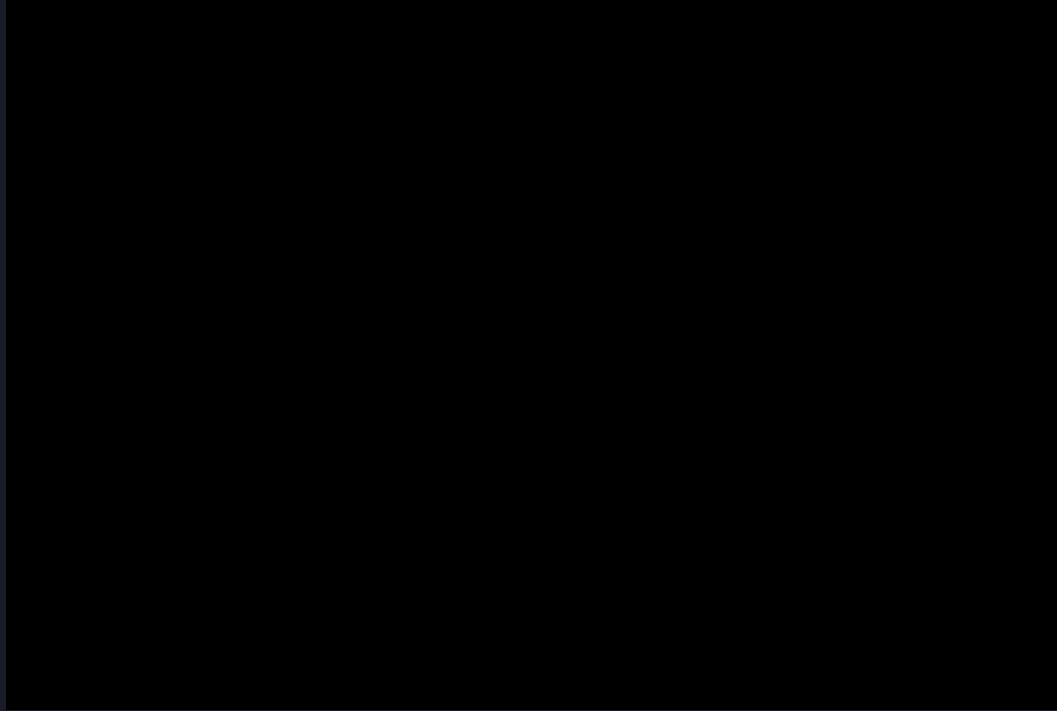


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Digible Summit
September 30, 2020





Agenda



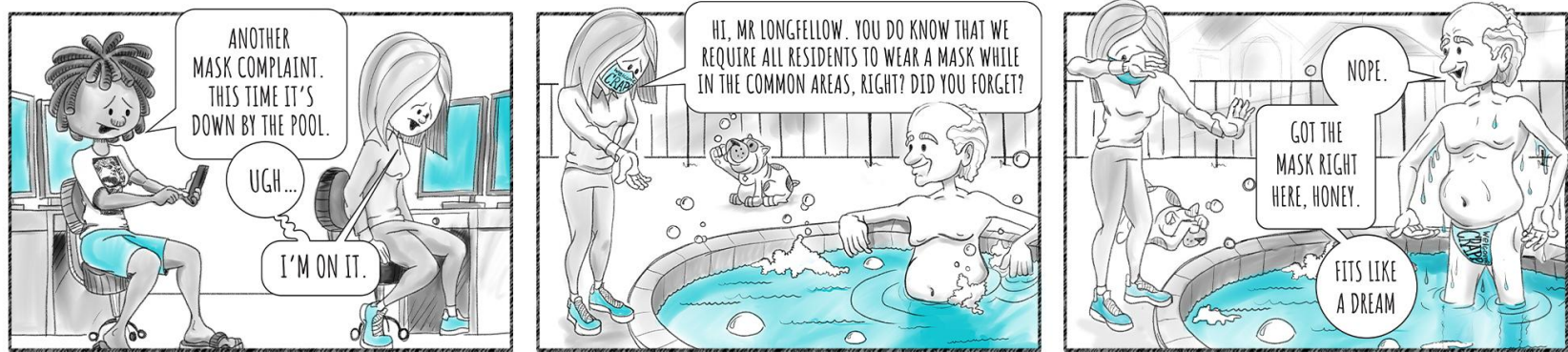
- Opening Comments
- Ice Breaker
- State of the Industry
- Call Analytics | DialogTech
- Workshop | Mastermind
- Lunch Break | Speed Networking
- Ad Fraud | Rebel.AI
- Round Table | Marketing Perspectives
- Closing Remarks

9:00am MST
Opening
Comments



What Now?! ... The Mask Complaint

WHAT NOW?! A COMIC STRIP FROM DIGIBLE



9:15am MST
Ice Breaker



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9:30am MST

State of the Industry

David Staley
President &
Co-Founder, Dignale



Reid Wicoff
CEO & Co-Founder,
Dignale



State of the Industry



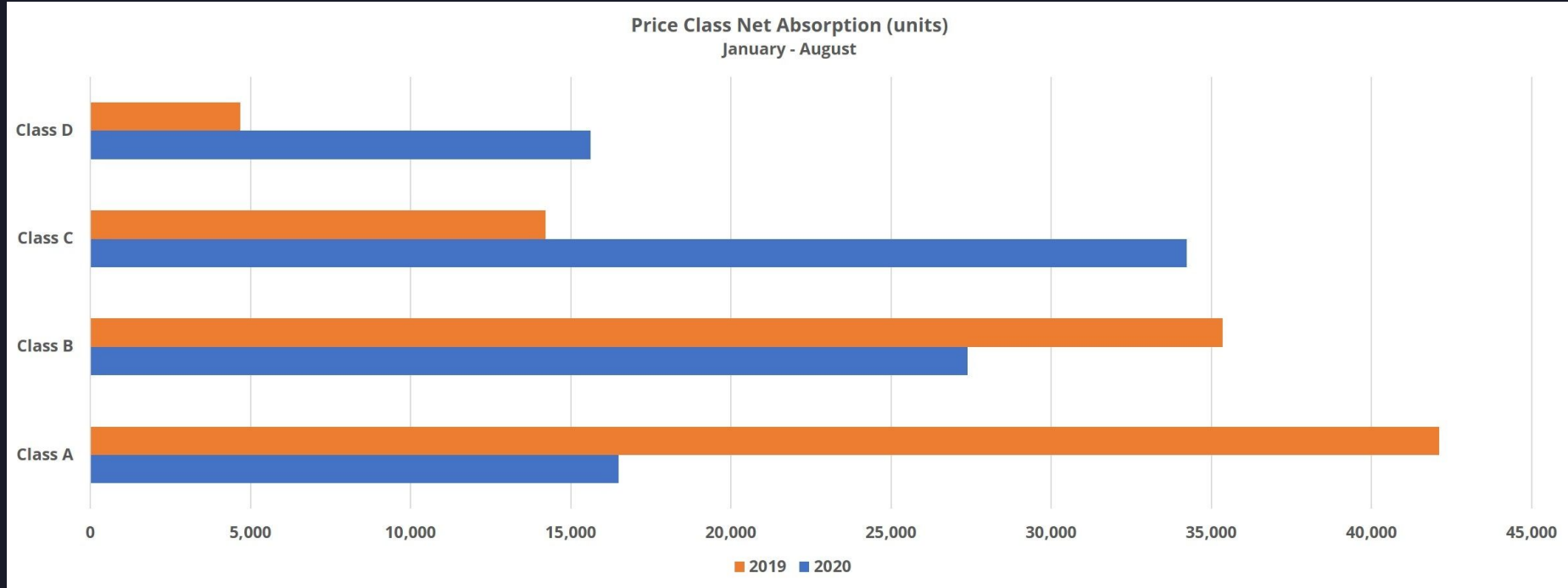
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Broad Strokes

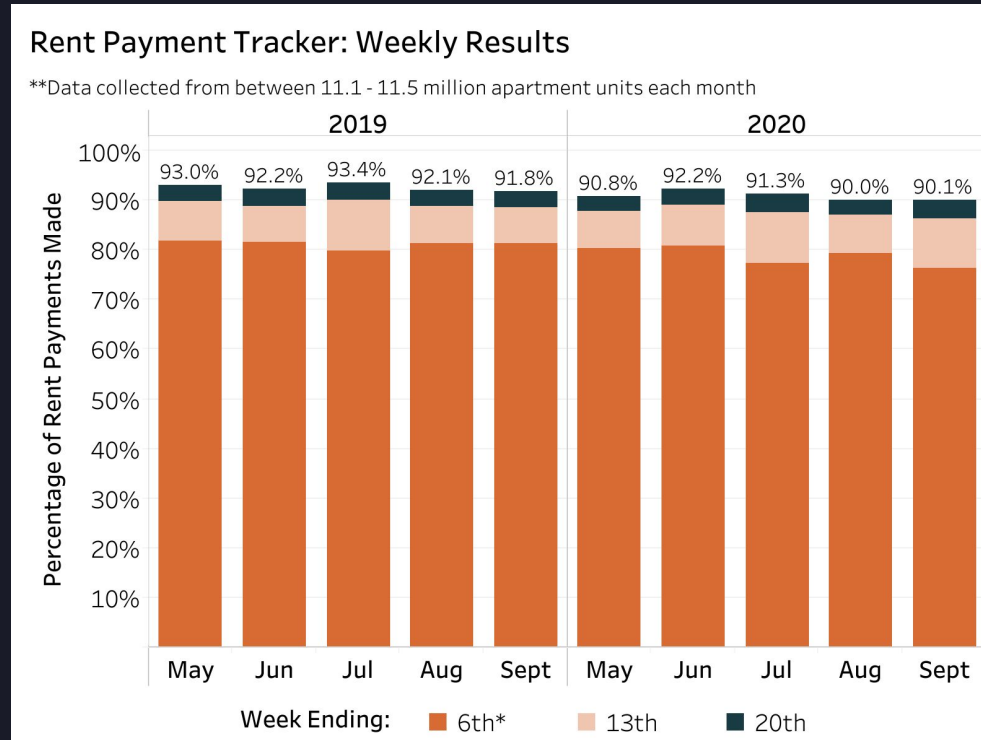


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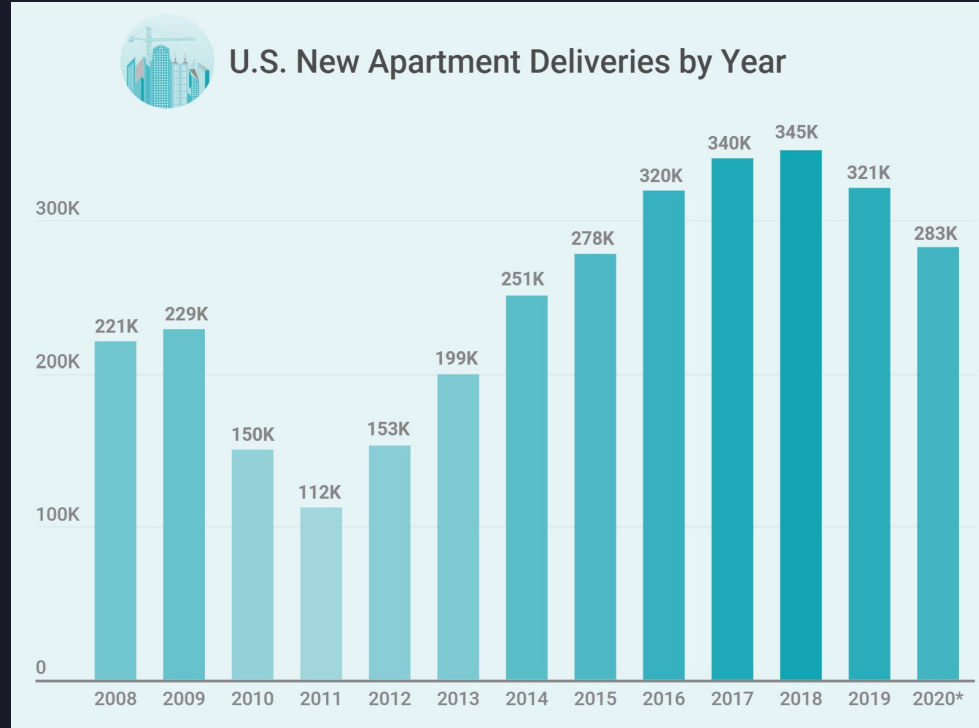
YoY Occupancy up 0.3% June - August



September Rent Collection Down 1.7% YoY



New Construction down 12% YoY



Concessions:

- Double since Feb (16.2% to 30.4%)
- Up 17.9% YoY
- Median Rent Concession is 6 wks (11.5% discount)
- Notable Increases YoY:
 - *Charlotte, NC: 29.4% to 53%*
 - *Austin, TX: 15.3% to 47.1%*
 - *Washington D.C.: 27.4% to 57.5%*



TourTech

Jennifer Cyphers
Pynwheel, CEO



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Property Manager

Lisa Odle,
Bucking Horse Apts



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Chatbots

Robert Turnbull

Better Bot, President



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CRM/LMS

Ian Andrews

PowerPro, CEO



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Digital Marketing



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What Now?! ... The TikTok

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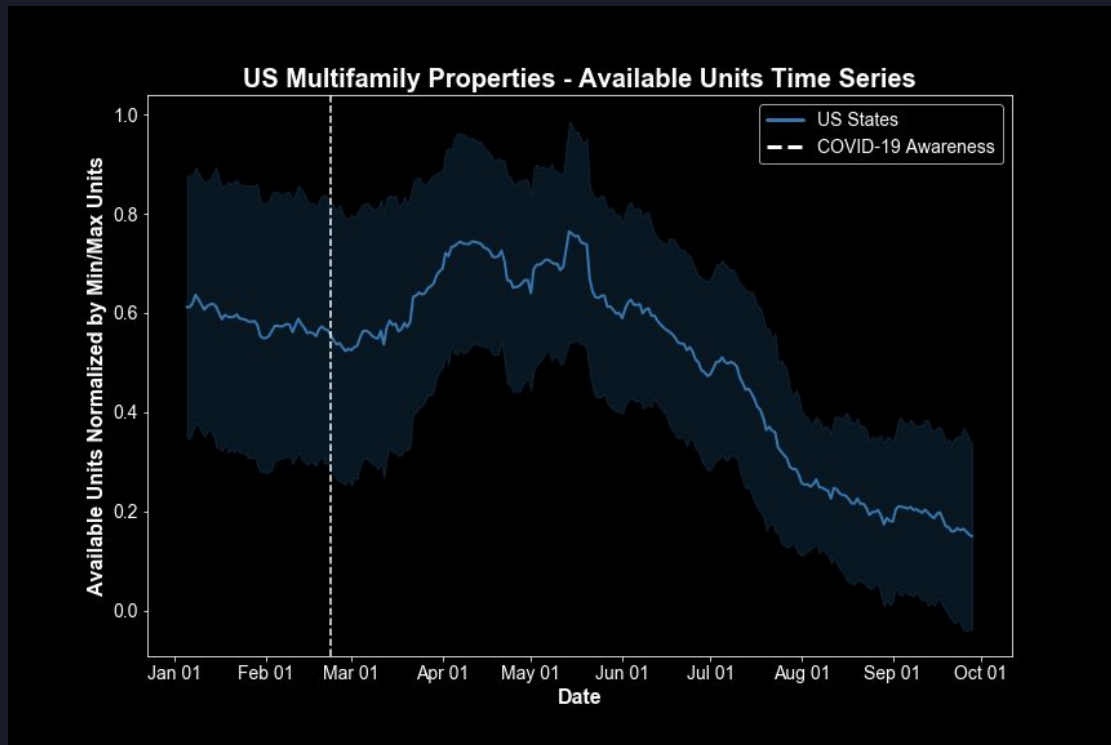
Marketing Headlines

- **Costar Announces RentPath Acquisition**
- **Knock Announces \$12 Million Series B Round**
- **LeaseLabs Announces Flex Demand Optimizer**
- **G5 Announces Partnership with BetterBot (G5 Bot)**
- **Nestio Rebrands as “Funnel Leasing”**
- **WPromote Launches The Ad Creative Bank**
- **Zumper raises \$60 Series D**
- **Digible Launches ILX**

Leasing Trends

Multifamily Inventory

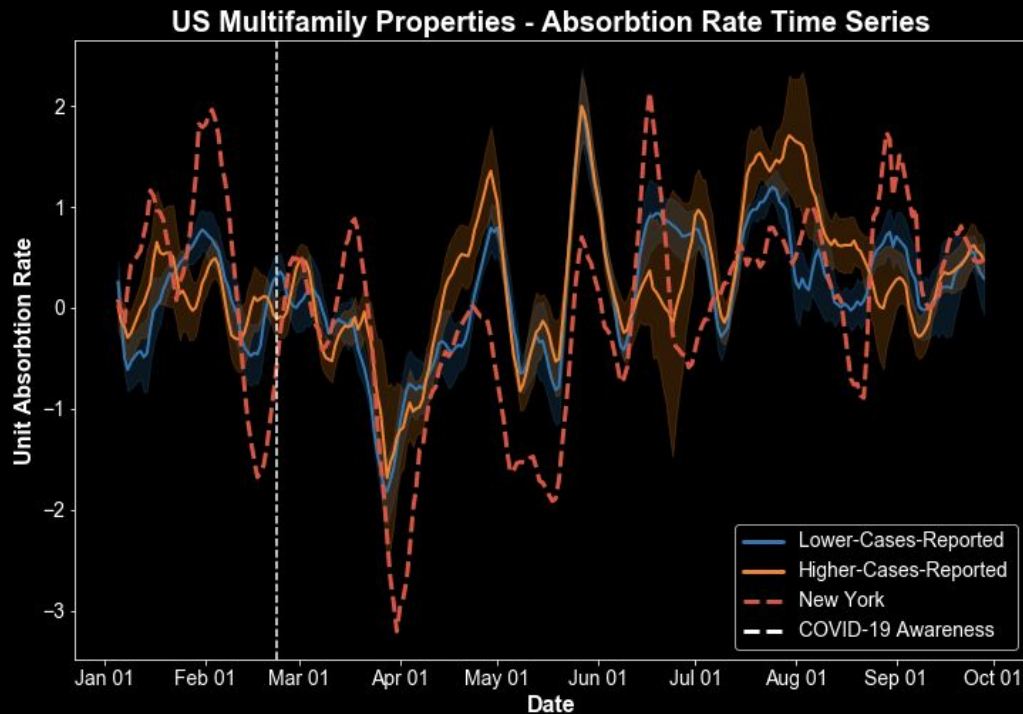
- Sample properties units available went from 1,170k to 1,091k over this entire period (YTD)
- Headline inventory decrease mirrors decrease in median inventory per state
- By state the lowest available unit states (relative - YTD): TX, FL, NC, VA, CO
- By state the highest relative available unit states (relative - YTD): DC, NE, WA, MA, TN



Leasing Trends

Absorption Rate in States

- Where the CDC has higher reported cases, no discernible trend on absorption rate, through time
- This includes states: NY, FL, GA, LA, TX*, NC*, CA, WA
- We explicitly plot New York as an example



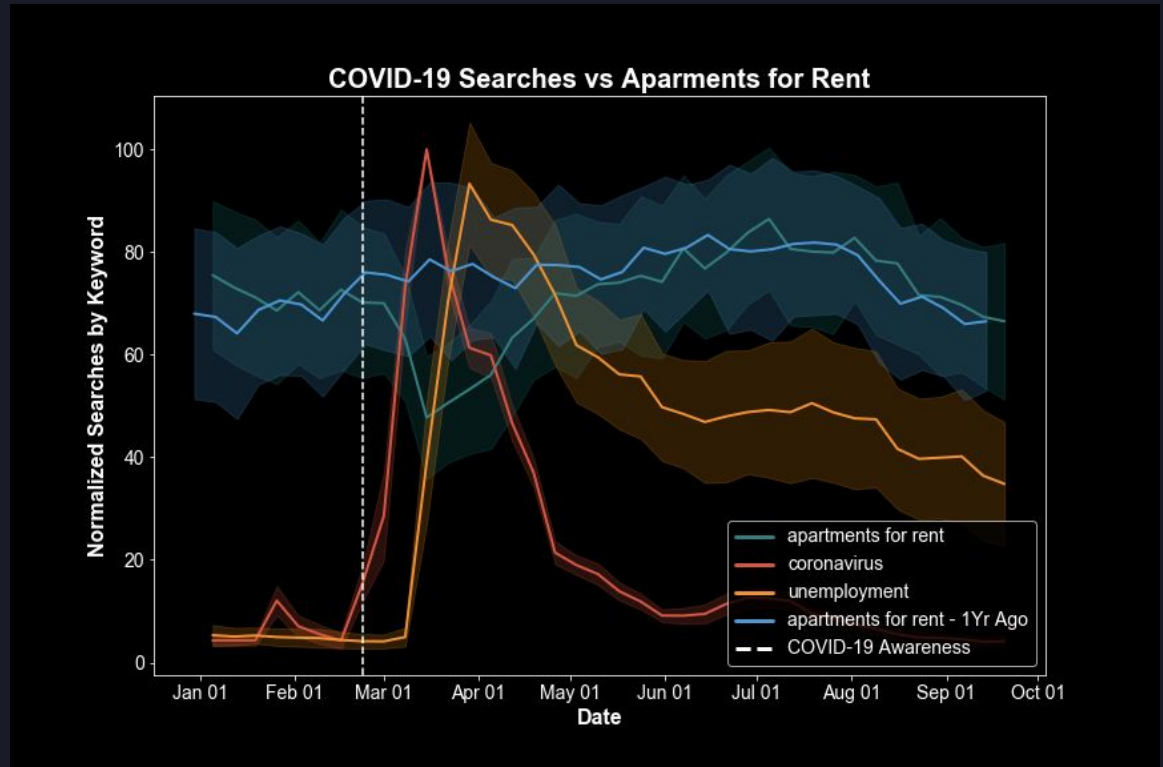
Marketing Impact



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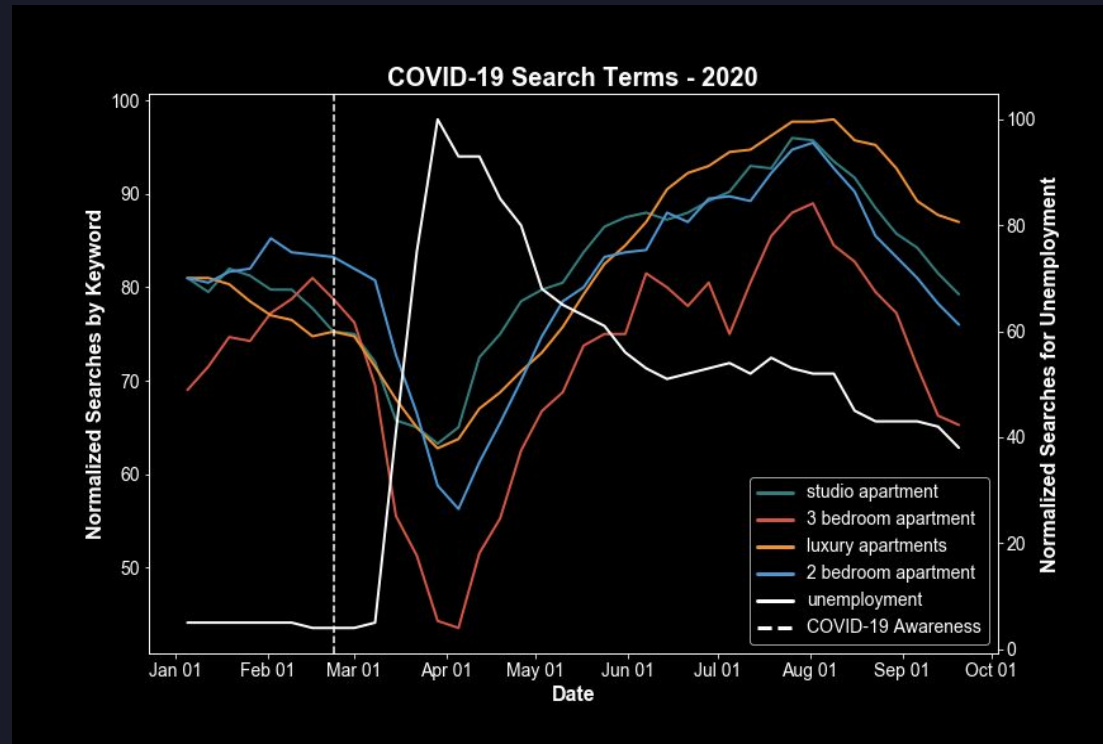
Search Volume

- “Apartments for Rent” line is the normalized average number of searches across US
- “Coronavirus” and “Unemployment” are used for comparison
- Decrease in apartment search volume across the US by about 25% after our control date, however :
- Search interest is trending lower for “unemployment” and lower for “coronavirus”
- Apartment searches are now back to pre-crisis levels, and appear to be following seasonal trends



Search Volume

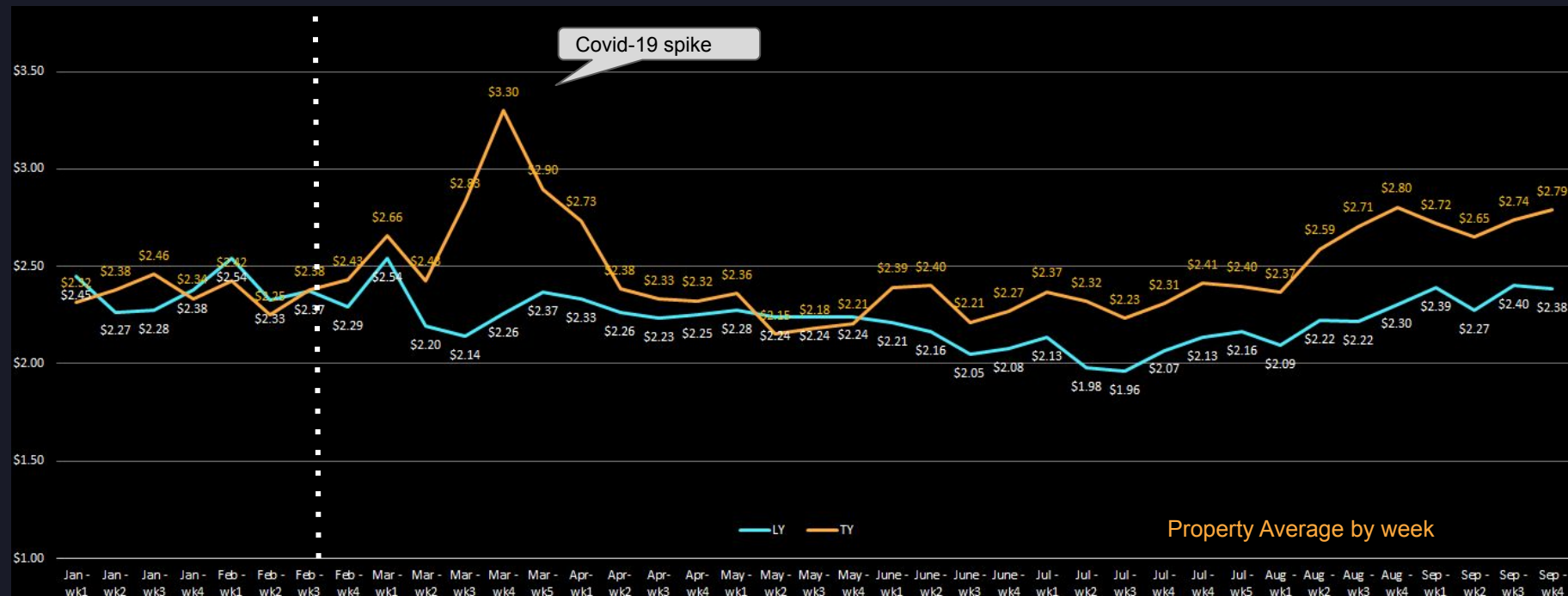
- two bedroom / three bedroom searches fell most Q1/Q2
- All unit types rebounded and resumed a more seasonal trend post Q1
- Luxury searches decline the least vs other unit types in august & september



Campaign Performance

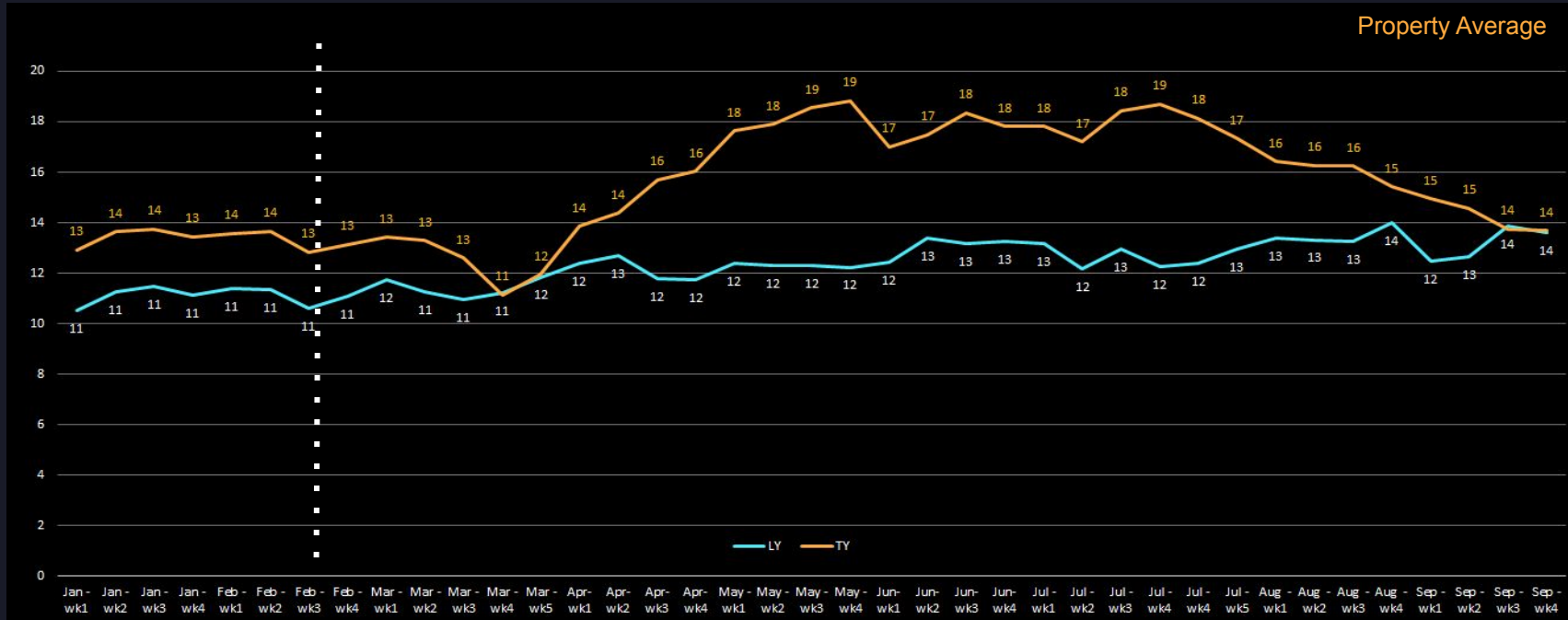
Cost Per Click Trends: Year over Year January - September MTD

- Non-Branded Cost per Click (CPC) is up 11% YoY vs the Covid-19 outbreak pre-period



Website Traffic - *Lower Funnel Page Views

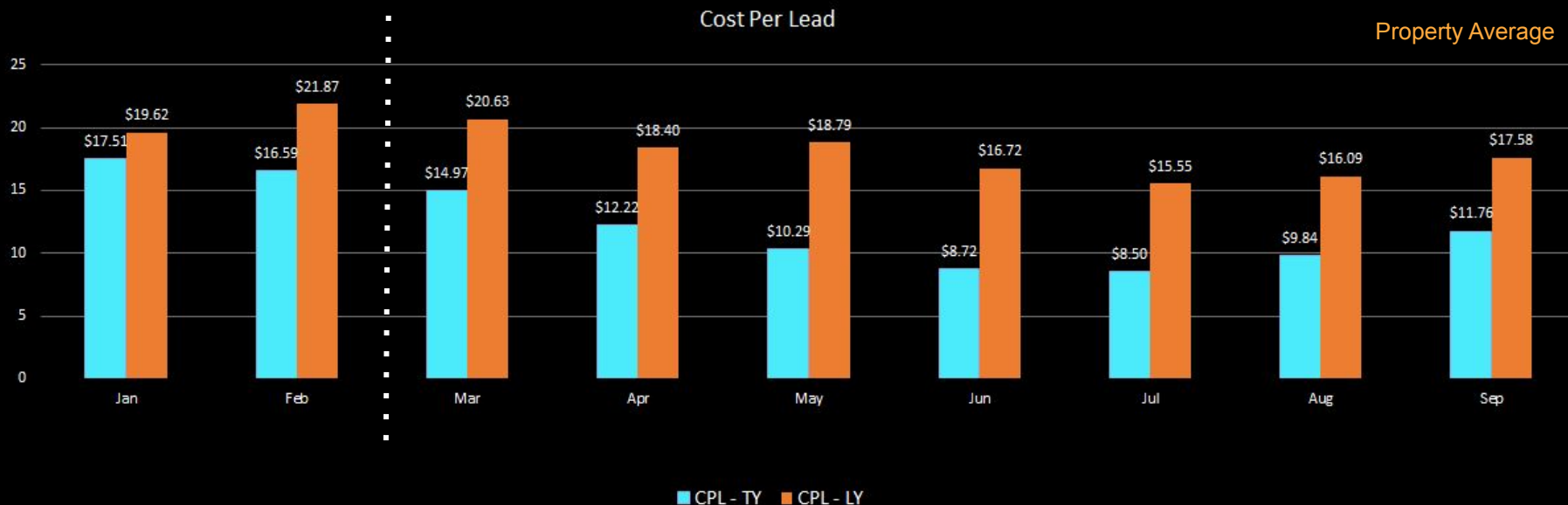
- Floor Plan engagement experienced an immediate dip at the start of the Covid-19 outbreak but is up 6% year over post the Covid-19 outbreak



Campaign Performance

Search Cost Per Leads

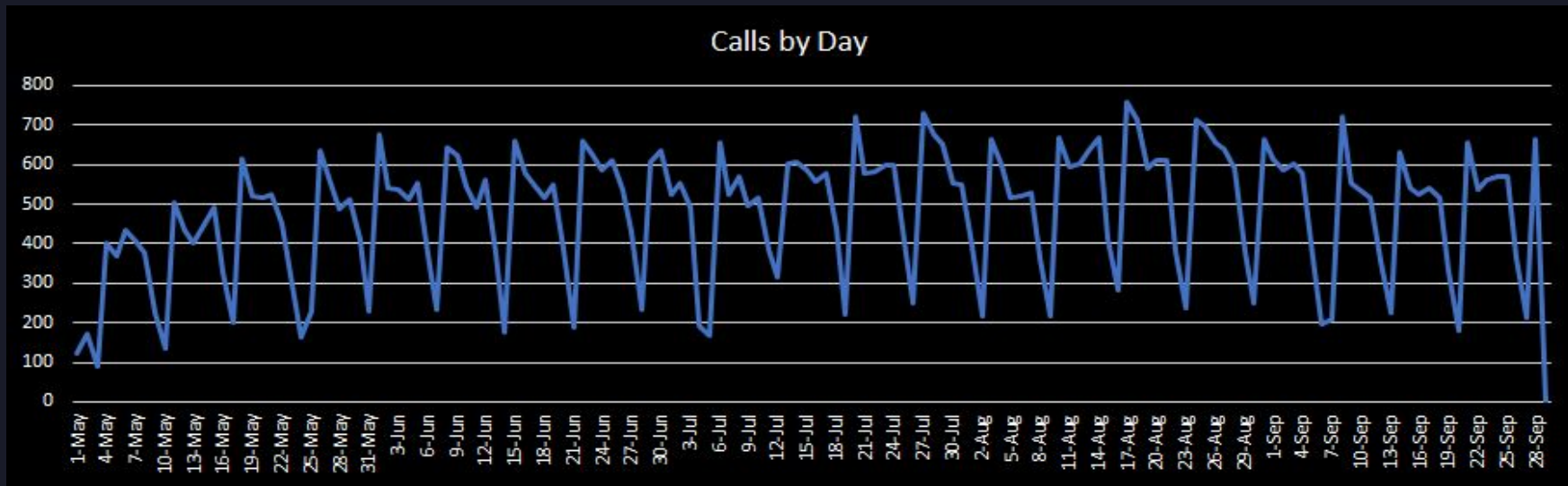
- CPL has decreased at steady rate, is down year over year, and currently following seasonal trend



Campaign Performance

Call Analytics

- Despite a 10% decrease in call volume over the past 30 days, missed call rates have increased by 5%
- Over the past 30 days <1% of nearly 15,000 calls have referenced COVID-19



Marketing Strategy



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Marketing Funnel



Comparing Post COVID data to Pre COVID data we have seen increases in both the upper funnel and lower funnel CTR. There is no doubt that COVID had a major impact on digital marketing however when you look at these stats it is what you would expect from a seasonality perspective.

COVID-19's Effect on Reviews

Review Snapshot

01/01/2020 - 09/28/2020

vs

01/01/2019 - 09/28/2019



6,604
Positive
36% ↓



416
Neutral
52% ↓



2,201
Negative
51% ↓



What Now?! ... The Marketing Plan

WHAT NOW?! A COMIC STRIP FROM DIGIBLE



10:30am MST

Call Analytics w/ DialogTech

Marty Pankau
SVP of Revenue,
DialogTech



Chris Henger
Chief Product Officer,
DialogTech



What Now?! ... The Cougars

WHAT NOW?! a comic strip from DigiBLE



11:30am MST Mastermind Session



David Staley
President & Co-Founder, Digible

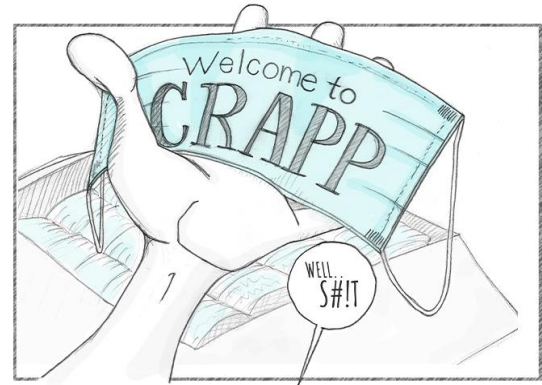


Mastermind Groups

- 1. Budgeting** (*Michelle Reinold*)
 - *How you are planning 2021 budgets vs prior years?*
- 2. Adapting to COVID-19** (*Isobel Parish*)
 - *Virtual Tours, website changes, process changes, etc.*
- 3. Changes for 2021** (*Reid Wicoff*)
 - *Large strategy changes, budget*
- 4. ILS Strategy** (*David Staley*)
 - *Budgeting, ILS splits, ILS Listing Optimizations, etc.*
- 5. Marketing Tips & Tricks** (*RayAnn Ortiz*)
 - *Creative, Targeting, and other pro-tips etc.*
- 6. Vetting & Working with your Vendors** (*Nicole Staley*)
- 7. Attribution** (*David Lerchbacher*)
- 8. Metrics that Matter** (*Jenny Haacker*)

What Now?! ... The Masks

WHAT NOW?! A COMIC STRIP FROM DIGIBLE



12:30pm MST

AdFraud Presentation and Q&A

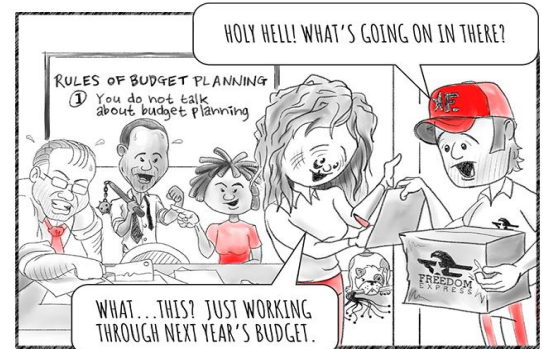


Manny Puentes
CEO & Founder, Rebel AI



What Now?! ... The Budget Meetings

WHAT NOW?! A COMIC STRIP FROM DIGIBLE



1:20pm MST

Perspectives on Marketing

Joya Pavesi, SVP of
Marketing and Strategy
for RKW Residential



Chasten Fulbright,
Principal at Blanton
Turner



Darren Williams, President
at Portico Property
Management



2:30pm MST
Closing Remarks



See ya!



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