



WAV Group 2011
MLS Technology
Survey Report
Executive Summary

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WAV Group Inc

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Executive Summary

From September 23, 2011 to October 21, 2011 WAV Group fielded the WAV Group 2011 MLS Technology Survey to participating MLSs. 66 MLSs, representing 33 different states or provinces participated in the survey at both staff and user level. 10,779 individual participants filled out the survey completely making it the largest survey of its kind. WAV Group would like to thank all of the MLSs and individual respondents that participated.

WAV Group

WAV Group has extensive experience in the MLS technology world having worked with hundreds of MLSs from system selection and installation to helping MLS vendors improve their products. We recognize that measuring satisfaction with a vendor or system is a complicated process. Surveys are just one tool that should be used when trying to gain a clear understanding of technology options. Averages that appear in this executive summary and in the individual vendor reports should be used for comparison purposes only as one piece of any overall system evaluation. Surveys should never be used on their own to make a technology selection. We recommend this information be included as part of your ongoing technology review but encourage you to do a detailed analysis when and if you are looking to make a technology change.

WAV Group provides full technology evaluation services and can help your MLS through this process whether you are interested in an industry/technology update or would like to do a full “Request for Proposal”. For more information on WAV Group services contact us at:

Email: mike@wavgroup.com

Office: 716-839-4628

Report Overview

This Executive Summary is provided at no charge to all of our friends in the industry. We hope you find this useful in your ongoing review of MLS technology services.

NOTE: All MLSs that participated in the WAV Group 2011 MLS Technology Survey received a detailed survey report for their MLS system, at no charge, which included all responses for that MLS system along with a summarized presentation of all open-end comments by respondents. MLSs that participated also received a matrix showing the means for all “1 – 10” rating questions for all MLS systems, for easy comparison of responses for all systems. We appreciate your participation and hope you find this information valuable in your ongoing technology review.

If your MLS would like to participate in the 2012 WAV Group MLS Technology Survey to receive a full MLS system report at no charge, please contact us at: sean@wavgroup.com

Additional Survey Report Options

A full survey report is available (13 individual MLS systems), which provides a detailed report for each MLS system along with a summarized report of user and staff comments, which we have reviewed at length and categorized for your convenience as well as a matrix showing the means for all “1 – 10” rating questions for all MLS systems, for easy comparison of responses for all systems. This report, along with individual system reports is available as outlined in Attachment 1 to this Executive Summary.

Custom MLS Reports On Request

Any MLS considering a review of other MLS systems, or any MLS that just wants to stay current in terms of MLS technology should consider ordering an expanded survey report for your MLS. You can order the full report (nearly 500 pages), which includes all MLS systems, or just choose the MLS systems you are most interested in. We will also be happy to do custom cross tabs for you if you would like to see more detailed information on selected data from market segments such as age, number of sales, or comfort with technology. A full set of questions included in the survey is included in attachment 2 to this Executive Summary for your review. Please feel free to contact us if you have any questions.

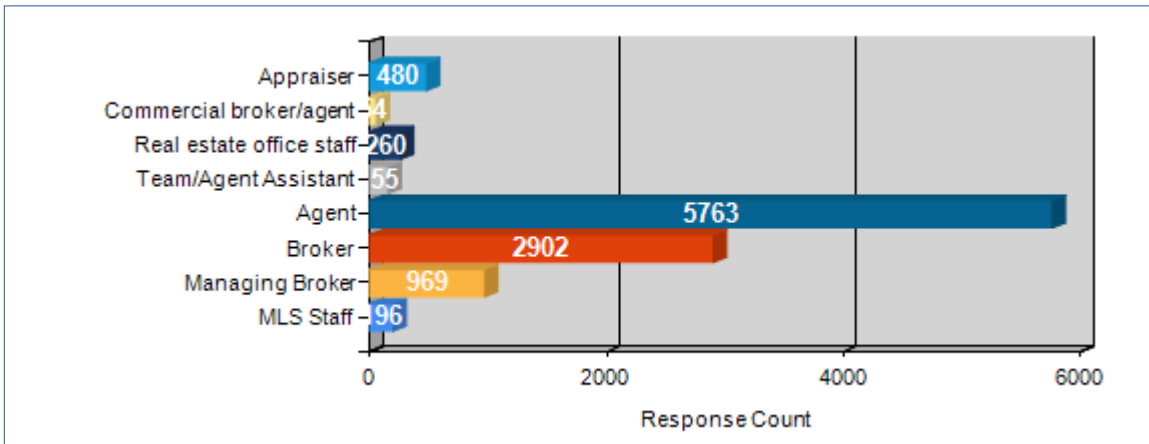
National survey information serves as a great foundation to show you how your system stacks up with other MLS systems and what users are saying about each of these systems. You will see what MLS staff thinks about each system as well as what the users say. You will have ratings on support, updates, and responsiveness as well as numerous insights on system functionality and what actual users are saying about each system.

We hope you find this information useful in your ongoing technology evaluations. We look forward to your feedback and participation in future MLS surveys.

WAV Group 2011 MLS Technology Survey Overview

Respondent Breakdown (Staff and Users)

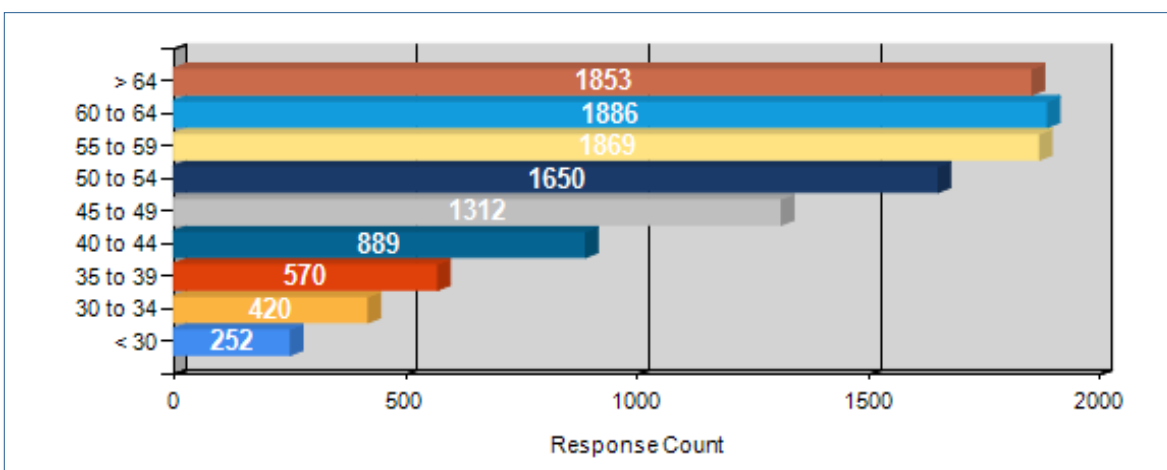
WAV Group believes strongly that to get a clear view of vendor performance you can not just ask staff for their opinions on an MLS system or how they feel users like the system. It is important to gain both a staff opinion and a user opinion to understand user satisfaction clearly. As you will see from the results in our survey, staff and user opinions often differ considerably. The breakdown of participants, by role is illustrated in the following charts.



	Choice	Response Percent	Response Total
1	MLS Staff	1.82 %	196
2	Managing Broker	8.99 %	969
3	Broker	26.92 %	2902
4	Agent	53.47 %	5763
5	Team/Agent Assistant	1.44 %	155
6	Real estate office staff	2.41 %	260
7	Commercial broker/agent	0.50 %	54
8	Appraiser	4.45 %	480

Age of Respondents

Age distribution was typical of the general Realtor population with heavy weighting in the 50+ categories.



MLS Systems Included

Seventeen (17) MLS systems were included in our survey analysis. Of the 17, 13 were vendor MLS systems and 4 were In-house MLS systems. Only vendor MLS systems with both staff and user ratings have been included in this report.

In-House system ratings have only been included in the aggregate for comparison purposes only.

Note: The ratings shown in this survey do not represent all accounts for each vendor or all users. Number of respondents per vendor vary and may impact overall results. WAV Group has made every effort to present clear and accurate information in this report but does not maintain that these ratings are statistically valid in all cases based on our sample size. Survey results such as these can be a helpful tool as part of an in-depth technology review but should not be used as the sole criteria for choosing or eliminating any vendor or system from consideration.

Vendor MLS Systems Included

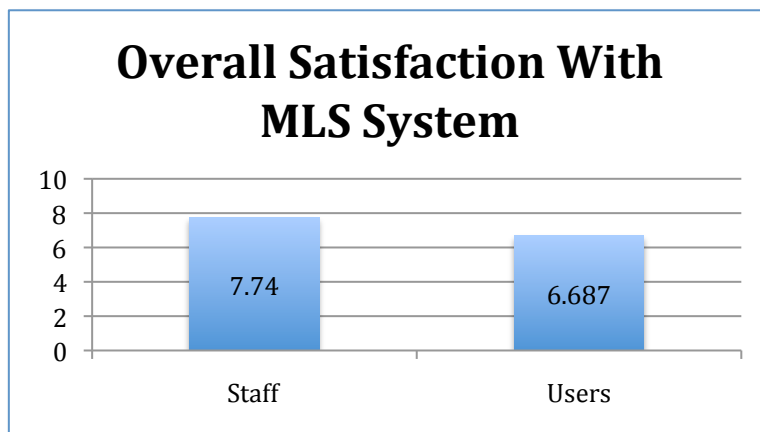
MLS System	Respondents
Connect MLS	3154
FlexMLS by FBS	1253
InnoVia by MarketLinx	296
LIST-IT MLS by Solid Earth	350
Matrix by MarketLinx	567
MLXchange by MarketLinx	1925
Navica MLS by Systems Engineering	46
Paragon 5 by LPS	772
Paragon XL by LPS	64

Rapattoni MLS	511
RealFocus	455
TEMPO 4 by MarketLinx	509
TEMPO 5 by MarketLinx	749

Key Findings

Ratings on many questions on our survey used a 10-point scale, which allowed staff and users to provide a wide range of feedback on each rating question that used this scale. Actual scores are not as important as comparative scores when looking at survey results.

One of the most interesting findings that was consistent throughout the survey is the fact that staff give higher ratings overall than users do. When we compare overall satisfaction we see that staff give their vendor and technology a rating of 7.74 while users rate it at 6.687.

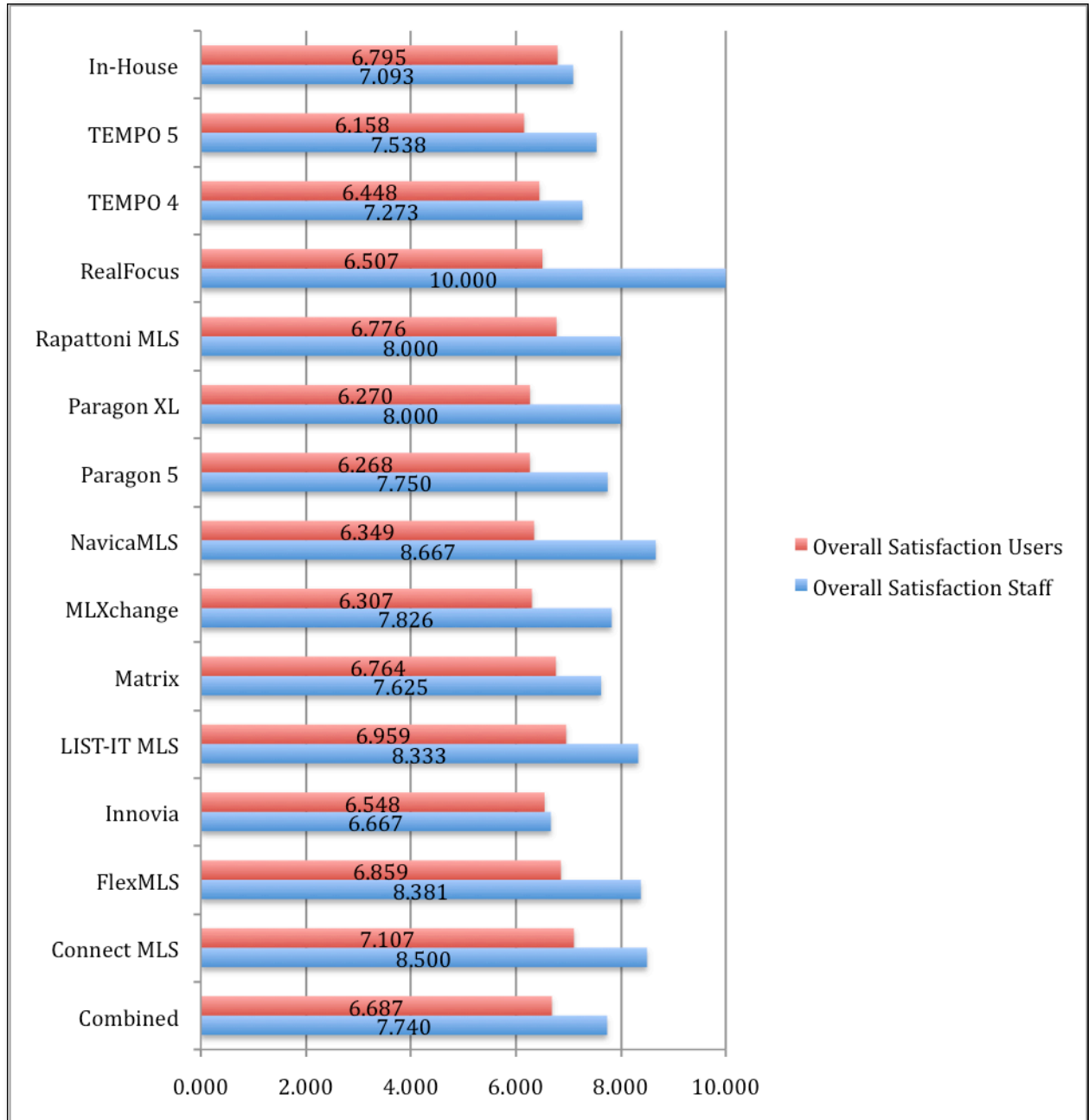


MLS Vendor Ratings – Overall Satisfaction

The following chart shows overall satisfaction for each system rated by both the staff and users. As you review the chart, note the following:

1. Staff ratings are consistently higher than user ratings.
2. In some cases the difference is considerable. You should note, on the chart shown on the next page, that the number of staff responding for each system varied considerably with some only have one person. This should obviously be taken into account when comparing results.
3. Vendors in the following chart are presented in reverse alphabetical order after the “in-house” category and placement in chart does not represent a ranking. See “means” for on each graph for comparison purposes.

Overall Satisfaction With MLS System



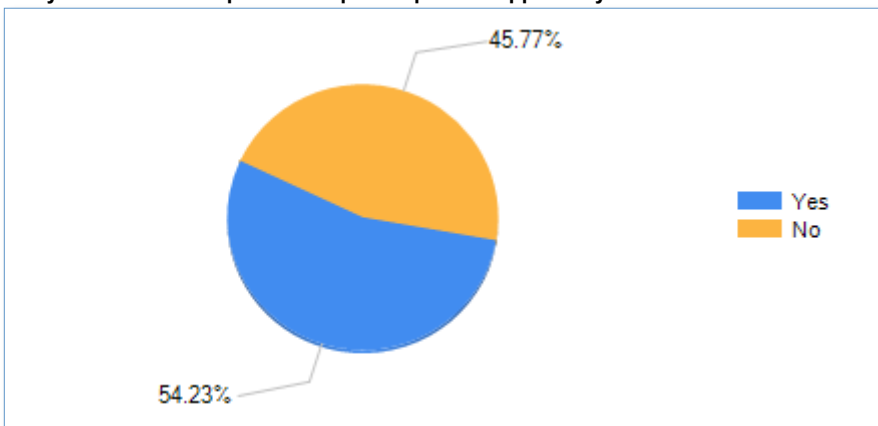
Number of MLS Staff Responding Per System

	Choice	Response Percent	Response Total
1	Connect MLS	12.24 %	24
2	FlexMLS by FBS	10.71 %	21
4	InnoVia by MarketLinx	3.06 %	6
5	LIST-IT MLS by Solid Earth	6.12 %	12
6	Matrix by MarketLinx	4.08 %	8
8	MLXchange by MarketLinx	11.73 %	23
9	Navica MLS by Systems Engineering	1.53 %	3
11	Paragon 5 by LPS	4.08 %	8
12	Paragon XL by LPS	0.51 %	1
13	Rapattoni MLS	5.10 %	10
14	RealFocus	0.51 %	1
17	TEMPO 4 by MarketLinx	5.61 %	11
18	TEMPO 5 by MarketLinx	6.63 %	13

Vendor Supplied Help Desk Services

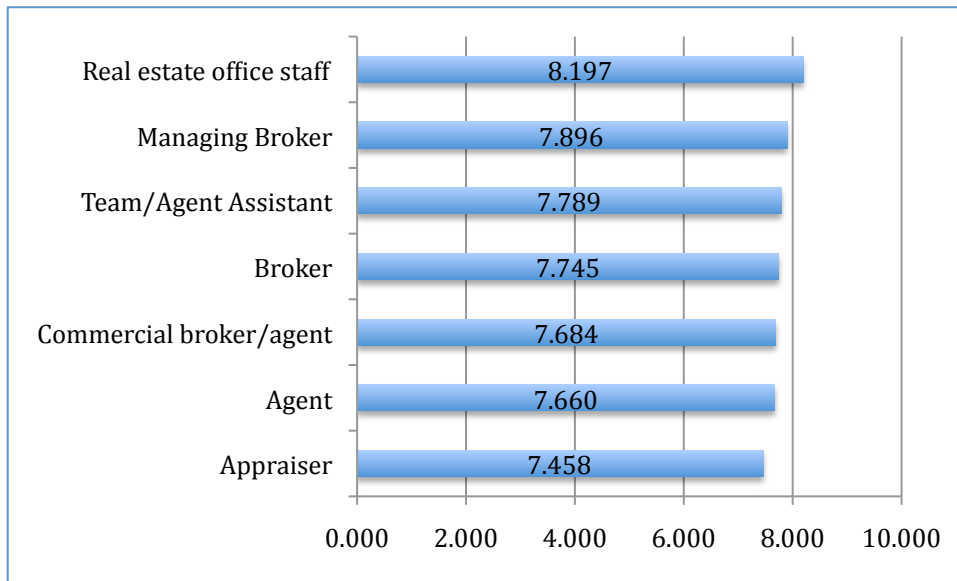
54.23% of the MLSs on the survey say their vendor supplies help desk service for their members.

Does your MLS vendor provide help desk phone support to your members?



When asked how they rated the technical support they receive the rating depended on the role, with real estate office staff the most satisfied and appraisers the least satisfied. Agents were second least satisfied.

Overall Satisfaction With Technical Support by Position



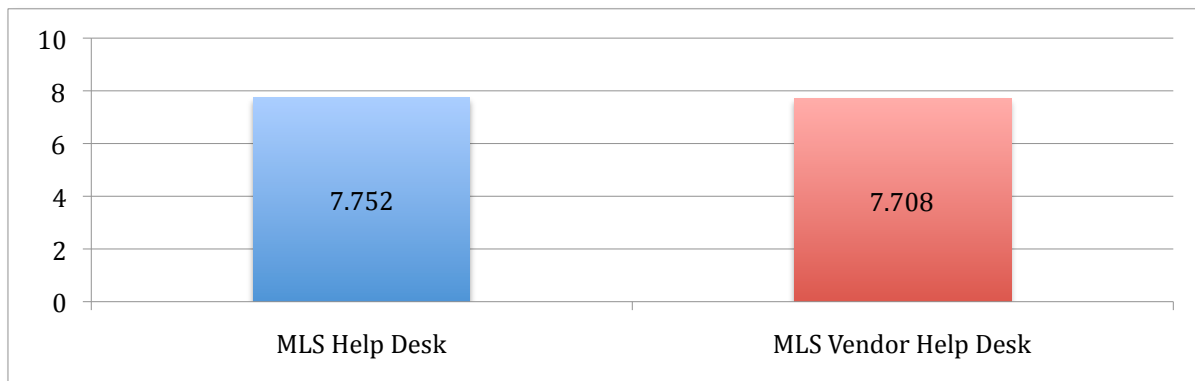
Vendor vs. MLS Supplied Help Desk Ratings

How does satisfaction with support differ when a vendor supplies help desk service vs. the MLS themselves?

The following chart shows the difference in satisfaction rating by users depending on who supplies the Help Desk support, the MLS or the Vendor. The MLS has a higher rating but not by much which indicates vendor Help Desk support is doing a good job overall.

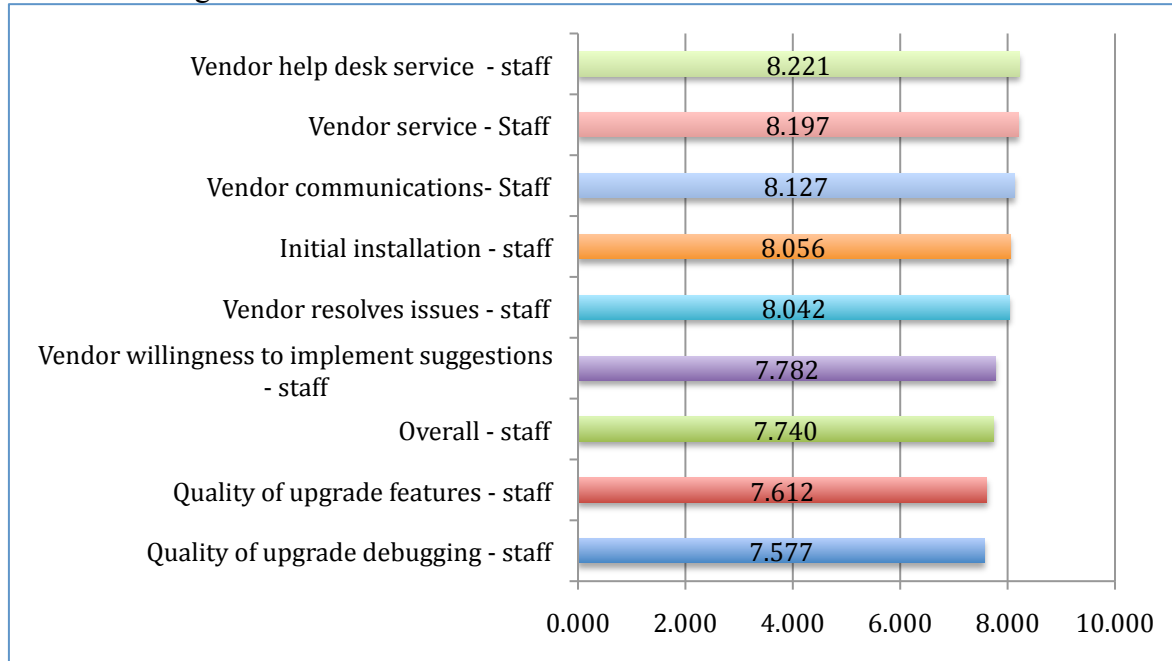
Staff Ratings Ranked by Category

Overall Staff Ratings Summary – All Vendors Combined



Summary of Staff Questions and Responses

Staff were asked a series of questions to ascertain their satisfaction with their vendor in a number of areas such as Help Desk, Overall Service, the Initial Installation and so on. Results are shown in the following chart.



- As noted by the charts above, vendor help desk services receive the highest ratings by staff. Service and communications are also reported to be very good.
- Initial installations do not show any significant drop in ratings and we did not see any major issues reported in open-end question in this area. This will vary from vendor to vendor but overall the quality of installations is reported to be quite good.
- The lowest ratings went to the quality of upgrade features and the debugging process that is done prior to implementation.

What is Staff Most Unhappy With?

- The most common complaint by staff was the lack of cross browser compatibility seen in a number of MLS systems still.
- Staff also rated the quality of upgrades lower than other services, noting vendors need to do a better job of debugging prior to implementation.
- Overall, most staff seemed quite pleased with the services and technology they receive from their vendors. Staff reports that vendors listen, are responsive when there are issues and communicate well overall.

User Ratings

What personal computer platform do you use?

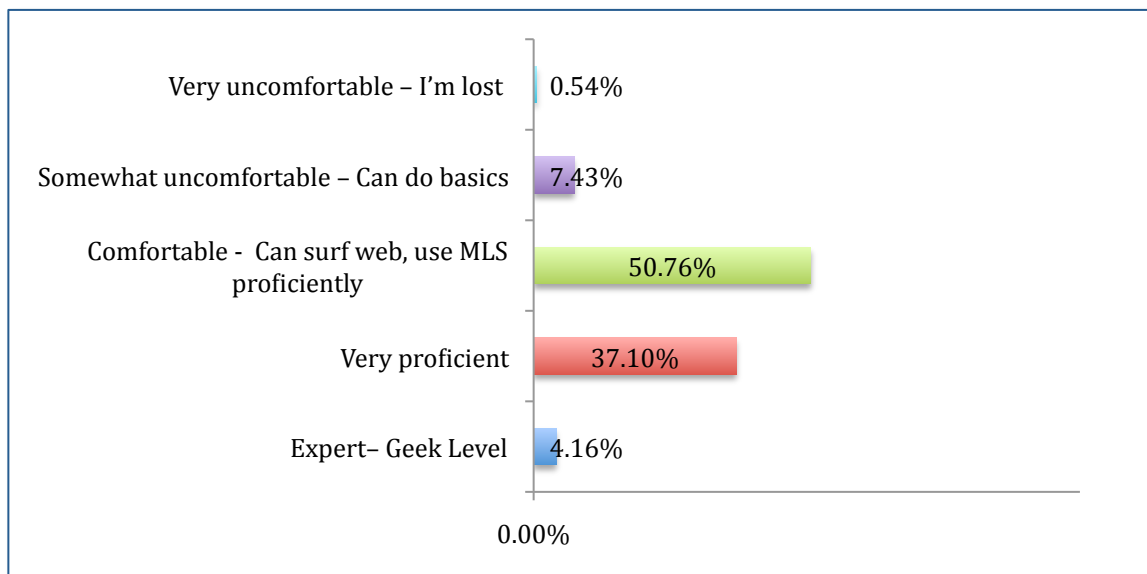
- 92% reported they use Windows
- 9.56% reported they use Mac
- 7.17% report they would like to use Mac but it is not supported by their MLS system

What is the primary browser you use?

- 75.37% use Internet Explorer
- 7.27% use Google Chrome
- 12.93% use Firefox
- 3.28% use Safari
- .01% use Opera
- 1.13% use Other

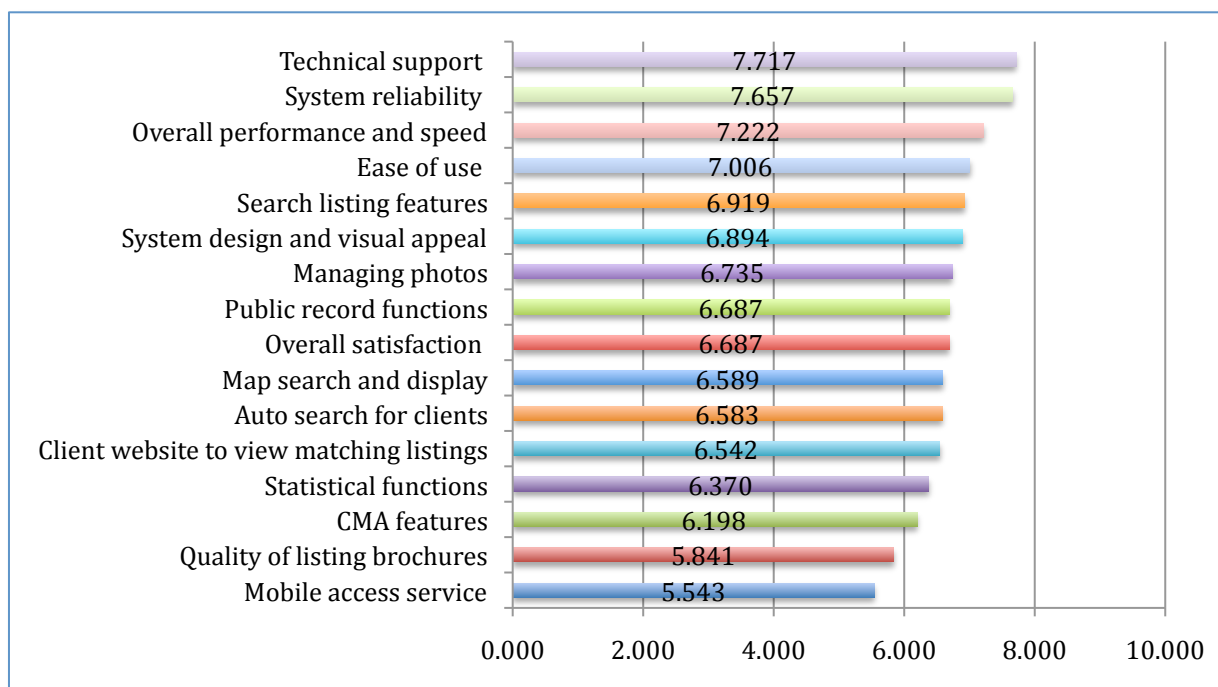
User Comfort Level With Technology

As noted by the chart below, very few users report they are uncomfortable with technology anymore. Only 7.43% report they are somewhat uncomfortable with technology with over 40% reporting they are proficient or an actual geek!



Overall User Feature Ratings

Detailed staff and user ratings are included in each individual system report. The following chart shows an overall rating by the users for all systems combined which indicate certain areas, such as mobile access, that are still not seen as capable as other parts of the MLS technology.



- As you might expect with mature technology, support and reliability are fairly consistent throughout the MLS platforms. Speed is also rated high overall.
- WAV Group is very happy to see that “Ease of Use” received a good overall rating as this is a huge key to adoption as detailed in our recent white paper, [“Real Estate Technology – Keys to Adoption”](#)
- Surprisingly, the area that is probably the most important for MLS systems moving forward, mobile technology is rated the lowest. It appears that MLS vendors have not caught up in this feature area in the eyes of their users. While the numbers in the chart above represent aggregated scores no vendor scored exceptionally well in the mobile category. A number of user comments have also been included in this summary that illustrate user frustration with current mobile technology products. Individual ratings can be obtained in the Custom Report Options as detailed in Attachment 1.
- Other areas that were a bit surprising were statistics, CMA and the quality of listing brochures. Responses of course vary from system to system but these features and functional areas were consistently rated lower than other product areas.

Additional Feedback Reported By Users

Mapping Satisfaction – User Feedback

The follow comments are representative samples taken from thousands of user comments. Additional comments are included by category in each detailed system report.

Explanation of their ratings on the mapping features

- The polygon search is viewed very favorably by many as a great addition.

- Some note that the map displays have improved considerably.
- Some use maps as their primary search
- Map search results are inconsistent. Many listings are not mapped properly causing errors in search results. I only use this feature as a "second option".
- Many report they find current mapping technology easy to use
- It is sometime difficult to teach this feature to members because of slow load times.
- Many report maps are too slow in building
- Many feel the map functionality is not easy to use
- Many report that address searches are often not accurate. One person reported the search took them to Italy
- A common complaint is the quality of mapping data
- Many report that mapping search controls are not intuitive. Some report they use 3rd party systems instead

Observation: It was clear from reading through the detailed comments for all vendors that views of mapping technology varied greatly, even for the same vendor. It was not uncommon for one person to say how much they liked mapping for a vendor, noting ease of use, while another noted mapping was inadequate and difficult to use. This was a bit of a recurring theme as was the quality and inconsistency of the mapping data. We believe this points to interface issues and overall ease of use of mapping products and suggest close attention be given when comparing mapping products through hands on user testing. Users that take the time to learn how to use the mapping interfaces may like the functionality, but many users appear to be frustrated and have backed away from the mapping component.

Some representative answers to “The thing I like best about the MLS system is...”

- Capability to run multiple instances (duplicate tab) without having to re-login.
- Overall ease of use
- The search results are clear and comprehensive. The client’s personal websites are very nice.
- Fast and extremely reliable
- Dependable, almost never "down". Easy to search for listings.
- The information on the system can be accessed through several different sources, i.e. computer, smart phone, etc.
- The ease of use and ability to quickly obtain the information I need. The ability to search more than one area by map. The tools and features offered.

Observation: The basics in most systems are very good. These are mature systems. Many systems now offer the ability to have multiple simultaneous sessions, a feature first introduced by Concentric MLS (Now Discover MLS). System uptime is always 99%+.

Some representative answers to “Our system would be better if”

- I would like better MLS search, appearance and usage, contact sync with email services like outlook, gmail, etc. Custom email flyers and contact system.

- Compatible with multiple OSs (i.e. MAC, Android etc) Mobility is here to stay and we need ways to access MLX through multiple devices... MLX must become more open.
- It offered more visually appealing CMA features, flyer features, and e-marketing features. Photo layouts are awkward at times and not altogether professional looking.
- It could be used on multiple platforms, and was brought into 21st century technology.
- Prospect searches need to be easier to set up for the clients and easier to modify.
- Supported Firefox
- Better customization features, full support for Macs, better support for iPad, iPhone, etc. - i.e. - apps.
- We had better report generation
- Better ability to customize reports could have short sale and foreclosure category to make searching easier
- We could control data integrity and limit user errors...garbage in, garbage out
- The agents were held accountable for the data they input... so much is incorrect!
- It worked with more operating systems like the iPad
- Better mobile capabilities; less fobs and or keys; more page or view customization options.
- More functionality across various browsers (e.g. html email format in Google Chrome...etc.)

Observation: A number of themes seemed to recur from vendor to vendor. The lack of cross browser compatibility was a huge and repetitive complaint on some systems. Unhappiness with report generation and listing brochures was also a common complaint as was overall concern about finding ways to insure more accurate data. Perhaps the most common complaint on all systems was the desire for better mobile applications.

What would make mobile technology better?

- Takes a long time to load on my iPhone. Doesn't always have all the information.
- Make it work on a smaller mobile device!
- A mobile app would be easier to navigate on a smart phone.
- I use IPAD - doesn't scroll in certain situations and sometimes won't load or kicks you out.
- MAKE IT MORE LIKE THE MOBILE VERSION OF REALTOR.COM.

Observation: Users are mobile but users report that MLS mobile applications are not providing the level of mobile access they are looking for. Users want easy applications not browser access and users want to be able to do more than just search. They want the ability to make simple listing changes and they want access that is fast and doesn't have a cumbersome log in process. We have good examples. Realtor.com's mobile solution is mentioned numerous times as a model to follow. Vendors that are able to answer the mobile call will find themselves with a distinct advantage, as the overall rating in the mobile arena is not high.

Some Conclusions

- MLS technology is solid, reliable and overall performance is seen as good across the board.

- Staff are more happy than users overall.
- Lack of debugging with upgrades is a common complaint of staff.
- CMAs, statistical functions, brochures and mobile technologies rate lowest in terms of user satisfaction.
- Data inaccuracy was noted numerous times by users as a consistent problem affecting overall searching and also the usefulness of mapping.
- For details on individual system see options in Attachment 1.

Attachment 1

Custom Survey Options

Custom Survey Options

MLSs that participated in the survey received at no cost:

- The Executive Summary
- A Full MLS report for their specific MLS system – included all respondents for that system
- Matrix “Mean” chart comparison for all “1 – 10” rating questions for all MLS systems

Full Survey Report (PDF)

- The Full Survey Report includes detailed survey results for all 13 MLS vendor systems reviewed, with summarized open-end responses. The Full Survey Report also includes a comparison of “mean ratings” of all systems for each “1-10” rated question for easy comparison.
- Custom cross tab analysis of the data is available upon request.
- Call or email for details and pricing.
- ***If your MLS participated in the MLS survey, and you order the full survey report, we will also include a custom report with results just from your members at no additional charge.***

Individual MLS System Reports (PDF)

- Individual MLS system reports, that include data for all respondents for each MLS system, are available at a fee of \$500 per system (**provided free to MLSs that participated**). Each report contains detailed survey results for all respondents on that system, with summarized open-end responses. If multiple MLS system reports are ordered the report also includes Matrix “Mean” chart comparison for all “1 – 10” rating questions for all MLS systems.

Custom cross tab analysis of the data is available upon request. Additional pricing may apply.

Contact us at: sean@wavgroup.com or 716-839-4628 to order your reports.

Attachment 2

Survey Questions

2011 MLS Technology Survey Questions

Background Information

1. What state is your Multiple Listing Service in?

2. What Multiple Listing Service do you belong to?

2.1. What MLS system do you use?

*3. What is your position? (choose all that apply) (*Required)

- MLS Staff
- Broker
- Agent
- Team/Agent Assistant
- Real Estate Office Staff
- Commercial Broker/Agent
- Appraiser

4. What is your age?

- < 29
- 30 to 34
- 35 to 39
- 40 to 44
- 45 to 49
- 50 to 54
- 55 to 59
- 60 to 64
- > 65

5. How would you rate yourself in terms of your comfort level with PC and Internet technology?

- Expert– Geek Level
- Very proficient – Understand and use technology better than most of my peers
- Comfortable - Can surf web, use MLS proficiently, use basic office software
- Somewhat uncomfortable – Can do basics but pretty uncomfortable with technology
- Very uncomfortable – I'm lost with technology

MLS Staff Questions

6. What is the size of your MLS?

- 1-1,000
- 1,001 - 2,000
- 2,001 -5,000
- 5,001 - 10,000
- 10,001 - 20,000
- 20,001 +

7. On a scale of 1 to 10, rate your satisfaction with your MLS vendor in the following areas. (1 is not satisfied at all and 10 is totally satisfied)

- Overall customer service with management and staff
- Quality of communications
- Quality of initial installation
- Quality of upgrades in terms of features and functions
- Quality of upgrades in terms of quality control (debugging before upgrade)
- Resolving issues when they do come up
- Willingness to implement suggested changes to the MLS system

8. Does your MLS vendor provide help desk phone support to your members?

- Yes (Go to question 9.)
- No (Go to question 10.)

9. On a scale of 1 to 10 rate the level of service provided to your members by your MLS vendor's help desk. (1 is bad service and 10 is outstanding service)

10. How soon does your contract end with your current vendor?

- Less than 1 year
- 1 - 2 years
- 2 - 3 years
- >3 years

11. How likely are you to renew with your current MLS vendor?

- No question, we will likely renew without a vendor search
- Very probable but plan to look at all options first
- Not sure, we have had issues and plan to look seriously at other vendors
- We plan to look for a new MLS vendor

MLS System User Questions

12. How many offices does your real estate company have?

- 1
- 2 to 5
- 6 to 10
- 11 to 20
- > 20

13. How many agents does your company have?

- 1 to 5 agents
- 6 to 20 agents
- 21 - 50 agents
- 51 - 100 agents
- 100 - 200 agents
- > 200 agents

14. How many transaction sides do you do in an average year? Each buying or selling side counts as 1 side.

- < 5
- 6-10
- 11-20
- 20-50
- > 50

MLS Technology Questions

15. Which personal computer platform do you use?

- Windows
- MAC
- Would like to use MAC but not supported by MLS system

16. Please answer the following regarding Internet browsers?

Browser you use to access your MLS?

- Internet Explorer
- Google Chrome
- Safari
- Firefox
- Opera

Browser you would like to use to access your MLS?

- Internet Explorer
- Google Chrome
- Safari
- Firefox
- Opera

Technology Satisfaction

17. On a scale of 1 to 10, how would you rate your overall satisfaction with your MLS system? (1 is not satisfied and 10 is extremely satisfied)

18. On a scale of 1 to 10, how reliable is your MLS system? (1 is not reliable at all and 10 is totally reliable)

19. Do you receive technical phone support from your Multiple Listing Service?

- Yes (Go to question 20.)
- No (Go to question 21.)
- Not Sure (Go to question 21.)

20. On a scale of 1 to 10, how would you rate the technical support you receive from your MLS? (1 is very poor and 10 is outstanding)

21. How would you rate your MLS system in terms of overall performance and speed? (1 is not good at all, and 10 is outstanding)

22. Do you believe your MLS system is state of the art compared to other property search sites you have used?

- Yes (Go to question 0.)
- No (Go to question 23.)
- Not sure - don't know what to compare it to (Go to question 0.)

23. Please explain your answer in the text box below:

System Design

24. On a scale of 1 to 10, how would you rate your MLS system in terms of it's design and visual appeal? (1 is very poor and 10 is extremely well designed)

25. On a scale of 1 to 10, how would you rate your MLS system in terms of it's ease of use? (1 is very hard to use and 10 is extremely easy to use)

MLS System Functionality

26. On a scale of 1 to 10, how would you rate your MLS system in the following functional areas? (1 is very poor and 10 is outstanding)

- Add and modify listings
- Setting up auto search for clients
- Searching for listings (text search)
- Map search and display features
- Contact management features
- CMA (Comparative Market Analysis)
- Hotsheet/Market update functionality
- Quality of listing brochures and reports
- Ability to brand and personalize reports easily
- Statistical Report Functions
- Tax/Public record functions
- Ability to add and access documents attached to listings
- Ease of loading/managing photos

27. Does your MLS system provide a portal or website for your clients to view listings from auto searches?

- Yes (Go to question 28.)
- No (Go to question 30.)
- Not sure (Go to question 30.)

28. On a scale of 1 to 10, how would you rate the client portal overall? (1 is very poor and 10 is excellent)

29. How satisfied are your clients with the auto search/client portal on your MLS system they use to view matching listings and property information?

- Extremely
- Very satisfied
- Somewhat satisfied
- Not satisfied
- Not sure - haven't asked

30. The think I like best about the MLS system is...

31. Our MLS system would be better if...

Mobile Technology

32. Which of the following statements best describes your use of mobile technology?

- I access the MLS through a mobile device all the time (Go to question 33.)
- I have accessed the MLS through a mobile device but not regularly (Go to question 33.)
- I have not accessed the MLS through a mobile device
- Our MLS does not offer mobile access
- I'm not sure if the MLS offers mobile access

33. On a scale of 1 to 10, how would you rate your satisfaction with the mobile MLS access service offered by your MLS? ? (1 is not satisfied and 10 is totally satisfied)

34. What would make the mobile application better?

About WAV Group

WAV Group is a leader in providing consulting services to the real estate industry and is comprised of corporate executives with a depth of expertise in both the real estate industry as well as the consumer market.

The company has conducted studies for some of the largest organizations in the industry including the National Association of REALTORS®, California Association of REALTORS® and others. It has also authored many independent papers such as the [The Shift in Brokerage Technology](#), [Real Estate Technology – Keys to Adoption in 2011](#) and studies including the [2009 Transaction Management Adoption Study](#), [MLS Consumer Website Effectiveness Study](#), [Broker Website Effectiveness Study](#), and [New Options For MLS Data Use](#) along with many others. For more information or to register to receive report releases and newsletters please contact Mike Audet at mike@wavgroup.com.

WAV Group works with Multiple Listing Services, Associations, real estate firms, franchise organizations and technology vendors in the US, Canada and Europe. WAV Group has expertise in the areas of strategic planning, technology evaluation, product development, market research, recruiting, sales & marketing plan development, technology selection and implementation.

For more information on WAV Group products and services, contact [Mike Audet](#) at mike@wavgroup.com visit or website at www.wavgroup.com.