What can Zillow do to offset slowing revenue growth?

My analysis on realtor.com earlier this week surfaced a particularly interesting chart on Zillow's revenue growth. The slowing growth piqued my interest, so I dug deeper into the data and strategic implications. Zillow has been growing fast over the past few years. The company topped $1 billion in annual revenue for the first time in 2017. But the gravy train can't last forever. How big can Zillow really get? In its FY17 annual report, Zillow had this to say about its future growth prospects: "We see significant opportunity to expand our addressable market over the long term. As we dive deeper in the funnel we see more opportunity to increase the number of transactions and commissions to our partners." Many people think Zillow is right at the beginning of its journey and that it's just scratching the surface of the U.S. market opportunity. However, the numbers tell a different, more nuanced story. Sources of growth Zillow generates the vast majority of its revenues (...

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