

USING CONSUMER INSIGHTS TO BUILD A BRAND RENTERS LOVE

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BRAND ASPIRATION:

**TO BUILD
THE MOST BELOVED
& WIDELY USED
BRAND
IN ALL THINGS HOME**

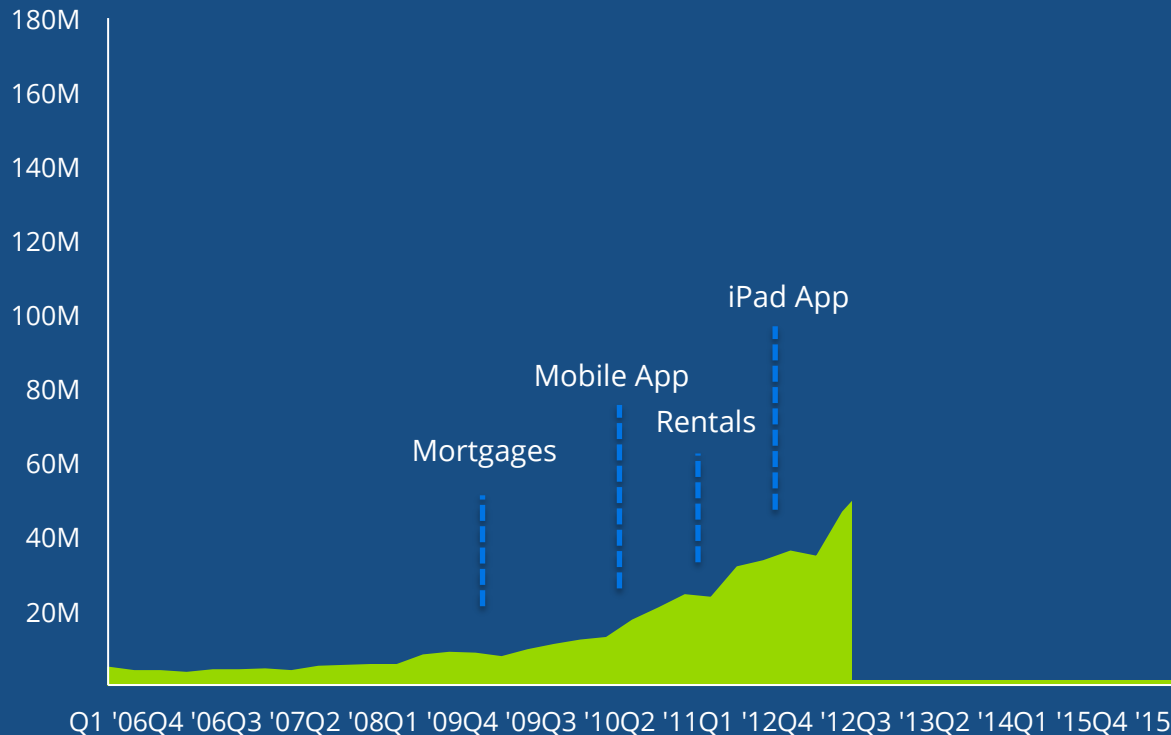


A man and a woman are standing in a modern kitchen, looking at each other. The woman is on the left, wearing a light-colored sweater and jeans. The man is on the right, wearing a grey sweater and jeans. They are both smiling. The kitchen has dark wood cabinets, a white countertop, and a stainless steel sink. A blue semi-transparent banner is overlaid on the image, containing the text.

To build a beloved brand,
you have to know your customer

NEW OPPORTUNITIES AND INCREDIBLE GROWTH

**MONTHLY
UNIQUE USERS**
Quarterly average



Source: Google Analytics and Omniture

IDENTIFYING THE PROBLEM



Exposure



Awareness



Understanding



Consideration



Trial



Use



Adoption



Some people had never heard of Zillow

Others only thought to use Zillow later in the home shopping process

People who used Zillow loved it ✓



We knew we wanted to advertise.

We didn't know what we wanted to say.

INSIGHT MINING – THE ORIGINAL

3 cities

- What's their process?

6 focus groups

- What resources do they use?

20 1:1 interviews

- Hopes, dreams, fears

50 people

- Pain points + delights

WHAT WE LEARNED

Consumers have different **emotional & rational needs** when shopping for a home



SHOPPING

- Imagine the Possibilities
- Picture myself here
- Be in control (my way)
- Avoid Big Mistakes
- Feel empowered (confidence)

BUYING

- Make Good/Smart Decisions
- Unbiased, Independent
- Informed, prepared
- Easy (makes the overwhelming manageable & easy)

WHAT WE LEARNED

Consumers have different **emotional & rational needs** when shopping for a home



SHOPPING

- Imagine the Possibilities
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BUYING

The creative challenge:

**Stay true to the Zillow core,
but increase our relevance
earlier in the process**

"FIND YOUR WAY HOME" CAMPAIGN





WIDESPREAD IMPLICATIONS

- Visually driven search experience
- Tools to keep up with a constantly changing market
- Home buyers and home renters are similar in many ways...

...but VERY different in others

RESULTS

MONTHLY
UNIQUE USERS
Quarterly average



Source: Google Analytics and Omniture

TODAY CONSUMER INSIGHTS ARE CORE TO THE ZG CULTURE

50K+ people consulted
directly every year

150K+ site survey
respondents
every year

Qualitative & quantitative

Product & marketing

All brands & business units

Guides all decision-making

RACHEL, OUR RENTER PERSONA



Female



35 yrs. old



\$52k/yr.



Single

"I need to find the right information right away so I can act quickly."



FINDING A PLACE IS HARD WORK & STRESSFUL...



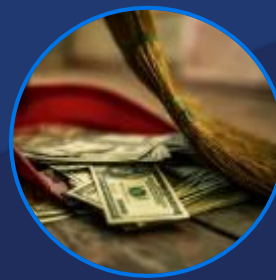
In the middle
of a **big life
change**



Competing
against other
renters



Restricted by
**lease terms &
timing**



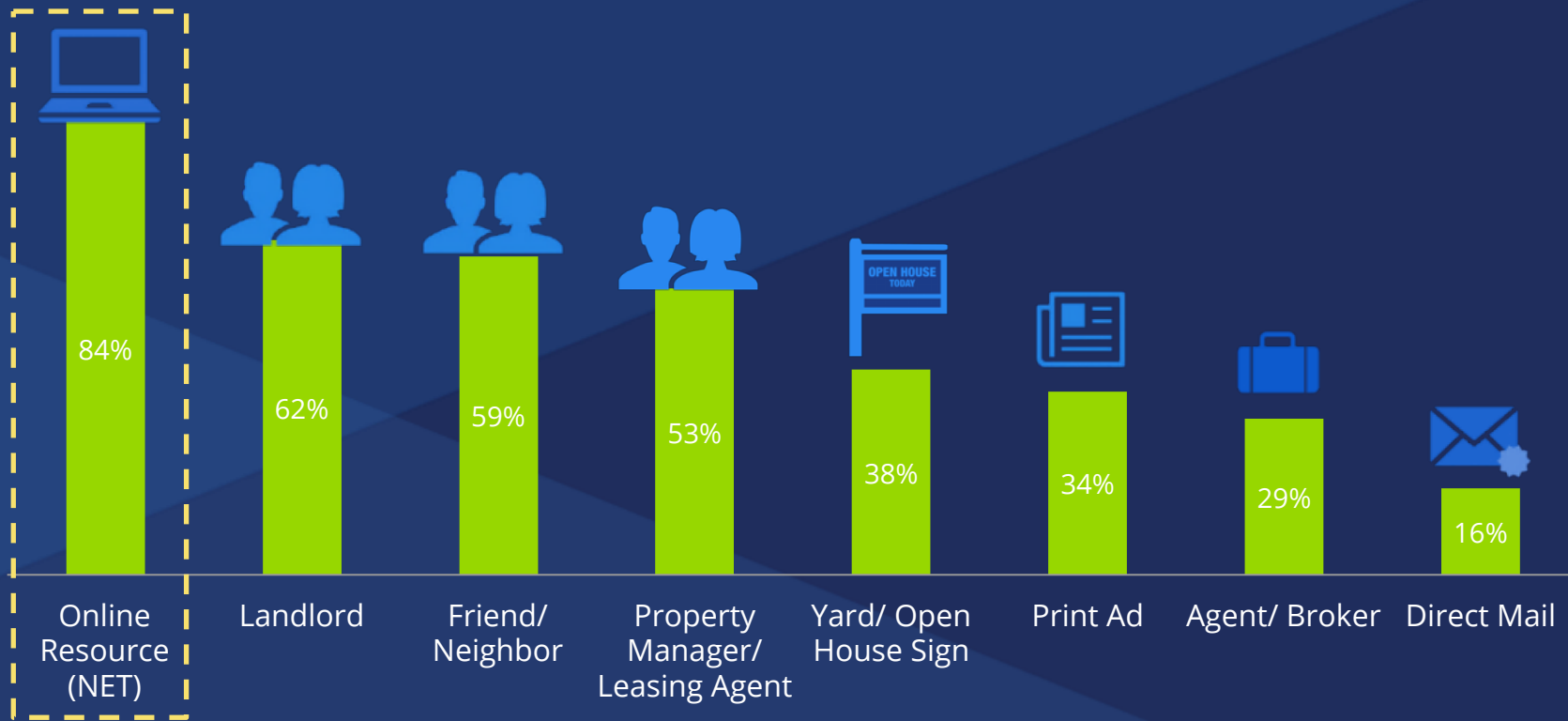
Not making a
long-term
investment



In a deadline to
move (average
4-8 weeks)

All of which leads to "Renters' Brain"

WHEN SEARCHING, ONLINE IS THE TOP RESOURCE



VARIETY OF METHODS USED TO ACCESS ONLINE RESOURCES

How Accessed Online



Desktop/Laptop
74%

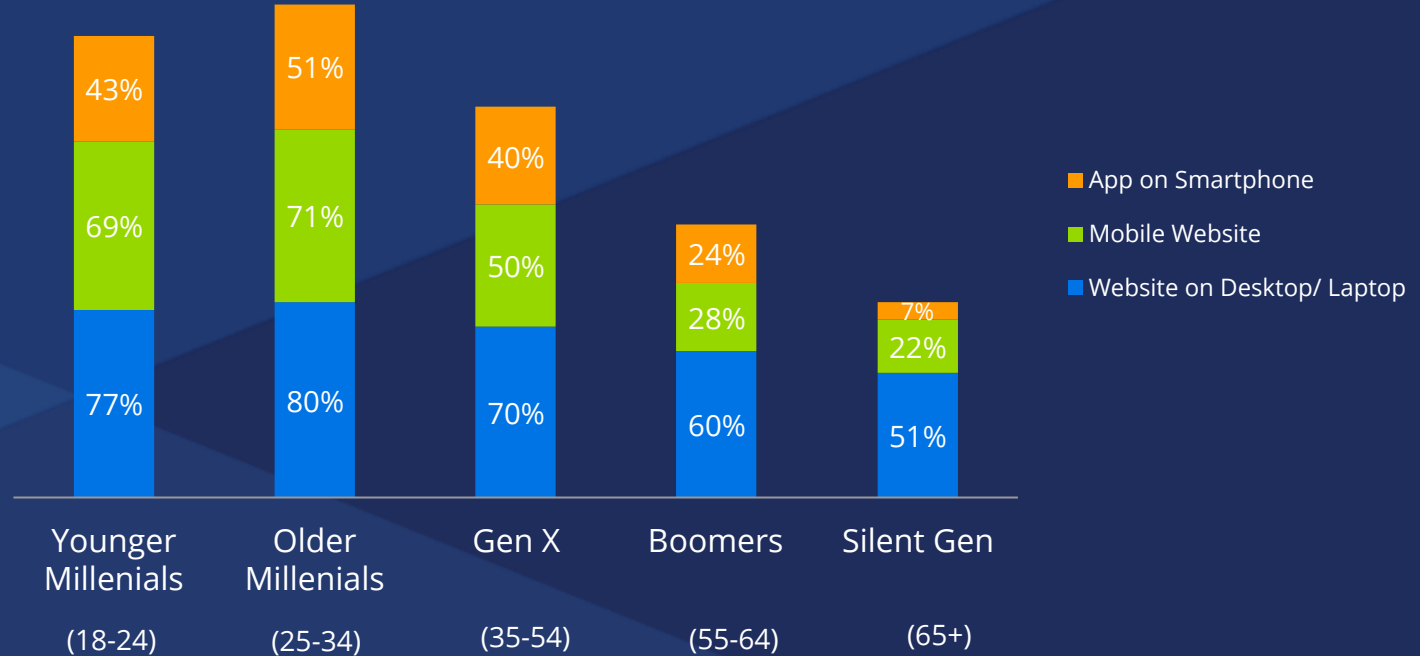


Mobile Web
59%



Smartphone App
43%

METHODS USED TO ACCESS ONLINE RESOURCES VARIES BY AGE



RENTERS CONSIDERED A VARIETY OF PROPERTY TYPES

Profile of Renters by type of property considered



Single Family Home



Small Building (<10)



Medium Building (10-49)



Large Building (50+)

51% Millennials
(18-34)

63% Female

53% Kids

45% Pets

56% Millennials
(18-34)

55% Female

37% Kids

33% Pets

59% Millennials
(18-34)

52% Female

30% Kids

30% Pets

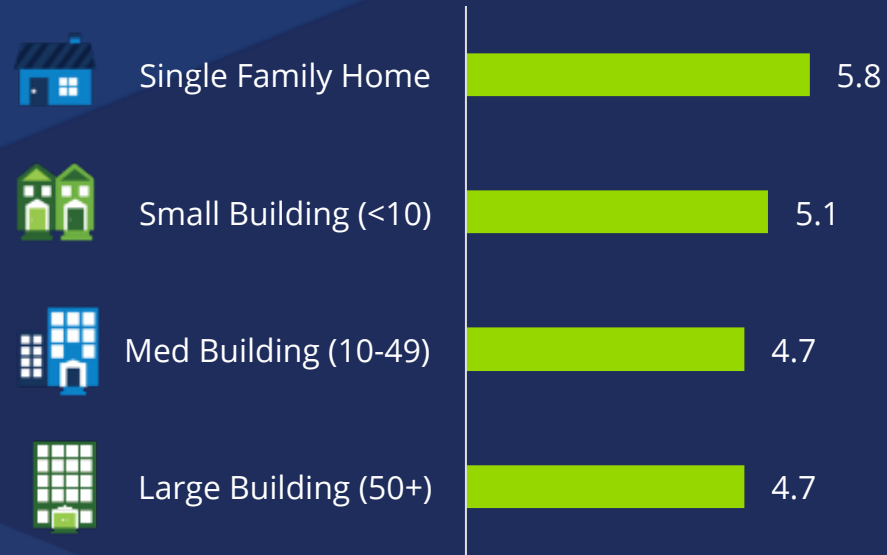
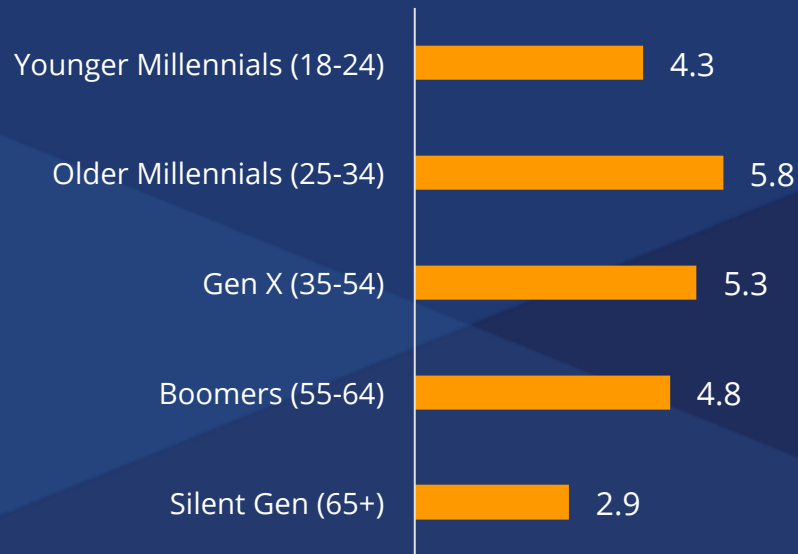
63% Millennials
(18-34)

54% Female

34% Kids

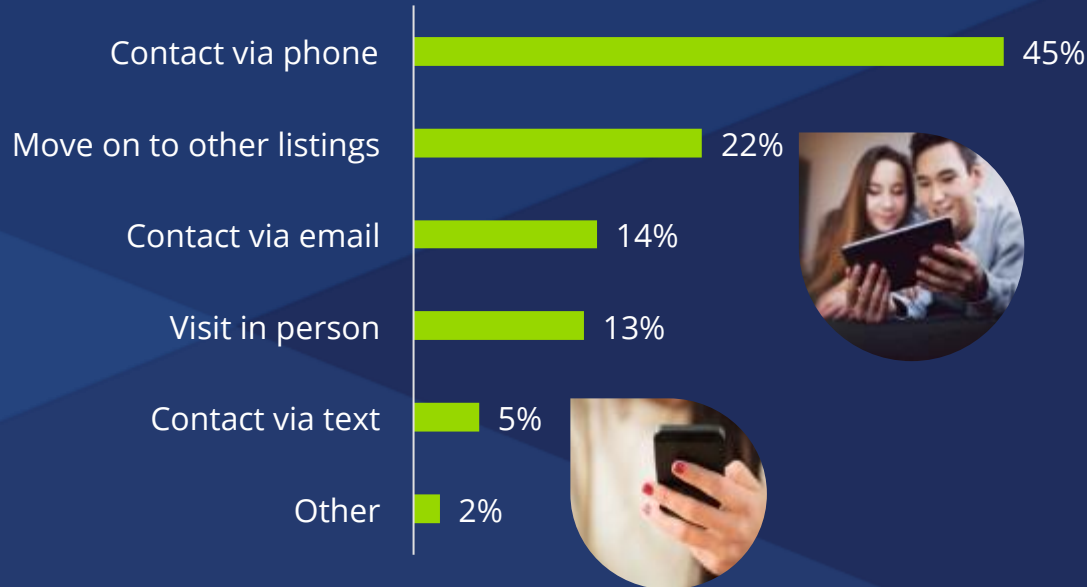
25% Pets

OF THOSE WHO CONTACTED A PROPERTY MANAGER, RENTERS CONTACTED AN AVERAGE OF 5 LISTINGS

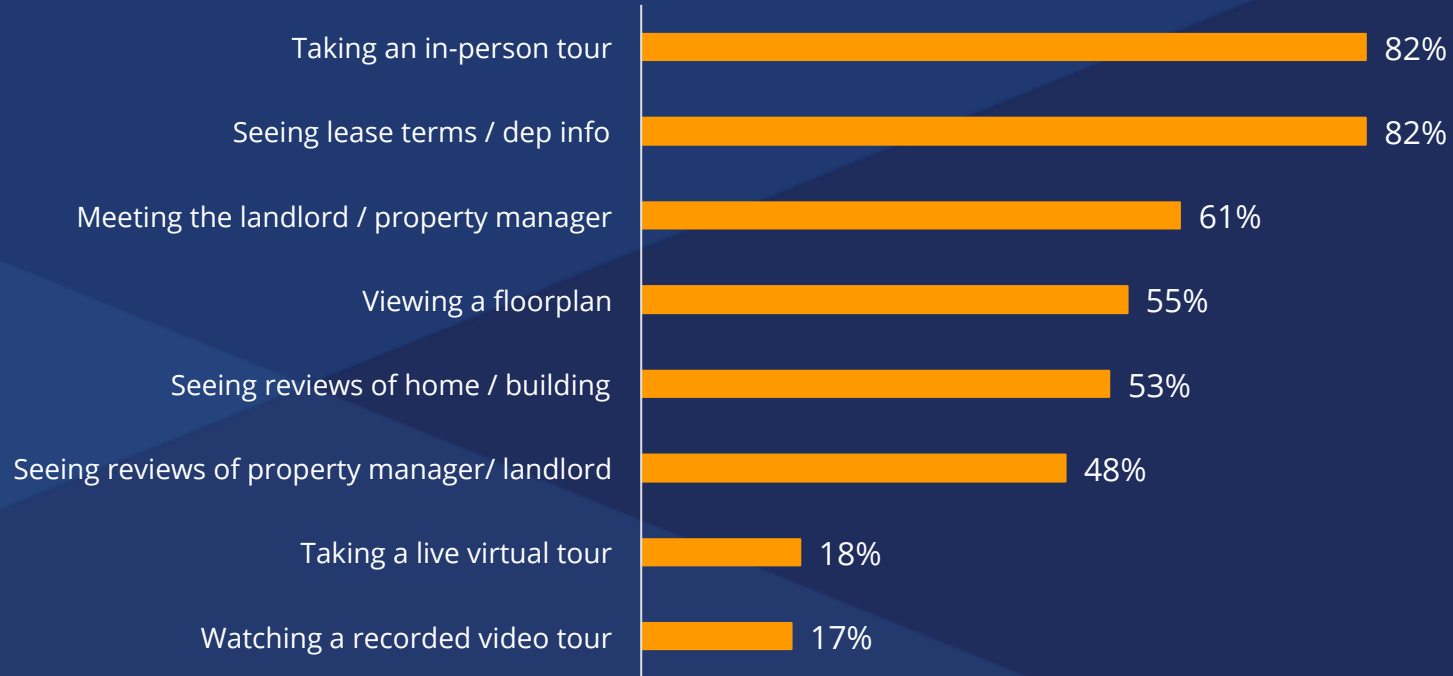


RESPONSE TIME MATTERS

If no response, nearly half will contact via phone. A quarter will just move on.



IN-PERSON TOURS & LEASE TERMS ARE MOST IMPORTANT IN HELPING RENTERS DECIDE IF A PROPERTY IS RIGHT



CIRCUMSTANCE & MINDSET LEAD TO DIFFERENT NEEDS...



Problem solving Rachel

- Alerts
- Mobile
- Listings refresh
- Renter Profile



Might move Rachel

- Photos
- Videos
- Comparison

...AS DOES WHO'S SEARCHING



Solo Searching

- Lonely and more stressful process
- More likely to mistrust
- Default to the most comfortable way of searching; even if it isn't fruitful



Couple Searching

- Shared process and both are searching
- Communication can be hard
- Different priorities can add stress

KEYS TO BUILDING A BELOVED BRAND:

Know your customer. Deeply.

Demonstrate that understanding in your marketing.

Back it up with products that meet their needs and delight.