tenth (10.7%) had installed a dance room—nearly as many as had built a climbing wall (11.0%, up slightly from 10.4% in 2019 and 7.1% in 2017).

Less activity reported for bowling/mini-bowling and horseshoes (both 5.3%), racquetball/squash and croquet (both 3.8%), and soccer pitches (2.5%)

TOP 10 RECREATION AMENITIES



n = 318 (2021) n = 230 (2019) n = 155 (2017)
Multiple responses permitted (total = 1286)

BY THE NUMBERS

Bicycles were top of mind for most respondents. Bike storage remained #1, at 69.0%, while nearly one-third (31.3%) had a bicycle "kitchen" (repair center). About one in seven respondents (12.7%) had a bicycle-sharing service.

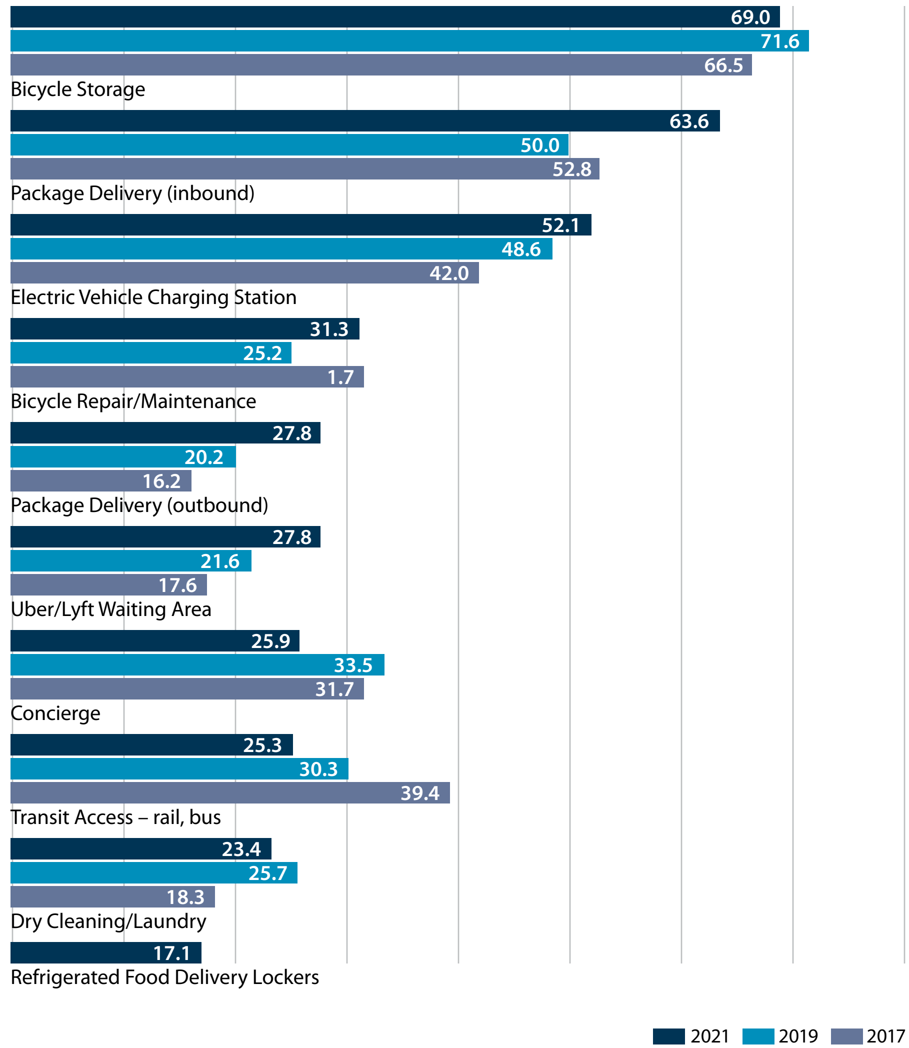
EV port installation moved into the majority (52.1%). This is sure to be accelerated by government mandates and greater adoption of electric vehicles by the public. Car wash services (16.5%, vs. 14.2% in 2019), car-share services like Zipcar (12.0% in 2021, 8.3% in 2019, 19.0% in 2017), and valet parking (8.5% in 2021, 8.7% in 2019, 12.0% in 2017) were in the low single or double digits.

Package centers, both inbound (63.6%) and outbound (27.8%), were up significantly. One respondent reported, "We added an Amazon Hub locker" where tenants can retrieve packages. More than one in six respondents (17.1%) had installed refrigerated food lockers.

Beauty services, such as hair and nail salons, registered with 12.7% of respondents, down from 15.6% in 2019 but up from 6.3% in 2017.

Respondents whose projects had water access listed boat storage at 4.4% and dock services at 3.5%.

TOP 10 CONVENIENCE SERVICES



n = 318 (2021) n = 218 (2019) n = 142 (2017)
Multiple responses permitted (total = 1330)

BY THE NUMBERS

Providing a meeting or party room seems to be a requirement for many respondents (60.7%). A small group (13.2% in 2021, 12.2% in 2019) also offered a meditation room.

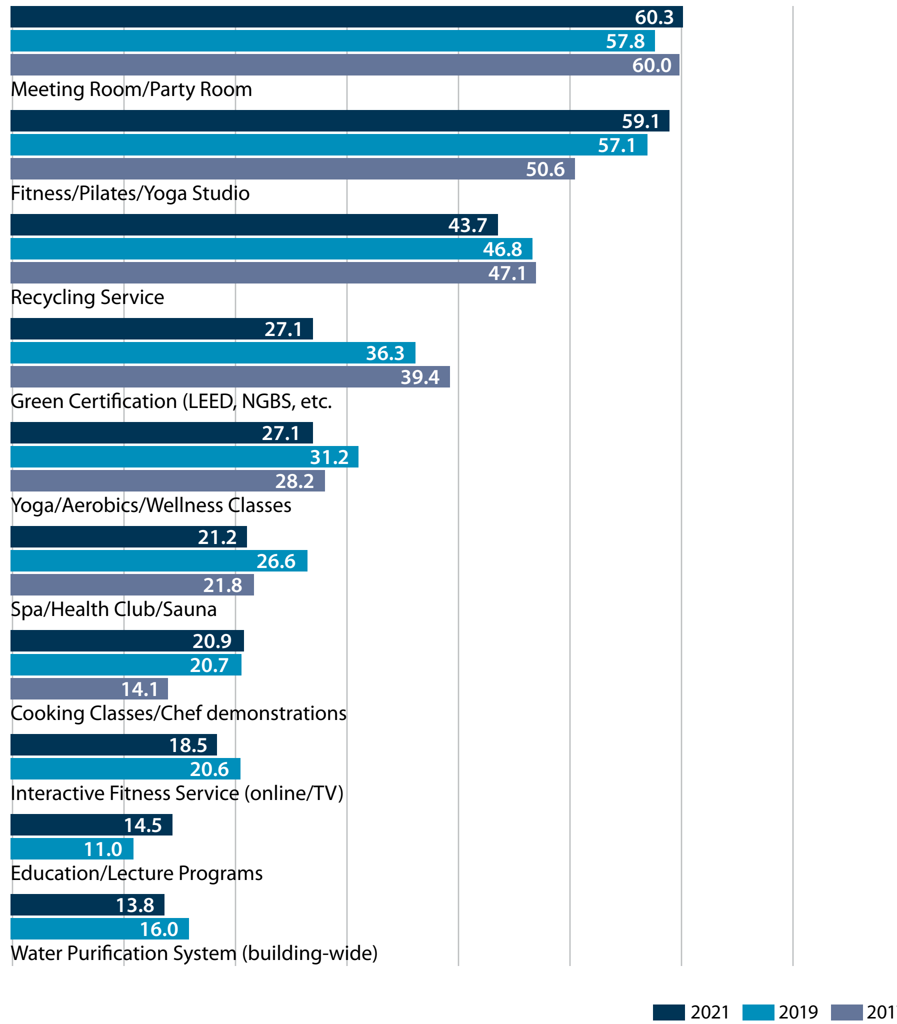
Most "quality of life" offerings clustered around fitness and wellness. There may be some redundancy between "yoga studio" and "yoga classes" and between "spa/health club/sauna" (21.2%) and "spa/massage" (13.5%).

Green certification seems to have dropped off significantly: from nearly 40% in 2017, to 36.3% in 2019, to 27.1% in 2021. Project teams may be thinking, "We'll make it as green as possible—within budget—but the client doesn't care about getting a plaque."

Despite concerns about the Covid pandemic, only 11.4% of respondents sought certification under the WELL standard or other health certification. An equal portion had planted a wellness/feng shui garden. A scattering (6.5%, down from 7.3% in 2019) offered in-house medical/dental outpatient services.

The arts have not fared well in our surveys. A fraction of respondents (9.2%) said they provided an art gallery, down from 13.1% in 2019; only 8.0% had art or music classes (9.3% in 2019).

TOP 10 QUALITY OF LIFE AMENITIES



n = 325 (2021) n = 218 (2019) n = 142 (2017)
Multiple responses permitted (total = 1509)

BY THE NUMBERS

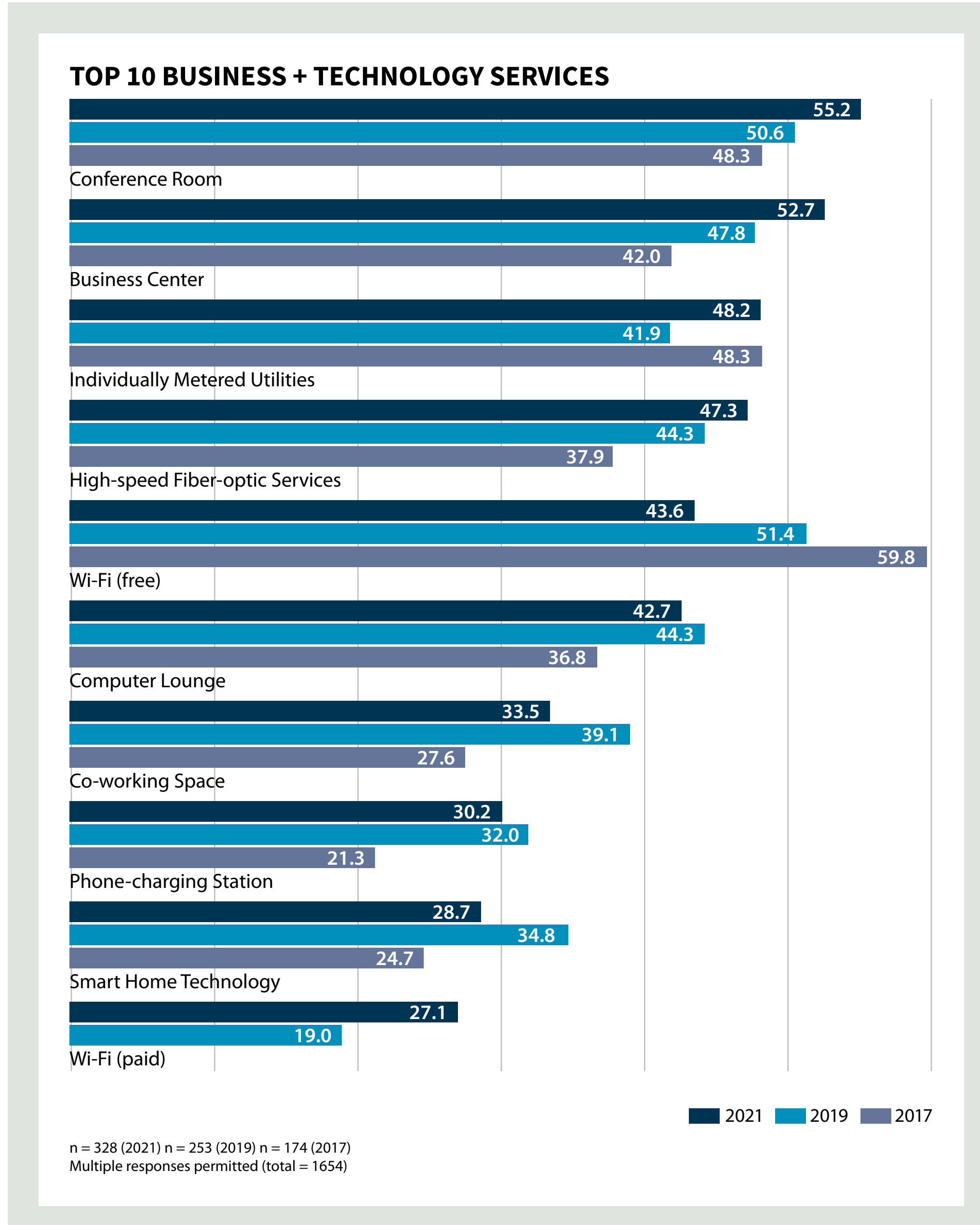
It's not inconceivable that conference rooms and business centers shared the same space in many apartment projects—perhaps along with a computer lounge or phone-charging station, or both.

Free Wi-Fi dipped to 43.6%, a major drop from 2017 (59.8%). Could that be accounted for by the jump in paid Wi-Fi (27.1% in 2021, vs. 19.0% in 2019)?

Nearly half of respondents (47.3%) had installed high-speed fiber-optic services. One-third (33.5%) said they had put co-working stations in place.

Media rooms or media centers had a good showing (26.2%), while only 11.9% of respondents said they have invested in a maker space or innovation center.

> **ONE DEVELOPER INSTALLED VIDEO DOORBELLS WITH SMART LOCK FRONT DOORS, USB CHARGING OUTLETS IN BED-ROOMS AND KITCHENS, PRE-WIRING FOR CATV AND CAT5 IN EACH UNIT, AND LED LIGHTING THROUGHOUT. *WHEW!***



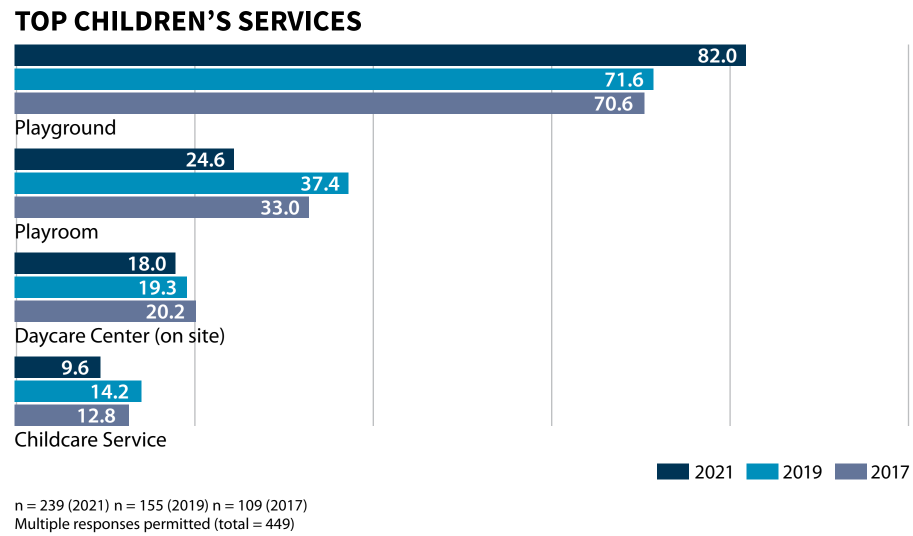
BY THE NUMBERS

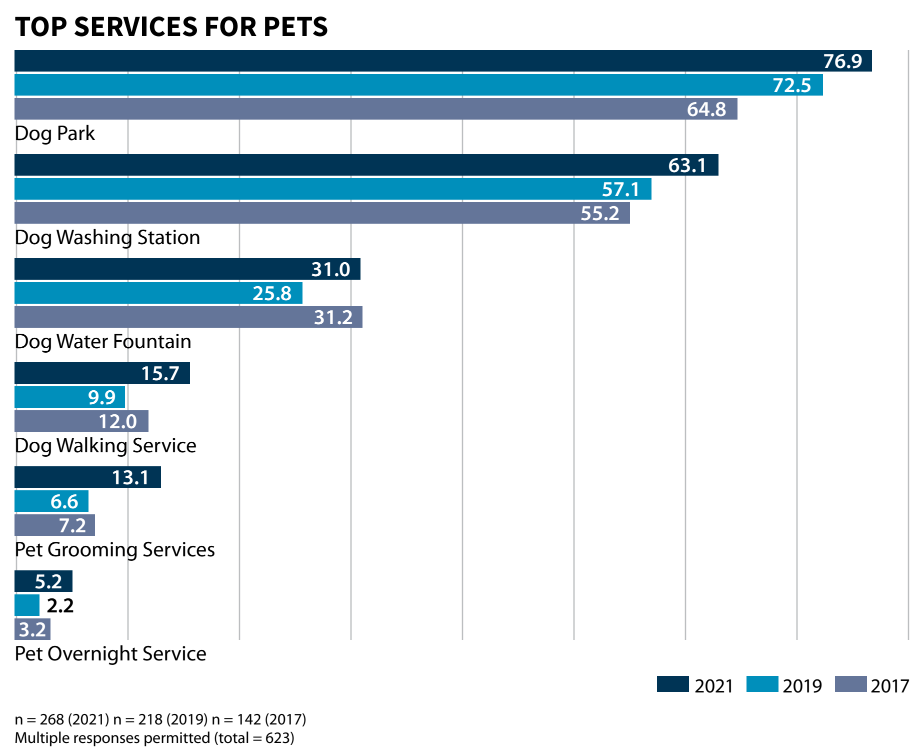
"Other"—or "none"—was often the response for children's services (30.1%) and services for pets (21.6%).

In most cases, those developing and building senior living communities and student housing would not be expected to provide services for children. "No child amenities provided," said one responder. "Not anticipated for the clients' age range." Said another, "All efficiency units, no childcare."

Some property owners—a minority, to be sure—prefer to be pet-free. "No pets allowed" and "We do not encourage pets" were typical responses. One was very assertive: "NO PETS OF ANY KIND," in capital letters.

> **'BUILDING IS NOT INTENDED FOR FAMILIES,' SAID ONE PROPERTY OWNER. 'WE DO NOT HAVE PET-FRIENDLY PROJECTS,' SAID ANOTHER RESPONDENT.**





BY THE NUMBERS

Strong response to keyless entry (71.0%) holds up for the third time, with CCTV placing #2 once again (66.8%).

A number of respondents said the security system was "not our area of expertise" or "owner installed."

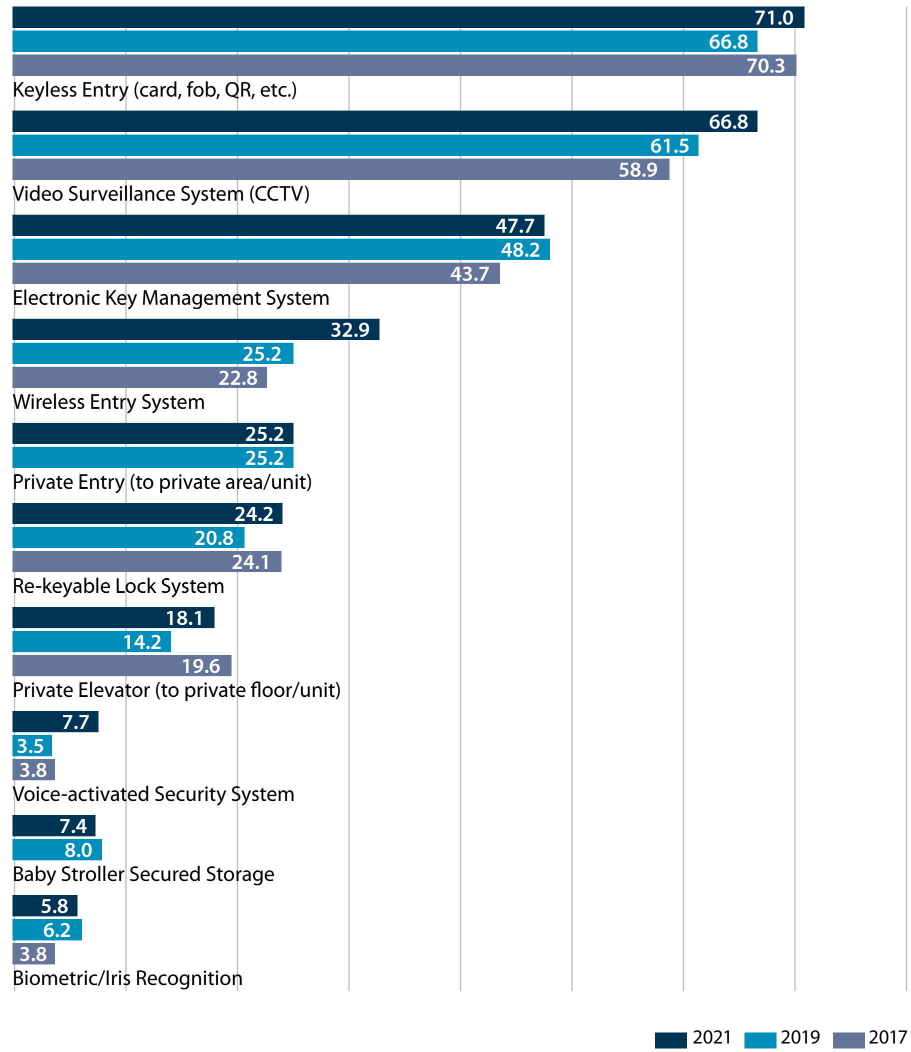
Systems mentioned by respondents: Amazon Alexa, Amazon Ring, AT&T Fiber Services, Google Nest, iRobot, Lutron, Swidget, Ving, Vivent, and Zego.

Looks like baby stroller storage (7.4%) and biometric systems (5.8%) have a long way to go to gain adoption.

For tips on CCTV systems for multifamily housing **from a world-class expert** (Mike Silva, CPP), visit: *https://bit.ly/3foMaEi and https://bit.ly/3tO2HGL.* For 38 tips from security experts, go to: *https://www.BDCnetwork.com/38securitytips.*

> AS ONE RESPONDENT NOTED, 'APARTMENTS ARE STILL MOST ATTRACTIVE IF THEY CREATE A FEELING OF "HOME."'

TOP 10 SECURITY SERVICES



n = 310 (2021) n = 226 (2019) n = 158 (2017)
Multiple responses permitted (total = 923)

BONUS QUESTION

THERE'S ALWAYS A FIRST TIME

Respondents listed all sorts of goodies they had incorporated for the first time in their multifamily communities:

- 24/7 emergency service
- Art gallery
- Chef's demonstration kitchen
- Chess tables
- Circadian lighting
- Climbing wall
- Community garden
- "Echelon Reflect" 50-inch touchscreen fitness mirror
- Electric vehicle charging ports
- Gated playground
- Hair salon
- Half-court basketball court
- High-resolution golf simulator
- Jogging trail
- Maid service
- Maker space
- Music practice room
- Pet patio
- Pickleball court
- Picnic gazebo
- "Private fleet" of electric vehicles
- Rainwater collection system
- Resistance pool
- Rooftop fenced dog run
- Rooftop running track
- Shuffleboard
- Single-user cubicles
- Sports gear room
- Urban farm
- Valet trash service
- Video arcade (>3,000 games)
- Water slides
- Wine storage
- Zipcar rentals

'RESISTANCE POOLS AND SWIM SPAS HAVE BECOME VERY SOUGHT AFTER IN STRUCTURES WHERE ROOFTOPS ARE USED AS AMENITY AND RELAXATION SPACES.'

—MANUFACTURER RESPONDENT

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