



UNDERSTANDING OUR MEMBERS

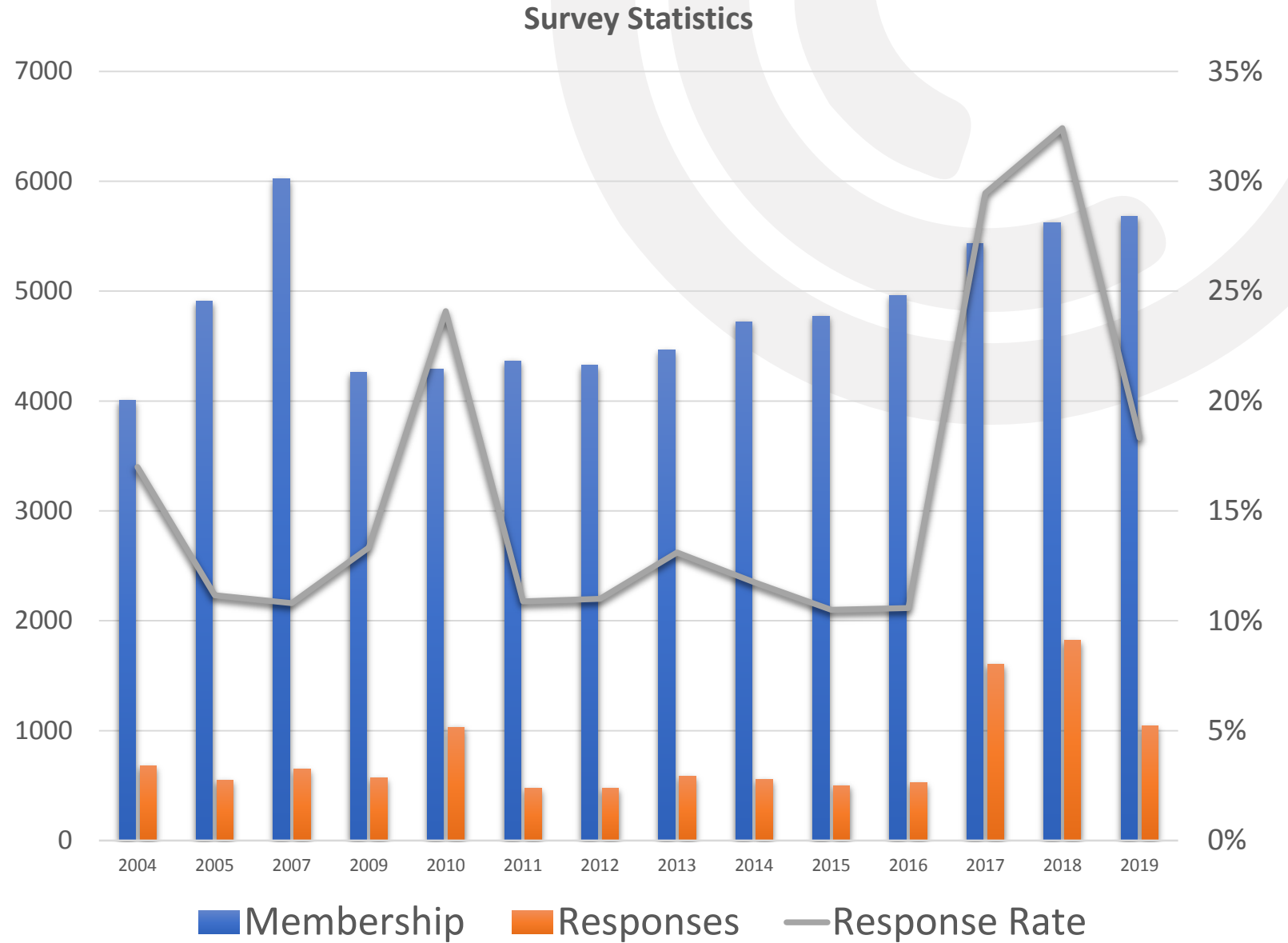
"WHAT MATTERS IS BEING
OBSESSIVELY **DATA-DRIVEN**,
COMBINED WITH THE **CREATIVITY**
AND **DISCIPLINE** TO ACT ON THAT
DATA IN WAYS THAT **MEET YOUR**
MEMBERS NEEDS BETTER THAN
ANY OTHER ORGANIZATION."

JIM COLLINS - *GOOD TO GREAT*

WHY?

- Descriptive
- Predictive
- Prescriptive

15 YEARS OF SURVEYS



RESPOND TO EMERGING TRENDS

Teams increasing

- Team-focused Education/Networking

Commercial/Property Management

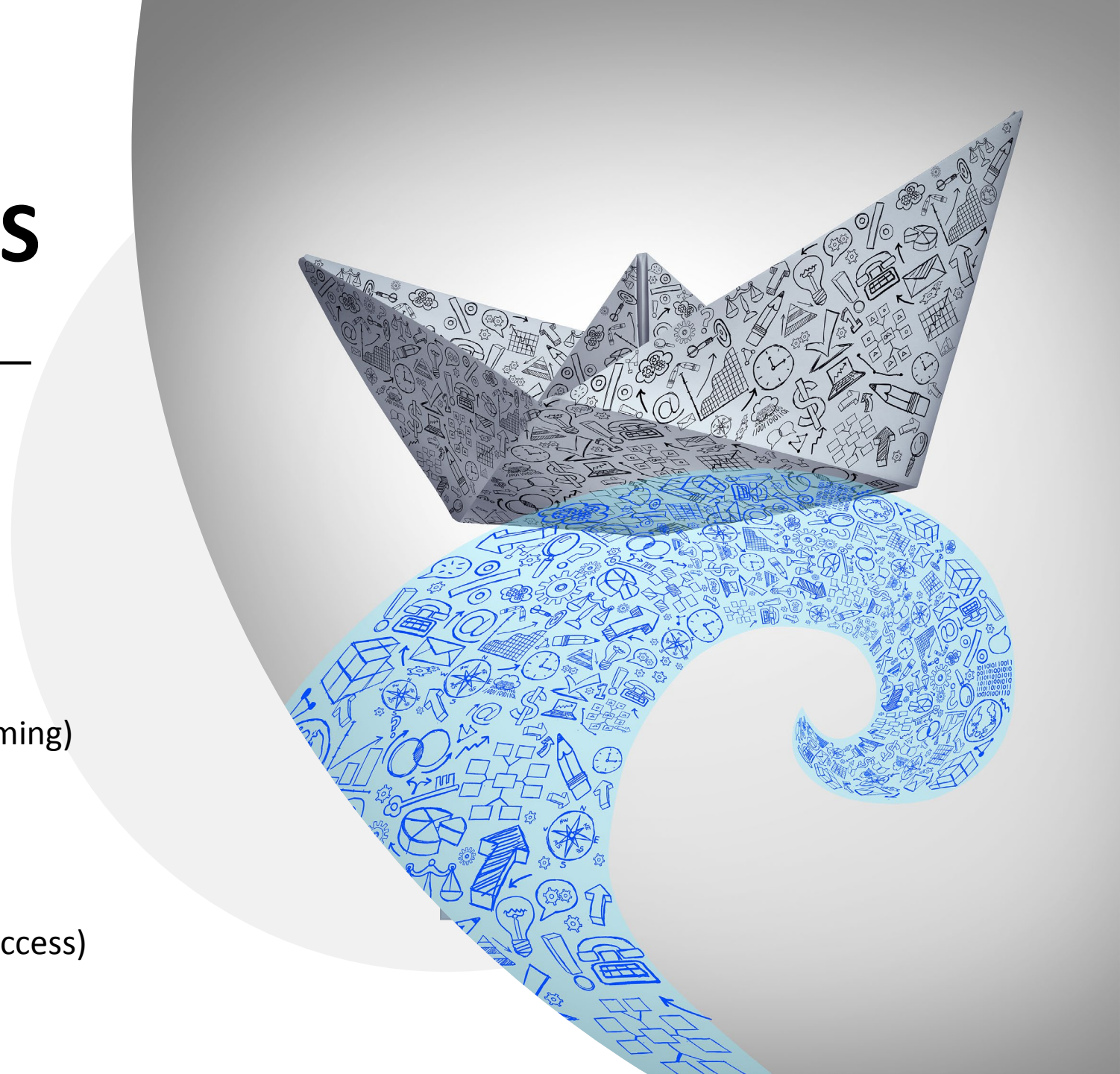
- Merged with NCCAR
- Created Commercial Brokers Association

25+% of members are Out-of-Area

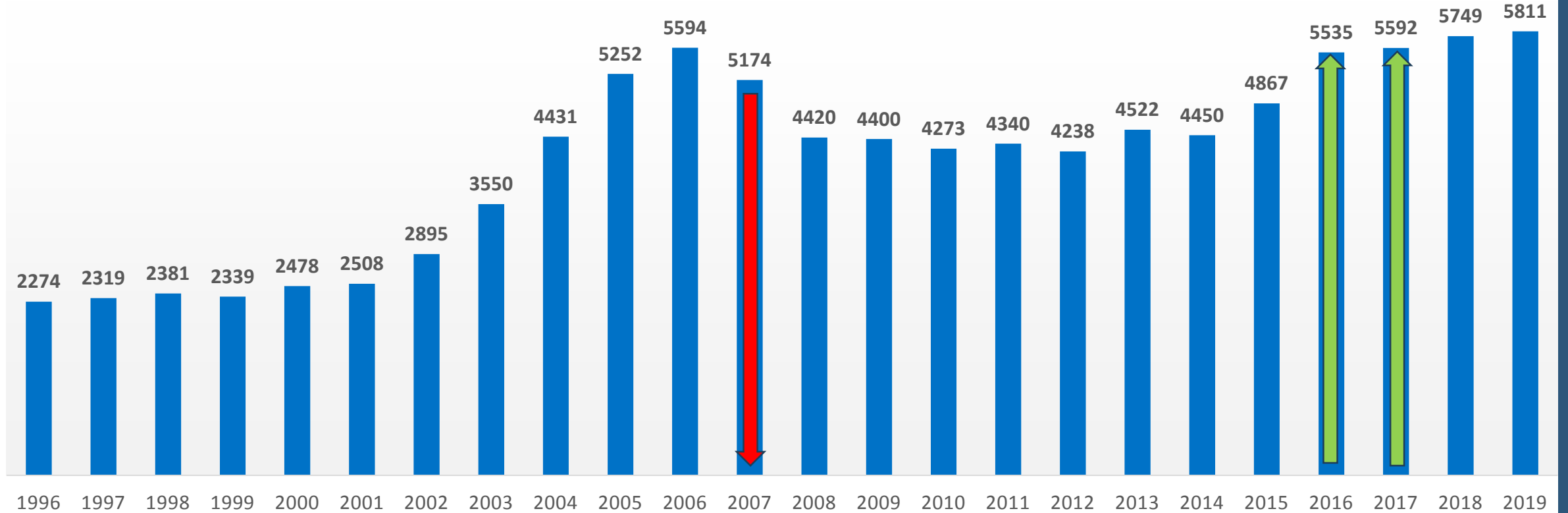
- Distance Learning (Videos, Webinars, streaming)
- Merged with AAOR
- New Service Center

High attrition rate for New Agents

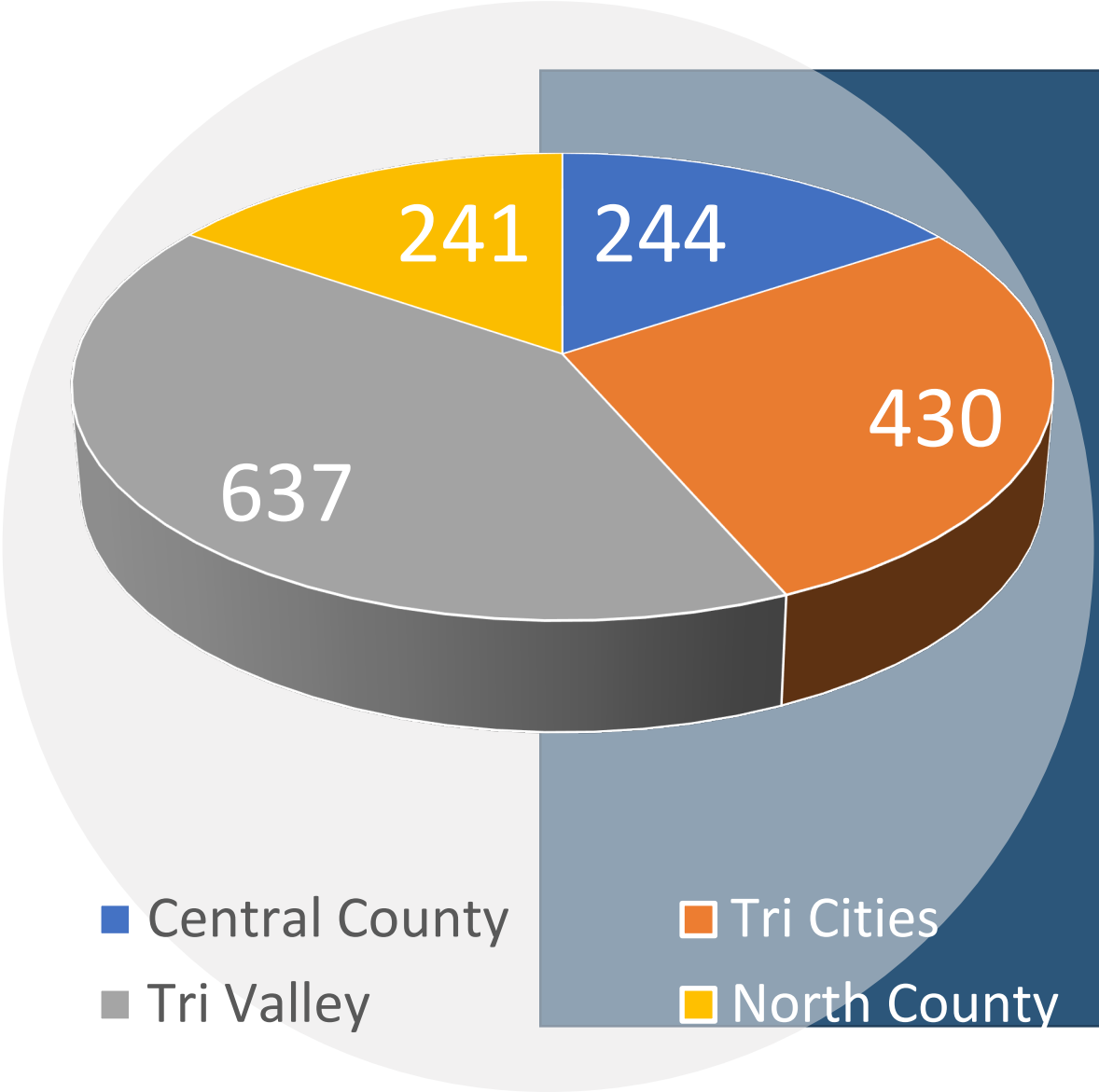
- REALTOR® Success Program (Roadmap to Success)



DEMOGRAPHICS

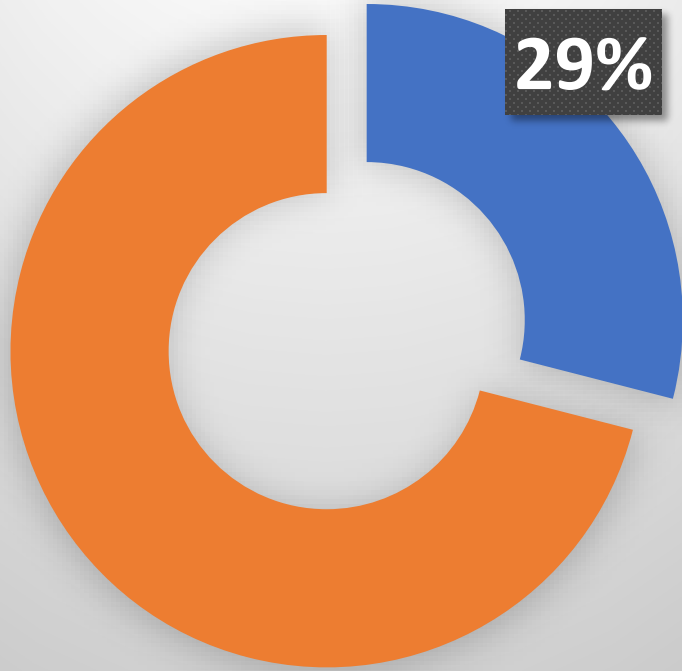


1,552 REAL ESTATE OFFICES



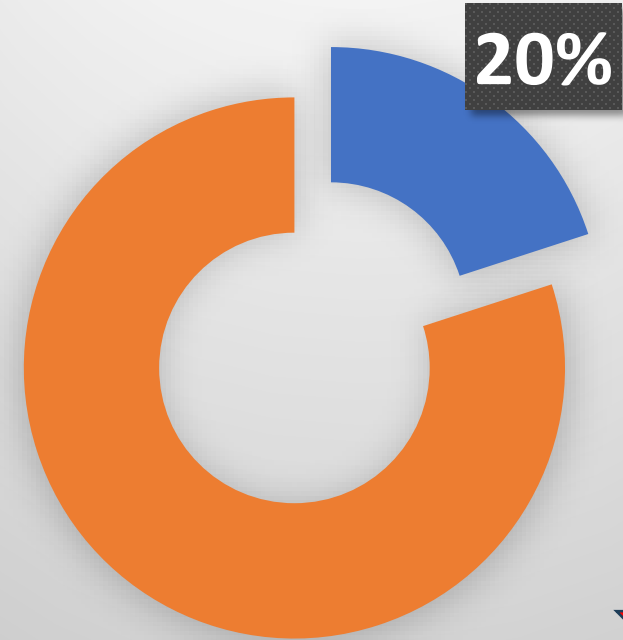
OFFICE SIZE – 5 OR LESS

2009



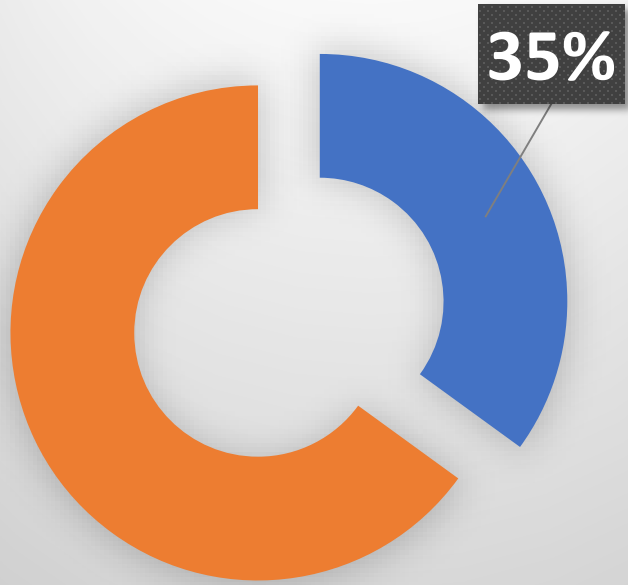
2019

1,171 Members



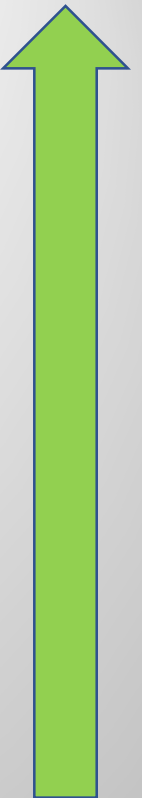
OFFICE SIZE – MORE THAN 75

2009



2019

2,566





WHERE ARE THEY WORKING?

35% WORK OUTSIDE
OUR MEMBERS NAR
JURISDICTION



CENTRAL COUNTY DISTRICT (697)

89% come from our NAR
Jurisdiction

78% live in the District



San Lorenzo
San Leandro
Hayward
Castro Valley

TRI CITIES DISTRICT (1,929)

79% come from our NAR
Jurisdiction

57% live in District
11% live in the Tri Valley



Newark
Union City
Fremont

TRI VALLEY DISTRICT (2,404)

58% come from our NAR
Jurisdiction

14% from Danville firms

10% from San Ramon firms

45% live in District

21% live in San Ramon, Danville,
Walnut Creek



Dublin

Pleasanton

Livermore

NORTH COUNTY DISTRICT (678) WHERE ARE THEY?

29% are in our NAR Jurisdiction

71% come from firms outside of our NAR Jurisdiction

- 28% from Oakland firms
- 24% from San Francisco firms

30% live in District

19% live in Oakland/Berkeley

15% live in the Central County

7% live in the Tri Valley



Alameda

2004

63% Company Office
35% Home

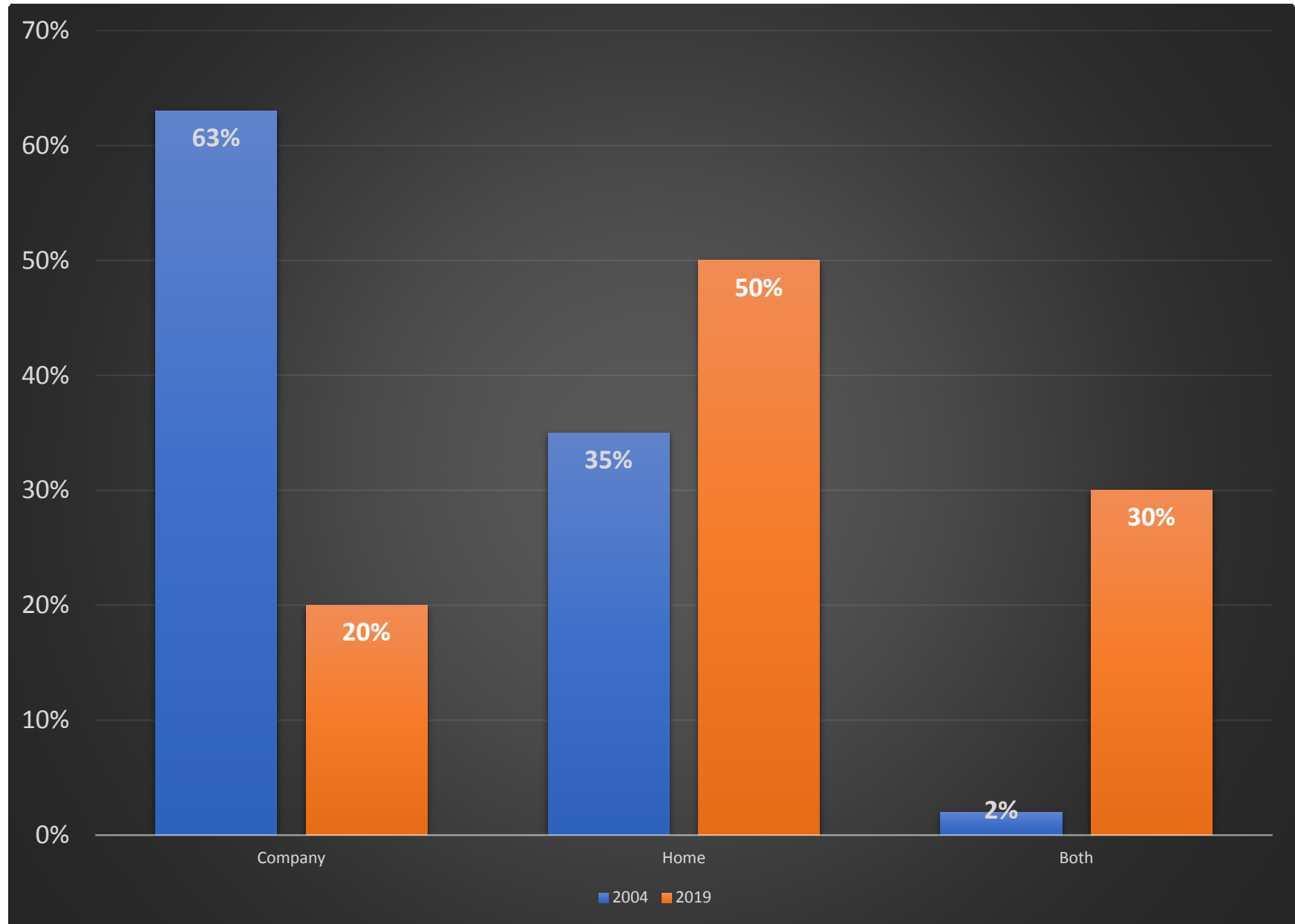




2019

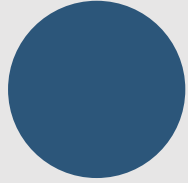
20% Company Office
49% Home
30% Both

WORK ENVIRONMENT



BRAINSTORMING

TRENDS



More than 35% of work outside our service area

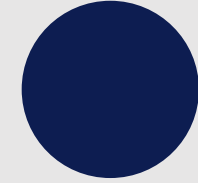
49% Work from Home

Big decrease in Office Attendance

Growth in Large Offices



OPPORTUNITIES



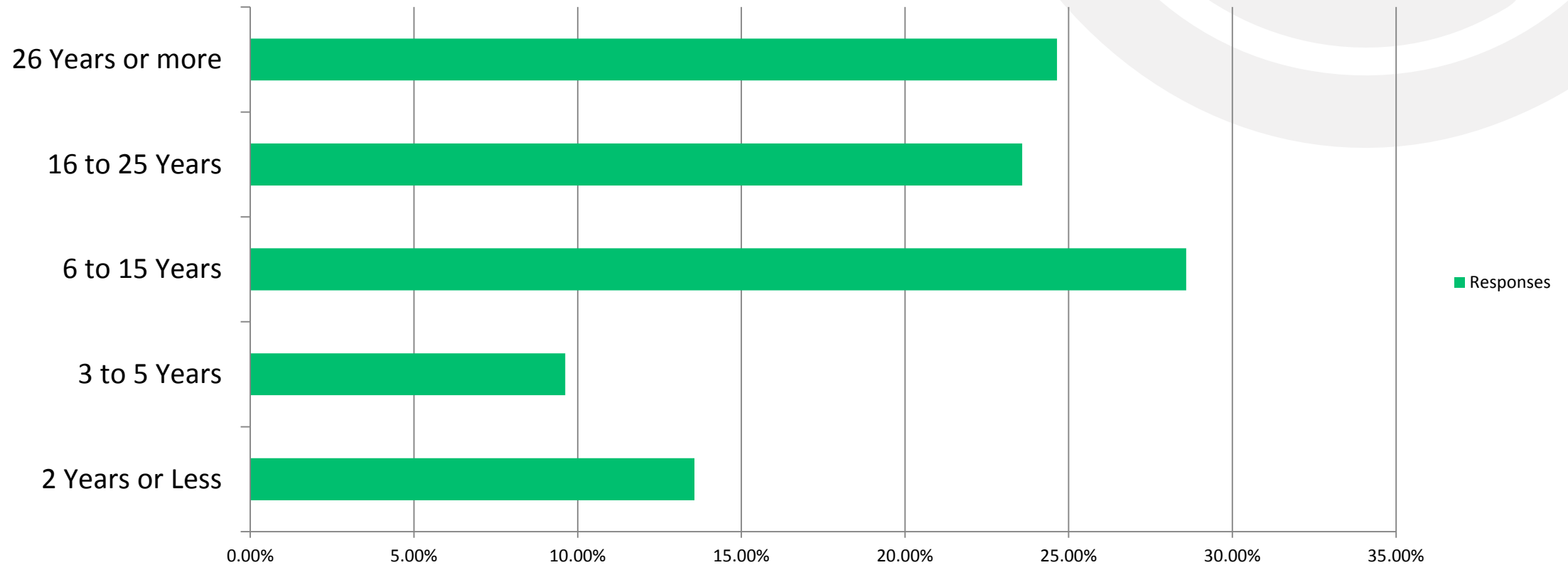
- Remote Learning
- Networking
- Expanded Advocacy Coalitions

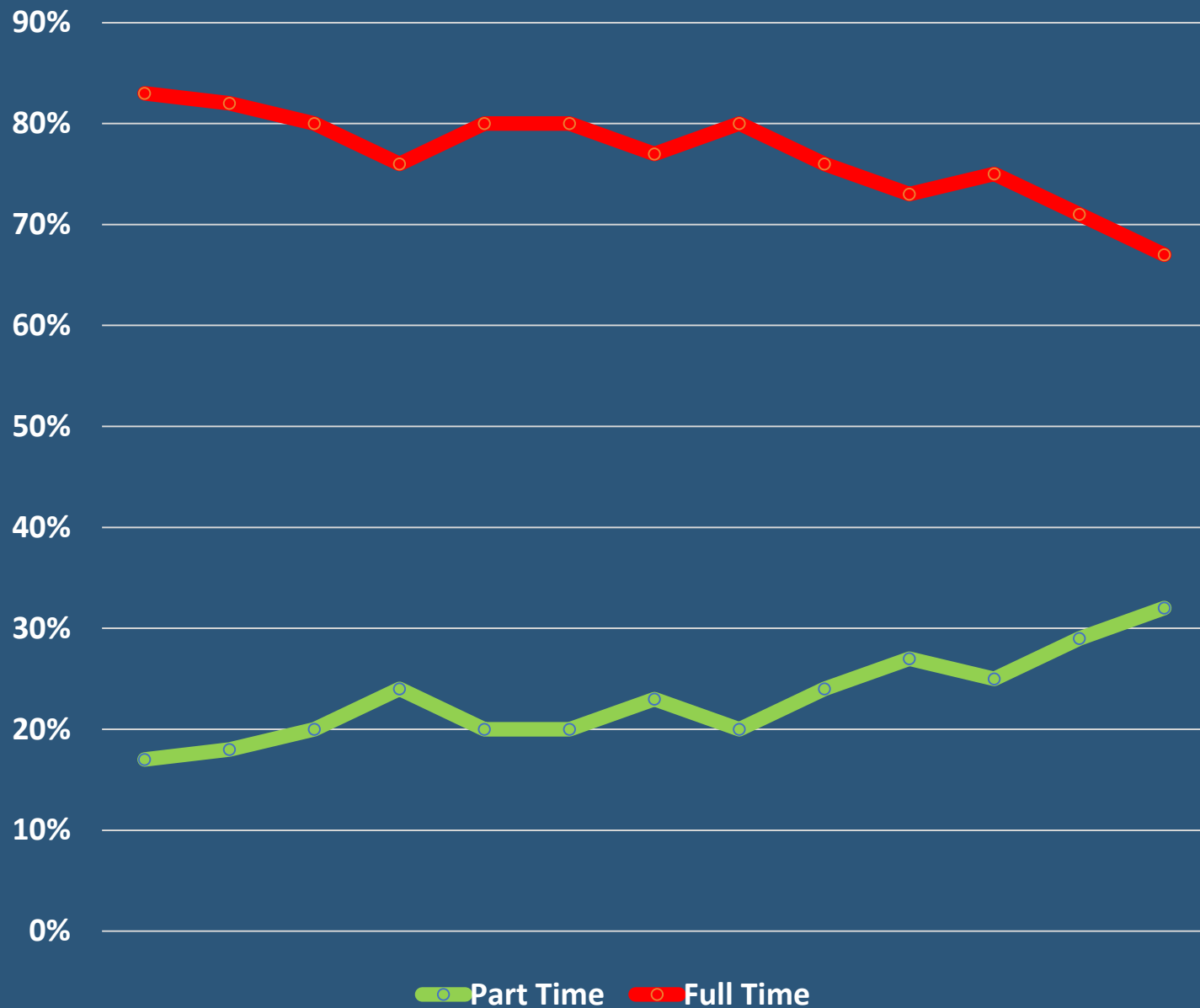


WHAT'S THEIR BUSINESS LIKE?

EXPERIENCE

How long have you been a REALTOR®?



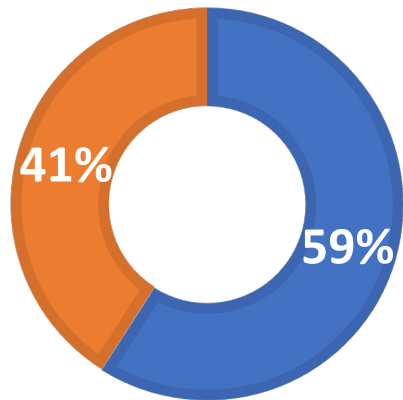


WHAT BEST DESCRIBES YOUR REAL ESTATE BUSINESS?

TRANSACTIONS

12 MONTHS REVIEW

■ At least 1 ■ None

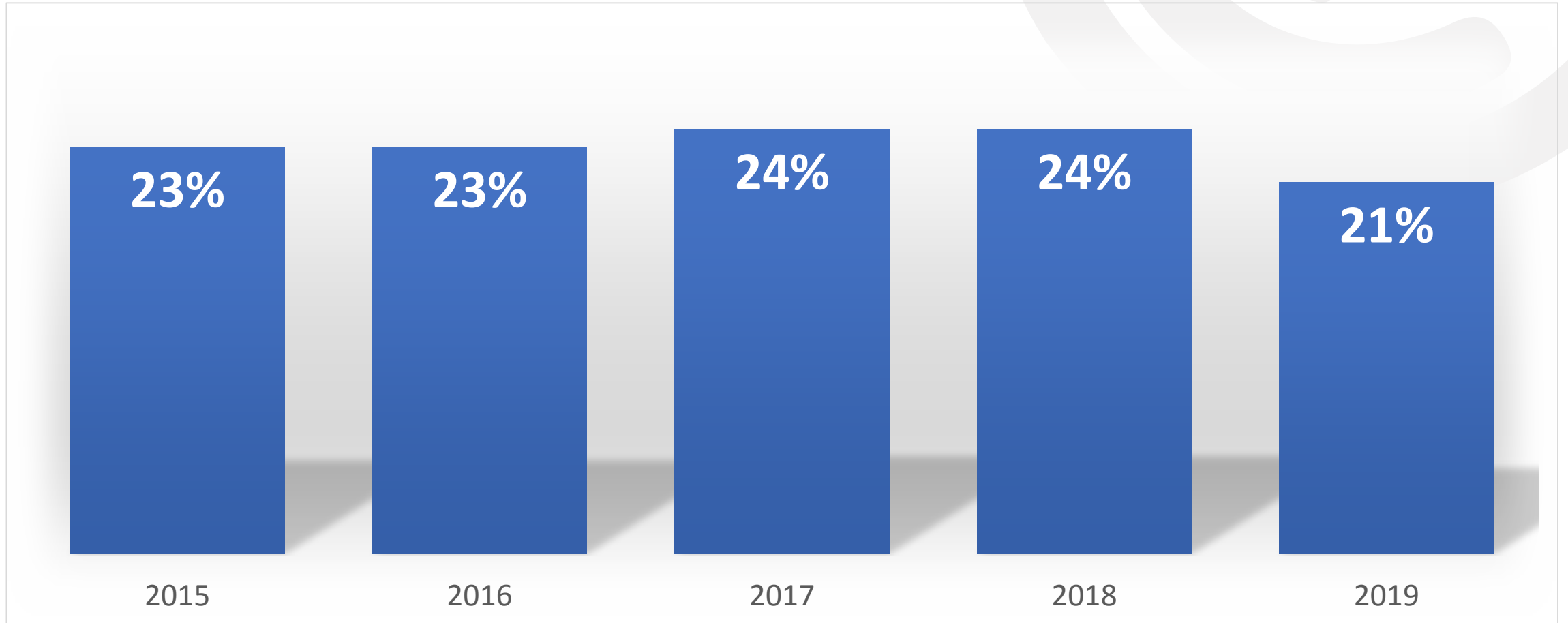


Average Transaction Sides = 6

3% of our Members had 25% of the Transactions

- 35 members make up the top 10% of sold listings (35 or more listings)
- 144 members make up the top 25% of sold listings (20 or more listings)
- 314 members make up the top 40% of sold listings (13 or more listings)
- 473 members make up the top 50% of sold listings (10 or more listings)
- 1123 members make up the top 75% of sold listings (5 or more listings)

ARE YOU ON A TEAM?



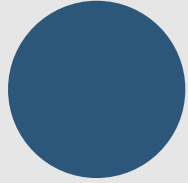
TEAMS

- 35% are New Agents
- 16% have been agents for 3-5 Years
- 27% of Teams are small (Team Partners)



BRAINSTORMING

TRENDS



Almost half our members haven't had a single transaction in 12 months

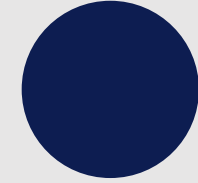
21% Are on a Team

More agents are working Part Time

51% of team members haven't seen a "normal" market



OPPORTUNITIES





WHAT DO WE KNOW ABOUT THEM?

DIVERSITY

40% speak another language fluently

By 2015, 55% of our members were Non-Caucasian



MEMBERSHIP PERSONAS



BROKER

20% of our
membership



NEW AGENT

14% of our
membership



SEASONED AGENT

51% of our
membership



RETIRED

15% of our
membership

MEMBERSHIP PERSONAS



TEAM LEADER

7% of our
membership



TEAM MEMBER

8% of our
membership



TEAM PARTNERS

6% of our
membership



PLATINUM AFFILIATE

PLATINUM AFFILIATES – BUILDING THEIR BUSINESS

Independent Contractor

A member 2 years or less

Favorite Benefit – Networking

Motivation – Networking & Sponsorship

Frustrations - Need more opportunities for exposure, Networking

W-2 Employee

A member 3 – 5 years

Favorite Benefit – Networking opportunities and timely industry and organizational information.

Motivation – Networking

Frustrations – No access to weekly tour information

PLATINUM AFFILIATES – BUILDING THEIR BUSINESS

Owner

A member for 6 – 15 years

Favorite Benefit – Networking, exposure, [Find an Affiliate](#)

Motivation – Networking to build business

Frustrations – Not aware of the benefits. Website too REALTOR® centric

PLATINUM AFFILIATES – SPONSORSHIP

Independent Contractor

Highest interest in the Marketing Meetings

W-2 Employee

Highest interest in Education Classes

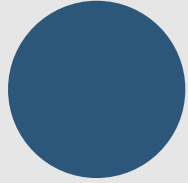
Owners

Highest level of support
Marketing Meetings rank the most popular

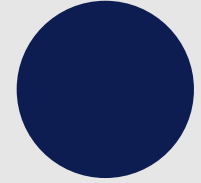
- Inaugural
- Bay East Education Class
- 100% Marketing Meeting
- 100% Foundation Event

BRAINSTORMING

TRENDS



OPPORTUNITIES



COMPANY OWNERS

DEMOGRAPHICS



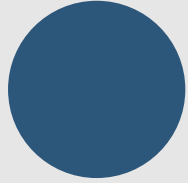
- 44% are the only one in their firm
- 35% have 2 to 5 agents
- 50% work from home
- 51% own rental properties
- 34% do Property Management
- 26% do Commercial Real Estate

- Property Management & Commercial Training
- Updates
 - Contracts
 - Market Dynamics
 - Industry Trends
 - Legal/Risk Management
 - Rent Control
 - DRE rules/training
- Business-Transitioning to Retire
- New Technology

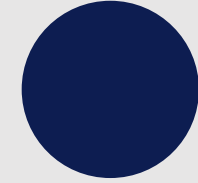


WANTS & NEEDS

LACK OF PROFESSIONALISM



“There are a ton of agents who do not follow showing instructions and think if there’s a lockbox that they can try to enter a property. Also, so many buyer’s agents will open a house for an inspector and leave them there by themselves or even worse will leave their client at the house with the inspectors and go off and do other business and they think that is okay.”



“On several occasions, agents had the buyers “lock up” the property for them after they had already left. These latter items are unacceptable and IMO people should lose their lockbox access for these types of violations.”

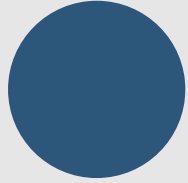
LACK OF COMMON SENSE

*Teach people
how to spell and
punctuate correctly and
put down the toilet seat
before taking real estate
listing photos*

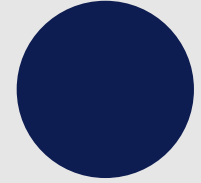


BRAINSTORMING

TRENDS



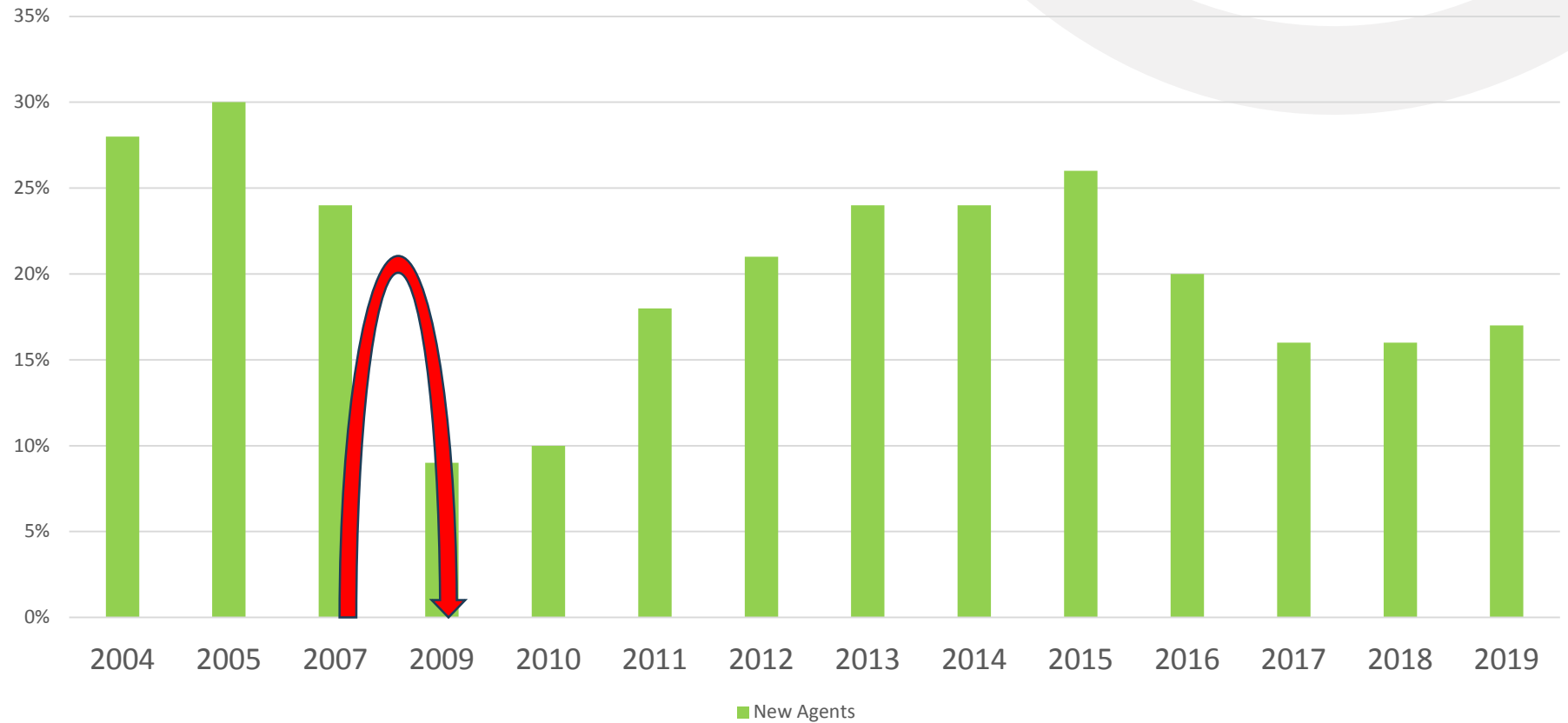
OPPORTUNITIES



NEW MEMBERS

2014	2015	2016	2017	2018	2019
644	715	671	828	739	609

New Agents



New Agent

- **50%** Will drop out after the first 24 months
- **45%** Start at large offices
- **43%** Are part time
- **31%** Are on a Team
- **50%** Are in offices of 50+ agents
- **53%** Primarily work @ home
- **13%** Primarily work @office
- **34%** Are renters
- **100%** Use the website
- **81%** Are certain they'll be in real estate for 2+ years

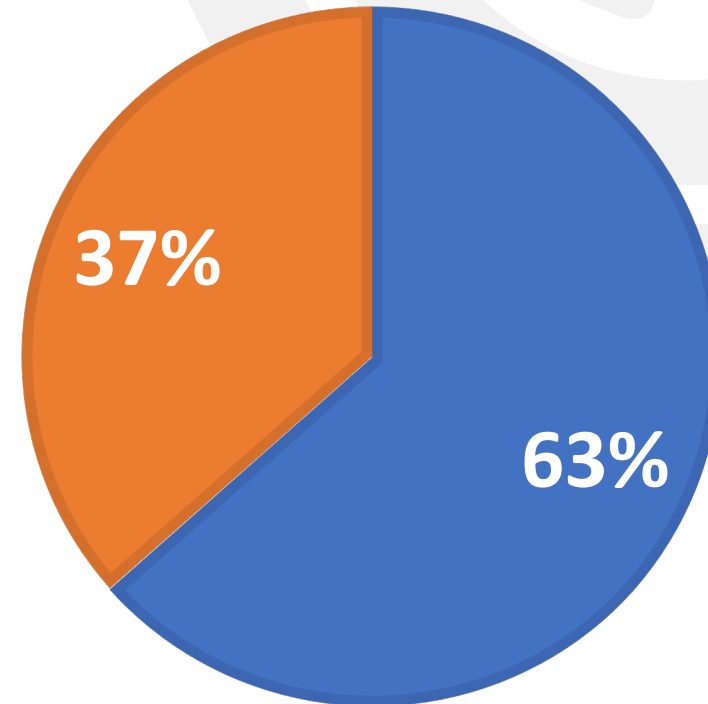
**2% ARE DOING 22% OF
THE TRANSACTIONS**

13% HAD 1 TRANSACTION

**59% HAD NO
TRANSACTIONS**

Type of Transactions

■ Buyers ■ Sellers



NEW AGENT - WANTS AND NEEDS

Lead generation, prospecting

Marketing

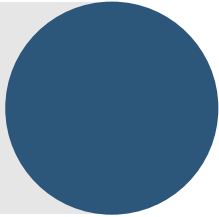
Insights on Market Conditions and what to do with that knowledge

On-demand learning

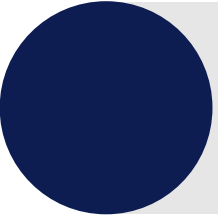
Networking

Mentoring-From Start to Closing...and beyond (Negotiation skills, CMAs, RE Financing, Contracts)

Investing and Commercial

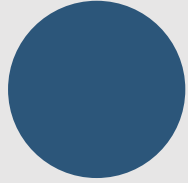


“Advice from NEW agents (I don't relate to agents with 10+years of experience who no longer experience rejection or spend time prospecting) Online content: group by which process the products would help with (nurture leads/service buyer clients/promote listings, etc.) Ideas how to "share" that I can give my clients these services, which would help me market myself. Networking groups/opportunities. Also advice for newer agents to start networking (Even if it's not an event you're hosting, ideas on groups we should join, or something-I don't know”)

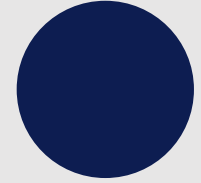


BRAINSTORMING

TRENDS



OPPORTUNITIES



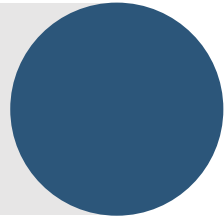
SEASONED AGENT

- The longer a member has been with us, the more delighted and the more they value our services (56% Always & 82% combined)
- Over 20% of their business is property management and 18% is commercial;
- 25% are Semi-Retired & 4% are Retired



SEASONED AGENT - WANTS AND NEEDS

Training!!!!!!
Social Media, Marketing, Latest Tech



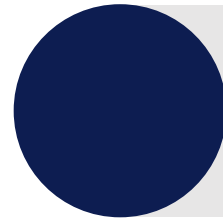
Prospecting

Property Management & Commercial

Sales Training

How to deal with a Shifting Market

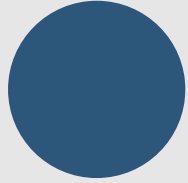
“Experienced Realtors are not feeling optimistic for the future of the Multiple Listing Service. Redfin, Zillow, Open Homes and other progressive Real Estate services are now in direct competition with us. Zillows plan is to purchase homes from the same potential sellers that we’ve given them access to. I feel that we’re not getting the bang for our buck, unless you’re a new agent that needs continual training and professional development.”



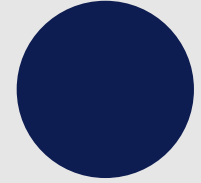
It seems that only the top 3% are really making it to make this profession as their main means of income, to survive the high standard of living in the Bay Area.

BRAINSTORMING

TRENDS



OPPORTUNITIES





**SEMI &
RETIRED**

67% are agents who have been in the business more than 25 years

8% are New Agents

19% are on a Team

57% are the only one in their office

72% work from home

44% own rental properties

19% do Property Management

SEMI & RETIRED- WANTS AND NEEDS

Property Management

Listing/Selling Probate Properties

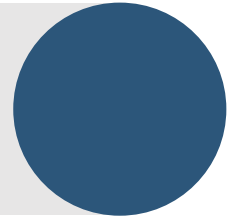
CE courses & License Renewal

Legal Updates

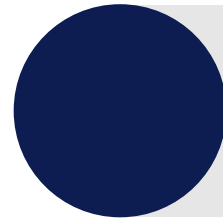
Marketing

Commercial Investments

Technology

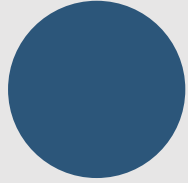


“ I am newly licensed and still learning everything from square one. Possible a class that takes you from meeting a client to listing there house or helping them buy one.”

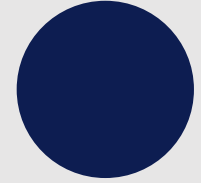


BRAINSTORMING

TRENDS



OPPORTUNITIES



TEAM LEADERS

- Most have been through the last housing downturn (79%)
- 39% are in firms of 1-5 agents &
- 33% are in firms of 100 or more agents
- 43% work primarily from the Office
- 47% own Rental Properties
- 22% do both Commercial & Property Management



TEAM LEADERS -WANTS AND NEEDS

Marketing, Social Media

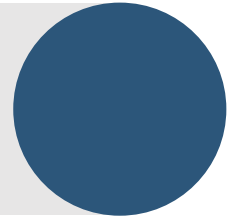
Networking

Contracts and Legal Updates

New, New, New

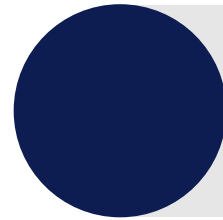
Team-specific Training

Lead Generation



“ Certify for open house basics. This training is severely lacking. Huge need for agents to be safe, professional and know how to update owners and others.”

“A series for new agents on how to find business. Also a series that could possibly help those of us with assistants.”



TEAM MEMBERS

- 35% are New Agents
- 30% are Part-Time
- 9% are Retired or Semi-Retired

- 30% are in Small Offices
- 28% are in Large Offices

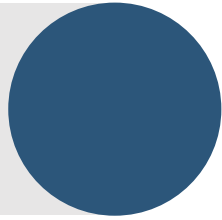
- 18% work Primarily from the Office
- 48% work Primarily from Home

- 27% are Renters, 74% are Homeowners
- 19% own Rentals



TEAM MEMBERS -WANTS AND NEEDS

Marketing, Social Media, Video
(Lead Generation)



New Agent Training

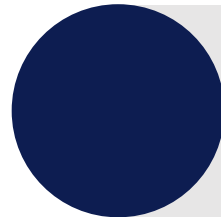
Contracts and Legal Updates

Market Insights

Tenant Laws

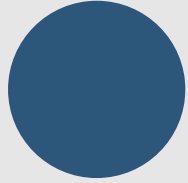
“ You do a great job now, I just wish I had more time to take advantage of it. If there were more videos, this would work with my time schedule.”

“ Regional expertise and sales strategies.”

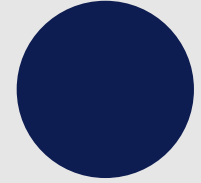


BRAINSTORMING

TRENDS



OPPORTUNITIES



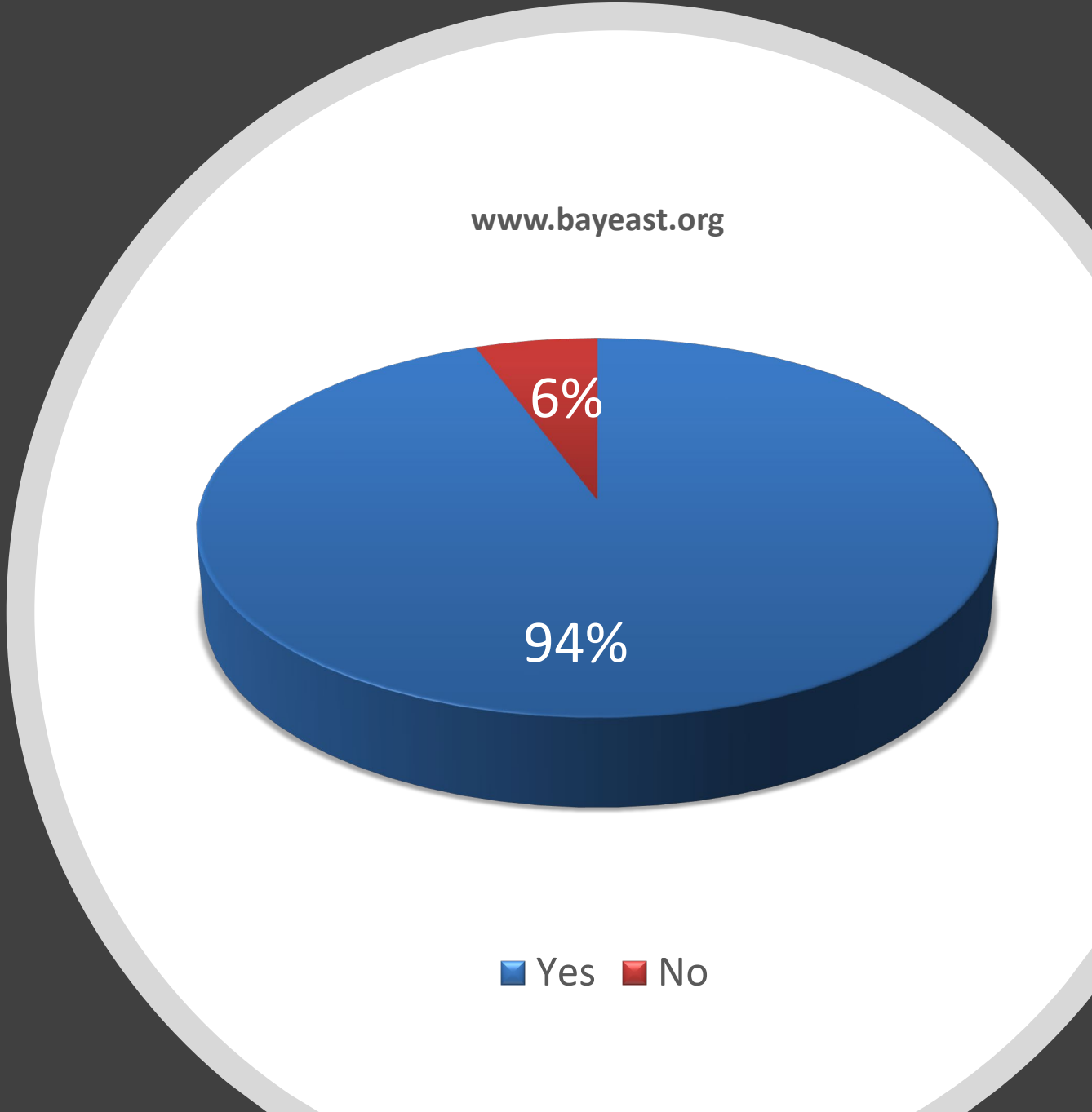


HOW DO THEY CONNECT WITH US?

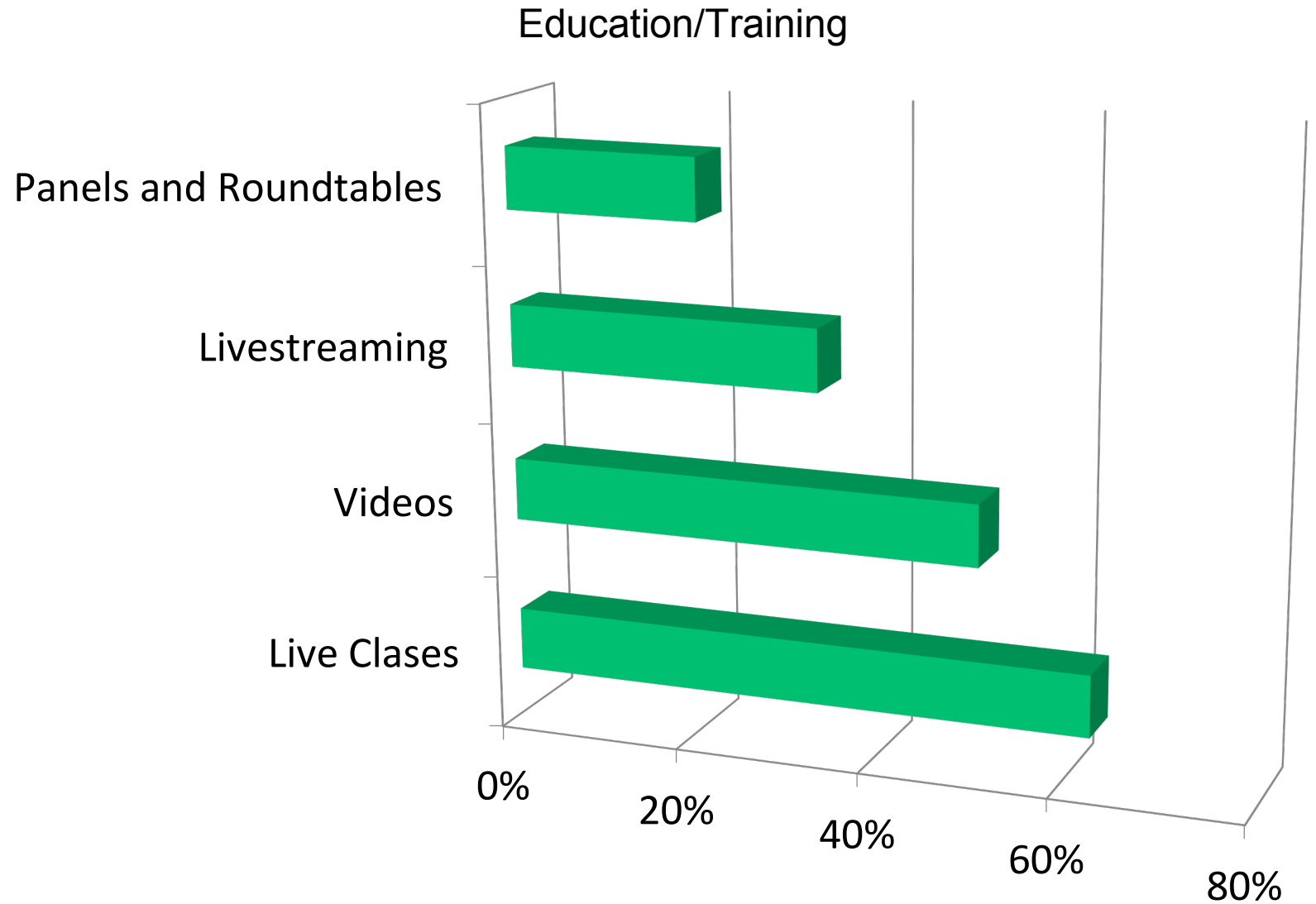
USE BAY
EAST
SERVICES

999%

VISITED OUR WEBSITE



LEARNING ENVIRONMENT



“Live classes where we can meet other professionals”

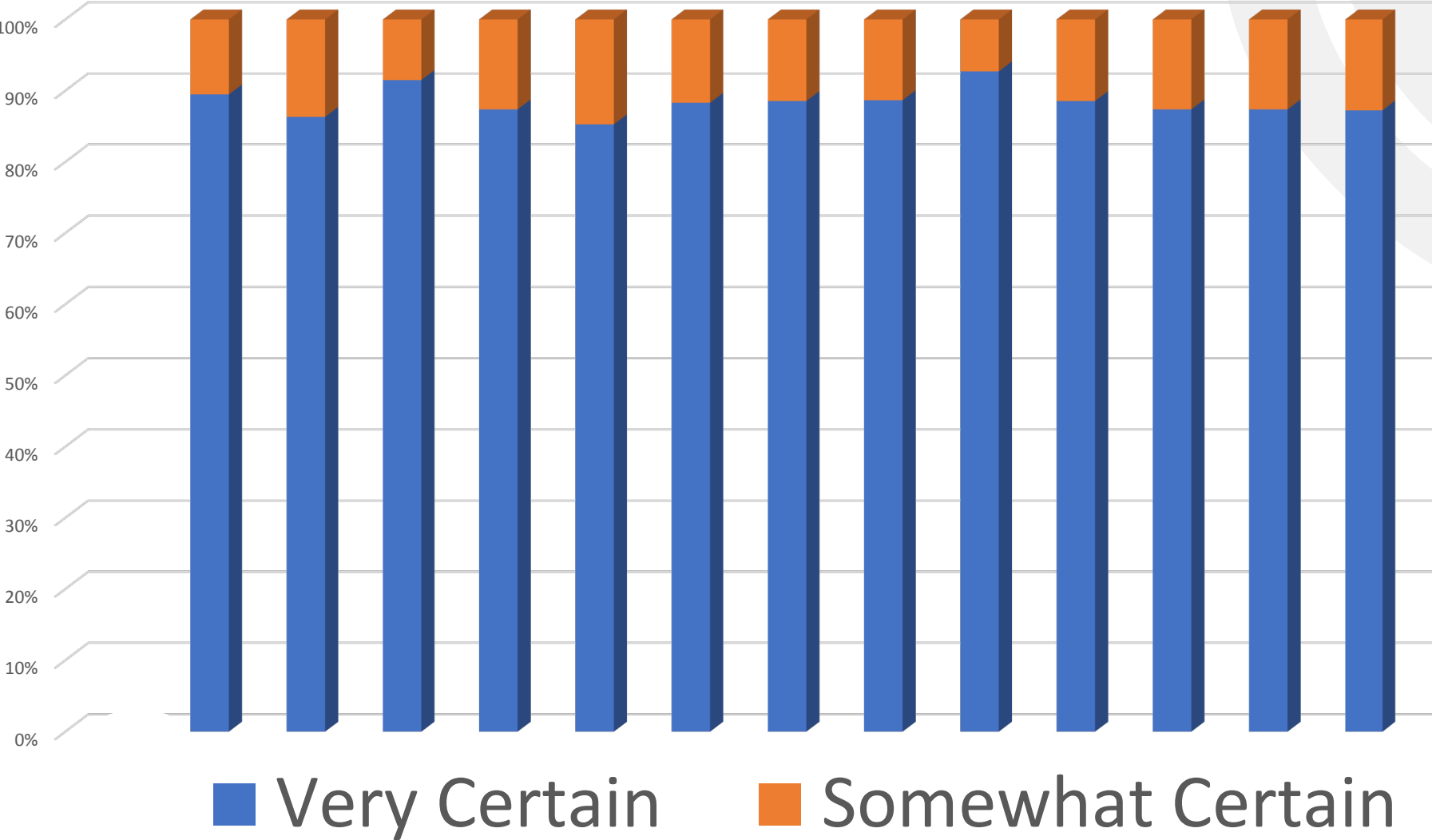
OTHER MISCELLANEOUS FACTS

- 45% are Always Delighted by our service
- 36% are Often Delighted

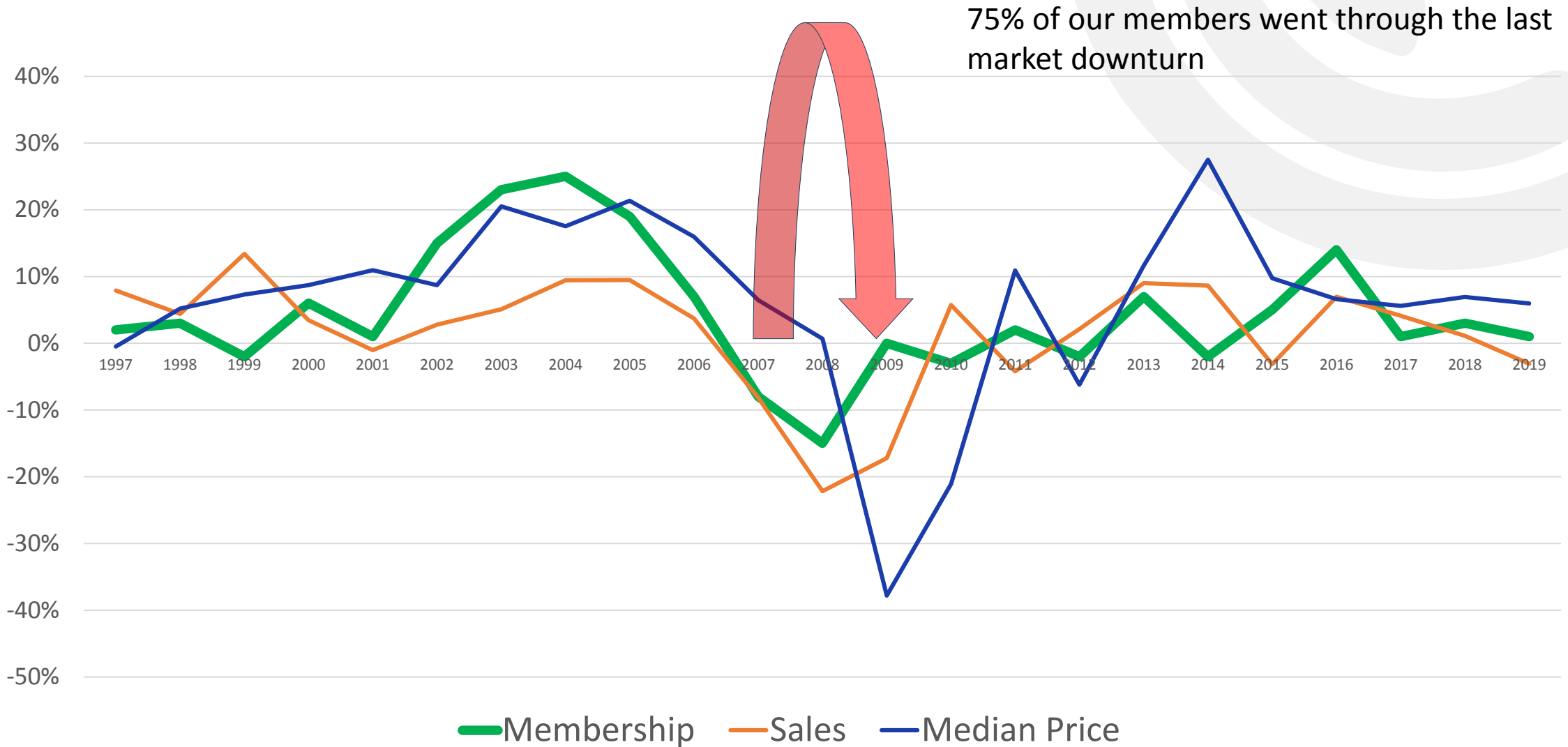
- 55% Always find our services Valuable
- 27% Often find our services Valuable
- 2% Rarely or Never

- 1% have Never used our services

MEMBER CONFIDENCE INDEX

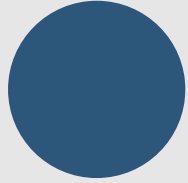


THE HOUSING MARKET & MEMBERSHIP

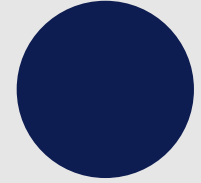


BRAINSTORMING

TRENDS

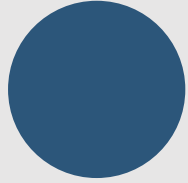


OPPORTUNITIES

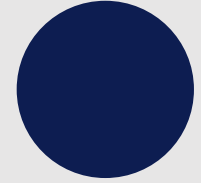


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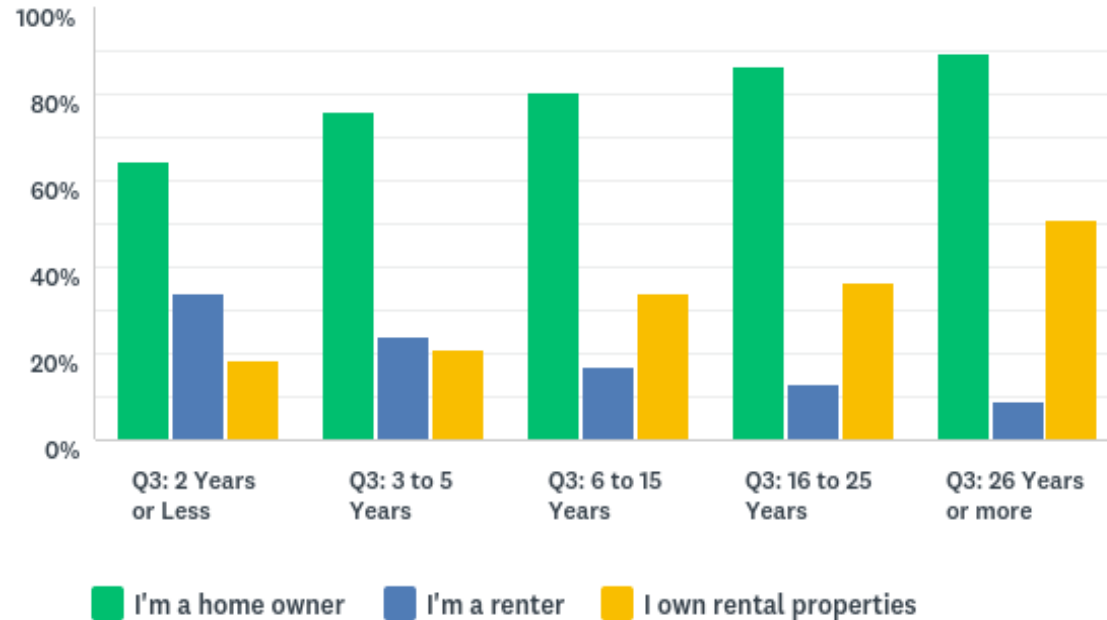
TRENDS



OPPORTUNITIES



PROPERTY OWNERSHIP RATES



- 82% own their own home
- 18% are renters
- 35% own rental properties