

BESPOKE SURVEYS

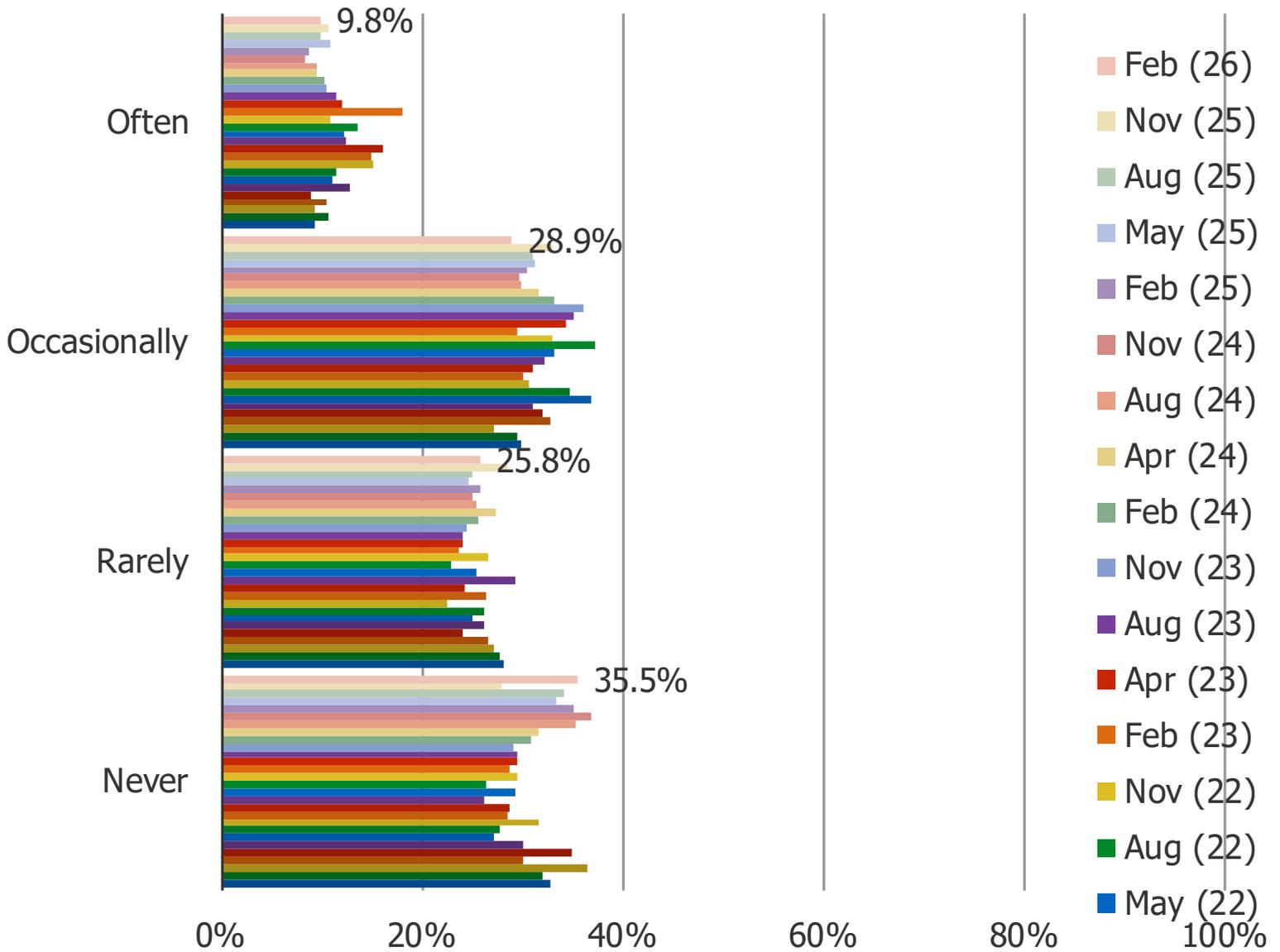
Online Real Estate Apps, Volume 29

1000+ Respondents Per Quarter

ONLINE REAL ESTATE PLATFORM USAGE AND SENTIMENT

HOW OFTEN DO YOU BROWSE REAL ESTATE WEBSITES/MOBILE APPS?

Posed to all respondents



WHEN YOU THINK OF ONLINE REAL ESTATE WEBSITES OR MOBILE APPS, WHICH DO YOU THINK OF FIRST?

Posed to respondents who browse real estate website / mobile apps.

Quarter	Zillow	Other / Unclassified	Realtor.com	Re/Max	Redfin	Century 21	Homes.com
2021Q1	40.83%	36.21%	11.42%	2.19%	1.22%	3.04%	0.85%
2021Q2	38.19%	37.35%	11.20%	4.10%	2.17%	3.13%	0.24%
2021Q3	36.60%	38.61%	11.33%	3.90%	1.53%	3.19%	0.47%
2021Q4	39.22%	34.68%	12.62%	3.80%	2.08%	3.19%	0.49%
2022Q1	43.06%	31.24%	12.30%	2.90%	2.29%	1.81%	1.09%
2022Q2	36.85%	37.09%	13.33%	2.67%	2.55%	3.03%	0.24%
2022Q3	42.36%	32.61%	11.64%	4.08%	2.18%	2.91%	0.44%
2022Q4	34.99%	38.91%	11.16%	3.32%	2.41%	3.32%	1.21%
2023Q1	34.51%	40.37%	11.71%	3.39%	2.62%	2.47%	0.46%
2023Q2	38.38%	37.31%	10.24%	3.82%	2.91%	3.36%	0.61%
2023Q3	50.13%	24.40%	12.40%	2.00%	4.00%	1.07%	1.07%
2023Q4	42.98%	32.13%	10.71%	3.04%	3.47%	2.46%	0.87%
2024Q1	39.57%	34.49%	10.87%	3.48%	3.48%	2.46%	2.17%
2024Q2	40.75%	33.52%	11.27%	2.36%	3.76%	3.20%	1.25%
2024Q3	42.06%	36.03%	9.56%	2.35%	2.94%	2.35%	2.06%
2024Q4	42.52%	33.43%	9.53%	2.79%	2.35%	1.61%	3.08%
2025Q1	39.45%	34.29%	8.65%	3.49%	3.49%	2.12%	4.86%
2025Q2	43.12%	36.79%	8.50%	1.08%	3.09%	1.85%	3.40%
2025Q3	44.94%	32.36%	8.90%	2.15%	3.83%	1.07%	3.83%
2025Q4	46.46%	27.58%	11.65%	1.77%	4.57%	1.62%	3.83%
2026Q1	45.20%	30.80%	10.22%	2.32%	3.56%	1.39%	4.18%
---	---	---	---	---	---	---	---
R-Squared	0.268	0.171	0.419	0.321	0.658	0.468	0.747
P-Value	0.016	0.062	0.002	0.007	<0.001	0.001	<0.001
Trend	UP	Down	DOWN	DOWN	UP	DOWN	UP

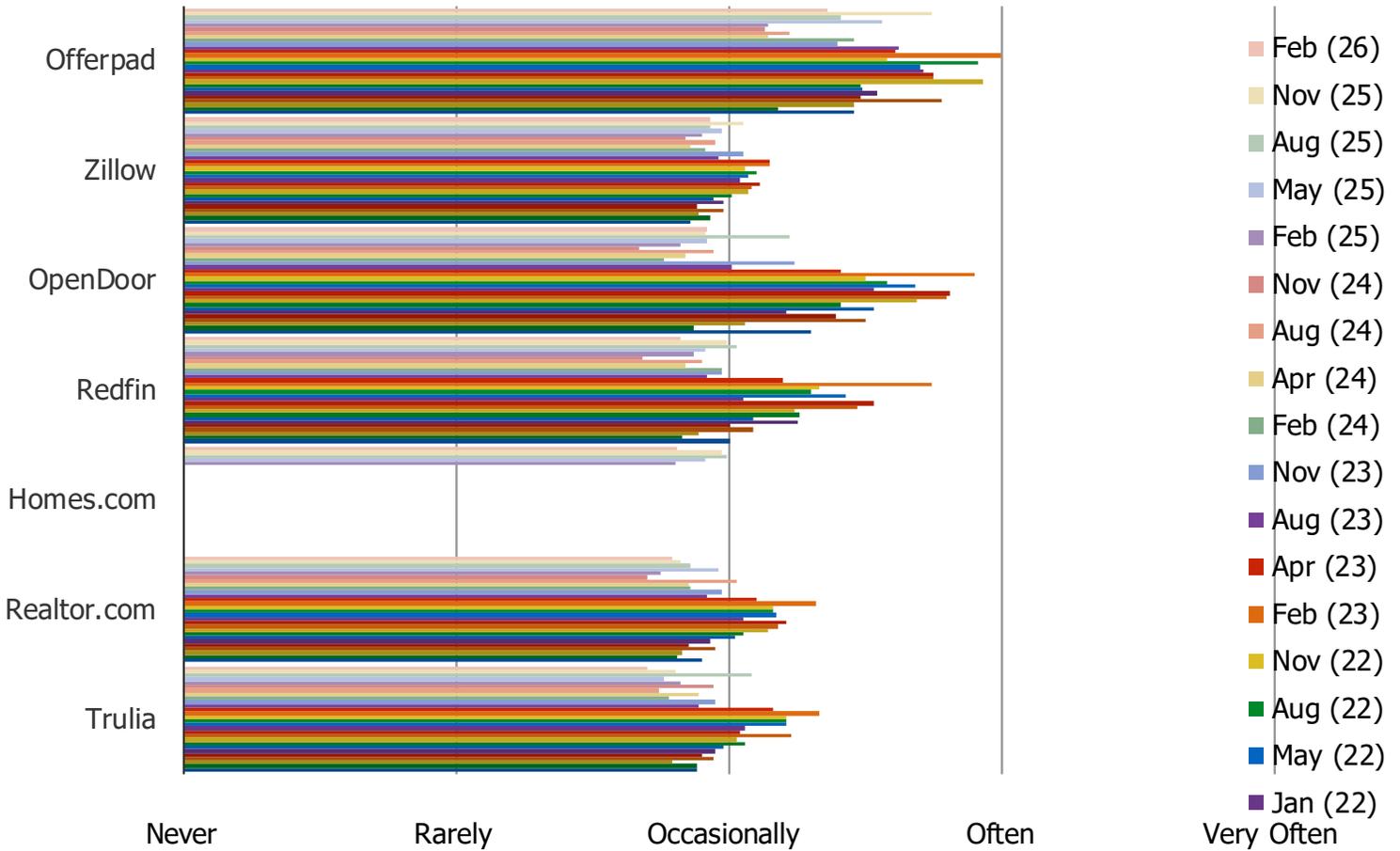
Key Takeaways

- **Zillow is Dominant and Growing:** Zillow is by far the most top-of-mind brand (41% lifetime average). Furthermore, its mindshare is trending significantly **UP** ($p = 0.016$), reaching 45.2% in Q1 2026.
- **The "Homes.com" Surge:** The most statistically significant growth in the entire dataset belongs to Homes.com ($p < 0.001$, $R^2 = 0.747$). While it started near 0% in 2021/2022, it has steadily climbed, breaking 4% top-of-mind awareness in late 2025/early 2026.
- **Redfin is Gaining Ground:** Redfin is also seeing a highly significant upward trend ($p < 0.001$), rising from ~1-2% mindshare in 2021 to 3.5%-4.5% in the most recent quarters.
- **The Legacy Brands are Fading:** Traditional brokerages and older portals are mathematically losing top-of-mind awareness. Realtor.com, Re/Max, Century 21, and Trulia are all trending significantly **DOWN**.

*Data on this page analyzed via LLM.

HOW OFTEN DO YOU VISIT EACH OF THE FOLLOWING?

Posed to respondents who have visited each of the following.

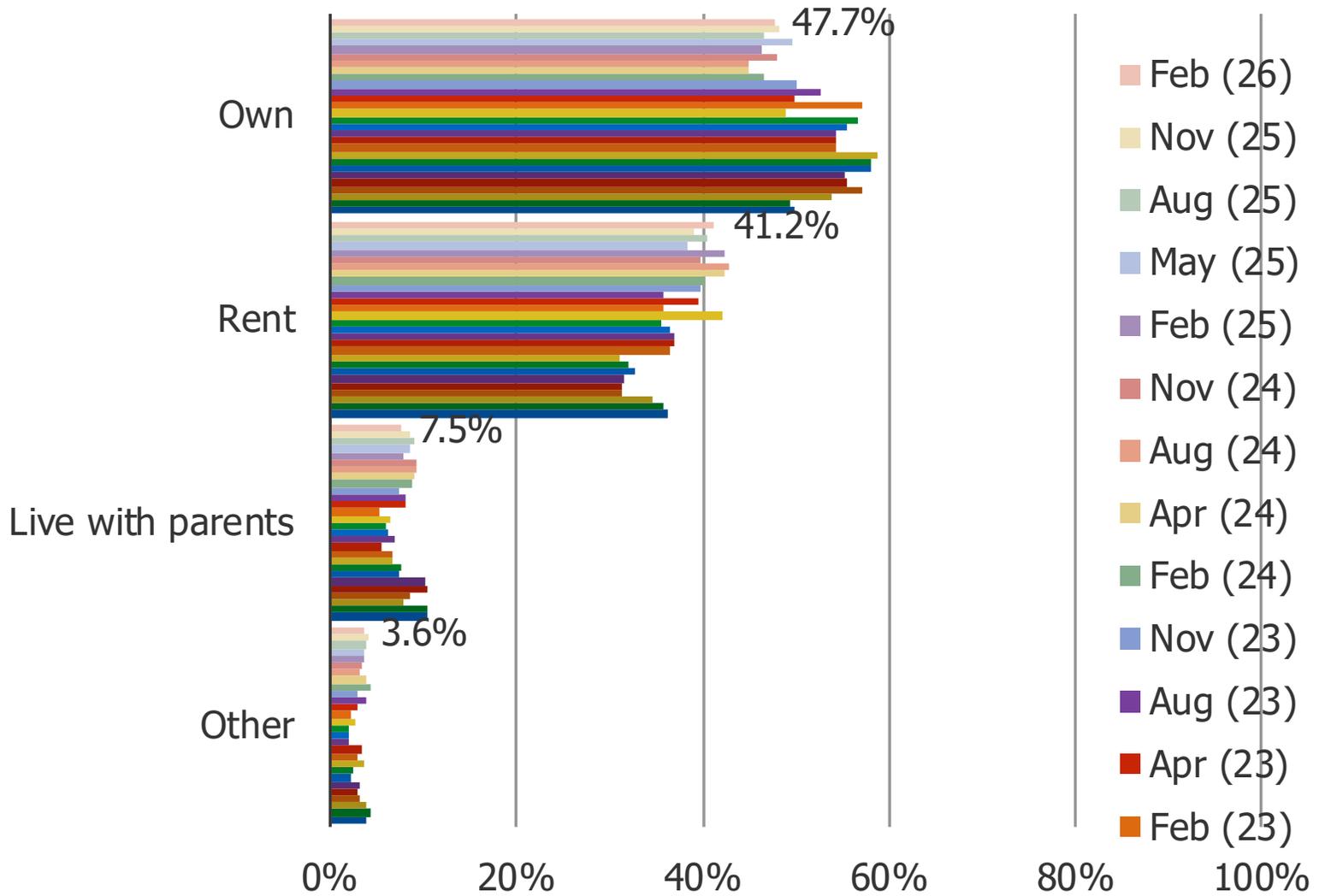


	N=
Zillow	531
Redfin	186
Realtor.com	319
OpenDoor	96
Offerpad	44
Trulia	162
Homes.com	241

SECTOR TRENDS

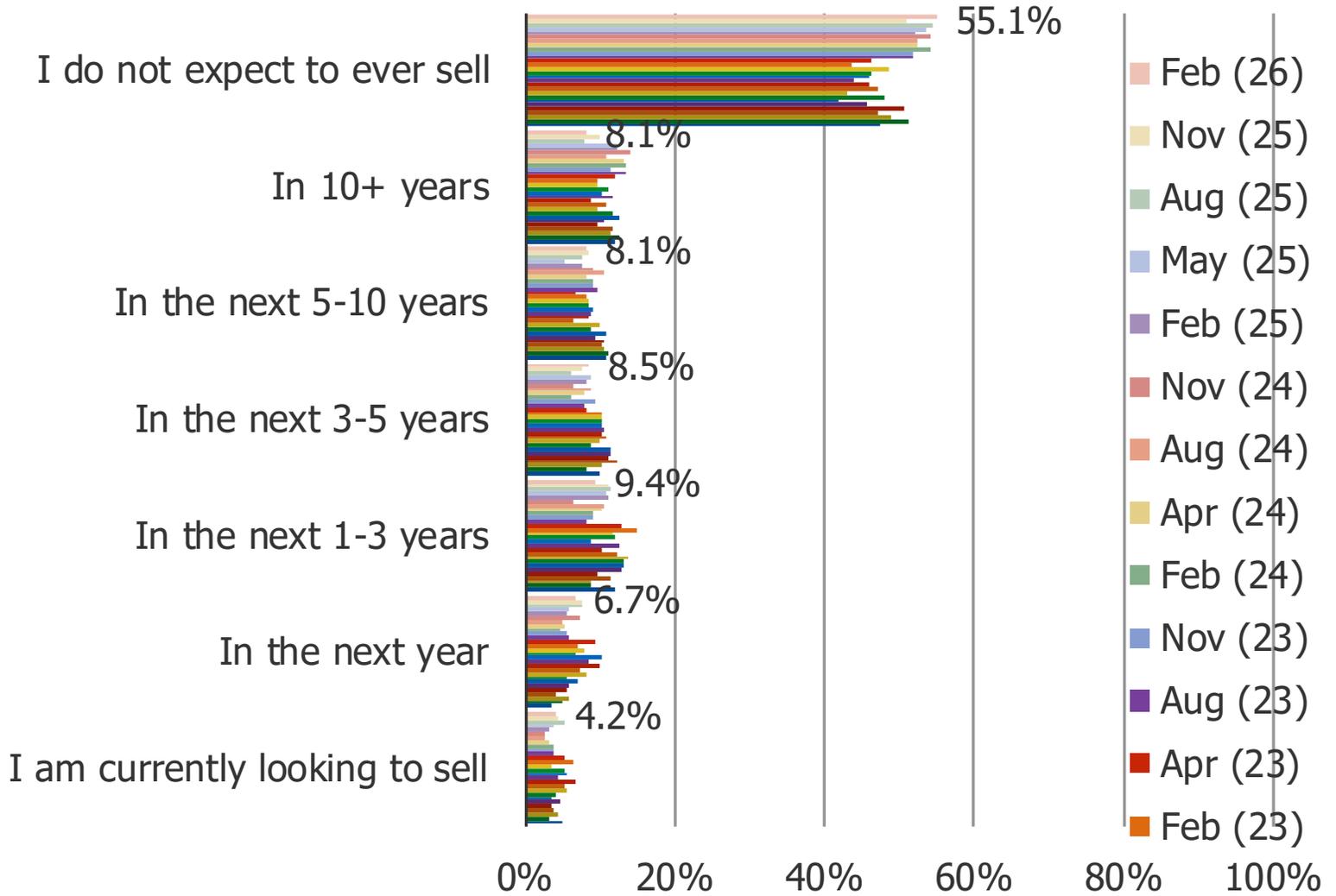
WHICH OF THE FOLLOWING BEST DESCRIBES YOUR CURRENT LIVING SITUATION?

Posed to all respondents



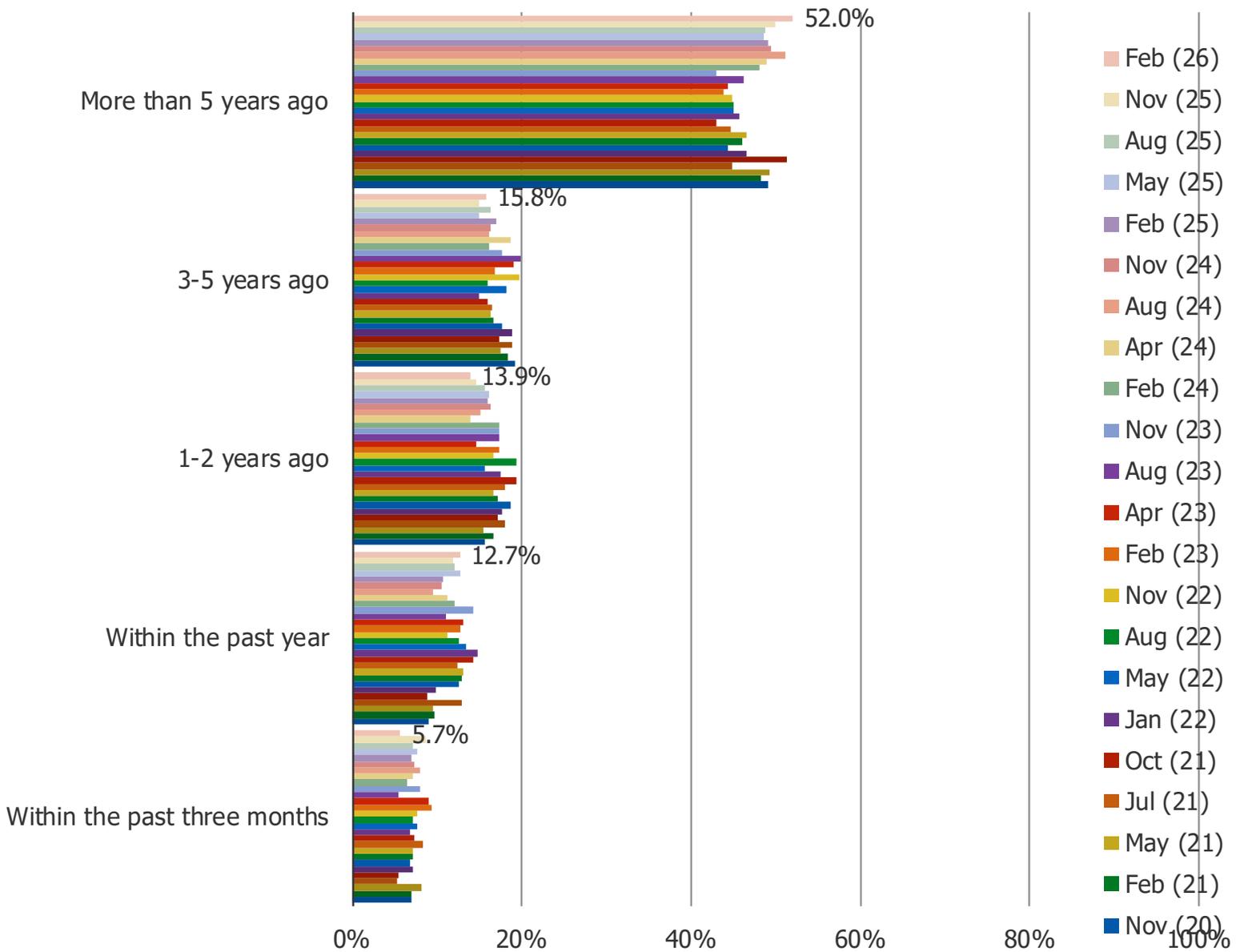
DO YOU EXPECT TO SELL YOUR HOME AT ANY POINT IN THE FUTURE?

Posed to home owners



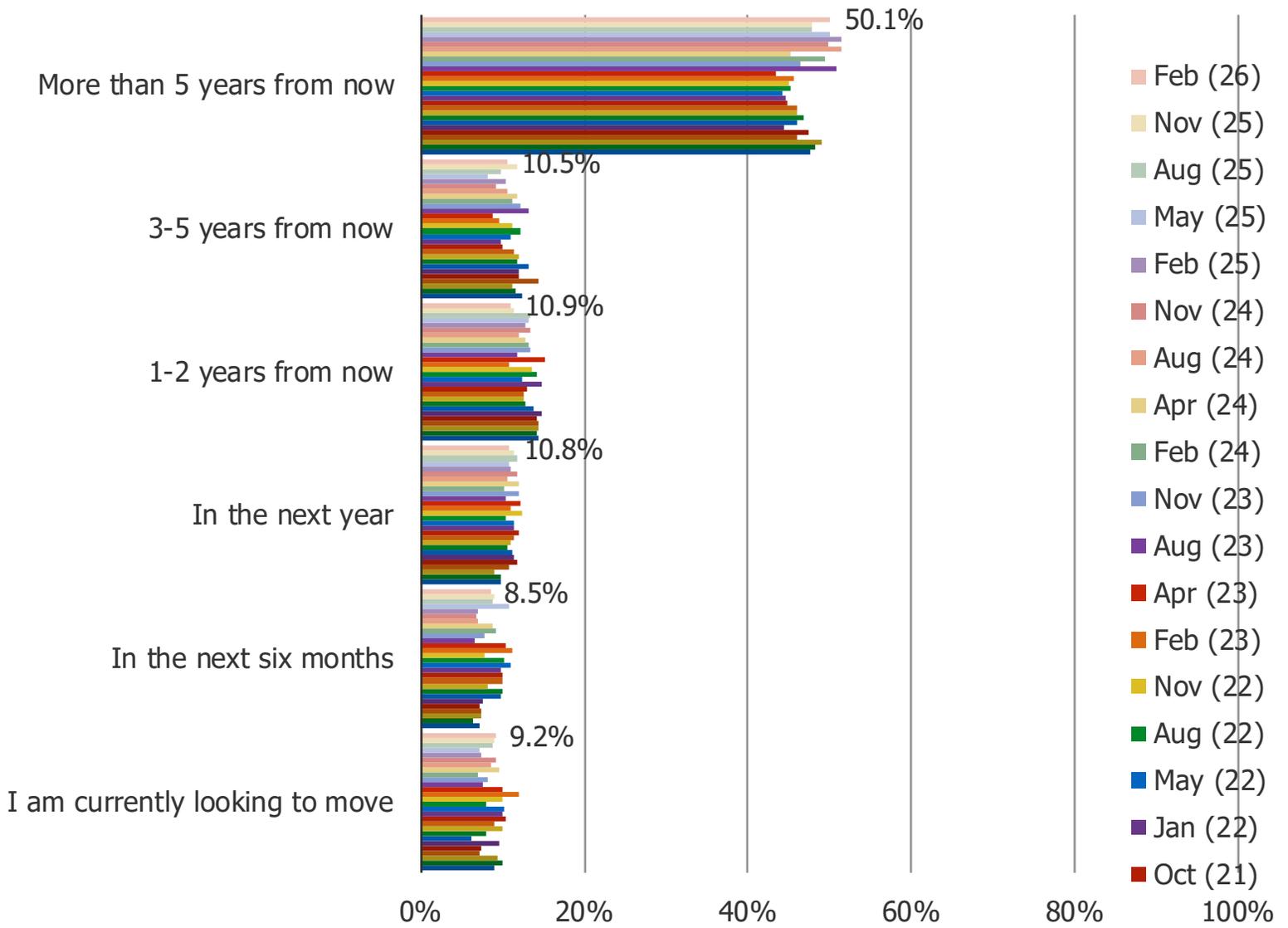
WHEN IS THE LAST TIME YOU MOVED?

Posed to all respondents



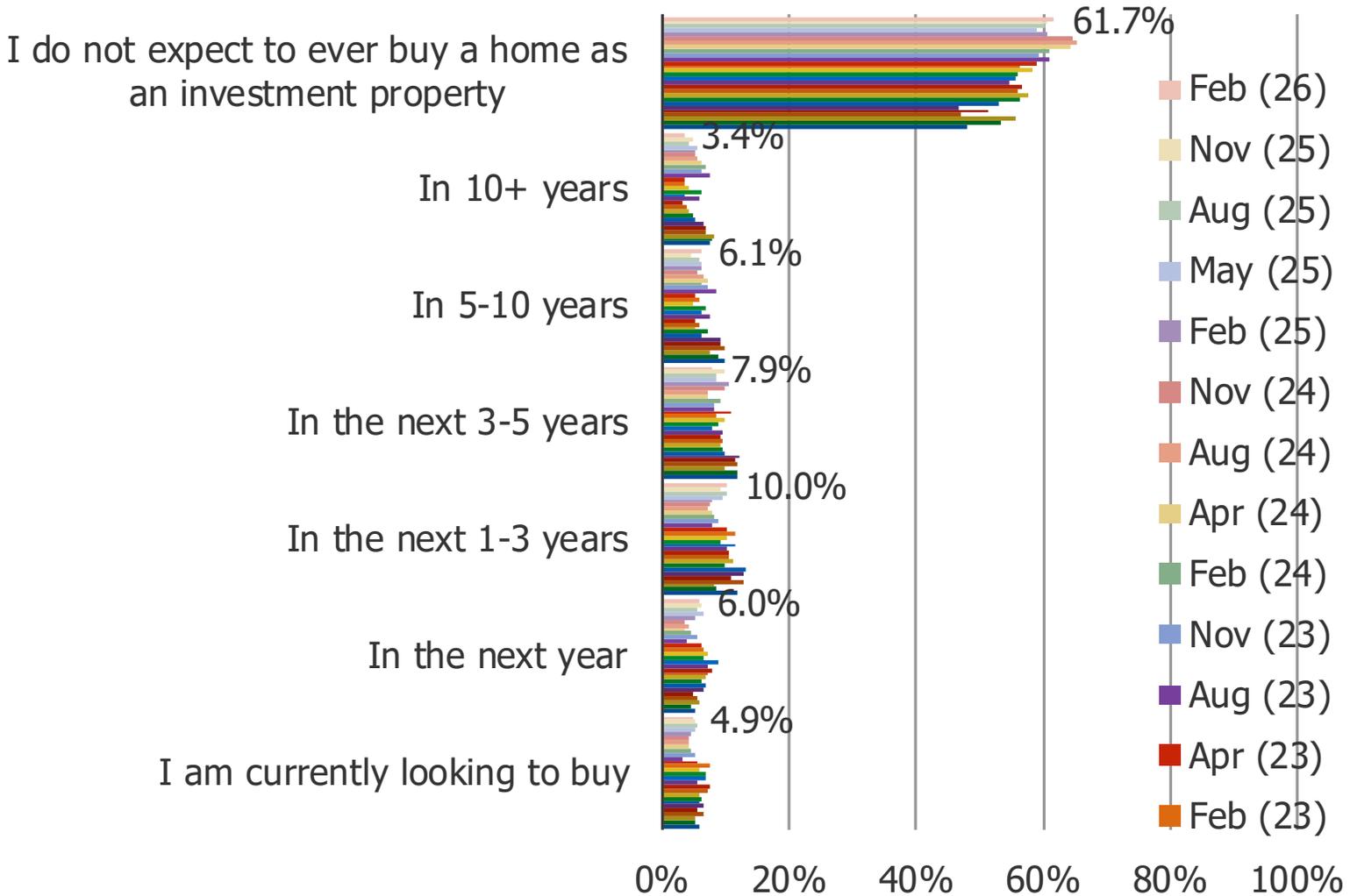
WHEN DO YOU EXPECT TO MOVE AGAIN?

Posed to all respondents



DO YOU EXPECT TO BUY AN INVESTMENT PROPERTY AT ANY POINT IN THE FUTURE?

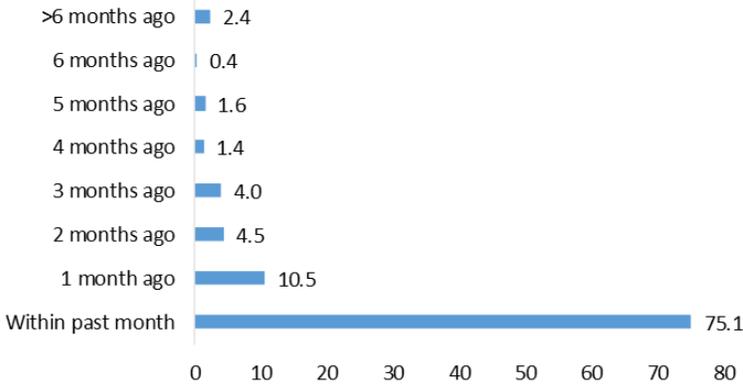
Posed to all respondents



MONTHLY DATA

MORTGAGE DELINQUENCIES

Last Mortgage Payment (% Homeowners)



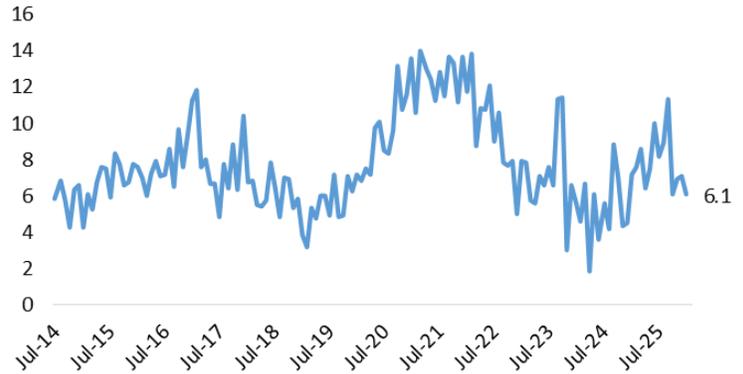
Last Time Refinanced Mortgage (% Homeowners)



Last Mortgage Payment (% Homeowners)

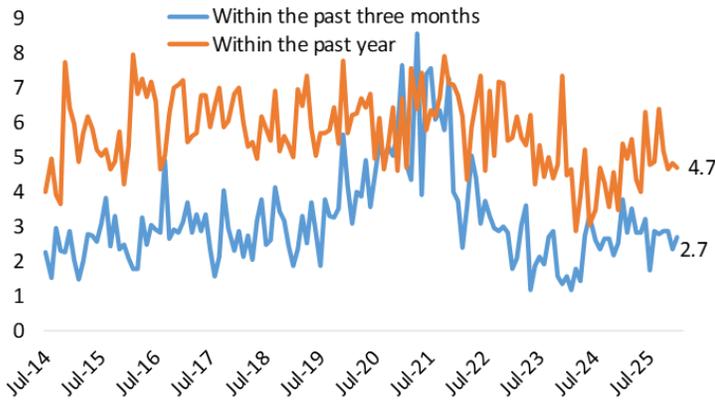


Last Time Refinanced Mortgage: Within past year (% Homeowners)

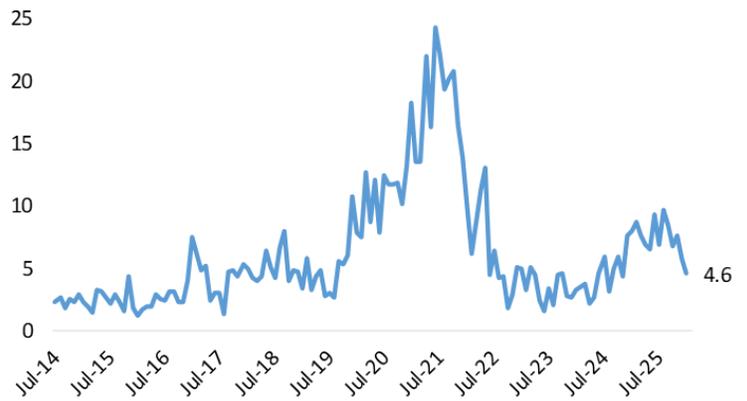


RECENT HOME PURCHASES

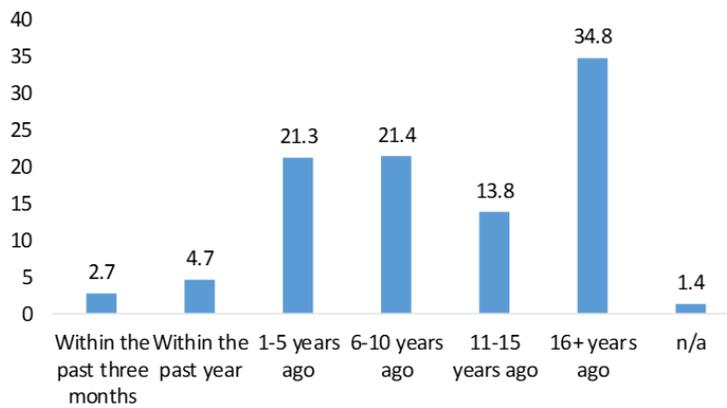
Date of Home Purchase (% Homeowners)



Home Listed For Sale (% Homeowners)

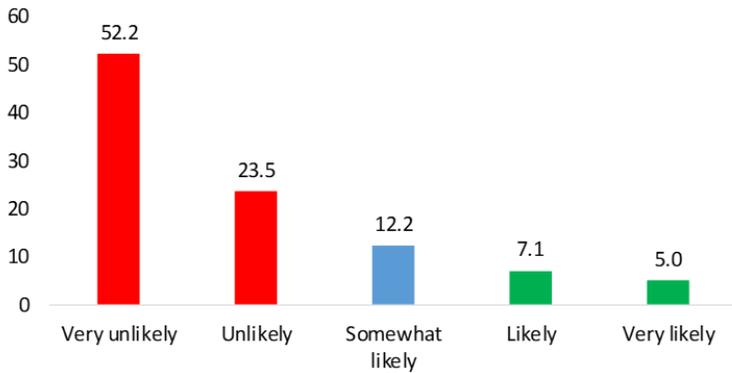


Date of Home Purchase (% Homeowners)

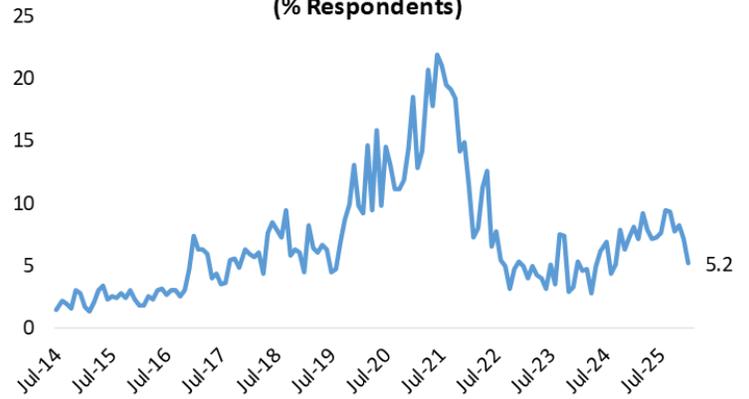


FUTURE HOME PURCHASES

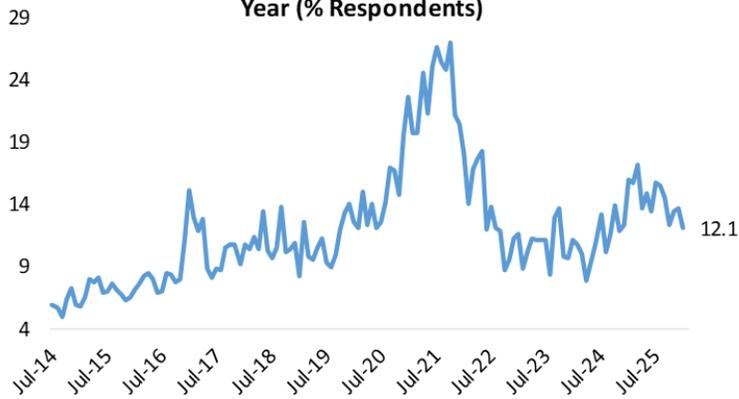
**Likelihood of Home Purchase In The Next Year
 (% Respondents)**



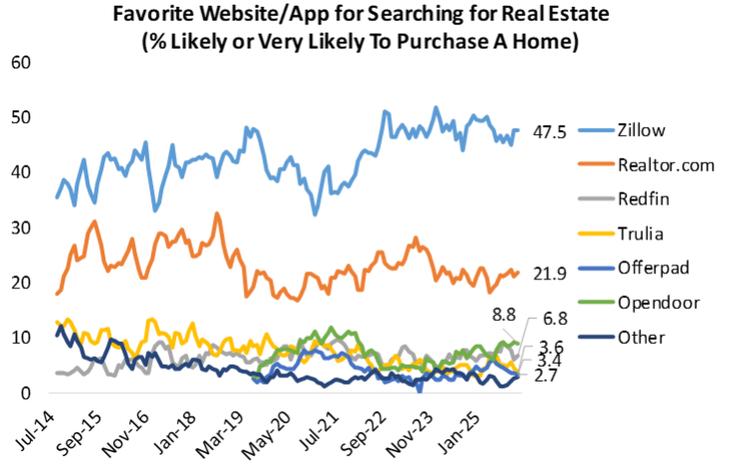
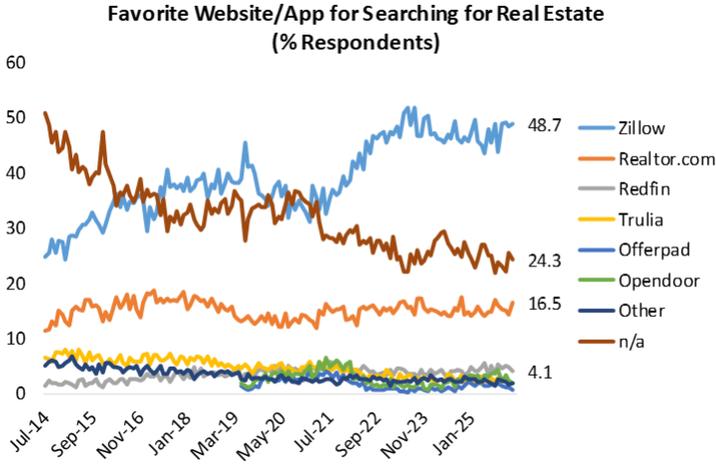
**Applied For Building Permit In Past Month
 (% Respondents)**



**Likely or Very Likely To Purchase A Home In The Next
 Year (% Respondents)**

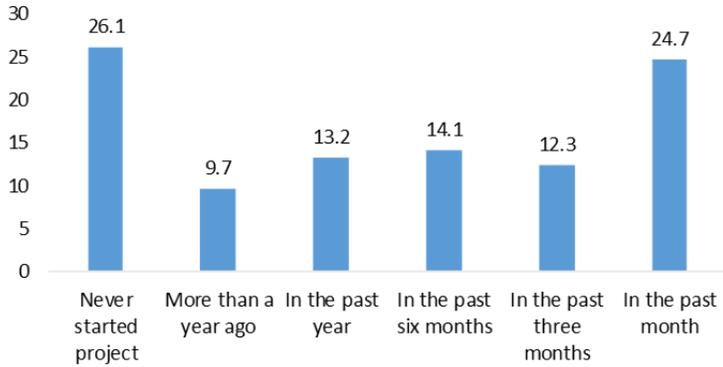


FAVORITE REAL ESTATE APP



HOME IMPROVEMENT PROJECTS

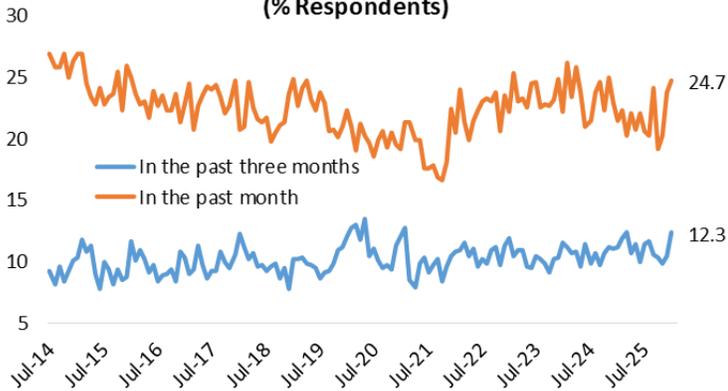
Last Time Starting A Home Improvement Project (% Respondents)



DIY vs Hired Help (% of Respondents Who Have Done Home Improvement Project)



Last Time Starting A Home Improvement Project (% Respondents)



Plans To Start A Home Improvement Project In Next Six Months (% Respondents)

