2013 Review of Top MLS Listing Websites
Introduction

In 2009, Clareity Consulting studied every MLS listing website in the United States and found most of them to be severely lacking in features and deficient in other criteria. This study is an update to that one, evaluating the listing websites of the top 100 MLSs by size. Of these MLSs, 63 had listing websites, which collectively represent approximately half of the residential listing content in the United States.

The goals for this paper are to provide material for industry discussion, to drive conversations between MLSs and their technology providers, and to help the industry move toward improvement of its MLS listing websites. The industry needs to provide a better search experience for consumers and to maintain and improve upon that consumer relationship. This will provide consumer exposure for subscribers and their listings as a reliable low-cost benefit.

The Feature Landscape

MLSs have dramatically improved the functionality of their websites over the past four years. As illustrated below, in 2009 over 90% of MLSs had less than 50% of the features Clareity was tracking while, in 2013, 65% have the majority of tracked features, even as the size of the tracked feature set has increased.

In order to field highly functional websites, most of these MLSs have moved away from the free websites provided by MLS vendors. A few have improved their websites’ capabilities by purchasing a premium website from their MLS vendor, while 29% have either developed a custom website by themselves or with technology partners and 61% have leveraged the capabilities of IDX vendors.
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Following is a chart that shows all of the main features Clareity is tracking across the top 100 MLS listing websites, and the prevalence of each:

![Feature Prevalance Chart]

Following is a detailed breakdown of those features.
Finding Properties

There are two basic ways of finding houses on an MLS site. One is by typing features of the desired house into a form and receiving a list of results, from which one can drill down to individual listing pages. A second is by defining an area on a map, limiting the results by adding features, and seeing the results returned as houses on the map. You can drill down to listing pages by clicking on the houses. Often, sites will use a hybrid approach, where one can view results either as a list or as a map. 71% of sites studied had some kind of map search.¹

Many sites allow you to begin your search by typing a street address, city, state, zip code, and/or MLS number into a search box. In Clareity’s 2009 study, a couple of sites went a giant step further, by creating something much closer to Google’s free-form single-line search. In a single-line search, you can type in things like “fireplace pool 92663” and get all properties in Newport Beach, California which have both a fireplace and a pool. It was a great innovation, but it did not get much traction among MLSs and their technology providers. Only one of the MLSs studied offers this feature today.

One of the best things to happen in MLS search is a feature called “count on the fly,” offered by 46% of sites. Every time you enter or change a search parameter, the feature tells you how many houses you will find, letting you know when a potential search is fruitful. Some MLS software has a “Preview Search” button which purports to do the same thing, but you only get a property count when you press the button, leaving you guessing why you’ve gotten your result. There are two bad search outcomes that count on the fly avoids – one is finding no listings and the other is finding more listings than the MLS will display. In both cases the visitor must ping-pong back and forth between the search criteria screen and the results screen to figure out why this is the case. This can be very frustrating. There is no good reason not to provide either count on the fly or its visual equivalent, where listings are shown on a map as criteria are changed.

Ideally, when you retrieve a batch of houses, it’s good interface design if you can change the criteria without leaving the results screen. 59% of the sites studied had this feature, at least allowing some criteria to be changed.

Search Filters / Content

Some MLS websites include search parameters for different kinds of lifestyle activities, including walkability, retail access, public transportation, golf or water access, etc. Only 8% of sites have a lifestyle search.

35% of sites have the ability to search for new listings; in some cases, you can specify the maximum age in days of the listings you want to retrieve. Only 16% of sites allow you to search for pending or sold listings, useful when you want to look at comparable properties. It seems likely that in the future, to

¹ Note: not included in this figure are sites that used static maps as illustrations.
remain competitive with national listing advertising sites, more MLSs will allow for local display of pending or sold listings and/or display that information via public records display.

70% of sites have some kind of open house search, either integrated directly into property search or available as a separate search from the site’s top-level menu.

A number of sites, especially in economically hard-hit regions of the country such as Florida, have options for short sale (24%) and foreclosure (32%) properties. In the case of one Florida MLS, the search options go much further than that, offering extremely fine-grained selection capability for every phase of the foreclosure and bank ownership process. The market will drive need for this feature.

**Details about Individual Properties**

72% of sites feature maps showing the location of the property being displayed. The simplest and least sophisticated implementations of property maps are simply links to Google Maps or another online mapping application, or popup windows in which such links are loaded. Better implementations use their own map data, overlaid with their own points of interest.

While property maps generally show a “top-down” photograph or schematic view of a house, sites with “aerial view” or “bird’s-eye view” let you see the property from above but from a slight angle. This can be useful in visualizing a house, but only 33% of sites let you see a property this way.

Multi-property maps allow the consumer to view multiple properties on the same map, so that the consumer can see them in relation to one another, estimate distance between them, and, in the best case, be able to plan a neighborhood open house tour. All such maps use icons to represent house locations, but the best ones use different icons to represent open houses, new listings, and even price drops. 64% of sites offer multi-property maps.

The advantages of having many pictures of a property rather than one should be obvious. Nonetheless, 9% of top MLS listing websites still show only one picture per property.

“Virtual tours” were a hot idea years ago, but the implementations mostly looked like slideshows with perhaps a little wiggle here and there to simulate motion. Most virtual tours still have that limitation, and are displayed by only 13% of sites.

**Personalizing Your Searches**

46% of sites allow the consumer to save searches, 24% allow the consumer to receive email updates on properties and 24% allow the consumer to compare listings side by side. **Features allowing consumers to save searches and/or listings and receive email updates are crucial for the long-term usability of the website by consumers and should be implemented by more than a minority of websites.**
Sharing and Printing Properties

A supermajority of sites (73%) allow you to send an email with a listing to a friend, and a similar number (78%) give you a version of a property detail page that is formatted so that you can print it easily. 45% of sites let you post a link to a property detail page to social media sites, such as Facebook and Pinterest, so that you can share the specs on that dream house with your friends. Many sites seem to use the same generic Web toolbox to display the identical row of links to social media sites, and that can mean that some of the social media sites are not particularly relevant; it is unclear, for example, why a consumer would want to show off his or her taste in homes to his or her business associates by sharing a property via LinkedIn.

Neighborhood Features

Although having a full range of visuals and data about a home’s immediate property is undeniably the central issue for homebuyers, most also would like to have a clear sense of the home’s neighborhood. In this respect, most MLS websites provide scant information, and would do well to beef up their offerings. For example, families with children are often concerned about the quality of the schools to which they may send their children; however, only 13% of sites provide school performance data. Most of this data consists of numbers for the parent to crunch: student-teacher ratios, student-counselor ratios, and similar generic information. Greatschools.org, which is deep-linked by some MLS sites, puts this data together with test scores and, when available, local performance measurements, to create a single synthetic score that may be easier for consumers to understand. It may be that in future MLSs will begin to license this data.

Similarly, MLS websites provide prospective homebuyers with little information about the neighborhoods themselves: only 28% provide neighborhood and demographic data, 24% a Walk Score™, and 9% a drive-time search. A Walk Score™ is a measurement of how many different types of amenities, such as restaurants and post offices, are within walking distance of the property. A drive-time search allows the consumer to determine the commute time between the property and their job or other destination, but this is offered by only 9% of sites. Absent a points-of-interest feature from their MLS, most house shoppers will have to spend serious time with Google Maps and Yelp to find out about local schools, shopping centers, banks, and the like. Only 18% of MLS websites cover points of interest, but the best of those that do have found imaginative ways of integrating them with their mapping interface to make them easy to see alongside the listings.

Providing information beyond the listings themselves – especially neighborhood and points-of-interest information – is absolutely critical for MLS websites that wish to be competitive.

Visiting and Choosing a Property

Once a homebuyer has identified several properties of interest, he or she may want to compare their features. Currently 24% of MLS sites enable browsers to compare properties side by side. Although all sites allow you to contact the listing agent by email, it is psychologically easier for the consumer to take
that first step if that contact is for a specific purpose, scheduling a showing. 30% of sites have a dedicated “schedule showing” button in their user interface. 79% of sites allow you to find an office or agent, either through the property search page or through a separate search on the home page.

**Costs of an Individual House**

Information about comparable sales, a house’s sale history, and local market trends can help a buyer make an informed decision. Unfortunately, only 27% of sites offer historical and statistical information. The best sites integrate this information into their mapping interface, e.g., by mapping the locations of comparable sales in a neighborhood. Only 3% of sites offer AVM (automated valuation model), a way of determining house values by synthesizing public records and MLS data to predict selling price. Most curious is that only 64% of MLS sites offer a mortgage calculator, even though its value in providing users with a way to get a back-of-the-envelope calculation of expenses seems obvious.

**Advertisements and Policies**

Advertisements are a way for an MLS to monetize its site and connect consumers with services they may need during the home buying process. At the same time, they may detract from a site’s appearance of objectivity and authority. 16% of sites display advertisements. To comply with The Realty Alliance’s fair display guidelines, sites cannot display advertisements that compete with a broker’s affiliated businesses, such as mortgage or title companies. 37% of the 16% of sites displaying ads have ads that violated these guidelines.

A privacy policy gives the consumer reassurance that his or her personal data will not be sold, misused, or stored insecurely. Thoughtful consumers who care about their privacy expect such a policy. Only 40% of sites have a privacy policy, but it is worth noting that this is up from 10% in 2009.

While a privacy policy sets out some of a site’s responsibilities to its users, terms of service set out a user’s responsibilities to the site. These responsibilities include using MLS data only for personal use in shopping for a house, holding the MLS harmless in the event of faulty information, not “screen-scraping” or otherwise re-compiling data for commercial use and so on. Only 40% of MLS sites now post terms of service. There is also a single MLS site of those studied which makes users repeatedly assent to its terms of service by checking a checkbox each time that a user performs a search, and as has been discussed heavily in the industry, such click-wrap agreements are the strongest, most enforceable type.

**Appearance of Sites**

It can be difficult to field a website that is functionally robust yet rates highly for usability. For example, if one provides only a basic search (location, price bedrooms, bathrooms, square feet, lot size), it can be frustrating for those users seeking only listings with criteria such as a fireplace or duplex. Adding the capability to refine the search on the search results page is one way to handle it, but sometimes the
layout on those pages – trying to include search results as well as a plethora of new search options - can be overwhelming. This is why Clareity has advocated so long for “single line search” as well as count-on-the-fly features, which provide power along with usability.

Another usability issue, seen on too many sites, is a cryptic and poorly laid out listing detail page. Consumers expect web pages that are clear and easy to read, with sufficient white space, section headings, and legibly sized fonts. Some sites seem to be caught in a previous decade, when cryptic details and abbreviations had to be written to an 80-character wide terminal screen. Abbreviated, compressed field names and data in the listing can be expanded -“Gar Desc” should be “Garage.” Use white space and “normal” size fonts as appropriate. *Don’t treat the listing page like a data dump. You are not paying by the pixel. Make it easy for people to read the listings.*

### A poorly designed display

<table>
<thead>
<tr>
<th>Property Features</th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>Lot Information:</td>
<td>CORNER</td>
</tr>
<tr>
<td>On Waterfront:</td>
<td>N</td>
</tr>
<tr>
<td>Building Style:</td>
<td>COLONL</td>
</tr>
<tr>
<td>Construction:</td>
<td>WOOD</td>
</tr>
<tr>
<td>Stories:</td>
<td>2</td>
</tr>
<tr>
<td>Fuel Type:</td>
<td>GAS</td>
</tr>
<tr>
<td>HVAC:</td>
<td>FORCDAIR</td>
</tr>
<tr>
<td>Basement:</td>
<td>PARTIAL</td>
</tr>
<tr>
<td>Garage Spaces:</td>
<td>2</td>
</tr>
<tr>
<td>Garage Type:</td>
<td>ATTACH</td>
</tr>
<tr>
<td>Driveway:</td>
<td>BLKTOP</td>
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<tr>
<td></td>
<td>CIRCLE</td>
</tr>
<tr>
<td>Exterior Features:</td>
<td>CABLEAVL</td>
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<td></td>
<td>GAROPEN</td>
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### Accessibility

HTML validation is a measurement of how well your web page’s HTML markup can be read by another computer. Many web browsers are tolerant and can work around mistakes in your code, but search engines such as Google, and programs your organization or partners may write to leverage your site, rely upon your site’s being “clean” and validating without errors. This has historically not been an area where MLS sites have fared well, and, as in 2009, only one or two home pages were passed the validation tests this time. The interesting thing is that sites are showing many fewer validation errors;
whereas in 2009, the spike in the data was at 51-100 errors (49%), now the largest number of sites (38%) has between 1-25 errors. That’s getting a lot closer to acceptable – still, MLSs should work to ensure that their sites are as close to valid HTML as possible.

A problem related to HTML validation is web accessibility. Many blind and disabled users can’t browse the web the way able users can, by looking at the screen or moving a mouse. They rely on programs called “screen readers” to describe what’s on the screen, and on voice command software to move them through screens and menus. All of this software relies on your having a site that doesn’t put up barriers; there are sites that will let you check your public MLS site to see if and where there are barriers. It is worth tailoring your site to help disabled people. The U.S. Center for Disease Control says that 20% of all Americans have a disability of one kind or another; many of them buy houses. Out of the sites Clareity studied in 2013, **65% put up at least one show-stopping barrier making them unusable by the disabled.**

International buyers and non-English speakers represent a growing number of purchasers of U.S. homes, especially in multicultural markets such as New York, Texas, and Florida. Public MLS sites that present a user interface in a buyer’s language have an advantage. **Only 8% of sites currently offer multiple languages,** up from under 1% in 2009.

**Mobile**

In 2009, the category of mobile real estate sites did not exist. Today, technology companies sell more mobile phones than computers. The real estate industry has simply not caught up; it is seriously lagging behind. Less than 50% of MLSs have mobile sites. **This is a missed opportunity and a crucial area in which MLSs must rise to the challenge,** given that, according to NAR, 61% of consumers on a tablet or phone who visit a website that isn’t mobile friendly leave the site immediately and may never come back. It is a mark of how far behind the MLSs are that the mobile sites they do have are, with only one or two exceptions, first-generation adaptive sites or apps, which present the basic functions with little visual appeal. For more information on mobile websites, see Clareity’s article on the subject: [http://clareity.com/is-your-idx-real-estate-website-mobile-friendly/](http://clareity.com/is-your-idx-real-estate-website-mobile-friendly/)

**Search Engine Optimization**

PageRank™ is Google’s way of determining how important a web page is, based on the number and quality of links pointing to it from other sites. Properly “SEO optimized” web sites construct their pages so that they are more likely to be highly regarded by Google, and so are more likely to turn up in search results. Only 36% of MLS sites received a PageRank of 4 or 5 and others were even lower. This is not particularly good, considering that PageRank tops out at rating of “10.”
A site stands a much better chance of being indexed by Google if its content is constantly changing, and the best way in which that can be accomplished is by having Google index individual listings.

Only 41% of sites studied had listings indexed by Google! The benefits afforded by having all of the listings indexed and the “long tail” search should not be underestimated.

**MLS Data Security**

While consumers are the main audience of your MLS listings site, there is another hidden audience, one that you don’t want. “Scrapers” are scanning your site, copying your data, and using it or reselling it for unlicensed purposes. It is highly likely that all of the sites in this study are being actively scraped, but only 3% of sites have any defenses against scraping. Clareity has found a company, Distil Networks, that provides what we consider to be an effective and workable anti-scraping solution and has developed a solution tailored for our industry (see: [http://realestate.distilnetworks.com/](http://realestate.distilnetworks.com/)). Recognition of the seriousness and extent of the scraping problem is an important first step that our industry is still working on.

*Screen Scraping on a single MLS Website over One Month*
Conclusions

MLS public listing websites are much more functional than they were back in 2009 during Clareity’s last formal study. Still, only a minority of top 100 MLS listing websites have important features such as:

- count on the fly (or visual equivalent)
- save searches / listings
- receive email updates of listing changes
- neighborhood information
- historical and statistical information
- privacy policy
- terms of use

Many of these sites have significant work to do in order to improve ease of use and accessibility and to provide a positive user experience. The majority of these sites are not mobile-friendly and are quickly becoming irrelevant to the majority of browsing consumers. It is crucial that this be addressed with responsive or adaptive web design as soon as practical.

Addressing the screen-scraping data security issue is something that needs to be handled at the MLS level. Though anti-scraping technology is already mandated for Virtual Office Websites, it cannot be mandated for IDX websites unless the MLS is protecting its own web assets first.

Finally, search engines are still an important way for websites to be found; improving search engine optimization is imperative.

It is Clareity Consulting’s hope that MLSs use this paper to initiate internal discussion and conversations with technology partners. It should easily be possible for MLSs to improve their listing websites as platforms providing consumer exposure for subscribers and their listings, as a reliable low-cost benefit to MLS subscribers.
Company Profile

Clareity Consulting brings clients fresh insights and wide perspective gained by serving clients throughout the industry: associations and MLSs, brokerages, franchises, information and technology vendors, and others. Clareity’s services include:

**STRATEGIC AND BUSINESS PLANNING**
Clareity provides strategic, governance, and product/service business planning that bridges the gaps between strategy, tactics, and the timely activities needed to support your goals. Clareity also facilitates MLS regionalization & data shares.

**SYSTEM SELECTION**
From needs assessment and RFP to contract negotiation, for MLS, TMS, Public Records, and other offerings, Clareity's structured processes help your organization make a good business decision with stakeholder involvement.

**PUBLIC SPEAKING**
Clareity can address leadership or large groups on timely topics in an informative and fun way. Popular topics include MLS trends and system options, information security, and real estate technology trends, such as cloud computing and mobile technologies.

**COMPLIANCE AND RISK AUDITS**
Clareity provides information security, risk management and business resumption planning, staffing and salary reviews, and VOW / IDX compliance audits. Clareity brings both an independent view and finely-honed technical skills.

**PRODUCT / SERVICE / SOFTWARE REVIEW**
Clareity performs customer surveys and market research, develops product strategies and specifications, performs usability and quality assurance, audits security, and facilitates user groups. Clareity also facilitates strategic alliances, mergers, and acquisitions.

**RECRUITING**
your business is only as successful as your leaders and employees, and Clareity has discreetly helped recruit some of the brightest minds in our industry for their current positions, both executive and technical.

**WEBSITE PLANNING AND REVIEW**
Clareity helps improve website design, usability, and content, accounting for key factors such as SEO and mobile experience. Clareity also creates specifications and helps clients select the best partners to produce, and provide compelling content for, their web applications.

**EXPERT WITNESS**
Whether it’s a matter of the policies and practices of organized real estate or a more technical software dispute, Clareity can provide an expert witness with integrity and experience to conduct research, write expert opinions, and provide depositions and testimony.

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