



RESIDENT ATTITUDE

TOWARDS
RENEWALS AND
ONLINE REPUTATION

JUNE 2018



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About J Turner Research

J Turner Research is the leading market research firm exclusively serving the multifamily industry. Our data and research empower management companies to drive revenue. We offer customer insights and an integrated online reputation management platform that enables companies to enhance resident satisfaction, increase closing ratios, and improve online reputation.

We extensively survey thousands of residents and prospects each month to offer actionable feedback to our clients. Our **Online Reputation Assessment™ (ORA™)** score serves as the industry standard for measuring a property's online reputation. This score is based on monthly online reputation monitoring of more than 78,000 properties nationwide, across 20+ review sites and ILSs. Companies can not only monitor and benchmark their **ORA™** scores, but they can also manage and respond to online reviews all from a single platform.

As industry influencers, we have produced more than 20 national research studies that unravel emerging trends, shifting demographics, industry best practices, and new market opportunities. Headquartered in Houston, we have been helping multifamily companies to advance their portfolios since 2003.

Executive Summary

J Turner Research's study – *Resident Attitude Towards Renewals and Online Reputation* explores resident thought process towards renewals, online reviews, and manager responses.

The objective of the study is twofold:

- To understand resident attitude towards renewals – renewal timing, communication expectation, intent to renew and relationship with satisfaction.
- To examine how residents have evolved in their engagement with online reviews— impact of online reviews, review sources, manager responses and its influence on residents' perception of an apartment community.

Demographic Profile



39,000+
Residents



845
Properties



14
Companies



61%
Female



39%
Male



38.56
Years (Average Age)

What you will learn from this study

Resident Attitude Towards Renewals

- Renewal timing and resident expectations
 - The communication method preferred by residents for renewal
 - Intent to renew and relationship with overall satisfaction
 - The factors that affect residents' renewal decision
 - The reasons why prospects move from their previous apartment
-

Resident Attitude Towards Online Reputation

- The effectiveness of various review sources
- The importance of online reputation of a management company
- The trust and effect of online reviews on a resident's decision to visit a property
- The expectations and influence of manager responses
- The interplay between giving and asking for reviews
- The role of Facebook in the apartment search process

In presenting residents' perspectives on online reviews, this study quotes findings from our recent student housing study involving 21,498 students and parents nationally – *The Evolution of Online Reputation: Do Reviews and Responses Matter?*

Participating Companies

We are thankful to the following companies for their participation in this study.

The logo for AION MANAGEMENT features the word "AION" in a large, blue, sans-serif font, with a vertical orange bar between the "I" and "O". Below "AION" is the word "MANAGEMENT" in a smaller, blue, sans-serif font.The logo for BOZZUTO features a green triangle pointing to the right, followed by the word "BOZZUTO" in a green, sans-serif font.The logo for dayrise residential features a circular arrangement of yellow dots to the left of the word "dayrise" in a bold, black, sans-serif font. Below "dayrise" is the word "residential" in a smaller, black, sans-serif font.The logo for ForestCity features a green arc above the word "ForestCity" in a blue, sans-serif font.The logo for GABLES RESIDENTIAL features a green diamond shape composed of four smaller diamonds above the word "GABLES" in a white, serif font. Below "GABLES" is the word "RESIDENTIAL" in a smaller, white, serif font.The logo for LumaCorp Inc. features a white star icon to the left of the word "LumaCorp Inc." in a white, sans-serif font.The logo for MANDEL GROUP features a white diamond icon to the left of the word "MANDEL GROUP" in a white, sans-serif font.The logo for MAXUS PROPERTIES features the word "MAXUS" in a large, red, serif font, with a horizontal line below it. Below the line is the word "PROPERTIES" in a smaller, red, serif font.The logo for MORGAN PROPERTIES features the word "MORGAN" in a large, blue, sans-serif font, with the word "PROPERTIES" in a smaller, blue, sans-serif font below it.The logo for Pace REALTY CORPORATION features the word "Pace" in a white, sans-serif font inside a blue rounded rectangle. Below the rectangle is the text "REALTY CORPORATION" in a smaller, white, sans-serif font.The logo for PANTHER PROPERTIES INVESTMENT, LLC features a white panther head silhouette to the right of the word "PANTHER" in a large, orange, sans-serif font. Below "PANTHER" is the text "PROPERTIES INVESTMENT, LLC" in a smaller, orange, sans-serif font.The logo for PB Bell features a blue square icon with a white "PB" inside, followed by the word "PB Bell" in a black, sans-serif font.The logo for RAM PARTNERS, LLC features the word "RAM" in a large, white, sans-serif font on a blue background. Below "RAM" is the text "PARTNERS, LLC" in a smaller, white, sans-serif font.The logo for ROCKSTAR CAPITAL MANAGEMENT features a colorful star icon above the word "ROCKSTAR" in a large, orange, sans-serif font. Below "ROCKSTAR" is the text "CAPITAL MANAGEMENT" in a smaller, orange, sans-serif font.

Key Findings

“ With the rent increase every year, I simply can't afford it. Also, too many issues within the building that never get addressed. Property is always dirty, elevators smell of urine, trash all around and laundry machines are always broken.

“ Bad customer service from office staff and poor upkeep of the apartments and general community.

- **Renewal, the time is now!**
- Resident satisfaction is the core driving force behind renewals.
- When to communicate with residents about lease renewal – 3-month and 5-month mark.
- Email is the most preferred method for renewal communication.
- Online reputation continues to influence resident and prospect behavior.
- Strong correlation between online reputation and resident satisfaction.
- Manager responses yield considerable influence on resident perceptions.
- Facebook is gaining popularity among prospects: reviews and pictures matter the most.
- Posting Reviews – A proactive approach works.

Renewal, the time is now!

- Residents who are 3-6 months into their lease are very likely to renew right now at the current rate.

Resident satisfaction is the core driving force behind renewals

- There is a strong correlation between resident satisfaction and intent to renew. The respondents who are willing to renew their lease rated their overall satisfaction with the property at 8.14 on a 10-point scale, this is 35% higher than the ones who said no. The naysayers rated their satisfaction at 6.04.

When to communicate with residents about lease renewal – 3-month and 5-month mark

- A good majority of residents (40%) want the management company to contact them about lease renewal three months prior to their lease expiration.
- While more than half (57%) of residents start considering renewing their lease 1-3 months before lease expiration. There is a sweet spot at the 6-month mark—12% of participants said that they start considering renewing their lease six months before lease expiration. Management companies may want to consider communicating with residents at the 5-month mark.

Email wins hands down for renewal communication

- For renewal communication, email is the most preferred communication method among residents – 79% of participants chose email over other methods such as letters, phone calls, and text messages.

Online reputation continues to influence resident and prospect behavior

- Respondents rated the importance of the online reputation of the management company managing their apartment community at a high of 7.85 on a 10-point scale.
- Although residents consider multiple factors while deciding to ultimately rent at a property, online reviews account for a significant 52% of the total influence. In a separate study involving more than 19,000 students¹, the influence of online reviews was rated at 47%.

Strong correlation between online reputation and resident satisfaction

- At a statistically strong 0.69, there is a positive correlation between online reputation and residents who responded in the affirmative to being satisfied with their living experience at the apartment community. This indicates that in most cases properties with higher resident satisfaction have a better online reputation.

¹ 2018 The Evolution of Online Reputation: Do Reviews and Responses Matter?

Manager responses yield considerable influence on resident perceptions

- Manager responses are emerging as a compelling factor in the apartment shopping process.
- More than two-thirds of conventional residents and students pay attention to manager responses while researching apartments online.
- Manager responses significantly improve residents' perceptions of the apartment community; conventional residents rate this influence at a high of 8.12 on a 10-point scale.
- Conventional residents and students reject cookie-cutter responses. Their top three expectations from a manager's response are identical: commitment to resolve the issue, authentic/customized response, and the right attitude.

Facebook is gaining popularity among prospects; reviews and pictures matter the most

- Our research indicates that Facebook has increased in popularity as a search medium among conventional residents and students. The use of this platform has jumped 19 percentage points among conventional residents and 17 percentage points among students since 2017.
- More students (38%) than conventional residents (30%) reported visiting the Facebook page of a property before leasing.
- When residents visit your Facebook page, both conventional and student, they focus largely on online reviews and pictures of your community. However, the percentage seeking reviews and pictures is higher among students.

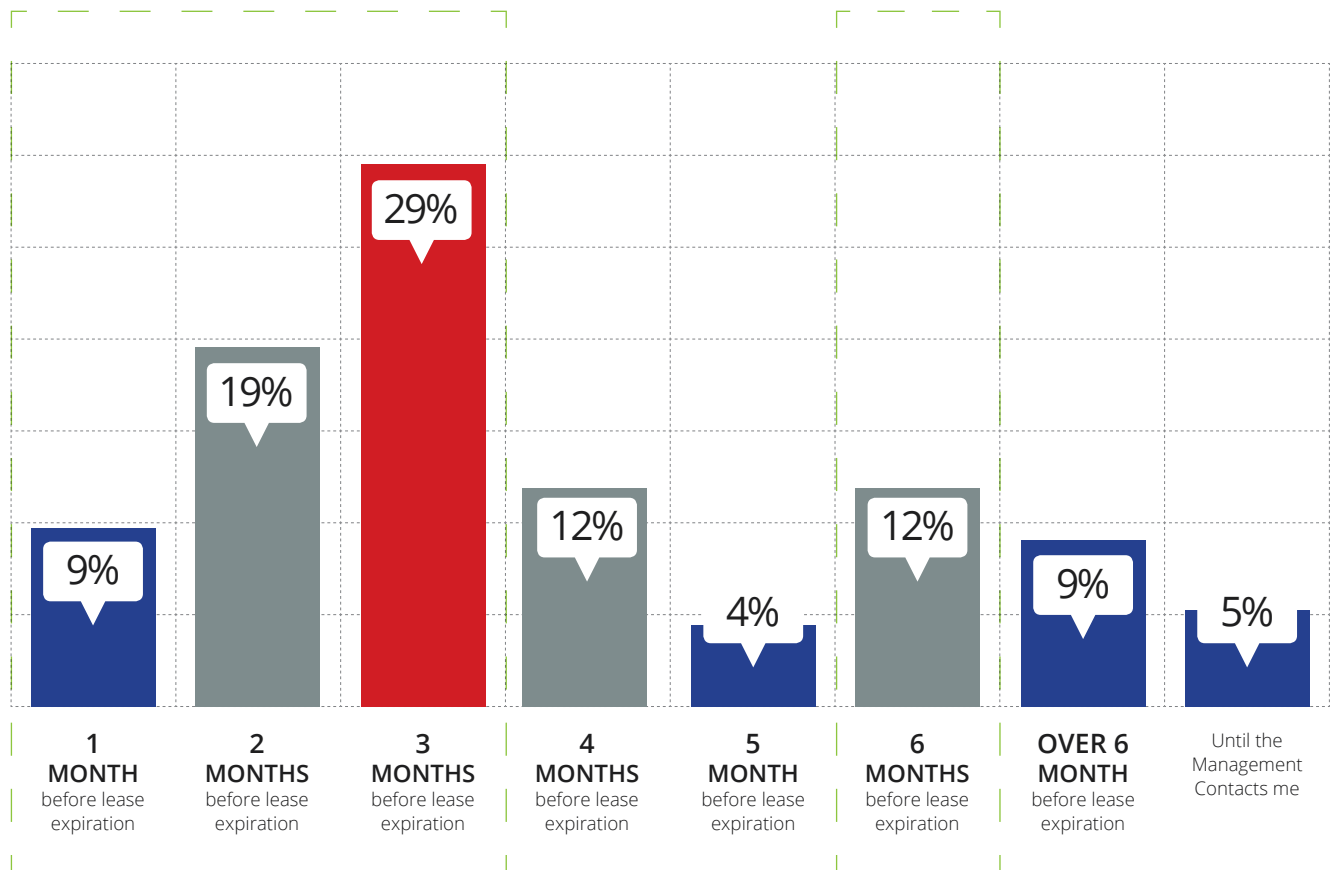
Posting Reviews – A proactive approach works

- It pays to proactively reach out to residents for reviews. Residents are more likely to post a review, if asked. Overall, 26% indicated leaving a review, but almost half of the participants indicated reviewing a property when they were asked to post a review.
- More students than conventional residents have been asked to post a review online. Thirty-two percent of students have been asked, while only 27% of residents have been asked to post a review online.
- By incentivizing residents, an apartment community will get more reviews as more respondents indicate a willingness to post a review, if asked. But the trust level of reviews that appear to be incentivized is low. The overall trust for incentivized reviews is only 4.95.

Resident Perspective On Renewals

Renewal Timing

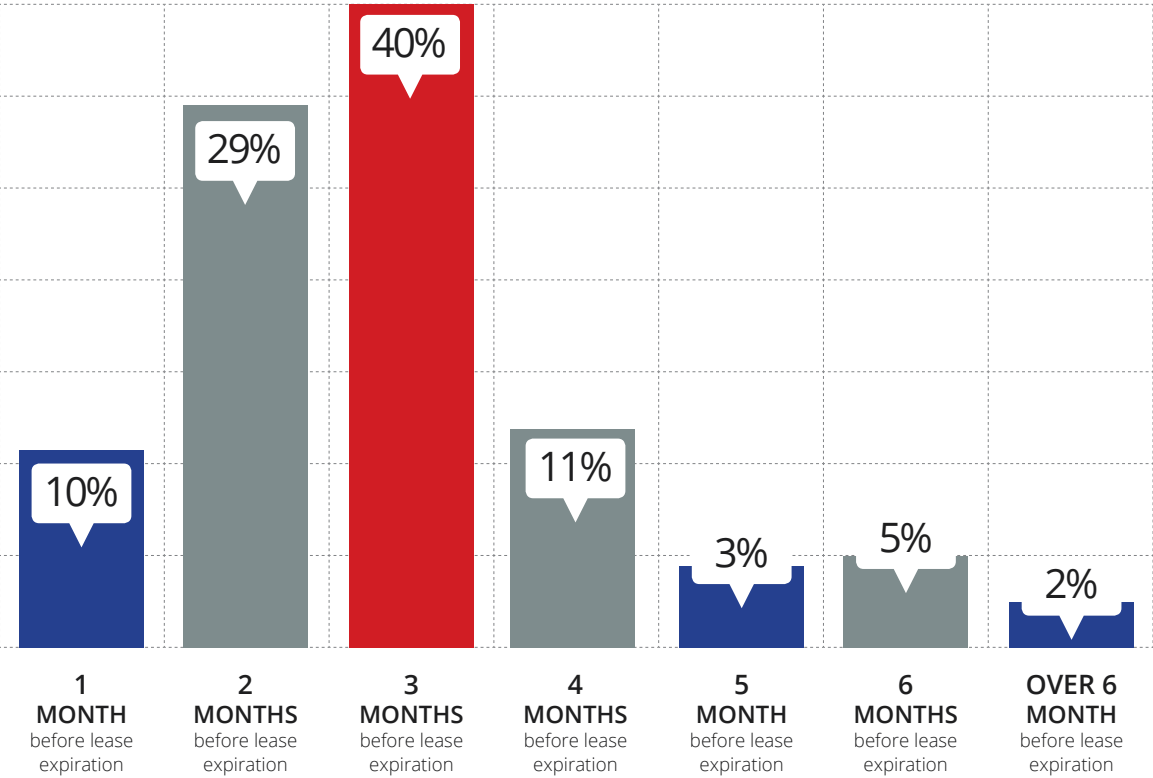
When do you start considering to renew your lease?



Our research indicates that more than half (57%) of residents start considering renewing their lease 1-3 months before lease expiration. There is a sweet spot at the 6-month mark—12% of participants said that they start considering renewing their lease six months before lease expiration. Management companies may want to consider communicating with residents at the 5-month mark.

Renewal Timing Expectation

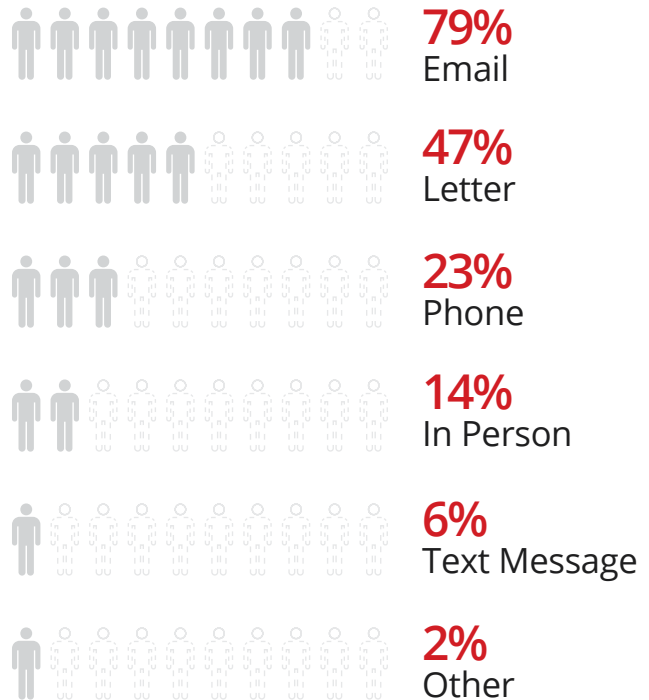
How soon do you want the management company to approach you for lease renewal or communicate with you regarding lease renewal?



What’s the optimal time to start communicating with residents regarding their lease renewal? While 40% of residents reported that they want to be contacted three months before lease expiration, 29% said they would like to be approached two months prior to their lease ending.

Preferred Communication Method

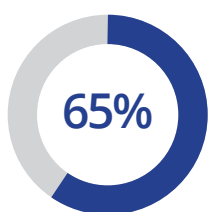
How would you like the management to contact you about the lease renewal options?



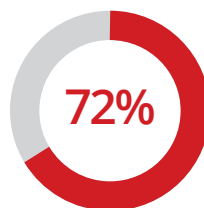
Email emerged as the most preferred communication method among residents; a good majority, 79%, of residents prefer that the management company contacts them regarding renewal via email. Next in line is a letter at 47%, followed by a phone call at 23%.

Renewal – The Time is Now!

Would you renew now at the same rate?



Lease Expiring
within 8 months.



Lease Expiring in
9 months or more

In the survey, we asked the residents for their lease end date and if they will renew their lease at the current rate. Sixty-five percent of residents whose leases were expiring in 2018 indicated renewing at the current rate whereas 72% of residents with leases expiring in 2019 were inclined to renew at the current rate. This is a good opportunity for companies to target residents very early in the lease for renewal, especially in markets where the rent has plateaued.

Renewal vs. Resident Satisfaction

Will you renew your lease vs. overall satisfaction at the property?



The core driving force for renewal is resident satisfaction. The residents who are willing to renew their lease rated their overall satisfaction with the property at 8.14 on a 10-point scale; this is 35% higher than the ones who said no. The naysayers rated their satisfaction at 6.04.

Why Prospects Move?



Findings from more than
77,600 prospect surveys.

41%

of prospects indicated moving
from another apartment

The reason for their move is:

33% Moving to "better apartment"	23% Change in job location	15% Other	12% Moving to a less expensive apartment
7% Dissatisfaction with management	5% Dissatisfied with the physical aspect of the old unit	3% Change in marital status (Marriage/Divorce/Break up)	1% Neighborhood going down

In our 2018 prospect surveys, J Turner Research quizzed 77,600 prospects about the reasons for moving to a new home. Close to half, 41%, indicated that they are moving from another apartment. The top three reasons for their move are: 33% reported moving because of a better apartment, 23% due to change in job location, and 15% stated other reasons such as close to family, retiring, or changing school among others.

Resident Perspective On Online Reputation

Effectiveness of Various Sources

How influential are reviews on
the following sources?



7.77

**Other Review
Sites**

(Google, Yelp, Rent.com,
ApartmentRatings.com, etc.)



6.33

Property Website



5.09

Facebook

- 0- Not Influential
- 10- Very Influential

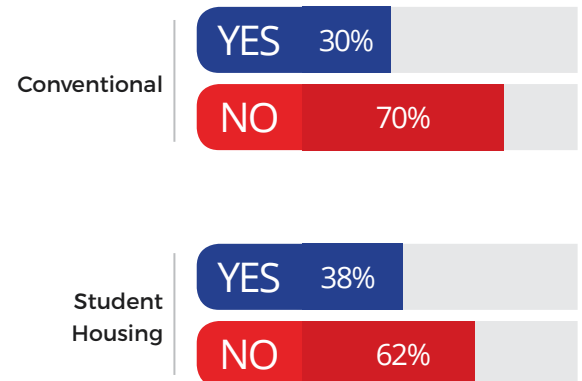
Respondents are most influenced by reviews on independent review sites as opposed to reviews posted on a property website and Facebook.

Facebook received a moderate rating of 5.09 on a scale of 0-10 (with 10 being “very influential”), even though 30% of respondents reported visiting a property’s Facebook page before leasing at a property.

Facebook for Prospect Engagement

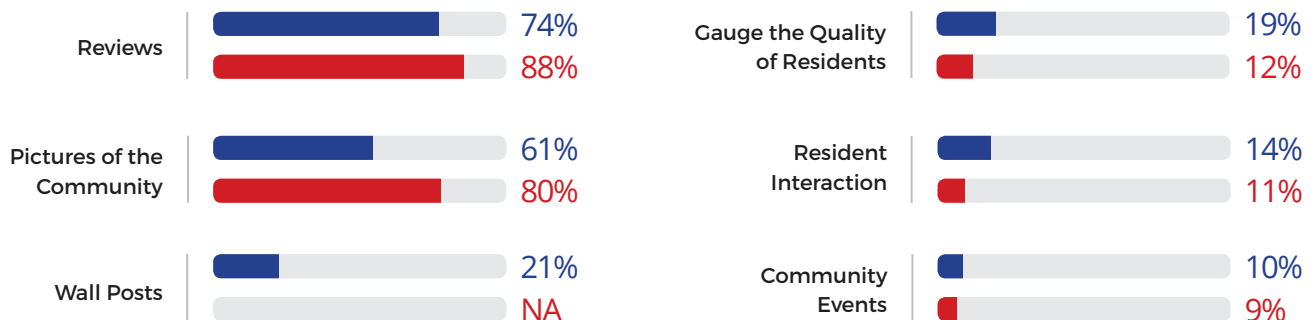
Do you visit a property's Facebook page before leasing at the property?

Our research indicates that Facebook has increased in popularity as a search medium both among conventional residents and students. According to the 2017 Internet Adventure Part II study, 11% of respondents said they utilized Facebook in their apartment search, this has jumped to 30% in 2018. Students also mirror this trend, while in August 2017², only 21% of students reported using Facebook in their apartment search, in January 2018³, this number increased to 38%.



Which aspects of the Facebook page did you pay the most attention to? (pick 2)

● Conventional
● Student Housing



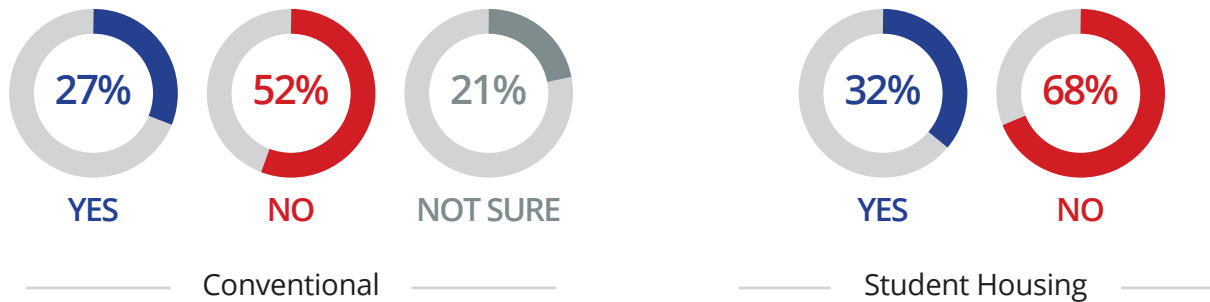
Two billion people use Facebook every month to connect with friends and family and to discover things that matter. As a property, you can share a variety of information on your Facebook page, but when residents visit your property's Facebook page, they focus largely on online reviews and pictures of your community. Students pay more attention to reviews and pictures, while a higher percentage of conventional residents are interested in assessing the quality of residents in your community.

² The Internet Adventure: The influence of online ratings on a student's decision making

³ 2018 The Evolution of Online Reputation: Do Reviews and Responses Matter?

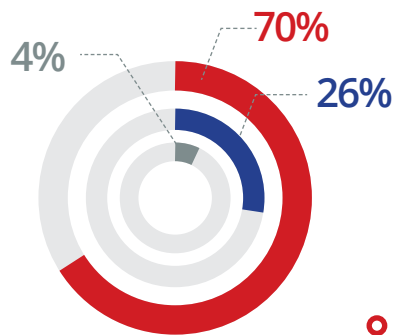
Posting Reviews

Has your apartment community asked you to post a review online?

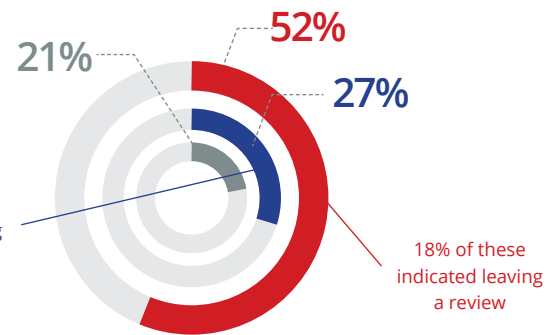


More students than conventional residents have been asked to post a review online. Thirty-two percent of students have been asked, while only 27% of conventional residents have been asked to post a review online.

Have you ever posted a review for an apartment community online?



Has your apartment community asked you to post a review online?

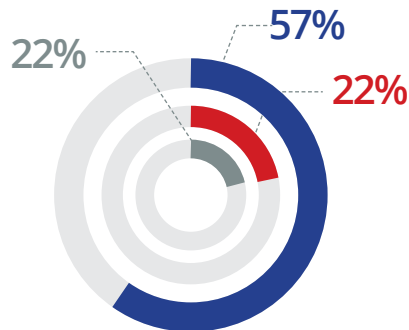


It pays to proactively reach out to residents for reviews.

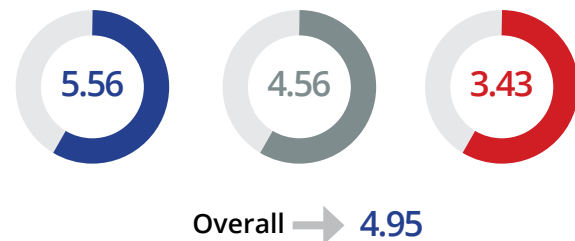
As seen earlier, residents are more likely to post a review if they are asked to. Overall, 26% of respondents indicated leaving a review, but almost half of the participants indicated reviewing a property when they were asked to post a review. Only 27% of residents recalled being asked to leave a review.

Reviews and Incentives

Are you more likely to post a review for a property, if you were incentivized in some shape or form?



How much do you trust reviews that appear to be incentivized? (On a 10-point scale)

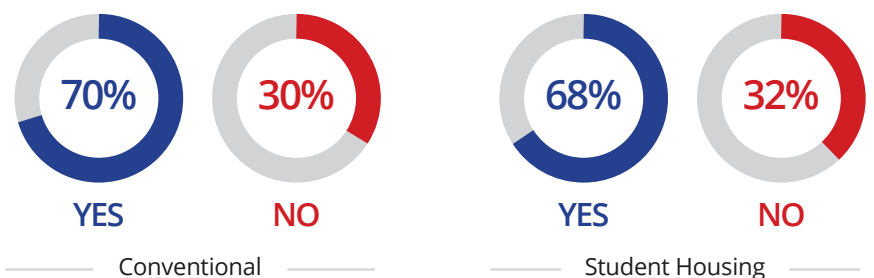


● NO ● YES ● NOT SURE

By incentivizing residents, an apartment community will get more reviews as more residents indicate a willingness to post a review, if asked. But the trust level of reviews that appear to be incentivized is low. The overall trust for incentivized reviews is only 4.95.

Influence of Manager Responses

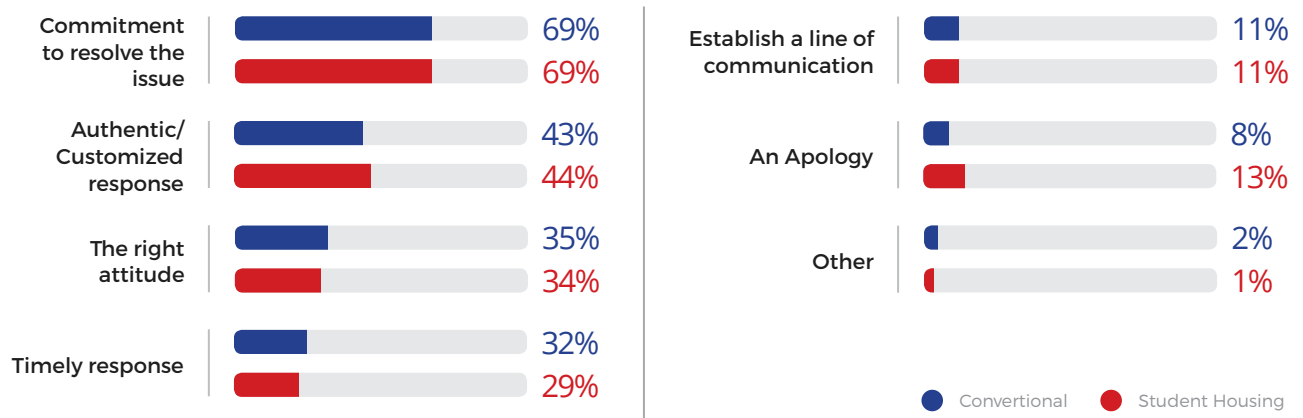
Do you look at the management's response to a review?



Residents pay attention to manager responses when researching apartments online. Conventional residents pay marginally higher attention than students to these responses. According to BrightLocal's 2017 Local Consumer Review Survey⁴, more consumers are placing importance on businesses responding to reviews, with 30% naming this as key – compared to just 20% last year.

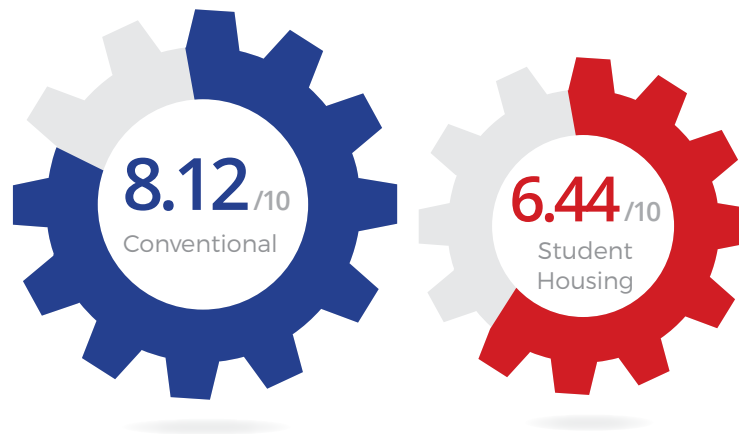
⁴ 2017 BrightLocal's Local Consumer Review Survey

What are the top two things that you look for in a response?



Residents and students reject cookie-cutter responses. Their top three expectations from a manager's response are identical: commitment to resolve the issue, authentic/customized response, and the right attitude. With regards to an apology, students seek more of an apology from managers in their responses as compared to conventional residents, who place a higher importance on timely response than students.

How much does a manager's response to a review improve your perception of the apartment?

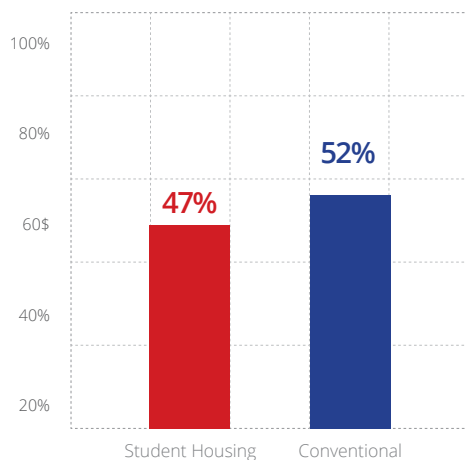


Manager responses significantly improve residents' perception of the property with conventional residents rating it at a high of 8.12 on a 10-point scale. This is 26% higher than the students' rating at 6.44.

The Impact of Online Reputation

There are many factors that go into deciding to lease at a property.

Approximately what percent of that decision would be based on online reviews?



71%

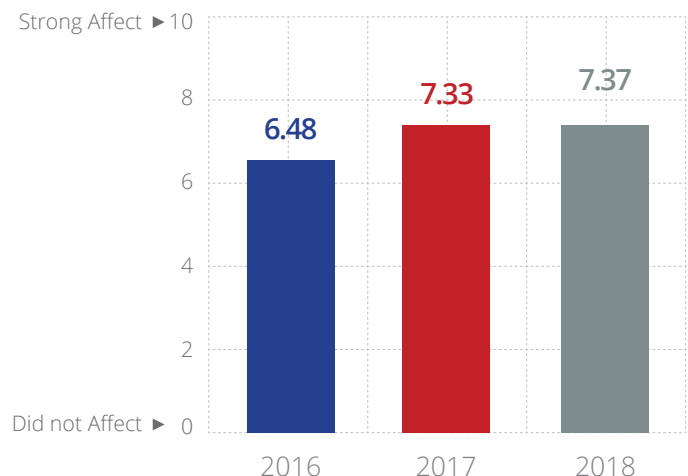
of prospects

Decided to visit a property
with a higher online reputation

Online reviews continue to influence a resident's opinion and their decision to visit or lease at an apartment community. Among conventional residents, online reviews account for 52% of the total influence of the multiple factors that affect their decision to lease at a property. This is 11% higher than students.

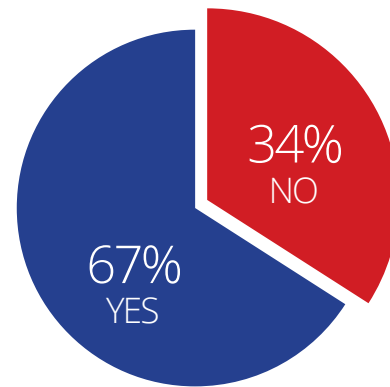
The effect of ratings and reviews on a prospect's decision to visit a property has increased marginally since 2017, but it has increased by 14% since 2016.

How much did the ratings and reviews affect your decision to visit the property?



Brand Awareness and Online Reputation

Do you know the name of the management company who manages your property?



A noticeable trend of online reviews in multifamily is naming the management company in the review comments. The results of this study lend credibility to this trend, with 67% of residents saying that they know the name of the management company that manages their apartment home.

How important is the online reputation of the company that manages your apartment home?



7.85/10

Residents ranked the reputation of the company that manages their online reputation at a high of 7.85.



How to Measure and Quantify Online Reputation



The online reputation of a company is measured and quantified by its Online Reputation Assessment (ORA™) score. J Turner Research has pioneered a statistical model to quantify online reputation. This model measures a property's online reputation using multiple review sites and establishes a single ORA™ score. This score is based on monthly online reputation monitoring of more than 78,000 properties nationwide, across 20+ review sites and ILSs. This accounts for an estimated 90% of the total apartment units in the country.

The ORA™ score is an aggregate compilation of a property's ratings across 20+ review sites. This score serves as the industry standard to compare and contrast a company's individual properties and portfolios nationally, regionally, and with competition.

For four years, in association with our media partner Multifamily Executive (MFE), J Turner Research has featured ORA™ Power Rankings – a monthly ranking of apartment properties and management companies based on their ORA™ scores.

The different rankings published include:

- Elite 1% - The annual top one percent properties by online reputation in the nation.
- Top 10 managers of the NMHC top 50 managers by online reputation
- Top properties in 50 states and D.C.
- Top properties in major MSAs.

Starting in 2018, we have launched quarterly ORA™ Power Rankings for the student housing industry. The first ranking for the year featured the Top 50 Student Housing Properties for 2017.

Resident Satisfaction and Online Reputation

	Responses	Overall Satisfaction	ORA™ Score
Company A	6674	7.93	80.76
Company B	5909	6.74	63.4
Company C	892	7.90	76.2
Company D	2855	7.36	64.5
Company E	566	7.33	82.1
Company F	939	8.18	81.2
Company G	1867	6.93	56.7
Company H	7268	7.74	76.7
Company I	4810	7.98	73.8
Company J	785	7.95	60.1
Company K	1101	7.76	74.1
Company L	2547	6.67	50.4
Company M	2254	7.57	77.1
Company N	1272	7.79	79.7
Correlation of ORA™ to Overall Satisfaction			0.69

At a statistically strong 0.69, there is a positive correlation between online reputation and residents who responded in the affirmative to being satisfied with their living experience in the community. This indicates that in most cases properties with a higher resident satisfaction have a better online reputation.

When asked how satisfied residents are with their overall living experience were, the average satisfaction was rated 7.44.

The Effect of ORA™ on Business



"Basically, what our data is showing us is that our top-ranked properties with the highest ORA™ scores need half as much traffic to close leads as compared to our bottom-performing ORA™ score properties. Properties with higher ORA™ scores produce 15% more leases. High ORA™ score properties convert to leases at 7% vs. lower-score ORA™ properties. Our normal conversion rate is about 3%. So, in case of high ORA™ score properties, it's more than double. Last year, we had about 36,000 reviews; this year, we will have more than 50,000, so it's a big and important job that takes everybody and every team member to manage. Our data shows that the top 25 properties with the highest ORA™ scores have to work half as hard to get just as many leases as the bottom 25. So, at the end of the day, we are trying to get our team members to work efficiently— to work smarter and not harder."

- Jackie Rhone, CPM, CAPS, Executive Director of Real Estate, AMO, Greystar Real Estate Partners

Greystar shared the impact of the ORA™ score on traffic to their properties, lead conversion, and application conversion.

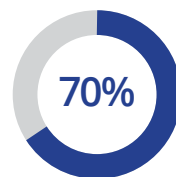
ORA™ Score and Traffic

- The Top 25 properties need half as many leads as the bottom 25 properties
- Properties with higher ORA™ scores produced 15% more leases

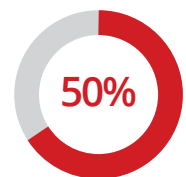
ORA™ Score and Lead Conversion

High ORA™ score properties	VS.	Lower ORA™ scores
convert at 7%		convert at 3%

ORA™ Score and Application Conversion



High ORA™ scores



Low ORA™ scores

Tiffany Alsup, Group Marketing Manager, Cardinal Group Management shared insights on the impact of incorporating ORA™ within the company culture and on prospect traffic.

Impact of ORA™ on prospect traffic

“There is definitely a correlation in traffic for our communities that have nationally high ORA™ scores. ORA™ is a looking glass into each community’s online reputation, which directly effects a prospect’s decision of whether to inquire or tour at a property. We especially see this in communities with ORA™ scores of 85+.

These communities have been able to build a solid reputation and are passionate about the customer service and resident satisfaction they provide. I think listening is key and we notice the properties who tend to stand out also provide ways for residents to interact and listen to each other through outlets such as private resident Facebook groups. Denizen, Amaranth, and Skygarden are a few that come to mind who do an amazing job of adding that personal touch and each have ORA™ scores of 95 and above.”

ORA™ as part of the company culture—it is one of the 10 KPIs for its employees

“ORA™ allows our teams to have a status quo of online reputation performance in the industry and provides a system for goal setting. ORA™ is currently part of a monthly report, along with several other metrics, our company generates that ranks all of our communities. Reporting on ORA™ allows our leadership to create accountability for online reputation management, but also creates some good ole fashion competition among the teams.

Beyond a general metric for ensuring a companywide focus on online reputation, often team members that are directly tasked with generating positive reviews and increasing ORA™ are incentivized or have bonuses contingent on the scores growth. Prior to utilizing ORA™ teams were often simply tasked with monthly positive review goals, with the hope that our positive reviews were out weighing our negative reviews. Having the ability to aggregate the yield of those efforts over multiple platforms and understand a community’s position against a national average is much more beneficial.”

Conclusion

Getting a resident to renew a lease can be an uphill task for the management company. To provide an insight into the minds of renters and how they think about renewals, J Turner Research undertook an extensive national research project - Resident Attitude Towards Renewals and Online Reputation. The study drew participation from over 39,000 residents nationwide.

The first section of the study explored resident attitudes towards renewals: the timing and communication expectations, intent to renew, and relationship with resident satisfaction. The second section looked at online reputation: how residents have evolved in their interaction with online reviews, willingness to post reviews, review source preferences, and manager responses – expectations and influence on perceptions.

Key Takeaways

- Residents who are 3-6 months into their lease are very likely to renew now at the current rate.
- Resident satisfaction is the core driving force behind renewals. For residents who are willing to renew their lease, their overall satisfaction is 35% higher than the ones who indicated that they will not renew their lease.
- The majority of the residents (79%) want to be communicated via email about renewals.
- The 5-month mark offers a good window of opportunity to approach residents about renewals. Twelve percent of residents indicated that they start considering renewing their lease six months before lease expiration.
- At a statistically strong 0.69, there is a positive correlation between online reputation and residents who responded in the affirmative to being satisfied with their living experience in the apartment community. This indicates that in most cases properties with higher resident satisfaction have a better online reputation.
- Online reviews continue to be a decisive factor in the rental process:
 - For conventional residents, out of the multiple factors that effect their decision to rent at a property, online reviews account for 52% of the total influence. For students this influence is 47%.
- Respondents rate the importance of the reputation of the management company managing their apartment community at a high of 7.85 on a 10-point scale.
- Manager responses are a decisive factor in apartment shopping.
 - More than two-thirds of conventional residents and students pay attention to manager responses while researching apartments online.
 - Manager responses significantly improve residents' perceptions of the apartment community with conventional residents rating this influence at a high of 8.12 on a 10-point scale.
- Both conventional residents and students reject cookie-cutter responses. Their top three expectations from a manager's response are identical: commitment to resolve the issue, authentic/customized response, and the right attitude.



- Facebook is gaining popularity among prospects as a search tool. The use of this social media platform has jumped 19 percentage points among conventional residents and 17 percentage points among students since 2017.
- When residents visit your Facebook page, they pay most attention to pictures. A higher percentage of students notice pictures as compared to conventional residents.
- Though the review volume has grown immensely, companies are yet to tap into the full potential. Only 27% of conventional residents and 32% of students have been asked to post a review online.
- It pays to proactively reach out to residents for reviews. Residents are more likely to post a review if they are asked to. Overall, 26% indicated leaving a review, but almost half of the participants indicated reviewing a property when they were asked to post a review.
- By incentivizing residents, an apartment community will get more reviews as more respondents indicate a willingness to post a review, if asked. But the trust level of reviews that appear to be incentivized is low. The overall trust for incentivized reviews is only 4.95.

For any questions, please contact us at research@jturnerresearch.com