BUILDING DESIGN +CONSTRUCTION

MULTIFAMILYPRO+



MULTIFAMILY AMENITIES 2023



THE TOP 127 amenities that developers, property owners, architects, contractors and builders are providing in today's apartment, condominium, student housing and senior living communities

EXECUTIVE SUMMARY

KEY FINDINGS

- Multifamily developers and their AEC teams are innovating when it comes to providing desirable amenities to tenants in apartments, condominium clients, students in academic housing, and seniors in senior living communities. They have responded to many of the difficulties posed by the Covid pandemic with fresh ideas and bold approaches.
- After site location and rental/purchase cost, offering the right mix of amenities remains the key selling point for new and renovated multifamily housing, whether rental apartments, condominiums, student housing, or senior living communities.
- New options, such as interactive fitness services and dog exercise stations, are coming online all the time, adding to the complexity of making the right choices as to the best mix of amenities to provide.

PURPOSE

- TO DETERMINE the degree to which 127 amenities have been provided by multifamily developers, property owners, architects, contractors, and builders in the U.S. and Canada over the previous 24 months, and to compare those findings to data from Multifamily Amenities Surveys in 2017, 2019, and 2021.
- TO DOCUMENT new categories of amenities not studied in previous surveys, such as touchscreen fitness mirrors, sports equipment storage rooms, and pickleball courts.
- TO NOTE THE INNOVATIONS which the multifamily design and construction sector has implemented in providing amenities for occupiers in the last 12-24 months.

METHODOLOGY

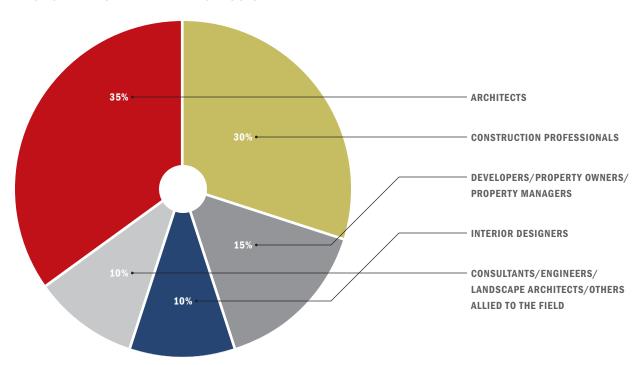
- An 11-question survey was sent four times digitally via QuestionPro over a three-week period in June and July 2023 to developers, property owners, property managers, architects, interior designers, landscape architects, builders, construction professionals, and other professionals in the design and construction of multifamily communities (apartments, condominiums, townhomes, student housing, senior living) in the U.S. and Canada.
- The list was derived from qualified subscribers to Building Design+Construction, Professional Builder, and Multifamily Pro+ e-newsletter. Respondents were offered the opportunity to participate in a drawing for one of 10 \$100 gift cards for completing the survey. No other financial incentive was offered.
- A total of 141 industry professionals completed the survey.
 Respondents spent an average 7-8 minutes on the survey.
 A projectable trend line of the 2019 results was reached at about 101 responses.

BY THE NUMBERS

RESPONDENTS STATED THAT THEIR FIRMS PRODUCE ONE OR MORE MULTIFAMILY HOUSING TYPOLOGIES IN A TYPICAL YEAR:

- A clear majority of respondents (55%) said their firms produce 500 or more apartments or condominiums per year; 13% produce 250-499 units/year; 26% produce less than 250 units/year.
- Thirteen percent produce 500 or more senior living units/year; 9% produce 250-499 senior living units/year; 21% produce less than 250 senior living units/year.
- Fourteen percent produce 500 or more student housing units/year; 6% produce 250-499 student housing units/year; 15% produce less than 250 student housing units/year.

RESPONDENTS' PRIMARY PROFESSION



AMENITIES BRING LIFE TO THE \$135 BILLION MULTIFAMILY SECTOR

EVERY OTHER YEAR SINCE 2017 THE EDITORS HAVE SURVEYED MULTIFAMILY DEVELOPERS, ARCHITECTS, DESIGNERS, CONTRACTORS, AND OTHERS IN THE \$135 BILLION MULTIFAMILY SECTOR TO DETERMINE WHICH AMENITIES THEY HAD USED IN THE LAST 12-18 MONTHS.

OUR EXCLUSIVE 2023 MULTIFAMILY AMENITIES SURVEY FOLLOWS ON SIMILAR STUDIES CONDUCTED IN 2017, 2019, AND 2021.

MULTIFAMILY DEVELOPERS AND THEIR AEC FIRMS ARE INNOVATING

We asked respondents to let us know what innovations or fresh concepts they had tried in recent projects. Here's a rundown of some of the more intriguing responses.

EV charging stations, solar power, smart appliances, and maker spaces were the choices of several respondents. "We are moving toward all-electric buildings throughout our 14-state portfolio," said one developer.

"Larger, nicer co-working spaces" garnered support from one respondent. But another said their firm was nixing communal co-working spaces in favor of designing work-from-home spaces right in the apartments.

HOT DESKS, ROCKY WALLS, WET BARS

One respondent said their firm was designing co-working spaces that included "hot desks," small day offices, multiple conferences rooms, a wetbar, and phone booths for private calls. This developer predicted that "this feature will soon approach the preference rating for fitness centers" among work-from-home residents and self-employed individuals.

Active leisure amenities advanced. One respondent was installing rock walls in its communities. Another had opened its fitness centers for 24/7 access. Yet another added exercise stations to their walking trail.

Several said dedicated pickleball courts were becoming de rigueur in their communities. (To build them right, see "Pickleball, anyone?" at: bdcnetwork.com/pickleball-anyone) One developer had provided "private fitness pods" for smaller groups. Another had put in "beer walls"; that's "active leisure," isn't it?

LEARNING THE NEEDS OF DISABLED RESIDENTS

Residents with accessibility concerns benefited from one developer: "We've been meeting with disabled residents to learn more about their daily needs," said this respondent, who was going "above and beyond code" with accessible design.

One respondent had implemented automated parking, another "intelligent" parking. Yet another was offering individual detached garages to tenants.

"Interactive smart kiosks" were on one respondent's innovations list. Yet another was using an online property maintenance platform.

Entertainment venues were a hit with some. One team installed a roof deck with gazebo. Another was putting in private dining areas.

Amenities for the arts also got some love. One respondent had built a green room for residents to record video shorts. Another put a "book share box" near the mailboxes. Music rooms were the choice of some project teams.

ENVIRONMENTAL, PERSONAL COMFORT CONCERNS

The use of sustainable materials (though not enumerated) scored with one respondent. Another said, "Mass timber is making a play in the market." "Environmental cleaning" (not defined) was the choice of one firm. Yet another had installed a system to recycle rainwater to be used in the cooling tower for ventilation purposes.

Creature comforts were important to some respondents. One firm added drinking water fountains to its senior living homes. An apartment designer broadened their balconies to six feet in width instead of four feet. A developer in Honolulu offered "multiple furniture options" in its downtown high-rise. To "stay competitive with adjacent properties" one developer upgraded unit finishes and lighting.

"Grab-and-go convenience stores" within the amenity space not vending machines!—were being put in place by one firm.

In terms of security innovations, respondents reported installing electronic unit deadbolts. One developer was installing ring cam security cameras in every unit. Yet another had installed a keyless entry system in an assisted living facility.

GET THE DESIGN RIGHT, FROM THE START

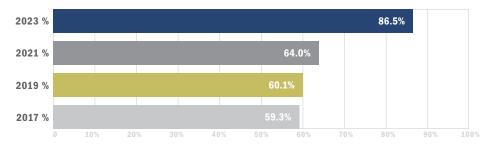
One consultant to multifamily developers and AEC teams issued this warning: "Floor plan designs and unit features are more important than amenities in the leasing decision! Great amenities will not overcome a poor to average unit design."

Another consultant advocated for creating "a community feel"—rather than "just a place to live"—and recommended that multifamily developers and AEC teams move television screens, games, and billiards under the club room porch—outside, but protected from the weather. "Many clubhouses close around 6:00 when most renters are returning from work, so this can serve as an outdoor gathering area."

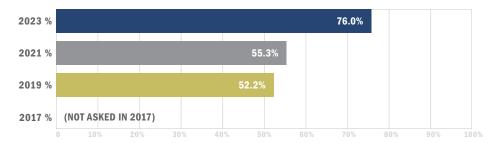
The final word from this respondent: "Design the structure to be as efficient as possible first, then make the unit and amenity layouts fit around it."

TOP TEN OUTDOOR AMENITIES

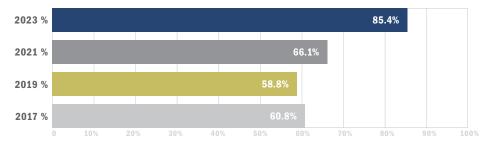
OUTDOOR LOUNGE



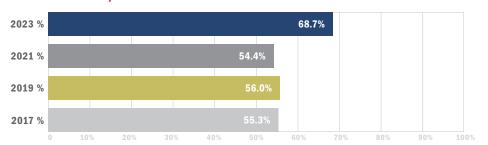
COVERED PARKING



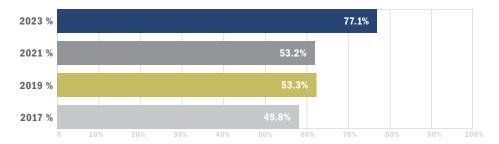
FIRE PIT/GRILL



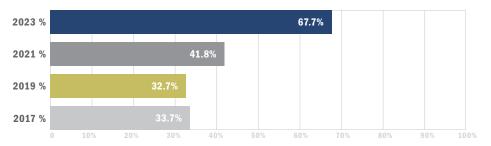
ROOFTOP DECK/TERRACE



OUTDOOR POOL

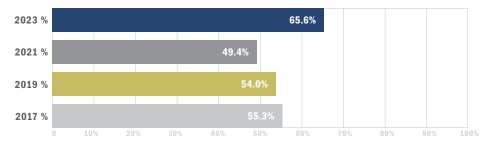


CABANAS

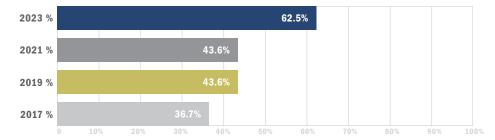


TOP TEN OUTDOOR AMENITIES

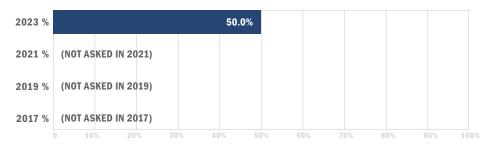
GARDEN WALK/WALKING PATH



OUTDOOR COMMUNITY KITCHEN

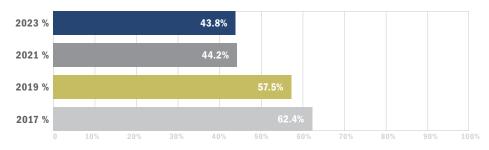


GAZEBO



IF YOU'RE NOT OFFERING YOUR RESIDENTS OUTDOOR LOUNGES, FIRE PITS, ROOFTOP DECKS AND TERRACES, AND OUTDOOR POOLS (EVEN IN COLD CLIMATES!), YOU MAY BE MISSING THE BOAT.

OUTSIDE STORAGE LOCKERS



COMMUNITY GARDENS/URBAN FARMS

FELL JUST OUT OF THE TOP 10 OUTDOOR AMENITIES BUT STILL HAD A STRONG SHOWING, AT 42.7%.

OUTDOOR MOVIE SCREENS

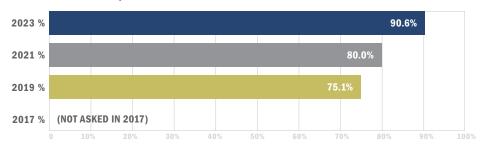
WERE UP TO 26.0%. FROM 15.8% IN 2021.

OTHER OUTDOOR AMENITIES

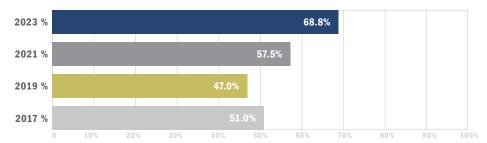
OUTDOOR JACUZZI (37.5%), SCREENED PORCH (19.8%), AND CATERING PANTRY (14.6%).

TOP TEN INDOOR AMENITIES

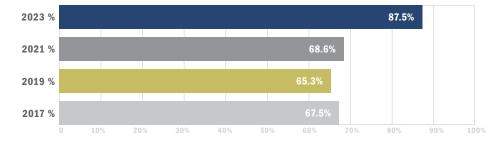
IN-UNIT WASHER/DRYER



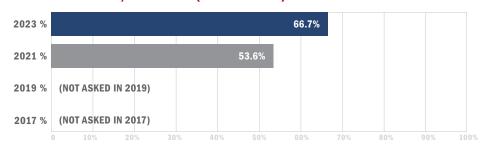
COFFEE BAR/CAFÉ



INDOOR LOUNGE



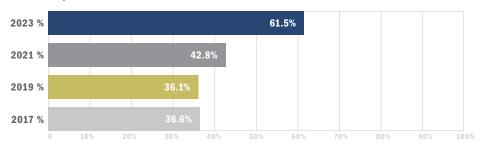
INSIDE STORAGE/LOCKERS (NOT IN UNIT)



INDOOR COMMUNITY KITCHEN

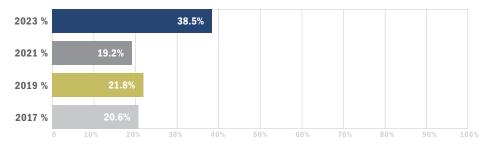


LIBRARY/READING ROOM

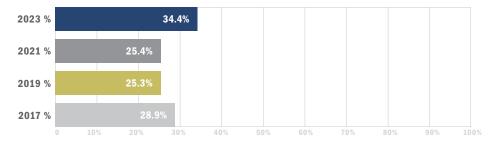


TOP TEN INDOOR AMENITIES

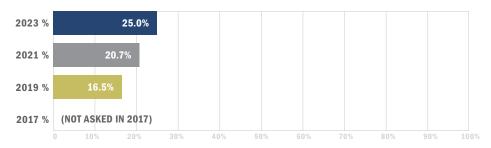
TV/FILM SCREENING ROOM



CATERING AREA

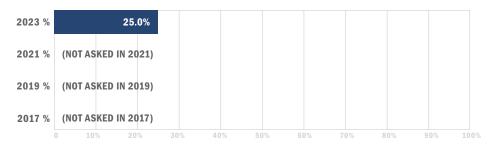


WINE BAR



THE SHORTAGE OF WASHERS, DRYERS, AND OTHER APPLIANCES CAUSED BY THE PANDEMIC SEEMS TO BE OVER, ACCORDING TO ANECDOTAL REPORTS.

SPORTS GEAR STORAGE ROOM



GATHERING PLACES

LIKE LOUNGES, COMMUNITY KITCHENS, AND COFFEE BARS ARE CRUCIAL FOR ESTABLISHING A SENSE OF COMMUNITY AMONG OCCUPIERS.

FOR THE FIRST TIME, WE ASKED RESPONDENTS

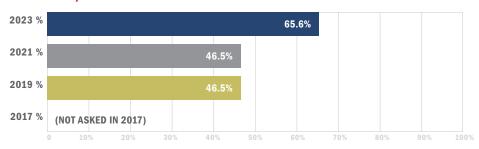
IF THEY HAD SET UP A "SPORTS GEAR STORAGE ROOM," AND A FOURTH OF THEM (25%) SAID YES— ANOTHER INDICATION OF THE DEMAND FOR ACCOMMODATING ACTIVE LIFESTYLES AMONG TENANTS.

OTHER INDOOR AMENITIES

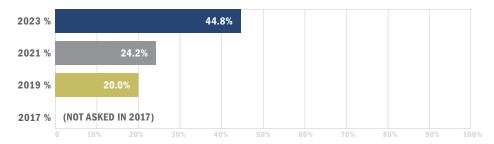
MUSIC/PERFORMANCE ROOM (21.9%), JUICE BAR (14.6%), WINE CELLAR (14.6%), AND INDOOR JACUZZI (12.5%).

TOP TEN RECREATION AMENITIES

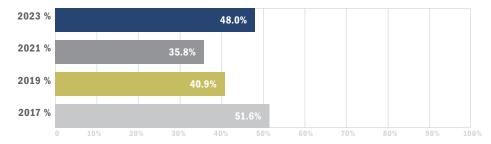
BILLIARDS/POOL



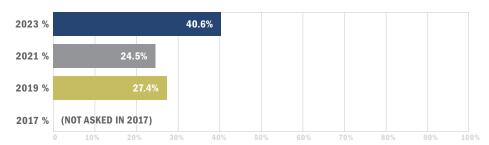
CORNHOLE



GAME ROOM/ARCADE/SIMULATOR



BOCCE COURT



JOGGING/WALKING PATH

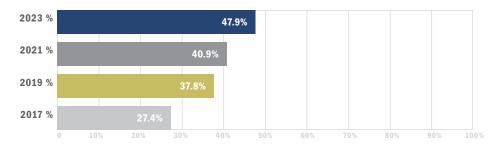
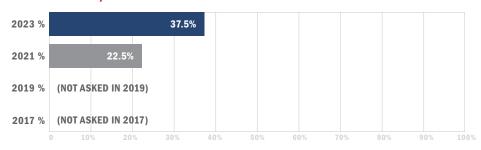


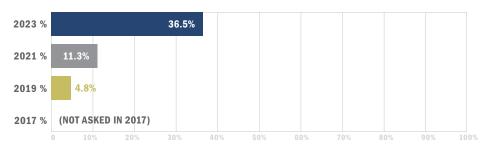
TABLE TENNIS/PING PONG



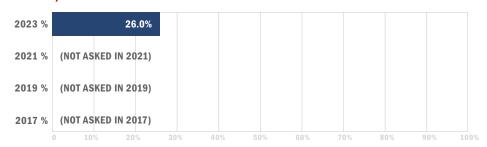
TOP TEN RECREATION AMENITIES

PICKLEBOARD MANIA IS PUSHING TENNIS TO THE SIDELINES, BUT WILL THE CRAZE OUTLAST PICKLEBALL PLAYERS' KNEES?

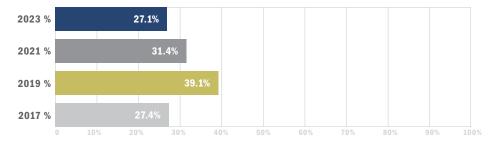
DEDICATED PICKLBALL COURT



CHESS/CHECKERS TABLES



BASKETBALL/VOLLYBALL COURT



SPIN STUDIOS (24.0%) AND PUTTING GREENS (21.9%)

CONTINUED TO SHOW SUPPORT FROM RESPONDENTS.

CLIMBING/BOULDERING/ROCK WALLS

SOUND LIKE FUN, BUT ONLY ONE OF NINE RESPONDENTS (11.5%) SAID THEY HAD INSTALLED THEM IN MULTIFAMILY PROJECTS.

PICKLEBALL COURTS

STRIPED ON EXISTING TENNIS COURTS GARNERED 6.3% SUPPORT, IN ADDITION TO THE 36.5% OF RESPONDENTS WHO SAID THEIR FIRMS HAD BUILT DEDICATED PB COURTS.

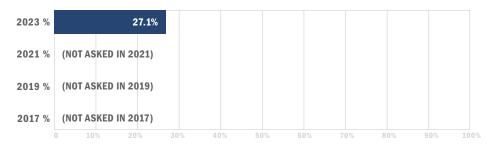
CROQUET AND RACQUETBALL/SQUASH COURTS

BROUGHT UP THE BOTTOM OF THE PACK. TIED AT A MERE 3.1% SHOWING.

OTHER RECREATION AMENITIES

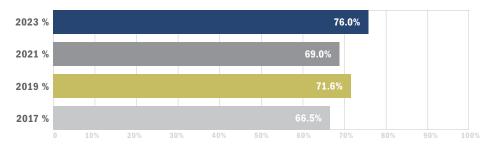
TENNIS COURT (14.6%), DANCE ROOM (11.5%), AND BOWLING ALLEY (7.3%), AND HORSESHOES (6.3%).

SHUFFLEBOARD

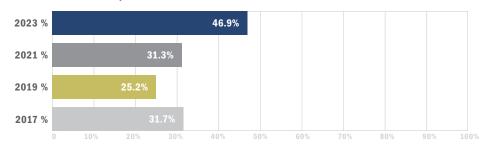


TOP TEN CONVENIENCE SERVICES

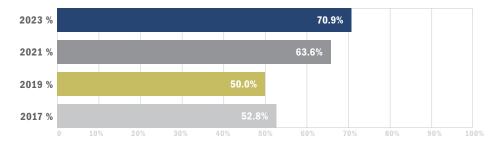
SECURED BIKE STORAGE



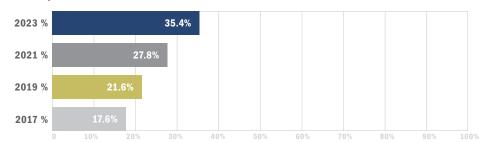
BICYCLE REPAIR/MAINTENANCE



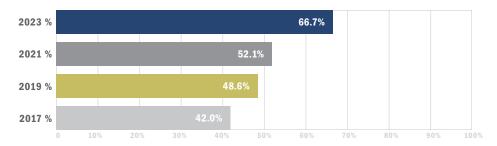
INBOUND PACKAGE SERVICE



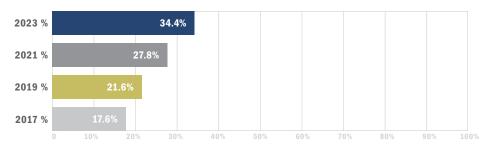
UBER/LYFT WAITING AREA



EV CHARGING STATION



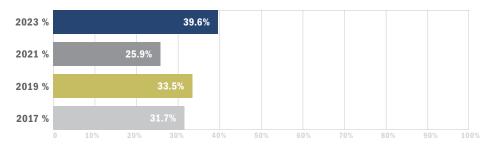
OUTBOUND PACKAGE SERVICE



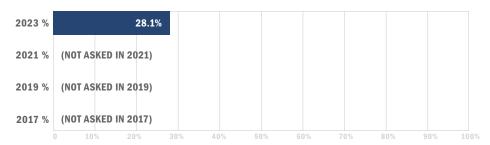
TOP TEN CONVENIENCE SERVICES

BICYCLES AND PACKAGES CONTINUE TO DOMINATE THE MULTIFAMILY SERVICES MENU. BUT VALET TRASH SERVICE? CAN'T TAKE OUT YOUR OWN GARBAGE? REALLY?

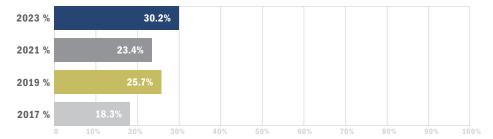
CONCIERGE SERVICE



VALET TRASH SERVICE



DRY CLEANING/LAUNDRY SERVICE



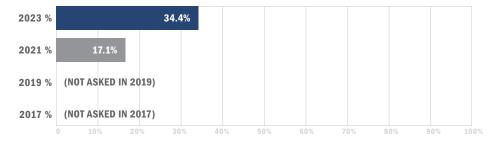
WHILE THE PROVISION OF GROUND-FLOOR RETAIL SPACE

IS COMMON IN MANY APARTMENT COMMUNITIES (AND SOME STUDENT HOUSING), PROVIDING A CONVENIENCE STORE IN THE BUILDING WAS IMPLEMENTED BY JUST ONE IN SEVEN RESPONDENTS (14.6%).

CAR-RELATED SERVICES,

OTHER THAN EV PORTS (INSTALLED BY TWO-THIRDS OF RESPONDENTS), RANKED LOW—VALET PARKING (12.5%), CAR WASH SERVICE (10.4%), AND CAR-SHARE SERVICE (10.4%)—ESPECIALLY COMPARED TO TRANSIT ACCESS TO RAIL, BUS (26.04%).

REFRIGERATED FOOD DELIVERY LOCKERS



MAID SERVICE (6.3%) AND MEDICAL/DENTAL OUTPATIENT SERVICES (4.2%)

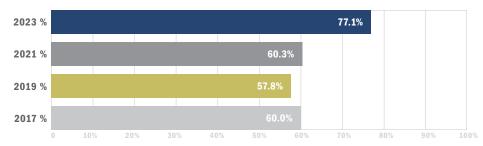
WERE RARELY INCLUDED IN RESPONDENTS' PROJECTS.

OTHER CONVENIENCE SERVICES

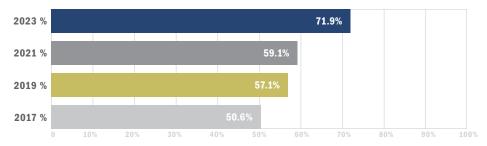
BEAUTY SERVICES (17.7%), CO-LIVING/SHARE APARTMENTS (15.6%), BICYCLE SHARING (11.5%), AND BOAT-KAYAK-CANOE SERVICES (6.3%).

TOP TEN QUALITY OF LIFE AMENITIES

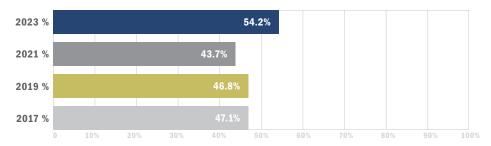
MEETING ROOM/PARTY ROOM



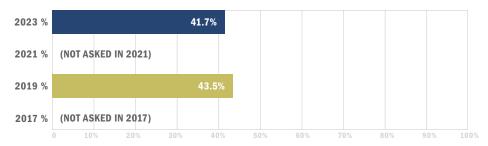
FITNESS/PILATES/YOGA STUDIO



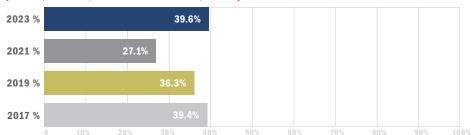
RECYCLING SERVICE



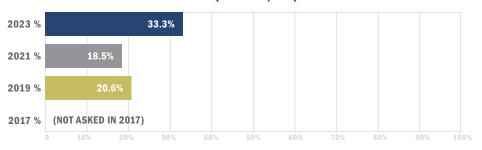
WATER FEATURES (FOUNTAINS ETC.)



GREEN BUILDING CERTIFICATION (LEED, NGBS, GREEN GLOBES, ETC.)



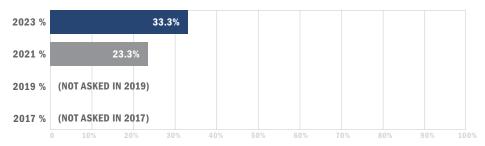
INTERACTIVE FITNESS SERVICE (ONLINE/TV)



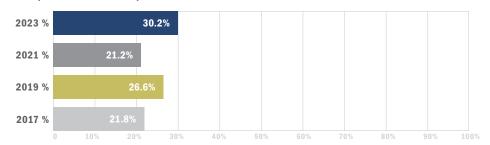
TOP TEN QUALITY OF LIFE AMENITIES

WORKOUT CLASSES OF ALL KINDS—PILATES, YOGA, PELOTON, AEROBICS, WHATEVER—ARE MORE POPULAR THAN EVER, NOW THAT OCCUPANTS FEEL SAFER EXERCISING IN GROUPS.

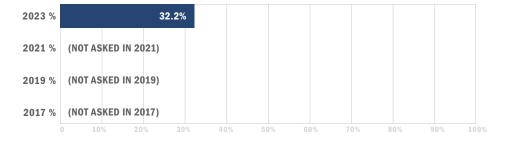
PELOTON EQUIPMENT



SPA/HEALTH CLUB/SAUNA



TOUCHSCREEN FITNESS MIRROR



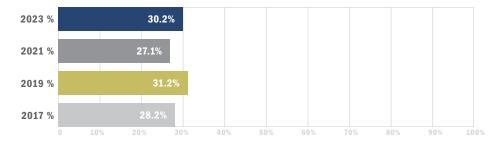
GREEN BUILDING CERTIFICATION

BOUNCED BACK (39.6%) TO LEVELS SEEN IN 2017 AND 2019.

CERTIFICATION UNDER THE WELL BUILDING STANDARD (14.6%)

SEEMS TO BE STRUGGLING FOR ACCEPTANCE BY MULTIFAMILY TEAMS, EVEN WITH ALL THE PUBLICITY ABOUT INDOOR HEALTH ISSUES ARISING FROM THE PANDEMIC. SIMILARLY FOR WELLNESS GARDENS/FENG SHUI GARDENS (14.6%), PHYSICAL THERAPY ROOMS (9.4%), AND CIRCADIAN LIGHTING (8.3%)—ONLY MARGINAL BUY-IN.

YOGA/AEROBICS/WELLNESS CLASSES



WATER, WATER, EVERYWHERE

TANKLESS WATER HEATERS (27.1%), RAINWATER COLLECTION SYSTEMS (18.8%), AND WHOLE-BUILDING WATER PURIFICATION SYSTEMS (11.5%) ACHIEVED MODEST ADOPTION LEVELS.

COOKING CLASSES/CHEF DEMONSTRATIONS (28.1%),

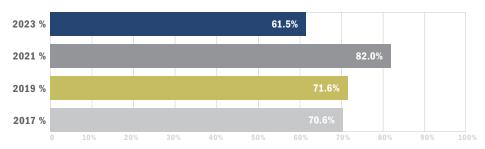
VERY POPULAR IN SENIOR LIVING COMMUNITIES, FELL OUT OF THE TOP 10 BUT WERE UP FROM 2021 (20.9%) AND 2019 (20.7%).

OTHER LIFESTYLE AMENITIES

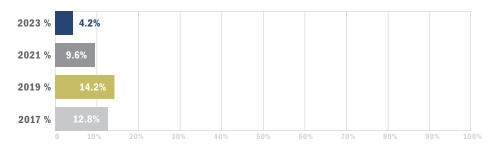
ART GALLERIES (18.8%), MEDITATION ROOMS (18.8%), EDUCATION/SPEAKER PROGRAMS (14.6%), AND ART/MUSIC CLASSES (8.3%).

TOP FIVE CHILDREN'S SERVICES

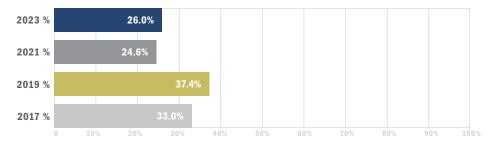
PLAYGROUND



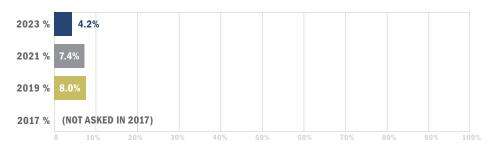
CHILDCARE SERVICE



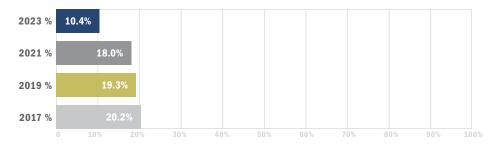
PLAYROOM



BABY STROLLER STORAGE



ON-SITE DAYCARE CENTER

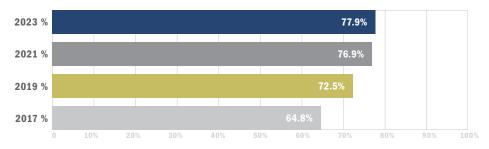


THREE OF FIVE RESPONDENTS (61.5%)

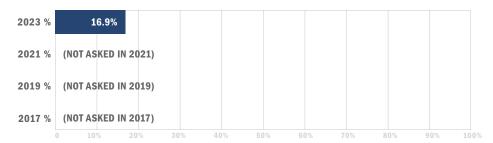
SAID THEY HAD BUILT A PLAYGROUND ON THEIR SITE—A SIGNIFICANT PERCENTAGE, CONSIDERING THAT SENIOR LIVING AND STUDENT HOUSING COMMUNITIES HAVE NO CHILDREN IN RESIDENCE (TECHNICALLY SPEAKING, THE 17-YEAR-OLDS IN COLLEGE HOUSING ARE STILL CHILDREN, BUT THEY'LL OUTGROW IT SOON).

TOP FIVE SERVICES FOR PETS

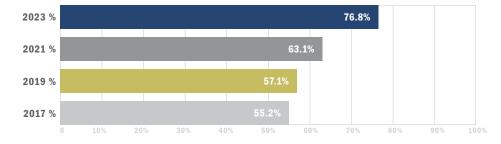
DOG PARK



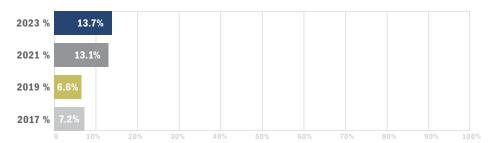
DOG EXERCISE STATION



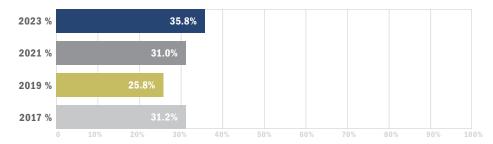
DOG WASH STATION



PET GROOMING SERVICE



DOG WATER FOUNTAIN



DOGS NEED EXERCISE,

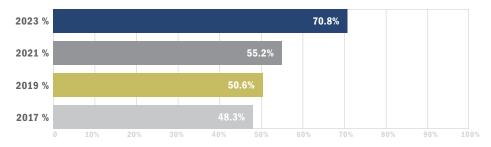
JUST LIKE HUMANS, SO ONE-SIXTH OF RESPONDENTS (16.9%) ADDED DOG EXERCISE STATIONS TO THEIR APARTMENT COMMUNITIES. GIVE ME 20 PUSHUPS, FIDO!

OTHER PET-RELATED SERVICES

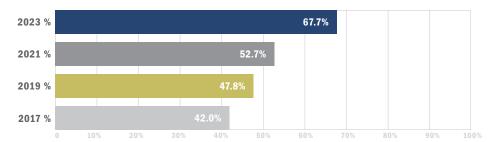
DOG WALKING (9.5%) AND OVERNIGHT CARE (1.0%).

TOP TEN BUSINESS + TECHNOLOGY SERVICES

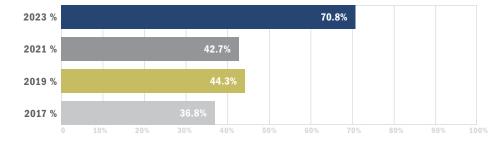
CONFERENCE ROOM



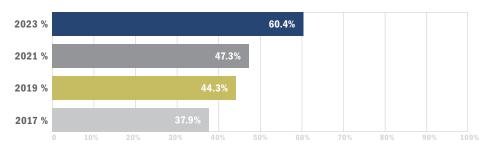
BUSINESS CENTER



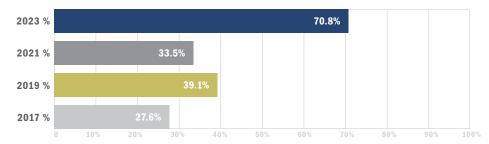
COMPUTER LOUNGE



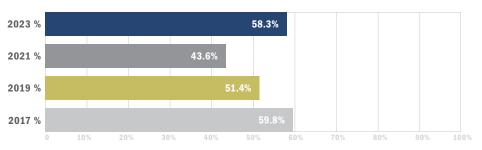
HIGH-SPEED FIBEROPTIC SERVICE



CO-WORKING/WORKSHARE SPACE

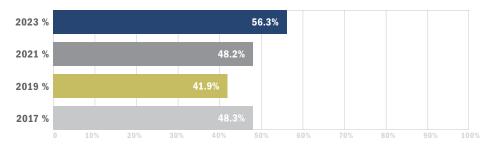


FREE WI-FI

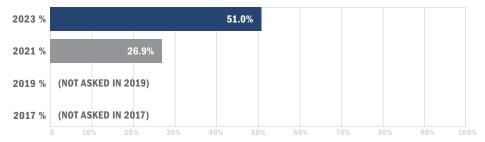


TOP TEN BUSINESS + TECHNOLOGY SERVICES

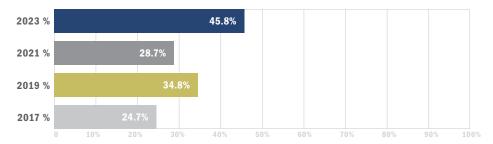
INDIVIDUALLY METERED UTILITIES



MEDIA ROOM/MEDIA CENTER

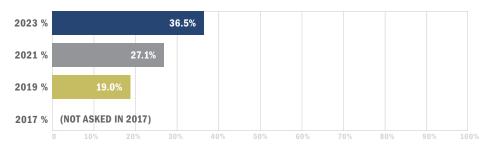


SMART HOME TECHNOLOGY



THERE'S PROBABLY SOME OVERLAP BETWEEN CONFERENCE ROOMS, COMPUTER LOUNGES, CO-WORKING SPACES, MEDIA ROOMS, AND BUSINESS CENTERS, BUT THEY'RE ALL BEING EMPLOYED IN RENTAL, STUDENT HOUSING, AND SENIOR LIVING COMMUNITIES.

PAID WI-FI



WORKSPACE CUBICLES (34.3%)

JUST MISSED MAKING THE CUT FOR TOP 10 BUSINESS/TECH SERVICES.

FREE WI-FI WAS POPULAR

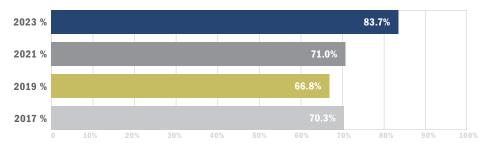
WITH RESPONDENTS (58.3%), PAID WI-FI LESS SO (36.5%).

MAKER SPACES/INNOVATION CENTERS/INCUBATORS (27.1%)

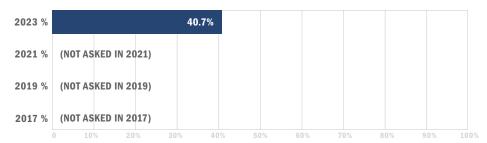
AND PHONE-CHARGING STATIONS (25.0%) GOT RESPECTABLE NUMBERS.

TOP TEN SECURITY SERVICES

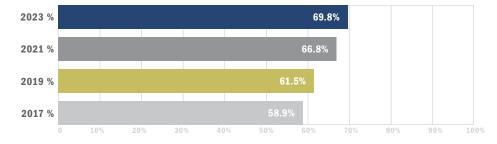
KEYLESS ENTRY (CARD, FOB, QR, ETC.)



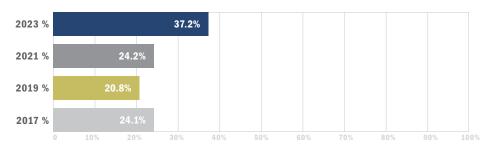
24/7 EMERGENCY SERVICE



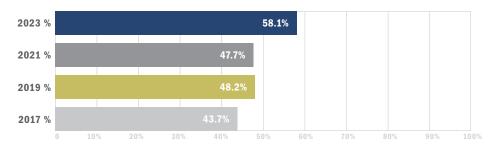
CCTV VIDEO SURVEILLANCE SYSTEM



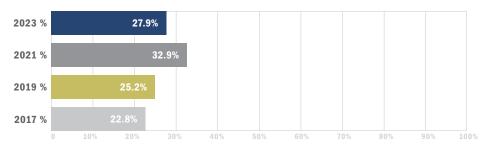
RE-KEYABLE LOCK SYSTEM



ELECTRONIC KEY MANAGEMENT SYSTEM

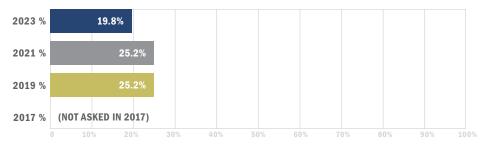


WIRELESS ENTRY SYSTEM

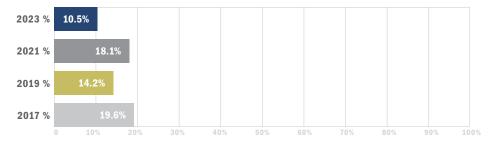


TOP TEN SECURITY SERVICES

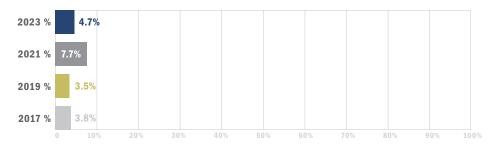
PRIVATE ENTRY (TO PRIVATE UNIT/AREA)



PRIVATE ELEVATOR (TO PRIVATE UNIT/FLOOR)

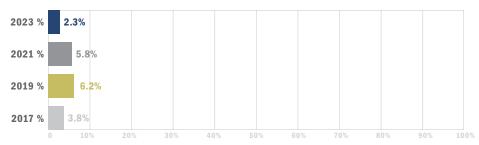


VOICE-ACTIVATED SECURITY SYSTEM



ELECTRONIC SECURITY SYSTEMS ARE THE WAY TO GO FOR THE GREAT MAJORITY OF MULTIFAMILY, STUDENT HOUSING, AND SENIOR LIVING DEVELOPERS AND PROPERTY MANAGEMENT FIRMS.

BIOMETRIC/IRIS RECOGNITION



ROUND-THE-CLOCK EMERGENCY SERVICE

(A NEW CATEGORY FOR OUR 2023 SURVEY) WAS PROVIDED BY MORE THAN 40% OF RESPONDENTS.

BIOMETRICS/IRIS RECOGNITION AND VOICE-ACTIVATED SYSTEMS

ARE STILL WELL IN THE MINORITY IN TERMS OF IMPLEMENTATION.

GREAT SECURITY RESOURCES

CHECK OUT "MULTIFAMILY SECURITY DESIGN TIPS FROM FOUR CERTIFIED SECURITY PROFESSIONALS," AT <u>WWW.BDCNETWORK.COM/BDCU/COURSE/MULTIFAMILY-SECURITY-DESIGN-TIPS-FOUR-CERTIFIED-SECURITY-PROFESSIONALS</u>, AND ADVICE FROM WORLD-CLASS MULTIFAMILY SECURITY EXPERT MIKE SILVA, CPP, AT <u>WWW.SILVACONSULTANTS.COM</u>.

AMENITIES RESPONDENTS USED FOR THE FIRST TIME

- Art studio
- Barista/reception desk
- Climbing walls
- Food delivery storage
- · Furnished units with Murphy beds
- · Golf driving range
- · Golf simulator
- Meditation room
- · New shelving units
- · On-demand fitness
- Organics composting
- Outdoor moving screen
- · Paid Wi-Fir art and cooking classes
- Pet relief area
- · Rentable party spaces
- · Salt room

COMING IN 2024!

PROCONNECT 2024 SCHEDULE

ProConnect events bring developers, architects, contractors, and home builders to meet with building product manufacturers and suppliers for one-on-one discussions about upcoming projects—and to learn about new products and technical solutions for their projects.

PROCONNECT SINGLE FAMILY (WINTER)

February 5-7, 2024 Daytona Beach, FL

PROCONNECT MULTIFAMILY (SPRING)

April 15-17, 2024 Fort Lauderdale, Fla.

PROCONNECT SINGLE FAMILY (WITH NAHB)

May 6-8, 2024 Washington, D.C.

PROCONNECT HEALTHCARE/EDUCATION

July 22-23, 2024 Nashville, Tenn.

PROCONNECT SINGLE FAMILY (FALL)

September 11-13, 2024 Denver, Colo.

PROCONNECT MULTIFAMILY (FALL)

October 16-18, 2024 Denver, Colo.

PROCONNECT AEC GIANTS

December 10-11, 2024 Austin, Texas

FOR MORE INFORMATION

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