

THE STATE OF THE REAL ESTATE & MORTGAGE INDUSTRY

UNDERSTANDING SUCCESS FACTORS
FOR LOAN OFFICERS & REAL ESTATE AGENTS

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Research Objectives

Deliver a thought leadership study centered on the mortgage industry, specifically to:

- Understand factors that drive success for Loan Officers and Real Estate Agents, including how they acquire customers, use digital tools and manage industry relationships;
- Assess Loan Officers' perceptions on the future of the industry and their own careers



Key Finding Themes

All research findings were analyzed to highlight macro trends as well as generational differences.

1



Real Estate
Agents acquisition
and operations

2



Loan Officers
acquisition and
operations

3



Loan Officers
current satisfaction
and future of the
industry

The Most Utilized Resources by Real Estate Agents

Agents are most excited about home listing apps/websites and Top Producers are the most likely to leverage these:

KEY TAKEAWAY #1

 **Zillow**[®]

realtor.com[®]

trulia

KEY TAKEAWAY #2

75% of Real Estate Agents agree that, “the most successful agents have a strong presence on social media.”

Zillow is a registered trademark of Zillow Group, Inc.

Realtor.com is a registered trademark of the NATIONAL ASSOCIATION OF REALTORS[®]

Trulia is operated by Trulia, LLC. Trulia LLC is part of Zillow Group, Inc.

The Most Utilized Resources by Loan Officers

- LOs agree that referrals are still the best method to generate business, but Top Producers are relying more heavily on online methods.
- Top Producers who pay to advertise online are using Zillow most often but also leverage others for paid advertisements:



KEY TAKEAWAY

75% of Top Producers place ads on Zillow, which has the best ROI of 40%.

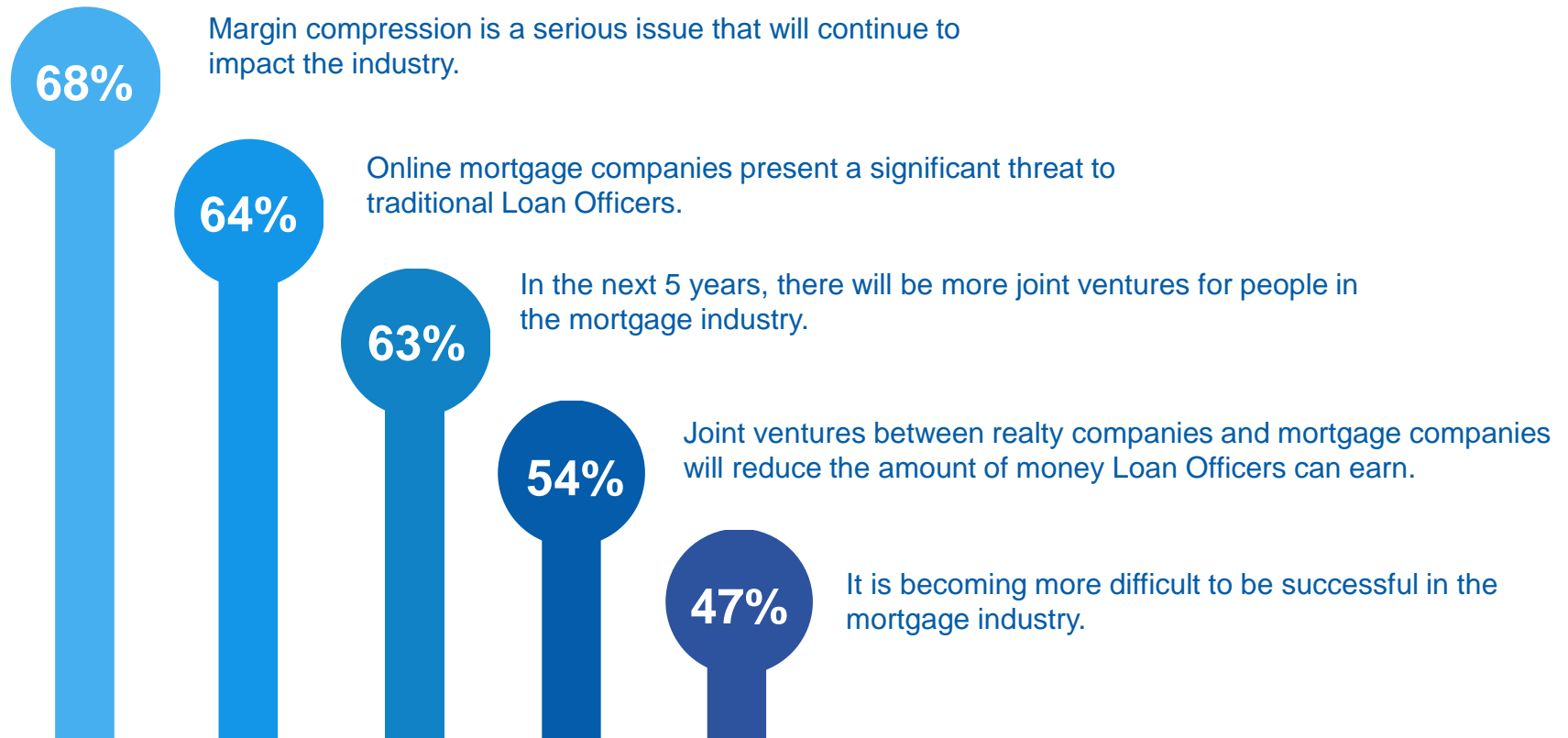
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Loan Officers Current Satisfaction and Future of the Industry

Loan Officers predict more joint ventures in the future, which will compress margins and limit earnings.



The Comprehensive Study Will be Available in Early 2020!

We are excited to share detailed findings to kick off the new year.



Infographics



Social Content



Micro Topic Presentations

And more...



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