STRATFIELD MONITOR 2026 · REAL ESTATE AGENTS

How digital Germany's real estate agents truly are

The Stratfield Real Estate Monitor 2026 assessed the digital maturity of more than 150 real estate agencies across Germany. The assessment rests on 15 criteria in four dimensions, from discoverability to customer retention. The result: almost all are visible, very few are built to close.

AS OF 27 OCTOBER 2026 · 158 REAL ESTATE AGENCIES · 15 CRITERIA IN FOUR DIMENSIONS

KEY TAKEAWAYS

REAL ESTATE AGENTS ARE LAGGING BEHIND DIGITALLY
None of the 158 agencies examined meets all 15 criteria of digital excellence. The average agency scores just six out of a possible 15 points. Even the front-runner reaches only twelve.

VISIBLE, BUT NOT BUILT TO CLOSE
While 98% of agencies present their services online and 81% maintain a well-kept Google Business Profile, most lack dedicated location pages, and only 39% offer genuine online appointment booking.

SELLER ACQUISITION REMAINS LARGELY ANALOGUE
Only 29% of agencies offer a digital property valuation, and just 6% provide a multi-step online enquiry form for owners looking to sell. When it comes to winning new listings, enormous digital potential simply goes unused.

CRM IS A FOREIGN CONCEPT FOR MANY AGENTS
Only 5% of agencies offer a newsletter sign-up, 18% a personalised search alert and 25% a favourites list. Just two of the 158 agencies meet all three criteria. Most are passing up the chance to build lasting relationships with prospective clients.

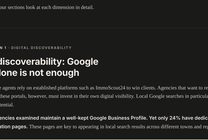
01 · OVERVIEW · RANKING

The winners: who leads on digital

None of the 158 real estate agencies examined meets all 15 criteria of digital excellence. Even the digital leaders have room to improve. When it comes to digitising customer acquisition, engagement and retention, real estate agencies still have considerable ground to make up.

Rheinside Real Estate tops the ranking with twelve out of a possible 15 points, followed by Stalter Immobilien with 11.5 points and KAMPMEYER Immobilien and Houses & Homes with eleven points each. Even the digital front-runners, then, are not yet realising their full potential.

TOP OF THE RANKING · PLACES 1 TO 5 · POINTS OUT OF 15



Bar length is relative to 15 points; the gap to the right-hand edge shows the remaining potential.

For the ranking, all agencies were assessed against the same 15 criteria. These fall into four dimensions that follow a prospective client's journey, from first contact to return visit: digital discoverability, property and service offering, conversion and lead generation, and customer retention and personalisation. Fully met criteria score one point, partially met criteria half a point.

The following four sections look at each dimension in detail.

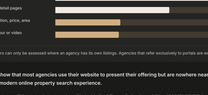
02 · DIMENSION 1 · DIGITAL DISCOVERABILITY

Digital discoverability: Google Maps alone is not enough

Many real estate agents rely on established platforms such as ImmoScout24 to win clients. Agencies that want to reduce their dependence on these portals, however, must invest in their own digital visibility. Local Google searches in particular hold considerable potential.

81% of the agencies examined maintain a well-kept Google Business Profile. Yet only 24% have dedicated, locally optimised location pages. These pages are key to appearing in local search results across different towns and regions.

DIGITAL DISCOVERABILITY · SHARE OF AGENCIES MEETING EACH CRITERION



For the Google profile, a further 35% count as partially met, typically a listing without current photos or reviews. For location pages, a further 35% count as partially met, usually a single page covering several locations.

An agency with several offices should give each location its own landing page presenting local listings, local contacts and relevant services. Instead, many branches direct their locations onto a single page or mention them only in a location overview. In doing so, they forgo the chance to win new prospects and property owners through Google.

26 agencies fully meet both criteria, among them Rheinside Real Estate, KAMPMEYER Immobilien, Houses & Homes, Peter Busch Immobilien, Suparo Immobilien and Immobilien Killkus.

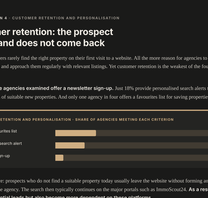
03 · DIMENSION 2 · DIGITAL PROPERTY AND SERVICE OFFERING

Digital service offering: the services are in place, the user experience lags behind

Almost all of the agencies examined (98%) present their services on their own website, from property sales and valuations to lettings. When it comes to the digital user experience, however, quality drops off markedly.

70% of agencies feature property listings with dedicated detail pages on their own websites. Yet only 40% let prospective buyers filter listings by criteria such as location, price or floor area. Digital property presentation also has ground to make up: just 39% of agencies with listing pages use virtual 360-degree tours or property videos.

PROPERTY AND SERVICE OFFERING · SHARE OF AGENCIES MEETING EACH CRITERION



Filters and tours can only be assessed where an agency has its own listings. Agencies that refer exclusively to portals are excluded here.

The findings show that most agencies use their website to present their offering but are nowhere near exploiting the potential of a modern online property search.

17 agencies fully meet all four criteria, among them Rheinside Real Estate, Stalter Immobilien, KAMPMEYER Immobilien, Wünsterot Immobilien, DKR Grund, AKZYPTA Immobilien and Tuscher Immobilien.

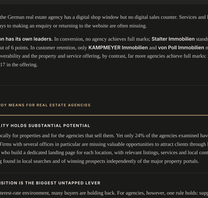
04 · DIMENSION 3 · CONVERSION AND LEAD GENERATION

Conversion & lead generation: agencies are missing out on valuable leads

Although winning new clients is critical for real estate agencies, many fail to make use of the digital tools available for contact and lead generation.

74% of agencies allow direct enquiries on individual listings. Yet only 39% offer genuine online appointment booking. More surprising still: just 12% can be reached via WhatsApp, even though this additional channel can be integrated with minimal technical effort. Customer reviews, too, are displayed on the website by fewer than half of all agencies.

CONVERSION AND LEAD GENERATION · SHARE OF AGENCIES MEETING EACH CRITERION



Direct enquiry on the listing page could only be assessed where a property details page was captured. For appointment booking, a further 48% count as partially met: a contact route exists, but no choice of available time slots.

The greatest untapped potential lies in winning new listings. In a market where buyers are holding back, securing attractive properties to sell is decisive. Without supply there is no demand. Yet only 29% of agencies offer a digital property valuation, and a multi-step online enquiry form through which owners can put their property forward for sale is found at just 6%.

No agency achieves full marks in this dimension. Stalter Immobilien leads with 5.5 out of 6 points, followed by Rheinside Real Estate, Houses & Homes and Kaffermeier & Sulge Immobilien with 5 points each.

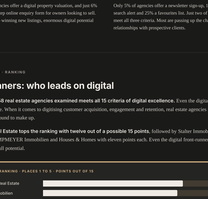
05 · DIMENSION 4 · CUSTOMER RETENTION AND PERSONALISATION

Customer retention: the prospect leaves and does not come back

Prospective buyers rarely find the right property on their first visit to a website. All the more reason for agencies to stay in touch with potential clients and approach them regularly with relevant listings. Yet customer retention is the weakest of the four dimensions assessed.

Only 5% of the agencies examined offer a newsletter sign-up. Just 18% provide personalised search alerts that automatically notify prospects of suitable new properties. And only a quarter in four offers a favourites list for saving properties of interest.

CUSTOMER RETENTION AND PERSONALISATION · SHARE OF AGENCIES MEETING EACH CRITERION



The consequence: prospects who do not find a suitable property today usually leave the website without forming any lasting connection to the agency. The search then typically continues on the major portals such as ImmoScout24. **As a result, agencies not only lose potential leads but also become more dependent on these platforms.**

Improving retention does not always require major investment. Newsletters, search alerts and favourites lists can be set up with many standard real estate software packages. What matters is treating the long-term client relationship as an integral part of the digital strategy.

Only two agencies fully meet all three criteria: KAMPMEYER Immobilien and von Poll Immobilien.

06 · OVERVIEW · MATURITY

Few leaders, most in the middle

No agency achieves full marks; the best score is twelve out of 15. Even the leading group with more than nine points comprises just **17** of the 158 agencies. Most score well below the leaders: the typical agency reaches **6 out of 15**, and more than half score six points or fewer.

DISTRIBUTION OF AGENCIES BY SCORE · 158 AGENCIES · MAXIMUM 15 POINTS

The closer to the deal, the thinner it gets

The four dimensions reflect the journey of a prospective client: finding an agency, exploring its properties and services, making an enquiry or booking an appointment, and staying in touch if no suitable property is available. Across all 158 agencies, the results show where digital support is strongest and where it falls short. Agencies perform best at presenting their properties and services, followed by online visibility. Performance drops sharply when it comes to encouraging visitors to take action and maintaining contact over time.

AVERAGE CRITERION FULFILMENT BY DIMENSION

Average across each dimension's criteria, based on the agencies for whom the criterion could be assessed.

In other words: the German real estate agency has a digital shop window but no digital sales counter. Services and listings are visible, but clear pathways to making an enquiry or returning to the website are often missing.

Each dimension has its own leaders. In conversion, no agency achieves full marks: **Stalter Immobilien** stands alone in first place with 5.5 out of 6 points. In customer retention, only **KAMPMEYER Immobilien** and **von Poll Immobilien** meet all three criteria. In discoverability and property and service offering, by contrast, far more agencies achieve full marks: 26 in discoverability, 17 in the offering.

WHAT THE STUDY MEANS FOR REAL ESTATE AGENCIES

LOCAL VISIBILITY HOLDS SUBSTANTIAL POTENTIAL
People search locally for properties and for the agencies that sell them. Of the 158 agencies examined have optimised location pages. Firms with several offices in particular are missing valuable opportunities to attract clients through local Google searches. Dedicated, locally optimised landing pages for each location, with relevant listings, services and local contacts, improve their chances of being found in local searches and of winning prospects independently of the major property portals.

SELLER ACQUISITION IS THE BIGGEST UNTAPPED LEVER
In the current interest-rate environment, many buyers are holding back. For agencies, however, one rule holds: supply drives demand. Those who win attractive listings also create new opportunities to reach buyers. Agencies that are early to offer a digital property valuation and a multi-step online enquiry form for owners in their regions can reach owners who have not yet seriously considered selling, and in doing so win new buyers as well.

CUSTOMER RETENTION GENERATES REVENUE, EVEN IN DIFFICULT TIMES
For many people, buying a property is the largest investment of their lives, and the decision-making process often takes considerable time. That makes it all the more important for agencies to retain prospects over the long term and approach them regularly with relevant listings. Personalised search alerts, favourites lists and newsletters help agencies stay in touch with prospective buyers over several months. Those who invest here improve their chances of turning prospects into actual buyers, and of generating additional revenue even in a difficult market.

STRATFIELD VERDICT

The websites of German real estate agencies are often digital shop windows, but rarely genuine sales channels. Most present their services and listings online, yet fall well short of exploiting their websites' potential for winning and retaining clients.

The decisive question is no longer whether an agent has a digital presence, but whether the website does its job: winning new prospects and property owners, generating enquiries and building lasting client relationships. This is where the industry's greatest untapped potential lies.

METHODOLOGY

The study is based on 158 real estate agencies from across Germany. They were selected from a systematic candidate list built on OpenStreetMap and current determination of owner-managed agencies with their own website, supplemented by three larger, multi-regional providers for comparison. Agencies without a functioning website or with a mere placeholder page were not rated.

For each agency, the home page, main navigation, service and sales pages and, where available, property listing pages and individual property details pages were captured in full in the browser, including lazy-loaded content. The Google Business Profile was checked via Google Maps search. Each website was then assessed against a uniform catalogue of 15 criteria, with each criterion rated as met, partially met, not met or not assessable. Not assessable means the relevant page could not be captured, for instance because an agency carries no listings of its own.

For the ranking, a met criterion scores one point and a partially met criterion half a point. Criteria that could not be assessed receive zero points, since they are equally ineffective for the website visitor; the maximum possible score remains 15. The shares per criterion in sections 02 to 05 refer only to agencies for whom that criterion could be assessed, so the assessment base varies by criterion and is shown beneath each bar. Data was collected in October 2026.

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