Smartphone Survey Report

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Methodology

In January 2010, the Center for REALTOR® Technology (CRT) extended an e-mail survey invitation to 45,000 random REALTORS® who have provided NAR with an email address. Additionally, the survey link was posted at www.realtor.org and on several social media sites.

This report summarizes national findings among associate brokers, sales agents, broker-owners, and managers. These groups account for 1,485 completed surveys. This number is large enough for overall responses to be considered statistically valid. At the 95% level of confidence, the margin of error is 2.54%. Any exceptions will be called out or labeled accordingly.

The purpose of the survey is to understand members' smartphone usage, perceptions, and needs.

A brief synopsis of findings is given in the Executive Summary followed by details for each key section.

The confidence interval, or margin of error, is the plus-or-minus figure usually reported in survey results. For example, if you have a confidence interval of 4.00 and 47% percent of your sample picks an answer, it is highly likely that if you had asked the question of the entire relevant population, between 43% (47%-4.00) and 51% (47%+4.00) would have picked that answer.

The confidence level provides percentage of likelihood that the entire relevant population will respond within the percent range of the confidence interval. The 95% confidence level means you can be 95% sure.

Some charts will show the 'mean'. The mean is the average of all the answers provided for that particular item.

Executive Summary

The purpose of the survey is to understand members' smartphone usage, perceptions, and needs. The following is a summary of key findings.

93% of those who indicated that they were 40 years old or younger use a smartphone to conduct real estate business. 86% of respondents older than 40 use a smartphone.

Top 3 smartphone brands used by respondents:
- Blackberry (41.2%)
- iPhone family: iPhone 3G (14.1%) ; iPhone 3GS (11.9%)
- Palm (14.0%)

A few respondents point out that the Palm Pre and Pixi cannot be compared with other Palm products. Several perceive the Pre and Pixi to be "more robust" and comparable in functionality & features to the iPhone and Android .

Blackberry and iPhone were the top brands being considered for future purchase among current smartphone users and non-users. While some are unsure about the smartphone they would choose in the future.

Executive Summary

(Continued)

Top 3 reasons why respondents were motivated to choose current smartphone:
- Best device for email (45.9%)
- Ease of use (26.2%)
- Ability to use a keyboard (23.7%)

Top 5 features used most by respondents on their smartphones:
- Telephone (91.2%)
- Email (88.4%)
- SMS/texting (73.8%)
- Calendar (52.6%)
- Web browser (42.3%)

For general purposes, social-media-related apps were the most popular type of application downloaded by survey respondents (54.5%). This was followed by maps (43.3%) and weather applications (41.8%).

Executive Summary

On a scale of 1-5, where 5 is extremely satisfied – respondents' satisfaction with their current smartphone averages 4.23.
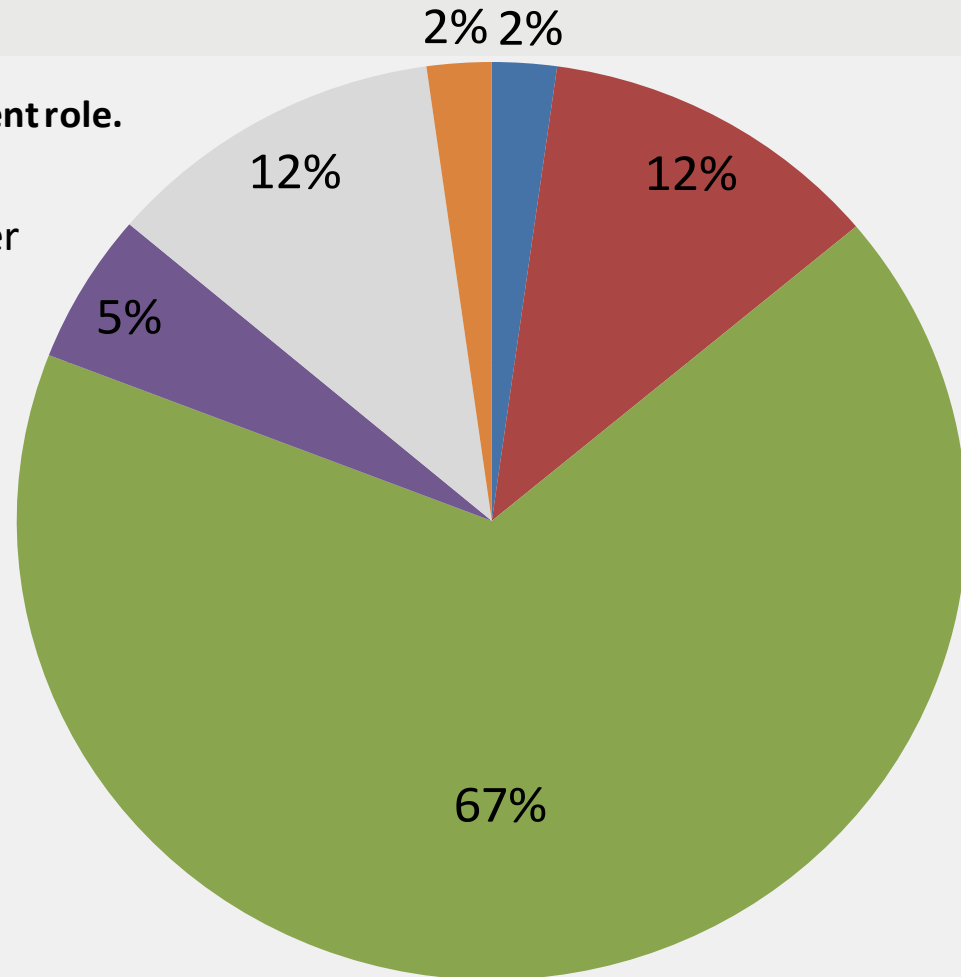
When it comes to MLS listing information:

- 57.3% indicate they have access to MLS listing information through their smartphone's web browser.
  - On a scale of 1-5, where 5 is extremely satisfied – respondents rated their <u>overall satisfaction </u>with the MLS listings available through their smartphone a 3.12.

- 10.7% do not have access to listings via a smartphone because their MLS does not allow it.
  - Of this group, 94.4% are very interested in obtaining access via their smartphone.

- 11.4% are not interested in accessing MLS listings via their smartphone.
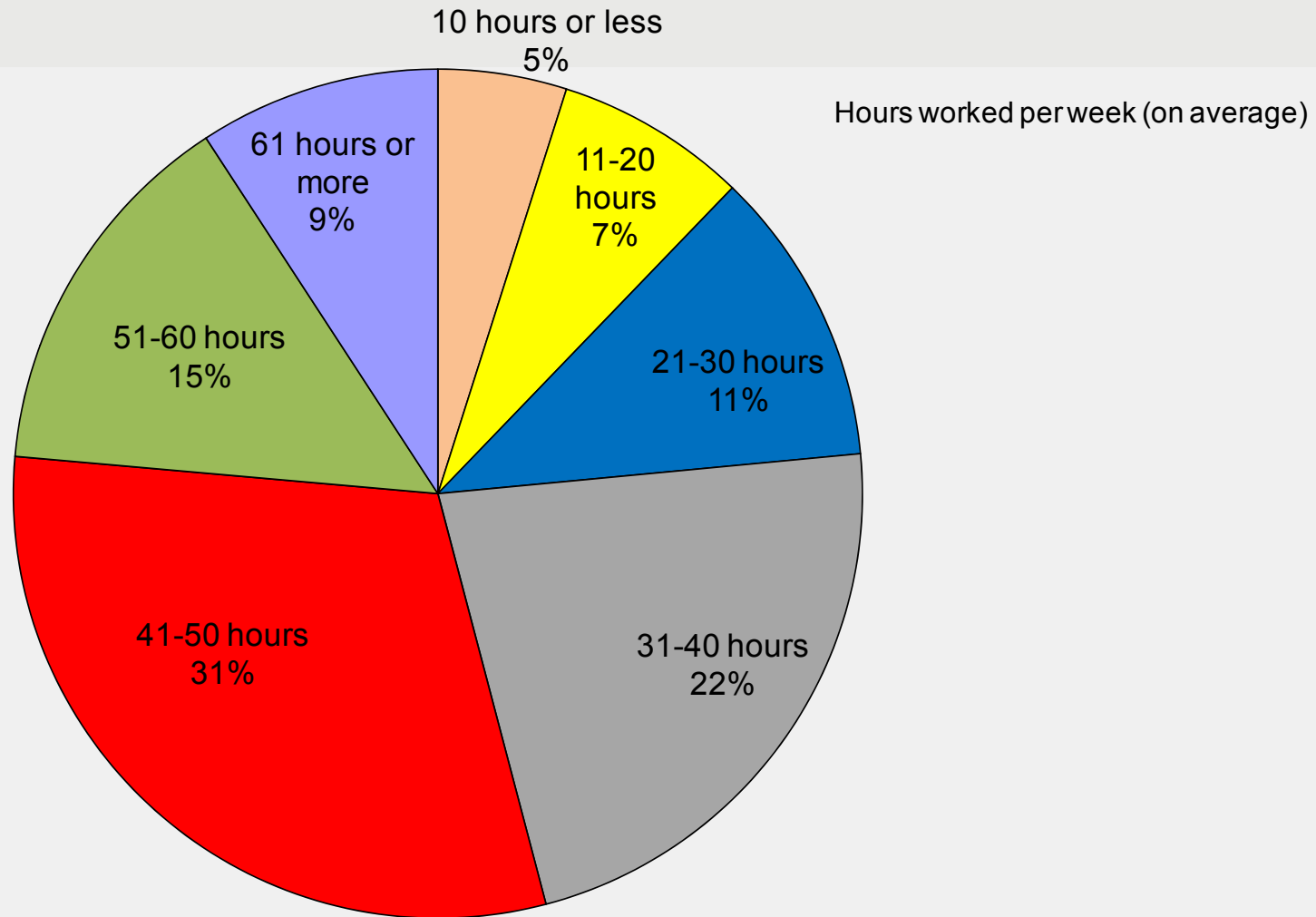
Respondent Profile

Respondents' current role.
- Manager
- Associate Broker
- Sales Agent
- Broker
- Broker-Owner
- Other

2% 2%
12%
12%
5%
67%

Respondent Profile

Hours worked per week (on average)

Smartphone OS

What operating system (OS) do you have on your current business smartphone?

OS	Percentage
Not Sure	4.2%
Google/Android	7.3%
Palm	11.3%
Windows Mobile	11.7%
iPhone	26.2%
BlackBerry	38.2%
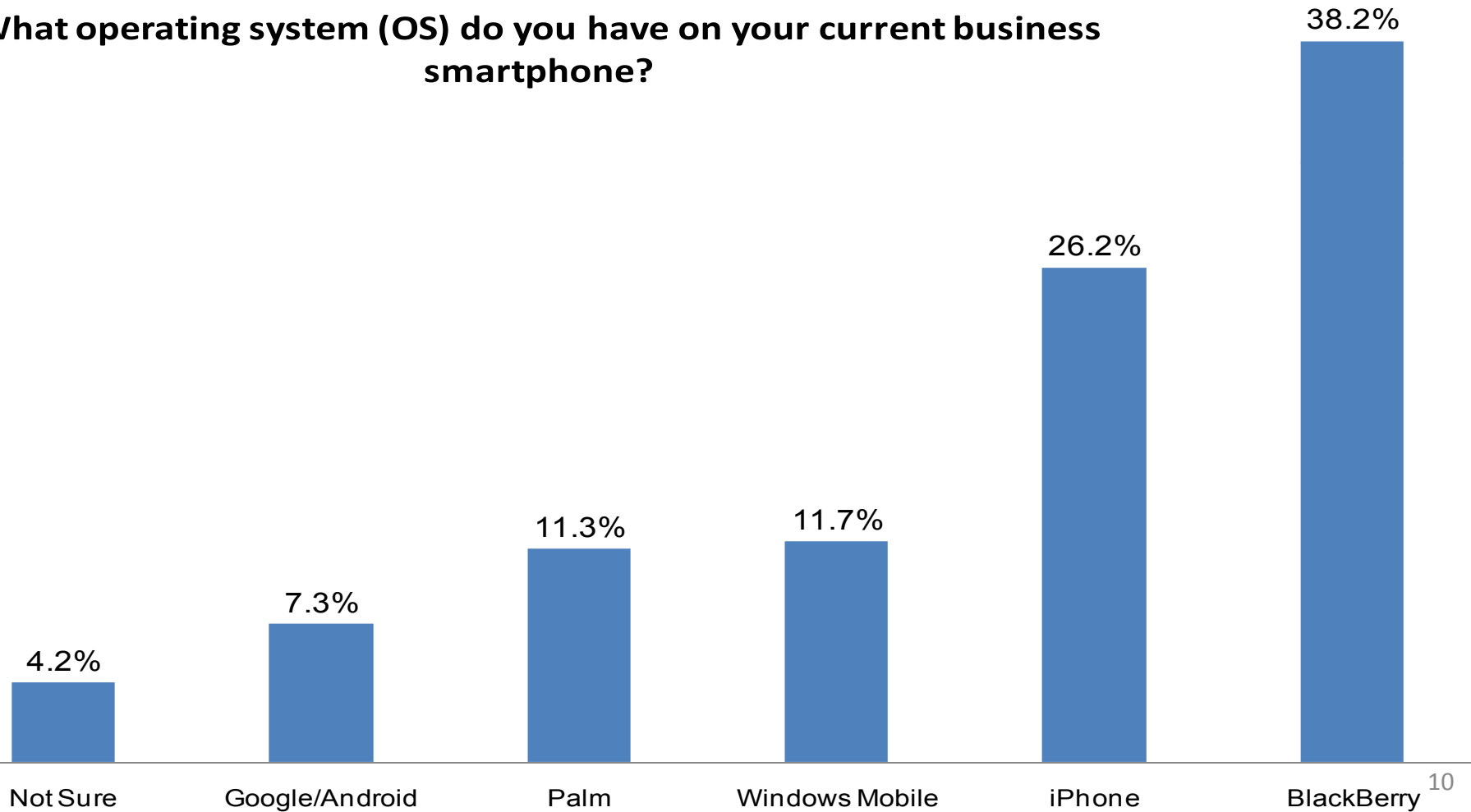
Respondent Profile

Forty-five percent of respondents are age 40 or younger.
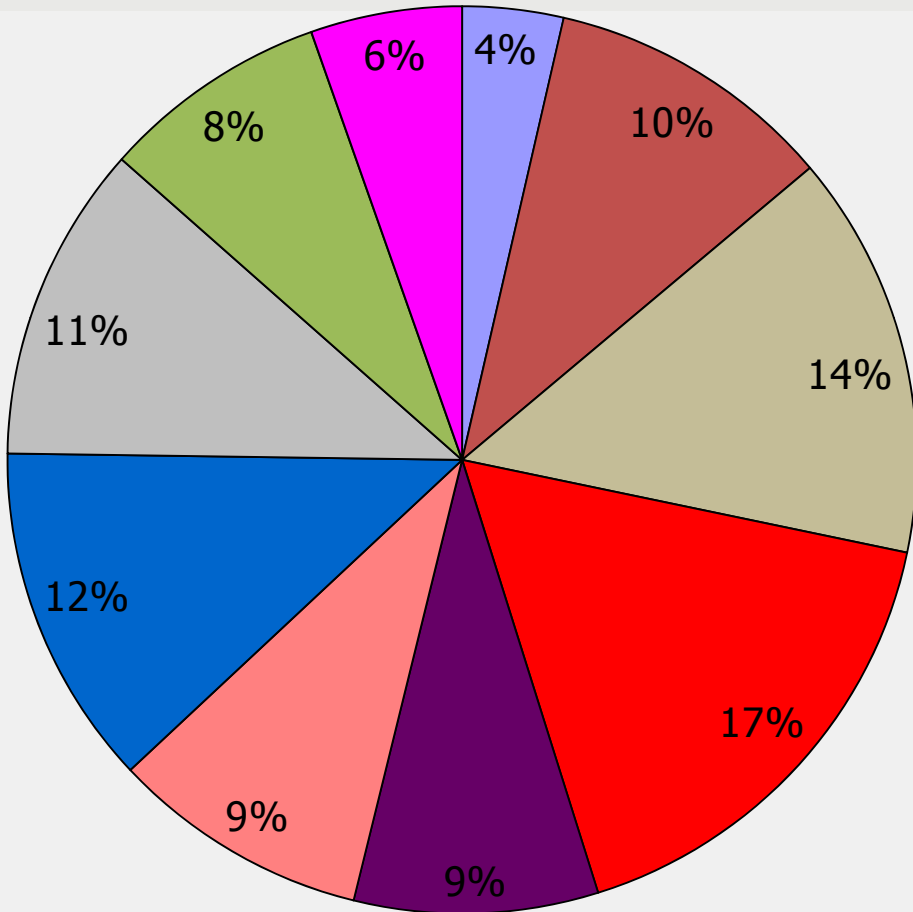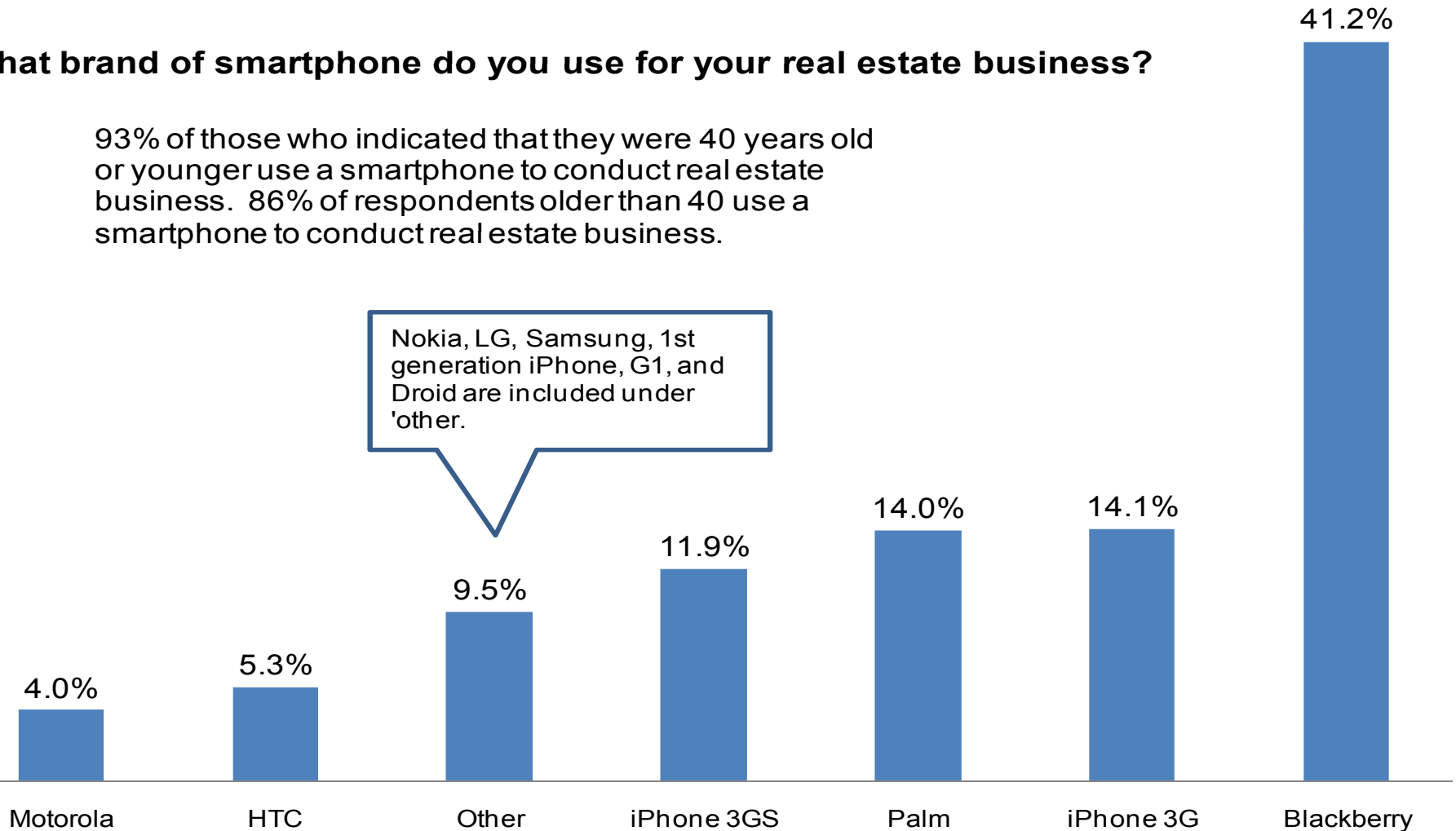

Age Ranges:
- 25 year old or less
- 26-30 years old
- 31-35 years old
- 36-40 years old
- 41-45 years old
- 46-50 years old
- 51-55 years old
- 56-60 years old
- 61-65 years old
- 66 years or more

Smartphone Brands

What brand of smartphone do you use for your real estate business?

93% of those who indicated that they were 40 years old or younger use a smartphone to conduct real estate business. 86% of respondents older than 40 use a smartphone to conduct real estate business.

Nokia, LG, Samsung, 1st generation iPhone, G1, and Droid are included under 'other.

Brand	Percentage
Motorola	4.0%
HTC	5.3%
Other	9.5%
iPhone 3GS	11.9%
Palm	14.0%
iPhone 3G	14.1%
Blackberry	41.2%

Top Reasons for Acquiring a Smartphone

Top 3 motivators

45.9% — Best device for emails
26.2% — Ease of use
23.7% — Ability to use a keyboard
21.1% — I find the brand to be reliable
19.6% — I like the look & feel of the phone
19.5% — It is Wi-Fi / Bluetooth enabled
15.2% — The screen size
14.9% — Both, touch screen & keyboard
14.9% — Best device for surfing the Internet
14.7% — It is GPS enabled
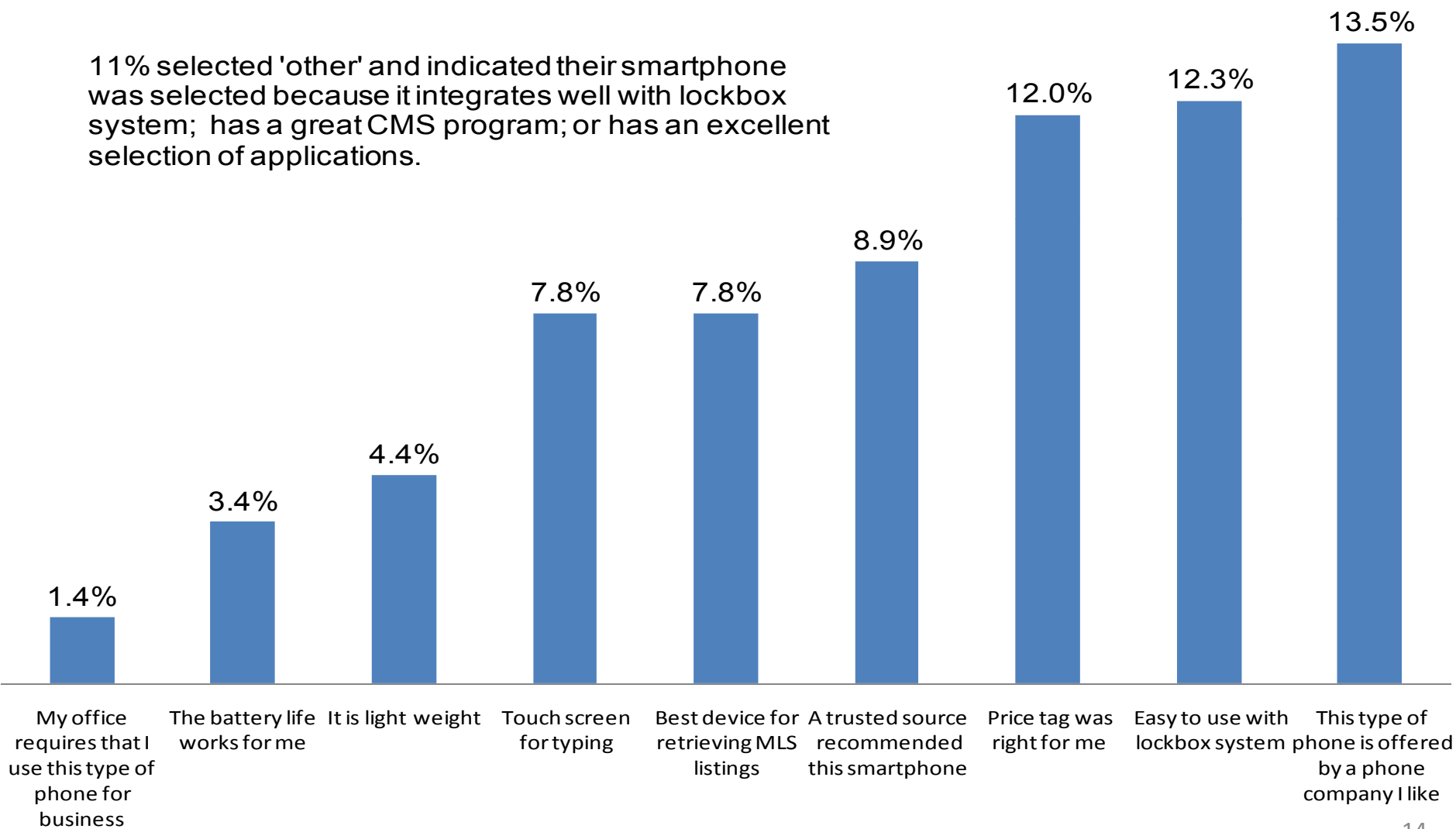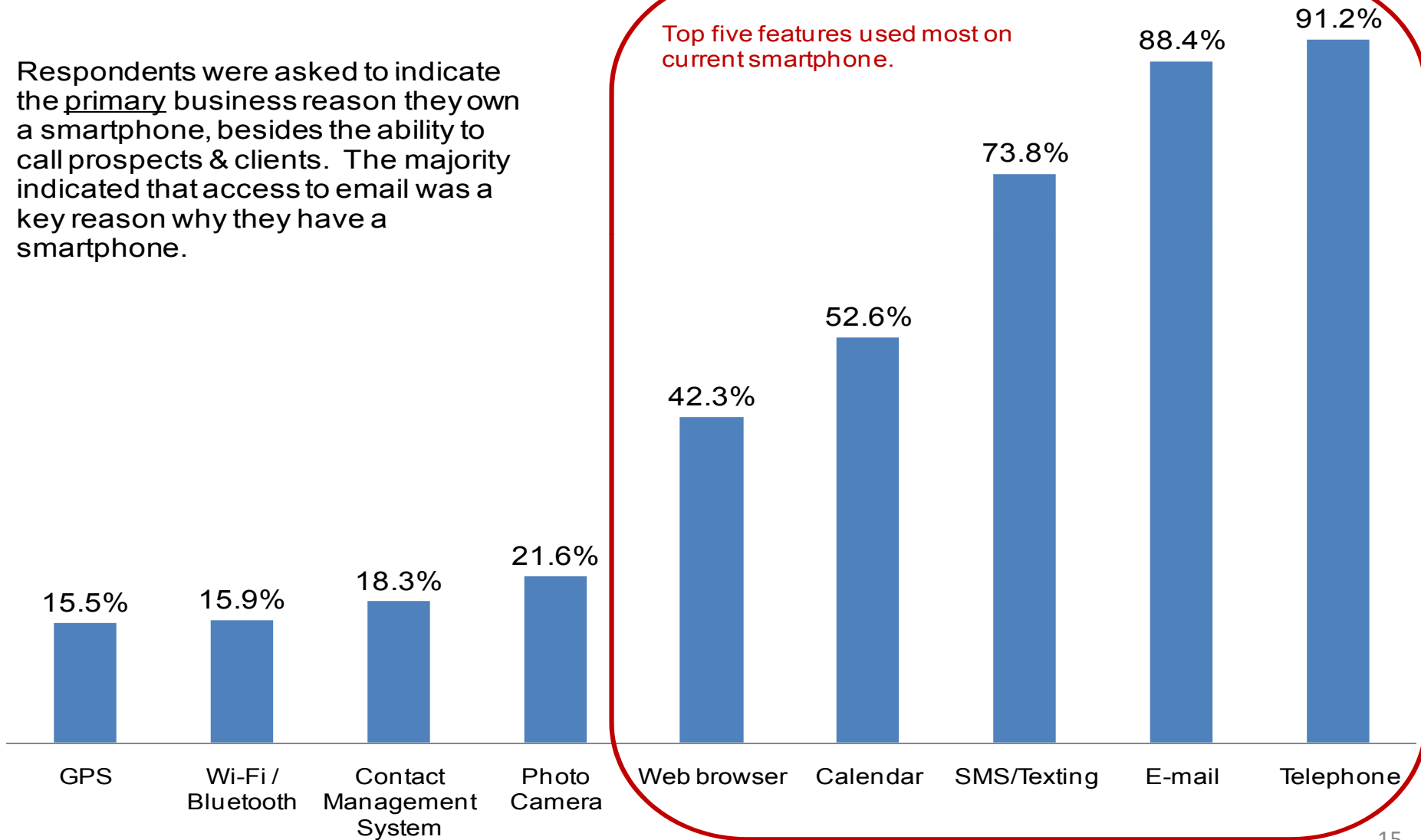
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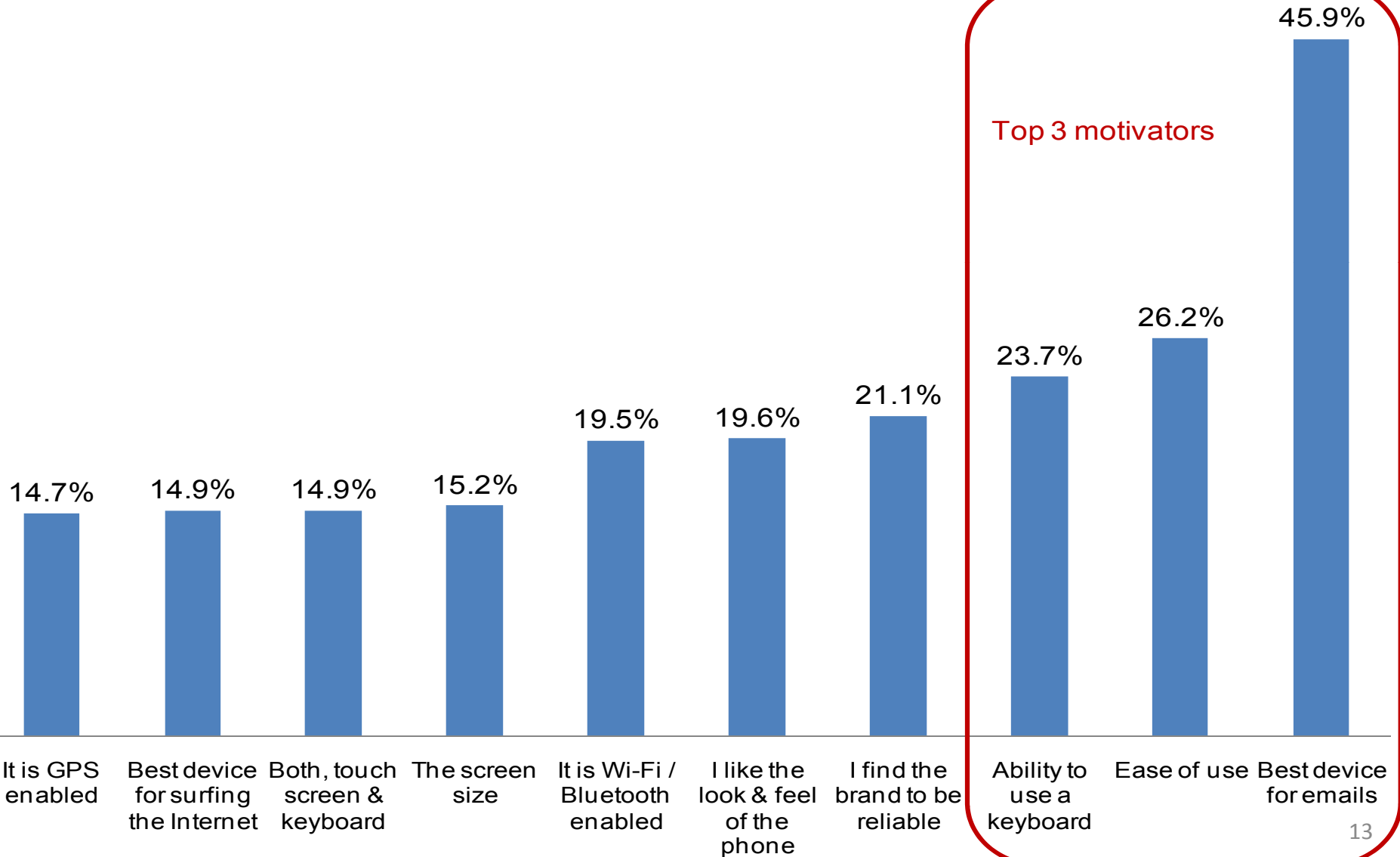
Other Reasons for Acquiring a Smartphone

11% selected 'other' and indicated their smartphone was selected because it integrates well with lockbox system; has a great CMS program; or has an excellent selection of applications.

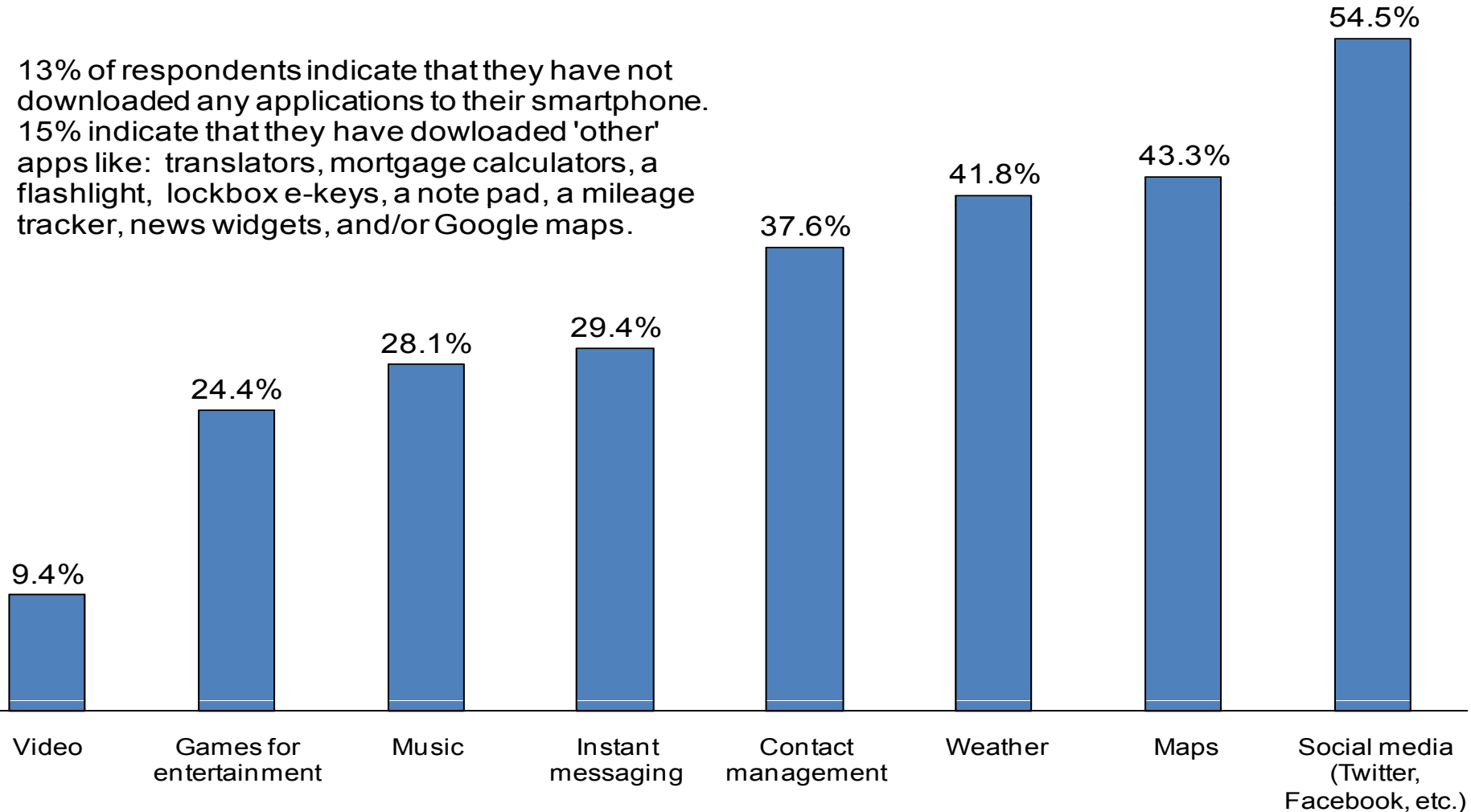| Reason	Percent
My office requires that I use this type of phone for business	1.4%
The battery life works for me	3.4%
It is light weight	4.4%
Touch screen for typing	7.8%
Best device for retrieving MLS listings	7.8%
A trusted source recommended this smartphone	8.9%
Price tag was right for me	12.0%
Easy to use with lockbox system	12.3%
This type of phone is offered by a phone company I like	13.5%

Most-Used Smartphone Features

Respondents were asked to indicate the <u>primary</u> business reason they own a smartphone, besides the ability to call prospects & clients. The majority indicated that access to email was a key reason why they have a smartphone.

Feature	Percentage
GPS	15.5%
Wi-Fi / Bluetooth	15.9%
Contact Management System	18.3%
Photo Camera	21.6%
Web browser	42.3%
Calendar	52.6%
SMS/Texting	73.8%
E-mail	88.4%
Telephone	91.2%

Smartphone Apps

*Respondents were asked to tell us their <u>favorite</u> smartphone application. With open-ended responses, the most common answers were maps, instant messaging, Pandora radio, and social media applications. Specifically, the following social media apps were mentioned most frequently: Facebook, Swift App, Tweetie, UberTwitter, Twitdroid, and/or Tetherberry.

*What applications are survey respondents looking for but can't find? Although there are a lot of apps available, many indicated a desire to have their MLS offer a smartphone app.

A few pointed out apps they wish existed or features they wanted their smartphone to have that are highly desired: an e-Key for accessing lockboxes; an easy-to-use and free mortgage calculator; a projector; or a faxing capability.

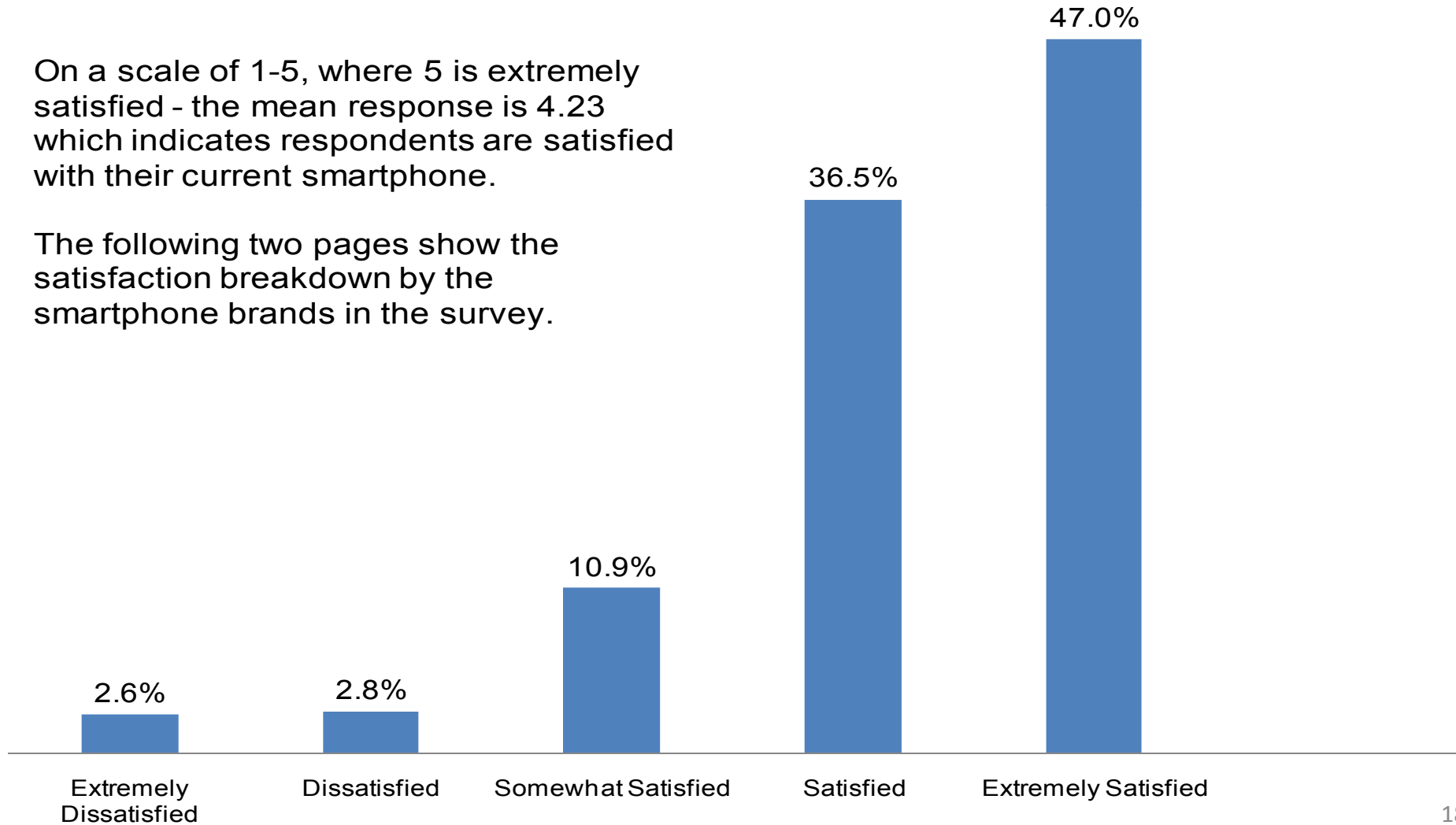* The information collected through these questions and presented on <u>this</u> page is strictly qualitative.

Smartphone Satisfaction

How satisfied are you with your current smartphone?

On a scale of 1-5, where 5 is extremely satisfied - the mean response is 4.23 which indicates respondents are satisfied with their current smartphone.

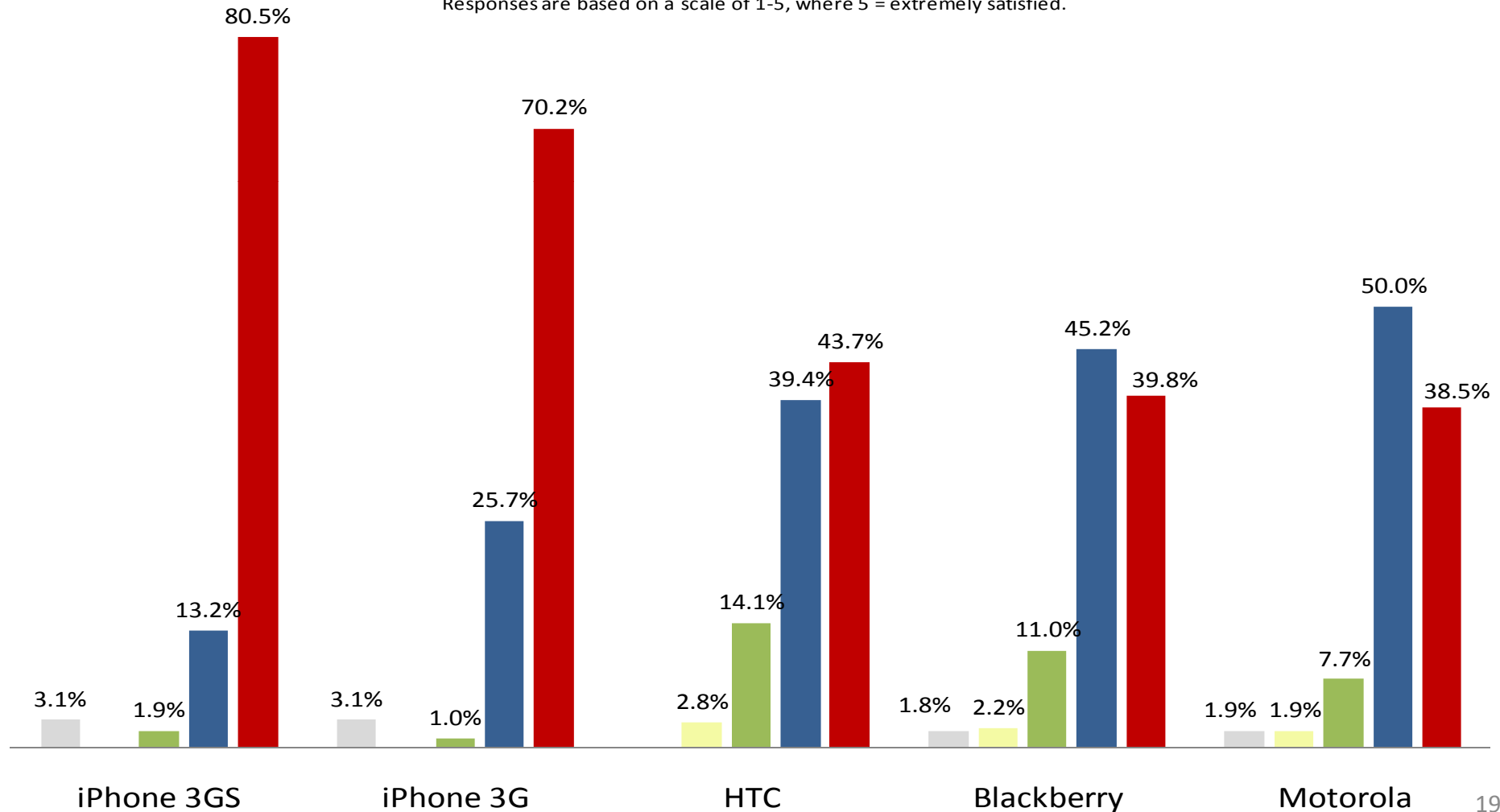The following two pages show the satisfaction breakdown by the smartphone brands in the survey.

Category	Percentage
Extremely Dissatisfied	2.6%
Dissatisfied	2.8%
Somewhat Satisfied	10.9%
Satisfied	36.5%
Extremely Satisfied	47.0%

Smartphone Satisfaction

■ Extremely Dissatisfied ■ Dissatisfied ■ Somewhat Satisfied ■ Satisfied ■ Extremely Satisfied

Responses are based on a scale of 1-5, where 5 = extremely satisfied.

iPhone 3GS: 3.1%, 1.9%, 13.2%, 80.5%

iPhone 3G: 3.1%, 1.0%, 25.7%, 70.2%

HTC: 2.8%, 14.1%, 39.4%, 43.7%

Blackberry: 1.8%, 2.2%, 11.0%, 45.2%, 39.8%

Motorola: 1.9%, 1.9%, 7.7%, 50.0%, 38.5%

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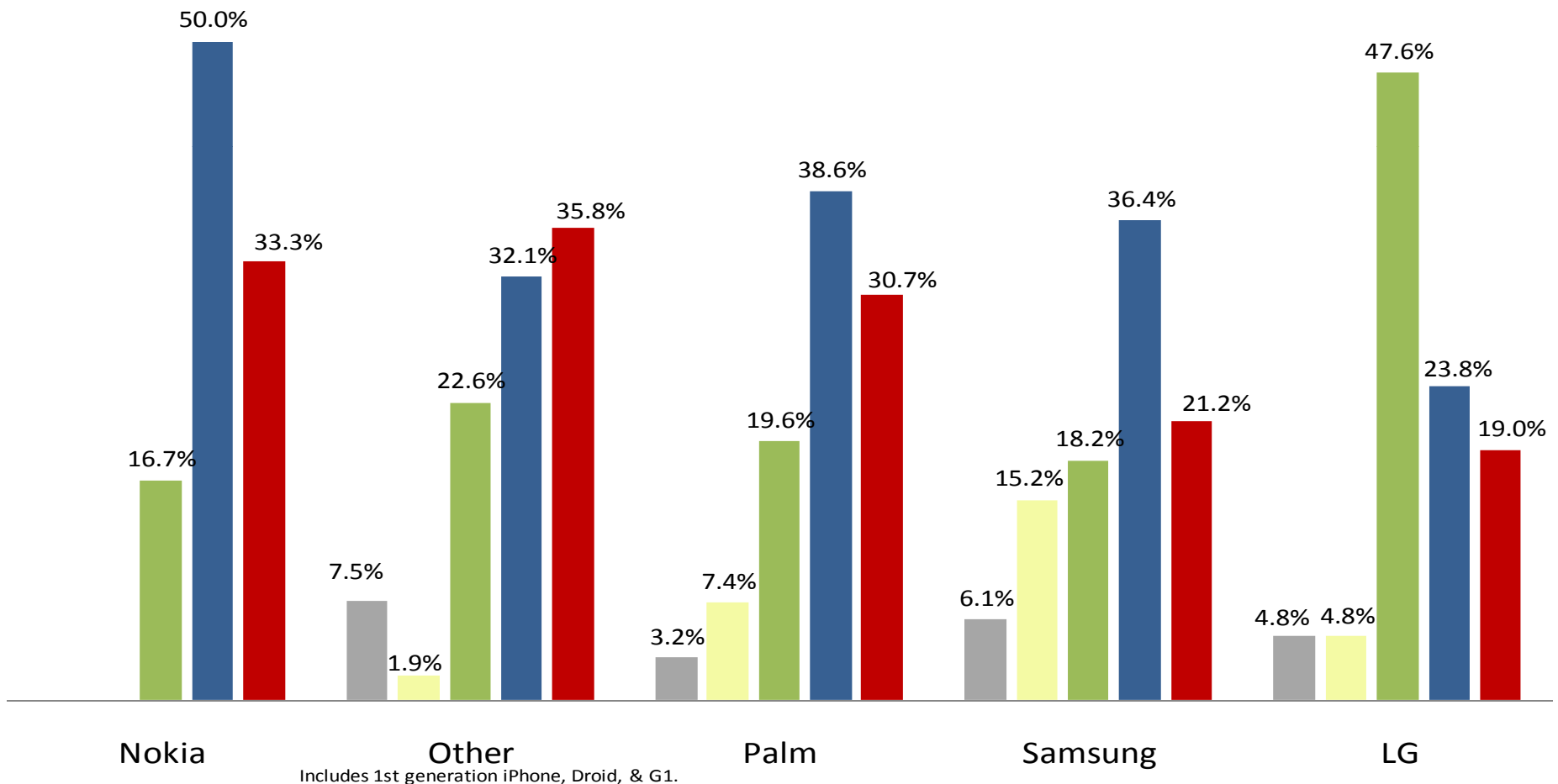
Replacing Your Business Phone Land Line?

Legend:
- ■ Yes
- ■ No, and I am not considering it
- □ No, but I may do it in the near future

Pie chart values:
- 46% (Yes)
- 35% (No, and I am not considering it)
- 19% (No, but I may do it in the near future)
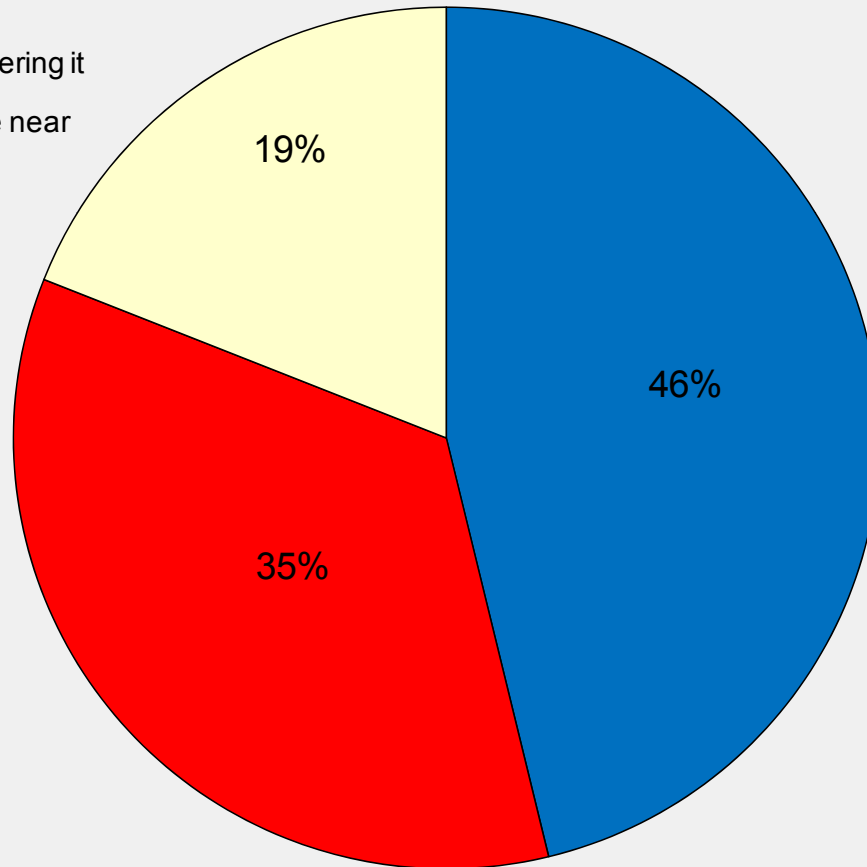
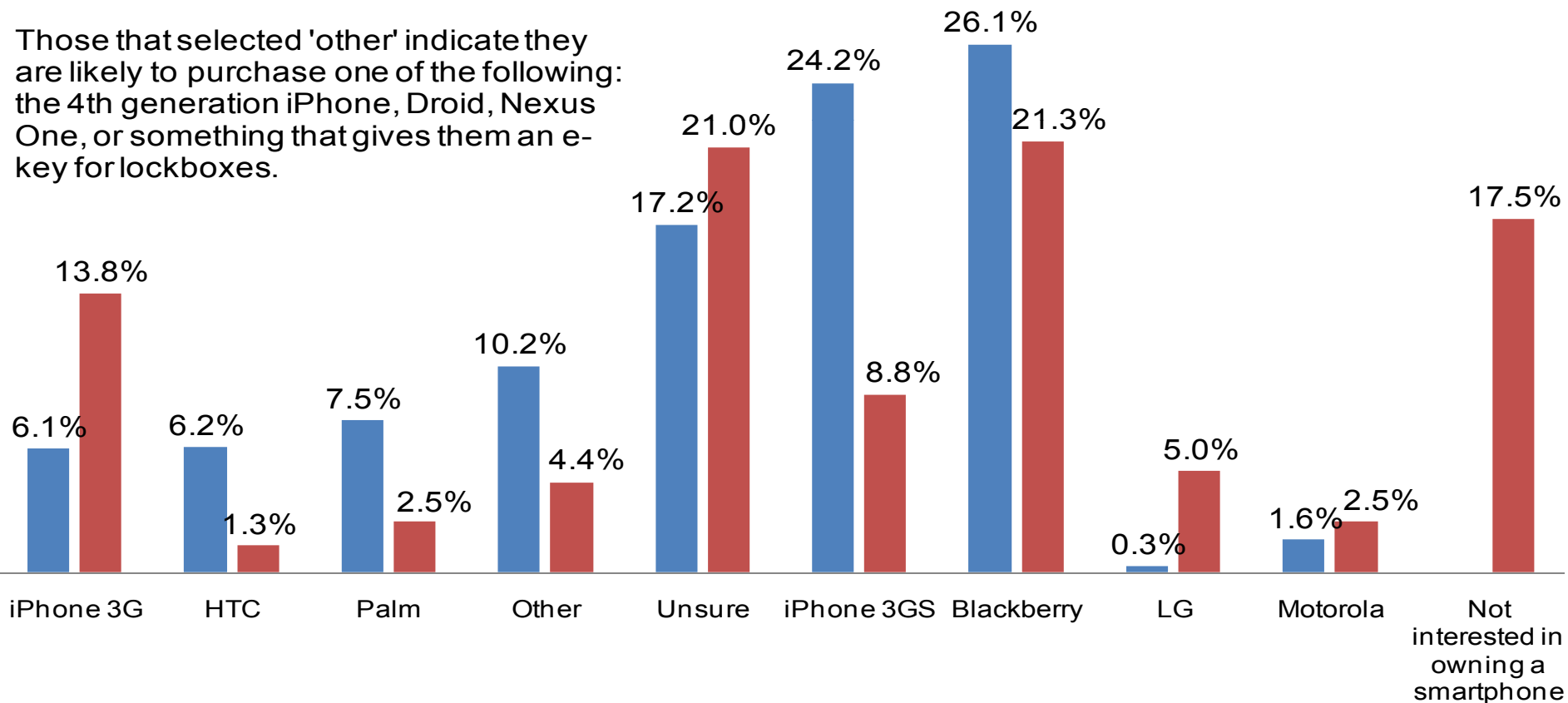# Smartphones under Consideration

■ Current Smartphone Users* ■ Non-Smartphone Users

Those that selected 'other' indicate they are likely to purchase one of the following: the 4th generation iPhone, Droid, Nexus One, or something that gives them an e-key for lockboxes.

	iPhone 3G	HTC	Palm	Other	Unsure	iPhone 3GS	Blackberry	LG	Motorola	Not interested in owning a smartphone
Current Smartphone Users*	6.1%	6.2%	7.5%	10.2%	17.2%	24.2%	26.1%	0.3%	1.6%	
Non-Smartphone Users	13.8%	1.3%	2.5%	4.4%	21.0%	8.8%	21.3%	5.0%	2.5%	17.5%

*Asked of those that indicated they are likely to replace their current smartphone with another one in the next twelve months (49%).

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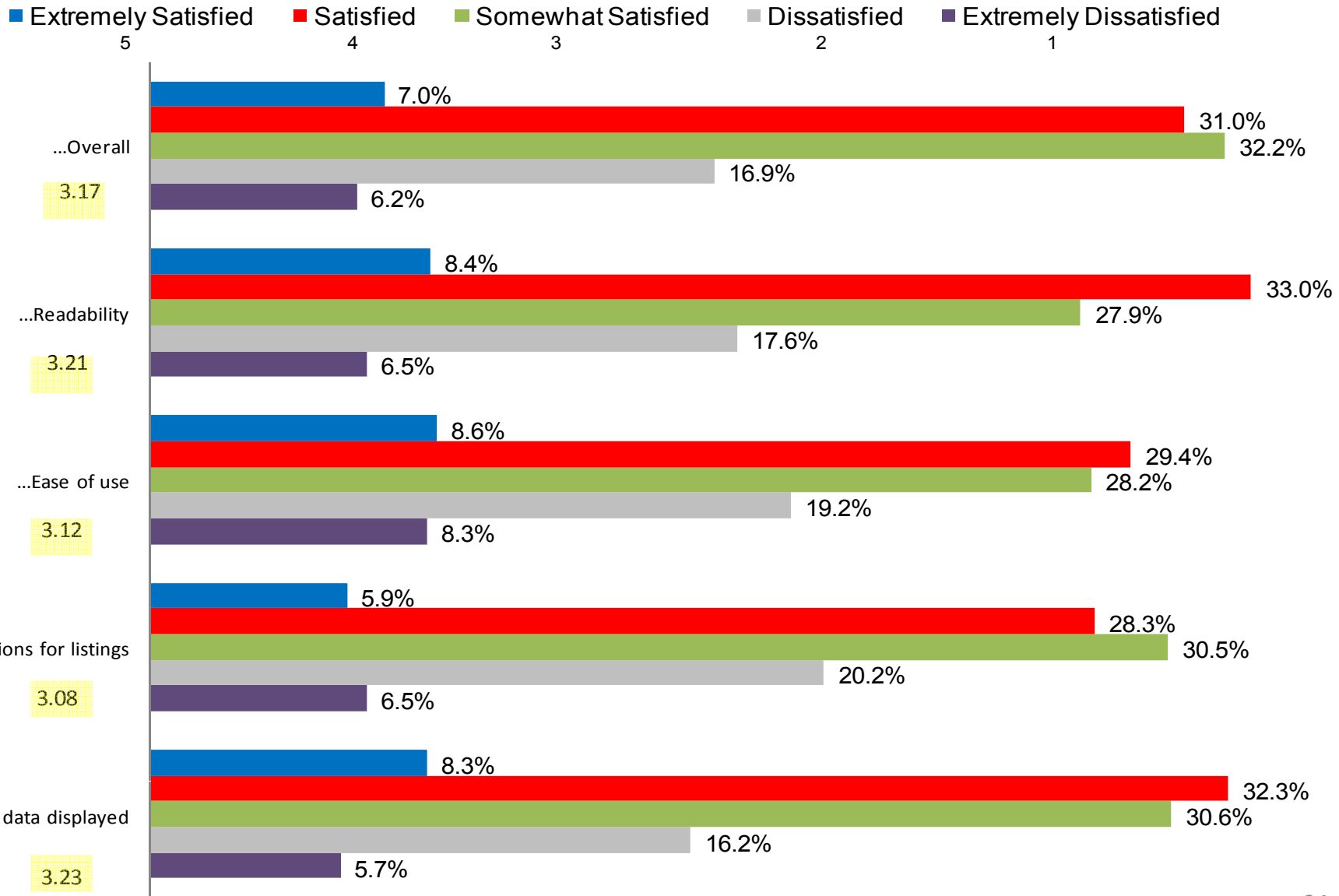# Access to MLS Information?

- 5%
- 11%
- 11%
- 16%
- 57%
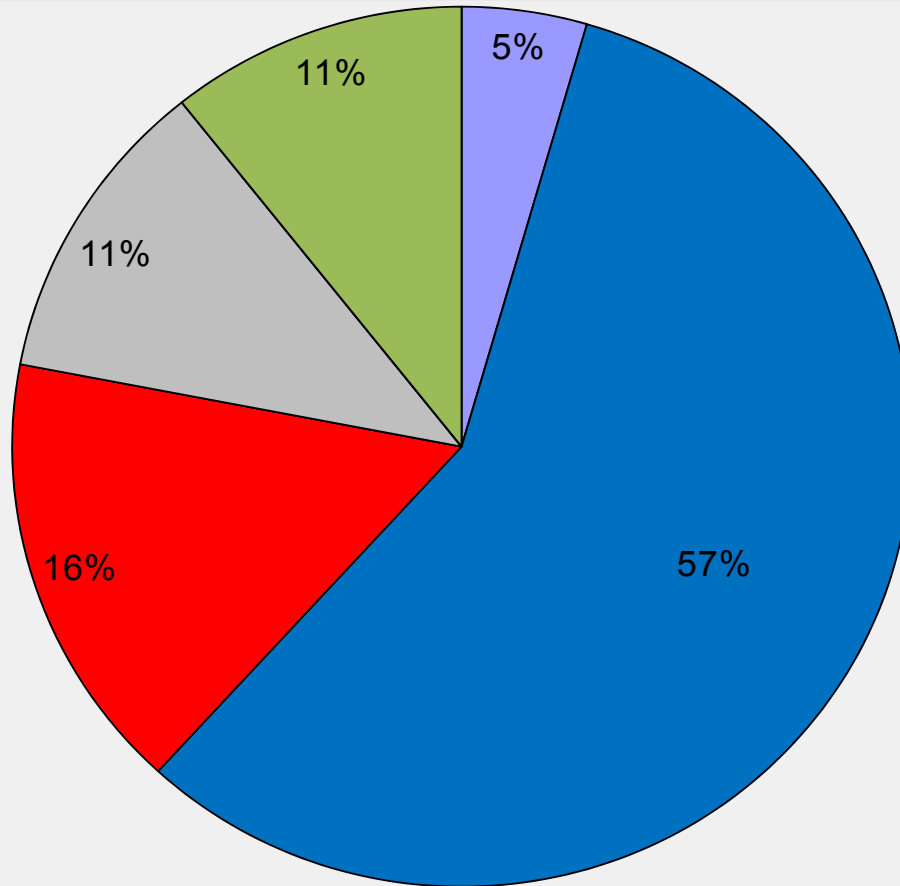
■ The MLS sends new listings directly to my smartphone

■ I can access the MLS system from my smartphone through a web browser

■ I can access the MLS system through a special smartphone application created for searching our listings

□ I am not interested in accessing MLS listings directly from my smartphone

■ Our MLS does not allow access to listings via smartphone*

* 94% of those whose MLS does not allow access to listings via a smartphone are 'very interested' in obtaining access to listings via their smartphone.

Those that have access to MLS listings were asked about their satisfaction. Results are outlined on the next page.

Satisfaction with MLS Access via Smartphone

The rating scale is 1-5 where 5 is extremely satisfied. Mean results are shown on the left-hand side of this chart for each category that was rated.

■ Extremely Satisfied ■ Satisfied ■ Somewhat Satisfied ■ Dissatisfied ■ Extremely Dissatisfied
5   4   3   2   1

...Overall — 3.17
- 7.0%
- 31.0%
- 32.2%
- 16.9%
- 6.2%

...Readability — 3.21
- 8.4%
- 33.0%
- 27.9%
- 17.6%
- 6.5%

...Ease of use — 3.12
- 8.6%
- 29.4%
- 28.2%
- 19.2%
- 8.3%

...Query options for listings — 3.08
- 5.9%
- 28.3%
- 30.5%
- 20.2%
- 6.5%

...Amount of data displayed — 3.23
- 8.3%
- 32.3%
- 30.6%
- 16.2%
- 5.7%

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Contact CRT

www.realtor.org/crt

The Smartphone Survey is conducted approximately every 18 months. The Center for REALTOR® Technology develops new survey sections as needed to track new developments in this area.

Please direct questions or comments about the 2009 REALTOR® Technology Report to:

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NAR's Center for REALTOR® Technology was established to provide technology leadership, guidance, and assistance for NAR members. Through its mission of implementation, advocacy, and information, CRT delivers informed industry insight, research, and open-source tools.

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