

COMPARING SOFTWARE SURVEYS

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The *CPA Journal's* survey focuses on tax practitioners' satisfaction with commercially available tax preparation and tax research software. Each October, the *Journal of Accountancy (JofA)* publishes an annual tax software survey that also measures user satisfaction.

The two surveys differ in several important respects. First, the *JofA* survey is better characterized as a software review that includes user-satisfaction ratings. The *JofA* survey reports overall product ratings, support ratings, network ratings, and conversion package ratings. These are accompanied by relatively detailed product descriptions, which identify the states covered by and individual features of each software package reviewed. The *CPAJ* survey asks for an overall rating of each product, but also measures user satisfaction on several dimensions, including cost, ease of use, customer support, available features, timely updates, availability of states, and company reliability. It also asks respondents to rate their own level of familiarity with the product, because ratings may change as users become more familiar with a product.

In addition, the population sampled for the *JofA* survey is much larger, as the practitioners are members of the National Association of Tax Professionals across the entire United States. As described above, the population sampled for the *CPAJ* survey is limited to New York State practitioners. The sample size of approximately 1,000 respondents to the *JofA* survey is also larger than that of the *CPAJ* survey, which generated 235 responses.

Finally, the *JofA* survey is limited to individual tax preparation software, while the *CPAJ* survey includes user satisfaction with tax research software each year, and this year added entity tax preparation software. The *CPAJ* survey also asks respondents about their use of other technology solutions to manage their tax practices. Thus, while the information presented in the two surveys overlaps to some extent, the two studies are best viewed as complementary. □