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**Earthware**

interactive mapping solutions

Who leads the way in Interactive Property Mapping?

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In order to help with the launch of our new interactive property mapping product, we thought it would be a good idea to take a look at what the mapping looks like for a number of the top Estate agency chains and property portals.

Our findings are hardly scientifically robust, and we thought hard about whether to publish these, but given we had done the hard work, we thought it might be interesting. What we did was take a look at every website (in early March 2008) and look at their maps to find out:

- Do they use mapping at all?
- Do they have a map that has multiple properties on it (as opposed to a map for just a single property at a time)
- What underlying mapping technology each website used (API) ?

and for property portals, we also:

- Examined what data was included in the mapping
- Rated the quality of the mapping (from our point of view)

## *The Background*

I guess we ought to make a few things clear before diving into the analysis. Firstly, we conducted this research over a week in early March - it is therefore already potentially out of date and any conclusions should be considered with that in mind. Secondly, any rating or judgement is purely subjective on our point and therefore open to both scrutiny and challenge - we are definitely not aiming to upset our potential customers!

The top 50 Estate Agents were based on a list published by Estate Agency News and the top 20 portals based on a list published by Estate Agency Times in January and February 2008 respective. We acknowledge the copyright and have offered links in this article to the original articles.

# The Analysis

## Top 20 Portals

Please see the following table for our view on interactive mapping in the top 20 portals (plus Globrix and Look4aProperty which we included as they both are well known portals but didn't appear on the list).

#	Portal	Portal Analysis						Mapping Analysis					
		TUV	MpU	PpV	P#s	Offices	CtA	PpP	Multi	Prop	Data	API	Qol
1	RightMove.co.uk	2,276	42	92	1,021,233	18,528	690,512	n/a	N	Y	HS,Sc	MSVE	3
2	FindaProperty.com	959	17	28	365,068	6,898	235,024	£315,951	N	Y	None	GM	1
3	PropertyFinder.com	842	7	17	290,000	6,521	n/a	£342,000	Y	Y	None	GM	2
4	Vebra	735	9	15					Y	Y	None	MM	1
5	PrimeLocation	709	11	21	324,191	7,045	140,430	£376,670	Y	Y	Sc,R,At,T	MSVE	4
6	ThinkProperty.com	378	9	16	310,127	5,701	n/a	n/a	Y	Y	Sc,H,St	GM	3
7	UKPropertyShop.com	367	1	3					NA	NA	NA	NA	0
8	AOL Real Estate	340	3	11					NA	NA	NA	NA	0
9	Fish4Homes	320	7	13	497,886	7,724	32,414	£188,044	N	Y	None	F4H	1
10	HomesonView.co.uk	305	7	22					Y	Y	None	GM	1
11	Email4Property	300	0	3					NA	NA	NA	NA	0
12	OurProperty.co.uk	288	3	7					NA	NA	NA	NA	0
13	HomesandProperty.co.uk	272	5	12					N	N	None	NA	3
14	Your-Move.co.uk	244	7	21					N	Y	None	GM	1
15	Nestoria.co.uk	235	4	7					Y	Y	None	GM	1
16	HotProperty.co.uk	235	3	5	169,085	2,662	39,800	£296,625	Y	Y	None	GM	3
17	JustOverseas.co.uk	207	1	2					N	N	None	NA	0
18	HousePrices.co.uk	198	5	6					Y	N	None	GM	1
19	ExpertAgent.co.uk	186	7	16					NA	NA	NA	NA	0
20	EstateAngels.co.uk	174	2	7					NA	NA	NA	NA	0
?	Look4aProperty.co.uk								Y	Y	T,Sc,St	GM	3
?	Globrix								N	Y	None	GM	3

Key	Maps	Map APIs	Data
TUV Total Unique Visitors (000s)	Multi Multi property map	MSVE MS Virtual Earth	HP House Prices
MpU Average Minutes per User	Prop Single property map	GM Google Maps	Sc Schools
PpV Average Pages per User	Data Data on map	MM Multimaps	R Restaurants
P#s Total UK property numbers	API Mapping API	F4H Fish4Homes own	At Attractions
Office Total no of UK offices uploading	Qol Quality of		T Transport
CtA Telephone calls to agents	Mapping information		St Stations
PpP Average price of property for sale £ Charging Information			H Hospitals

## Observations

We would draw the following observations based on our research:

**1. Google Maps leads the way**

Google Maps currently leads the way with nearly 50% of the portals (10 out of the 22) in this list.

**2. The UK is seemingly behind in the move to Virtual Earth**

Despite the significant move in the US Real Estate companies across to Microsoft's Virtual Earth product (mainly due to the Bird's Eye imagery), the UK portals are lagging behind with only two of the 22 in this list.

**3. Mapping still has a long way to go**

Despite technology being core to portal propositions, only 8 of the 22 have a multiple property map. This would indicate that there is plenty of room for portals to maximise the value they can extract through interactive mapping and improve the experience of their users.

## Top 50 Estate Agents

Please see the following table for our view on interactive mapping in the top 50 Estate Agents.

Mapping Analysis					
League Rating 2008	Estate Agency Group	Jan-08	Multi	Prop	API
1	Countrywide plc	1176	n/a	n/a	n/a
2	Connells	499	N	Y	MM
3	§ LSL Property Services plc	460	Y	Y	GM
4	μ Halifax Estate Agency	328	N	Y	MM
5	Spicerhaart	227	N	Y	MM
6	Arun Estates	123	N	Y	GM
7	Hamptons International	82	N	Y	MM
8=	Humberts	81	N	Y	MM
8=	Savills	81	N	Y	MM
10	Kinleigh Folkard & Hayward	67	N	Y	own
11	Andrews Estate Agents	57	N	Y	MSVE
12=	Knight Frank	52	N	Y	GM
13	* Strutt & Parker	51	N	Y	MSVE
14	Chancellors Estate Agents	50	N	Y	GM
15	¶ Badger Holdings	44	Y	Y	GM
16	Jackson-Stops & Staff	42	N	Y	GM
17	Bradley's	40	N	Y	MM
18=	Acorn Group	34	N	Y	GM
18=	Farrell Heyworth	34	N	Y	GM
20	# Jump Estate Agents	30	N	Y	GM
21	Keith Pattinson Limited	29	N	Y	MV
22=	O'Riordan Bond	26	N	Y	MM
22=	Goadsby	26	N	Y	GM
24	Peter Alan	25	N	Y	GM
25	Foxtons	23	Y	N	FO
26	† Thamesview	22	Y	Y	GM
27=	Chestertons Residential	21	N	Y	CH
27=	Rook Matthews Sayer	21	N	Y	GM
29=	Burchell Edwards	20	Y	Y	GM
29=	Dacre Son & Hartley	20	N	Y	MM
29=	Harrison Murray	20	Y	Y	GM
29=	Smiths Gore	20	N	Y	MSVE
29=	The Venmore Partnership	22	N	N	n/a
34	Nottingham Property Services	19	N	N	n/a
35=	Besley Hill	18	N	Y	MM
35=	Cluttons	18			
35=	‡ Henry Adams	18	Y	Y	Multi - MSVE, Prop - GV
35=	John Francis Estate Agents	18	N	Y	GM
39=	Curchods	17	Y	N	GM
39=	Edward Mellor	17	Y	Y	GM
39=	McCartneys	17	N	N	n/a
39=	Manning Stainton	17	N	Y	MM
39=	Stags	17	N	N	n/a
39=	Webbers	17	Y	Y	GM
45=	Douglas & Gordon	16	N	Y	GM
45=	Miller & Son	16	Y	N	GM
45=	Newton Fallowell	16	Y	N	GM
48=	Howards	15	N	Y	GM
48=	Pearson's	15	N	Y	MSVE
50=	Cheshire Property Services	14	N	N	n/a
50=	Romans	14	N	Y	GM

In summary, the following table outlines the different types of mapping API being used and how prevalent they are:

API Code	API Name	#
GM	Google Maps	24
MM	Multimap	11
MSVE	MS Virtual Earth	4
MV	MapViewer	1
FO	Foxtons Own	1
CH	Collins Harper Publishers	1

## Observations

We would draw the following observations based on our research:

- 1. Google Maps leads the way**  
In a similar manner to the top 20 portals, Google Maps currently leads the way with nearly 50% of the top Estate Agency sites (24 out of the 50).
- 2. Multimap still has a strong hold**  
Unlike the portal list, the UK based Multimap retains a strong presence in the UK Estate Agency market. Since the buy out by Microsoft, Multimap's API has been further strengthened by the inclusion of Bird's Eye imagery from the Virtual Earth API.
- 3. Mapping still has a long way to go**  
In a similar trend to the top portals, only 12 of the 50 have a multiple property map (less than 25%). This would indicate that there is plenty of room for Agents to maximise the value they can extract through the use of interactive mapping in their websites. It certainly might be an area where Agents can positively differentiate their web offerings in the minds of their customers.

## Summary

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We hope that the time we have taken to look at the interactive mapping for leading websites in the UK residential property market will be of interest. Should you have any questions about how we conducted the analysis, or would like to chat through any of our conclusions, please contact Neil Osmond at Earthware (neil@earthware.co.uk or 0845 642 9880).