The Ongoing Evolution of Amenity Spaces

Understand the importance of technology and flexibility in amenity offerings to meet residents' needs.

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NATIONAL APARTMENT ASSOCIATION
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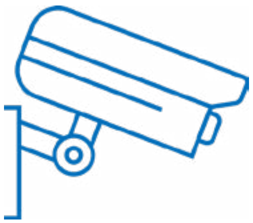
Amenities are an integral part of apartment living, but knowing which will attract and retain residents often is a moving target. The National Apartment Association (NAA) surveyed apartment owners and operators to uncover which features are most important in the following amenity types: Community spaces (such as communal kitchens, coffee bars and event space), electric vehicle (EV) charging stations, fitness centers, package rooms and co-working spaces.

The survey focused on amenities in properties that were either under construction, newly built or where amenities had been upgraded within the past three years. In addition to the importance of features such as technology, furniture/equipment, size of the space and security in new construction, survey participants also were asked which of these features had been modified in their existing properties. Finally, several open-ended questions tackled the ongoing challenges of package handling.

The survey received 250 responses from apartment industry professionals, more than half of whom indicated having projects under construction or recently completed within the past three years.

Amenity Space Trends in New Construction

The data from 60.9% of survey respondents – representing those with projects under construction or newly completed apartment buildings – provided a detailed outlook of amenity feature priorities across five spaces. For each amenity space, they were asked to select their top two features from the list provided: Security, equipment or furniture, size, and technology or connectivity.



Security is paramount in **package rooms**, with 78.9% of participants ranking it as the utmost feature, accompanied by **technology/connectivity**, which was chosen by 45.9%. **Equipment**, at 21.1%, was the least valued. This prioritization indicates that property managers and operators are more focused on ensuring safe parcel delivery rather than on the physical infrastructure. Additionally, ease of accessibility to package rooms is seen as a critical feature.

Unsurprisingly, for **communal working spaces**, **technology/connectivity** led the rankings, with **equipment/furniture** not far behind. Residents value functionality – such as robust internet access, desktop devices, printers and so on – over the space's physical **size**. Others also suggested using individual work pods or private areas to satisfy the desire for secluded and dedicated zones that boost concentration and productivity.

In **community spaces**, 83.5% of respondents chose **equipment/furniture** as the most important feature. As anticipated, this sentiment was even stronger in **fitness centers**, where 95.4% made the same choice as state-of-the-art **equipment** is top of mind for residents. And since the equipment itself has become more high-tech, **technology/connectivity** ranked second. The supplementary emphasis on **size** highlights the need for sufficient space to accommodate equipment and furniture without feeling cramped. Moreover, others proposed for multifunctional spaces and greater variety, signaling a push toward more adaptable environments.

For **EV charging areas**, **technology/connectivity** was the leading priority at 77.1%, closely followed by **equipment** at 74.3%. This combination reflects the integrated nature of these features for this amenity space, where digital control systems complement the physical infrastructure. **Security** was less of a concern (selected by 17.4%), while additional factors such as location, installation cost and future scalability were also cited.

Overall, the findings echo that amenity feature preferences align closely with the intended use of each space, which stresses the ongoing need for balance among residents' desires, convenience and practical functionality.

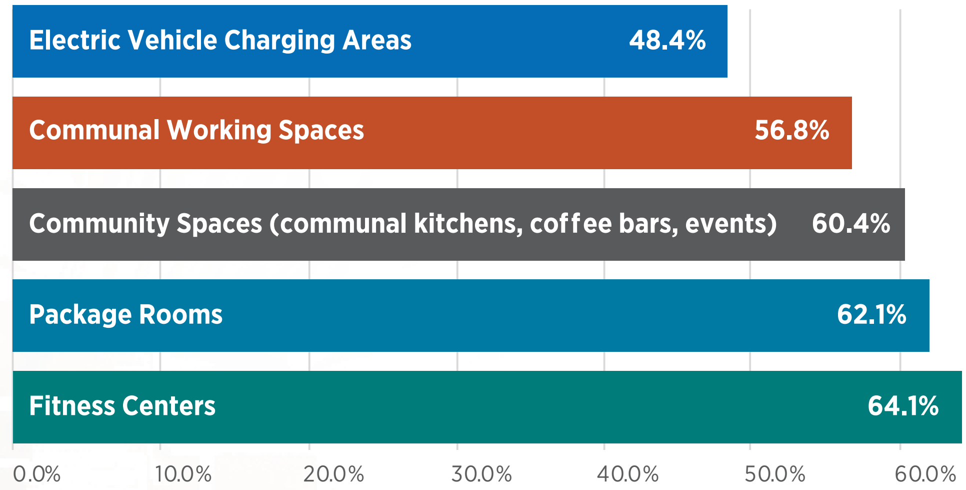
Trends in Upgraded Amenity Spaces

All respondents were asked to share recent changes or upgrades that have been made to their amenity spaces (excluding new construction). They were presented with a checklist that included the following options: Size, security, equipment/furniture, technology/connectivity, as well as responses indicating that no recent changes have been made, that the amenity space is not offered and a field to specify other modifications.

While many participants reported making no adjustments to amenity spaces, the one exception was fitness centers, where upgrades to **equipment** were the most predominant feature and noted by 49.2% of respondents.

Focusing on responses that reflected active modifications, the most common upgrade across all amenity spaces was **equipment/furniture**. Interestingly, an outlier was observed in package rooms, where **equipment** and **security** upgrades were both the least frequently reported at 17.3%, with the most common upgrade being **technology** at 18.4%. Additionally, **technology/connectivity** improvements were the second most prominent in communal working spaces (26.8%) and community spaces (21.2%), with electric vehicle charging areas (17.3%) and fitness centers (16.2%) having a slightly lower proportion of participants indicating recent technological upgrades. This stark difference in prioritizing technology in fitness centers in new construction highlights just one of the challenges of older properties remaining competitive on the amenity front.

PERCENTAGE OF RESPONDENTS WITH UPGRADES TO AMENITY SPACES

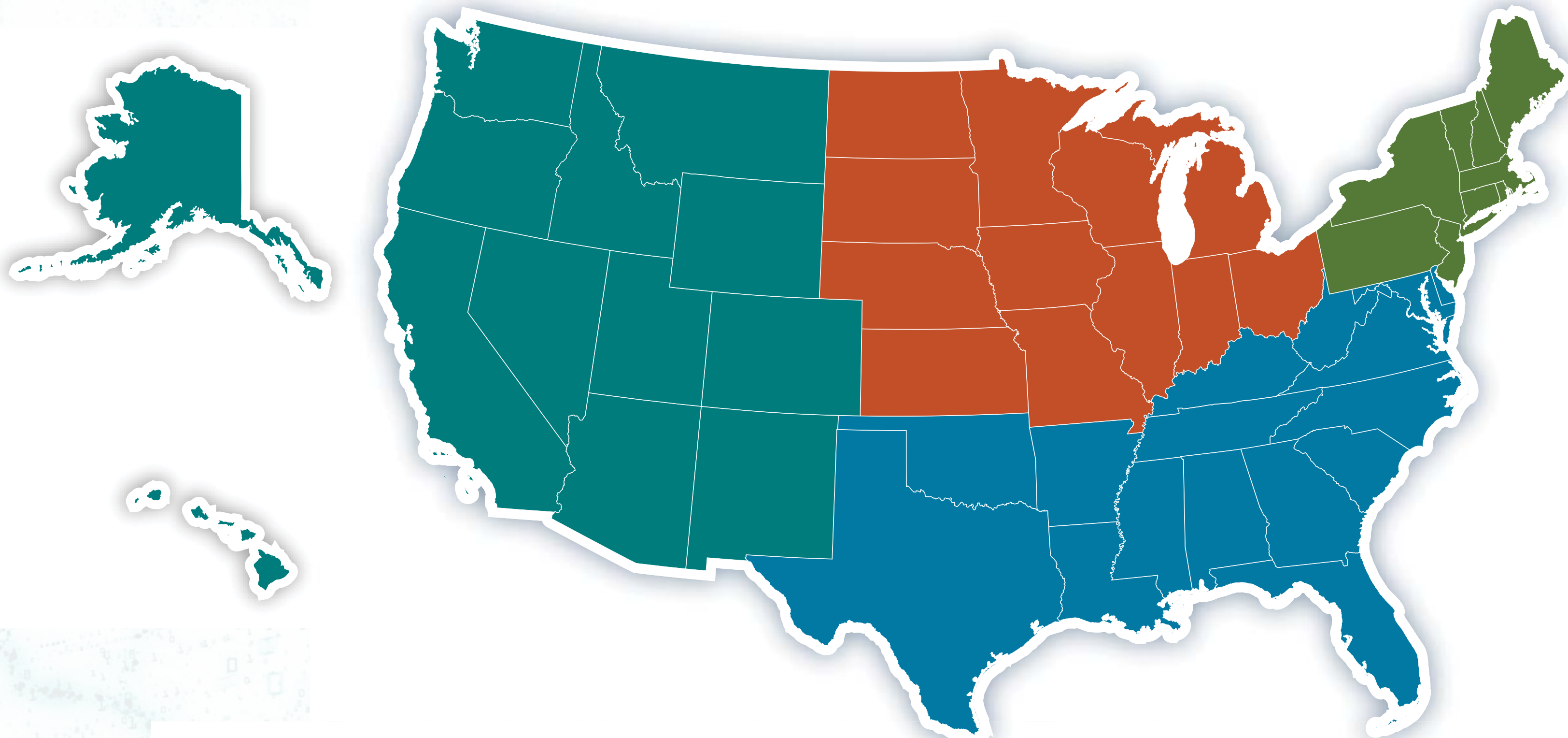


Respondents also listed a variety of additional modifications to amenity spaces such as **revamped flooring** and **painting**, **flex work spaces**, installation of **smart lockers**, **golf simulators** and increased diversity of options in community spaces (e.g., dog parks, pet washing stations, relaxation features like spa services and saunas, community gardens, movie rooms, collaborative spaces and flex spaces that can be reserved for personal use).

Generally, the findings suggest that upgrades to amenities are prioritizing the reworking of existing spaces. The emphasis is on improving the overall property value and meeting residents' needs by enhancing functionality and modernizing features, with equipment and technology upgrades as the major drivers of these initiatives.

Regional Trends

To better understand regional trends in multifamily housing amenity spaces, this analysis examines how upgrade priorities vary across U.S. Census regions – Northeast, Midwest, South and West. Identifying these distinctions provides insight into how different regions strategically allocate resources for property enhancements, influenced by factors like resident demand, economic conditions and operational priorities of various multifamily housing types.



Amenity Feature Priorities

	West	South	Midwest	Northeast
Size	10.3%	15.2%	8.9%	15.0%
Security	12.8%	10.6%	8.9%	10.0%
Equipment	38.5%	37.9%	40.0%	35.0%
Technology/ Connectivity	38.5%	36.4%	42.2%	40.0%

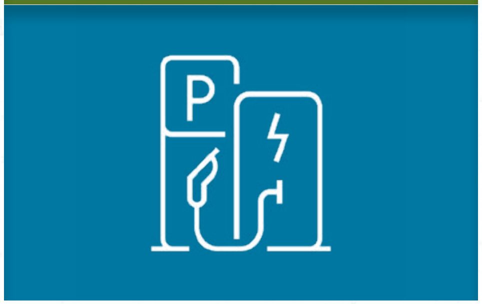
**Due to rounding, totals may not sum to 100%*

Distinct regional preferences emerged in **package room** upgrades. In the Northeast and Midwest, security upgrades were the most selected enhancement, followed by technology/connectivity improvements. This suggests a higher emphasis on theft prevention and controlled package access, both of which are leading priorities for residents. In the South, more focus was placed on automation and convenience as technology/connectivity was the leading upgrade, while the West prioritized equipment over security upgrades.

For **fitness centers**, all regions ranked equipment upgrades at the top, reinforcing the growing demand for modern, high-performance fitness solutions. However, there were nuanced differences in supplementary enhancements. The South had a stronger preference for technological enhancements, indicating broader demand for digital engagement. With an equal split between technological and security enhancements, the Midwest and West regions took a more balanced approach to both enhancing interactive fitness experiences and residents' safety. Likewise, the Northeast region demonstrated a robust distribution of priorities across technology, security and size upgrades.

With remote and hybrid work influencing resident preferences, **co-working spaces** have seen significant renovations across regions. The Northeast and Midwest regions have focused more on technology/connectivity upgrades, followed closely by equipment/furniture enhancements. This indicates that strong, high-speed internet services and digital infrastructure are key factors in these regions. The South placed slightly more emphasis on equipment/furniture upgrades while there was an even split between technology and equipment enhancements in the West, which may stem from a need to balance digital accessibility with high-quality workspaces.

Common areas such as communal kitchens, coffee bars, lounges and event spaces saw upgrades primarily in equipment/furniture and technology/connectivity. The Northeast and South focused slightly more on size accommodations, optimizing space and expanding capacity for residents. On the other hand, the Midwest and West regions had a higher focus on security improvements, which could indicate a need for surveillance, access control and guest access/management systems in communal areas due to either higher security risks in shared spaces or a need to enhance liability protections in these regions.



With the expansion of electric vehicle adoption, renovations to **EV charging areas** have seen consistent investment in equipment, followed by technology upgrades across all regions. This signals broader industry shifts as properties strive to remain competitive. Additionally, the West was the only region that had the highest portion of responses (20%) prioritizing size, which suggests a greater need to accommodate rising EV ownership rates. This is no surprise, given California's investments in EV infrastructure and initiatives to spur EV adoption rates. According to the United States Energy Information Administration (EIA), California has consistently held the largest share of the nation's EV market since 2016.

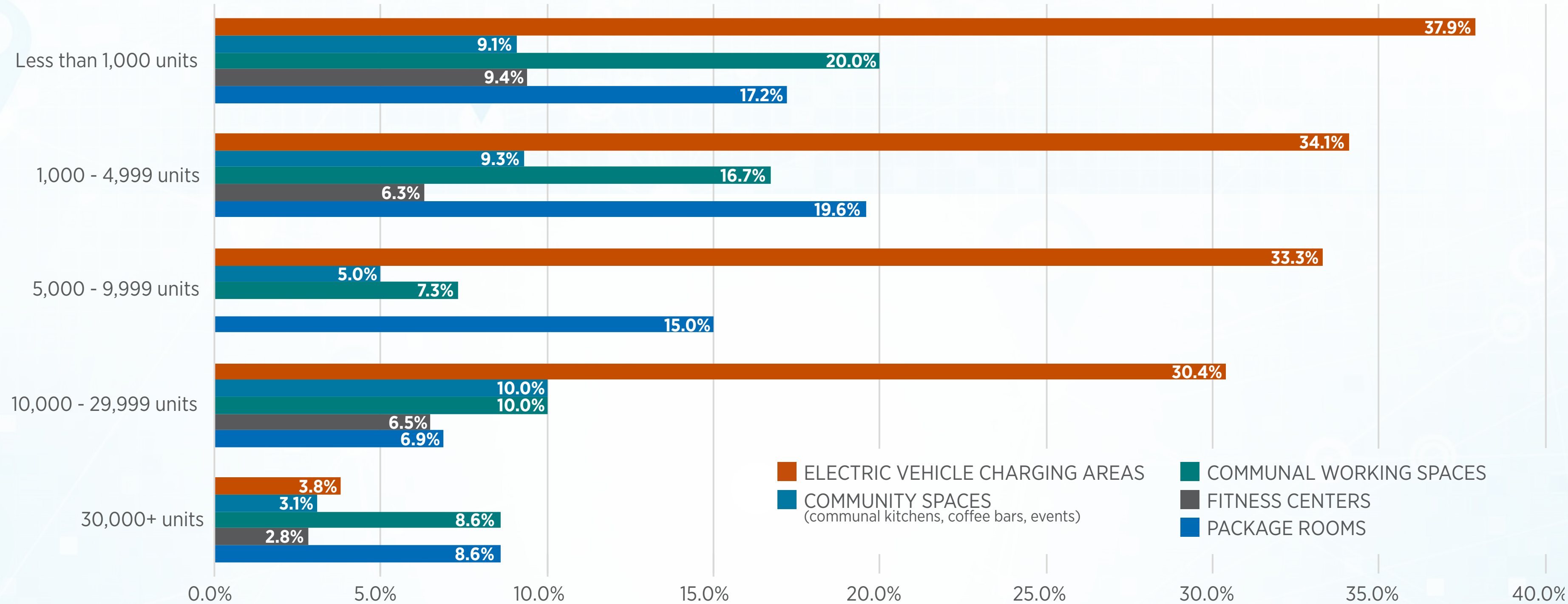
Trends by Portfolio Size

Our analysis categorizes portfolio size into five distinct ranges based on units owned or managed: Fewer than 1,000 units, 1,000 to 4,999 units, 5,000 to 9,999 units, 10,000 to 29,999 units and 30,000+ units. While responses received were fairly evenly distributed across all portfolio sizes, the highest concentration (30.1%) of responses received fell within the 1,000 to 4,999-unit range. Also, most respondents, across all ranges of portfolio sizes indicated having properties under construction or newly completed, suggesting that expansion efforts are occurring regardless of portfolio scale.

While primary amenity preferences remained consistent across all groups, there were subtle variations in secondary priorities for some amenity areas. For **package rooms**, smaller (<1,000 units) and larger (10,000+ units) portfolios prioritized **technology/connectivity**, while mid-sized portfolios (1,000 – 9,999 units) placed greater emphasis on **size**. A similar trend was observed for **fitness centers**, where most respondents, except those for smaller portfolios, ranked **size** over **technology/connectivity**, highlighting potential differences in capacity limits or resident demand.

Furthermore, results displayed a correlation between portfolio size groups and the availability of specific amenities. For instance, only 3.8% of responses from 30,000+ unit portfolios reported not offering **EV charging areas**, whereas a higher proportion (between 30% – 40%) of responses across smaller portfolio groups reported otherwise. This suggests larger portfolios either simply have the scale and resources for EV-charging implementation or are proactively integrating this amenity to stay competitive and serve a more diverse group of residents requiring this feature.

Percent Not Offering Amenity Space

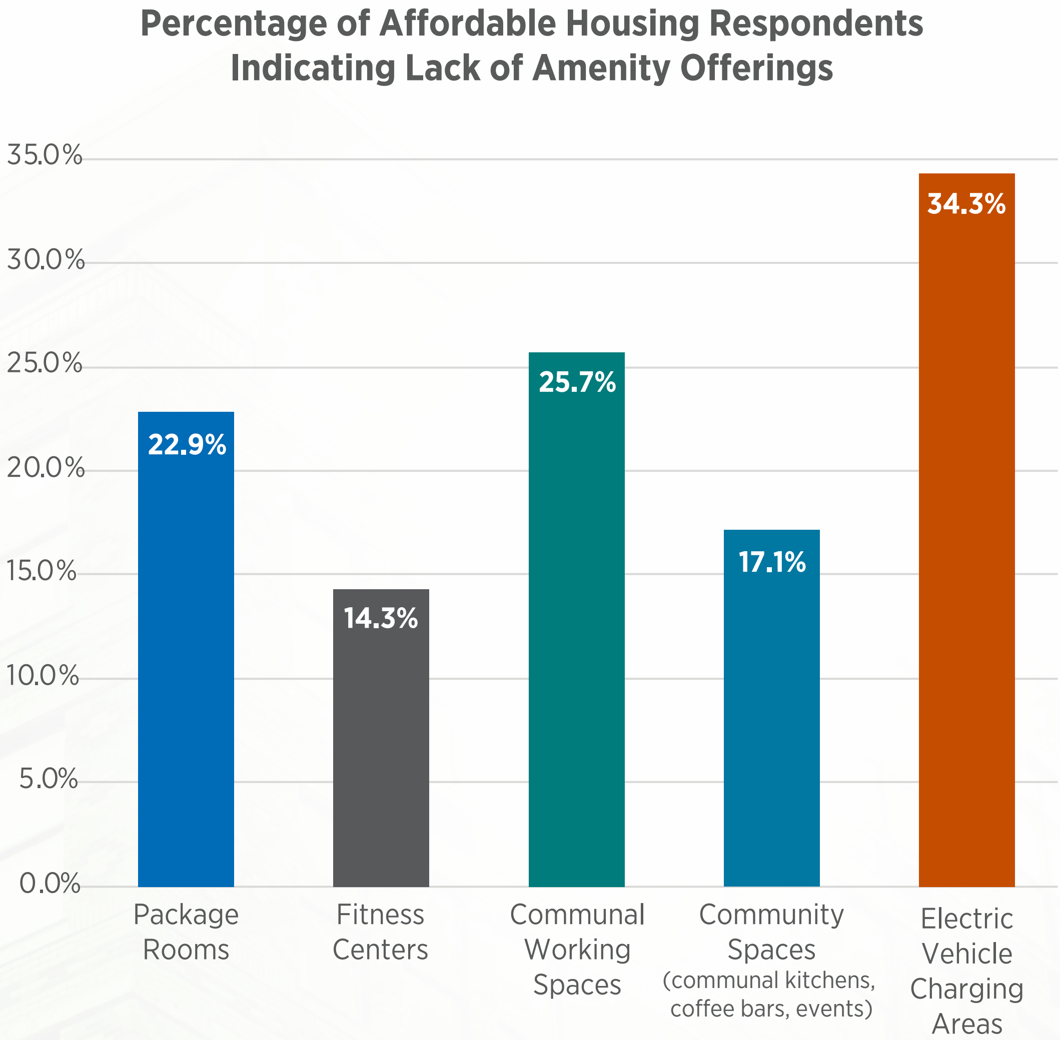


Amenities in Affordable Properties

While responses were captured for conventional multifamily housing, affordable housing, single-family units, student housing and senior living, sample size limitations restrict deeper analysis of non-conventional properties to affordable.

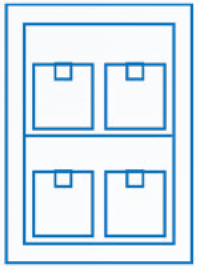
Nearly 66% of affordable housing respondents indicated they had projects under construction or recently completed. Priorities for amenity spaces largely aligned with conventional providers with the exception of community areas. Both groups saw **equipment** and **furnishings** as key to making these spaces successful, but affordable owners were more focused on **technology** and **connectivity**, possibly due to a lack of dedicated space for those residents who work from home.

Affordable housing providers were more likely to offer fewer amenities given budget constraints and other structural differences in operations. Some 26% of them do not provide communal working spaces while 34.3% do not offer EV chargers. For the remaining amenities, respondents were more likely to have made changes to package rooms with a particular focus on **equipment**. Community spaces showed similar trends to new construction priorities with emphasis placed on **furnishings** and **connectivity**.



Challenges and Solutions for Package Handling

Several questions in the survey focused on package areas and the advantages and challenges associated with them. Respondents who had issues with some carriers not using package lockers or not using them correctly emphasized the importance of establishing communications with carriers, and if not successful, filing complaints on those who are non-compliant. For seasonal influxes and overflows of packages, implementing policies and communicating them to residents is key to ensuring that secure package areas are made available to all residents.



Many respondents said the best solution was a combination of package lockers and package rooms with shelving, including overflow rooms to complement the lockers.

In addition to communication, establishing relationships with carriers is key. Tutorials for carriers as they approach the package area, and signage for helping carriers locate the package areas and properly use the lockers were two solutions offered. One survey participant cited the creation of incentives, using a gaming system to reward carriers that comply. Once a certain point total is reached, they receive a gift card.

Limited compartment size variations within each package tower can also be a challenge. Many respondents said the best solution was a combination of package lockers and package rooms with shelving, including overflow rooms to complement the lockers. Locker systems that offer a range of locker sizes to accommodate a variety of package dimensions were noted as good options. Others have added larger package-size towers and remarked that newer communities have built-in package rooms with login technology at the door for picking up a package.

For seasonal influxes and overflows of packages, many owners and operators hire temporary staff to help and add additional lockers and package rooms. Several mentioned converting unused community spaces, including conference rooms to package rooms as well as using open shelving.

Communication with residents also is key during these times, including sending notices to pick up packages and implementing policies around package retention time limits. During the holidays, one company has special package pick-up hours with expiration times and sends reminders to residents beforehand to prepare them for the change and to stay informed throughout the season. Many deliver packages to the door during this time to help reduce overflow. Finally, developing processes with onsite teams ahead of time so that they are proactively handling the overflow as opposed to being reactive was cited as another helpful solution.

Survey participants shared their residents' ideas for package needs, including the opportunity for food storage, and more secure options, in general. One community had an ongoing issue with package theft, so they connected a package room to their clubhouse key fob system for after-hours resident access. In addition to residents' primary concerns with security, they want convenience and access to packages 24/7. Residents indicated an openness to a variety of package handling options, provided their packages are easily accessible and in a centralized, secure location.

The Evolution of Amenity Spaces

Technology featured prominently in most amenity areas in new construction. Aside from the obvious importance of technology in communal working space and EV charging areas, it is also central in package areas, fitness centers and even shared community spaces. Equipment and furnishings are also top of mind in new properties, not only for fitness centers, but community spaces as well, where aesthetics play a key role in attracting residents to the space. One participant noted that these spaces need to have a “luxurious” feel to them.

Fitness centers were the number one amenity space owners and operators of existing properties were focused on, be it fully revamping them or making minor tweaks. Fitness centers have consistently come out at or near the top of desired amenities in resident surveys over the years. In fact, Greystar’s 2024 “By Design” survey of more than 90,000 residents showed fitness centers in the number two spot, second only to parking. Some 31% of residents surveyed said they would not even consider renting in a community without a fitness center.

Community spaces, amenity areas that naturally lend themselves to flexible uses, placed second in spaces that have been recently modified. While the most likely alterations were to **furnishings** and/or **equipment**, making smaller, separate, more functional spaces available for use versus one large space was appealing to residents. These spaces are easily adaptable based on evolving renter preferences.

Finally, package handling remains an ongoing challenge for many owners and operators. Communications, with both carriers and residents, is paramount in overcoming obstacles. Flexibility is also key in this amenity space with a mix of lockers and shelving cited as a low-cost, simple solution to many package woes.

Key Takeaways:

Embrace technology in amenity spaces

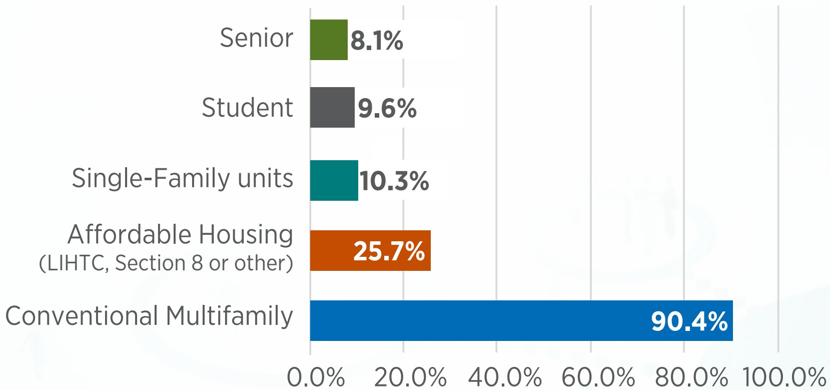
Never neglect fitness centers

Leverage the flexibility of community spaces to meet residents’ needs

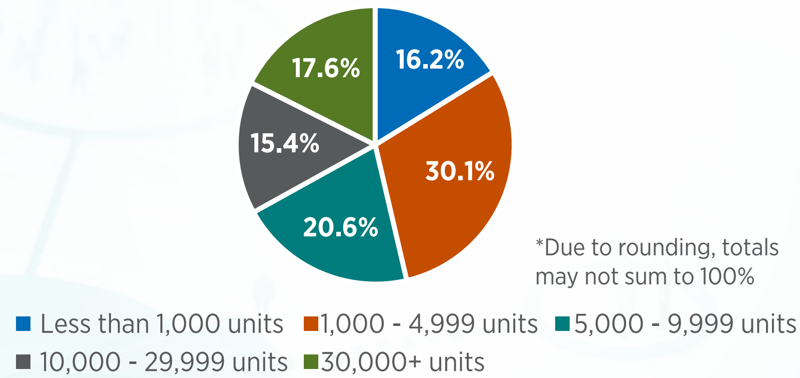
Enhance communications with carriers and residents to to improve all facets of package handling.

Survey Profile

Overall Breakdown by Property Types



Overall Breakdown by Portfolio Size



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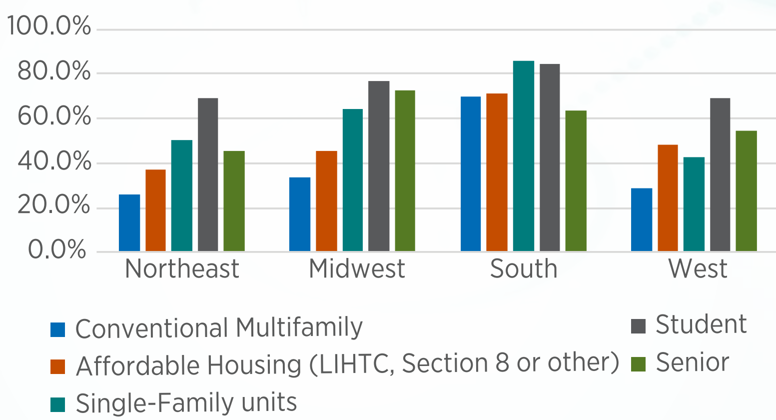
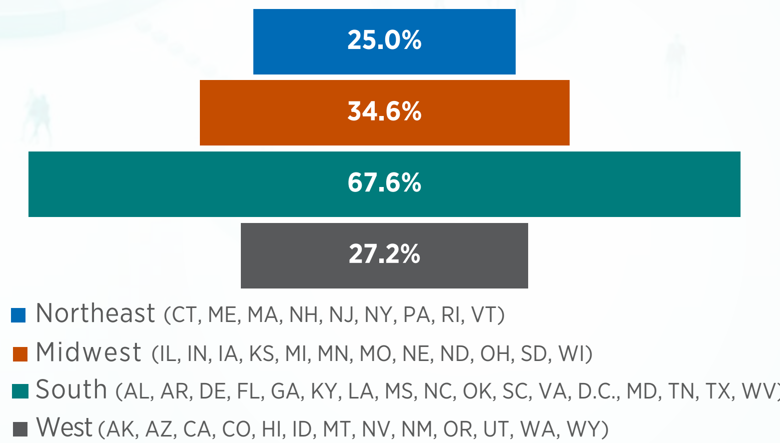
Regional Breakdown by Property Types



Overall Breakdown by Regions



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