



CALIFORNIA
ASSOCIATION
OF REALTORS®

2009 Member Use of Technology Survey

Draft Results

August 2009

CALIFORNIA ASSOCIATION OF REALTORS®

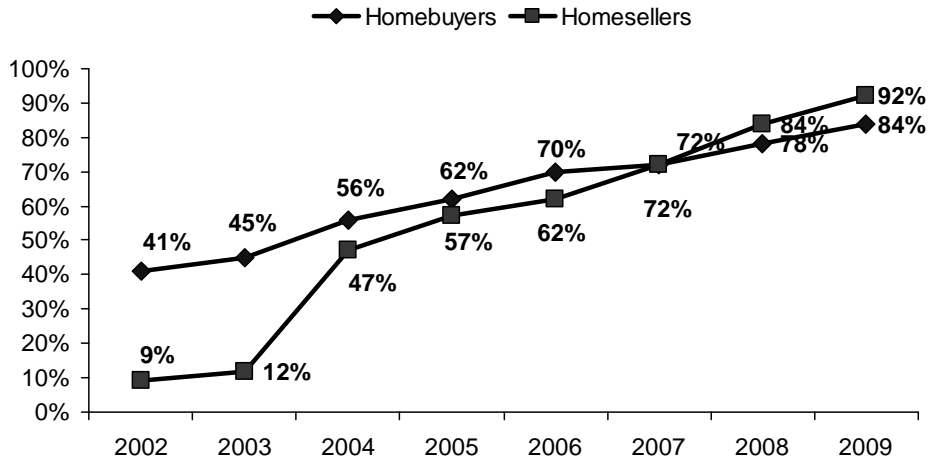
Methodology

- Surveys done in August 2009.
- Telephone interview methodology.
- 400 surveys selected on a random probability basis from membership data base.
- Results statistically projectable at two standard deviations (a 95% confidence level). Overall data is subject to a sampling error of +/- 5.0%.



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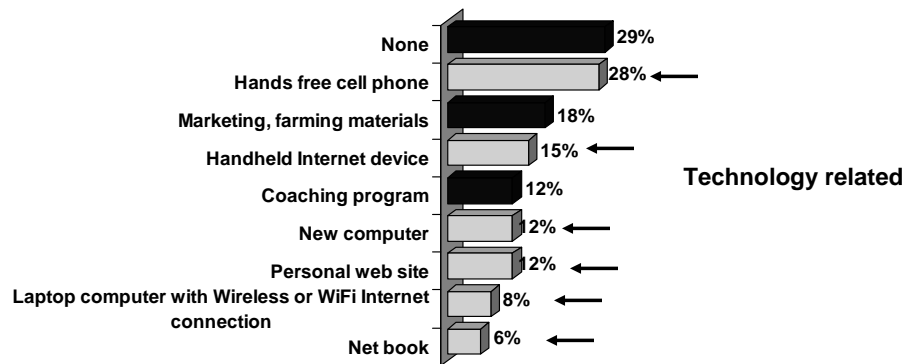
Percent of Internet Buyers & Sellers Share of All Buyers & Sellers Surveyed



Source: C.A.R. 2005 Internet Versus Traditional Buyer Survey
and C.A.R. 2006 California Home Seller Survey



Most Important Real Estate Business Purchase in the Last 12 Months



Selected listing of highest frequency responses.

Q: What do you consider to be your most important purchase for your real estate business in the last 12 months?



Most Important Real Estate Business Purchase in the Last 12 Months

-Historical Trend-

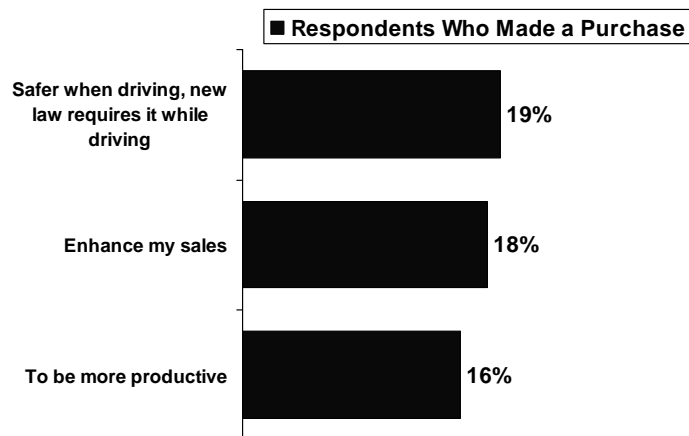
	2004	2005	2006	2007	2008	2009
None	0%	0%	18%	22%	31%	29%
Hands free cell phone	n/a	n/a	n/a	19%	27%	28%
Marketing, farming materials	n/a	n/a	n/a	9%	20%	18%
Handheld internet device	0%	32%	15%	13%	9%	15%
Coaching program	n/a	n/a	n/a	6%	13%	12%
New computer	38%	8%	17%	20%	13%	12%
Personal Web site	0%	0%	1%	n/a	n/a	12%
Laptop with wireless or WiFi internet connection	0%	1%	1%	6%	8%	8%
Netbook	n/a	n/a	n/a	n/a	n/a	6%

Selected listing of highest frequency responses.



Reasons for Most Important Real Estate Business Purchase

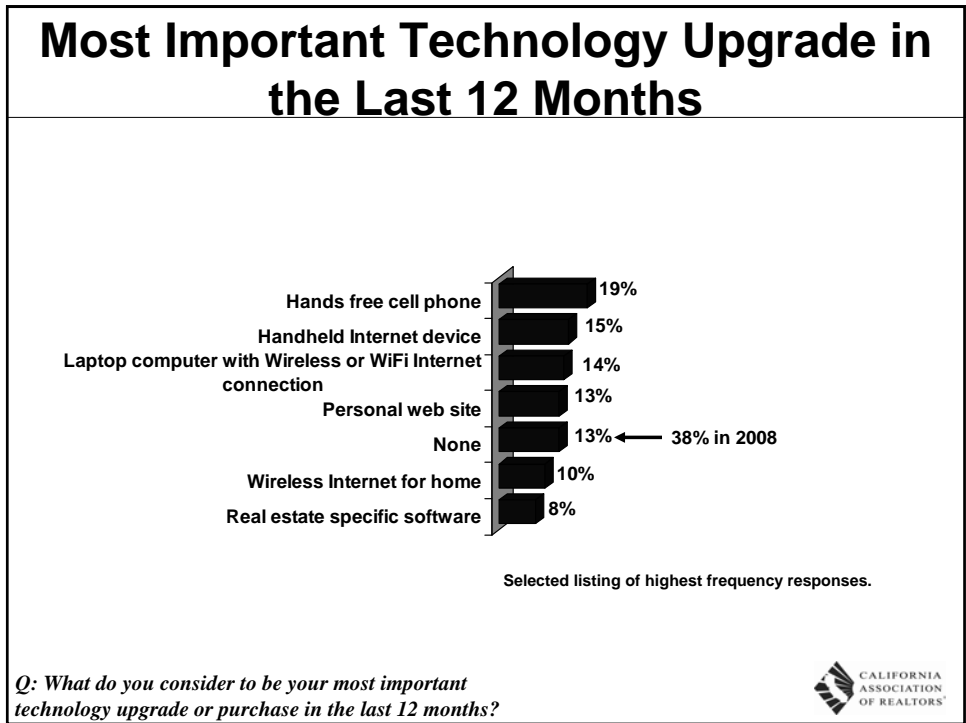
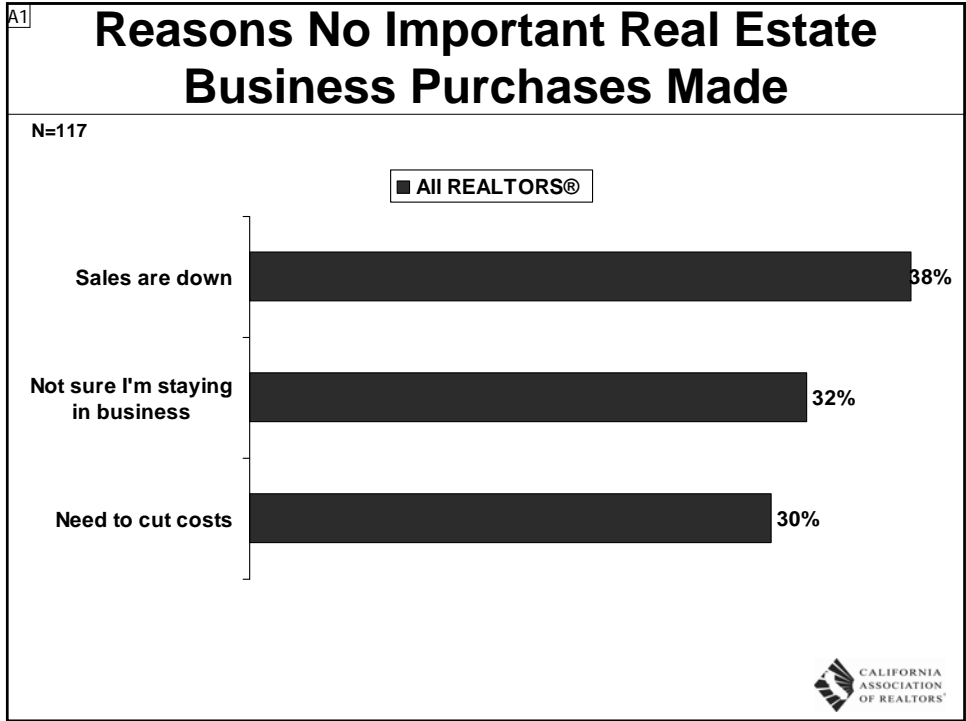
N=282



Selected listing of highest frequency responses.

Q: Why was that most important to your real estate business?





Most Important Technology Upgrade -Historical Trend-

	2004	2005	2006	2007	2008	2009
Hands-Free cell phone / ear piece	-	5%	4%	19%	39%	19%
Wireless, handheld Internet device (i.e. Blackberry, Treo, etc.)	-	32%	15%	15%	19%	15%
Laptop with WIFI/Wireless Internet	-	1%	1%	7%	13%	14%
None	-	-	18%	22%	38%	13%
Personal web site	-	-	1%	8%	4%	13%
Wireless Internet for home	-	-	-	5%	4%	10%
Specialized real estate software	3-	15%	16%	12%	9%	8%
New computer	38%	8%	17%	3%	4%	6%
Netbook	-	-	-	-	-	2%
Contact Management Software	-	-	-	7%	13%	-

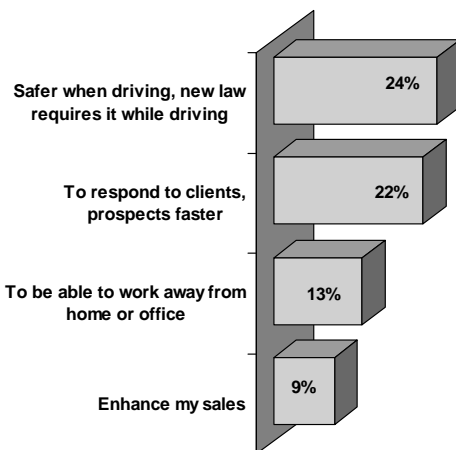
Q: What do you consider to be your most important technology upgrade or purchase in the last 12 months?



Reasons for Technology Upgrade

-Respondents Who Made a Purchase-

N=350



Selected listing of highest frequency responses.

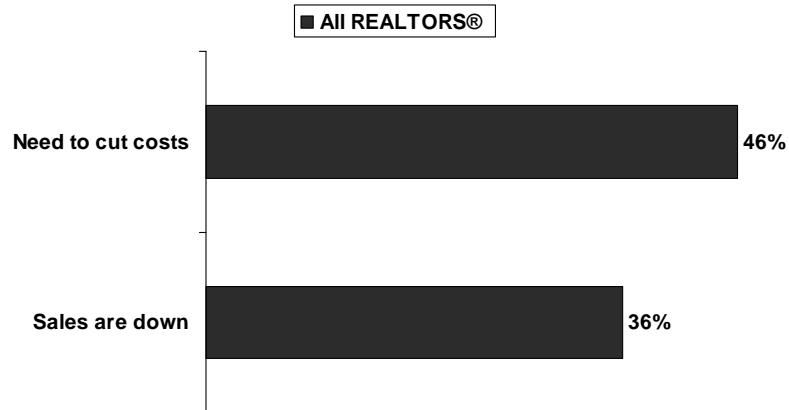
Q: Why was that the most important technology upgrade to your business?



A2

Reasons for No Technology Upgrades in the Last 12 Months

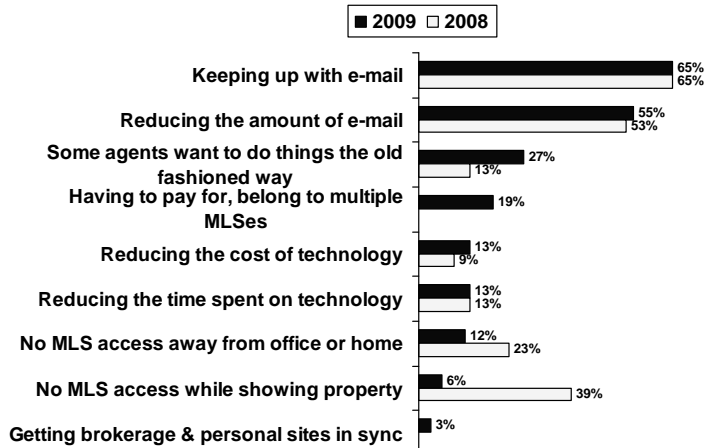
N=50



Q: Why was that most important technology upgrade?



Greatest Technological Challenge in Real Estate Business



Selected listing of highest frequency responses.

Q: What do you consider the biggest technological problem / challenge in your real estate business currently?



Greatest Technological Challenge

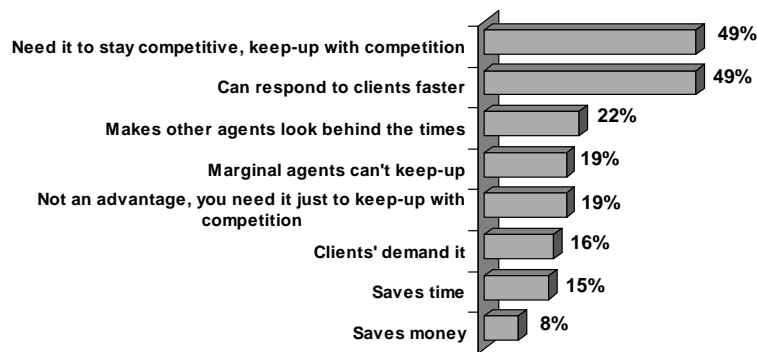
	2005	2006	2007	2008	2009
Keeping up with e-mail	62%	65%	67%	65%	65%
Reducing the amount of e-mail	0%	42%	43%	53%	55%
Some agents want to do things the old fashioned way	0%	0%	0%	13%	27%
Having to pay for / belong to multiple MLSes	-	-	-	19%	19%
Reducing the cost of technology	0%	19%	18%	9%	13%
Reducing the time spent on technology	0%	28%	27%	13%	13%
No MLS access away from office or home	0%	0%	0%	23%	12%
No MLS access while showing property	0%	0%	0%	39%	6%
Getting brokerage & personal sites in sync	-	-	-	-	3%
Finding ways to improve web site	0%	0%	0%	13%	0%
Integrating technological tools	40%	42%	16%	0%	0%
Keeping web site current	-	19%	18%	9%	0%

Q: What do you consider the biggest technological problem / challenge in your real estate business currently?

Selected listing of highest frequency responses.



How Technology Gives an Advantage Over Other Real Estate Agents



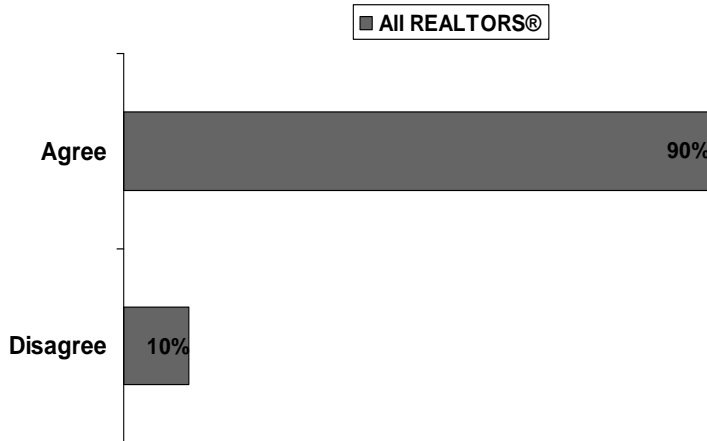
Selected listing of highest frequency responses.

Q: How does your use of technology in real estate give you an advantage over other real estate professionals?



cp1

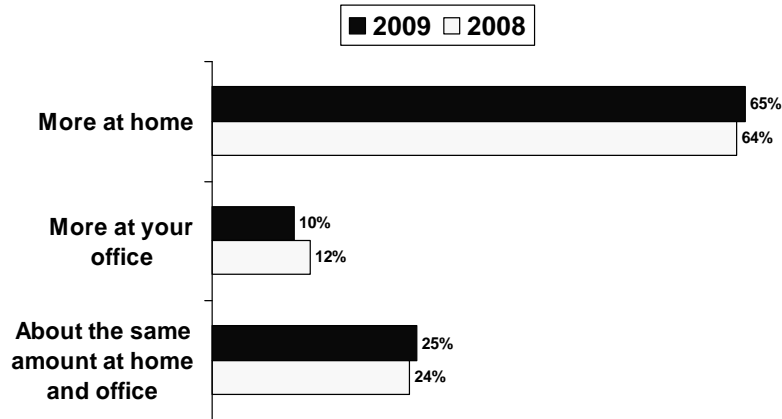
“Computers And Technology Give REALTORS® More Control Over Their Business”



Q: Please tell me if you agree with the following statement: “Computers and technology give REALTORS® more control over their business.”



Where REALTORS® Use Computers



Q: Do you use your computer for your residential real estate business (Read): more at home, more at your office, or about the same amount at home and office



Where REALTORS® Use Computers -Historical Trend-

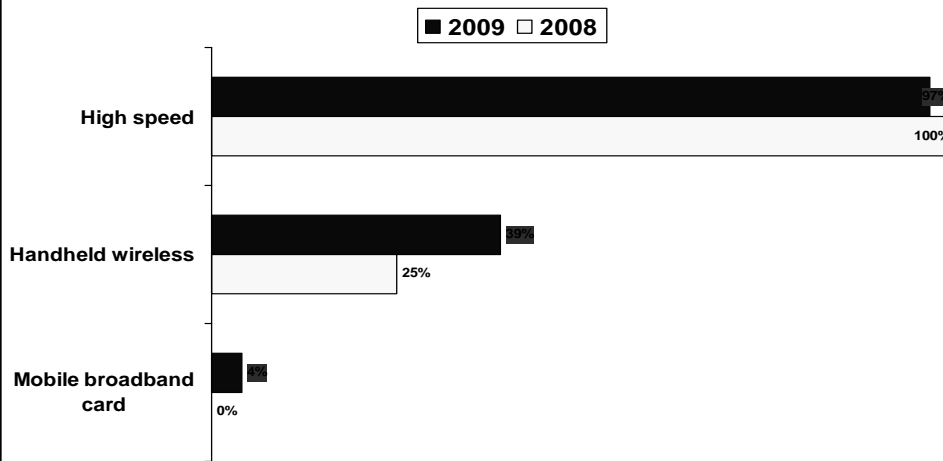
	2003	2004	2005	2006	2007	2008	2009
More at home	26%	27%	28%	48%	60%	64%	65%
About the same amount at home and office	43%	48%	43%	32%	26%	24%	25%
More at your office	32%	26%	29%	20%	14%	12%	10%

Q: Do you use your computer for your residential real estate business (Read): more at home, more at your office, or about the same amount at home and office



cp2

REALTOR® Internet Connection at Home



High speed combines cable and DSL.
There are multiple unaided responses.

Q: What type of Internet connection do you have at home? (There are multiple responses. Percentages will not total 100%)



REALTOR® Internet Connection at Home -Historical Trend-

	2003	2004	2005	2006	2007	2008	2009
High speed	71%	82%	90%	95%	97%	100%	97%
Handheld wireless	0%	5%	5%	4%	19%	25%	39%
Mobile broadband card	0%	0%	0%	0%	0%	0%	4%
Dial-up (analog)	28%	9%	6%	2%	1%	0%	0%
PDA / Handheld	0%	5%	0%	0%	0%	0%	0%

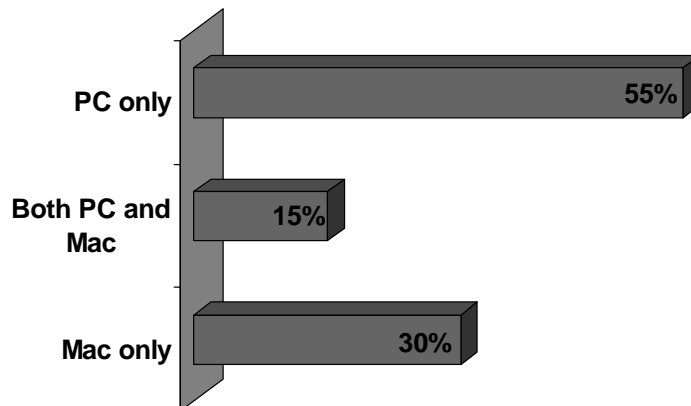
High speed combines cable and DSL.

There are multiple unaided responses.

Q: What type of Internet connection do you have at home? (There are multiple responses. Percentages will not total 100%)



Type of Computer Owned

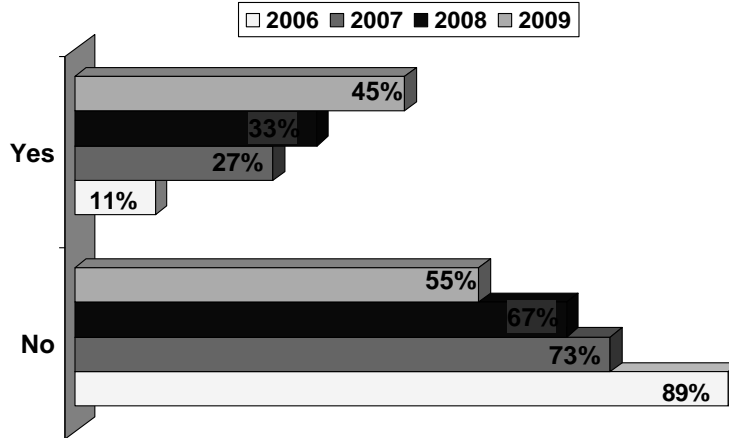


Q: What type of computer do you own?



REALTORS® Use of Technology in Field

Use of Laptop or Tablet Computer in Field

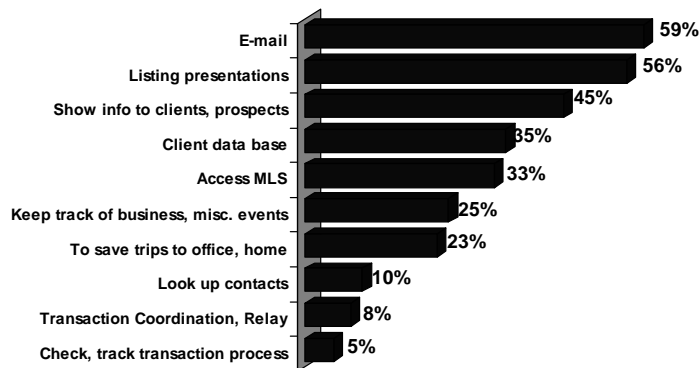


Q: Do you use your laptop computer or tablet computer when you conduct residential real estate business in the field?



How REALTORS® Use Laptop or Tablet Computer in Field

N=199

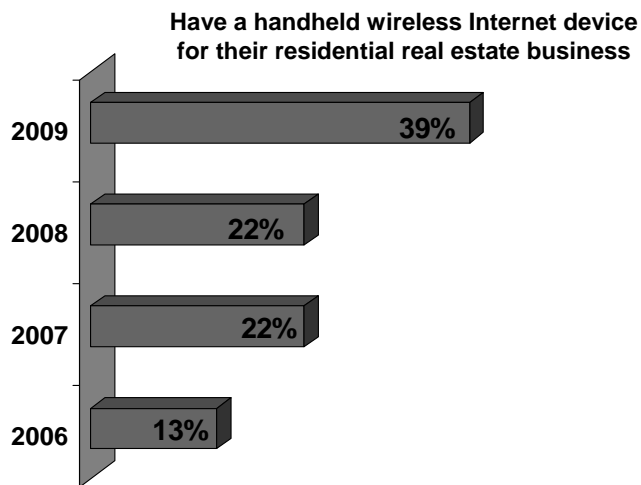


Selected listing of highest frequency responses.

Q: How do you use your laptop or tablet computer when you conduct residential real estate business in the field?



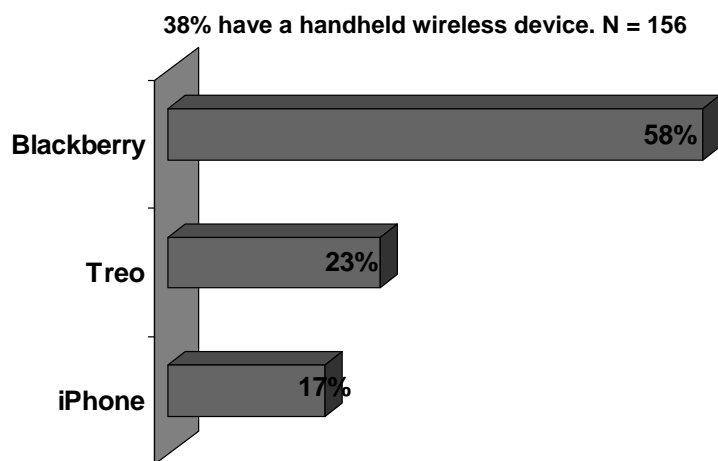
REALTORS® Going Wireless...



Q: Do you have a handheld wireless Internet device (e.g. Blackberry/Treo) for your residential real estate business?



Type of Handheld Wireless Device Used

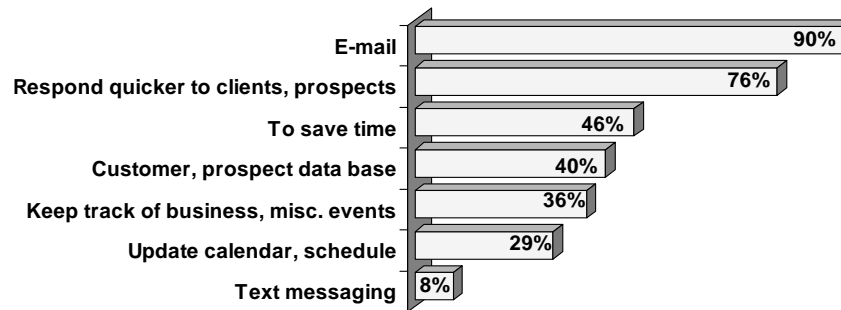


Q: What type of handheld wireless internet device do you own?



How REALTORS® Use Handheld Wireless Internet Device

N=156



Selected listing of highest frequency responses.

Q: How do you use your handheld wireless device in your residential real estate business?



cp4

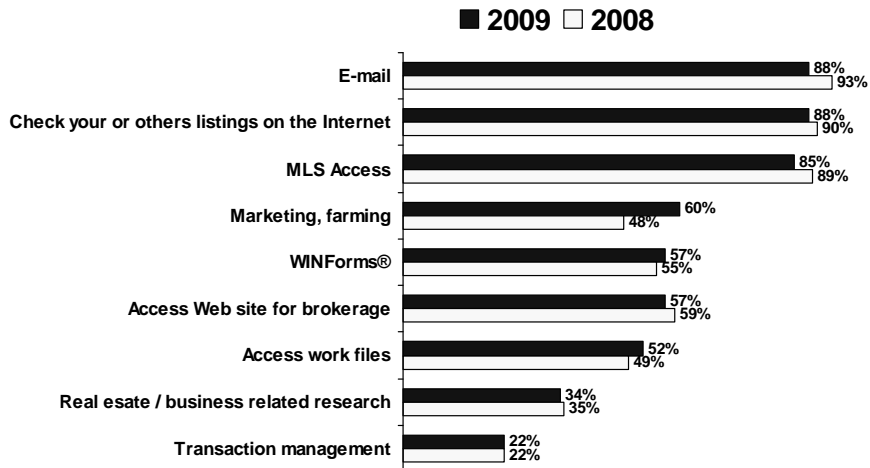
How REALTORS® Use the Internet -Average # of Different Uses-



Q: For what purposes do you use the Internet in your residential real estate business?



How REALTORS® Use the Internet



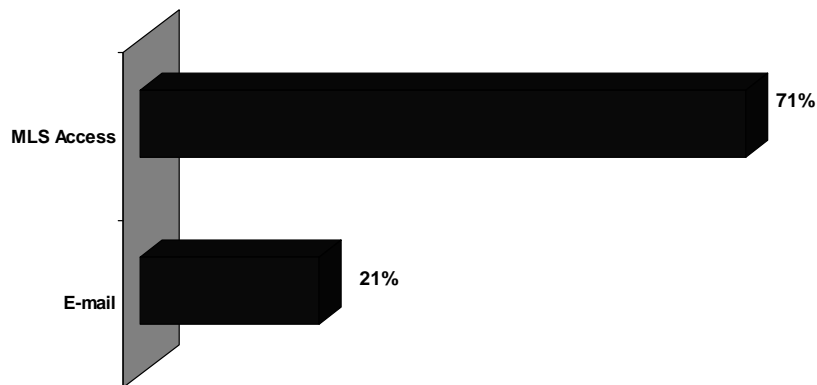
Selected listing of highest frequency responses.

Q: For what purposes do you use the Internet in your residential real estate business?



How REALTORS® Use the Internet

-First Mentions-



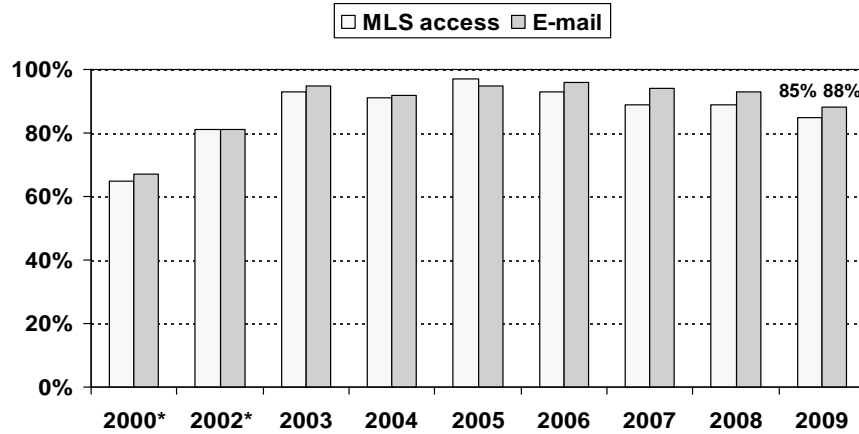
Selected listing of highest frequency responses.

Q: For what purposes do you use the Internet in your residential real estate business?



REALTOR® Top Uses of the Internet

-Consistent Trend-



*Source: C.A.R. Member Profile Survey

Q: For what purposes do you use the Internet in your residential real estate business?



How REALTORS® Use the Internet

-Historical Trend-

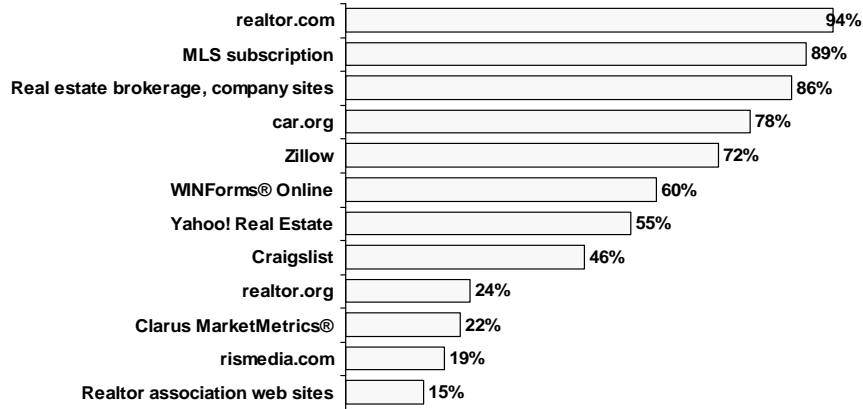
	2003	2004	2005	2006	2007	2008	2009
E-mail	95%	92%	97%	96%	94%	93%	88%
Check your or others listings on the Internet	83%	83%	94%	91%	91%	90%	88%
MLS Access	93%	91%	95%	93%	89%	89%	85%
Marketing, farming	10%	70%	84%	87%	86%	48%	60%
Access web site for your brokerage	63%	63%	74%	73%	76%	59%	57%
WINForms®	-	-	-	-	-	55%	57%
Access work files	36%	36%	67%	73%	72%	49%	52%
Real estate or business related research	58%	60%	61%	58%	59%	35%	34%
Transaction Management	-	-	-	-	-	22%	22%
Online Listings	-	-	-	-	-	20%	21%
Replace the fax machine	-	-	-	-	-	14%	15%
Personal web page	0%	0%	21%	23%	22%	2%	11%

Selected listing of highest frequency responses.

Q: For what purposes do you use the Internet in your residential real estate business?



Online Sources Used to Get Information About Real Estate



Selected listing of highest frequency responses.

Q: What on-line sources do you use to get information about real estate?



REALTOR® Online Resources for Real Estate Information

-Historical Trend-

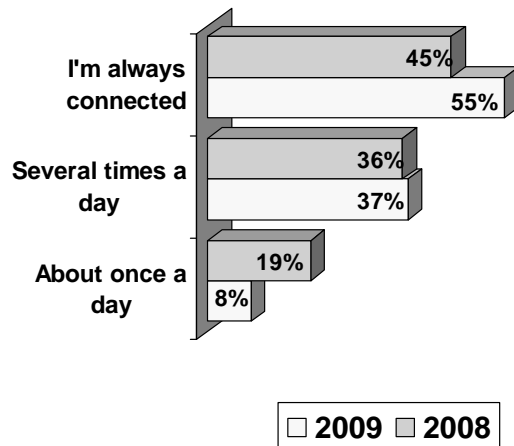
	2004	2005	2006	2007	2008	2009
REALTOR.com	50%	84%	86%	80%	87%	94%
MLS Subscription	76%	75%	76%	76%	89%	89%
Office or Company Web site	57%	59%	73%	73%	78%	86%
C.A.R. Web site (car.org)	78%	76%	71%	52%	67%	78%
Zillow.com	-	-	-	58%	68%	72%
WINForms® Online	17%	13%	11%	10%	21%	60%
Yahoo! Real Estate	-	-	-	22%	26%	55%
Craigslist.org	-	-	-	41%	32%	46%
NAR Web site (realtor.org)	57%	59%	37%	18%	22%	24%
Clarus MarketMetrics®	-	-	-	-	-	22%
RIS Media	-	-	12%	12%	20%	19%
Local Association Web site	74%	68%	71%	72%	35%	15%

Selected listing of highest frequency responses.

Q: What online sources do you use to get information about real estate?



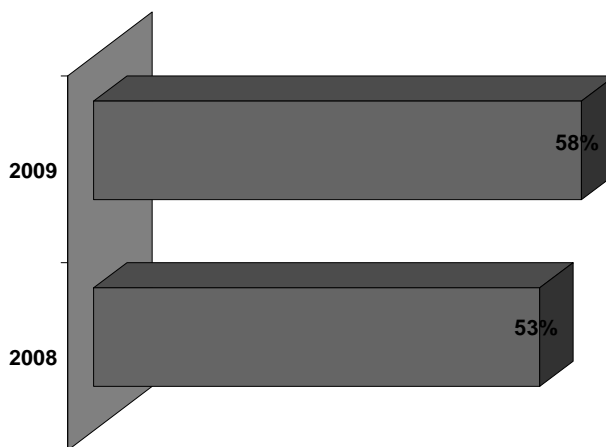
Frequency of Internet Use for Real Estate Business



Q: How often do you go online for your real estate business?



REALTORS® Have Personal Web Sites

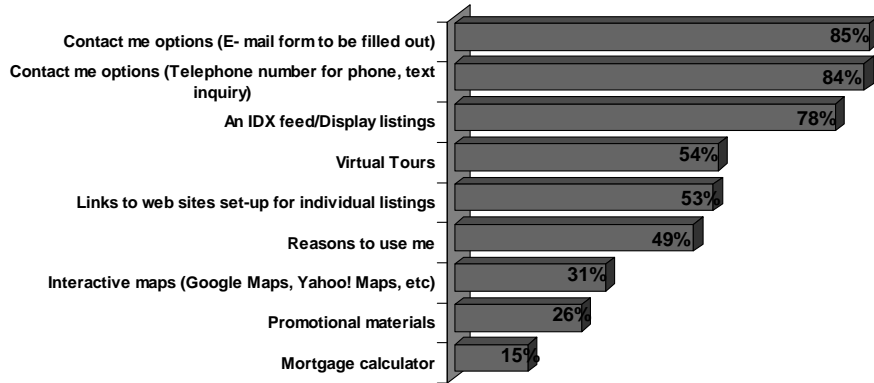


Q: Do you have a personal real estate related web site?



Features on REALTORS®' Web Sites

N=232, Unaided Responses

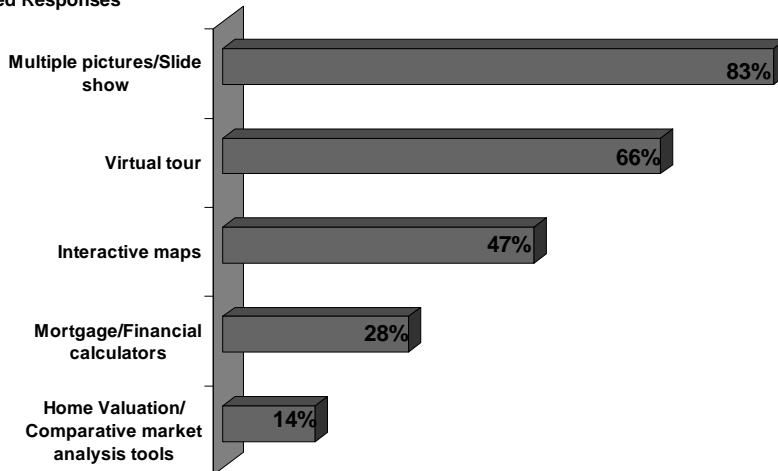


Q: What features do you have available on your personal real estate related web site?



Features REALTORS® Use for their Online Listings

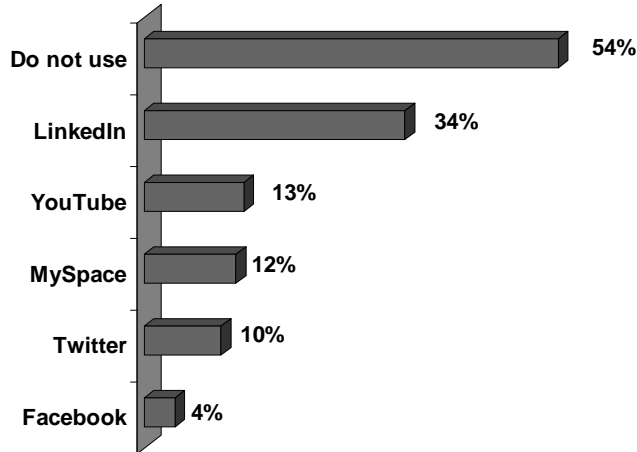
Aided Responses



Q: Which of the following do you typically include when you post your property listings on the Web?



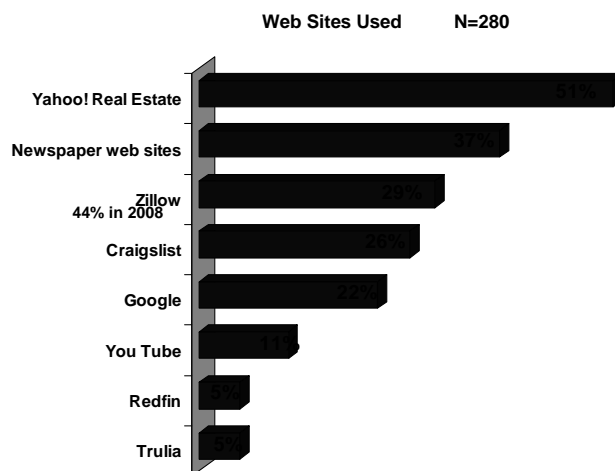
Social Networking Websites Used for Real Estate Business



Q: Which social networking websites do you use in your real estate business?



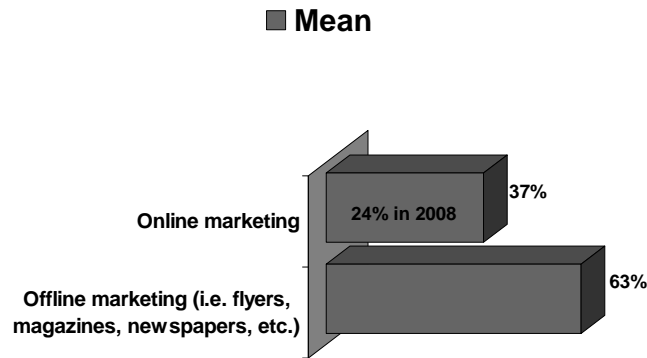
70% of REALTORS® Promote their Listings on Search Engines & Classified Web Sites



Q: Do you promote your listings on search engines and classified web sites?



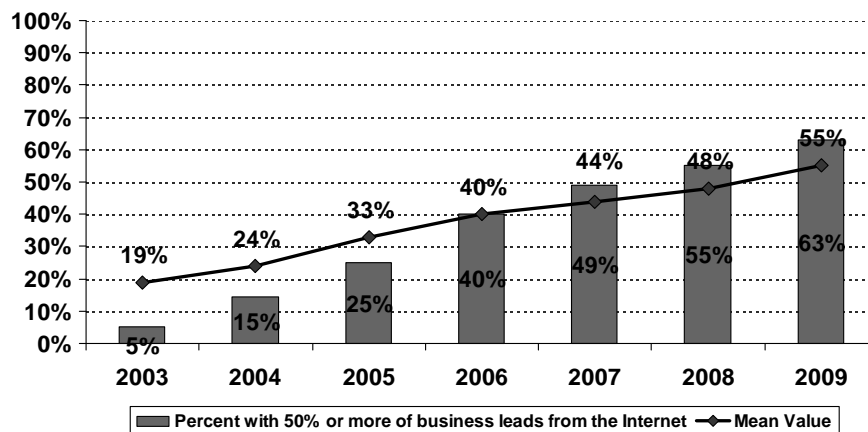
Allocation of REALTOR® Marketing Budget



Q: What percentage of your ad budget is dedicated to online market and offline marketing?



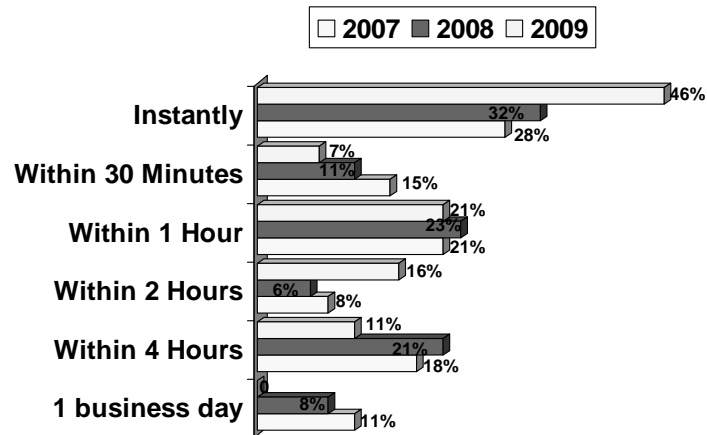
Percentage of Business Generated from the Internet



Q: What percentage of your real estate transactions in the past 12 months originated with an Internet contact?



Average Response Time to Client E-mails

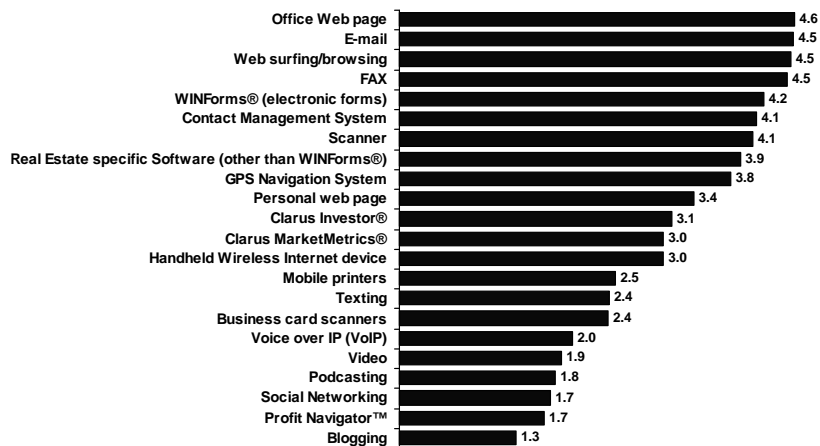


Q: What is your average response time to e-mails from clients?
How often do you answer emails from clients?



Average Frequency of Use of Technological Tools

(Point Scale: 5 = use all the time; 1 = never use)



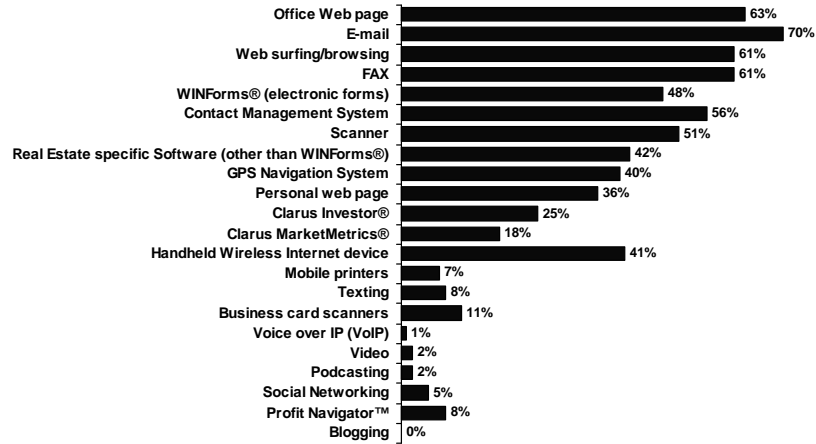
Q: Please rate how frequently you use the following technology tools on a five-point scale where five is all the time and one is never.



cp6

Most Frequent Use of Technological Tools

Members Who Gave a Rating of "5" (Use All The Time)



Q: Please rate how frequently you use the following technology tools on a five-point scale where five is all the time and one is never.



cp7

REALTOR® Technology Usage

Percent of REALTORS® Who "Use All the Time"

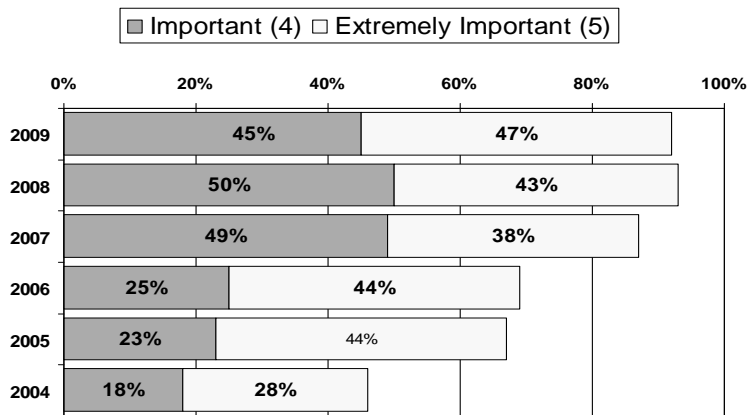
	2003	2004	2005	2006	2007	2008	2009
E-mail	53%	57%	55%	59%	68%	69%	70%
Web surfing/browsing	39%	36%	45%	46%	61%	62%	61%
Office Web page	31%	33%	32%	41%	54%	57%	56%
Contact Management System	n.a.	41%	41%	45%	53%	54%	48%
WINForms®	27%	27%	38%	35%	48%	50%	51%
Scanner	50%	51%	48%	18%	48%	49%	51%
Real Estate Software (not WINForms®)	n.a.	n.a.	36%	27%	34%	38%	42%
GPS Navigation System	n.a.	n.a.	n.a.	19%	32%	35%	40%
Handheld Wireless Internet device	n.a.	n.a.	5%	4%	25%	25%	41%
Personal Web page	38%	49%	48%	45%	17%	19%	36%

Q: Please rate how frequently you use the following technology tools on a five-point scale where five is all the time and one is never?



Importance of Internet Marketing

-For Real Estate Business-



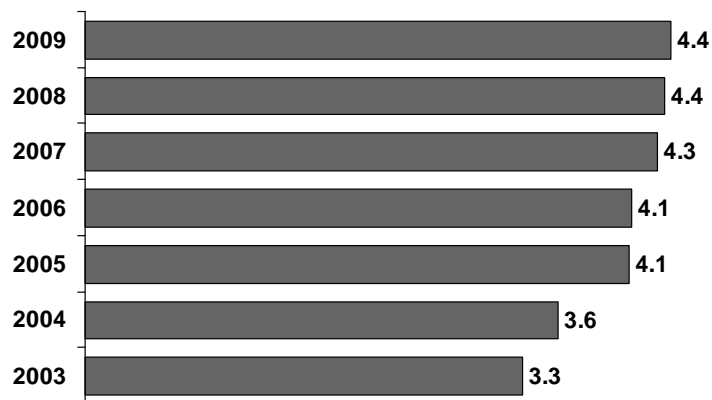
Q: Please rate the level of importance of the Internet in the marketing and promotion of your real estate business where 5 is "extremely important" and 1 is "not at all important."



Importance of Internet Marketing

-Mean-

5-Point Scale: 5 = "Extremely Important"; 1 = "Not at all Important"



Q: Please rate the level of importance of the Internet in the marketing and promotion of your real estate business where 5 is "extremely important" and 1 is "not at all important."



Self Rating of Technological Knowledge

Mean on 5 point scale: 5 = extremely savvy; 1 = not at all savvy

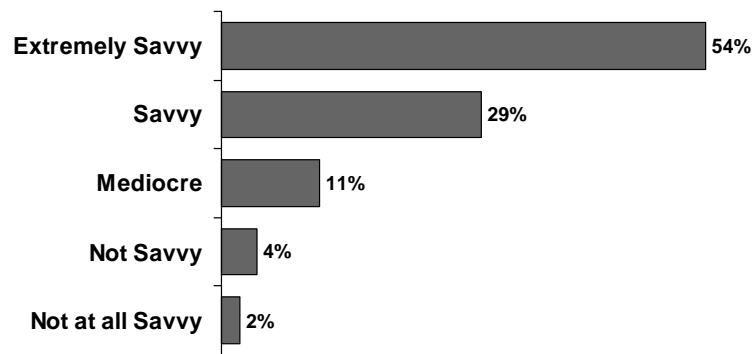


Q: Overall, how would you rate yourself in your technological knowledge?



cp9

REALTORS® Rate Themselves -Technological Knowledge-

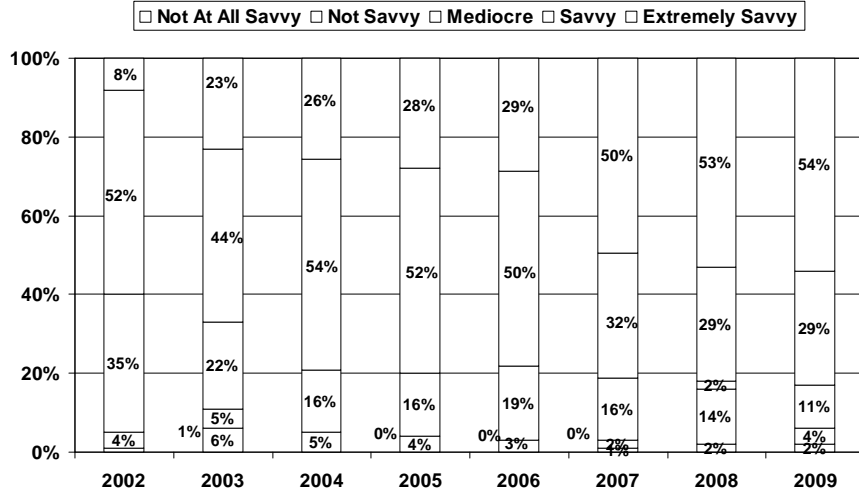


Q: Overall, how would you rate yourself in your technological knowledge?



REALTORS® Rate Themselves

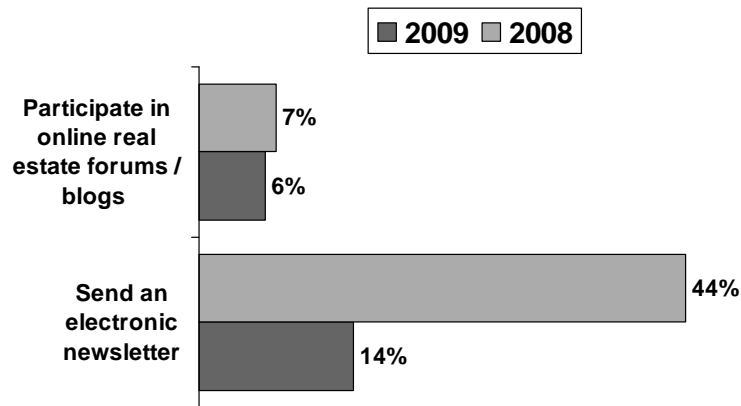
-Technological Knowledge Historical Trend-



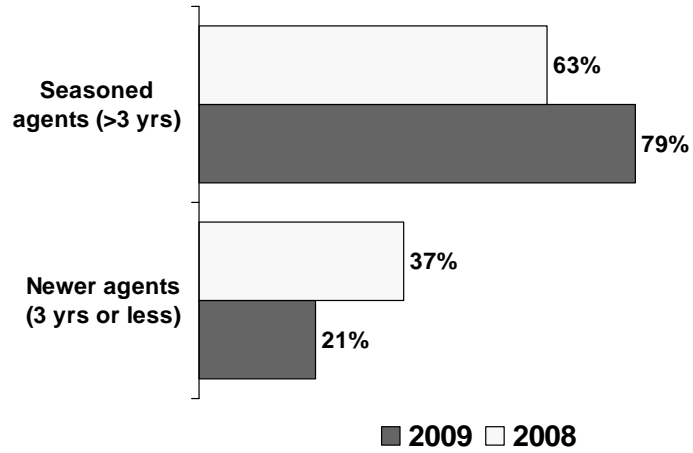
Q: Overall, how would you rate yourself in your technological knowledge?



Usage of Various Tools



Years as a Real Estate Agent



Q: How many years have you been a real estate agent?



Years as a Real Estate Agent

