

Real Estate Analysis

A snapshot of real estate sales performance, property trends, and client behavior. It helps in understanding key metrics such as total clients, properties, visits, sales, pricing, and conversion rate. Additionally, it offers historical trends and forecasts for sales, along with breakdowns by location and property type.

Top Metrics

Metric	Value	Insight
Total Clients	1,500	Good client base; useful for calculating engagement and conversion.
Total Property	1,000	Indicates the number of listed properties.
Total Visits	5,000	Shows user interests
Total Sales	\$1.539B	Strong total sales performance.
Avg Property Price	\$521K	Helps benchmark individual property values.
Conversion Rate	73%	Very strong—indicates good marketing and property appeal.

Sales Trending

- ✓ Past sales are stable with slight fluctuations, but there's a dip in early 2025
- ✓ The forecast shows an expected rise with a margin of uncertainty.

Sales per Location

Top 3 Locations:

- **New York:** \$335M
- **Miami:** \$330M
- **Los Angeles:** \$298M

Insight: These cities are the primary revenue drivers. New York and Miami are almost equal in sales, indicating similar market performance.

Sales per Property

Top Types:

- **Apartments:** \$375M
- **Villas:** \$326M

Insight: Apartments generate the most revenue, possibly due to volume or demand in urban areas. Warehouses and office properties have the lowest sales, which may suggest low demand or high vacancies.

Agent Performance

Top KPI Metrics:

Metric	Value	Insight
No. of Agents	100	Shows a large and diverse sales force. Good distribution likely across multiple locations and property types.
Avg Agent Sales	\$15.39M	Indicates strong individual contribution and supports the high overall sales (\$1.539B) .
Top Agent	Samantha Vargas	Leading with \$24.22M in sales and 27 sold properties.

Price Status

Illustrates the price difference between the listed price and the actual selling price of properties — highlighting the agent’s ability to negotiate a higher deal. It shows the profit margin achieved by agents, representing how much above (or below) the listed price each property was sold.

- ✓ **Above Listed Price:** 66.1%
- ✓ **Below Listed Price:** 33.9%

Top 10 Agents Breakdown:

Agent	Sales Price	Actual Price	Price Diff	Clients	Sold Properties
Samantha Vargas	\$24.22M	\$16.65M	\$7.57M ↓	28	27
Francisco Williams	\$24.18M	\$13.48M	\$10.69M ↓	29	29
Gordon Wilson	\$23.28M	\$12.98M	\$10.31M ↓	28	28
Robert Miller	\$21.44M	\$7.81M	\$13.63M ↓	23	23
Mark Lopez	\$20.99M	\$9.25M	\$11.73M ↑	24	24

Client Analysis

Top KPIs:

- **Total Clients:** 1500
- **Active Clients:** 1096 (~73% of total clients are currently active, which is a healthy engagement level).
- **Total Visits:** 5000
 - This shows strong engagement, averaging over 4 visits per client.

Clients Type:

- **Repeat Clients:** 52.01%
- **First-time Clients:** 47.99%

Insight:

More than half of the clients are returning, which suggests strong customer satisfaction and long-term relationships.


Top 10 Clients Table:

Laura Allen generated the **highest sales (\$7.03M)** and **highest profit (\$3.52M)** with 13 visits.

Kimberly Bowen is one of the top 10 although it has negative **profit (-\$0.22M)**, suggesting either a mispricing or a strategic discount.

Properties Overview

Key Stats Summary

- **Total Properties:** 1,000
- **Sold Properties:** 863 ( **86.3% sold rate**)
- **Average Property Size:** 266.8 sqm
- **Average Price per sqm:** \$1,950

Location per Type analysis

New York

- **Price per sqm:** \$1,930
- **Most Sold:** Apartment (23.24%)

Why Apartments?

- **High population density** and limited land space make vertical housing (apartments) the most practical.
- Many professionals and international buyers prefer **smaller, investment-friendly units**.

Miami

- **Lowest price per sqm:** \$1,900
- **Most Sold:** Retail (28.85%)

Why Retail?

- Miami is a **tourism and shopping hub** with massive foot traffic from locals and tourists.
- Heavy commercial zones, especially in places like **Brickell, Wynwood, and South Beach**, drive demand for retail spaces.
- The **Latin American market connection** makes Miami a hotspot for international retail brands.

Los Angeles

- **Balanced average sqm price:** \$1,960
- **Most Sold:** Apartment (25.92%)

Why Apartments?

- LA has **soaring real estate prices**, making apartments more affordable for both buyers and renters.
- Apartments cater to a wide demographic — students, young professionals, and newcomers.



Chicago

- **Highest price per sqm: \$2,040**
- **Most Sold: Villa (22.46%)**

Why Villas?

- Chicago offers **more land and lower property prices** compared to coastal cities, enabling larger homes.
 - Many middle-to-upper class residents prefer **spacious villas** in suburbs like Naperville or Evanston.
 - Strong demand from **families** looking for multi-bedroom, detached homes with outdoor space.
 - **Low-rise housing** is common, making villas more accessible.
- NB: Chicago is most visited and top-selling location.



Houston – Most Sold: Warehouse (22.83%)

Why Warehouses?

- Houston is a **logistics and industrial powerhouse**, home to one of the largest ports in the U.S.
- Strong presence of **oil & gas, manufacturing, and shipping industries** increases warehouse demand.
- The rise of **e-commerce** fuels high demand for storage and fulfillment centers



Final Thought:

These trends reflect each city's **economic structure, demographics, and urban planning**. This property segmentation can help you:

- Tailor marketing by city.
- Align agent specializes in regional trends.
- Optimize inventory allocation by predicting demand.



Performance by Property Size

First we've categorized properties by size using the following criteria for Size_sqm

Categorization Details

- **Small:** Properties up to 90 sqm.
- **Medium:** Properties from 91 sqm to 150 sqm.
- **Large:** Properties from 151 sqm to 250 sqm.

- **Very Large:** Properties over 250 sqm.

Size Category Sales Count	
Very Large	1,044
Large	487
Medium	282
Small	187

- **Very Large properties** dominate sales – likely due to high commercial or investment demand in Miami and Houston.
- **Medium-sized Apartments** still perform well in urban areas like Chicago and Los Anglos.

Top 10 Most Visited Properties

- **Locations:** Mostly in Chicago and Miami
- **Top Types:** Apartments, Retail, Offices, and Warehouses
- **Observation:** Properties priced between **\$180K–\$700K** get the highest attention, especially **medium to very large** sizes.

Conclusion and Recommendation

1. Market & Product Focus

- **Urban Apartments:** Prioritize high-demand cities (NY, LA, Chicago, Miami) for apartments/villas.
- **Large Properties:** Expand investment in top-selling categories (e.g., luxury villas, mega-apartments).
- **Warehouses:** Leverage Houston’s logistics boom; target commercial clients needing storage.
- **Low-Performing Segments:** Re-evaluate offices/warehouses—revamp offerings or phase them out.

2. Pricing & Profitability

- **Price Discipline:**
 - Enforce **minimum sale prices** (e.g., 90% of market value) to prevent underpricing.
 - Investigate agents with large price gaps (e.g., Kimberly Bowen) to avoid loss-making deals.
- **Negative Profit Cases:** Audit transactions with significant deviations to identify root causes.

3. Client Management

- **Repeat Clients (52% Segment):**
 - Launch **loyalty programs** (tiered rewards, VIP services, referral incentives).
 - Offer **non-price perks** (free staging, premium listings) to retain price-sensitive clients.
- **High-Value Clients:** Assign top agents to nurture relationships and upsell.

4. Agent Performance

- **Top Performers** (e.g., Samantha Vargas, Mark Lopez):
 - **Reward & Replicate:** Study their techniques; expand their roles or mentor others.
 - **Align with Expertise:** Assign agents to cities/property types they excel in (e.g., warehouse specialists to Houston).
- **Mid-Tier Agents:**
 - Provide **targeted training** (negotiation, client insights) shadowing top agents.
 - Implement **performance benchmarks** tied to incentives.

5. Operational Efficiency

- **Declining Sales/Visits:**
 - Investigate causes (market shifts? seasonality? operational gaps?).
 - Boost **marketing** (geo-targeted campaigns) and **client follow-ups**.
- **Forecasting:** Adjust budgets/projections if low sales persist.

6. Marketing & Outreach

- **Segmented Campaigns:**
 - Apartments in NY/LA; retail/warehouses in Miami/Houston.
 - Highlight **unique selling points** (e.g., "Maximize value, not just speed").
- **Transparency:** Publish quarterly **market reports** to justify pricing.

Implementation Priority

1. **Immediate:** Enforce price floors + audit negative-profit cases.
2. **Short-Term (1-3 Months):** Launch loyalty programs + agent training.
3. **Ongoing:** Monitor market trends and adjust allocations quarterly.

Goal: Balance **profit protection** (price controls) with **growth** (client/agent incentives) while staying agile to market shifts.

