



>> Kingsley Associates

Q2 2011 Industry Trends – Multifamily

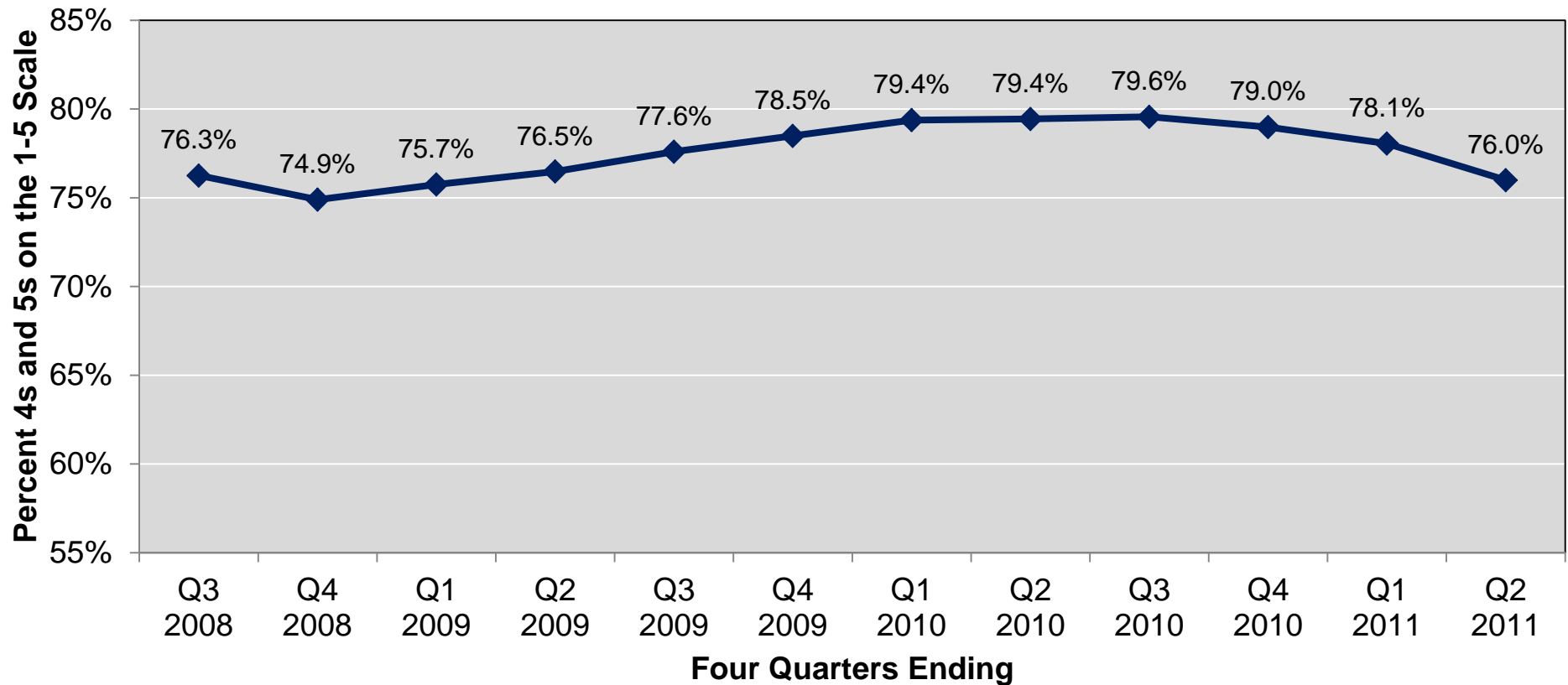
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Peggy Robinson, Vice President of Marketing
770.908.1220 ext 244 | probinson@kingsleyassociates.com



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>> Overall Resident Satisfaction



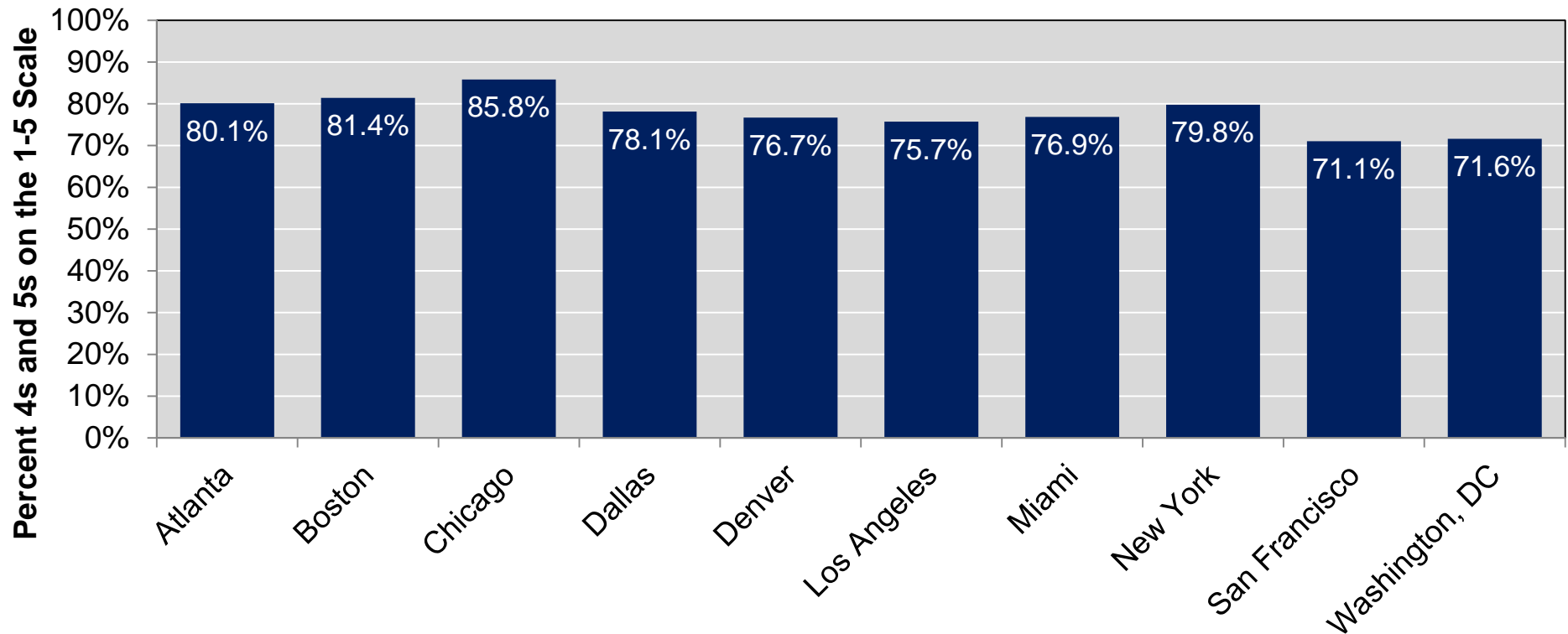
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>> Overall Resident Satisfaction by Market



Four Quarters Ending Q2 2011

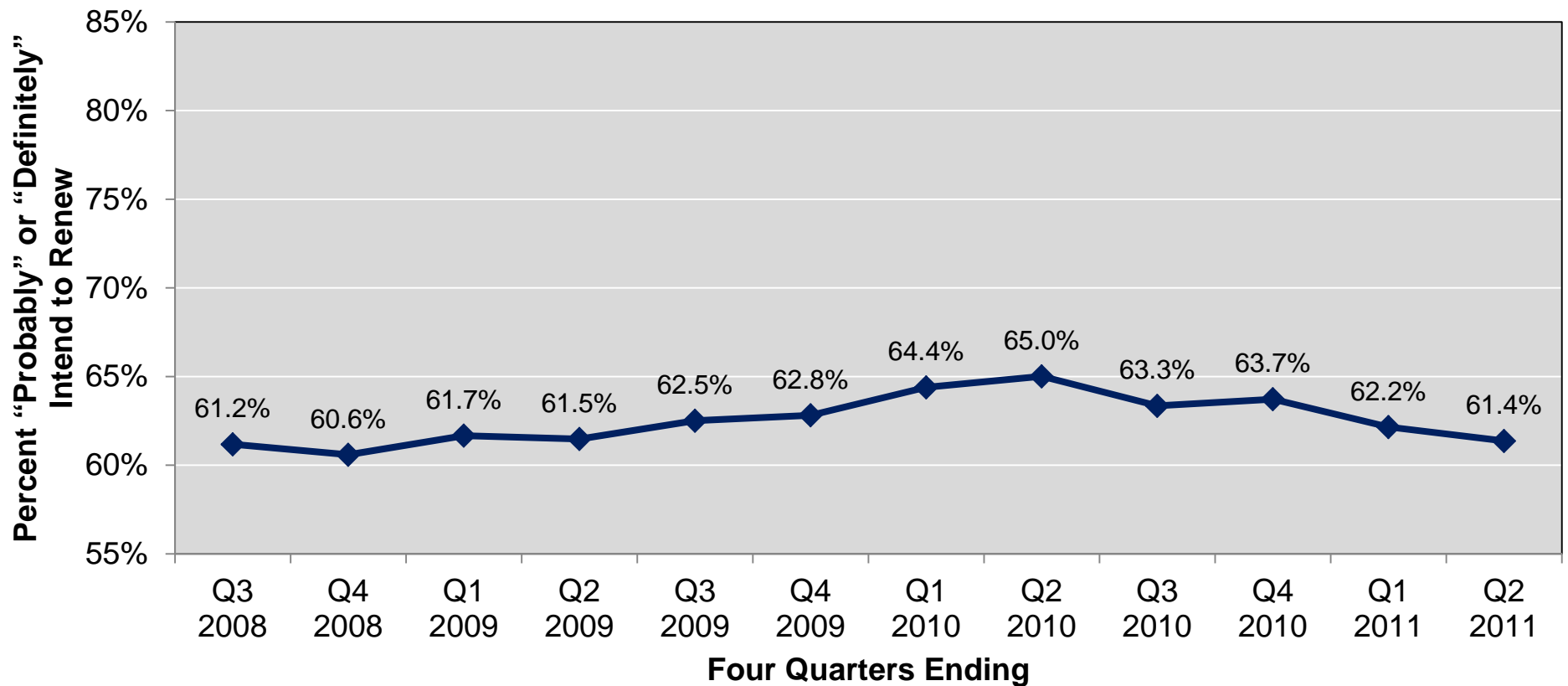
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>> Renewal Intent



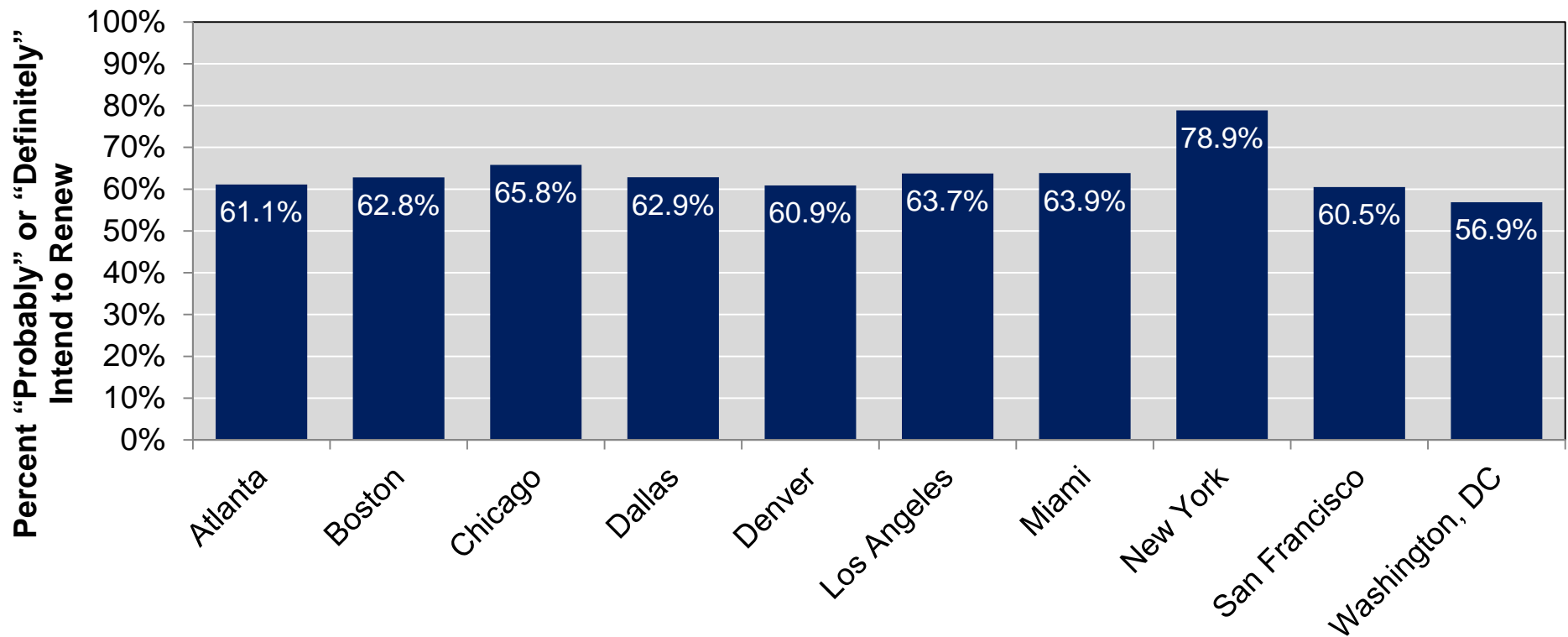
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>> Renewal Intent by Market



Four Quarters Ending Q2 2011

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>> Renewal Decision Factors

Decision Factor	Percent of Residents UNLIKELY to Renew
Rental rate	43.0%
Community management	24.9%
Apartment features / finishes	24.3%
Security	19.8%
Quality of community	18.2%

Decision Factor	Percent of Residents UNSURE of Renewal
Rental rate	39.7%
Location	27.4%
Apartment features / finishes	23.5%
Value for amount paid	19.1%
Security	19.1%

Decision Factor	Percent of Residents LIKELY to Renew
Location	73.4%
Community appearance	45.2%
Apartment features / finishes	44.5%
Rental rate	39.2%
Community management	38.5%

Four Quarters Ending Q2 2011

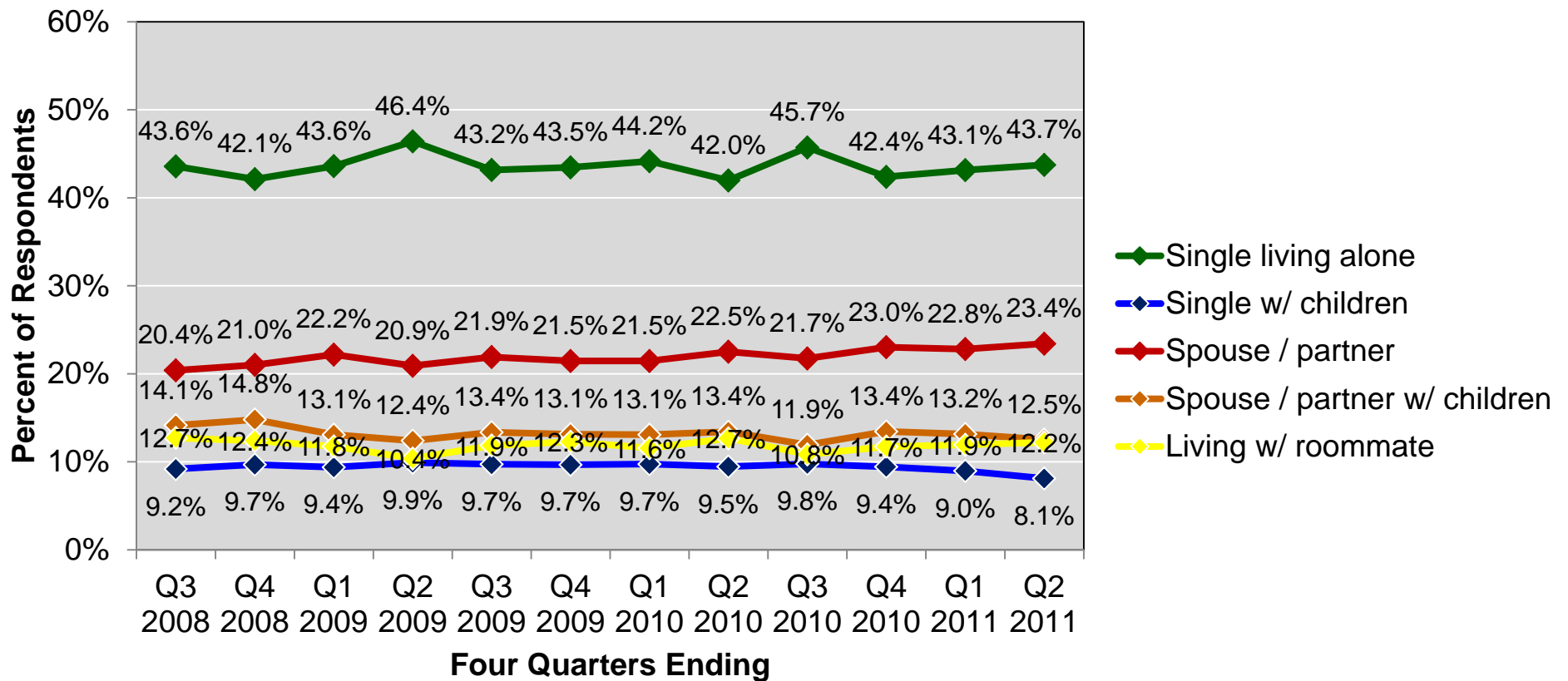
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>> Living Arrangement



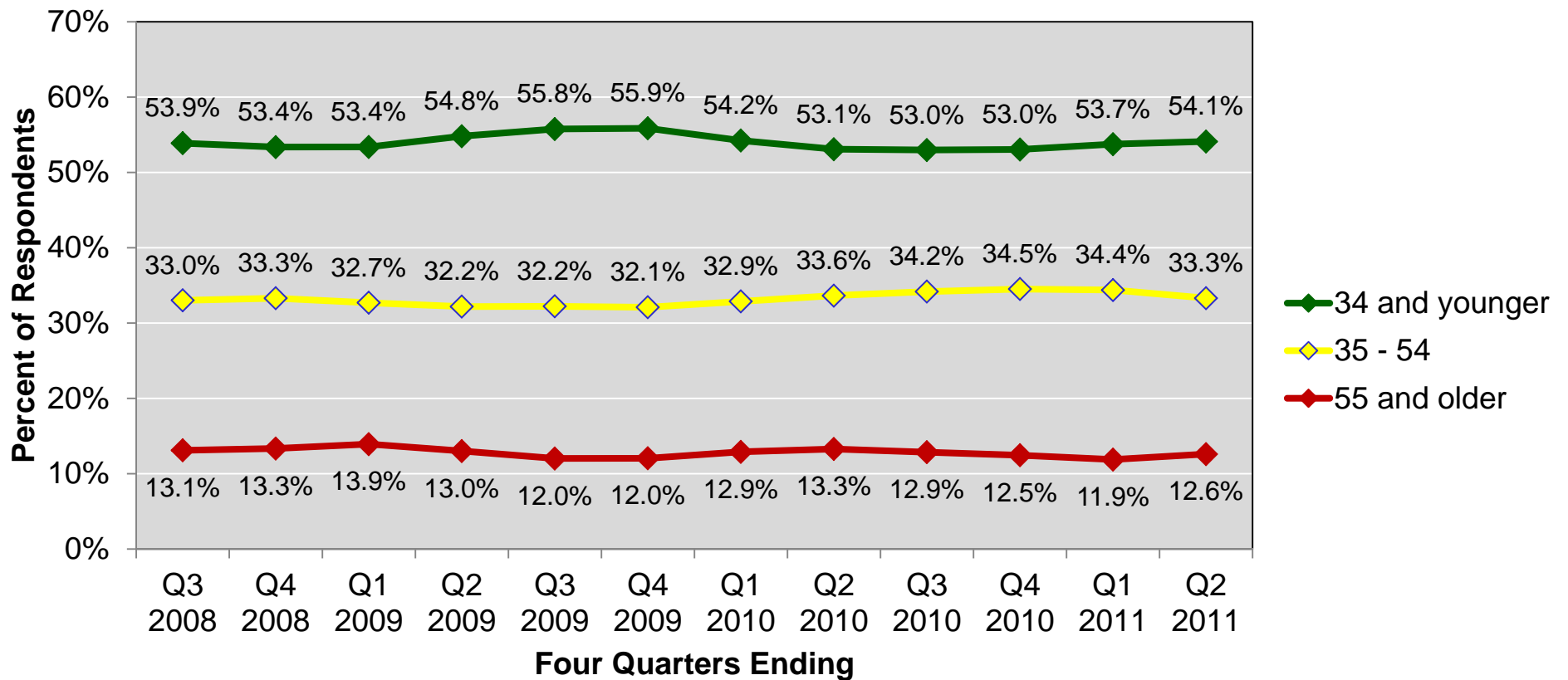
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>> Age



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- Broker perception surveys
- Client and investor surveys
- Compensation research
- Fund structuring and fee benchmarking
- Portfolio performance scorecards
- Time and motion studies

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- Organizational structuring
- Succession planning
- Competitive positioning assessments
- Strategic planning facilitation

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www.kingsleyassociates.com

44 Montgomery Street
Suite 1430
San Francisco, CA 94104

415.777.1140

229 Peachtree Street NE
Suite 1100
Atlanta, GA 30303

770.908.1220

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