



DO REALTOR ASSOCIATIONS OFFER MORE THAN JUST A BILL?

Survey: Vast majority of members do not feel membership is a choice

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KEY FINDINGS:

- *Nearly 7 in 10 respondents felt they did not have the option of not joining a Realtor association.*
- *Usage and satisfaction ratings of association services were fairly high, though a substantial minority of respondents were dissatisfied.*
- *More than half of respondents said they used or benefited from four association services: the MLS, professional development, industry news and information, and lockboxes.*
- *Respondents had many suggestions for how local, state and national associations could improve. They asked for increased standards for professionalism and to be a Realtor; better technology offerings and tech guidance; higher-quality options for education; better communication of association services; the option to pay for the MLS without having to join a Realtor association; and generally more value for the dues paid.*
- *The vast majority of respondents said they would be willing to pay more in association dues if the National Association of Realtors raised the requirements of becoming a Realtor and there were fewer members. But respondents varied widely on how much more they would be willing to pay.*
- *More than 4 in 10 respondents would like their local association to merge with a neighboring association, citing economies of scale and increased efficiency, among other reasons. Just over 3 in 10 do not want their association to merge with another, though some of these respondents said they would prefer their MLS merge with a neighboring MLS.*



Recent observers have noted the often-coercive nature of membership in a Realtor association.

Real estate agents and brokers want to do business, and in order to do that, most need access to their local MLS. Most of the nation's 800 or so MLSs are operated by Realtor associations, and association membership is often required for MLS access.

The three-tiered structure of the Realtor organization usually means real estate professionals then pay dues to three Realtor associations: local, state and national. MLS dues are usually charged on top of association dues.

There are 1.2 million Realtors nationwide. How does this lack of choice affect how agents and brokers feel about their Realtor associations?

How many don't actually have a choice?

What would agents and brokers change about their Realtor associations if they could?

Who responded?

Inman surveyed 873 real estate professionals between February 25, 2016 and June 24, 2016. The vast majority of responses came in at the end of February. More than 6 in 10 were either agents or broker associates and 26 percent were broker-owners or managing brokers. The remaining 12 percent were appraisers, agent or broker support staff or "other."

- Productivity levels between respondents varied. Just over half of respondents, 51 percent, closed 20 or fewer transactions in 2015. Just a under a third closed between zero and 10 deals.
- A third closed more than 30 transactions last year. Nearly a fifth of respondents closed more than 50.
- More than 9 in 10 respondents (92 percent) belonged to all three tiers of the Realtor organization: local, state and national. Nearly 6 percent didn't belong to a local association but did belong to a state and national association. This means all but 3 percent of respondents belonged to a Realtor association.

- Just over a quarter of respondents, 26 percent, belonged to more than one local Realtor association. The remainder only belonged to one.

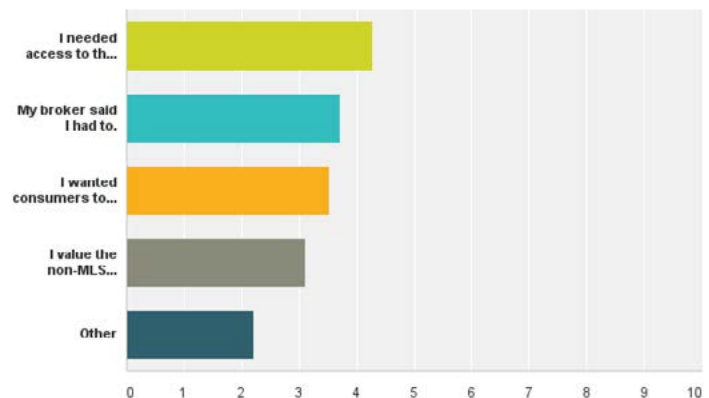
'I needed access to the MLS'

When asked to rank the reasons they joined a Realtor association, 45 percent of respondents said their no. 1 reason for joining was "I needed access to the MLS and I can't join the MLS without belonging to the association."

- Just under a quarter (23 percent) said their no. 1 reason was "My broker said I had to." This means that more than two-thirds of respondents (68 percent) felt association membership was not a choice.
- Just 17 percent said their no. 1 reason for joining was "I wanted consumers to know that I adhere to a code of ethics." Just over 1 in 10 (12 percent) said their top reason for joining was "I value the non-MLS services the association provides."

Q6 If you do belong to any Realtor associations, what are the reasons you joined? (Please rank in order of importance, with "1" being most important.)

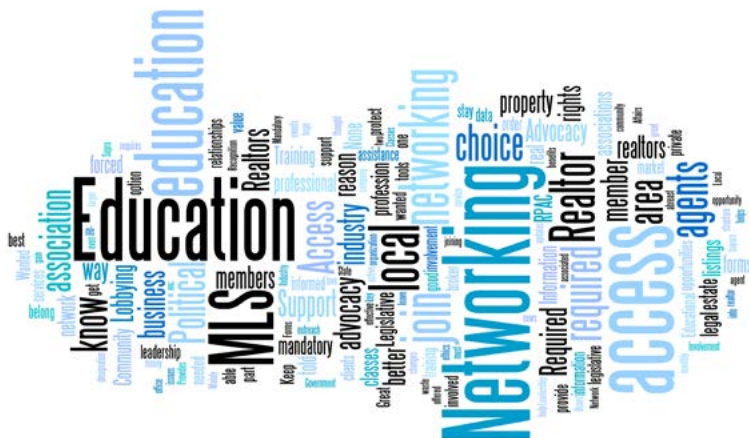
Answered: 405 Skipped: 468



This was further borne out when respondents were asked for other reasons why they joined a state/local Realtor association.

- Many continued to focus on membership as a mandate — one they sometimes appeared to resent — rather than a desired option, using

words like “required,” “forced,” “no choice” and “had to.”

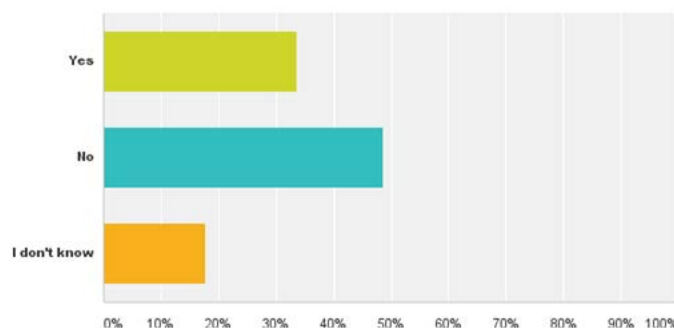


This word cloud includes respondents' answers to "Please name any other reason(s) why you joined a local/state Realtor association."

- Others cited networking, education and lobbying as reasons they joined. Some sample responses:
- “No other reason. I would leave the association and demand a refund if it wasn’t required.”
- “To have access to all the listings, active and sold to search for the buyers and sellers. I would not able to do a CMA [comparative market analysis] without the resource and tools that the MLS gives.”
- “None, totally forced for MLS access. Maybe if the association didn’t have the virtual monopoly, the market would require that they try harder for the ever powerful dollar. The only other value is the special interest lobbying, which isn’t a motivator to join because it’s a public good.”
- “It is ‘mandatory’ in our area. If your broker is a member, you have to join and joining an association is the only way to gain MLS access.”
- “It is a forced situation. If it were not so I, nor would any of my 300 agents, join. It is a waste of money.”
- “Our state association — education, legislative updates, they are awesom[e].”
- “It’s the best way to stay informed on changes to the law, keep unethical agents from participating in our local market.”
- “The relationships I have with fellow Realtors makes me a more effective advocate for

Q12 Can you join your local MLS without belonging to a Realtor association?

Answered: 356 Skipped: 517



my clients. Since I have invested in broker relationships, I am a more effective negotiator than someone who is unknown. This is a huge benefit to my clients either seller or buyer.”

When respondents were asked whether they could join their local MLS without belonging to a Realtor association, nearly half said “No.” A third said “Yes” and the remainder didn’t know.

- Nearly three-quarters of respondents said their association charged them a separate fee for the MLS while 17 percent said the MLS fee was included in association dues. Only 6 percent of respondents said their association did not provide MLS access.

To join or not to join

Agents and brokers may not have much of a choice when it comes to joining a Realtor association in general, but when it comes to which local association to join, they have their pick under NAR’s “Board of Choice” policy.

One caveat to this for primary membership in an association is that an agent’s brokerage must have a “designated Realtor” who is a member of that local association in order for the agent to join.

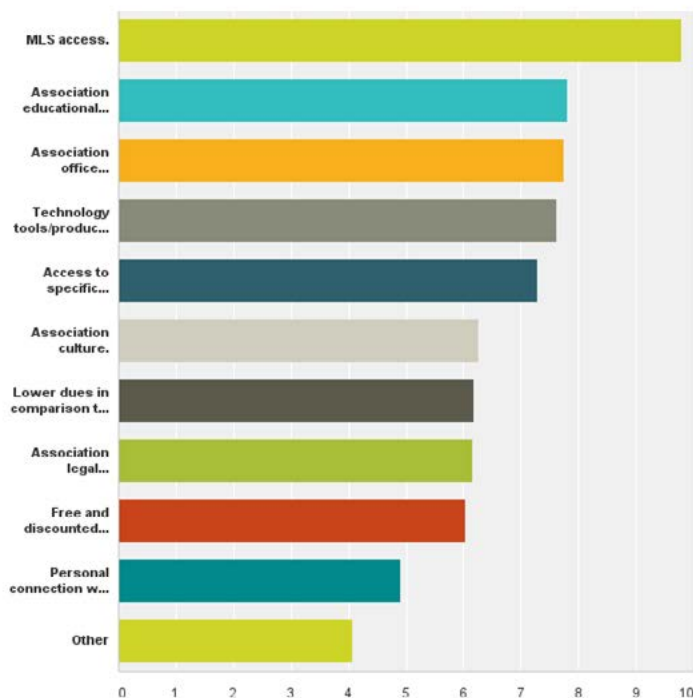
When survey respondents were asked to rank the factors that went into their consideration of which local association to join (or state association, if they did not belong to a local), “MLS access” was at the top, followed by “association educational offerings,”

“association office location,” “technology tools/products offered by the association” and “access to specific transaction forms.”

“Association culture,” “lower dues in comparison to neighboring associations,” “association legal resources,” “free and discounted products offered by the association,” and “personal connection with either a staff member or someone already belonging to the association” were lesser considerations.

Q8 When considering which local Realtor association to join (or state association if you do not belong to a local), please rank the following factors in order of their importance to you, with "1" being most important.

Answered: 405 Skipped: 468



For respondents who didn't belong to a Realtor association, when asked why, the top reason was “I’m not an agent, broker, or appraiser” followed by “I don’t need access to the MLS or I can join the MLS without being a Realtor” and “I don’t see the value.”

“I didn’t want to adhere to the MLS rules about how to operate my business” was a lesser consideration.

When asked to name any other reason for not joining a Realtor association, several cited the cost of membership, with some saying dues were “too expensive” or questioning the “costs compared to benefits.”

“Other than insuring lobby dollars remain for the homeowner interest tax deduction I see no benefit in becoming a Realtor. The term agent/broker associate/and Realtor are almost synonymous in the eye of the public,” said a broker associate who completed between 51 and 60 transactions in 2015.

A managing broker or broker-owner who closed 31 to 40 transactions last year said, “Maybe I am missing something. It is my understanding that we have to join our local association to have access to MLS. If that is not the case, we want to know that as we have 80 agents that do not want to join. They do not see the value and neither do we as broker-owners. This is no longer acceptable.”

Which services do Realtor associations offer?

When asked which services their Realtor association(s) offer, the 10 services most commonly offered were:

- Professional development, i.e. continuing education/designation/certification courses, conferences (Offered by 88 percent of associations)
- Political advocacy/lobbying (79 percent)
- Tech training and support (72 percent)
- Networking events (72 percent)
- Industry news/information (72 percent)
- Conflict or complaint resolution/arbitration/mediation (72 percent)
- MLS (66 percent)
- Lockboxes (66 percent)
- Market research and statistics (65 percent)
- Transaction forms (64 percent)

Other services offered by more than half of associations included NAR's Realtors Property Resource (RPR) national property database, legal resources, an affiliate program, an online Realtor directory, and a professionalism hotline for ethics, transactional or professional standards questions.

Some respondents seemed to be unaware of some of the services offered by Realtor associations. For instance, all local Realtor associations are supposed to offer "consumer outreach" and an "interactive website detailing the association's programs and resources" per NAR's core standards.

But only 50 percent and 44 percent of respondents, respectively, said their association provided these services. It's also possible some associations are out of compliance.

Still, only 23 percent said their Realtor associations offered a "free or discounted transaction management platform" even though NAR made a deal with zipLogix last year to provide such a platform as a free member benefit to all 1.2 million Realtors. That benefit went live in January.

Only 36 percent of respondents said their Realtor associations offered free or discounted tech products.

Of the services that their Realtor associations offered, the top 10 services respondents said they most used or benefited from were:

- MLS (used by 71 percent of respondents)
- Professional development, i.e. continuing education/designation/certification courses, conferences (71 percent)
- Industry news/information (51 percent)
- Lockboxes (51 percent)
- Market research and statistics (48 percent)
- Transaction forms (46 percent)
- Political advocacy/lobbying (44 percent)
- Realtors Property Resource (RPR) national property database (43 percent)
- Tech training and support (43 percent)
- Networking events (40 percent)

Of the services that their Realtor associations offered, the top 10 services respondents said they did not use or benefit from were:

- Free or discounted insurance benefits
- Credit union
- Free or discounted tech products
- Opportunity to participate in REach incubator program
- Free or discounted transaction management platform
- Legal resources
- Affiliate program
- Consumer outreach
- Association listing website for consumers
- Referral networks
- Only 15 percent said they did not use or benefit from the MLS.

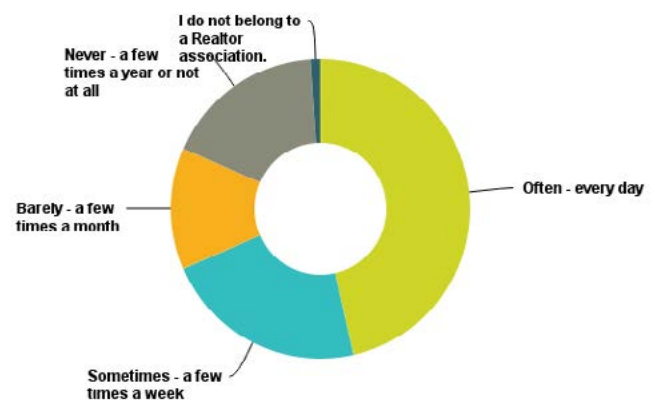
Usage and satisfaction is pretty high

When asked how often they use the services provided by their Realtor associations, the biggest share of respondents (46 percent) said, "Often — every day."

The next biggest share (22 percent) said, "Sometimes — a few times a week." That means nearly 7 in 10 Realtors use their association services at least a few times a week. About 3 in 10 said they "barely" or "never" use the services.

Q28 I use the services provided by my Realtor association(s):

Answered: 282 Skipped: 591



Respondents rated their Realtor association services more positively than negatively. On a scale of 1 to 10, with 1 being "very dissatisfied" and 10 being "very satisfied," 55 percent rated their association

services at 7 or higher. Just over a quarter, 26 percent, gave their association services a score of 4 or lower, however.

How can local associations improve?

Respondents were asked how their local, state and national associations, respectively, could improve their services.

On the local level, many respondents asked for better technology offerings, more and better tech training, and higher quality education in general.

- “I hate to say it, but if I’m looking at homes out of our area, I use Redfin.com. Even if I feel their model is hostile to Realtors in general, they do serve consumers with an extremely user-friendly interface. If we could combine our MLS accuracy with Redfin’s wealth of information all on one page, we’d have something!” said one broker associate.
- “They offer us 15 products that all do the same thing. Nothing is uniform. Quit supporting all these outside companies that provide the same half-measured, incomplete products,” said one broker-owner or managing broker.
- “Offer more relevant services for all size brokerages. Much of what is done is only beneficial to small brokerages,” said another.
- “More classes on professionalism, technology and innovative marketing,” said one agent.
- “Better discounts on tech products offered by vendors [and] better discounts on med[ical] insurance (better than Obamacare, otherwise it doesn’t matter),” said another agent.
- “Improve the MLS and [the] way it works,” said another.
- “Provide us with a off-MLS marketing solution to make pre-marketing a home as a ‘Coming soon’ much easier. It can take up to three weeks to prepare a home for the MLS (photograph, stage etc.) and I need to start marketing immediately,” said one company CEO.

Many said the association should help improve the professionalism of their peers and their profession’s image in the eyes of consumers.

- “Remove unqualified licensees from practicing,” said one broker-owner or managing broker who closed 51 to 60 deals in 2015.
- “Word harder at advancing professionalism, ethics and high standards backed by education, making the name ‘Realtor’ mean more than the same as ‘agent,’” said another broker-owner or managing broker.
- “Address issues with rogue agents who hurt our image,” said a broker associate who closed 11 to 20 deals last year.
- “Enforcement of code of ethics and make the reporting an easier process rather than the cumbersome paperwork we have to fill out. Also placing heavy fines on violations would deter agents from doing shady stuff,” said an agent who closed more than 60 transactions in 2015.
- “Make competency part of the requirement to be on the board. [My board] only has agents with lots of time on their hands running it and they have no idea what they are doing,” said a broker-owner or managing broker who closed 21 to 30 deals in 2015.
- Respondents also asked for more and better communication from associations and for more networking opportunities.
- “The services are great but most don’t know all that are available,” said a broker-owner or managing broker who completed 41 to 50 transactions in 2015.
- “Our association is continually changing to meet the needs of the members. The issue is getting the members to use the services,” said an agent who is also a director for the California Association of Realtors.
- “Ask members what they want/need before putting new products/programs in place. The members should have a voice — not just the [board of directors] and CEO/staff,” said one agent.
- “Answer [the] phone when I call. [Create] a Managing Broker Hotline. I won’t abuse it, but when I have a question it’s big-time annoying

waiting for a response to voicemail,” said one managing broker.

- “We have become too big to provide personalized attention to members on the local level. There is no local association email providing information — changes in contracts, deaths of members, warnings about issues of concern — that we used to get. It would be nice to feel like a community again. Stop spending so much money on leadership parties, retreats, etc. and cut the fees for the members instead,” said another broker-owner or managing broker.
- “Our particular association could improve its focus on customer service and putting members first — catering to members and better meeting their needs — including communication. Better organization and advance planning too,” said another broker-owner or managing broker who closed more than 60 deals in 2015.

Still others wanted their associations and/or their MLSs to merge. Some wanted to be able to just purchase access to the MLS without having to pay association dues.

- “Allow the MLS to be available without being forced to join the association. This is especially helpful for commercial practitioners as there is very little value to being a member of the association,” said a broker-owner or managing broker who closed more than 60 deals last year.
- “Consolidate MLS with other local MLSs,” said another broker-owner or managing broker.
- “Join with other associations in my county,” said a broker associate who closed 11 to 20 deals in 2015.
- “ONE association, one MLS, ONE BILL for [Connecticut]. The locals are not doing enough for the costs,” said a broker associate who closed 51 to 60 deals in 2015.
- “By not being so narrow-minded. In our area, agents want a combined MLS and the associations do not,” said another broker associate.

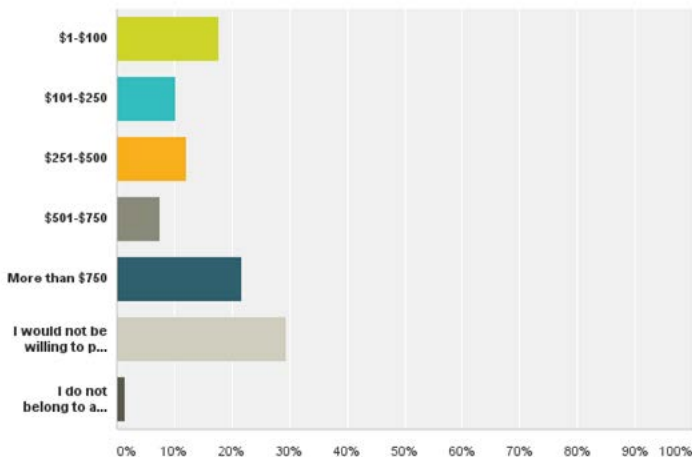
- “I just want the MLS and [to] pay less,” said another.
- And many, though not all, asked for their fees to be reduced.
- “Be cheaper. \$1,200 a year is a lot for a little,” said one agent who closed zero to 10 deals in 2015.
- “Provide something other than a bill every year. Provide support and products that help my business,” said another such agent.
- “We pay \$1,000 per year and then we are charged additional money to attend classes. That doesn’t make sense to me,” said an agent who closed 21 to 30 deals last year.
- “I feel the fees I am required to pay are too high for the services I am given or that I utilize,” said a broker associate who closed zero to 10 deals in 2015.
- “I personally get nothing from membership — it is required by my firm and to use the forms on the MLS,” said a broker associate who closed 31 to 40 deals in 2015.
- “Stop being the money-hungry, stealing, self-supporting thieves that they are. Do not care about agents and brokers, it is about their money. SCAMMERS,” said a broker associate who closed 31 to 40 deals last year.
- “Not make it so cheap for everyone. They’d prefer to see 10,000 agents that have no clue what they are doing (as long as they pay dues) vs. 1,000 competent ones,” said a broker associate who closed 11 to 20 deals in 2015.

That last commenter is not alone in asking for higher fees.

When asked how much more in association dues respondents would be willing to pay if NAR raised the requirements of becoming a Realtor and there were fewer members, 29 percent said they would not be willing to pay more, but the rest said they would be willing to pay more. The next biggest share — 22 percent — said they would be willing to pay more than \$750 in additional dues.

Q31 How much more in association dues would you be willing to pay if the National Association of Realtors raised the requirements for becoming a Realtor and there were fewer members?

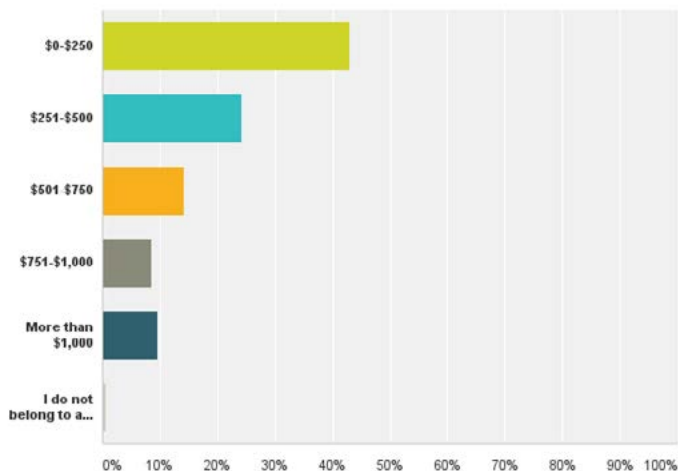
Answered: 282 Skipped: 591



Raising dues might be tough given the perceived value of Realtor association services, however, When asked how much respondents thought their Realtor associations' services are worth per year, 43 percent said between zero and \$250. Just under a quarter (24 percent) said they thought the services were worth \$251 to \$500. Only 10 percent said they thought the services were worth more than \$1,000 per year.

Q30 How much do you think your Realtor associations' services are worth per year?

Answered: 282 Skipped: 591



Many respondents also appeared to be happy with the services their local association provides and did not offer suggestions for improvement.

- “I really don’t know. We’re the largest in North America and have over 100 products and services that are provided at NO cost to us, including Inman News!” said a broker-owner or managing broker who closed 11 to 20 deals in 2015.
- “Continually strives and improves every year,” said an agent who closed 41 to 50 transactions last year.
- “Continue doing what it’s doing. My AOR rocks,” said a broker-owner or managing broker who closed 21 to 30 deals last year.
- “I am happy with what they are providing for the cost,” said a broker associate who closed zero to 10 transactions in 2015.
- “Our association is very aggressive (in the best possible sense) at seeking out information, products and services that will benefit its membership,” said an agent who closed zero to 10 deals last year.

How can state associations improve?

Submitted survey comments overall indicated that respondents were more satisfied with their state association than their local association.

Some respondents asked that their state associations encourage MLS and association mergers, including some that asked for a statewide MLS. Others asked that they provide better and/or free educational offerings.

But more asked for better communication between state associations and their members. Some were not aware of what their state association did that differentiated it from their local and national associations.

- “The best thing my state association did was to create a ‘road show’ to visit each local board and educate members about state association services. I feel this improved the perception of association because members became better educated about services offered. I think it also provided a great opportunity for associations to interact with members face to face which helps members feel appreciated,” said one agent.

- “Tell me what services are available. Mentor programs, training, and networking events for new agents,” said another.
- “Keep members better informed of what [the] state [board of directors] is doing [and] how is it relevant to regular members,” said a broker-owner or managing broker who closed 31 to 40 deals in 2015.
- “I have no idea what services my state association provides. I get a magazine periodically that has a lot of pictures of association leadership but it means nothing to me. The best thing they could do is be more vocal about what they offer and why I should care to be a member,” said another such broker.

How can the National Association of Realtors improve?

Many respondents found NAR’s promotion of the Realtor brand — which members pay a \$35 annual assessment for — lacking and tied the status of the brand to a lack of standards for Realtor membership.

- “Attach a REQUIRED number of annual transactions needed to retain the ‘Realtor’ designation. Just paying dues doesn’t make one a professional Realtor. There’s a real need to elevate our profession above that of a used car salesperson. The public deserves better,” said an agent who closed 31 to 40 transactions last year.
- “The local joke in Phoenix is that they are the National Assassination of Realtors. They need to increase the standard in our industry and we do not see them doing that. They are just concerned about the number of Realtors, not the QUALITY,” said a broker-owner or managing broker who closed 11 to 20 deals in 2015.
- “NAR should do more to advance the name Realtor. But fewer professionals means fewer dollars, so it’s self-fulfilling: the more members, the more money they have to use,” said another broker-owner or managing broker.
- “Stop soliciting me for money at every turn. RPAC [the Realtor political action committee]?

Last time I checked, NAR is already a lobbying entity. Help brokers raise the bar on the brokerage/agent level. This industry needs it,” said another.

- “Reduce board count. Stop wasteful spending. Increase level of competency for licensees. Protect your people before they jump to Zillow Association of Agents,” said yet another.
- “Adjust the messaging to the consumer that creates a value proposition beyond the information being accurate. Accuracy is baseline — give them more,” said broker or agent support staff person.
- “Raise the entry and retainment bar. Cut the massive amounts of dead wood agents,” said a broker associate who closed 31 to 40 transactions last year.

Others expressed hostility in regards to the value received in exchange for the money forked over by agents and brokers as dues.

- “Provide more value for the large amount of money we [as] Realtors are forced to pay if we want to play,” said a broker associate who closed 21 to 30 transactions last year.
- “Reduce staff and administration by 10 percent each year going forward to trim the layers of nepotistic fat from its ranks until you reach a point where members receive better value. Stop viewing members as wallets that feed the administration,” said a broker-owner or managing broker who closed 11 to 20 deals in 2015.
- “Be more open with all of its members. We are all beginning to feel like we are just money pits for the various associations to reach into,” said another such broker who closed 51 to 60 deals in 2015.
- “BIG machine that is hard to maneuver. They do a great job at advocacy, but other things I wonder if they are really looking out for their members or for themselves. I think sometimes they aren’t in touch with what really goes on in real estate,” said another.

Some respondents hoped for a better deal in regards to NAR's consumer-facing website, realtor.com, which is operated by a third party, Move Inc.

- "Own Realtor.com," said a broker-owner or managing broker who closed 11 to 20 deals in 2015.
- "Better services with realtor.com and having it be more affordable," said a broker associate who closed 21 to 30 transactions last year.
- "Don't know. Buy realtor.com back and manage it so it is more popular than Zillow?" said another broker associate.
- "Fight harder against the syndicating websites (Zillow, Trulia, Homes.com, realtor.com) that sell our ads back to us," said another.

Respondents didn't always agree on how active their national association should be.

- "Exert more control over the local boards and make them more competent," said a broker-owner or managing broker who closed 21 to 30 deals in 2015.
- "Stick to the lobbying and quit shoving core standards down our throats," said another such broker.
- "The National Association is mandating us to death. It appears to all of us that have been around for a long time that they are trying to take over and remove the LOCAL out of real estate," said a broker associate who closed more than 60 transactions last year.
- "Keep adding more services like zipForms, Upstream etc. that equalize the playing field so that ALL Realtors can have access to technology no matter what size firm they are in. I see our local MLS as almost obsolete and would like to see us head to a regional MLS," said a broker-owner or managing broker.
- "I'm excited and troubled by AMP [Advanced Multilist Platform]/Upstream. I think investing in such should've been more upfront. We hear a lot, then next to nothing except speculation. I'd like to know more about development, timetables, etc. The news flows slowly and

local associations making contract decisions are left wondering. Same with the [ZipLogix] announcement. We just signed a three-year agreement with Instanet before the announcement," said another such broker.

Others asked for more diversity: "bring in female leadership" and "attract youth," two agents said, respectively.

Some real estate pros would like to see more localized training from NAR.

- "NAR has a great annual conference, but it's once a year and sometimes across the country so I can't always make it. Smaller events scattered throughout the country would be great," said a broker-owner or managing broker who closed 31 to 40 transactions last year.
- "More local training opportunities in person. There are a ton of benefits — too many to get information and use wisely via online," said an agent who closed 11 to 20 deals in 2015.

And others just wanted NAR to be more efficient in its service offerings.

- "Scale back the duplicate services that can be accessed elsewhere with greater benefits," said a broker-owner or managing broker who closed more than 60 deals in 2015.
- "Ask members what they want/need by way of surveys, etc. There is so much money that is spent on programs that are duplicated when there is opportunity to add valuable resources agents/members want," said an agent who closed zero to 10 deals last year.

Mixed reviews on tech offerings

When it came to the tech tools and products offered by Realtor associations, reviews were mixed. On a scale of 1 to 10, with 1 being "very dissatisfied" and 10 being "very satisfied," 45 percent of respondents gave their association tech tools a rating of 7 or higher. Thirty percent rated the tech tools at 4 or lower.

When asked what share of their tech tools their Realtor associations pay for or provide, 45 percent

of respondents said “less than half” and 34 percent said “none.” Only about 12 percent said “more than half” or “all.”

When asked what share of their tech tools they purchase at a discount provided or arranged by their Realtor association(s), just over half of respondents — 51 percent — said “None.” Nearly 38 percent said “less than half.” Less than 1 in ten said “half” or “more than half.”

When asked how Realtor associations could improve their technology offerings, respondents complained about outdated tools.

Some tied that lack of cutting-edge tools to corruption, intimating that growth of the association’s funds, not members’ best interests, determine what members are offered.

- “Keep up with technology that is useful to the consumer as well as the agent. Just creating tech tools to create tech tools is a waste of dues and resources,” said a broker or agent support staff who closed zero to 10 deals in 2015.
- “Catch up with the 21st century. Offer more online and webinar courses,” said a broker-owner or managing broker who closed more than 60 deals in 2015.
- “Code our MLS so it doesn’t look and perform like it was designed in 1997,” said a broker-owner or managing broker who closed 21 to 30 deals last year.
- “Web-based tools that are at least comparable to what consumers see and use on Zillow,” said a broker or agent support staff who closed 11 to 20 deals in 2015.
- “Just be staying up to speed with new technology. Vendor contracts are signed for long periods of time to secure better pricing only for better, more robust tech platforms to emerge during that period. It can be easy to end up locked in a deal with dated tech products,” said an agent who closed zero to 10 deals in 2015.
- “The tools are redundant and most are flawed in one way or another making them tedious to use. Many of the tools are seriously flawed with automatic technology creating errors in reports

and resulting in a big waste of time or many hours of tweaking. We need to come together and quit selling out. It [is] almost corrupt and criminal what they try and pawn off on us and do with our information,” said a broker-owner or managing broker who closed zero to 10 deals in 2015.

- “Better systems. The online form system provided is very outdated and cumbersome to use,” said an agent who closed 21 to 30 deals in 2015.
- “I think state and national (local does nothing) only offer what they can get a ‘deal’ on and make it seem like they are offering real value to an agent. Agents aren’t stupid! Provide something of real value. Not something that someone else PAYS the association to be able to offer a ‘discount.’ What a racket,” said a broker associate who closed 21 to 30 deals last year.
- “If you don’t understand tech then don’t make tech decisions,” said a broker-owner or managing broker who closed 51 to 60 deals in 2015.

Several respondents wanted to be able to have a voice in their association’s tech offerings and others wanted guidance from their association on sorting through the morass of offerings.

- “We have multiple programs that do basically the same thing. Choose one of each that works properly and cut out the rest. Before doing that, poll your agents to see what they want and what is important to them,” said a broker-owner or managing broker who closed zero to 10 deals in 2015.
- “Provide more reviews and better discounts,” said a broker-owner or managing broker who closed zero to 10 deals in 2015.
- “Help us sort through the vast offerings out there and help us decide which are most cost effective and easiest to use,” said a broker-owner or managing broker who closed 11 to 20 deals last year.

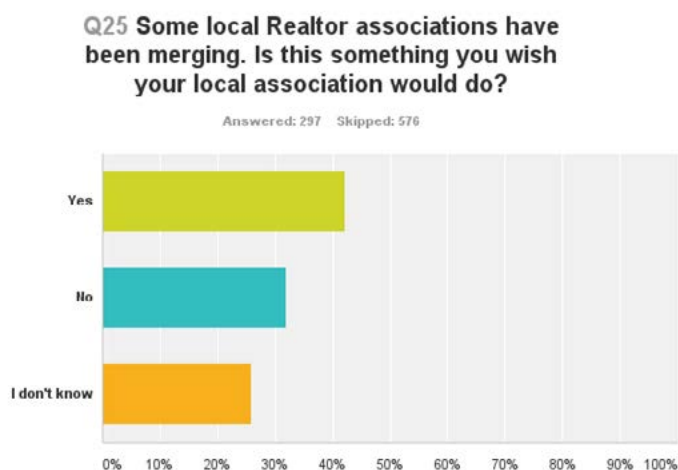
- “We need more staff at the help desk to answer questions. We got a new system almost two years ago and there are still things that are not easy to use, still hiccups in the system. Sometimes calling the help desk is anything but helpful because you have to leave a message and it could take days to get a return call,” said a broker-owner or managing broker who closed 31 to 40 deals last year.
- “Poll members to find out what agents want/need and monitor usage of offerings to see if they are worth the money spent on them,” said an agent who closed zero to 10 deals in 2015.

More want mergers

When asked if they would like their local Realtor association to merge with another local association, the biggest share of respondents — more than 4 in 10 — said “yes.”

Just over 3 in 10 do not want their association to merge with another, though some of these respondents said they would prefer their MLS merge with a neighboring MLS.

The rest, 26 percent of respondents, said they didn’t know if they would like their association to merge.



Broker-owners and managing brokers tended to be in the “yes” camp, while agents tended to be in the “no” or “I don’t know” camps.

NAR merger grants

In May, the board of directors of the National Association of Realtors approved an extension of grants to assist local associations who choose to merge in order to be able to offer the services required under NAR’s “core standards.”

The standards were meant to ensure that even the smallest association was capable of offering a minimum set of services, including enforcing the Realtor Code of Ethics, playing a political advocacy role, conducting outreach to consumers, maintaining fiscal responsibility and leveraging technology.

In May, NAR’s board added even more requirements to the core standards.

When NAR’s board first adopted the standards in May 2014, the board allocated up to \$20 million in funding to help associations comply, including through facilitating mergers. NAR expended \$1.4 million of those funds in 2014 and \$5.1 million in 2015.

The board extended the planned June 30, 2016 sunset of merger grants to December 31, 2017. The extension is limited to the first 25 combined associations that merge starting July 1, 2016. The grants will be funded at a rate of \$25 per Realtor member with a range of \$15,000 to \$25,000 per merger. The extension is only for up to \$625,000 in grant funds.

The core standards have been a driving force in association mergers and dissolutions. NAR’s local association count fell from 1,355 in May 2014 to 1,204 as of February 2016 -- an 11 percent decline.

Inman’s survey results indicate that Realtors would like to see even more mergers, citing the possibility of better services and reduced fees, among other reasons.

The ‘yes’ camp

When asked why they’d like their association to merge with another, respondents cited economies of scale;

increased efficiency; access to better leaders, training and tools; fewer disparate rules; fewer “fiefdoms;” fewer duplication of services; and the ability to access more listings in a given market.

Of those who said “yes” to association mergers, 42 percent were broker-owners or managing brokers, 29 percent were broker associates, and 26 percent were agents.

Sample responses:

- “A state, regional or national MLS could provide services at lower costs.”
- “Because we have to enter data multiple times to reach our full market -- redundancy is non-productive.”
- “Benefit to access listings regionally.”
- “So we would have better leadership and access to more tools and training.”
- “Greater reach and opportunities for our members.”
- “Hawaii Island Realtors and West Hawaii Association of Realtors are on the same island/county and duplicate services. They should merge to offer more quality.”
- “Localized limitations are outdated and ineffective.”
- “We need to consider opportunities to grow and increase our regional exposure.”
- “Simplify and lower the fees.”
- “I think there needs to be just a STATE association and a State MLS.”
- “Too many associations in region is inefficient and they spend more time worrying about competing with others instead of improving the business. Larger association able to provide more resources.”
- “Our dues are high and we have always had a local association we could be proud of. I don’t think our local association is relevant any longer, and in fact are holding us back because of their ‘fear’ of loss of control. What control? We lost that years ago.”
- “We crossover so much and we have a common MLS. Maybe dues could get reduced.”
- “Mine recently merged (Oakland and Berkeley). Economies of scale are great. We need more.”
- “Keeps costs down with economy of scale and eliminates turf wars”
- “We get a state license, which for better or worse, enables us to practice real estate in the entire state. It seems like there are way too many power fiefdoms established over the long-term which do more to serve the fiefdoms than to service the members. One state—one lockbox—one power website—one MLS = lower dues, less bureaucracy and more member empowerment.”
- “Just gives better access to each other’s listings. Many Realtors do not subscribe to the bigger MLS and so we don’t see many listings that are in our area.”
- “Would like smaller ones to merge with mine. All same lockboxes and MLS and ability to cover larger area for sales.”
- “I would like to have one Realtor association throughout [New Jersey], as we already have. Each little ‘fiefdom’ sees things slightly differently and charges different fees. If there were just one association with branch offices, not individual associations, our annual cost would be considerably lower.”
- “The larger the community the better chance of finding leads.”
- “I believe the associations should have to compete for our business. There is NO competition in this space and we are forced to pay what they say we owe, with providing very little in return.”
- “It would make a more powerful organization.”
- “Our dues are among the highest in the state and much of that money goes to pay staff, rent, etc. Creating a state association with district offices should be able to accomplish the same services as having redundant local associations.”
- “We have three associations in our county and one is now suing the other two. This is a huge waste of time and money.”

- “Strength in numbers and better cooperation with a shared culture.”
- “Very close in geography, same clientele.”
- “We are the largest in the area (but still only about 1,700 members). We still have a few close with 100 or less members. Seems we’d all be better combined. Shared access to databases, programs, cooperation. Many outsiders come to show our property without access to homes, forms, etc. Just harder to do business.”
- “Economies of scale, savings, consolidated regional political advocacy.”
- “Silly to have so many different associations, though the protectionism is difficult to pierce.”
- “Bad business to have multiple associations providing [the] same services with overlapping and duplicating cost. Crazy!!”
- “There are several other smaller local associations in my marketplace and we have association of choice. This makes it a competitive scenario which sometimes can be good to keep them adding value. However, I feel that these smaller associations are unnecessary and if they merged with the larger one/ones we would likely all benefit from a larger scale with potentially reduced fees. Also, it would eliminate the dark side of competition among them and also the variations in rules. It’s really all too much to try to keep a handle on.”
- “Too many inefficient fiefdoms.”
- “I’d prefer to only belong to one. It causes issues with buyer searches and seller representation if you cannot cover the whole geographic area without belonging to more than one.”
- “I work in areas that have multiple small and MLS associations and they each require membership but they are on different MLS services. They also each require me as a managing broker to pay fees for agents that don’t use their systems. Pretty ridiculous!”

The ‘no’ camp

Just over 3 in 10 respondents were not in favor of their local association merging, however. They cited their “unique” market and the need for expertise in specialty markets; geographic distance from other associations; increased costs; and a loss of attention to local interests with a bigger association. Some said multiple listing services, not associations, should merge.

Of those who said “no” to association mergers, 46 percent were agents, 26 percent were broker associates, and 23 percent were broker-owners or managing brokers.

Sample responses:

- “Distance from other boards.”
- “Our area is very unique and we enjoy our autonomy.”
- “Don’t see the need. Would much prefer the two MLS systems would merge.”
- “The surrounding associations are inferior.”
- “I do not see any benefit to merging. Outside of MLS access, the state association provides more benefits than the local association. I see no advantages to combining [the local] association with the nearest neighboring association. The geographical distance in area would encourage members to sell properties outside of their areas of expertise. With my association having a large area of waterfront luxury homes, second homes, and vacation homes and the neighboring association being a primary residential market it would be feasible to believe new members would be more likely to cross over to the waterfront properties. These waterfront properties have specific set backs and governance that is not found in the traditional market.”
- “Small market. What I’d like to see is all of the local associations across the state unify the forms suite. EVERY local association uses different forms than the next.”
- “Increase in cost.”

- “Then agents out of area sell in one’s specialty market and can’t truly represent a client as his/her buyer’s agent.”
- “Not necessary. Will probably lead to increased expense and frustration. Small groups can move more quickly. Big groups like to throw money at problems.”
- “It’s big enough now: 11,750 members.”
- “We are a pretty isolated market, both physically and economically.”
- “We did and it’s been a nightmare. Merge all MLSs, not boards.”
- “Our association has already swallowed up a number of other associations. In doing so, we lost the attention to local interests specific to each area. Customer service has suffered. We used to walk into the association office and be greeted by name. Now, the association staff does not know the names of broker-owners, let alone the agents. It makes it hard to believe they care about us or our needs.”
- “We are on the state line of Oregon, different laws and culture.”
- “Because we are a small rural area and we would lose our voice in a big association. Our prices and demographics do not conform with the larger big city associations.”
- “I am happy with our association as it is and don’t wish to complicate things adding a lot more members.”
- “We’d become very small fish in a very large pond.”
- “Competing companies would increase with merger but market area would also potentially increase.”
- “Don’t know the benefits or drawbacks. Should I care?”
- “If financial circumstances dictated it would make sense to merge then I would be in favor.”
- “As long as the local associations are able to provide great services to the members, don’t fix it if it is not broken. On the other hand, just like anything else in life or in business, if it is not getting better, than it is getting worse. It cannot be business as usual, because humans will continue to grow and strive to be better everyday.”
- “It depends on why they are merging. Each case is different. I need to see the pros and cons.”
- “Went through a merger in the 90s and it was beneficial. Now the only merger of value to me would be expanding the MLS to state or national.”
- “I don’t know what other associations have to offer or how offerings differ. What is more annoying is that each association has different MLS rules, but we all belong to the same MLS. Therefore when you see an ‘error’ in the MLS and you call MLS they reply with that member belongs to a different association, so they don’t have to do what you do or vice versa.”
- “Who cares? If they are just going to charge me money for the privilege of accessing the MLS then what difference does it make who they are?”
- “There have been discussions about future mergers. I think it’s inevitable.”
- “It has no impact on my business.”
- “Depends on the cost versus benefits.”
- “Just depends on association ability to deliver services.”
- “Depends if it will benefit the members and won’t increase the fees.”
- “What is the benefit to me?”

The “I don’t know” camp

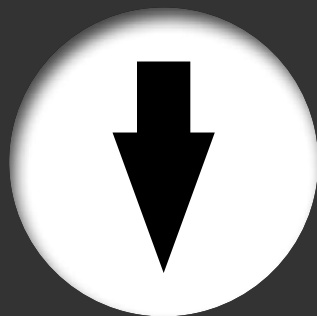
The quarter or so of respondents who didn’t know if they’d like their association to merge tended to be more circumspect.

Of those who said “I don’t know,” 49 percent were agents, 22 percent were broker-owners or managing brokers, and 18 percent were associate brokers.

Sample responses:

- “Not sure if it hurts or helps us.”
- “It doesn’t matter unless the bill goes down.”

Respondent quotes may have been adjusted for clarity and length.

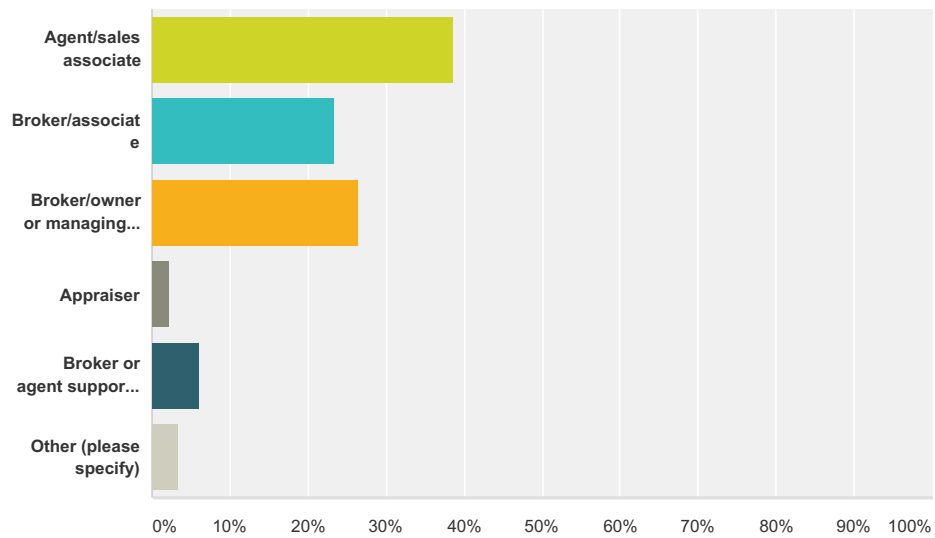


SEE FULL RESULTS

How do you feel about your real estate association services?

Q1 I am an:

Answered: 873 Skipped: 0

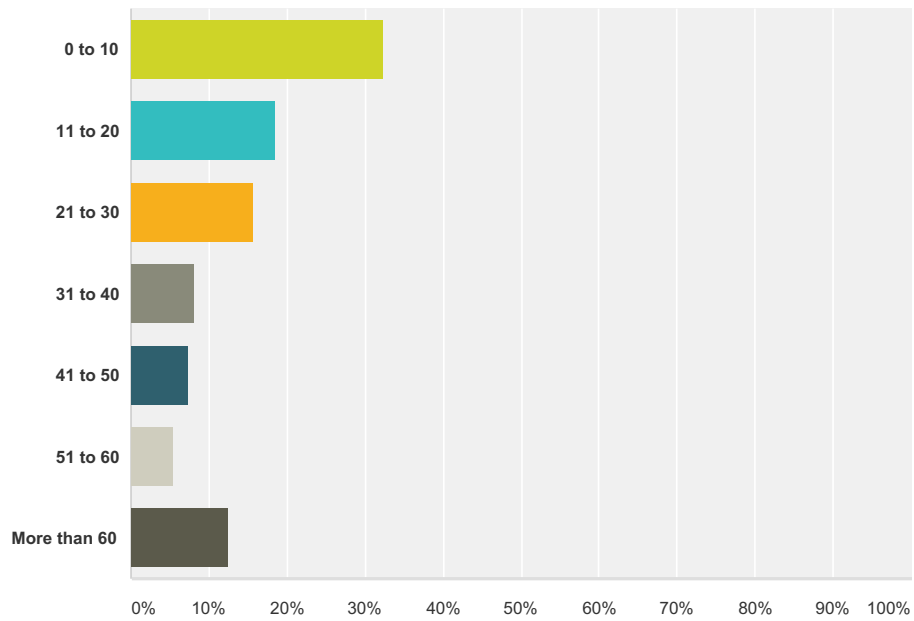


Answer Choices	Responses	
Agent/sales associate	38.60%	337
Broker/associate	23.37%	204
Broker/owner or managing broker	26.46%	231
Appraiser	2.29%	20
Broker or agent support staff	5.96%	52
Other (please specify)	3.32%	29
Total		873

How do you feel about your real estate association services?

Q2 I closed the following number of transactions in 2015:

Answered: 873 Skipped: 0

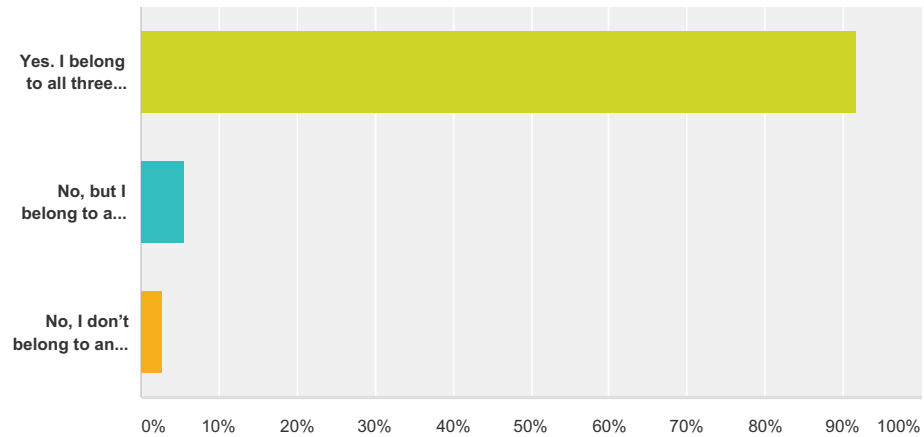


Answer Choices	Responses
0 to 10	32.42% 283
11 to 20	18.67% 163
21 to 30	15.58% 136
31 to 40	8.13% 71
41 to 50	7.33% 64
51 to 60	5.38% 47
More than 60	12.49% 109
Total	873

How do you feel about your real estate association services?

Q3 Do you belong to a local Realtor association?

Answered: 873 Skipped: 0

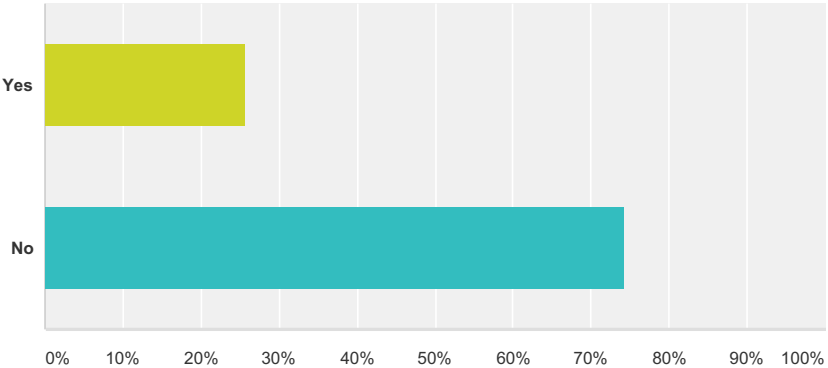


Answer Choices	Responses	
Yes. I belong to all three tiers of Realtor associations: local, state and national.	91.75%	801
No, but I belong to a state Realtor association and the National Association of Realtors.	5.61%	49
No, I don't belong to any Realtor association.	2.63%	23
Total	873	

How do you feel about your real estate association services?

Q4 Do you belong to more than one local Realtor association?

Answered: 405 Skipped: 468



Answer Choices	Responses	
Yes	25.68%	104
No	74.32%	301
Total		405

How do you feel about your real estate association services?

Q5 Please name the local Realtor associations you belong to, starting with your primary association. (Open-ended)

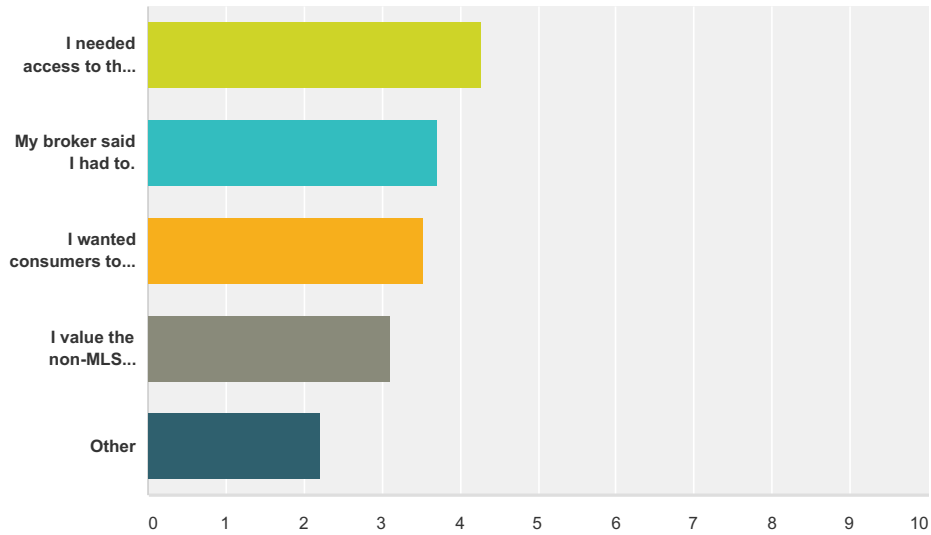
Answered: 405 Skipped: 468

Answer Choices	Responses	
Primary association	100.00%	405
Secondary association	42.47%	172
Tertiary association	28.89%	117

How do you feel about your real estate association services?

Q6 If you do belong to any Realtor associations, what are the reasons you joined? (Please rank in order of importance, with "1" being most important.)

Answered: 405 Skipped: 468



	1	2	3	4	5	N/A	Total	Score
I needed access to the MLS and I can't join the MLS without belonging to the association.	44.94% 182	21.48% 87	9.88% 40	4.44% 18	1.23% 5	18.02% 73	405	4.27
My broker said I had to.	22.72% 92	22.72% 92	13.33% 54	10.37% 42	2.96% 12	27.90% 113	405	3.72
I wanted consumers to know that I adhere to a code of ethics.	16.54% 67	29.38% 119	28.64% 116	13.58% 55	1.23% 5	10.62% 43	405	3.52
I value the non-MLS services the association provides.	11.60% 47	16.79% 68	22.96% 93	25.93% 105	2.47% 10	20.25% 82	405	3.11
Other	2.72% 11	3.21% 13	8.64% 35	12.84% 52	14.57% 59	58.02% 235	405	2.21

How do you feel about your real estate association services?

**Q7 Please name any other reason(s) why
you joined a local/state Realtor
association. (Open-ended)**

Answered: 405 Skipped: 468

Q8 When considering which local Realtor association to join (or state association if you do not belong to a local), please rank the following factors in order of their importance to you, with "1" being most important.

Reason	Count (Approximate)
MLS access.	9.8
Association educational...	7.8
Association office...	7.7
Technology tools/produc...	7.6
Access to specific...	7.3
Association culture.	6.3
Lower dues in comparison t...	6.2
Association legal...	6.1
Free and discounted...	6.0
Personal connection w...	4.9
Other	4.1

	1	2	3	4	5	6	7	8	9	10	11	N/A	Total	Score
MLS access.	50.62% 205	13.83% 56	4.94% 20	4.94% 20	3.21% 13	3.21% 13	0.49% 2	0.99% 4	0.49% 2	1.73% 7	0.49% 2	15.06% 61	405	9.80
Association educational offerings.	6.67% 27	16.05% 65	15.80% 64	11.60% 47	9.14% 37	7.65% 31	5.19% 21	6.42% 26	2.47% 10	0.99% 4	0.00% 0	18.02% 73	405	7.80
Association office location.	17.04% 69	13.33% 54	5.93% 24	5.43% 22	6.91% 28	4.69% 19	5.43% 22	3.46% 14	4.94% 20	3.95% 16	0.99% 4	27.90% 113	405	7.75
Technology tools/products/services offered by the association.	4.94% 20	10.37% 42	16.79% 68	12.84% 52	13.09% 53	5.19% 21	7.41% 30	3.95% 16	1.48% 6	1.73% 7	0.25% 1	21.98% 89	405	7.63
Access to specific transaction forms.	4.20% 17	13.83% 56	11.11% 45	8.64% 35	6.17% 25	5.43% 22	7.41% 30	6.42% 26	3.21% 13	2.96% 12	0.25% 1	30.37% 123	405	7.29
Association culture.	4.20% 17	5.19% 21	6.42% 26	6.91% 28	7.41% 30	11.36% 46	12.10% 49	9.38% 38	7.16% 29	1.98% 8	0.49% 2	27.41% 111	405	6.27

How do you feel about your real estate association services?

Lower dues in comparison to neighboring associations.	2.72% 11	5.68% 23	6.91% 28	5.68% 23	3.70% 15	5.68% 23	7.90% 32	5.68% 23	6.17% 25	5.43% 22	0.49% 2	43.95% 178	405	6.18
Association legal resources.	2.22% 9	5.43% 22	7.16% 29	9.38% 38	7.41% 30	10.37% 42	9.88% 40	8.64% 35	9.63% 39	3.21% 13	0.00% 0	26.67% 108	405	6.16
Free and discounted products offered by the association.	0.49% 2	1.98% 8	5.68% 23	10.62% 43	11.11% 45	16.30% 66	5.93% 24	8.64% 35	5.93% 24	3.70% 15	0.25% 1	29.38% 119	405	6.04
Personal connection with either a staff member or someone already belonging to the association.	1.73% 7	2.72% 11	4.20% 17	4.44% 18	7.65% 31	2.72% 11	4.44% 18	8.40% 34	11.11% 45	14.81% 60	0.74% 3	37.04% 150	405	4.91
Other	2.72% 11	1.73% 7	0.99% 4	2.22% 9	2.22% 9	1.98% 8	1.73% 7	1.48% 6	3.21% 13	7.16% 29	11.85% 48	62.72% 254	405	4.07

How do you feel about your real estate association services?

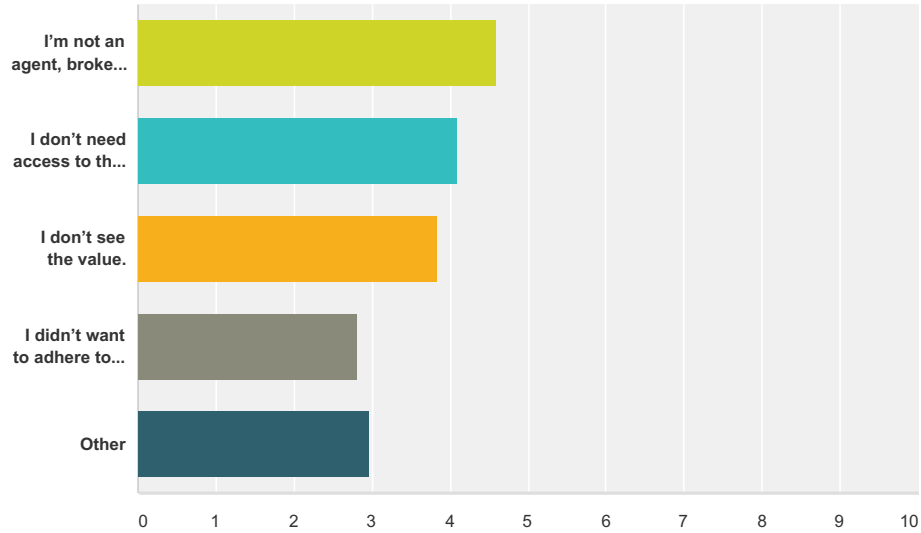
Q9 Please name other factors that were important to you when joining your Realtor association(s). (Open-ended)

Answered: 405 Skipped: 468

How do you feel about your real estate association services?

Q10 If you do not belong to any Realtor associations, what are the reasons why not? (Select in order of importance, with "1" being most important.)

Answered: 362 Skipped: 511



	1	2	3	4	5	Total	Score
I'm not an agent, broker, or appraiser.	75.00% 15	15.00% 3	5.00% 1	5.00% 1	0.00% 0	20	4.60
I don't need access to the MLS or I can join the MLS without being a Realtor.	35.29% 12	41.18% 14	20.59% 7	2.94% 1	0.00% 0	34	4.09
I don't see the value.	34.09% 15	25.00% 11	31.82% 14	9.09% 4	0.00% 0	44	3.84
I didn't want to adhere to the MLS rules about how to operate my business	7.69% 3	20.51% 8	23.08% 9	43.59% 17	5.13% 2	39	2.82
Other	22.22% 8	16.67% 6	16.67% 6	25.00% 9	19.44% 7	36	2.97

How do you feel about your real estate association services?

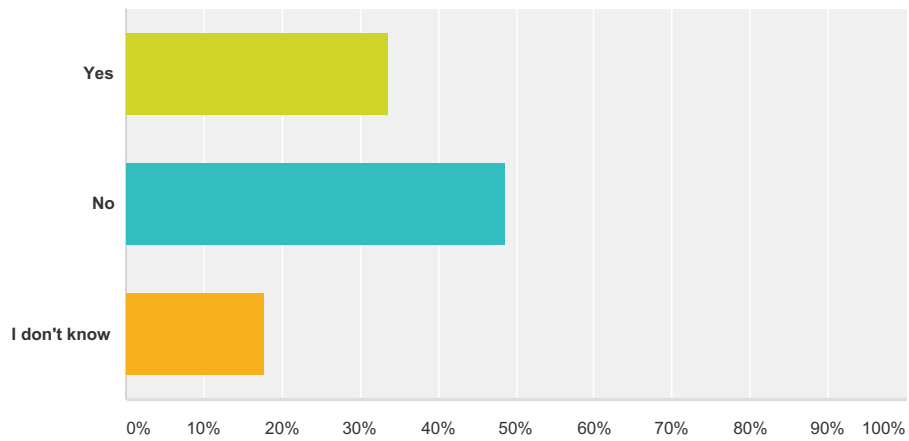
**Q11 Please name any other reason(s) why
you did not join a Realtor association.
(Open-ended)**

Answered: 362 Skipped: 511

How do you feel about your real estate association services?

Q12 Can you join your local MLS without belonging to a Realtor association?

Answered: 356 Skipped: 517

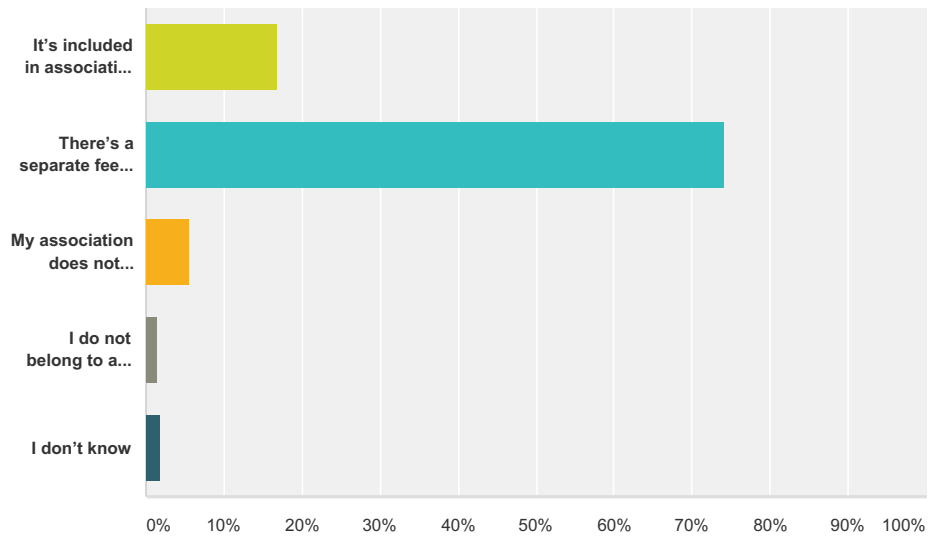


Answer Choices	Responses	
Yes	33.71%	120
No	48.60%	173
I don't know	17.70%	63
Total		356

How do you feel about your real estate association services?

Q13 Is access to the MLS included in your association dues, or do you pay a separate fee for that?

Answered: 356 Skipped: 517

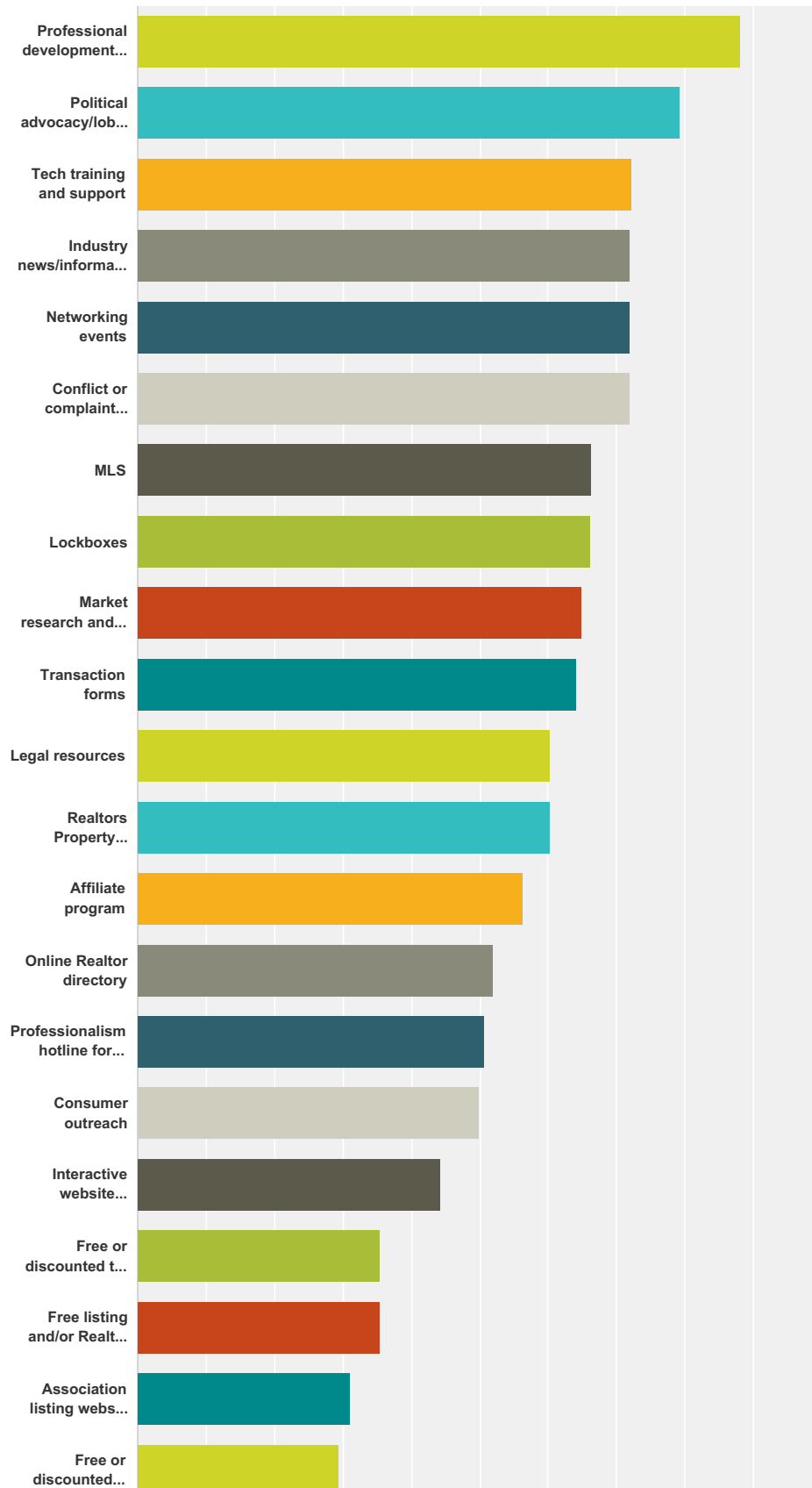


Answer Choices	Responses	
It's included in association dues.	16.85%	60
There's a separate fee for the MLS.	74.16%	264
My association does not provide MLS access.	5.62%	20
I do not belong to a Realtor association/I do not need access to the MLS.	1.40%	5
I don't know	1.97%	7
Total		356

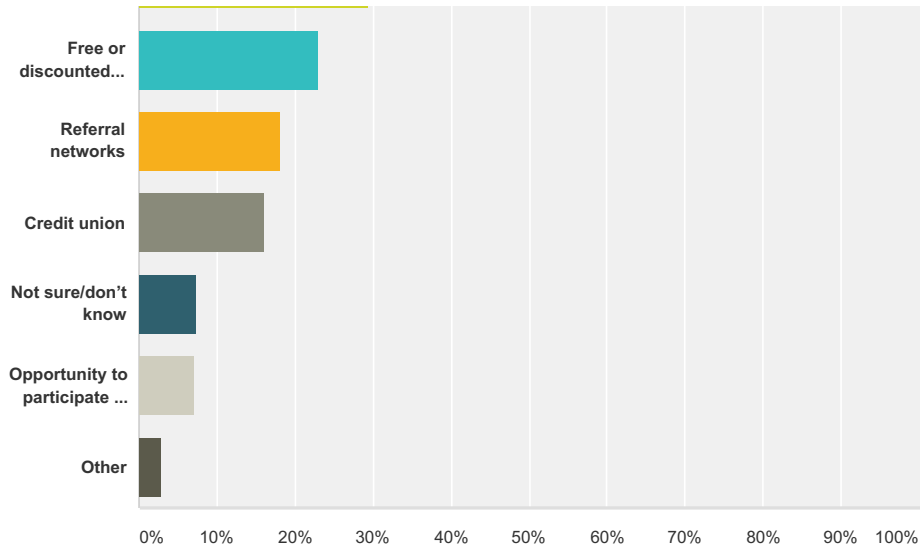
How do you feel about your real estate association services?

Q14 Which services do(es) your Realtor association(s) offer? (check all that apply)

Answered: 343 Skipped: 530



How do you feel about your real estate association services?



Answer Choices	Responses	
Professional development (i.e. continuing education/designation/certification courses, conferences)	88.05%	302
Political advocacy/lobbying	79.30%	272
Tech training and support	72.30%	248
Industry news/information	72.01%	247
Networking events	72.01%	247
Conflict or complaint resolution/arbitration/mediation	72.01%	247
MLS	66.47%	228
Lockboxes	66.18%	227
Market research and statistics	65.01%	223
Transaction forms	64.14%	220
Legal resources	60.35%	207
Realtors Property Resource (RPR) national property database	60.35%	207
Affiliate program	56.27%	193
Online Realtor directory	51.90%	178
Professionalism hotline for ethics, transactional or professional standards questions	50.73%	174
Consumer outreach	49.85%	171
Interactive website detailing the association's programs and resources	44.31%	152
Free or discounted tech products	35.57%	122
Free listing and/or Realtor profile on realtor.com	35.57%	122
Association listing website for consumers	31.20%	107
Free or discounted insurance benefits	29.45%	101
Free or discounted transaction management platform	23.03%	79
Referral networks	18.08%	62
Credit union	16.03%	55
Not sure/don't know	7.29%	25

How do you feel about your real estate association services?

Opportunity to participate in REach incubator program	7.00%	24
Other	2.92%	10
Total Respondents: 343		

How do you feel about your real estate association services?

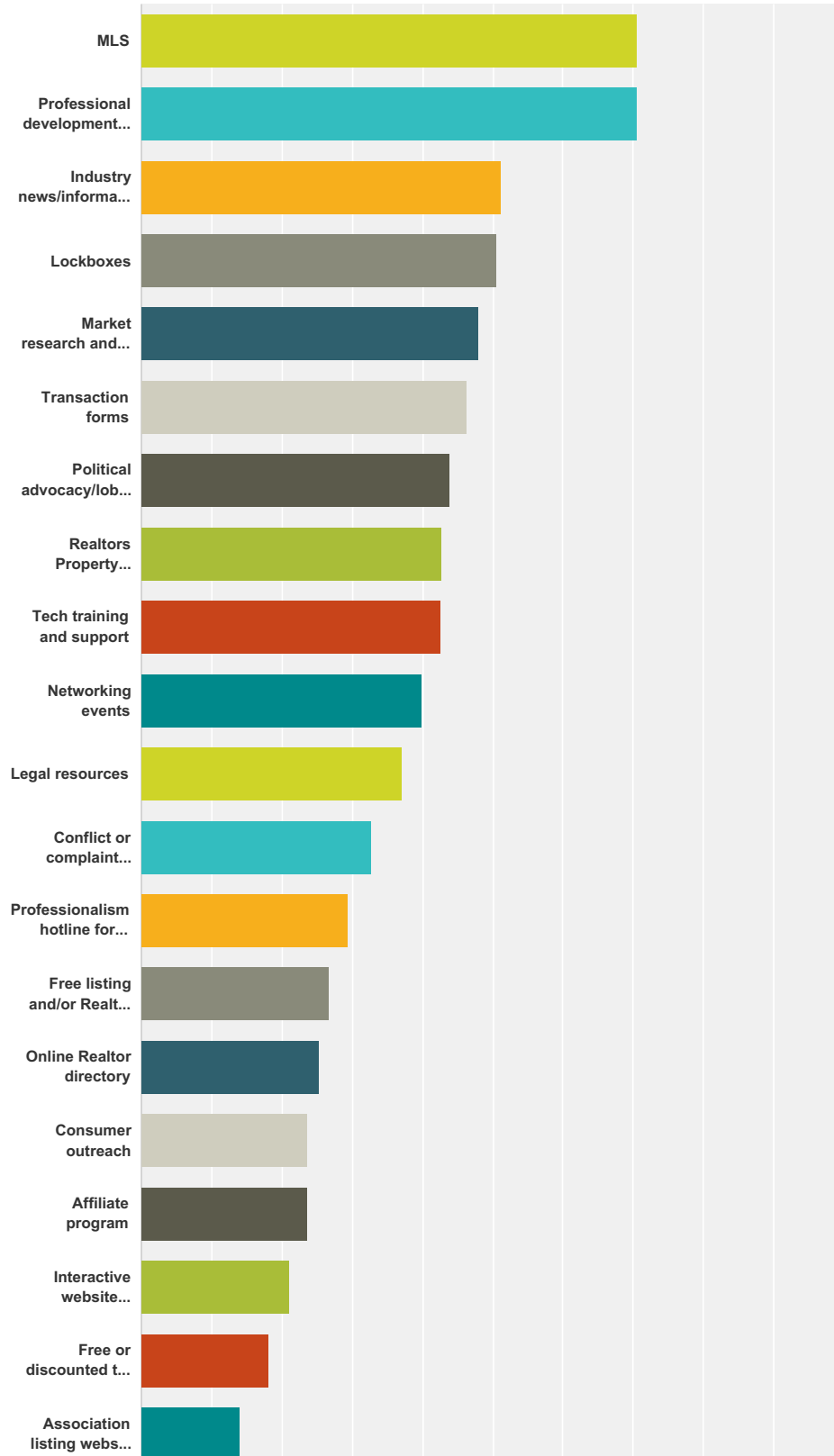
**Q15 Please name the other
service(s) your Realtor association(s)
offer. (Open-ended)**

Answered: 1 Skipped: 872

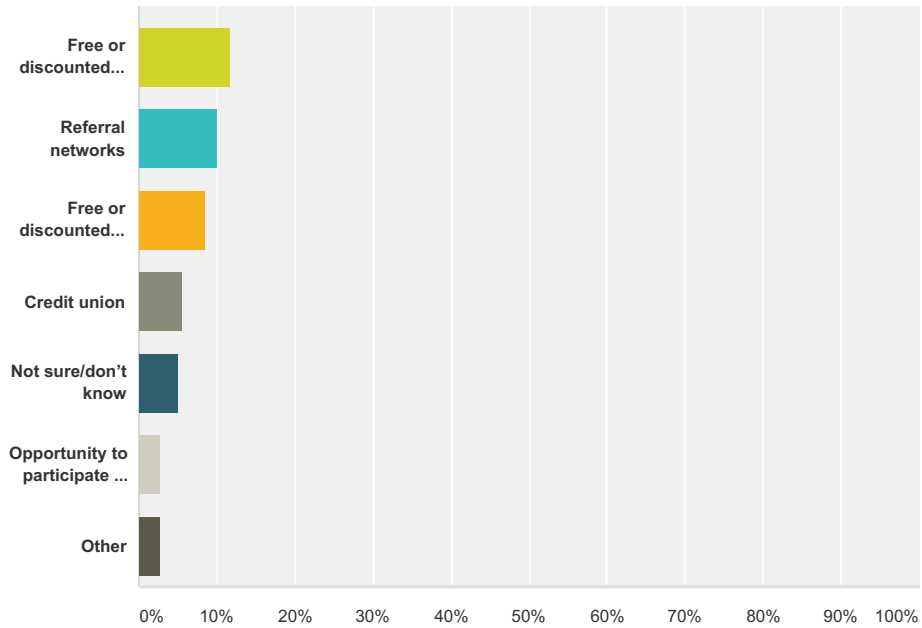
How do you feel about your real estate association services?

Q16 Of the services your Realtor association(s) offers, which do you use/benefit from? (Please check all that apply)

Answered: 336 Skipped: 537



How do you feel about your real estate association services?



Answer Choices	Responses	
MLS	70.54%	237
Professional development (i.e. continuing education/designation/certification courses, conferences)	70.54%	237
Industry news/information	51.19%	172
Lockboxes	50.60%	170
Market research and statistics	47.92%	161
Transaction forms	46.43%	156
Political advocacy/lobbying	43.75%	147
Realtors Property Resource (RPR) national property database	42.86%	144
Tech training and support	42.56%	143
Networking events	39.88%	134
Legal resources	37.20%	125
Conflict or complaint resolution/arbitration/mediation	32.74%	110
Professionalism hotline for ethics, transactional or professional standards questions	29.46%	99
Free listing and/or Realtor profile on realtor.com	26.79%	90
Online Realtor directory	25.30%	85
Consumer outreach	23.51%	79
Affiliate program	23.51%	79
Interactive website detailing the association's programs and resources	21.13%	71
Free or discounted tech products	18.15%	61
Association listing website for consumers	13.99%	47
Free or discounted transaction management platform	11.61%	39
Referral networks	10.12%	34
Free or discounted insurance benefits	8.63%	29

How do you feel about your real estate association services?

Credit union	5.65%	19
Not sure/don't know	5.06%	17
Opportunity to participate in REach incubator program	2.68%	9
Other	2.68%	9
Total Respondents: 336		

How do you feel about your real estate association services?

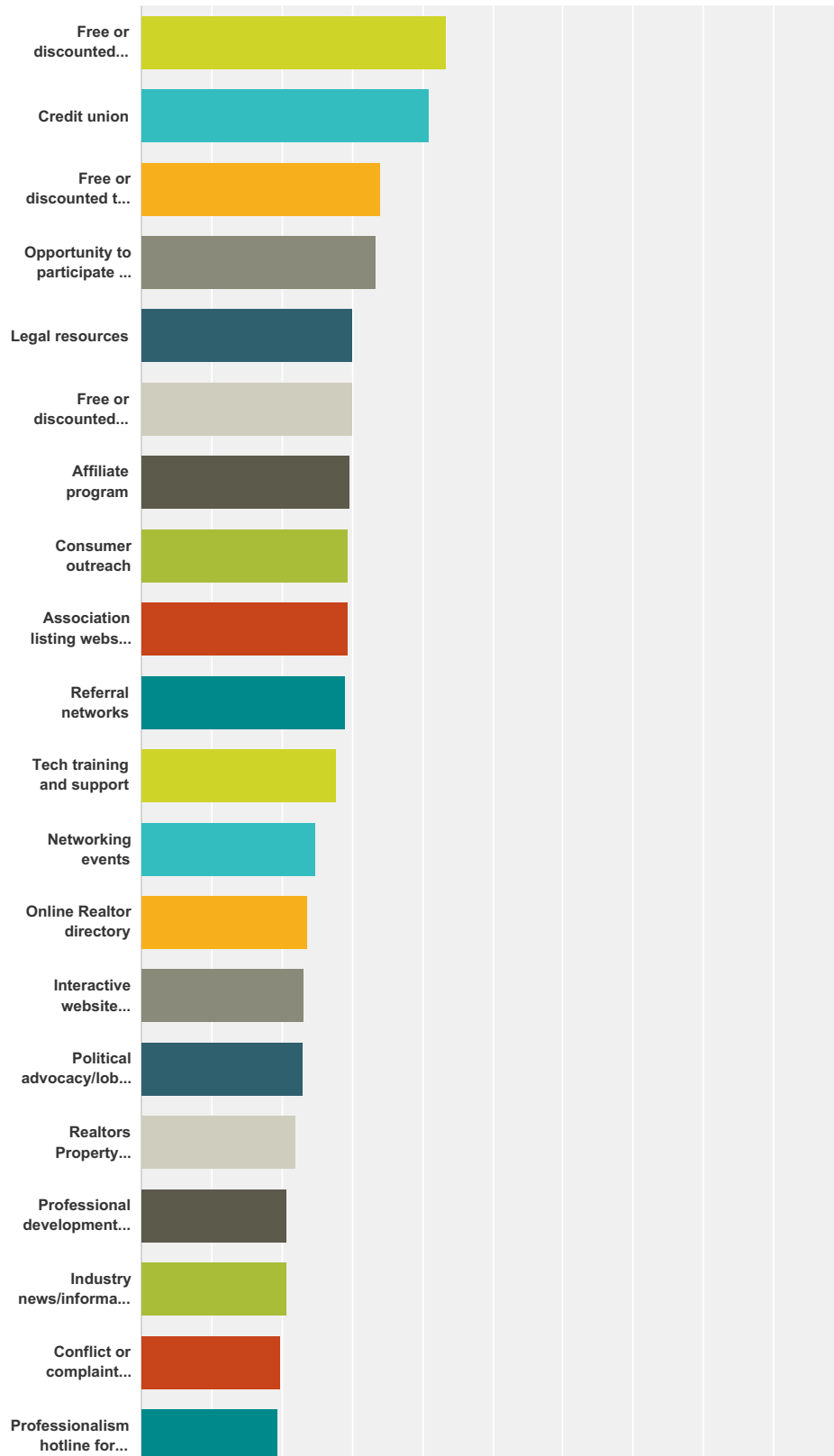
**Q17 Please name the other service(s) your
Realtor association(s) offers that you
benefit from. (Open-ended)**

Answered: 5 Skipped: 868

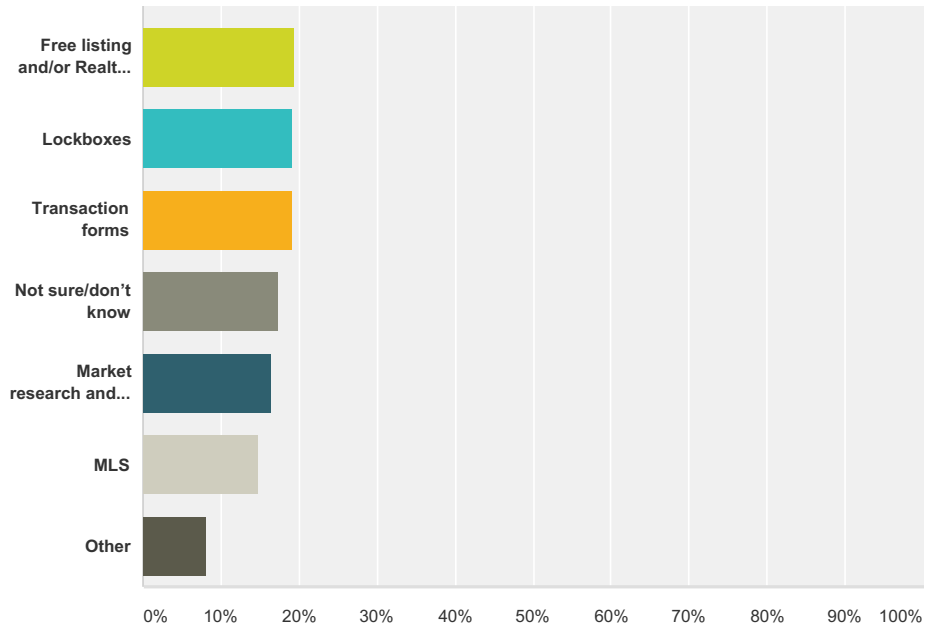
How do you feel about your real estate association services?

Q18 Of the services your Realtor association(s) offers, which do you not use/benefit from? (Please check all that apply)

Answered: 323 Skipped: 550



How do you feel about your real estate association services?



Answer Choices	Responses	
Free or discounted insurance benefits	43.34%	140
Credit union	40.87%	132
Free or discounted tech products	34.06%	110
Opportunity to participate in REach incubator program	33.44%	108
Legal resources	30.03%	97
Free or discounted transaction management platform	30.03%	97
Affiliate program	29.72%	96
Consumer outreach	29.41%	95
Association listing website for consumers	29.41%	95
Referral networks	29.10%	94
Tech training and support	27.86%	90
Networking events	24.77%	80
Online Realtor directory	23.53%	76
Interactive website detailing the association's programs and resources	23.22%	75
Political advocacy/lobbying	22.91%	74
Realtors Property Resource (RPR) national property database	21.98%	71
Professional development (i.e. continuing education/designation/certification courses, conferences)	20.74%	67
Industry news/information	20.74%	67
Conflict or complaint resolution/arbitration/mediation	19.81%	64
Professionalism hotline for ethics, transactional or professional standards questions	19.50%	63
Free listing and/or Realtor profile on realtor.com	19.50%	63
Lockboxes	19.20%	62
Transaction forms	19.20%	62

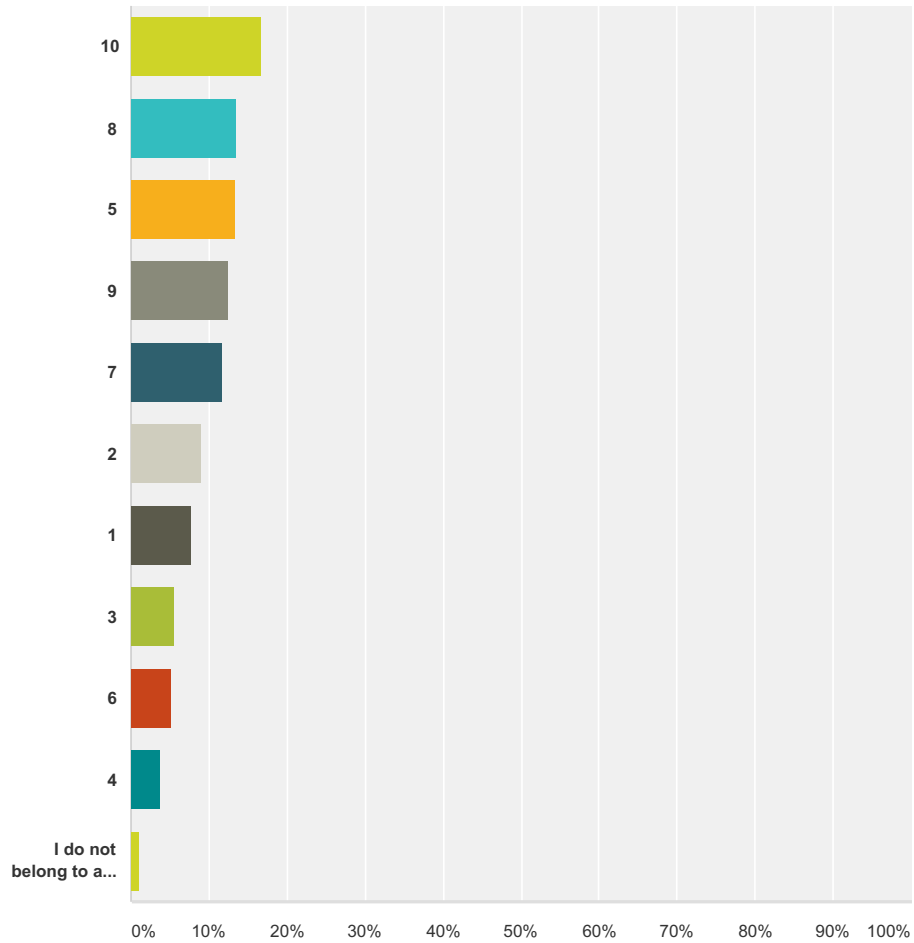
How do you feel about your real estate association services?

Not sure/don't know	17.34%	56
Market research and statistics	16.41%	53
MLS	14.86%	48
Other	8.05%	26
Total Respondents: 323		

How do you feel about your real estate association services?

Q19 On a scale of 1 to 10, with 1 being "very dissatisfied" and 10 being "very satisfied," please rank how you feel about the services provided to you by your Realtor associations.

Answered: 301 Skipped: 572



Answer Choices	Responses	
10	16.61%	50
8	13.62%	41
5	13.29%	40
9	12.62%	38
7	11.63%	35
2	8.97%	27
1	7.64%	23
3	5.65%	17
6	5.32%	16
4	3.65%	11

How do you feel about your real estate association services?

I do not belong to a Realtor association	1.00%	3
Total		301

How do you feel about your real estate association services?

**Q20 How could your local Realtor association improve its services?
(Open-ended)**

Answered: 301 Skipped: 572

How do you feel about your real estate association services?

**Q21 How could your state Realtor association improve its services?
(Open-ended)**

Answered: 301 Skipped: 572

How do you feel about your real estate association services?

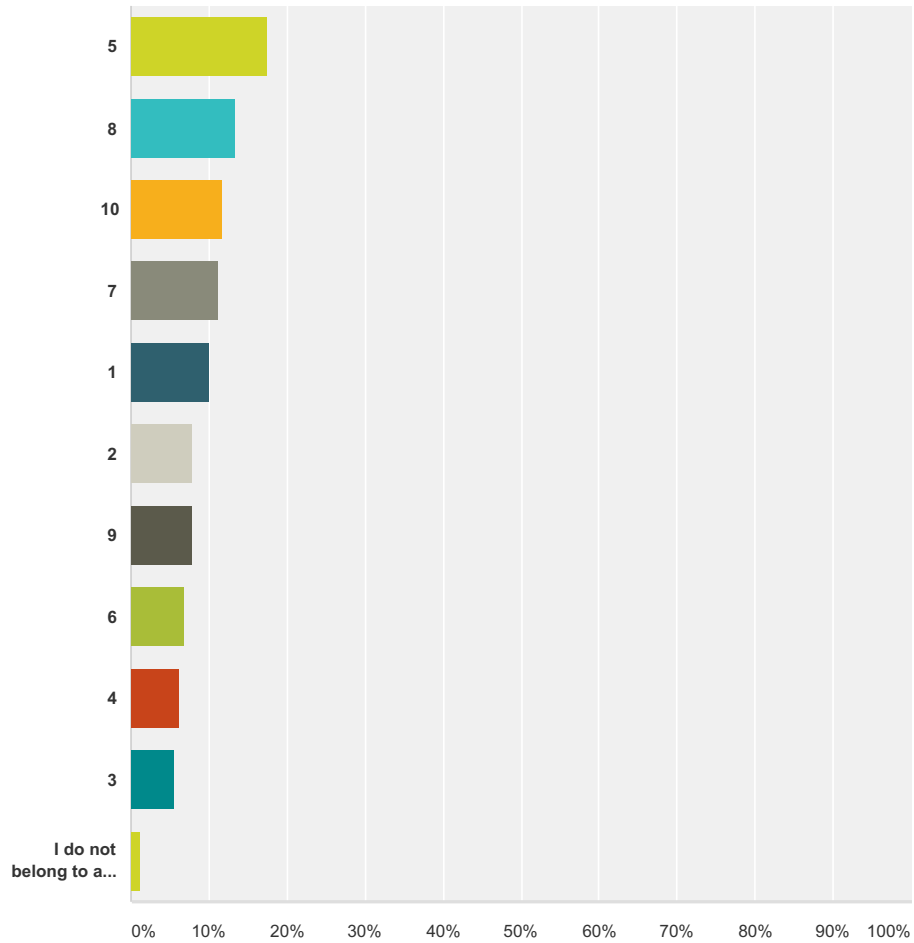
**Q22 How could your national Realtor
association improve its services?
(Open-ended)**

Answered: 301 Skipped: 572

How do you feel about your real estate association services?

Q23 On a scale of 1 to 10, with 1 being "very dissatisfied" and 10 being "very satisfied," please rank how you feel about the technology tools and products provided to you by your Realtor association(s).

Answered: 301 Skipped: 572



Answer Choices	Responses	
5	17.61%	53
8	13.29%	40
10	11.63%	35
7	11.30%	34
1	9.97%	30
2	7.97%	24
9	7.97%	24
6	6.98%	21
4	6.31%	19
3	5.65%	17

How do you feel about your real estate association services?

I do not belong to a Realtor association	1.33%	4
Total		301

How do you feel about your real estate association services?

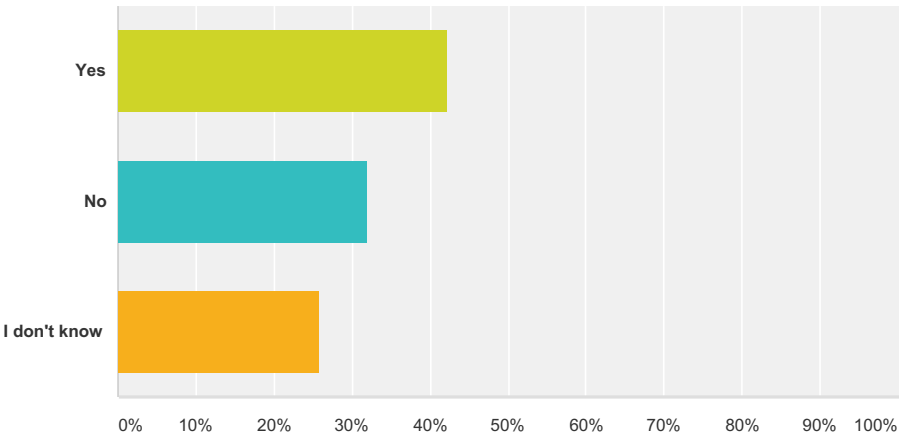
**Q24 How could your Realtor associations
improve their tech offerings? (Open-
ended)**

Answered: 301 Skipped: 572

How do you feel about your real estate association services?

Q25 Some local Realtor associations have been merging. Is this something you wish your local association would do?

Answered: 297 Skipped: 576



Answer Choices	Responses	
Yes	42.09%	125
No	31.99%	95
I don't know	25.93%	77
Total		297

How do you feel about your real estate association services?

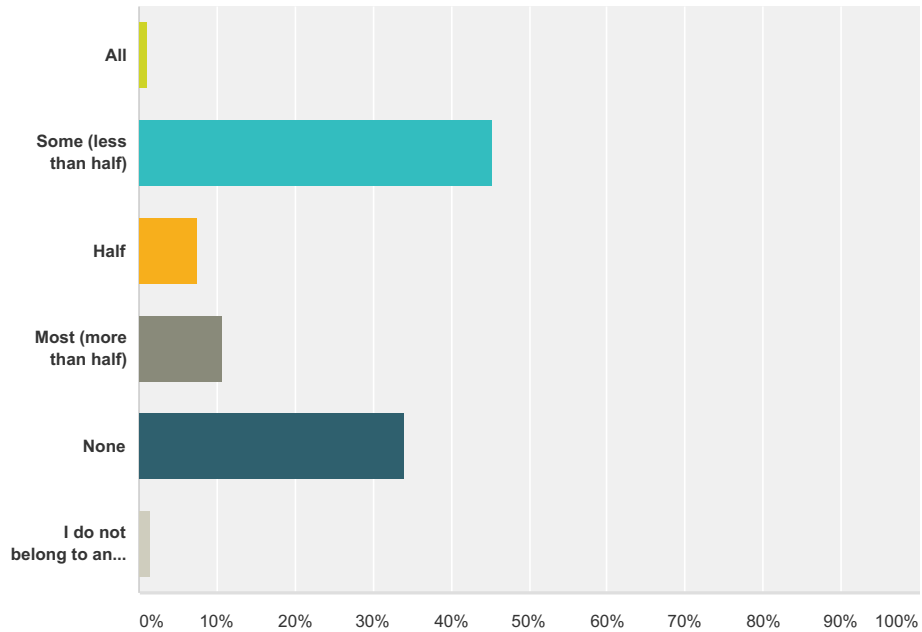
**Q26 Why or why
not? (Open-ended)**

Answered: 297 Skipped: 576

How do you feel about your real estate association services?

Q27 When considering the mix of technology tools that you use to manage your business, what share do your Realtor associations provide/pay for?

Answered: 282 Skipped: 591

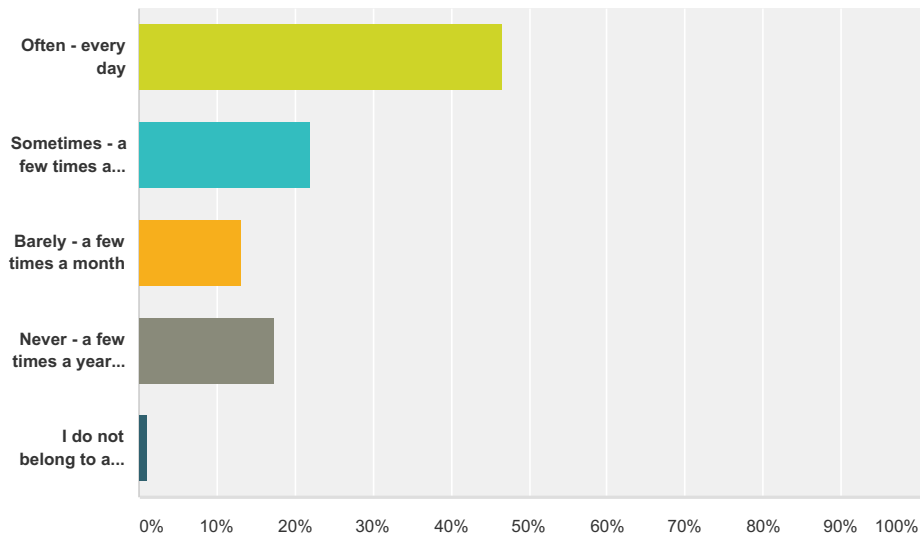


Answer Choices	Responses	
All	1.06%	3
Some (less than half)	45.39%	128
Half	7.45%	21
Most (more than half)	10.64%	30
None	34.04%	96
I do not belong to an association/this question does not apply to me	1.42%	4
Total		282

How do you feel about your real estate association services?

**Q28 I use the services provided by my
Realtor association(s):**

Answered: 282 Skipped: 591

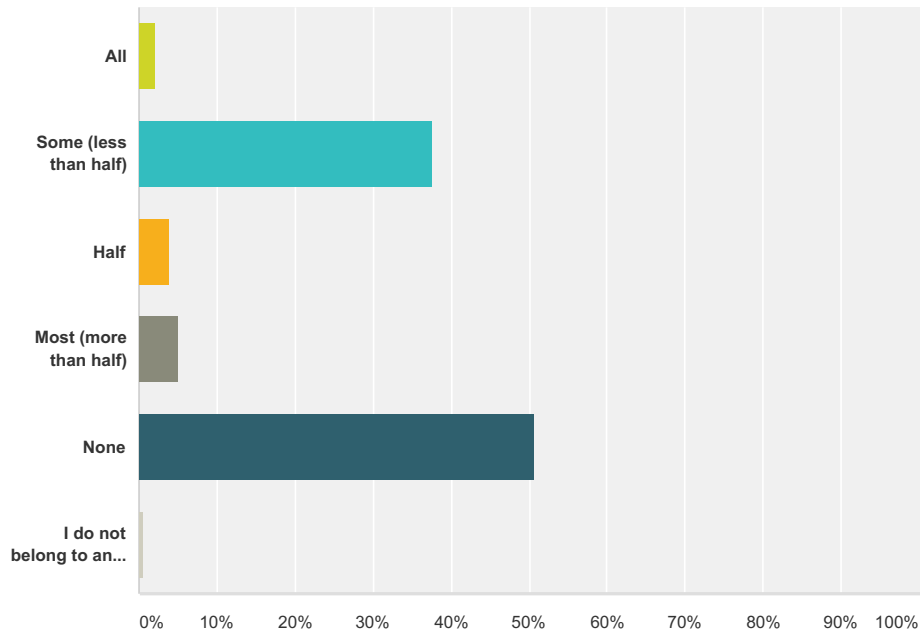


Answer Choices	Responses	
Often - every day	46.45%	131
Sometimes - a few times a week	21.99%	62
Barely - a few times a month	13.12%	37
Never - a few times a year or not at all	17.38%	49
I do not belong to a Realtor association.	1.06%	3
Total		282

How do you feel about your real estate association services?

Q29 When considering the mix of technology tools that you use to manage your business, what share do you purchase at a discount or reduced price point that was provided/arranged by your Realtor association(s)?

Answered: 282 Skipped: 591

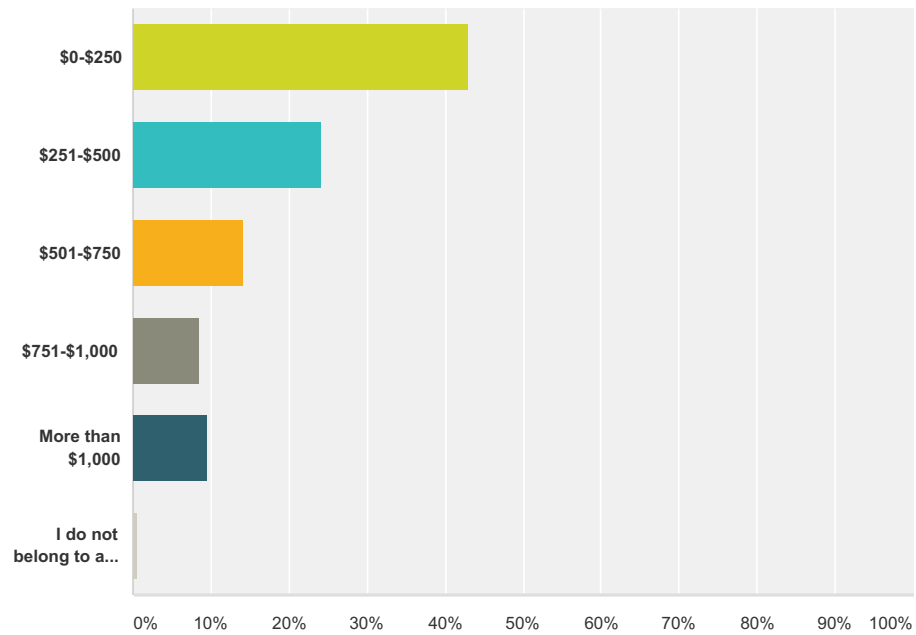


Answer Choices	Responses	
All	2.13%	6
Some (less than half)	37.59%	106
Half	3.90%	11
Most (more than half)	4.96%	14
None	50.71%	143
I do not belong to an association/this question does not apply to me	0.71%	2
Total		282

How do you feel about your real estate association services?

Q30 How much do you think your Realtor associations' services are worth per year?

Answered: 282 Skipped: 591

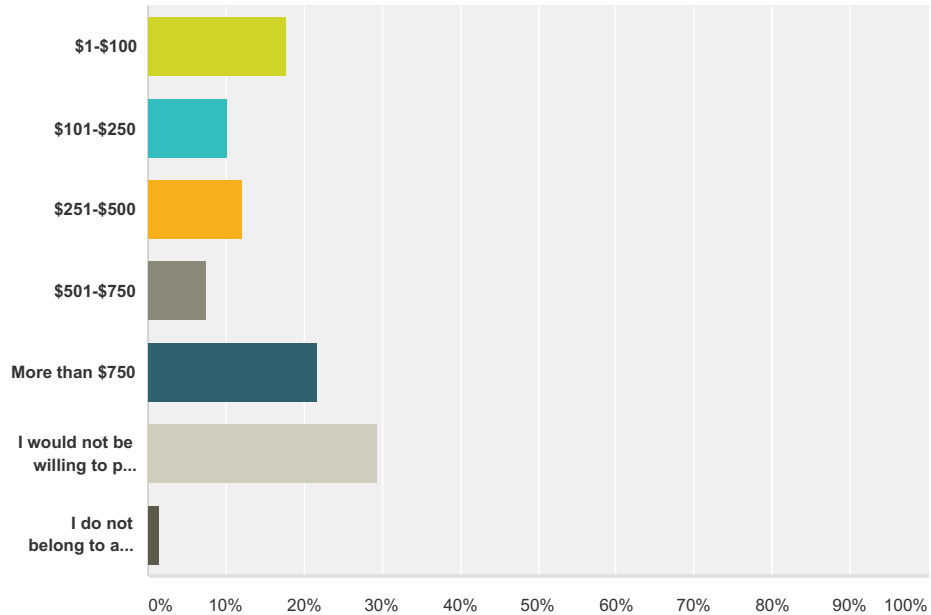


Answer Choices	Responses	
\$0-\$250	42.91%	121
\$251-\$500	24.11%	68
\$501-\$750	14.18%	40
\$751-\$1,000	8.51%	24
More than \$1,000	9.57%	27
I do not belong to a Realtor association	0.71%	2
Total		282

How do you feel about your real estate association services?

Q31 How much more in association dues would you be willing to pay if the National Association of Realtors raised the requirements for becoming a Realtor and there were fewer members?

Answered: 282 Skipped: 591



Answer Choices	Responses	
\$1-\$100	17.73%	50
\$101-\$250	10.28%	29
\$251-\$500	12.06%	34
\$501-\$750	7.45%	21
More than \$750	21.63%	61
I would not be willing to pay more	29.43%	83
I do not belong to a Realtor association	1.42%	4
Total		282

How do you feel about your real estate association services?

Q32 Thank you for your time. If you would like to be entered into the drawing to receive an Apple Watch, please leave your name and contact information below.

Answered: 210 Skipped: 663