



WAV Group 2012 MLS Technology Survey Report

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WAV Group Inc

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Executive Summary

From September 29, 2012 to November 4, 2012 WAV Group fielded the WAV Group 2012 MLS Technology Survey to participating MLSs. 72 MLSs, representing 37 different states or provinces participated in the survey at both staff and user level. 15,130 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.

This survey report is unsponsored and is provided at no charge to our friends in the industry. We hope you find this useful in your ongoing review of MLS technology services. In addition, all of the MLSs that participated in the WAV Group 2012 MLS Technology Survey received a detailed survey report for their MLS system, at no charge, which includes the results from all of the MLSs that use that MLS system.

Survey Design

The 2012 WAV Group MLS Technology survey was designed with two sets of questions, one for staff and one for users of the MLS system. Logic was also designed into the survey so respondents only rated system features that they used.

Ratings on many questions on the 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. As you review the survey results understand that actual scores are not always as important as comparative scores, which show what elements of the system respondents believe are stronger or weaker.

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.

WAV Group

WAV Group has extensive experience working with MLS vendors and MLS technology having worked with hundreds of MLSs from system selection and installation for MLSs to helping MLS vendors improve their products. WAV Group founding partner Mike Audet leads the MLS Technology research for WAV Group. As an executive with multiple MLS vendors and other technology companies prior to forming WAV Group, Mike has been on both the delivery side and the customer side of this technology. 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 survey report 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 assists MLSs each year with technology evaluation and selection and can help you're your organization 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

WAV Group 2011 MLS Technology Survey Overview

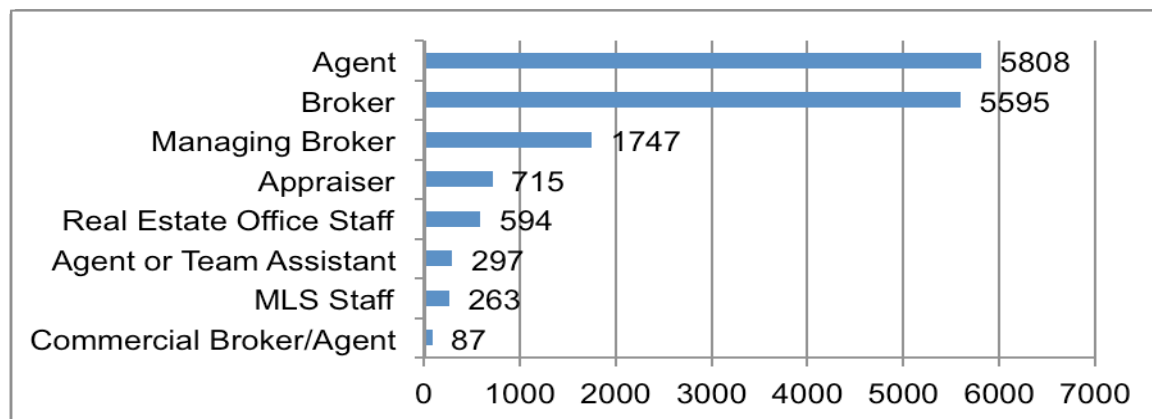
The survey report is divided into four sections. The first section provides background on the participants and MLS systems included in the survey along with some general observations from the overall results.

The second section is a summary of user comments on each MLS system included in the survey where they note what they like best about their system and what they would like to see improved.

The final two sections are staff and user results to the survey questions.

Respondent Breakdown (Staff and Users)

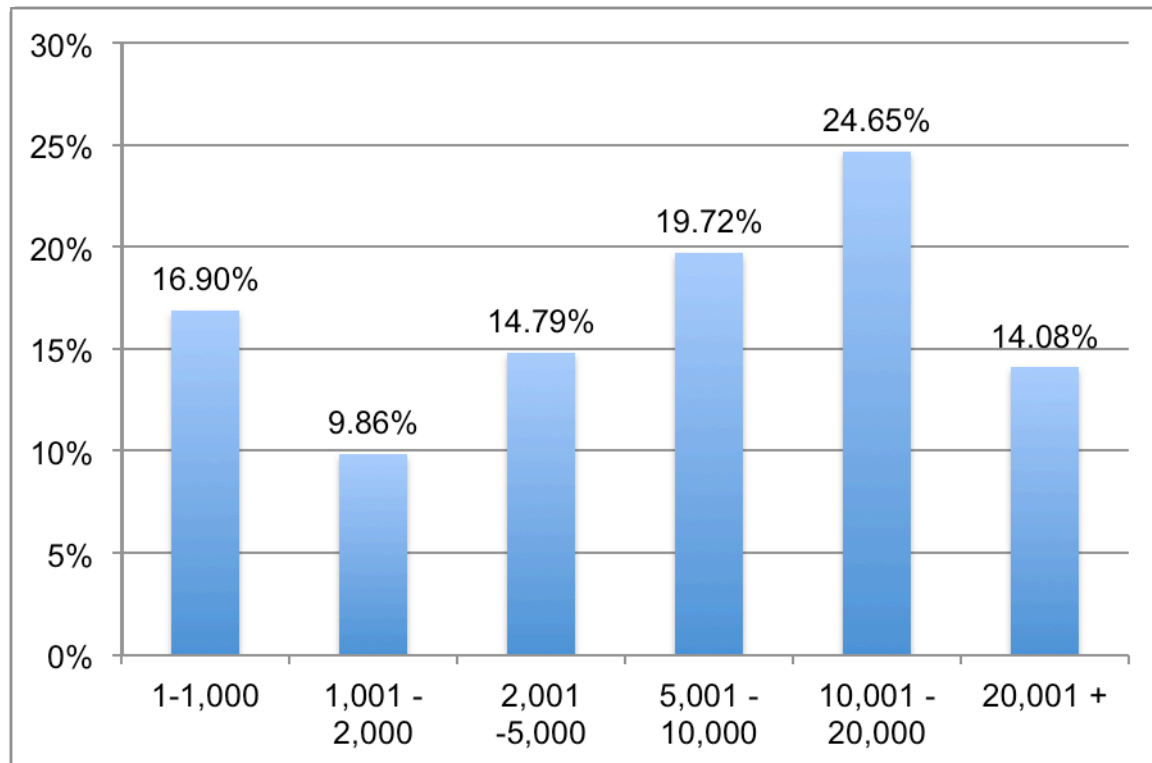
WAV Group believes strongly that to get a clear view of vendor performance you can not just ask staff for their opinions on an MLS system or how they feel users like the system. It is important to gain both a staff opinion and a user opinion to understand user satisfaction clearly. As you will see from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



Age of Respondents

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

Size of MLSs



- MLSs of all sizes were well represented in the survey.

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. Tempo 4 only had staff ratings. 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.

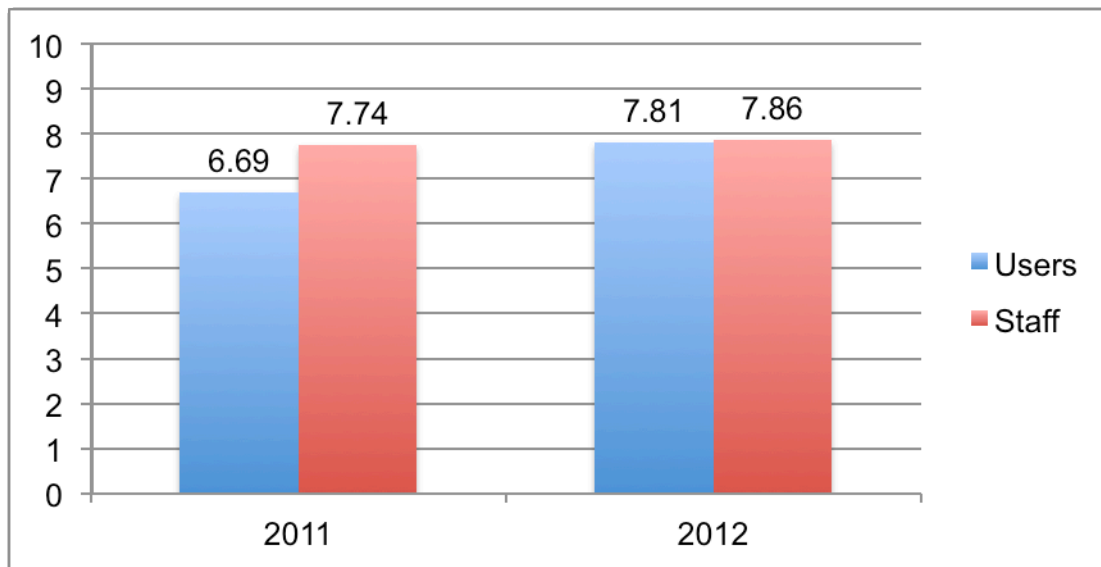
Vendor MLS Systems Included

MLS System	Respondents
connect MLS	4682
FlexMLS by FBS	422
Fusion by MarketLinx	527
InnoVia by MarketLinx	165
LIST-IT MLS by Solid Earth	1240
Matrix by MarketLinx	3151
MLXchange by MarketLinx	874
Navica MLS by Systems Engineering	34
Paragon 5 by LPS	480
Rapattoni MLS	777
TEMPO 5 by MarketLinx	508
In-House MLS Systems (4)	2212

General Observations

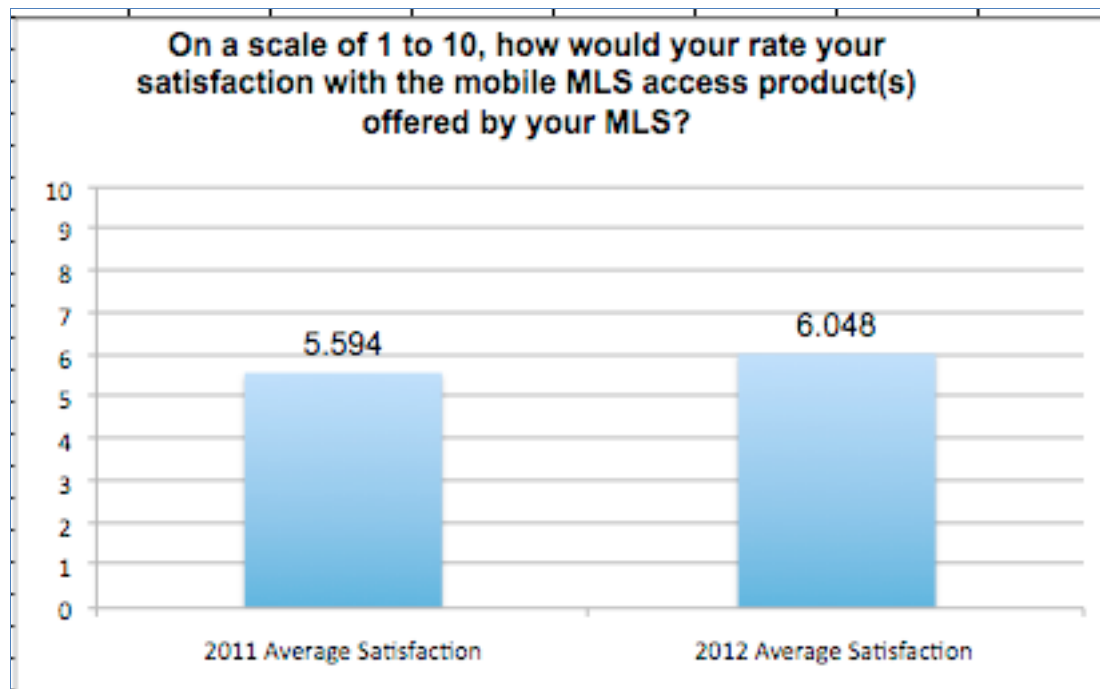
It was interesting to note that in 2012, staff and user ratings were much closer than in 2011. MLS staff still rate the systems higher, overall, than users but the delta has narrowed. When we compare overall satisfaction we see that staff gave their vendor and technology a rating of 7.86 while users rate them at 7.81. This is a combination of all systems together.

Staff vs. User Ratings – All Systems Combined



Mobile Technology – All System Combined

Mobile is a critical area of MLS technology today. In the 2011 WAV Group MLS Technology Survey it was clear that staff and users were not happy with the mobile technology provided by their vendors. There have definitely been some improvements in mobile technology over the past year for some MLS vendors but they have not been dramatic according to our survey respondents.



- As noted above, satisfaction rose only about .5 looking at all vendors together, from 5.594 to 6.048. Mobile continues to be one of the key areas of need noted in the open-end comments for a number of the MLS systems.

User Comments – What They Like – What They Want to See Improved

Survey respondents were asked two open-end questions about what they liked best about their MLS system and what they would like to see improved. The following is a brief summary for each of the MLS systems for these questions based on the most frequent comments for each MLS system.

connect MLS

What I Like Best About The MLS System...

In 2012, the most popular open comments reported by connectMLS system users on what they liked best about the MLS system were the speed of the system, the accuracy of data within the system, the system's ease of use, the support offered by the MLS, and the extensive and advanced searching. Other comments included:

- *Speed, reliability, browser neutral*
- *Accuracy of data*
- *Ease of searching and finding data*
- *Map searching*

- *Mobile access – being able to access full features of the MLS from mobile*

Our MLS System Would Be Better If...

In 2012, the most common areas noted by connectMLS system users on what they felt could be immediately improved were the lack of training, and the accuracy of tax data. Other items mentioned included:

- *Photos were easier to edit and upload*
- *Members of teams could access same searches*
- *You could do a “speed search” using google type entry*
- *You could bring up tax records more easily*

Note that comments like “lack of training” may have nothing to do with the MLS vendor or the MLS system as these services may be offered and controlled by the MLS.

FlexMLS

What I Like Best About The MLS System...

In 2012, the most popular open comments reported by FlexMLS system users on what they liked best about the MLS system were the accuracy and amount of data in the system, the system’s ease of use, the support offered by the MLS, and searching. Other typical comments included:

- *Easy data entry*
- *Accurate and efficient*
- *Ease of use*
- *Easy search and statistics*

Our MLS System Would Be Better If...

In 2012, the most common areas noted by FlexMLS system users on what they felt could be immediately improved were the accuracy of data within the system, photo management, the lack of training, and the amount of support offered by the MLS. Other comments included:

- *Information put into the system must be accurate in order for reports and searches to work properly.*
- *Photos could be uploaded more easily and in a batch*

- *Clients could set up their own searches within their portal and modify searches / send them*
- *Make the map searches better to use.*

Note that user comments such as “amount of support offered by the MLS” have nothing to do with the actual MLS system. It is also interesting to note that some users noted data accuracy as a strength while others felt it needed to be improved. The same was true for MLS support.

Fusion

What I Like Best About The MLS System...

In 2012, the most popular open comments reported by Fusion system users on what they liked best about the MLS system were the support offered by the system, the ease of editing a listing, the system’s MAC/Apple compatibility, the advanced searching, and the system’s ease of use. Other comments included:

- *In general, the system is smooth and easy to navigate*
- *The new listing and editing functions (adding photos, especially) seem to have improved significantly*
- *Fast (so much faster than tempo), efficient, works on browsers other than IE (Firefox, Safari, Chrome), 'tabbed " searches, ease of use*
- *Ease of entering listings and making updates on those listings. Ease of searching and extended search capabilities.*
- *Being able to run multiple searches at once*

Our MLS System Would Be Better If...

In 2012, the most common areas noted by Fusion system users on what they felt could be immediately improved were the speed of the system, the training available to users, the functionality of searching on the system, and the mobile aspect of the system.

- *Needs to be FASTER. It is very slow no matter whose network I'm on. Also needs a better mobile app*
- *It were easier to quickly display the detail view of listings selected and if you could do a quick CMA from mls search in the home screen.*
- *The mobile app could do as much as the fusion does.*
- *The mobile app would allow me to do a CMA on the fly*

Again we see conflicting strengths and weaknesses. Users list speed, for example as a strength and others note it as a weakness. Be aware that issues such as speed can often be a result of elements not related at all to the MLS system.

In-House Systems Combined

What I Like Best About The MLS System...

In 2012, the most popular open comments reported by In-house system users on what they liked best about the MLS system were the access to the system's data, the quality of support, the wealth of information in the system, and the overall functionality of the system. Other comments included:

- *Constantly adding new services. Good technical support.*
- *Courtesy of support group and cutting edge enhancements to system*
- *Increase in functionality over time. MLS stays in touch with the market.*
- *It has a great deal of functionality and is very user friendly in my opinion.*
- *It's straight forward and relatively easy to navigate. It provides most if not all of the search features and functionality I look for in a database system.*

Our MLS System Would Be Better If...

In 2012, the most common areas noted by In-house system users on what they felt could be immediately improved were regarding the system's ease of use, the speed of the system, the availability and quality of training and support, as well as the accuracy of the data within the system. Other comments included:

- *Ease of input for listings hate the way it is setup*
- *Easier ability to add search features and have it work correctly.*
- *Easier to do photos, had some type of connection to Registry searches, and if we could do searches using mapped out areas.*
- *It would work faster and more consistently, without constant glitches, either with loading or emailing searches for clients*
- *It had a searchable map, offered websites for my clients, had better and more accurate tax info, updates for town record/owner record, better uploading of pictures, more compatible with KWLS, more compatible with realtor.com.*
- *It had more accurate property information from tax records.*

InnoVia

What I Like Best About The MLS System...

In 2012, the most popular open comments reported by InnoVia system users on what they liked best about the MLS system were the system's ease of use, the extensive and detailed searching, it's functionality, as well as the reporting and customization options. Other comments included:

- *It stays on line. It is real easy to use. I can manipulate it to suit my needs*
- *The ability to customize reports and search screens, ease of export to common spreadsheet programs.*
- *The huge database that it contains. The historical transactions of properties.*
- *Auto searches and ease of use*

Our MLS System Would Be Better If...

In 2012, the most common areas noted by InnoVia system users on what they felt could be immediately improved were the functionality of searching on the MLS system, the system's functionality as a whole, the mobile aspect of the MLS system, the support made available, and the amount of training that is available to those that use the system.

- *Easier to search*
- *Give us info on the map searches using the circle, polygon and rectangular features.*
- *if I could search vacant land, residential, commercial, and multi fam together or the ability to search 2 or more in one search. As it is now I have to search each category individually*
- *The search mapping system was improved*
- *I could load pictures into listings prior to them hitting the market.*
- *Loading photos are difficult and time consuming.*

Note that "training" and "support" are not elements of the MLS system but are really services controlled by the MLS.

LIST IT MLS

What I Like Best About The MLS System...

In 2012, the most popular open comments reported by LIST-IT MLS system users on what they liked best about the MLS system were the accuracy of the data within the MLS, the system's ease of use, the support offered by the MLS, the searching for both the user and the client, and the support offered by the MLS.

- *Its ease of use. It's fast and simple. Simple to personalize for clients and send. Entry of pictures and information for listings is simple. All needed corrections are given collectively. Pictures can be entered in bunch. Overall ease of use compared to those I have used in the past.*
- *CMA reports*

Our MLS System Would Be Better If...

In 2012, the most common areas noted by LIST-IT MLS system users on what they felt could be immediately improved were the design, contents, and layout of the user interface, the speed of the system, the support available, the quality and amount of training as well as the mapping functionality. Other comments included:

- We updated the interface for both agent and client. Also, we need a way to clean up data so that it is accurate.
- The tax search was faster and the picture loading was easier.
- It was easier/faster to use from my iphone.
- If we had a more robust search capability as well as better map searches. It also needs a better mobile platform and should be compatible with multiple browsers not just IE.

Note that "support offered by MLS" is not an MLS systems issue.

Matrix

What I Like Best About The MLS System...

In 2012, the most popular open comments reported by Matrix system users on what they liked best about the MLS system were the access to the system's data, the ease of use, the wealth of information in the system and the overall search functionality.

- *It provides a very fast and comprehensive database of information on properties as it incorporates Realist as well as all listing information.*

- *Ease of use for modifying listings, search capabilities, easy linkage to tax information, RealAVM estimated values*
- *Easy search window with the 3 tabs, one for criteria, one for map, and one for results. I go back-and-forth between those a lot.*

Our MLS System Would Be Better If...

In 2012, the most common areas noted by Matrix system users on what they felt could be immediately improved were in regards to the system's regular changes and upgrades, the functionality of the system, searching on the system, and the training available.

- *Changes and requests for bug fixes were done efficiently and much faster. We continue to have problems with Matrix that have existed since Day One.*
- *It was easier to use and not so complicated. Doesn't flow like the old system did. Print listing functions are too confusing - you have to go to different pages to find the print function you want to use. Should all be on one page.*
- *It was easier to use the map function to search for listings*
- *It was more functional on a mobile browser*

Note that there are comments saying "ease of use" is a system strength as well as a weakness. Comments related to training are also typically related more to MLS services than MLS system capabilities.

MLXchange

What I Like Best About The MLS System...

In 2012, the most popular open comments reported by MLXchange system users on what they liked best about the MLS system were the information available, the reliability and accessibility, the system's ease of use, and the searching functionality.

- *Fast and extremely reliable*
- *Dependable, almost never "down". Easy to search for listings.*
- *CMA reports are easy and make a good presentation.*
- *Ease of entering a new listing and down loading pictures*
- *Ability to search via map*
- *The ability to quickly search the MLS for listings and the different ways I can print out information for clients.*

Our MLS System Would Be Better If...

In 2012, the most common areas noted by MLXchange system users on what they felt could be immediately improved were the browsers and devices to access the MLS, the layout and functionality of the user interface, and the accuracy of the data within the 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.*
- *Ipad support is really needed!!!!*
- *Allow multiple windows open simultaneously.*
- *They make so many changes, you just get used to something and then they change it*
- *We could open the statistics in another window instead of results disappearing when we switch our search.*

Navica MLS

What I Like Best About The MLS System...

In 2012, the most popular open comments reported by Navica system users on what they liked best about the MLS system were the system's ease of use, reliability, required information to input, the visual appeal, and it's comprehensiveness. Other comments included:

- *Easy to learn and use. - very logical. Does a good job with statistics and market overviews.*
- *It's ease of use to locate past listings. Like the clone listing feature, the different reports. Like how easy it is to schedule appts, the auto approval feature for vacant properties & the feedback from the showing agent.*
- *Quick stats and CMA reports*
- *Ease of use*

Our MLS System Would Be Better If...

In 2012, the most common areas noted by Navica system users on what they felt could be immediately improved were the system's functionality, the custom brochure options, the speed of the system, and the functionality of uploading pictures.

- *It could provide better personal brochures and more statistics and wasn't crashing and slow as often.*
- *Pictures loading is very slow at times, spec sheets being more user friendly*
- *CMA would work all of the time*
- *Takes a long time to load pictures. Can take a long time to load documents. Entering the pictures is time consuming (takes much longer than our other MLS.*

Note again that some users feel the system is comprehensive and easy to use while others note functionality as something to be improved.

Paragon 5

What I Like Best About The MLS System...

In 2012, the most popular open comments reported by Paragon 5 system users on what they liked best about the MLS system were searching on the system, the system's ease of use and the tech support available. Other comments included:

- *Being able to search for listings in many different ways.*
- *Define the search criteria and wording so when searching is done by two different agents the same results come up.*
- *Ease of use and accessibility from anywhere.*
- *Easy to use, very complete. Wide assortment of items that help my business.*
- *It is always up and functional, tech support is responsive as well*

Our MLS System Would Be Better If...

In 2012, the most common areas noted by Paragon 5 system users on what they felt could be immediately improved were the customization options in reporting and brochures, the inaccurate data within the system, the support that is available, and the training made available to the users. Other comments included:

- *I would like more control over customizing my reports especially the ones i send along to clients. I would like our MLS to be more Mobile friendly*
- *Input was more accurate from agents.*
- *Mapping and client search features were easier and more accurate.*

- *There are numerous views to select but I would like an easy way to customize and save that view. Especially spreadsheets. Why in the All Fields View do you eliminate the icons for map, taxes, docs, etc.?*

Training, noted as an area to be improved, is most likely an MLS issue not a system issue. Likewise “tech support” being noted as a strength, may be a MLS vendor strength or an MLS service strength depending on how the service is provided.

Rapattoni MLS

What I Like Best About The MLS System...

In 2012, the most popular open comments reported by Rapattoni MLS system users on what they liked best about the MLS system were praise for the photos and hot sheets, positivity in terms of support and training offered, the extensive searching, and the system’s ease of use. Other comments included:

- *Huge amount of photos and that they can be viewed as a slide show or one photo at a time*
- *The hot sheets where I can save searches for specific areas or clients.*
- *It saves your recent searches so that you do not have to reenter is you need to refer back.*
- *Love that you can look at searches on map then add where schools might be or pendings and solds are in conjunction with searched listings.*
- *The ease of use and the client portal search system.*

Our MLS System Would Be Better If...

In 2012, the most common areas noted by Rapattoni MLS system users on what they felt could be immediately improved were the slow uploading of pictures, the speed of the system, the system’s ease of use, and the mobile aspect of the MLS. Other comments included:

- *You could upload more than 5 pictures at a time.*
- *Speed at uploading pictures!*
- *It was faster. I don't like the way it works with my iPad. Very slow on my PC.*
- *It's usage was easier, more fluid in keeping with current easy "touch" buttons, etc.*

- *I also wish the MLS worked better on an iPad or with browsers other than IE. A mobile application is a must.*

“Support and training offered” were noted as strengths. These are likely “MLS strengths, not MLS system strengths.

TEMPO 5

What I Like Best About The MLS System...

In 2012, the most popular open comments reported by Tempo 5 system users on what they liked best about the MLS system were the access to the system's data, the accuracy of the data within the system, the system's ease of use, as well as the support and training offered by the MLS. Other comments include:

- *The ability to quickly view/access office listings and hotsheet info from the home page.*
- *Ease of use for most searches, and when I email listings to my clients, they seem to like the information provided.*
- *Ease of use. Support by staff and tech department. Vision of MLS and always trying to give agents new apps and programs to support their business.*
- *Easy to use, and an abundance of "training" made available to insure Brokers learn and can use beneficially for their business.*

Our MLS System Would Be Better If...

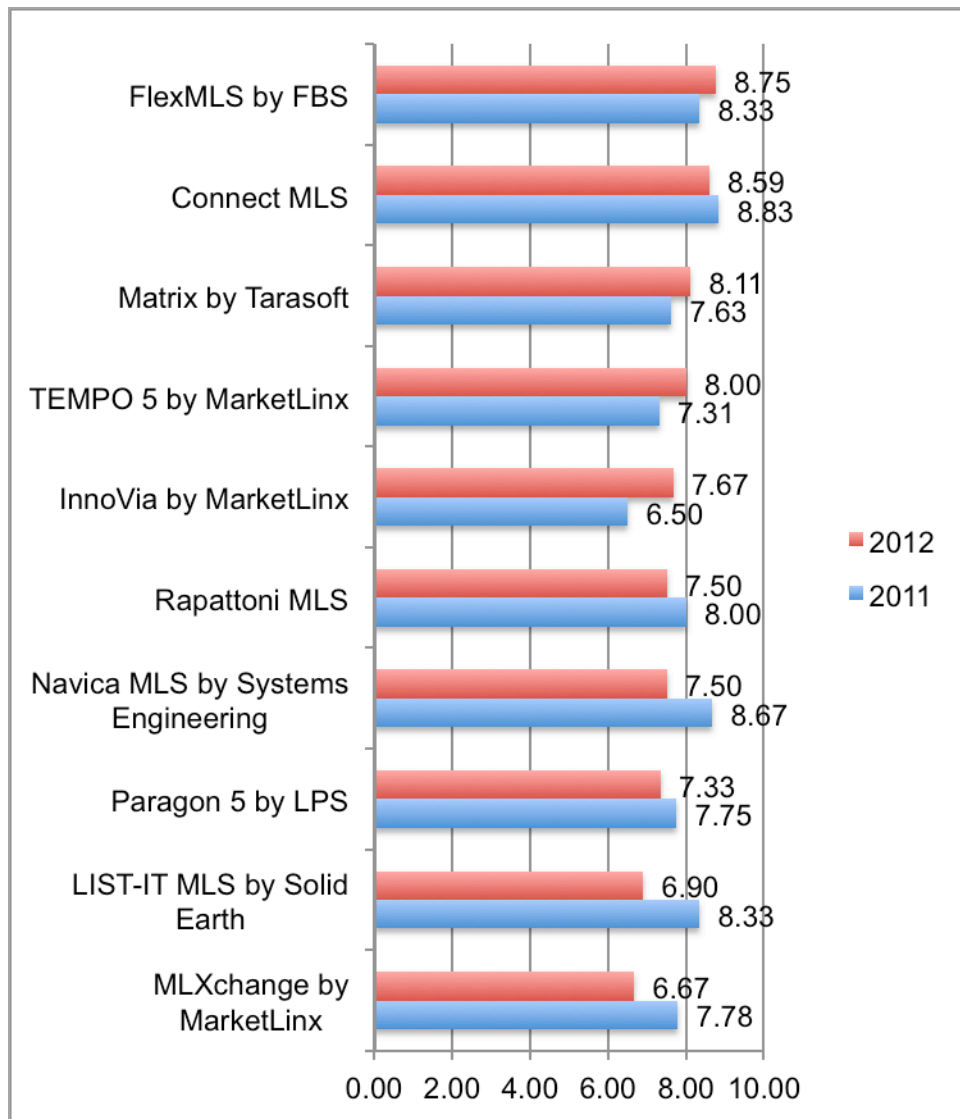
In 2012, the most common areas noted by Tempo 5 system users on what they felt could be immediately improved were regarding the interface and the system's compatibility, searching on the system, and the accuracy of the data on the system. Other comments included:

- *it was compatible with chrome/mac,*
- *...the user interface followed general internet website standards as opposed to having all sorts of coded overrides.*
clients were able to make search criteria changes themselves on their client gateways
- *Cloning a listing was available, easier way to find property area, easier way to manage listings, easier way to search listings, better visual presentation*
- *Editing listings was more intuitive. Revising map search was easier.*

It is interesting to note that data accuracy was listed as both a strength and a weakness. While MLS systems can and do impact data accuracy it can also be influenced by how an MLS is overseeing and enforcing data accuracy.

MLS System Ratings – Overall Staff Satisfaction

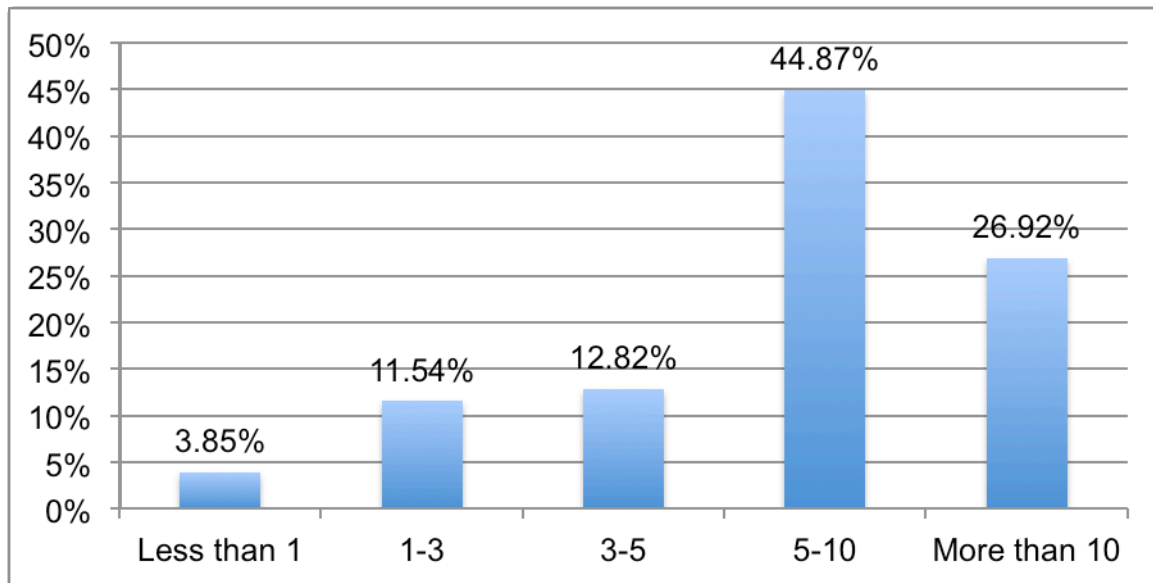
The chart below show ratings by staff on the questions “What is your overall satisfaction with the MLS system”, comparing 2011 ratings to 2012.



Note: These ratings are based on a scale of 1 to 10. Ratings of 1 were eliminated for all systems for the weighted ranking.

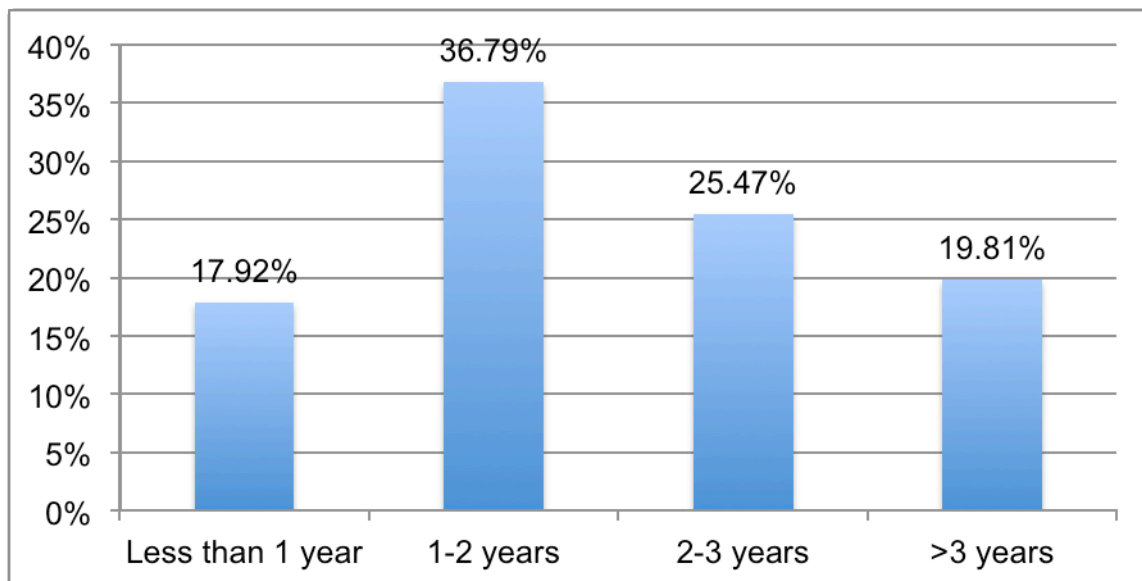
Staff Questions - Details

How long have you been with your current vendor?



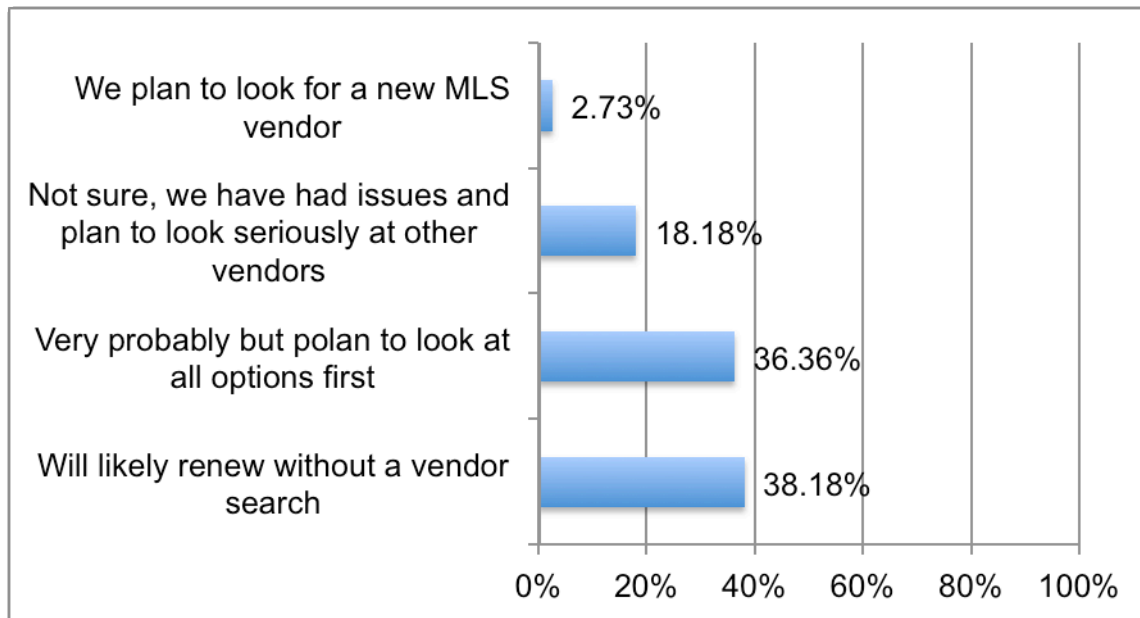
- 71.79% of the MLSs taking part in the survey have been with their current vendor for 5 more years. 26.92% have been with their vendor for over 10 years.
- 15.39% have been with their current vendor for 3 years or less.

When does your MLS contract expire?



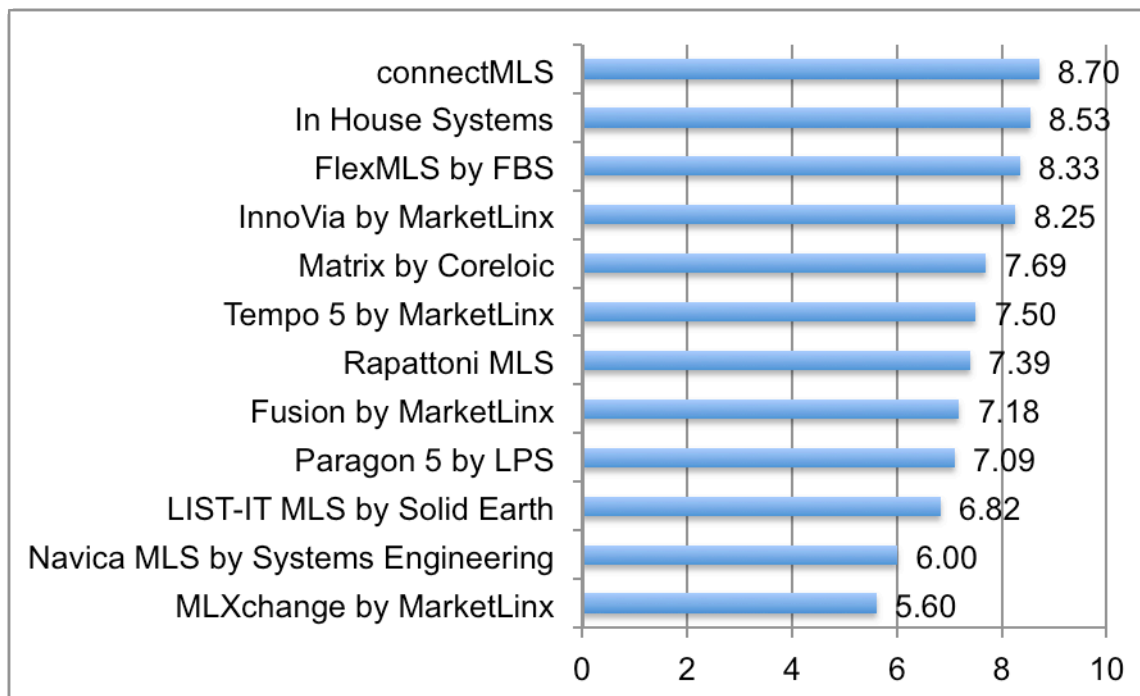
- 54.71% of the MLS contracts of those participating in the survey expire in less than 2 years.

What is the likelihood you will renew with your current vendor?

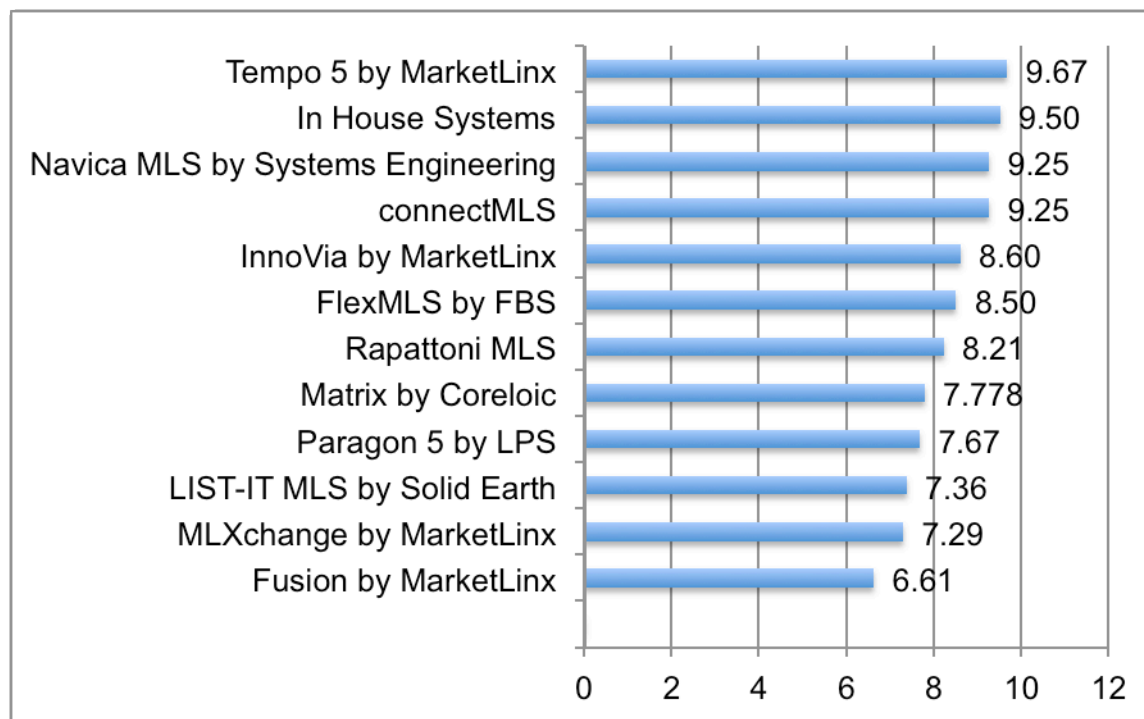


- Over 20% indicate they are planning to do a serious review of technology.

On a scale of 1 to 10, rate how well you believe your vendor's MLS system upgrades keep your MLS system on the leading edge of technology. (1 is "they don't" and 10 is "perfectly")

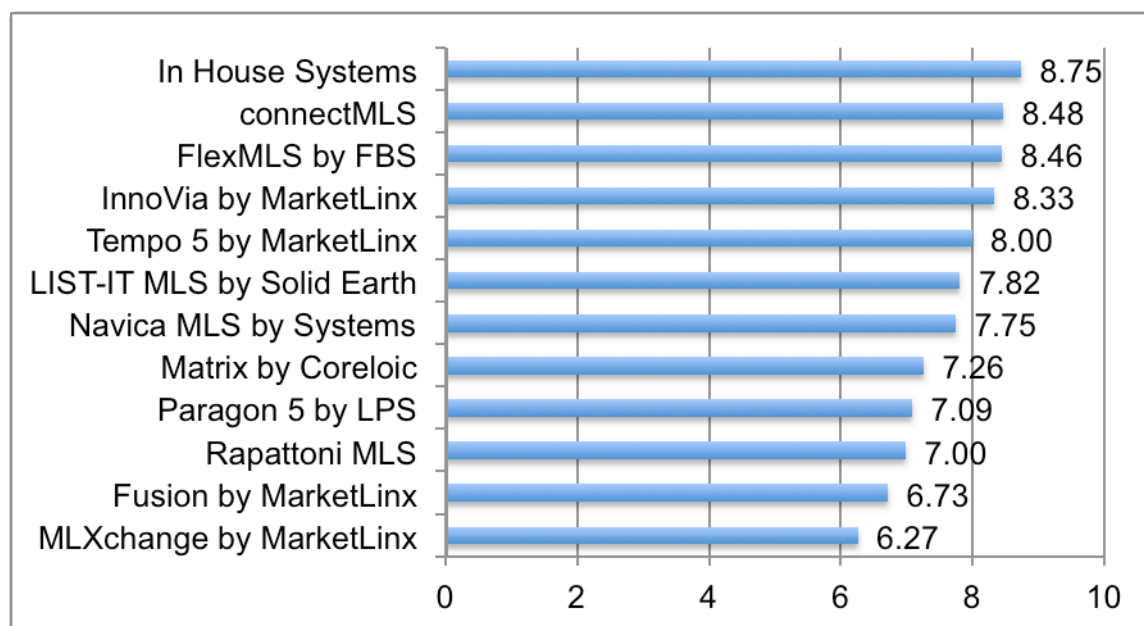


On a scale of 1 to 10, how would you rate your satisfaction with the customer service you receive from your MLS vendor?

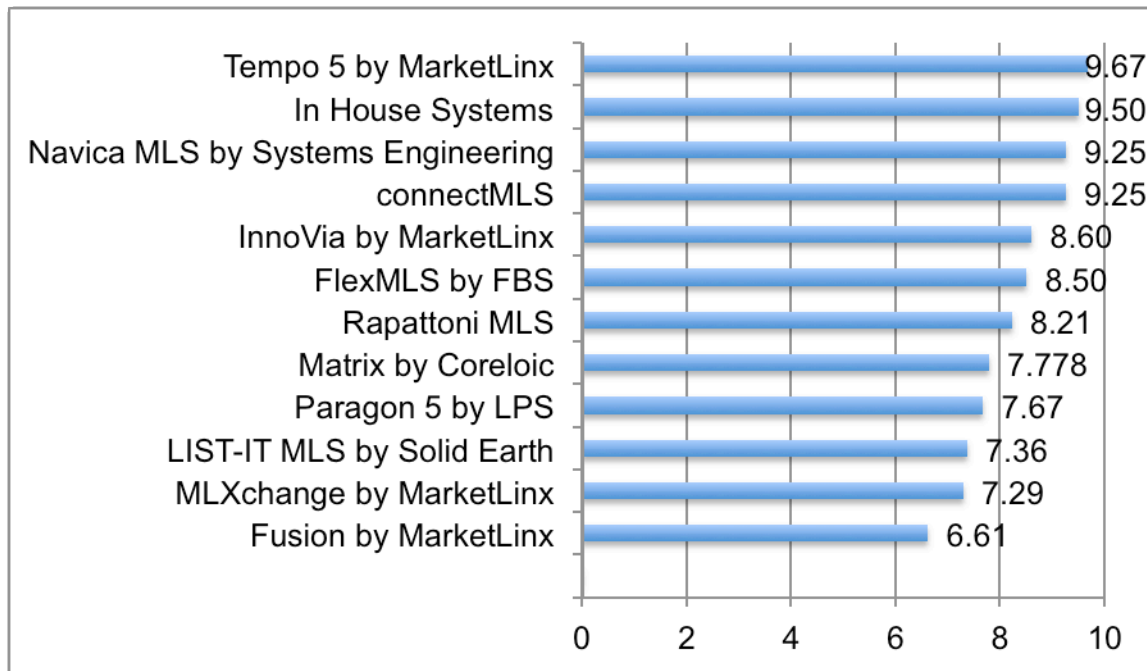


- The majority of ratings by staff on vendor customer service were very strong.

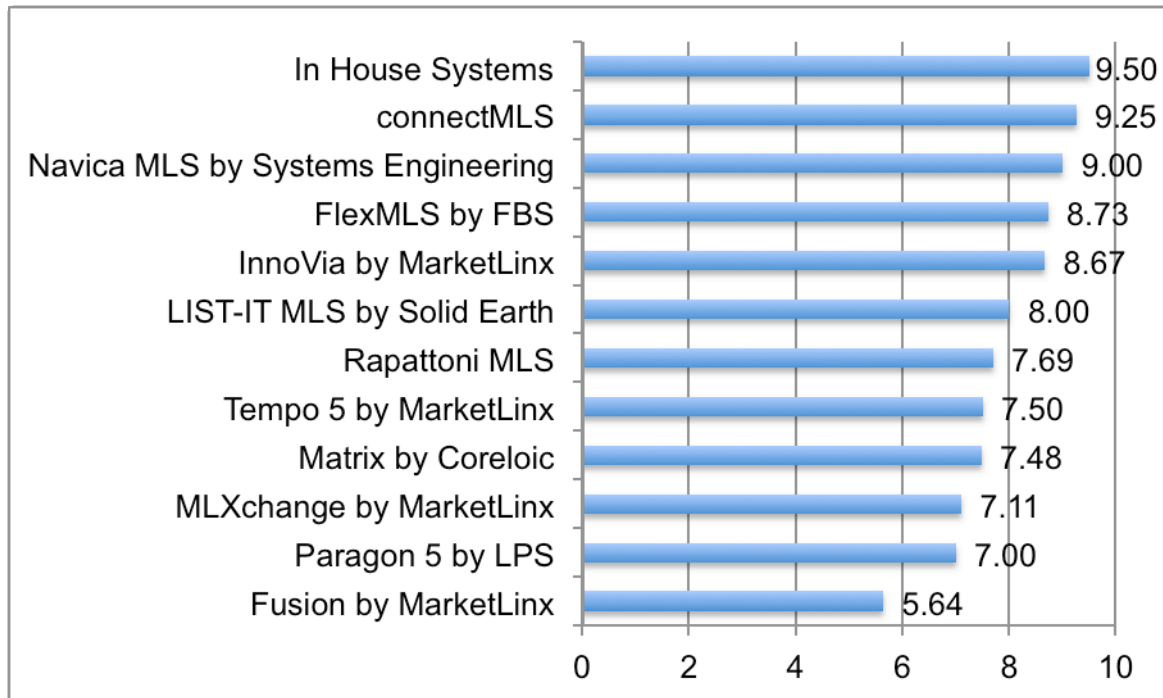
On a scale of 1 to 10, rate your MLS vendor on their willingness and ability to implement suggested changes to the MLS system.



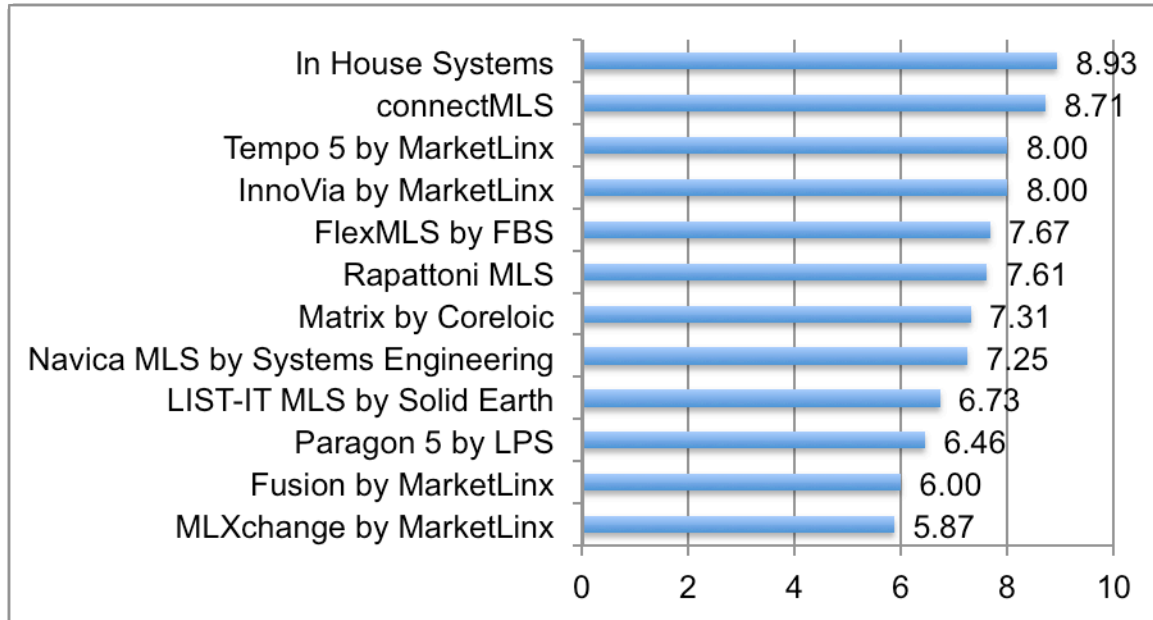
On a scale of 1 to 10, how would you rate your satisfaction with the customer service you receive from your MLS vendor? (1 is not satisfied at all and 10 is totally satisfied)



On a scale of 1 to 10, rate your MLS vendor on how well they resolve system issues when they do come up.

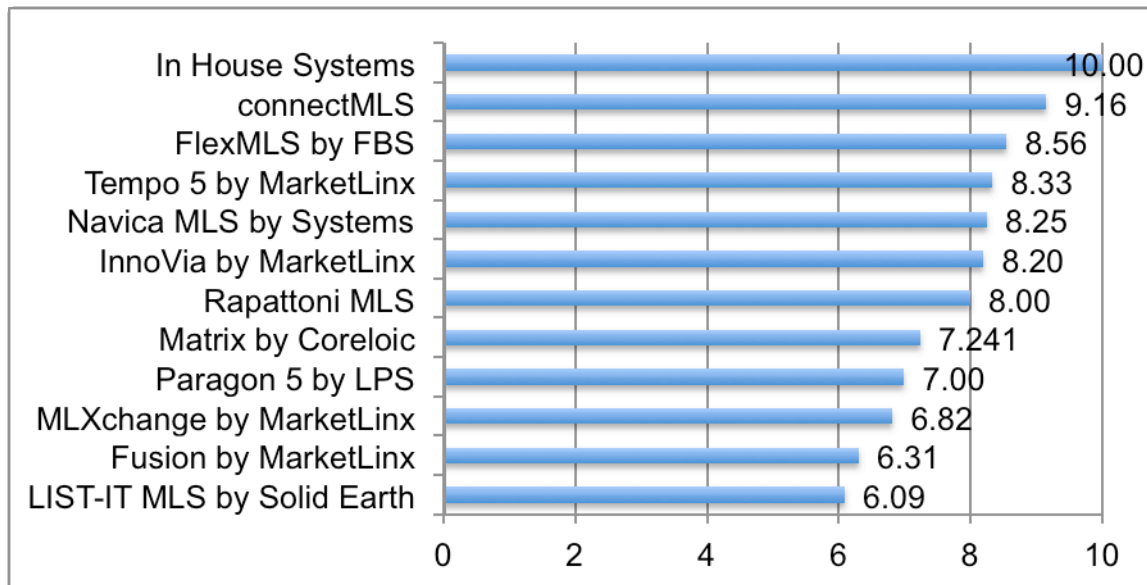


On a scale of 1 to 10, how would you rate the quality of MLS upgrades and releases in terms of quality control - debugging before upgrades? (1 is very poor and 10 is excellent)

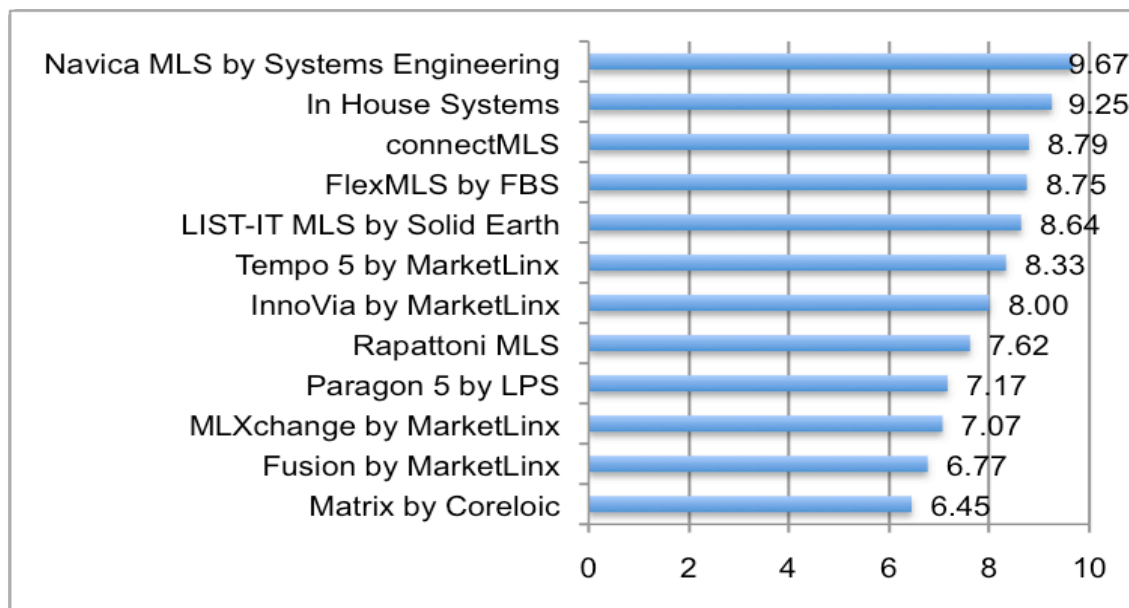


- There was a wide variance in the responses on this question regarding the quality of MLS upgrades in terms of debugging software before releasing an upgrade.

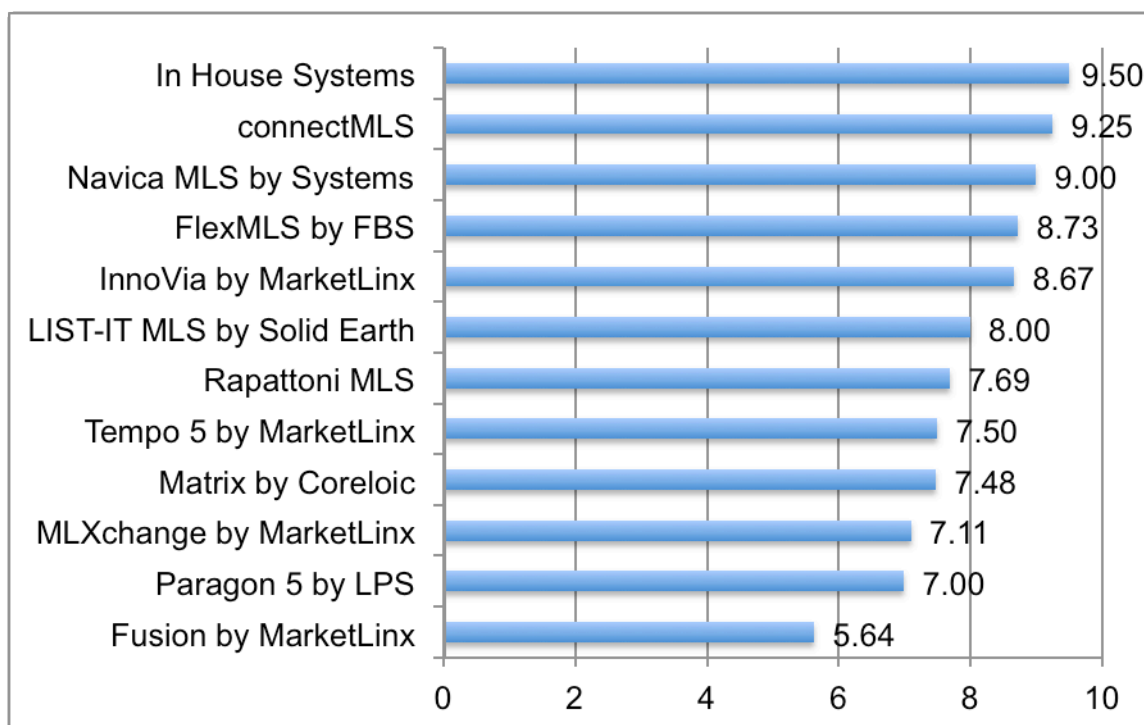
On a scale of 1 to 10, how would you rate the responsiveness of your MLS vendor to complete administrative system change requests? For example: property sheet changes, additions to fields, etc.



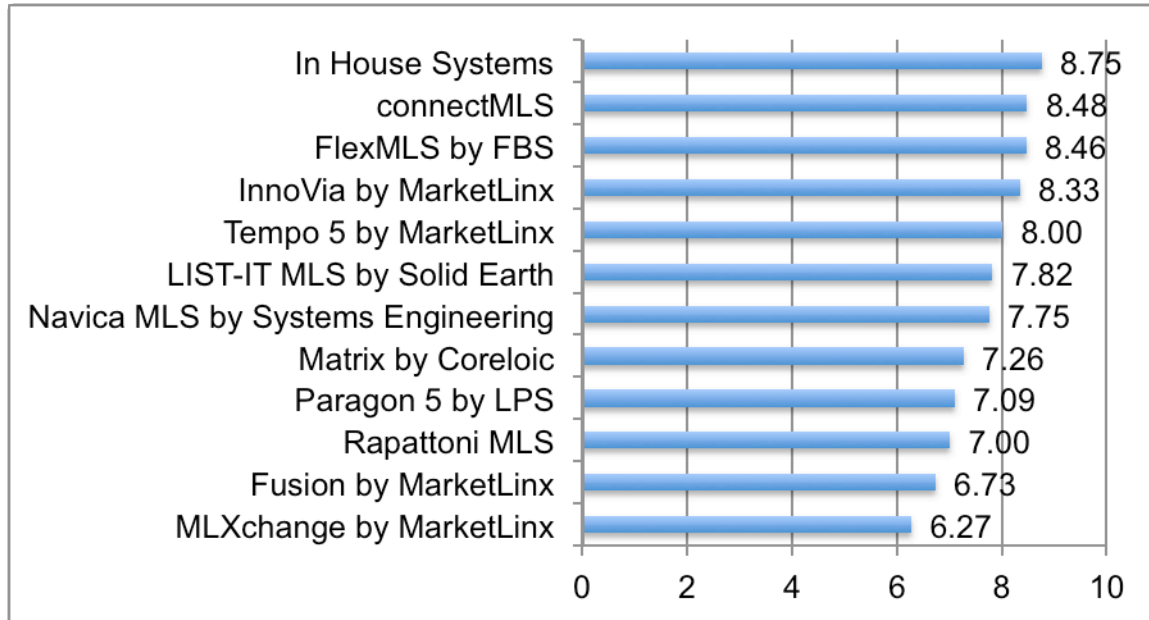
On a scale of 1 to 10, rate your satisfaction with the quality of the initial MLS system installation?



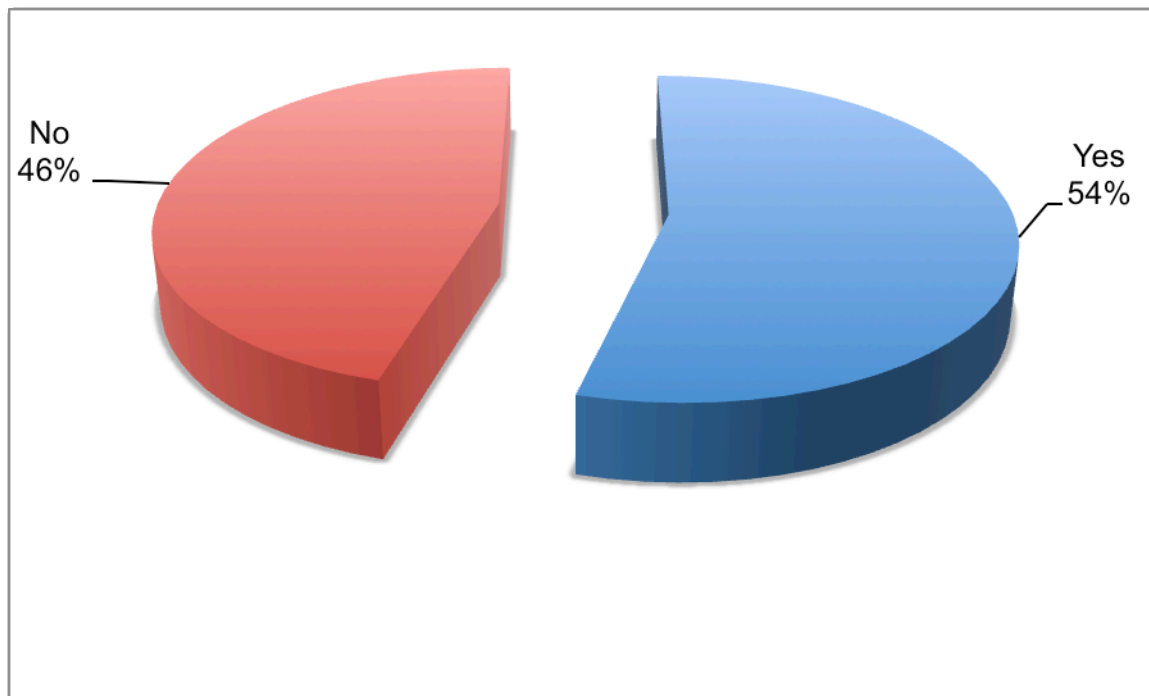
On a scale of 1 to 10, rate your MLS vendor on how well they resolve system issues when they do come up. (1 is very poor and 10 is excellent)



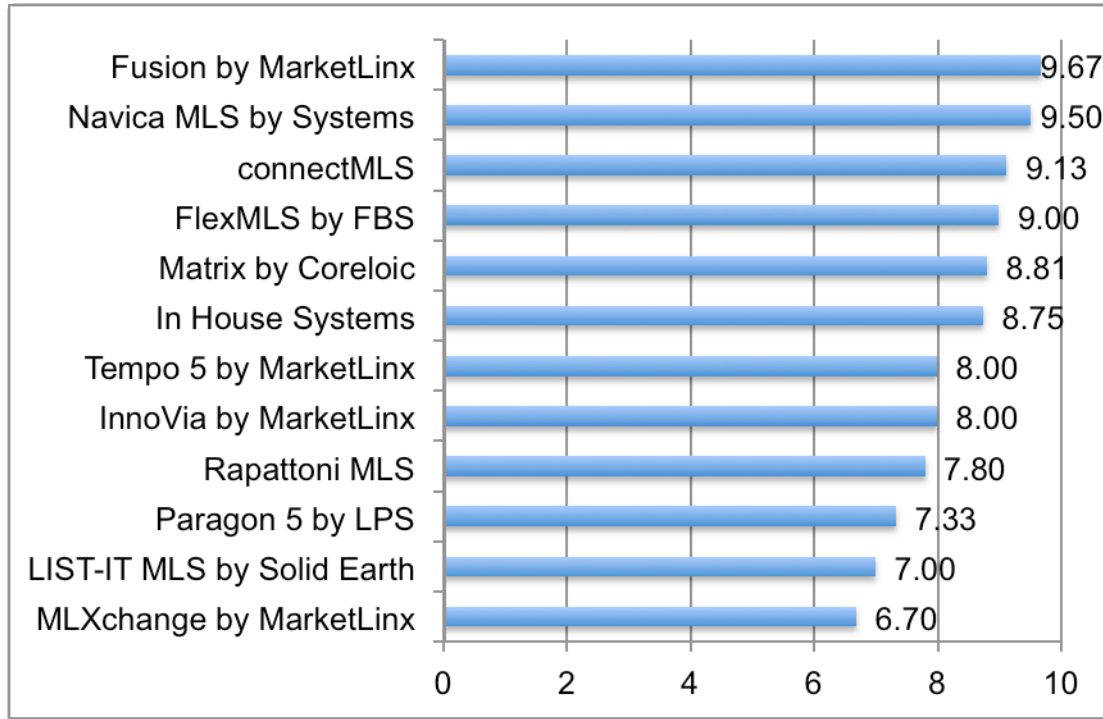
On a scale of 1 to 10, rate your MLS vendor on their willingness and ability to implement suggested changes to the MLS system. (1 is never happens and 10 is always happens)



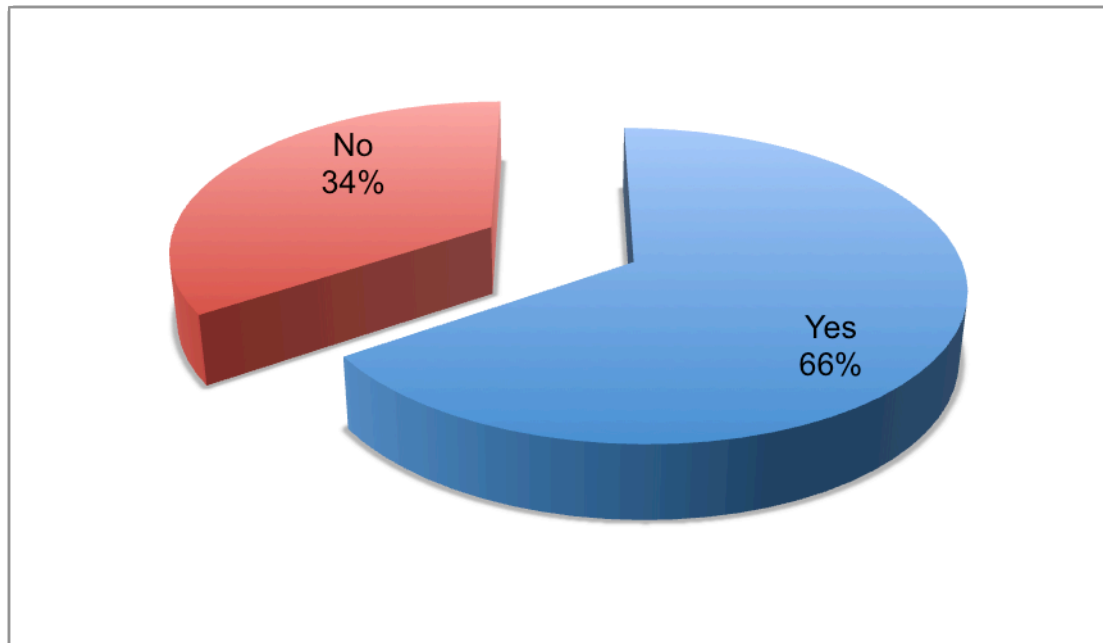
Does your MLS vendor provide help desk phone support to your members?



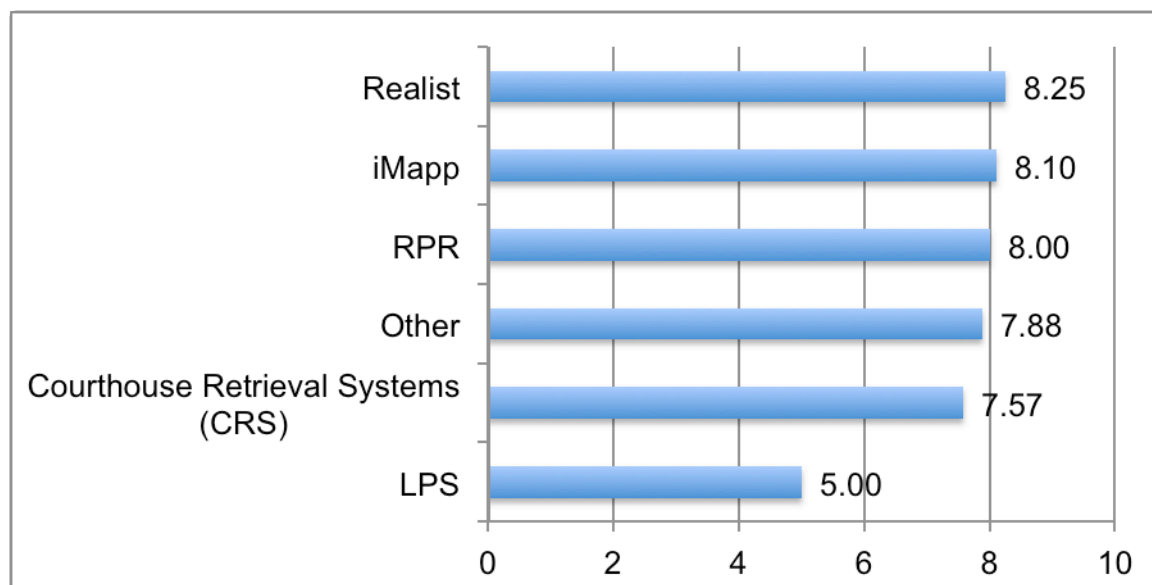
On a scale of 1 to 10 rate the level of service provided to your members by your MLS vendor's help desk. (1 is bad service and 10 is outstanding service)



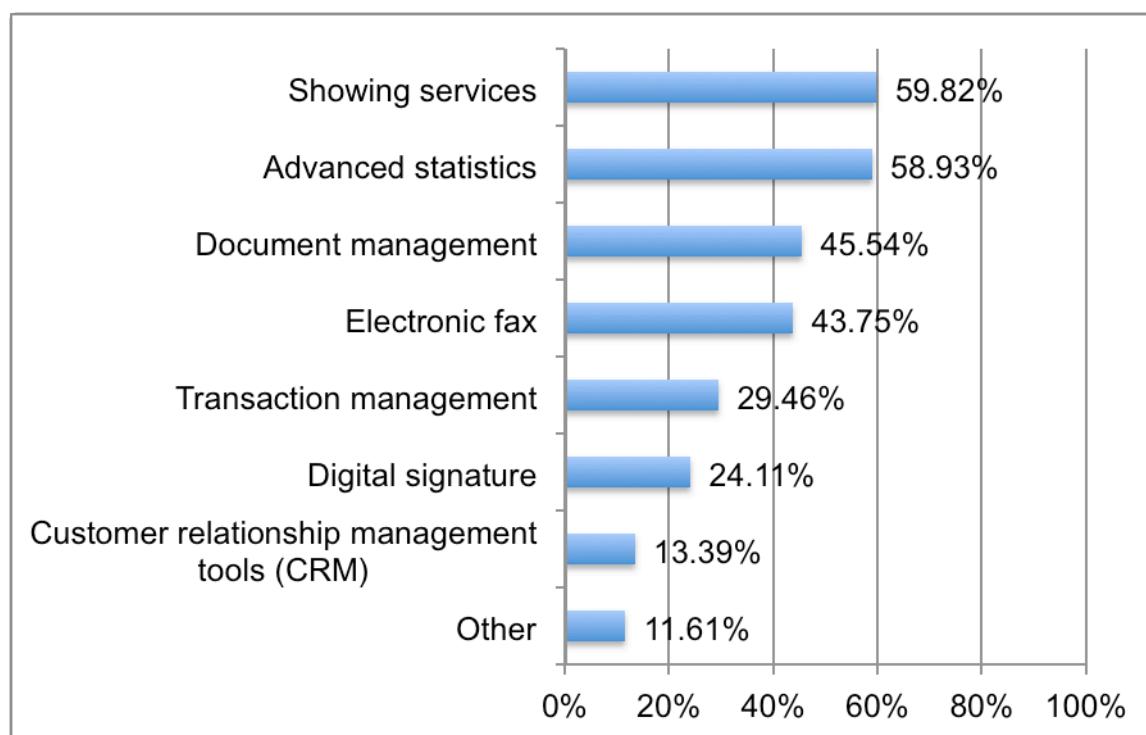
Do you use a 3rd party public records product?



On a scale of 1 to 10, how would you rate your level of satisfaction with your 3rd party public records provider? (1 is the lowest, 10 is the highest)



Which of the following services do you offer through your MLS at no additional fee? (check all that apply)



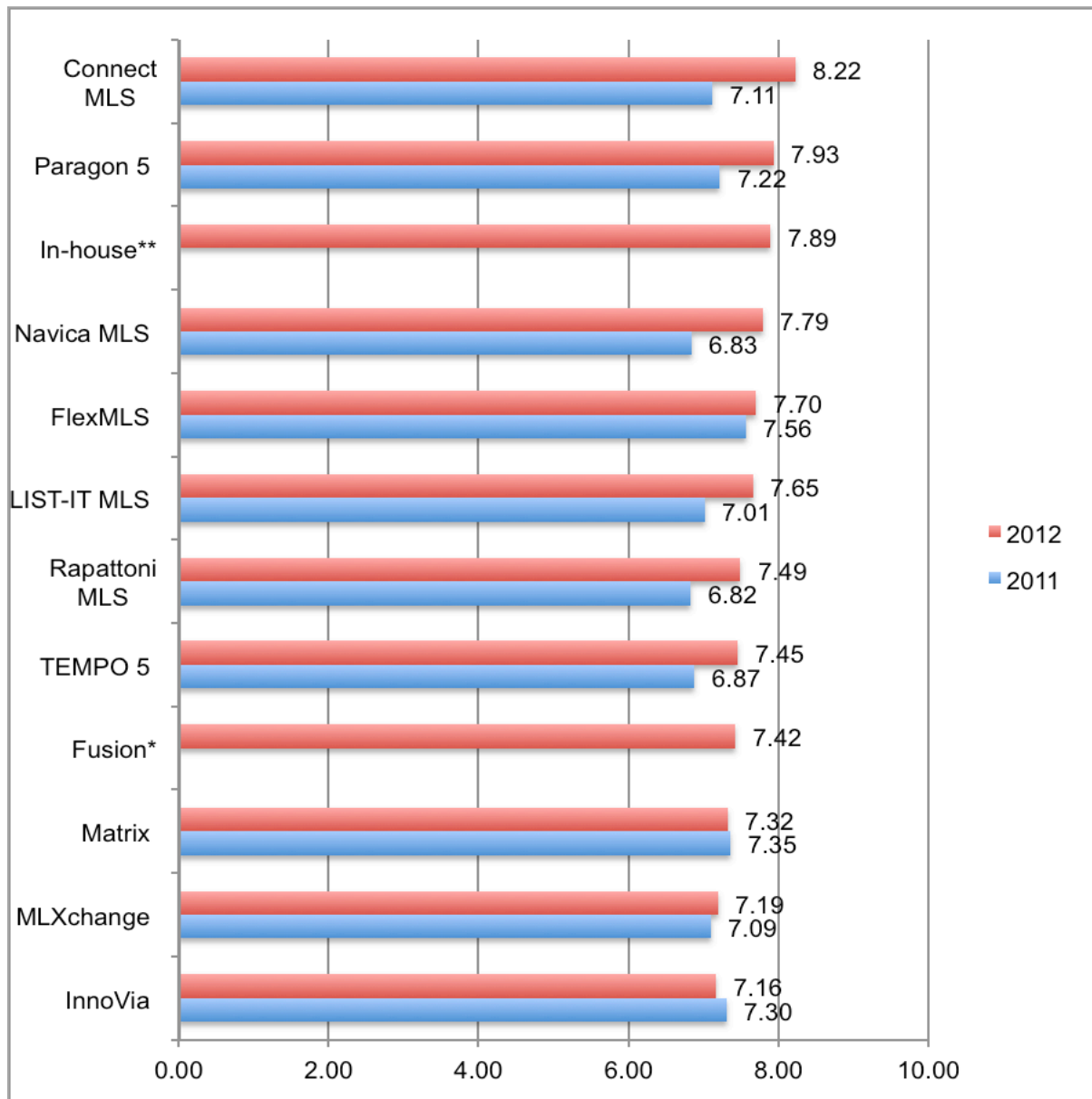
- Showing services top the list of services offered by the participating MLSs followed by advance statistics, document management and electronic fax.

User Question - Details

MLS System Ratings – Overall User Satisfaction

The following chart shows how each vendor was rated by the users when asked the following question:

On a scale of 1 to 10, with 10 being the highest rating, what is your overall satisfaction with your MLS system?



Note: These ratings are based on a scale of 1 to 10. Ratings of 1 were eliminated for both years for all systems for the weighted ranking.

* Fusion – was not rated on 2011 survey so no comparison shown

**Inhouse systems – the systems rated in 2011 are different from those rated in 2012 so a comparison between the two years is not shown.

Ratings Comments

It is interesting to note that users and staff do not see things the same way. The following chart shows the order in rating by Users and Staff.

USER RATINGS	STAFF RATINGS
Connect MLS	Flex MLS
Paragon 5	Matrix
Navica MLS	Connect
Flex MLS	Tempo 5
LIST-IT MLS	Innovia
Rapattoni MLS	Navica MLS
Tempo 5	Rapattoni MLS
Matrix	Paragon 5
MLXchange	LIST-IT MLS
Innovia	MLXchange

What is important to an MLS staff person may be totally different from what a user wants to see in their MLS system. This is very apparent from the differences in ratings we always see between staff and users on the very same system. This is why WAV Group stresses the importance of obtaining a balanced response on all research, which means including the staff and users. It is also important not to just judge a vendor and system from a single question. Included later in this report is a breakdown of all questions that asked users to rate their system on a scale of one to ten. We encourage you to review each different system area and rating to get a more balanced picture of user ratings.

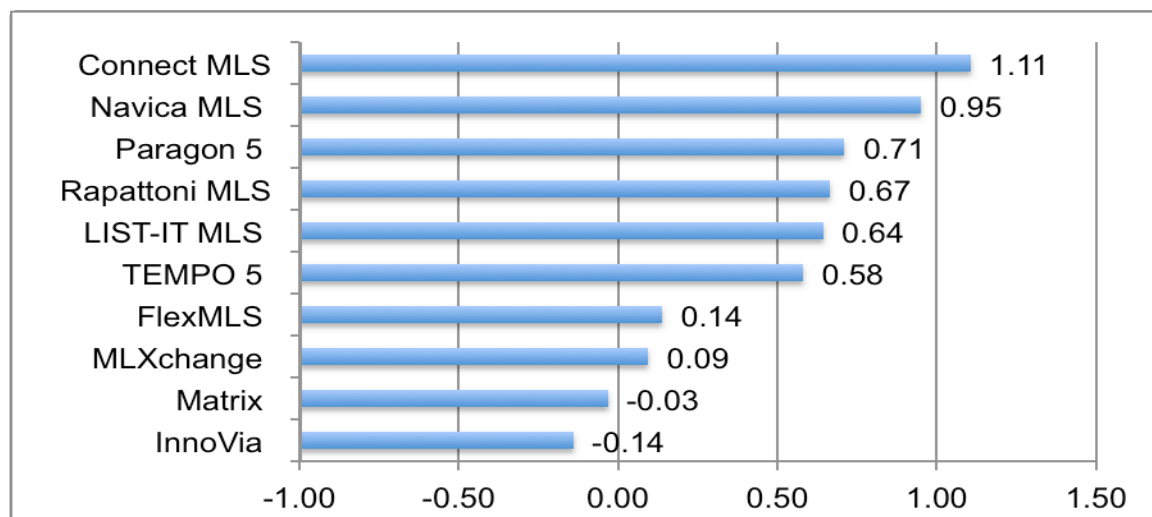
- *Ratings for almost all MLS systems were higher in 2012. It is hard to explain the improved ratings but good to see nonetheless.*
- *Keep in mind that the number of users rating each system was not equal and this can impact results. Results are better used to see what users feel are strengths*

and weaknesses of specific system features than as an indication of which system is better or worse.

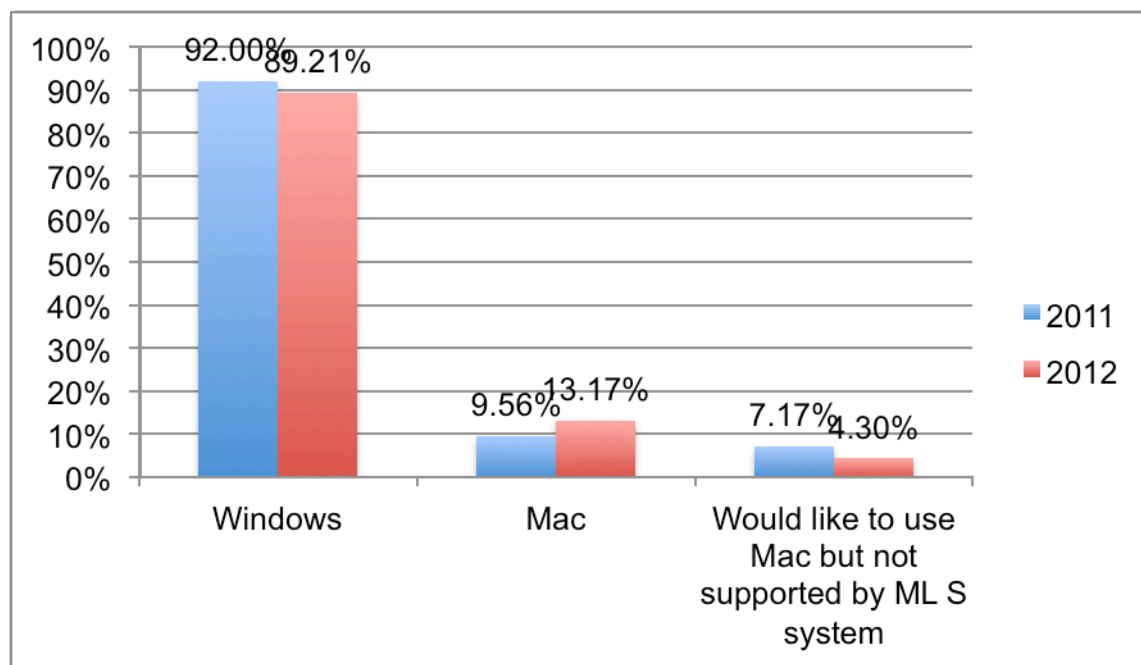
- connectMLS, a vendor with 2 accounts currently, MRED and San Antonio, showed the highest rating and also showed the biggest jump in ratings with an increase of 1.11. It is important to note that MRED was the only MLS that participated this year for connectMLS so the ratings on the chart are for this one MLS only though with about 10% of their members participating in the survey these results are still significant.*
- Navica MLS had a good rating and was second highest in terms of improved ratings however it must be noted this was with only 34 people responding. See the chart in the beginning of the report for the number of respondents for each MLS system.*
- Paragon 5 had a strong rating in 2012 and improved their rating by .71 compared to 2011.*
- Rapattoni, LIST-IT MLS and Tempo 5 all showed an increase in their ratings over .5.*

Change in “Overall Satisfaction” Ratings From 2011 Survey

The chart below shows the changes in ratings for each vendor from our 2011 survey.

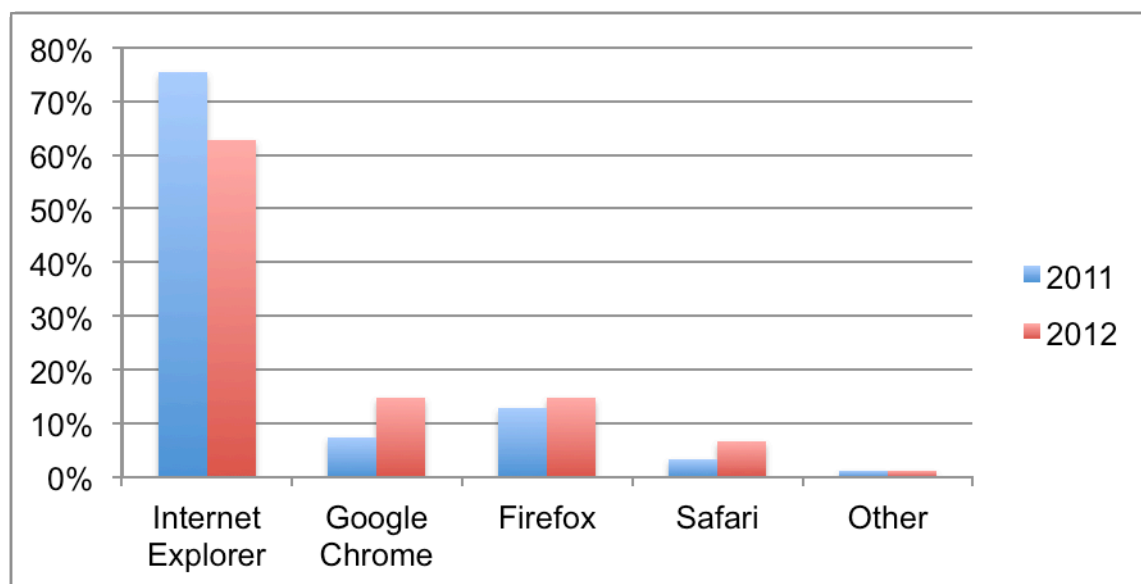


What personal computer platform do you use?



- There has been a slight drop in Windows use since 2011 and an increase in Mac use.

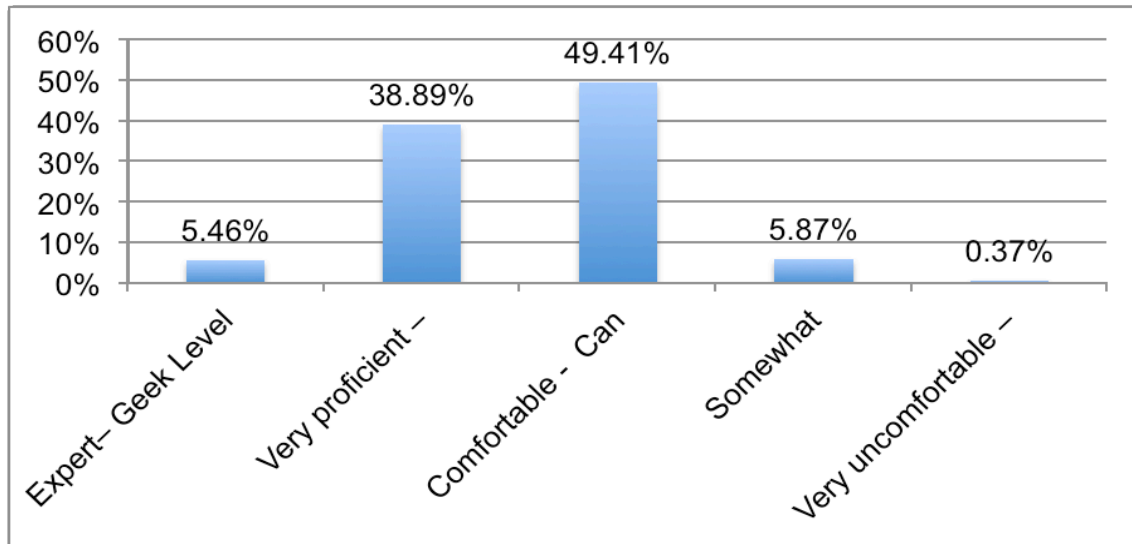
What is the primary browser you use?



- There was significant drop in Internet Explorer use with corresponding increases in Google Chrome, Firefox and Safari.

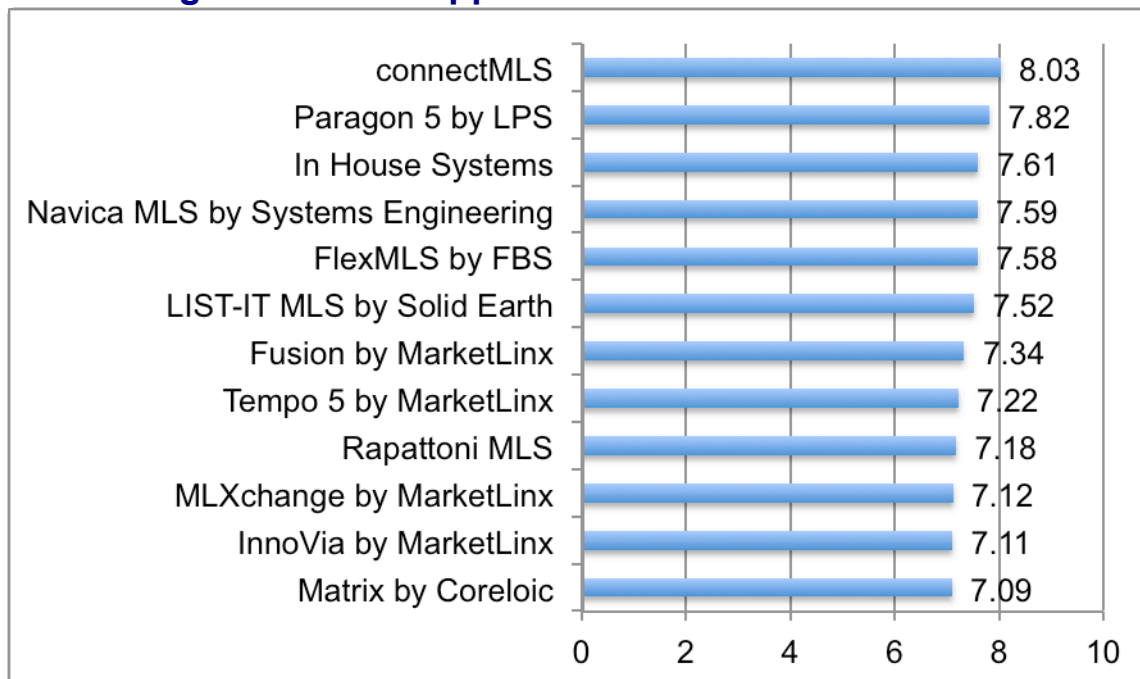
User Comfort Level With Technology

As noted by the chart below, very few users report they are uncomfortable with technology anymore. Only 6.24% report they are somewhat uncomfortable with technology with over 40% reporting they are proficient or an actual geek!

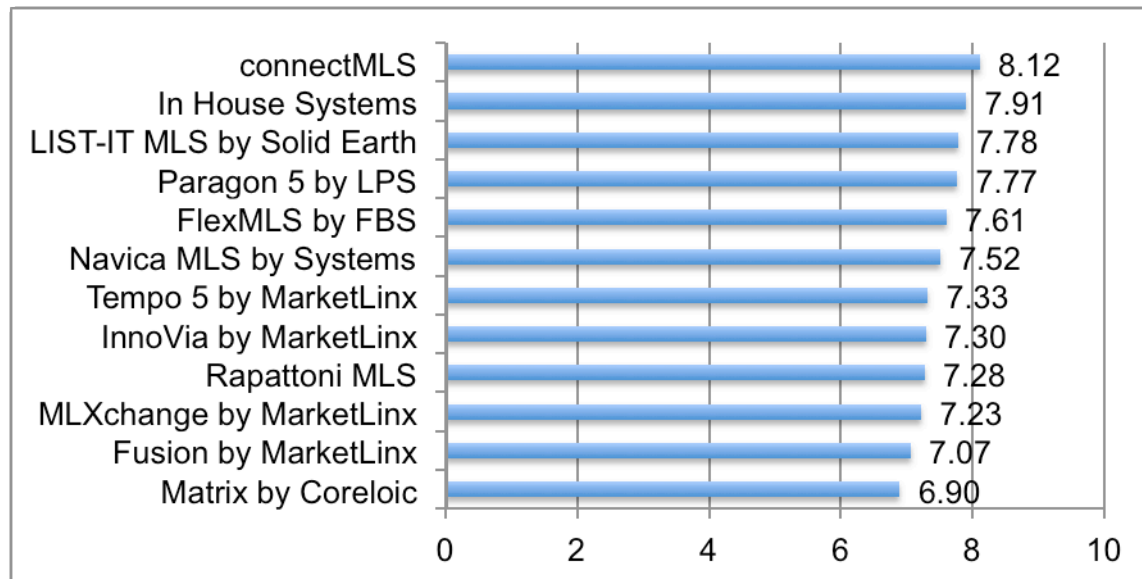


- Comfort with technology is really not an issue anymore with the vast majority of users at least comfortable with basic technology use.

On a scale of 1 to 10, how would you rate your MLS system in terms of its design and visual appeal?

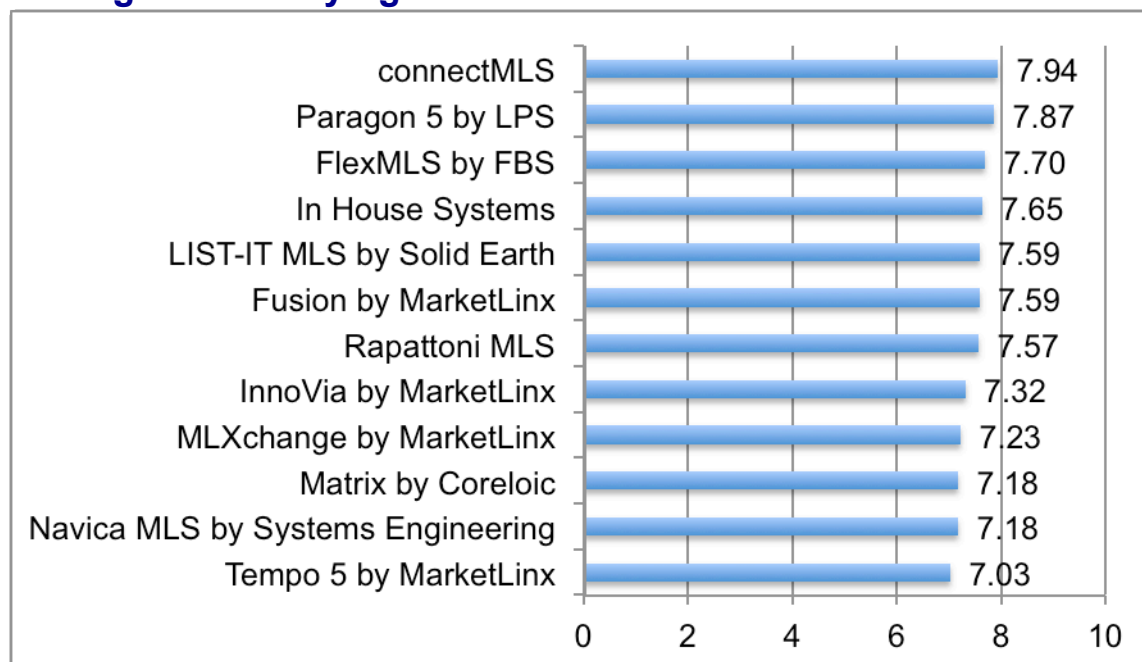


On a scale of 1 to 10, how would you rate your MLS system in terms of its ease of use?

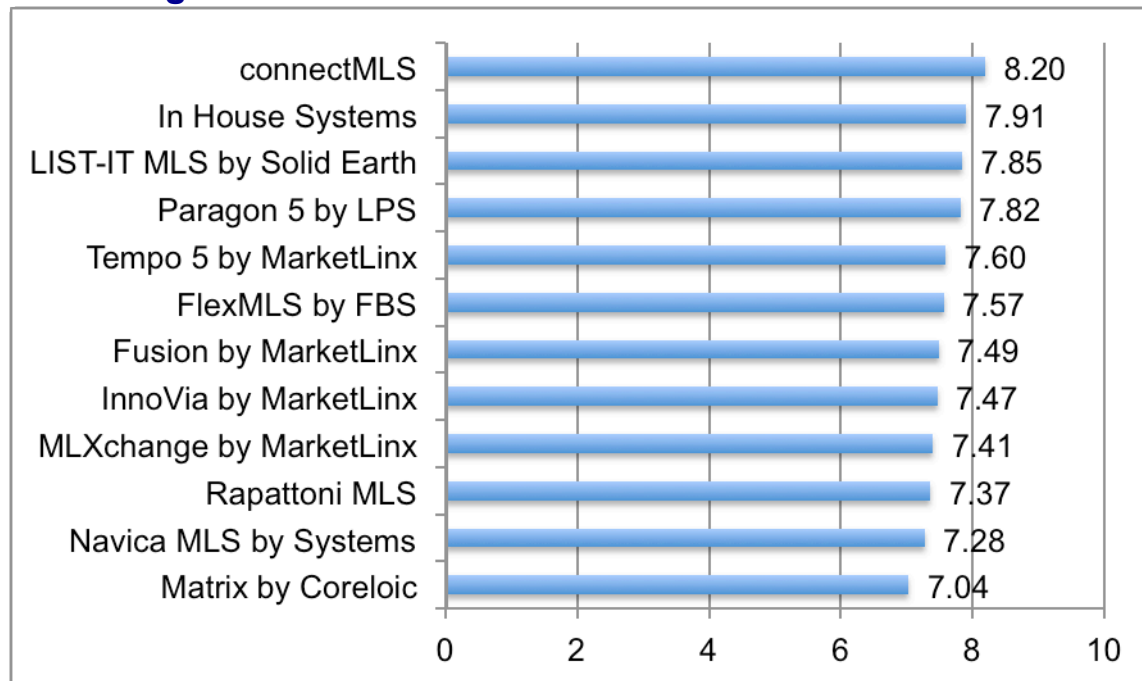


How would you rate your system on the following feature - functional areas?

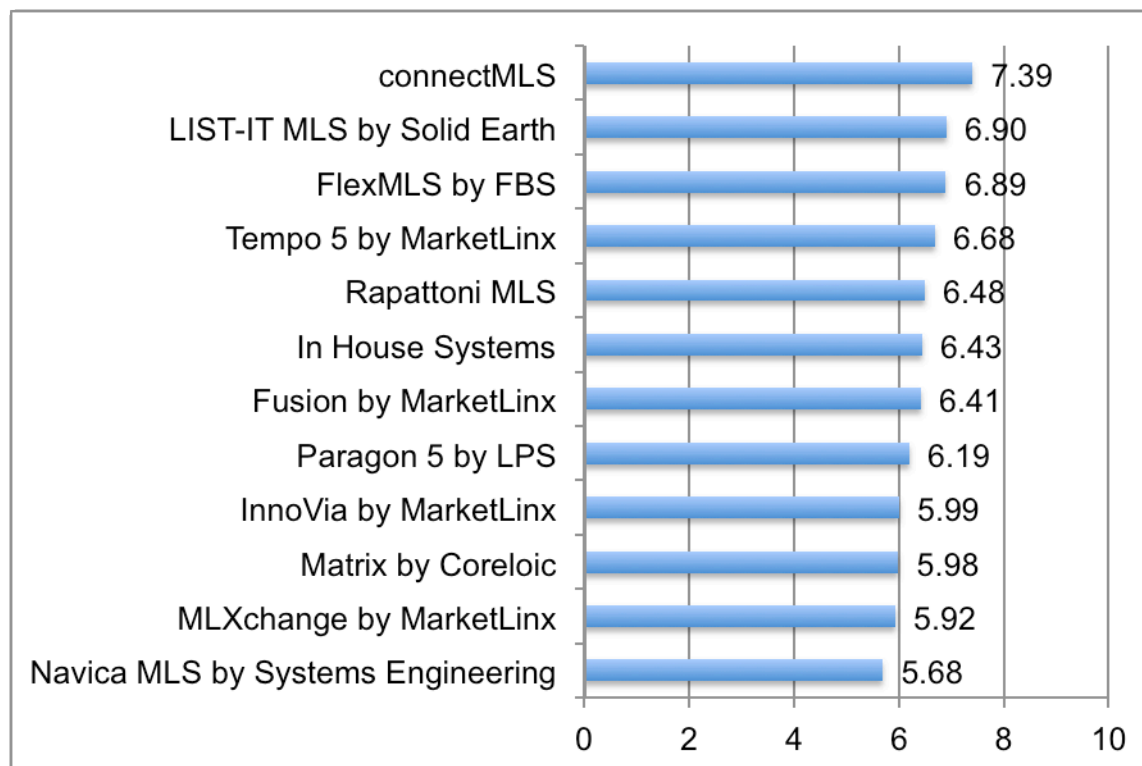
Adding and modifying



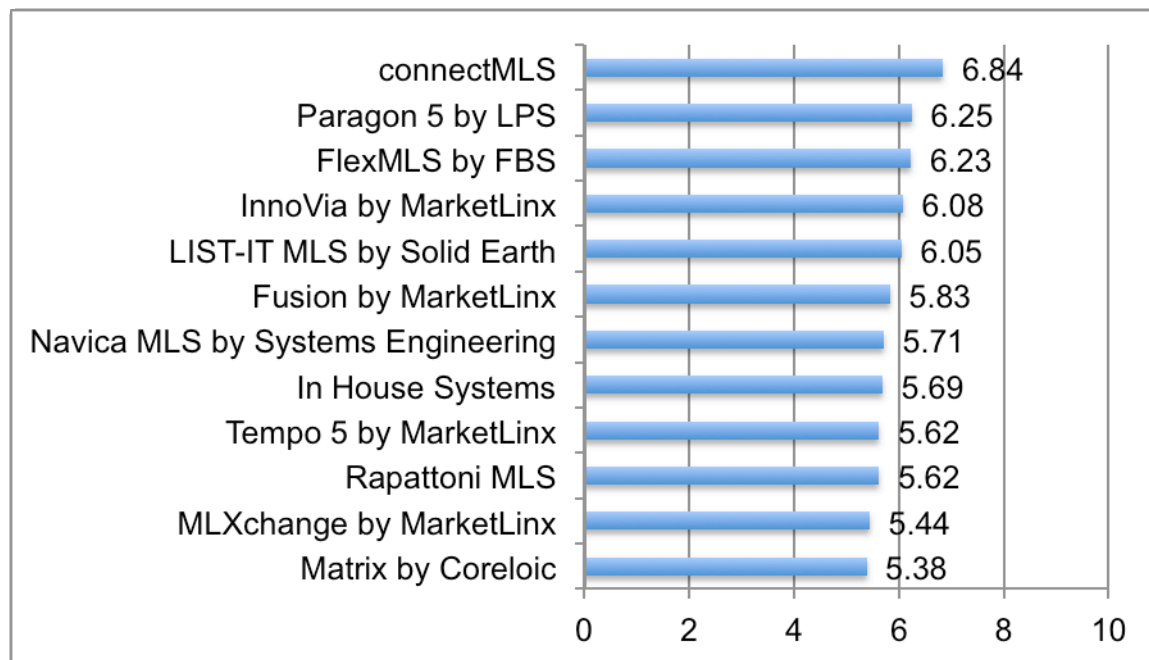
Searching



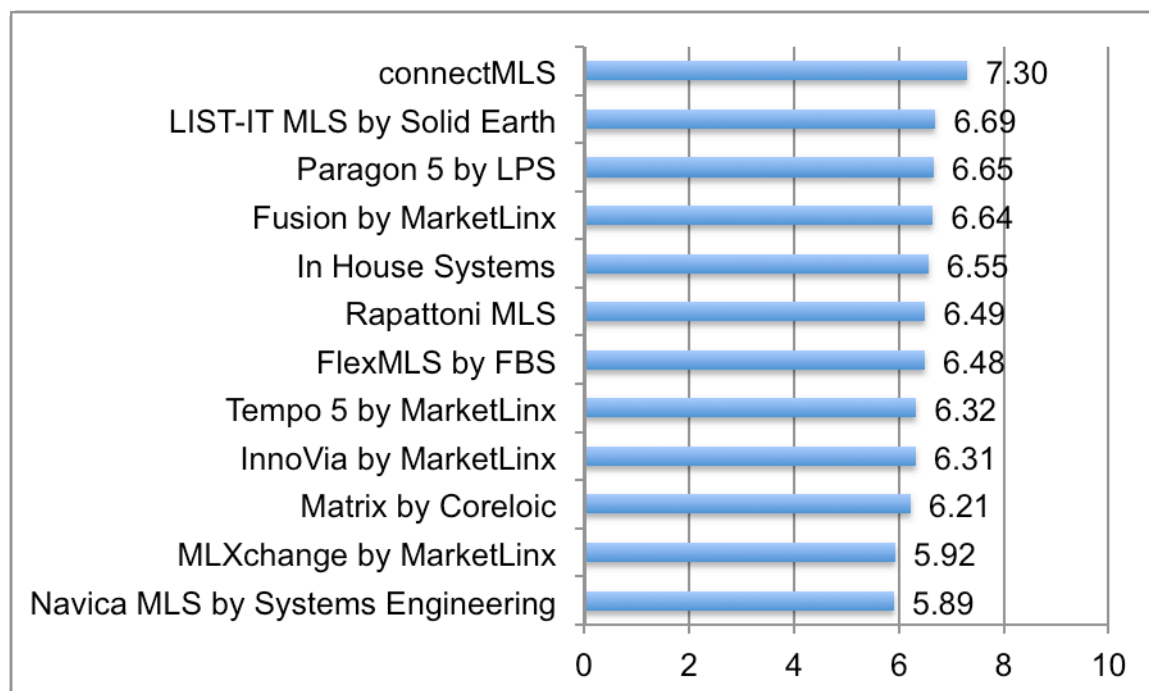
CMA



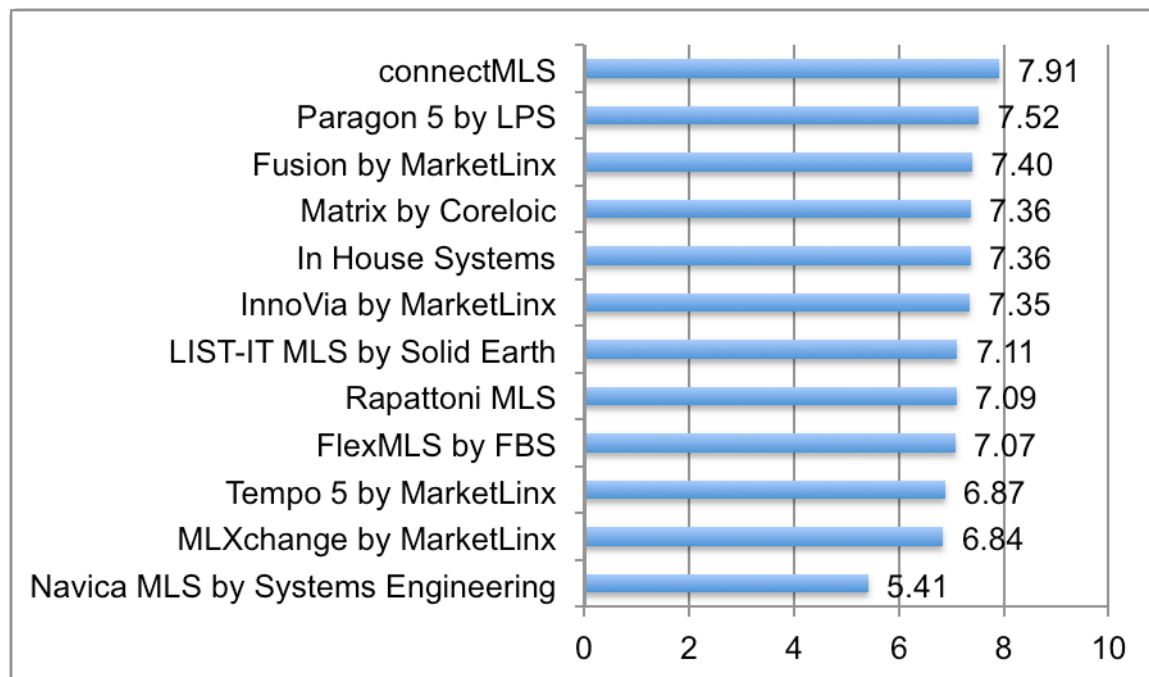
Creating personalized/branded listing brochures



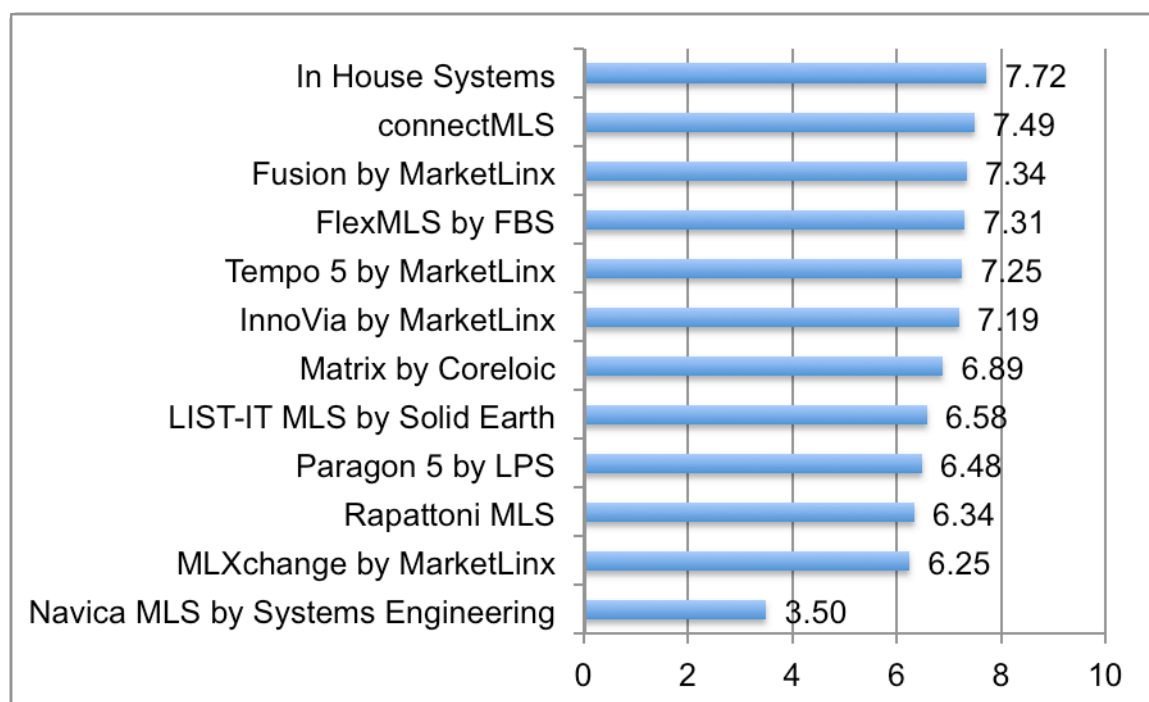
Statistical report functions



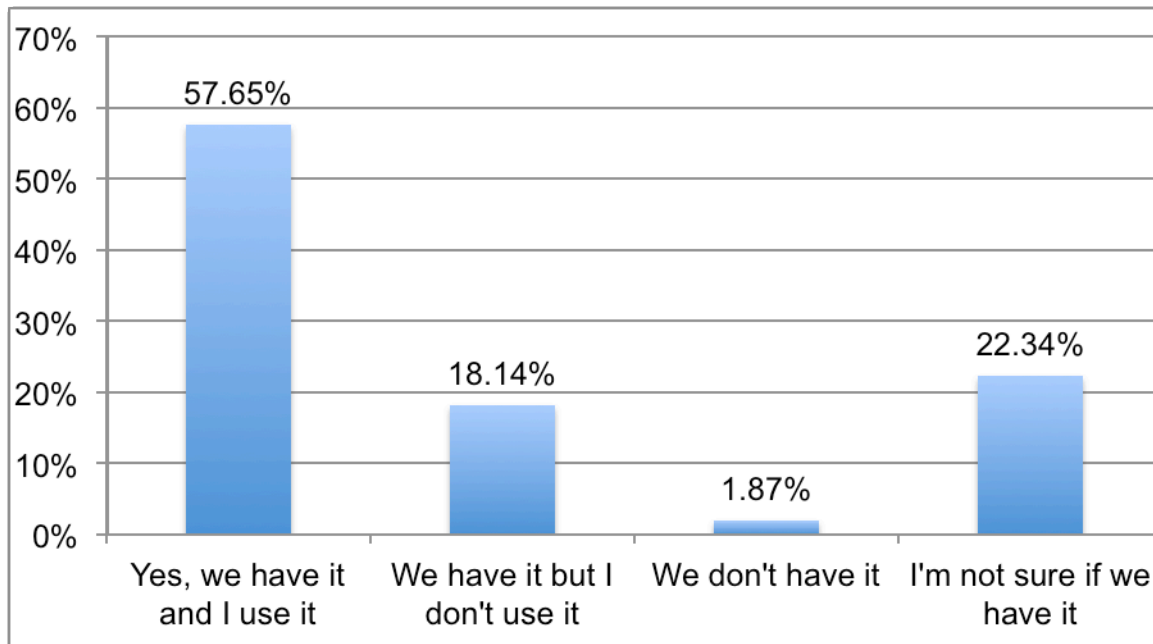
Ease of loading and managing photos on the MLS system



Tax and public record searching

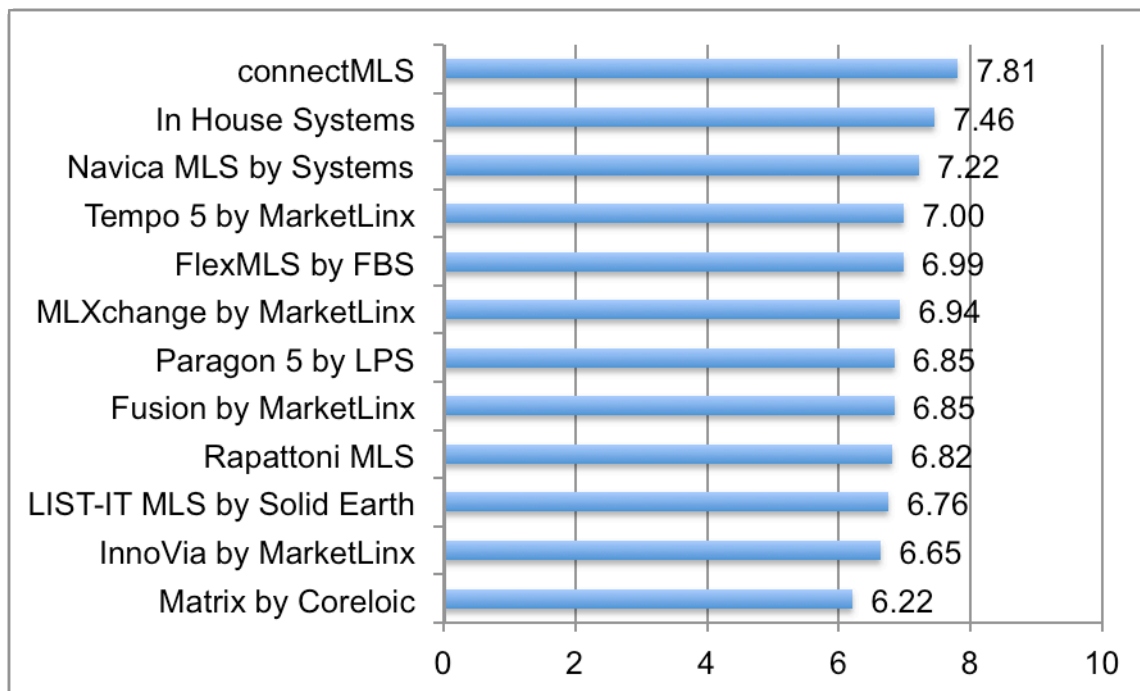


Do you have and use Auto Search on your MLS system?

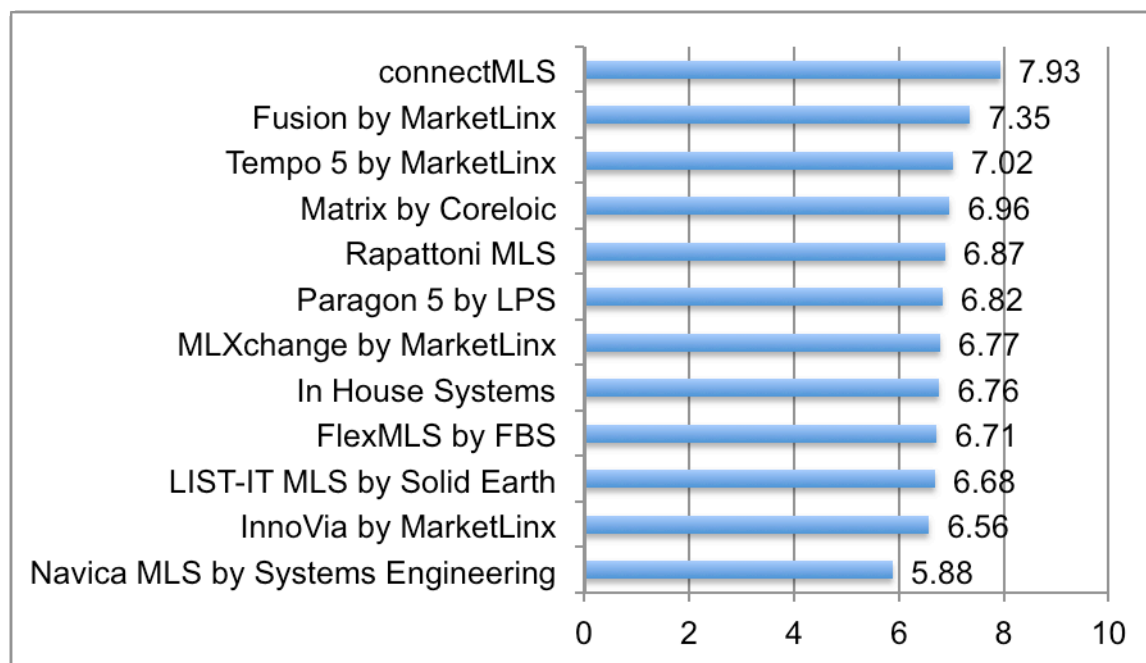


- It is interesting to note that over 20% of the respondents say they do not use the auto search feature.

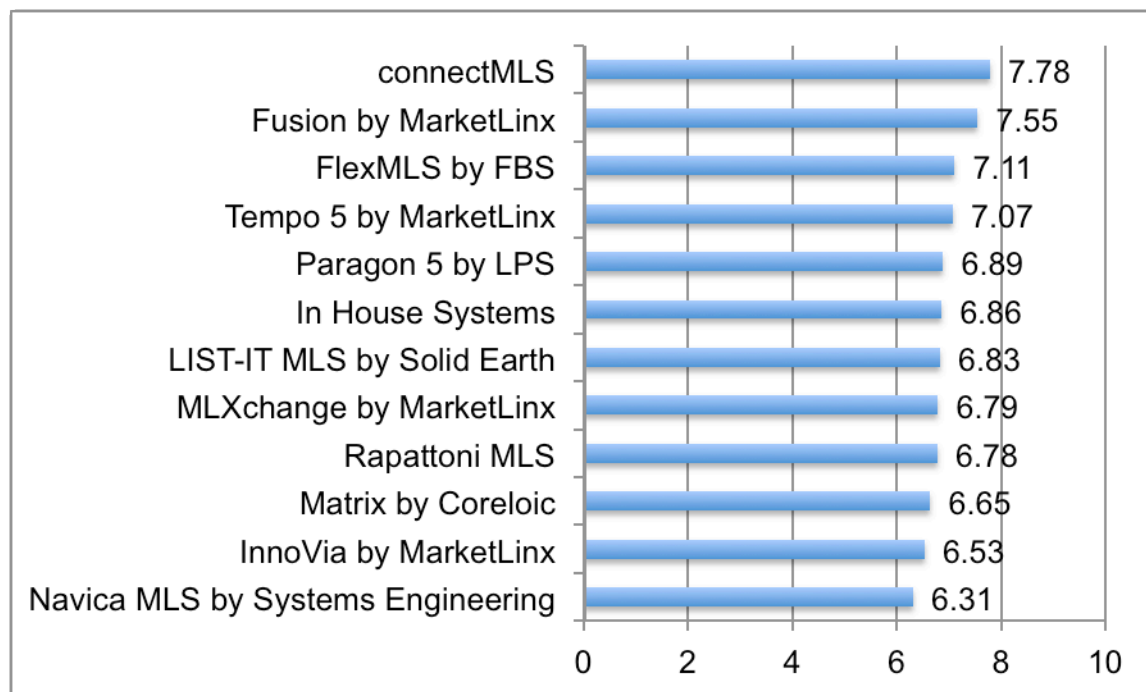
On a scale of 1 to 10, how easy is it to set up auto search for customers?



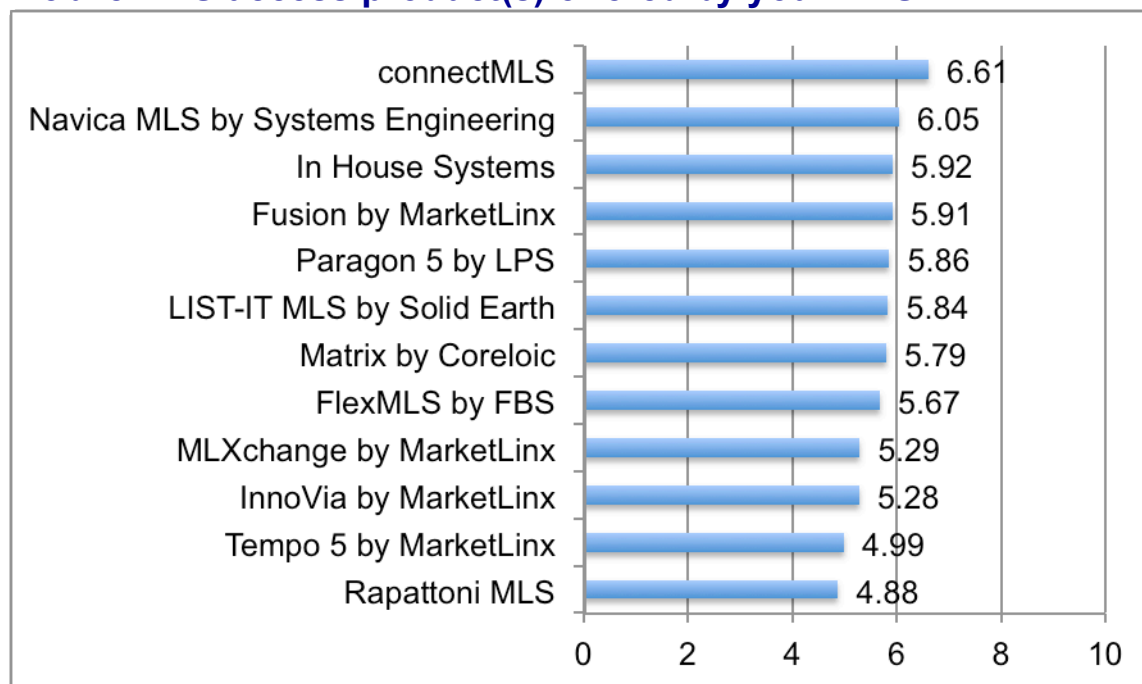
On a scale of 1 to 10, how would you rate your MLS system in terms of being able to search for listings by using a map to define your areas?



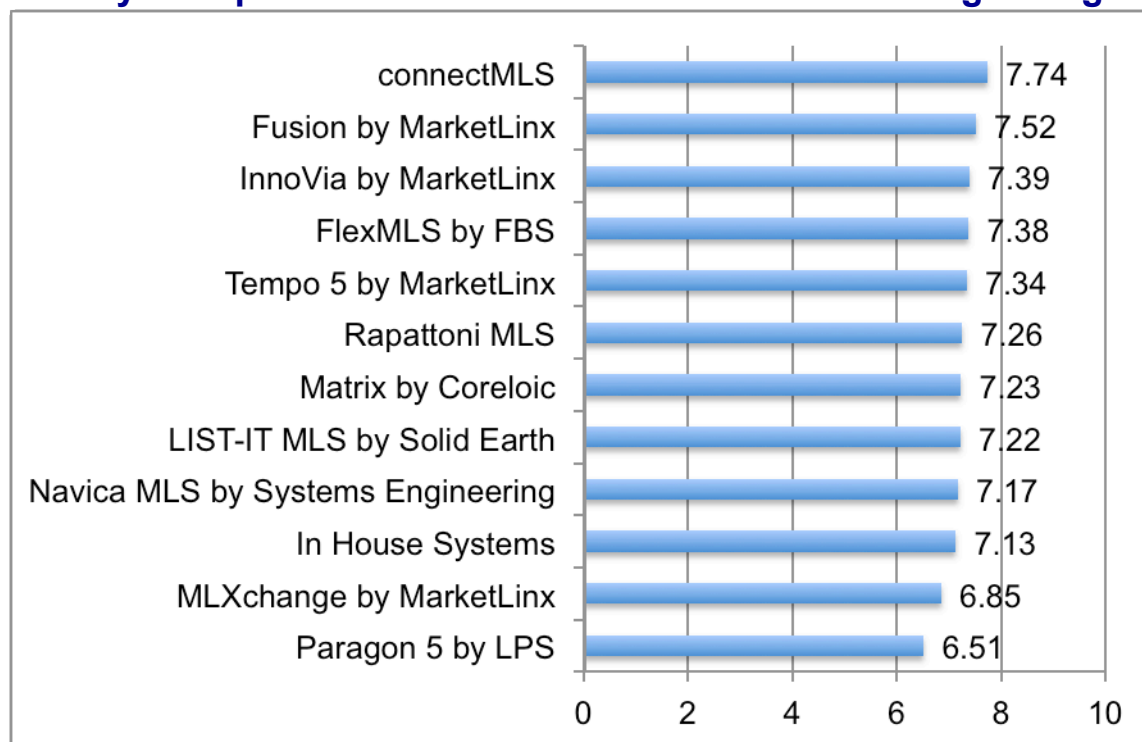
On a scale of 1 to 10, how would you rate your MLS system on the way search results are displayed on a map for review?



On a scale of 1 to 10, how would you rate your satisfaction with the mobile MLS access product(s) offered by your MLS?



On a scale of 1 to 10, how would you rate the private website your MLS system provides for clients to view their matching listings?



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 several of its own studies including the 2009 Transaction Management Adoption Study, MLS Consumer Website Effectiveness Study, Broker Website Effectiveness Study, Edutizing, Real Estate Technology – Keys to Adoption, MLS Mobile Technology 2012 – What You Need to Know and 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, Europe and South America. WAV Group has expertise in the areas of technology evaluation, product development, market research, strategic planning, sales & marketing, technology selection and implementation.

WAV Group assists MLSs each year with technology evaluation and selection and can help you're your organization 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:

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

Attachment 3

MLS Systems – Mean Comparison Chart “1 – 10” Rating Questions

Staff	connectMLS	FlexMLS	Fusion	In House MLS	Innovia	LIST-IT MLS	Matrix	MLXchange	Navica MLS	Paragon 5	Rapattoni MLS	Tempo 5
On a scale of 1 to 10, how would you rate your overall satisfaction with your MLS system?	8.56	8.75	7.29	8.74	7.60	7.17	8.13	7.21	7.50	7.75	7.73	8.67
On a scale of 1 to 10, how would you rate your satisfaction with the customer service you receive from your MLS vendor?	9.25	8.50	6.62	9.50	8.60	7.36	7.78	7.29	9.25	7.67	8.21	9.67
On a scale of 1 to 10, how would you rate the responsiveness of your MLS vendor to complete administrative system change requests? For example: property sheet changes, additions to fields, etc.	9.16	8.56	6.31	10.00	8.20	6.09	7.24	6.82	8.25	7.00	8.00	8.33
On a scale of 1 to 10, rate your satisfaction with the quality of the initial MLS system installation?	8.79	8.75	6.77	9.25	8.00	8.64	6.45	7.07	9.67	7.17	7.62	8.33
On a scale of 1 to 10, rate how well you believe your vendor's MLS system upgrades keep your MLS system on the leading edge of technology.	8.70	8.33	7.18	8.53	8.25	6.82	7.70	5.60	6.00	7.09	7.39	7.50
On a scale of 1 to 10, how would you rate the quality of MLS upgrades and releases in terms of quality control - debugging before upgrades?	8.71	7.67	6.00	8.93	8.00	6.73	7.32	5.87	7.25	6.46	7.62	8.00
On a scale of 1 to 10, rate your MLS vendor on how well they resolve system issues when they do come up.	9.25	8.73	5.64	9.50	8.67	8.00	7.48	7.11	9.00	7.00	7.69	7.50
On a scale of 1 to 10, rate your MLS vendor on their willingness and ability to implement suggested changes to the MLS system.	8.48	8.46	6.73	8.75	8.33	7.82	7.26	6.27	7.75	7.09	7.00	8.00
On a scale of 1 to 10 rate the level of service provided to your members by your MLS vendor's help desk.	9.13	9.00	9.67	8.75	8.00	7.00	8.81	6.70	9.50	7.33	7.80	8.00
On a scale of 1 to 10, how would you rate your level of satisfaction with your 3rd party public records provider?	7.58	7.63	7.60	8.67	9.00	7.67	7.72	6.60	5.67	6.50	7.11	8.50
STAFF - Average rating all questions excluding overall satisfaction question	8.78	8.40	6.94	9.10	8.34	7.35	7.59	6.59	8.04	7.03	7.60	8.20
Users	connectMLS	FlexMLS	Fusion	In House MLS	Innovia	LIST-IT MLS	Matrix	MLXchange	Navica MLS	Paragon 5	Rapattoni MLS	Tempo 5
On a scale of 1 to 10, how would you rate your overall satisfaction with your MLS system?	8.21	7.65	7.36	7.62	7.08	7.57	7.25	7.03	7.55	7.89	7.40	7.30
On a scale of 1 to 10, how would you rate the technical support you receive from your MLS?	8.95	8.42	8.70	8.55	7.89	8.56	8.15	8.40	8.47	8.56	8.25	8.46
On a scale of 1 to 10, how would you rate the technical support you receive from your MLS?	8.40	7.85	7.43	8.05	7.26	7.84	7.75	7.23	7.10	7.93	7.39	7.58
On a scale of 1 to 10, how would you rate your MLS system in terms of its design and visual appeal?	8.03	7.58	7.34	7.61	7.11	7.52	7.09	7.12	7.59	7.82	7.18	7.22
On a scale of 1 to 10, how would you rate your MLS system in terms of it's ease of use?	8.12	7.61	7.07	7.91	7.30	7.78	6.90	7.23	7.52	7.77	7.28	7.33

How would you rate your system on the following feature/functional areas?	connectMLS	FlexMLS	Fusion	In House MLS	Innovia	LIST-IT MLS	Matrix	MLXchange	Navica MLS	Paragon 5	Rapattoni MLS	Tempo 5
Adding and modifying listings	7.94	7.70	7.59	7.65	7.32	7.59	7.18	7.23	7.18	7.87	7.57	7.03
Searching listings	8.20	7.57	7.49	7.91	7.47	7.85	7.04	7.41	7.28	7.82	7.37	7.60
Setting up auto search for customers	7.81	6.99	6.85	7.46	6.65	6.76	6.22	6.94	7.22	6.85	6.82	7.00
CMA	7.39	6.89	6.41	6.43	5.99	6.90	5.98	5.92	5.68	6.19	6.48	6.68
Creating personalized/branded listing brochures	6.84	6.23	5.83	5.69	6.08	6.05	5.38	5.44	5.71	6.25	5.62	5.62
Statistical report functions	7.30	6.48	6.64	6.55	6.31	6.69	6.21	5.92	5.89	6.65	6.49	6.32
Tax and public record searching	7.49	7.31	7.34	7.72	7.19	6.58	6.89	6.25	3.50	6.48	6.34	7.25
Ease of loading and managing photos on the MLS system	7.91	7.07	7.40	7.36	7.35	7.11	7.36	6.84	5.41	7.52	7.09	6.87
On a scale of 1 to 10, how would you rate your MLS system in terms of being able to search for listings by using a map to define your areas?	7.93	6.71	7.35	6.76	6.56	6.68	6.96	6.77	5.88	6.82	6.87	7.02
On a scale of 1 to 10, how would you rate your MLS system on the way search results are displayed on a map for review?	7.78	7.11	7.55	6.86	6.53	6.83	6.65	6.79	6.31	6.89	6.78	7.07
On a scale of 1 to 10, how would you rate the private website your MLS system provides for clients to view their matching listings?	7.74	7.38	7.52	7.13	7.39	7.22	7.23	6.85	7.17	6.51	7.26	7.34
On a scale of 1 to 10, how would you rate your satisfaction with the mobile MLS access product(s) offered by your MLS?	6.61	5.67	5.91	5.92	5.28	5.84	5.79	5.29	6.05	5.86	4.88	4.99
USERS - Average rating all questions excluding overall satisfaction question	7.78	7.16	7.15	7.22	6.85	7.11	6.57	6.73	6.50	7.11	6.85	6.96