

July 2014

Living Ratings of Digital Intelligence

Digital content and communication in Property Week's 2013 Top 40 Investment Agencies*

*By turnover, published 26 February 2014. www.propertyweek.com

Looking for a new home ranks as one of the three most stressful events we could ever experience. It is said that along with death and divorce dealing with estate agents, solicitors, banks, mortgage brokers and removal companies is fraught with stress. Few would argue. Now though, in the digital age, help is at hand from the internet.

Apps, software, websites, tablets and portable devices are helping to make the search for a perfect home a little easier.

In this edition of Living Ratings we look at how leading UK property investment agencies are utilising the opportunities offered by a growing number of digital communication channels.



The Top 10 companies

RANK	FIRM	SCORE OUT OF 70
1	Knight Frank	53
2	JLL	51
3	Strutt & Parker	49
4	Capita Symonds	46
5	Cluttons	43
6	Savills	43
7	BNP Paribas Real Estate	42
8	Cushman & Wakefield	42
9	GVA	41
10	CBRE	40

our study have gone much further to offer a wider user experience that is in many respects, outstanding.

Websites lead the way, social media catching up fast in Property Week's top 40

Our analysis of Property Week's top 40 investment agencies reveals a number of impressive examples of digital communication. As one might expect from the sector it's the 'Property Search' functionality that dominates. But that's not the whole story – the firms that lead

It's clear too that social media is on a growth trajectory with channels such as Twitter, Facebook and even Pinterest playing a key role in the property sector as firms look to optimise their business development activities.

Across all six Living Ratings categories our analysis shows growing evidence of firms' understanding about how high quality design, branded content and user experience can enhance digital corporate communications.

Leading firms head the rankings

A look at the top 10 companies in our study shows that it's the leading firms who head the rankings when it comes to digital communications. Knight Frank, JLL, Strutt & Parker, Savills, Cushman Wakefield and CBRE all deliver, digitally at least.

Ones to watch

Look lower down our rankings though and there are a few firms creating some really interesting digital communications. For example, MJ Mapp's site is one of a kind – the most eye-catching and original site we've seen for a long time. Innes England's dedicated use of Twitter for property updates is perhaps a pointer to the future. Fleurets' market intelligence is outstanding – as is their use of responsive design. BNP Paribas Real Estate's use of its "Game Changers" positioning is really powerful.



What the findings tell us

It's good to see that over half the firms in our study are seeking to differentiate themselves through either an effective digital presence, client-centric user experience, relevant branded content, unique visual branding or clear messaging.

However across all criteria, our findings indicate that there is room for improvement.



40%

of the websites we analysed are led by an 'About Us' approach, rather than a client-centric approach, to navigation and content.



15%

of the firms we rated use responsive design features in their websites.



20%

of the firms we rated offer cross-device functionality in their websites.



39%

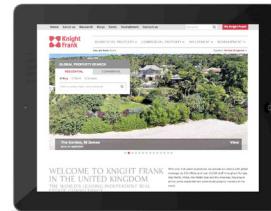
of the social media channels we analysed are led by a client-centric approach to content.



In overall scoring the quality of social media content lags behind the quality of web content.

The top five performers

Each of the five firms that lead our ratings delivers a unique and impressive digital experience that goes way beyond just property search. We've highlighted three case studies that offer useful insight into how digital brand content and social media communication can form a key part of any investment agency's corporate communications suite.



Knight Frank



JLL



Strutt & Parker



Capita Symonds



Cluttons



Three key digital challenges for property investment agencies

Challenge #1: Realising the benefits of responsive design.

Just 8 firms out of the 40 we rated utilise responsive design features in their websites.



A website with responsive web design ability adjusts to the actual device that customers are using to view a business online. The content, the text, titles and the images actually move so that they fit within the size of that specific screen, whether it's a tablet or an iPhone or an iMac or a PC desktop. Users can see the adjustments happen as the browser size shifts from one size to another. Responsive design delivers some very important business benefits:

- Multi-device adaptation
- Easy maintenance
- Improves SEO
- Higher customer conversion
- Increases mobile sales leads
- Seamless user experience

Clearly, the arguments in favour of responsive design go way beyond simple aesthetics. So why are so few using it?



Challenge #2: Clients first – it's time to walk the talk.

Like many other firms in the wider professional services sectors, many in Property Week's Top 40 talk passionately about how clients are their number one priority; "Clients come first" is a familiar refrain. Too often though, rhetoric is not matched by reality.



- Despite huge advances in both website structure and navigation 'About Us' remains the priority. Client-centric or insightful, sector-related content appears way down the agenda.
- Social media content and messaging is too often recycled third party content. There's too much focus on new hires, PR activities or awards. Where's the relevant, client-related material?

Challenge #3: Content – it's time to make it king.



All property firms are in a fight for share of mind and share of wallet among their key residential and commercial audiences. Websites, social media, microsites and blogs are fast becoming major battlegrounds. Creative, engaging and insightful content is imperative to success and has the ability to unite all the digital channels.

Company selection & rating methodology

Our company selection was defined by Property Week's 2013 Top 40 Investment Agencies by turnover, published 26 February 2014. Our research and analysis was undertaken in May and June 2014.

Living Ratings criteria

Our team analysed and scored the digital communications of Property Week's Top 40 Investment Agencies across six categories:



Web presence (7 points): Scoring the quality of a website's search, responsive design features and its device agnostic capability to work cross-platform, across desktop, tablet and mobile devices.



Social media presence (14 points): Scoring the number of channels a firm is using for social media, sharing, blogs and client apps.



Web brand content (14 points): Scoring the client-centric nature, presentation and quality of web content and its alignment with a firm's brand.



Social media brand content (10 points): Scoring the client-centric nature, presentation and quality of social media content and its alignment with a firm's brand.



Twitter frequency (5 points): The consistency of a firm's Twitter output.

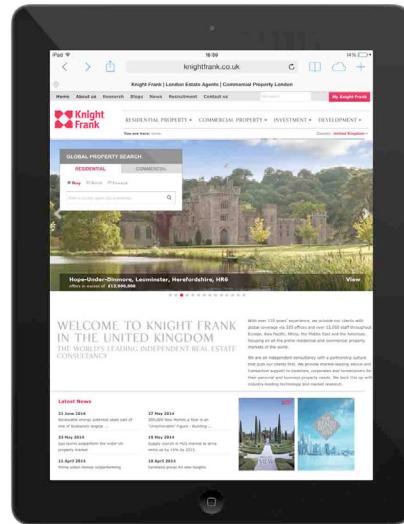


Social media influence (20 points): According to kred.com¹, "Your Kred story shows off your most influential content". Every firm or person on Twitter has a Kred score made up of Influence and Outreach. Influence goes up when somebody mentions, retweets or replies to you. Outreach increases when you mention, retweet or reply to someone else.

¹ For more information see kred.com.

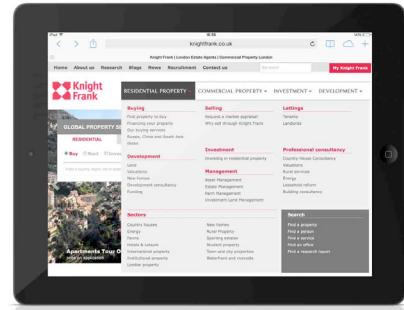
Case study **Knight Frank**

A world-class website for the world's leading independent real estate consultancy.



This is a website that delivers on the company promise: "Knight Frank provides its clients with global coverage via 335 offices and over 12,000 staff throughout Europe, Asia Pacific, Africa, the Middle East and the Americas".

At its heart it's an awesome property search website. Beyond that though it offers so much more. True to their proposition, "We are an independent consultancy with a partnership culture that puts our clients first", their website provides advice and support to investors, corporates and homeowners for their personal and business property needs. They back this up with industry-leading technology and market research. Built around client-centric navigation; "Residential", "Commercial", "Rural", "Development", and "Professional Services" links take priority over "About Us", "Offices" and "People".



visit: www.knightfrank.co.uk



Living Ratings

#1

Social media highlights

LinkedIn: Knight Frank's LinkedIn pages are all about "Bringing the world to you". From the impactful banner header that promotes the Knight Frank property app that "instantly displays the best properties from around the world", to a beautifully presented report showcasing Knight Frank's services to international investors, this site shows how a firm can extend its reach with a coordinated social media presence.

YouTube: "In a city that never sleeps and is constantly changing, it's hard to say what it will be like in 6 months, never mind 6 years". Today, with Knight Frank TV you don't have to imagine as the firm uses video to set out its 2020 vision for the central London office market.

Twitter: Knight Frank say that their Twitter page is "used to communicate our latest news, research reports and views". Followers get "Thoughts on #coolingmeasures in #China among a host of topics. Interested in gentrification in Shepherds Bush in London? Start following Knight Frank.

Facebook: The primary role of the official Knight Frank fan page is to feature images of stunning properties. To coincide with Royal Ascot week it "showcases some of the finest properties from the area".

Pinterest: Pin-perfect. For those who remain unconvinced about the merits of a digital pin board in the corporate world, take a look. Users can browse through pin after pin of amazing photos. From swimming pools to international properties and wonderful London homes or a wealth report, this is a social site to drool over.

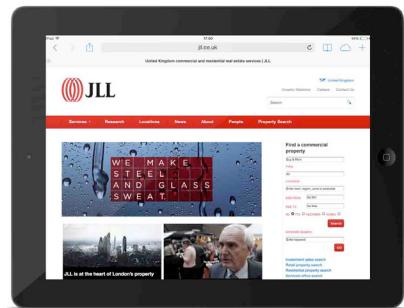
RSS: It's outstanding and features a plethora of research and insight on a range of topics from the renewable energy sector to the "Live cat bounce", all with live links to Twitter.

Instagram: "Loving high quality residential and commercial property since 1896. Sharing the love on Instagram since 2012". It's a site that maximizes the power of Instagram to display some stunning property images from across the globe. Hard to leave behind.

Case study

JLL

Digital thinking “outside the office block.”



Recently rebranded, Jones Lang LaSalle has a new name, JLL. Interestingly it has a unique new positioning too; “JLL is a financial and professional services firm specialising in real estate services and investment management.”

As part of this desire to move beyond the estate agency stereotype and be seen as a professional services firm it has created a superb website. Outstanding navigation, gritty look and feel and comprehensive content combine to deliver a perfect stream of knowledge, insight and inspiration. First and foremost it's a services-led site. The home page and mega “Services” dropdown combine to provide unrivalled access to numerous services for developers and occupiers in every sector.

It's a research portal too. Sitting second in the main navigation, the “Research” tab links the user to a wealth of thought leadership, seminar programmes, blogs and research articles; “The London Luxury Quarter”, Real Estate at the Heart of Sustainable Business”, “Understanding Digital London”. This is a website driven by user needs. And when they talk “About Us” they acknowledge their primary role is to provide market insight and foresight, sound research and relevant market knowledge.

visit: www.jll.co.uk

Living Ratings

#2

Social media highlights

LinkedIn: Where do Asia's wealthiest HNW investors look when buying real estate? JLL's up to date LinkedIn pages provide the answers to this and other key industry issues, supported by engaging graphics and video content. A YouTube video featuring highlights from the “Global Real Estate Transparency Index 2014” and analysis of the “London Luxury Quarter” form part of a well coordinated and curated social media campaign.

YouTube: JLL's dedicated YouTube channel puts a wealth of high quality video content at the user's fingertips. Framed within imagery from JLL's new visual identity, featured videos include a host of global “Market Pulse” research plus a super feature about their new brand.

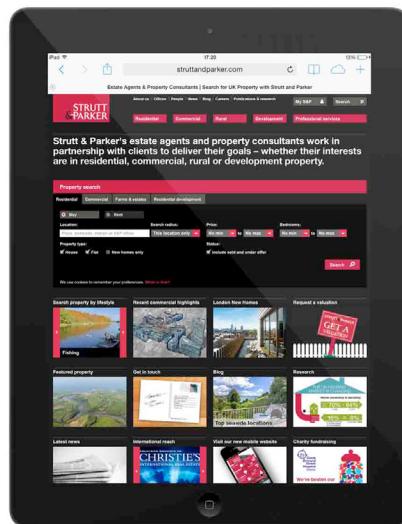
Twitter: @JLLUK streams links to branded market insight and research direct to its followers who benefit from a regular supply of insight and inspiration. It's refreshingly different from the majority of self-centred and recycled tweets that dominate the sector.

Facebook: JLL's Facebook page avoids the temptation to simply duplicate content from Twitter and YouTube. Topical feature articles on its timeline include “World Cup lessons for business” and “Forget the workplace ...for now”.

Pinterest: Although it isn't linked from the website home page we loved JLL LA's Pinterest pages. Anyone looking for pointers on how Pinterest can support a corporate communications programme need look no further. Images, info-graphics and announcements combine in a glorious pin board of colour, inspiration and engagement.

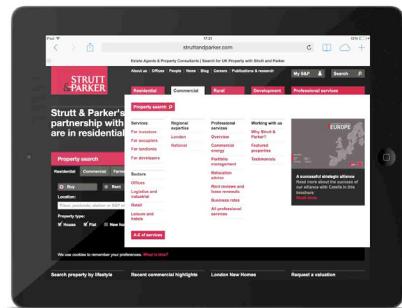
Blog: JLL are one of the few firms we rated who truly understand how to combine social media with web communication. Check out <http://www.jllblog.com> to see how.

Case study **Strutt & Parker** “Opinion, advice and fresh thinking...”



This is a website that's low on text and high on engagement and access. Strutt & Parker really do walk the talk... “Through this partnership, you'll have access to the resources of a national firm as well as the valuable knowledge of a local specialist”. And wow, do they provide access.

In what could be described as a template for the perfect user experience, comprehensive property search functionality is supported by multi-point access to 16 individual points of interest including research, valuations, blogs, research and news. Using Strutt & Parker's impactful visual identity and typography a massive amount of meaningful content is carefully planned and presented. Imagery and info-graphics combine to engage and inform the user about the very latest developments in the property sector.



visit: www.struttandparker.com

Living Ratings #3

Social media highlights

LinkedIn: Leading with Strutt & Parker's stand out black, red and white visual identity, their LinkedIn pages cover a range of relevant issues. Its primary focus is on recruitment and quarterly updates; it does the simple thing but it does it well.

YouTube: Check out Strutt & Parker's dedicated YouTube channel and you'll see just how well the visual identity works in a digital setting such as this. It really catches the eye and provides the perfect introduction to a library of good video content.

Twitter: More topical tweets from @struttandparker with “Homes to get you ready for #Wimbledon2014”. One tweet has links to a photo lightbox – who's for a spot of tennis? There's a slideshow too – a home with a tennis court anyone?

Facebook: It's interesting to see how Strutt & Parker have adapted the corporate identity for their Facebook pages. The timeline updates are full of colour, relevant links and posts, using images, info-graphics and commentary.

Pinterest: This is lovely. Nearly a thousand pins on 22 boards with titles like “Light my fire,” Homes we'd leave the UK for”, and “Oh! We do like to be beside the seaside”. They've gained 324 likes. Sorry, make that 325.

Blog: These blog pages are where the promise of “Opinion, advice and fresh thinking from Strutt & Parker's experts” is delivered. Well written, well designed and well presented the blog page is a library of insight and opinion. Each piece is accompanied by a photo of the author. This gives the blog section a personal touch that is often promised but rarely delivered in many websites.

Total criteria overall

Scoring performance across user experience, web content, social media presence, social media content, Twitter frequency and social media influence & outreach.

RANK	FIRM	SCORE out of 70	RANK	FIRM	SCORE out of 70
1	<i>Knight Frank</i>	53	20	<i>Carter Jonas</i>	25
2	<i>JLL</i>	51	22	<i>Sanderson Weatherall</i>	23
3	<i>Strutt & Parker</i>	49	22	<i>Eddisons</i>	23
4	<i>Capita Symonds</i>	46	24	<i>GL Hearn</i>	22
5	<i>Cluttons</i>	43	25	<i>Rapleys</i>	21
5	<i>Savills</i>	42	25	<i>Dacre Son & Hartley</i>	21
7	<i>BNP Paribas Real Estate</i>	42	25	<i>Caxtons</i>	21
7	<i>Cushman & Wakefield</i>	42	28	<i>CVS</i>	18
9	<i>GVA</i>	41	29	<i>Ryden</i>	17
10	<i>CBRE</i>	40	30	<i>Hartnell Taylor Cook</i>	16
10	<i>Colliers International</i>	40	30	<i>Beauchamp Estates (Mayfair)</i>	16
10	<i>Fleurlets</i>	40	32	<i>Mason Owen</i>	15
13	<i>Bidwells</i>	39	33	<i>Montagu Evans</i>	14
14	<i>Deloitte Real Estate</i>	37	34	<i>Mason Partners</i>	13
15	<i>MJ Mapp</i>	33	34	<i>Aitchison Rafferty</i>	13
16	<i>Innes England</i>	31	36	<i>Matthews & Goodman</i>	8
17	<i>Strettons</i>	30	36	<i>Edward Symmons</i>	8
18	<i>Speirs Gumley</i>	29	38	<i>Gerald Eve</i>	7
19	<i>Allsop</i>	27	39	<i>Goadsby</i>	2
20	<i>Lambert Smith Hampton</i>	25	40	<i>Briant Champion Long</i>	0

User experience & digital content

User experience (UX): Scoring the quality of a website's search, responsive design features and device agnostic capability to work cross-platform across desktop, tablet and mobile devices.

Digital content: Scoring the client-centric nature, presentation and quality of web content and its alignment with a firm's brand.

RANK	FIRM	CONTENT OUT OF 14	OUT OF 7	TOTAL OUT OF 21	RANK	FIRM	CONTENT OUT OF 14	UX OUT OF 7	TOTAL OUT OF 21
1	JLL	12	4	16	21	Eddisons	4	4	8
1	Strutt & Parker	12	4	16	22	Speirs Gumley	6	1	7
3	MJ Mapp	13	2	16	22	CVS	6	1	7
3	Bidwells	11	4	15	24	Beauchamp Estates (Mayfair)	5	1	6
3	Cluttons	10	5	15	24	Lambert Smith Hampton	4	2	6
6	Capita Symonds	12	2	14	24	GL Hearn	4	2	6
6	Colliers International	12	2	14	27	Rapleys	3	2	5
6	Cushman & Wakefield	8	6	14	27	Hartnell Taylor Cook	3	2	5
6	Fleurets	8	6	14	27	Matthews & Goodman	3	2	5
10	Knight Frank	11	2	13	27	Edward Symmons	3	2	5
10	Savills	11	2	13	31	Caxtons	3	1	4
10	Carter Jonas	8	5	13	31	Allsop	3	1	4
10	Deloitte Real Estate	7	6	13	31	Dacre Son & Hartley	2	2	4
10	Innes England	7	6	13	31	Gerald Eve	2	2	4
15	Montagu Evans	10	2	12	35	Mason Owen	2	1	3
16	BNP Paribas Real Estate	10	1	11	35	Sanderson Weatherall	1	2	3
16	CBRE	9	2	11	35	Ryden	1	2	3
18	Strettons	9	1	10	38	Aitchison Raffety	1	1	2
18	GVA	8	2	10	38	Goadsby	1	1	2
20	Mason Partners	7	2	9	40	Briant Champion Long	0	0	0

Social media branded content & presence

Content: Scoring the client-centric nature, presentation and quality of social media content and its alignment with a firm's brand.

Presence: Scoring the number of channels a firm is using for social media, sharing, blogs and client apps.

RANK	FIRM	CONTENT OUT OF 10	PRESENCE OUT OF 14	TOTAL OUT OF 24	RANK	FIRM	CONTENT OUT OF 10	PRESENCE OUT OF 14	TOTAL OUT OF 24
1	<i>Knight Frank</i>	8	12	20	20	<i>Sanderson Weatherall</i>	3	3	6
2	<i>JLL</i>	9	9	18	22	<i>Dacre Son & Hartley</i>	2	3	5
3	<i>Strutt & Parker</i>	9	7	16	22	<i>GL Hearn</i>	1	4	5
4	<i>Capita Symonds</i>	9	6	15	24	<i>Caxtons</i>	2	2	4
4	<i>BNP Paribas Real Estate</i>	9	6	15	24	<i>Rapleys</i>	1	3	4
6	<i>GVA</i>	9	5	14	24	<i>Ryden</i>	1	3	4
7	<i>Cluttons</i>	7	6	13	24	<i>Hartnell Taylor Cook</i>	1	3	4
7	<i>CBRE</i>	5	8	13	24	<i>Mason Owen</i>	1	3	4
9	<i>Fleurets</i>	8	4	12	29	<i>Innes England</i>	2	1	3
9	<i>Savills</i>	7	5	12	29	<i>Matthews & Goodman</i>	1	2	3
9	<i>Deloitte Real Estate</i>	5	7	12	29	<i>Eddisons</i>	0	3	3
12	<i>Cushman & Wakefield</i>	5	6	11	32	<i>Aitchison Raffety</i>	1	1	2
13	<i>MJ Mapp</i>	9	1	10	32	<i>Montagu Evans</i>	0	2	2
13	<i>Speirs Gumley</i>	6	4	10	32	<i>Gerald Eve</i>	0	2	2
13	<i>Colliers International</i>	2	8	10	35	<i>Carter Jonas</i>	0	1	1
16	<i>Bidwells</i>	5	4	9	35	<i>CVS</i>	0	1	1
17	<i>Strettons</i>	5	3	8	37	<i>Mason Partners</i>	0	0	0
17	<i>Beauchamp Estates (Mayfair)</i>	4	4	8	37	<i>Edward Symmons</i>	0	0	0
19	<i>Lambert Smith Hampton</i>	2	5	7	37	<i>Goadsby</i>	0	0	0
19	<i>Allsop</i>	1	6	7	37	<i>Briant Champion Long</i>	0	0	0

Twitter frequency

Scoring the frequency and consistency of a firm's Twitter output.

RANK	FIRM	SCORE OUT OF 5	RANK	FIRM	SCORE OUT OF 5
1	Knight Frank	5	21	Strettons	1
1	Capita Symonds	5	21	Lambert Smith Hampton	1
1	Savills	5	21	GL Hearn	1
1	GVA	5	21	Rapleys	1
5	JLL	4	21	Ryden	1
5	Strutt & Parker	4	21	Hartnell Taylor Cook	1
5	Cushman & Wakefield	4	21	Mason Owen	1
5	CBRE	4	21	Aitchison Raffety	1
5	Colliers International	4	29	Deloitte Real Estate	0
5	Fleurets	4	29	Carter Jonas	0
11	Cluttons	3	29	Eddisons	0
11	BNP Paribas Real Estate	3	29	CVS	0
11	Bidwells	3	29	Beauchamp Estates (Mayfair)	0
11	MJ Mapp	3	29	Montagu Evans	0
11	Innes England	3	29	Mason Partners	0
11	Speirs Gunley	3	29	Matthews & Goodman	0
11	Allsop	3	29	Edward Symmons	0
11	Sanderson Weatherall	3	29	Gerald Eve	0
11	Dacre Son & Hartley	3	29	Goadsby	0
11	Caxtons	3	29	Briant Champion Long	0

Social media influence & outreach

Scoring social media influence on Kred.com. Every firm or person on Twitter has a Kred score made up of two parts; influence and outreach. Influence goes up when somebody mentions, retweets or replies to you. Outreach increases when you mention, retweet or reply to someone else.

RANK	FIRM	SCORE OUT OF 20	RANK	FIRM	SCORE OUT OF 20
1	Knight Frank	14.99	21	Carter Jonas	10.85
2	JLL	13.43	22	GL Hearn	10.17
3	Strutt & Parker	13.35	23	CVS	10.07
4	BNP Paribas Real Estate	13.2	24	Fleurets	9.84
5	Savills	12.86	25	Caxtons	9.52
6	Cushman & Wakefield	12.76	26	Speirs Gunley	9.47
7	CBRE	12.35	27	Ryden	9.04
8	Deloitte Real Estate	12.35	28	Dacre Son & Hartley	9.01
9	GVA	12.26	29	Aitchison Raffety	7.69
10	Cluttons	12.21	30	Mason Owen	7.15
11	Capita Symonds	12.15	31	Hartnell Taylor Cook	6.1
12	Colliers International	12.08	32	MJ Mapp	5.25
13	Bidwells	12.03	33	Mason Partners	4.4
14	Innes England	11.77	34	Edward Symmons	2.78
15	Allsop	11.61	35	Beauchamp Estates (Mayfair)	1.61
16	Eddisons	11.57	36	Gerald Eve	0.56
17	Strettons	11.35	37	Montagu Evans	0
18	Sanderson Weatherall	11.27	38	Matthews & Goodman	0
19	Rapleys	11.21	39	Goadsby	0
20	Lambert Smith Hampton	11.06	40	Briant Champion Long	0

About Living Ratings

Living Ratings delivers evidence-based insight that enhances our understanding of our specialist sectors. These have included:

- Digital content and social media communication in the Am Law 100
- Social media and brand content in APAC law firms
- Living Ratings of social media and brand content in professional services
- Sustainability communication in the UK financial services

Living Group specialises in integrated branding and communications

We help clients in the financial, professional services, property and technology sectors to enhance their corporate brands, communications and reputations.

Our team integrates industry expertise and insight with award-winning creativity, cutting-edge technology and outstanding client service. The outcome is brand, design, digital, marketing and communications that are engaging, relevant and get results.

Connect with us about planning or enhancing your social media communication.

To talk with our team about any of the issues in this study or organise a meeting to discuss how you could benefit from developing a digital brand or content strategy:



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