



2019 Builder Impressions Survey

Executive Summary and Detailed Findings

Prepared for: Tarion Warranty Corporation

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Table of Contents

Introduction.....4
 Why the Need for Research?.....4
 Research Approach.....4
Executive Summary.....5
 Builders’ Optimism.....5
 Builder Outreach Opportunities.....7
Detailed Findings8
Industry Outlook.....9
 New Residential Building Activity – Market Outlook9
 New Residential Building Activity – Company Outlook.....10
Top Issues Facing Ontario Builders.....11
 Core Challenges11
 Outlook for Overall Quality of Skilled Labour.....12
Builders’ Impression of Tarion.....13
 Overall Impression of Tarion – Based on Personal Experience13
 Overall Impression of Tarion – Based on External Media Coverage.....14
 Commitment to Customer Service.....15
 Strength of the Builder Relationship with Tarion.....16
 Tarion Advocacy.....17
 Overall Performance Perceptions18
 Specific Impressions of Tarion19
 Tarion Image Attributes20
Builder Licensing and Home Enrolment.....21
 Builder Licensing Process.....21
 Home Enrolment Process23
Concerns and Builder-Driven Suggestions for Improvement.....25
 Builders’ Major Concerns / Issues with Tarion.....25
 Suggested Improvements to Assist Builders.....26
Industry Considerations and Website Feedback.....27
 Industry Considerations due to Condo Project Cancellations27
 Tarion.com Website Feedback and Comments.....28
APPENDIX – 2019 Builder Impressions Survey.....29

Introduction

This report highlights the results from a recently completed telephone survey of key personnel at a random selection of registered builders in Ontario (“builders”). The report is designed to help Tarion understand the challenges and opportunities to strengthen relationships with Ontario builders.

Why the Need for Research?

The primary goal of this research is to understand builders’ perceptions of Tarion’s recent performance, customer service, and image, among various other factors. Surveying builders also offers Tarion direct perspective on the major trends and issues facing their organizations and their local markets.

Tarion will use the insights gained from this research to gauge perceptions of its corporate performance. In addition, the results will provide current data that can be used in decision-making about future builder communication and service improvement strategies.

Research Approach

Forum Research used an existing questionnaire provided by Tarion.

In 2019, Forum Research invited 1,570 home builders to complete the survey. 206 interviews were completed with key personnel at randomly selected registered new home builders in Ontario. All surveys were completed between October 21st, 2019 and January 14th, 2020. The average survey length was about 22 minutes in length and the response rate was 13%. The report presents the survey findings in aggregate only, respecting all assurances of confidentiality and anonymity promised to individual interviewees.

This report begins with an Executive Summary outlining the key findings as well as the conclusions from the research, followed by a detailed analysis of the results.

Executive Summary

This report highlights the results from Tarion's 2019 Builder Impressions Survey of 206 telephone interviews with key personnel at registered builders in Ontario.

The survey objectives were to:

- Understand builders' overall market outlook for new residential construction and the top challenges they are facing (to provide context and identify the potential influence of external market perspectives on their impressions of Tarion)
- Determine builders' overall impressions of Tarion, performance perceptions, and the strength of the relationship builders feel they have with Tarion
- Reveal builders' specific impressions of Tarion across a range of corporate performance attributes and traits
- Explore what issues, if any, builders have with recent changes Tarion has made
- Capture builders' suggestions for improvements
- Determine the key drivers of builders' impressions of Tarion to help identify the priority areas for future relationship management initiatives
- Measure satisfaction with Tarion's builder registration and new home enrolment processes

Key findings and perspectives are presented in this Executive Summary.

Builders' Optimism

A majority of builders feel the residential construction market and their own companies' prospects will remain stable or improve over the next 12 months.

- The majority of builders (92%) expect that the market for new residential construction activities will increase or stay the same over the next 12 months
- 85% of builders expect new residential construction activities will increase or stay the same over the next 12 months

Consensus on Major Issues and Challenges

In 2019, the biggest challenge forecasted by builders was...

1. Availability of skilled labour/tradespeople (31%, up 8% from 23% in 2018)

followed by,

2. Finding land to build on/acquisition/development (14%)
3. Economy/recession/consumer confidence/market conditions (13%)
4. Government regulation/permit/fees/demands (10%)

The economy/recession/consumer confidence/market conditions were the biggest challenge forecasted by builders last year (26% in 2018 compared to 13% in 2019), and availability of skilled labour/tradespeople was less of a concern to builders (23% in 2018 compared to 31% in 2019). However, in the four years prior to 2018, availability of skilled labour/tradespeople was the top challenge according to builders.

Builders' Overall Impressions of Tarion

In 2019, overall impressions of Tarion vary from 2018. Overall impressions of Tarion were measured looking at personal experience and what builders have read, seen, or heard separately. Historically, this was one measure. At a high level, impressions of Tarion were higher when based on personal experience when compared to impressions of Tarion based on what builders have read, seen or heard. For both impressions based on personal experience and impressions based on external coverage, the larger builder groups were more likely to have favourable impressions of Tarion.

- Overall, 70% of builders have a favourable impression of Tarion, when based solely on personal experience. Micro + Small builders had the least favourable impression when compared to the larger builder groups (67%, compared to 71% for Medium, 88% for Large, and 85% for High-Rise).
- When based on external media coverage, builders had a significantly less favourable impression of Tarion when based solely on what they've read, seen, or heard. 40% of builders had a "Very" or "Somewhat" favourable impression of Tarion. Medium builders had the least favourable impression when compared to the Smaller builder groups (33%, compared to 41% for Micro + Small, 38% for Large, 58% for High-Rise).
- Satisfaction with Tarion's overall performance has dropped by 8% from 50% in 2018 to 42% (T2B, extremely/very satisfied). Ratings for Micro + Small builders and Large builders dropped by 12% to 13% from 2018 while ratings for Medium and High-Rise builders increased by 6%.
- Less than half of builders overall (46%) are satisfied with Tarion's builder licensing process, which is a 7% decrease from 2018. Satisfaction has declined amongst Small-volume (down 11%) and Large-volume (down 15%) builders. In contrast, satisfaction has increased amongst Medium-volume (up 9%) and High-Rise volume (up 15%) builders. High-Rise builders are the most satisfied (86%). Large and High-Rise volume builders did not show any dissatisfaction with the licensing process (Extremely/Very/Somewhat satisfied: 100%).
- 62% of builders are willing to advocate for Tarion. Small-volume (56%) and Medium-volume (67%) builders are the least willing to say positive things about Tarion, while willingness among Large-volume (75%) builders and High-Rise (83%) builders is higher.
- Builders' views of their relationship with Tarion have decreased from the previous year by 10% from 69% to 59%. Micro + Small builders rate their overall relationship with Tarion the lowest amongst all builders at 54% Excellent/Very good, followed by 60% of Medium builder's and 81%

of Large builders. High-Rise builders rate their overall relationship with Tarion the highest at 75%.

- A third (32%) of builders say Tarion’s commitment to customer service has improved, which is a 10% decrease from 2018. Over half (54%) say Tarion’s commitment to customer service has remained the same.
- The three traits that builders most strongly associate with Tarion are Tarion encourages builders to provide good customer service (94%), is courteous (92%), and educates builders about warranty/construction matters (86%).

Builder Outreach Opportunities

The research indicates the following opportunities for Tarion to further foster relationships with builders throughout 2020.

- **Improve the overall process of payments, renewals, guidelines, and forms** – When builder suggestions were solicited, this was cited as the top improvement that Tarion could make. Areas to focus on that can improve this area include simplifying these processes, making them more efficient, having better timelines, and ensuring fairness. Satisfaction with these areas of the licensing process have declined from 2018. Satisfaction with the timeliness of licensing decisions dropped 4% from 2018 to 48% (Extremely/Very satisfied) in 2019. Furthermore, satisfaction with the fairness of rules/requirements dropped 7% from 2018 (45% Extremely/Very satisfied).
- **Work towards a more balanced, consistent, and fair warranty process** – When builder suggestions were solicited, this was cited as the top main improvement that Tarion could make. Areas to focus on that would improve this area would be to address areas of major concern to builders such as the changing warranty standards that are getting harder for the builder (7%) and the conciliation/warranty process is difficult for builders (7%).
- **Strengthen its communication skills** – When builder suggestions were solicited, two of the four top improvements that Tarion could make to assist them were focused solely on communication. This area could be improved by Tarion by being available, responding faster, and providing more up-to-date information. Furthermore, ensure that Tarion’s toll-free line personnel, Tarion’s Warranty Services Department, and call centre personnel are equipped to do this – these services are used by many builders (71%, 66%, 62% respectively).
- **Work towards being transparent and straightforward to deal with** – These two interrelated attributes receive the lowest rankings amongst traits associated with Tarion (72%, 70%).
- **Advocate for builders on their key challenges** – Especially on their primary issue of the availability/quality of skilled labour/tradespeople (31%), followed by finding land to build on/acquisition/development (14%).

This Executive Summary represents the key findings. A detailed report is presented on the following pages.

Detailed Findings

This report is divided into five broad sections. The first and second sections explore builders' outlook for the new residential construction market and synthesizes their perspectives on key challenges and emerging issues.

The third section examines builders' impressions of Tarion, including overall performance and impression measures. The fourth presents the evaluation of Tarion's builder Licensing and Home Enrolment processes, and the fifth includes builders' suggestions for improvements Tarion could consider.

Each section in this report provides a thorough overview of the key survey findings. Where available, respondents' verbatim comments are incorporated to illustrate observations and interpretations.

Industry Outlook

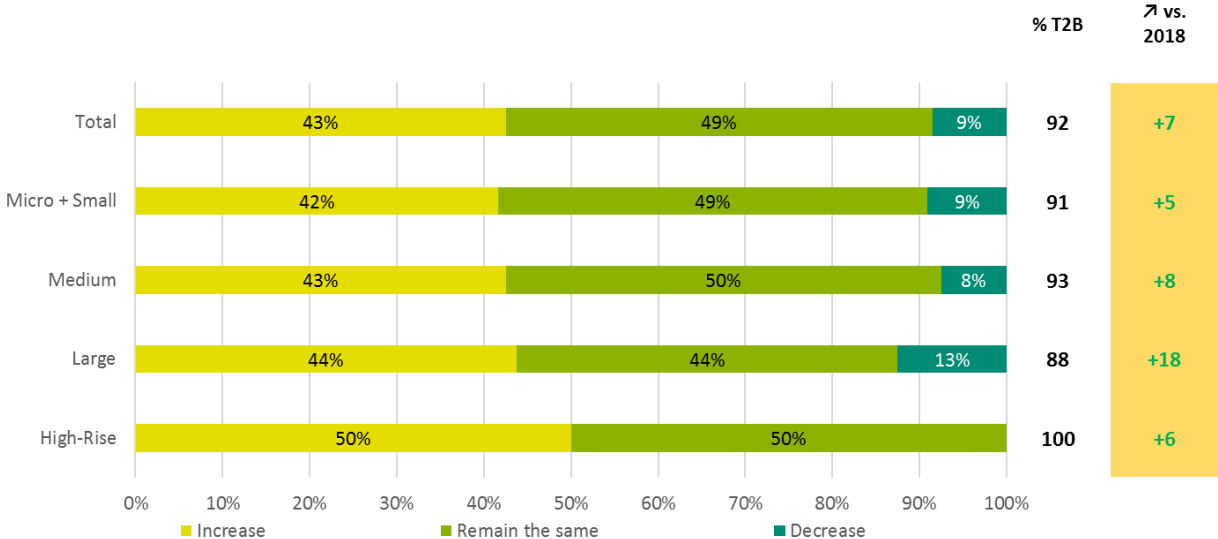
The survey began with a few short questions to help set builders’ impression of Tarion in the broader context of their views of what’s happening in the new residential construction market overall and their own company.

New Residential Building Activity – Market Outlook

9 in 10 builders (92%) surveyed agree that in the next 12 months, new residential building activity in the areas they operate will increase or remain the same. This demonstrates increased optimism in the market since scores increased by 7% from the previous year.

While all builder types are confident that new residential building activity will increase or remain the same, High-Rise builders have an especially more positive outlook on the market (100%). Market outlook has increased for all builders this year by 5% to 18% from 2018.

There is little relationship between overall impressions of Tarion or strength of the relationship with Tarion and market outlook.

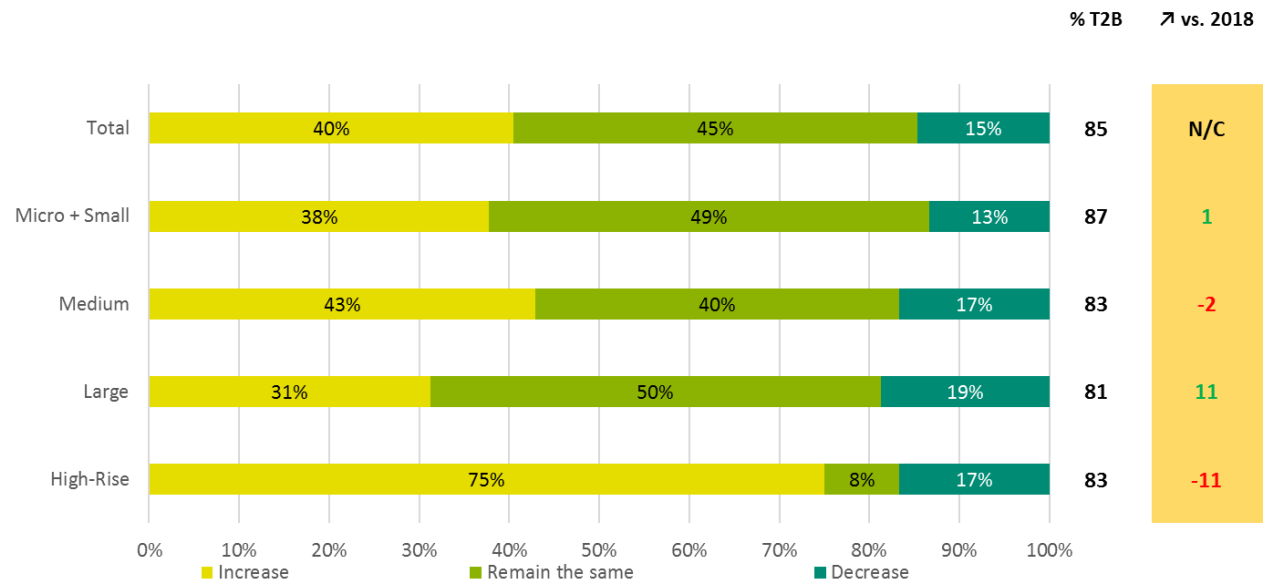


Source: C1. In the next 12 months, would you say new residential building activity in the areas you operate will increase, remain the same, or decrease? (N=200)

New Residential Building Activity – Company Outlook

Overall, most builders (85%) are optimistic about their own companies' prospects, which remains unchanged from 2018.

Micro and Small volume builders have the most positive outlook on their own new residential building activity (87%). Similar to the previous year, Large volume builders have the least positive outlook and are less likely to think large builders' activity will increase or stay the same; however, this score increased by 11% from 2018. In contrast, High-Rise volume builders' outlook for residential building activity for their company decreased by 11% to 83% in 2019.



Source: C2. Also in the next 12 months, would you say [YOUR] new residential building activity will increase, remain the same, or decrease? (N=205)

Top Issues Facing Ontario Builders

Core Challenges

Builders were asked an open-ended question regarding the biggest challenge facing their companies over the next 12 months. In 2019, the biggest challenge forecasted by builders, by far, is...

1. Availability of skilled labour/tradespeople (31%)

This challenge has remained a top issue for builders for many years. In 2018, it was the second biggest challenge facing builders (23%) and in 2015 to 2017, this was the top challenge (14% in 2015, 31% in 2016, 31% in 2017).

The other main issues or challenges that Tarion should be aware of as it creates strategies to strengthen relationships with builders are:

2. Finding land to build on/acquisition/development (14%)
3. Economy/recession/consumer confidence/market conditions (13%)
4. Government regulation/permit/fees/demands (10%)

The financial challenges that builders face have decreased from last year from 10% to 5%.

Challenges related to meeting deadlines and closing on time (1%), and the weather (1%) remain less of an issue for builders.

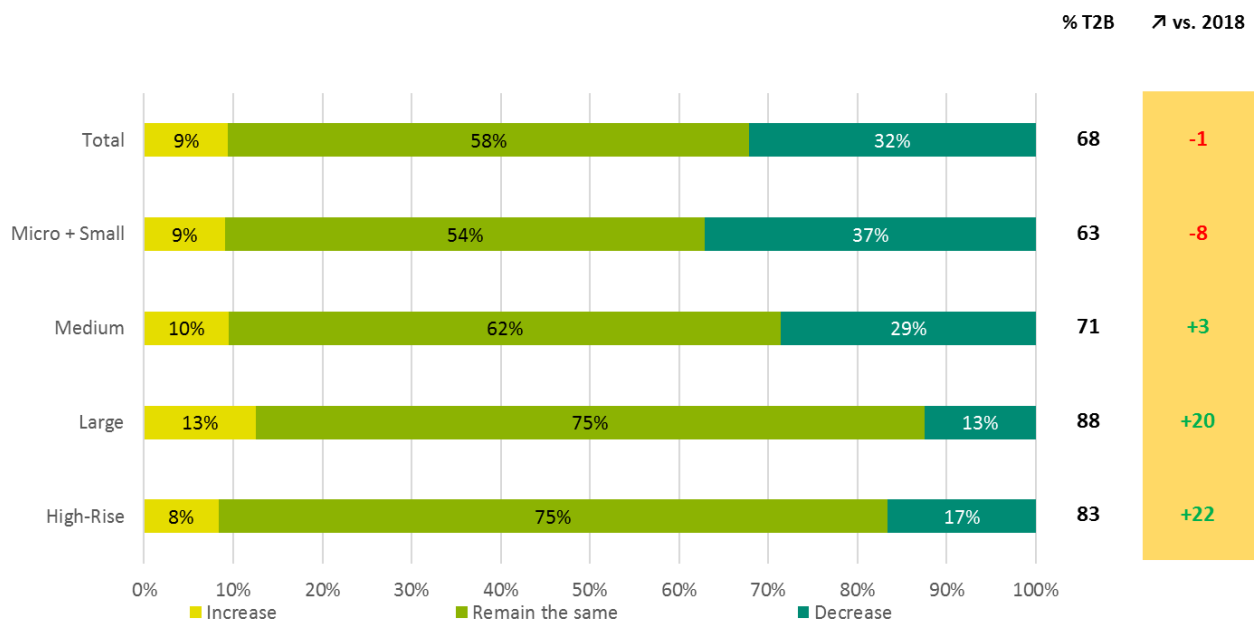
Biggest Change	2019 %	2018 %	2017 %	2016 %	2015 %	2013 %	2011 %
Availability of skilled labour/tradespeople	31	23	31	31	14	9	7
Finding land to build on/acquisition/development	14	11	19	14	13	7	10
Economy/recession/consumer confidence/market conditions	13	26	16	13	11	12	21
Government regulation/permit/fees/demands	10	9	9	12	9	14	9
Increasing home/land costs/staying under budget	6	4	4	6	10	6	7
Financing/financial challenges	5	10	8	2	5	13	3
Meeting deadlines/Closing on time	1	3	4	-	-	-	-
Weather/Bad weather slows down work	1	2	2	-	-	-	-
Non-registered builders/Too much competition	-	1	1	-	-	-	-
Sales/marketing/finding and qualifying buyers	-	-	-	-	6	11	15

Outlook for Overall Quality of Skilled Labour

At the overall level, builder concerns regarding the quality of skilled labour in the new residential building trades are similar to that of 2018 scores with 68% saying quality will increase or remain the same, which is a 1% decrease from 2018.

Large volume (88%) and High-Rise (83%) builders are more optimistic that the quality of skilled labour will improve or remain the same compared to other builders and also when compared to the previous year (up 20% to 22%).

Micro and Small builders are less optimistic (63%) when compared to other builders and when compared to the previous year (down 8%).



Source: C4. In the next 12 months, would you say the overall quality of skilled labour in the new residential building trades in the areas you operate will increase, remain the same, or decrease? (N=202)

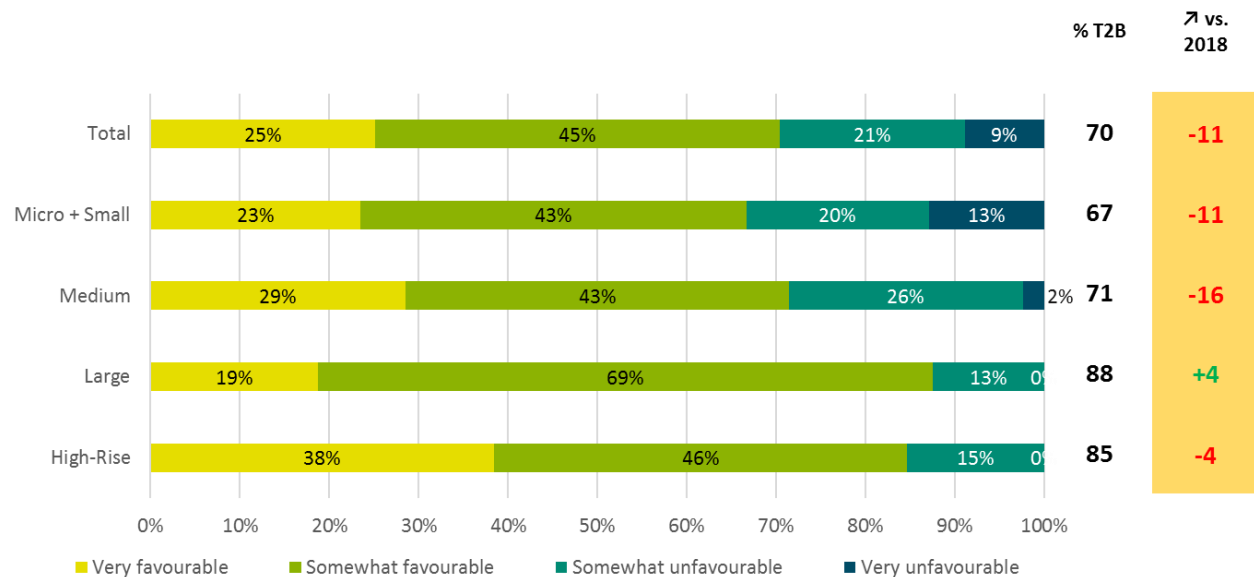
Builders' Impression of Tarion

Overall Impression of Tarion – Based on Personal Experience

Based solely on personal experience, overall performance ratings of Tarion have remains favourable but showing signs of negative change. 7 in 10 (70%) have a very or somewhat favourable impression of Tarion, which is an 11% decrease from the previous year.

Large (88%) and High-Rise (85%) volume builders have more favourable impressions of Tarion compared to other builders. In contrast, Micro and Small volume builders have the lowest score compared to other builders (67%), which is also an 11% decrease from the previous year.

Medium volume builders had the largest decrease in favourability from the previous year with a 16% decrease to 71% in 2019.



Source:

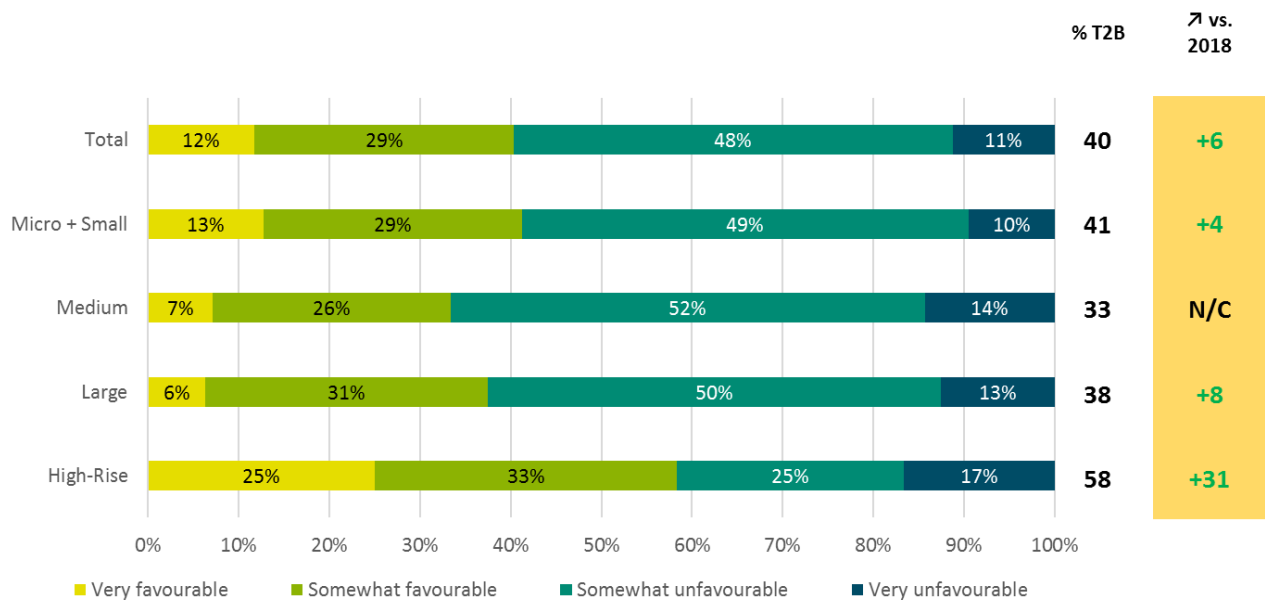
QD1A. Now onto the Tarion questions... Based on what you have read, seen or heard about TARION, or experienced yourself, would you say your opinion of the organization is...? (N=203)

Overall Impression of Tarion – Based on External Media Coverage

Based on what builders have read, seen, or heard about Tarion, the impression of Tarion is not as strong as their personal impressions amongst all builders. Overall, 4 in 10 (40%) of builders have a very or somewhat favourable opinion of Tarion, which is a 6% increase from 2018.

Impressions of Tarion have become more favourable amongst almost all builders when compared to the previous year (up 4% to 31%), with the exception of Medium volume builders (no change from the previous year).

High-Rise builders have the most favourable impression of Tarion (58%) when compared to other builders (33% to 41%). This score for High-Rise builders also saw the greatest increase from 2018 (up 31%).



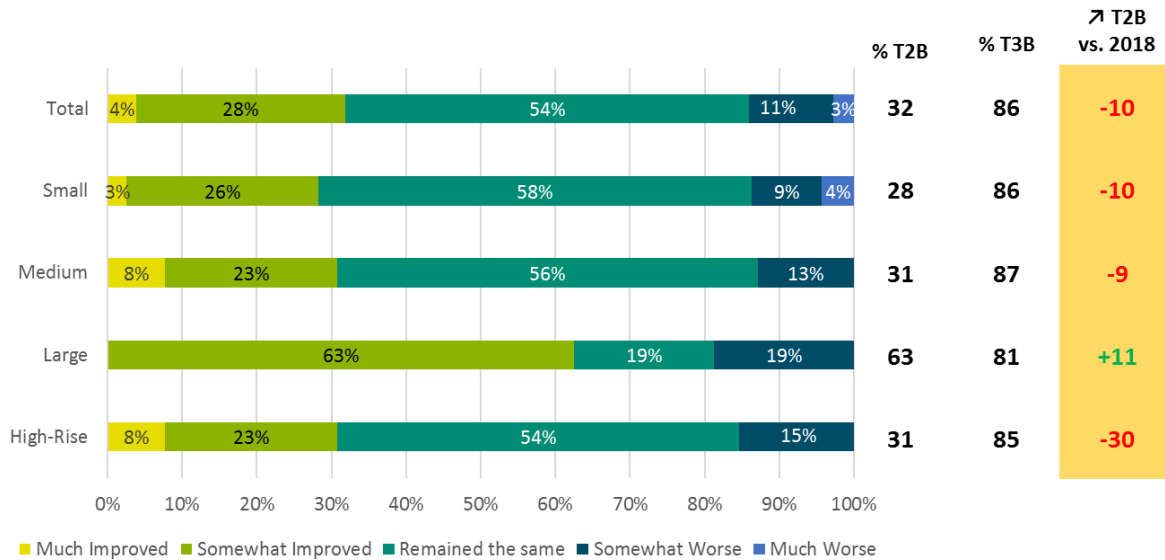
Source:

QD1B. Putting aside your own experience with TARION, based on what you have read, seen or heard about TARION, would you say people's opinion of the organization is...? (N=196)

Commitment to Customer Service

Overall, builders' perceptions of Tarion's improvement to ongoing commitment to customer service have declined by 10% from 2018 (42% in 2018 to 32% in 2019). Over half (54%) say Tarion's commitment to customer service has remained the same. Furthermore, there are early signs of the service declining with 15% saying service is somewhat or much worse compared to 2018 (4%).

Improvement in Tarion's commitment to customer service has declined for almost all builder types by 9% to 30% from the previous year, with the exception of Large volume builders. Almost 2 in 3 (63%) of Large volume builders say Tarion's commitment to customer service has improved, which is the highest score compared to other builders. This was also the only score that increased from 2018 (up 11%).



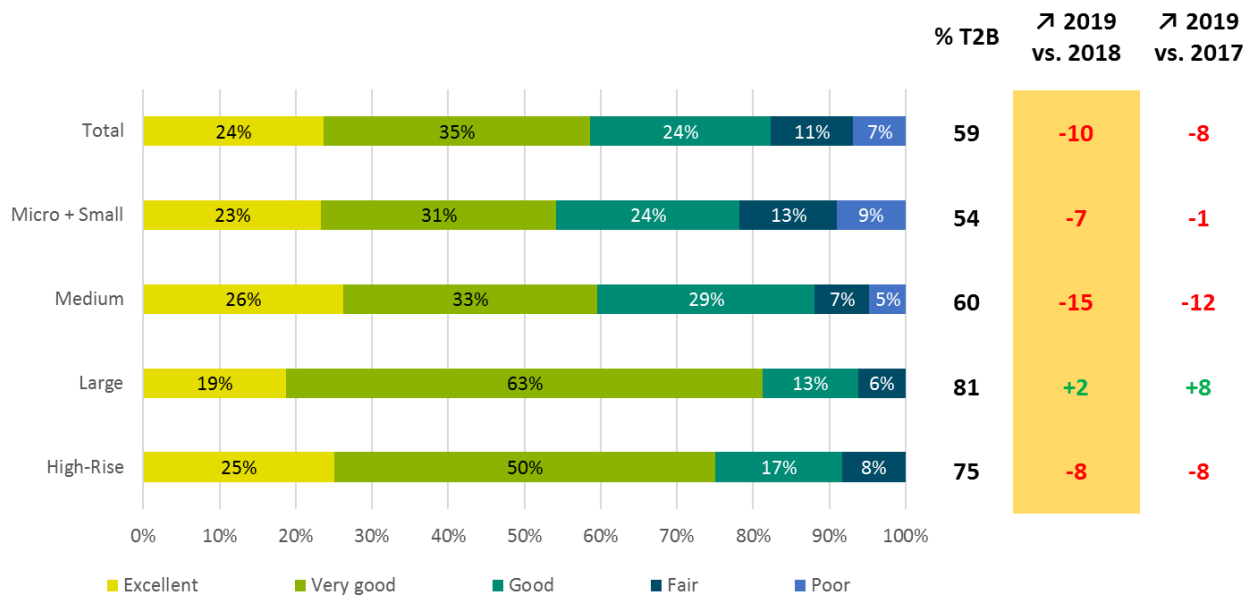
Source: F2A. Over the past two years, how has Tarion's commitment to customer service changed? Would you say it is... (N=185)

Strength of the Builder Relationship with Tarion

Overall, builders' views of their relationship with Tarion have weakened in 2019 when compared to 2018, with 59% saying they have an excellent or very good relationship with Tarion (down 10% from 2018).

Large volume builders have a stronger relationship with Tarion compared to other builders (81% compared to 54% to 75%), and their relationship with Tarion was the only one to have strengthened from the previous year (up 2% from 2018).

The builder relationship with Tarion has decreased for all other builders (down 7% to 15%), with Medium volume builders having the largest drop of 15% (75% in 2018 to 60% in 2019). Micro and Small volume builders continue to have the weakest relationship with Tarion when compared to other builders (54% compared to 60% to 81%).



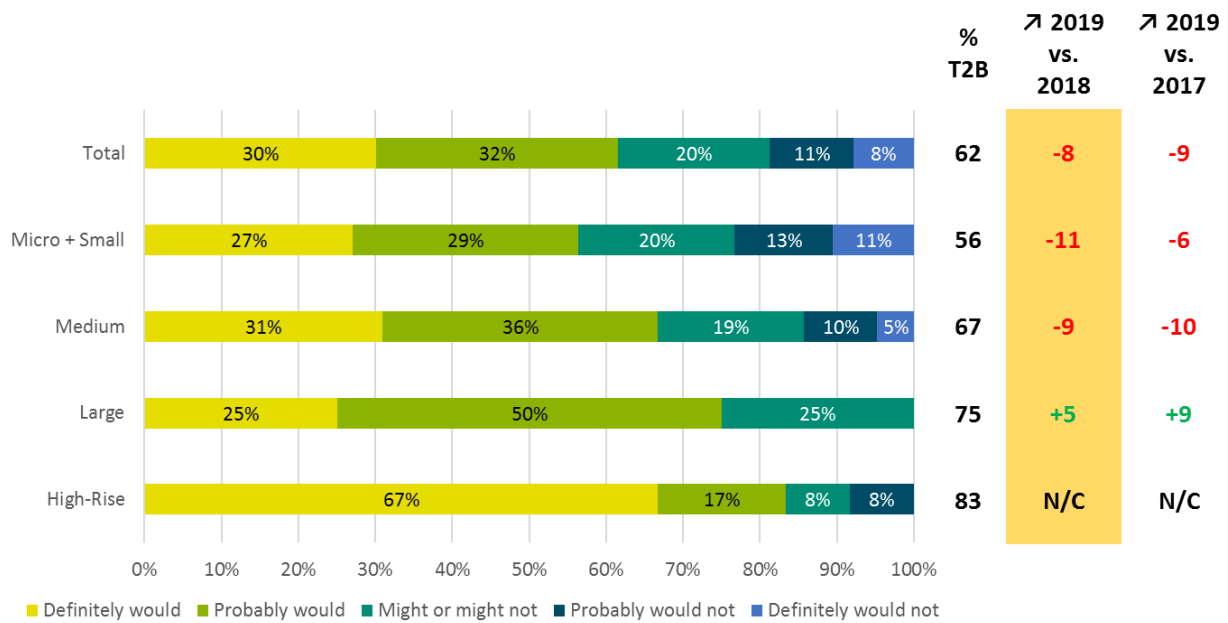
Source:

QF6A. Taking all things into consideration, how would you rate your overall relationship with Tarion? Would you say your relationship is...? (N=203)

Tarion Advocacy

“Advocacy” is commonly measured by asking survey respondents about their likelihood to recommend an organization or say positive things about it to others.

At the overall level, 6 in 10 (62%) of builders say they would say positive things about Tarion, which has decreased by 8% from 2018. When comparing various builder categories, High-Rise builders are most willing to advocate for Tarion (83%) and this remains unchanged from previous years. Furthermore, 2 in 3 (67%) High-Rise builders say they definitely would say positive things about Tarion. In contrast, advocacy for Micro and Small builders is lowest compared to other builder categories (56%). Advocacy for Micro and Small builders also had the greatest drop from the previous year (down 11%).



Source:

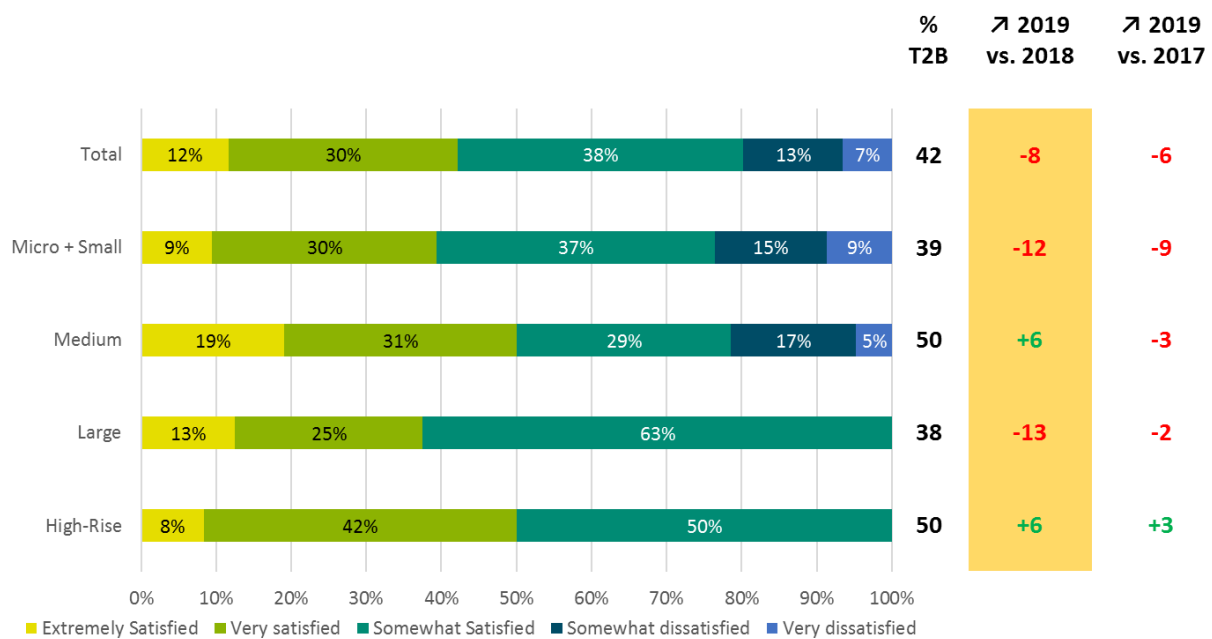
QF7A. If asked by another builder, how likely would you be to say positive things about Tarion? Would you say you...? (N=203)

Overall Performance Perceptions

Satisfaction with Tarion's overall performance over the last two years has decreased by 8% from the previous year (50% in 2018 to 42% in 2019).

Both Micro and Small volume and Large volume builders had a drop in satisfaction with Tarion's overall performance by 12% to 13%. Micro and Small (39%) and Large (38%) volume builders are also less satisfied with Tarion's overall performance when compared to Medium (50%) and High-Rise (50%) builders. In contrast, satisfaction for Medium volume and High-Rise builders increased by 6% each from the previous year.

All High-Rise builders are extremely, very, or somewhat satisfied with Tarion's overall performance.



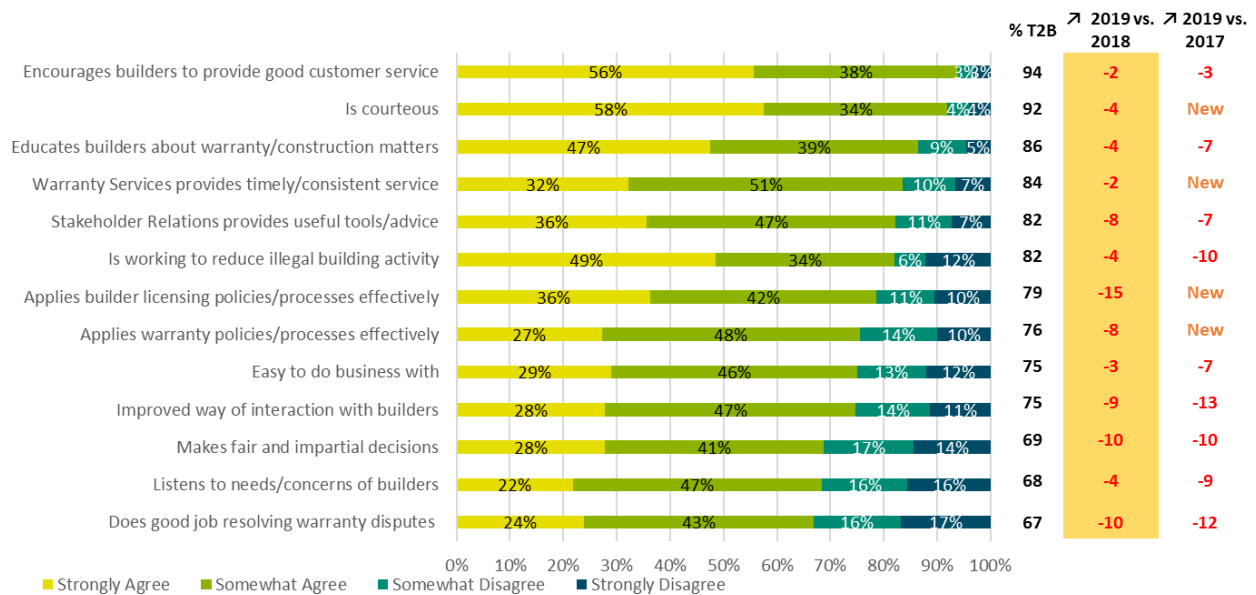
Specific Impressions of Tarion

The majority of builders have positive impressions of Tarion on a variety of specific service attributes. Almost all builders agree that Tarion:

- encourages builders to provide good customer service (94% agree; 56% strongly agree), and
- is courteous (92% agree; 58% strongly agree)

In contrast, while the majority of builders still agree with these statements, builders are less likely agree with the following statements regarding Tarion:

- makes fair and impartial decisions (69% agree),
- listens to needs/concerns of builders (68% agree), and
- does a good job resolving warranty disputes (67% agree)



Source:

QD6. I am going to read you a number of statements, and I would like to know whether you strongly agree, somewhat agree, somewhat disagree or strongly disagree with each statement. How about...?

Tarion Image Attributes

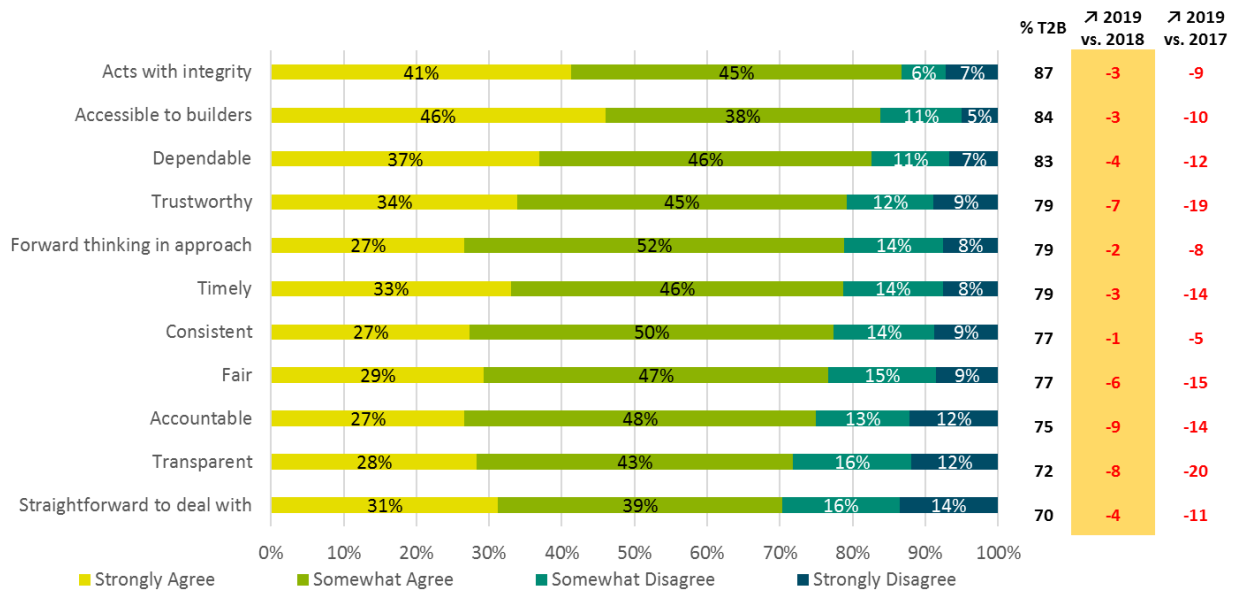
Builders were asked to choose which traits best describe Tarion from a given list.

The three traits that they most strongly associate with Tarion are,

- acts with integrity (87% agree; 41% strongly agree)
- accessible to builders (84% agree; 46% strongly agree)
- dependable (83% agree; 37% strongly agree)

The top three traits most associated with Tarion remains unchanged from 2018.

Two interrelated traits, being transparent (72%) and being straightforward to deal with (70%) were the lowest rankings amongst all attributes associated with Tarion.



Source:

QD7. How much do you agree or disagree that each of the following words describes Tarion? How about...?

Builder Licensing and Home Enrolment

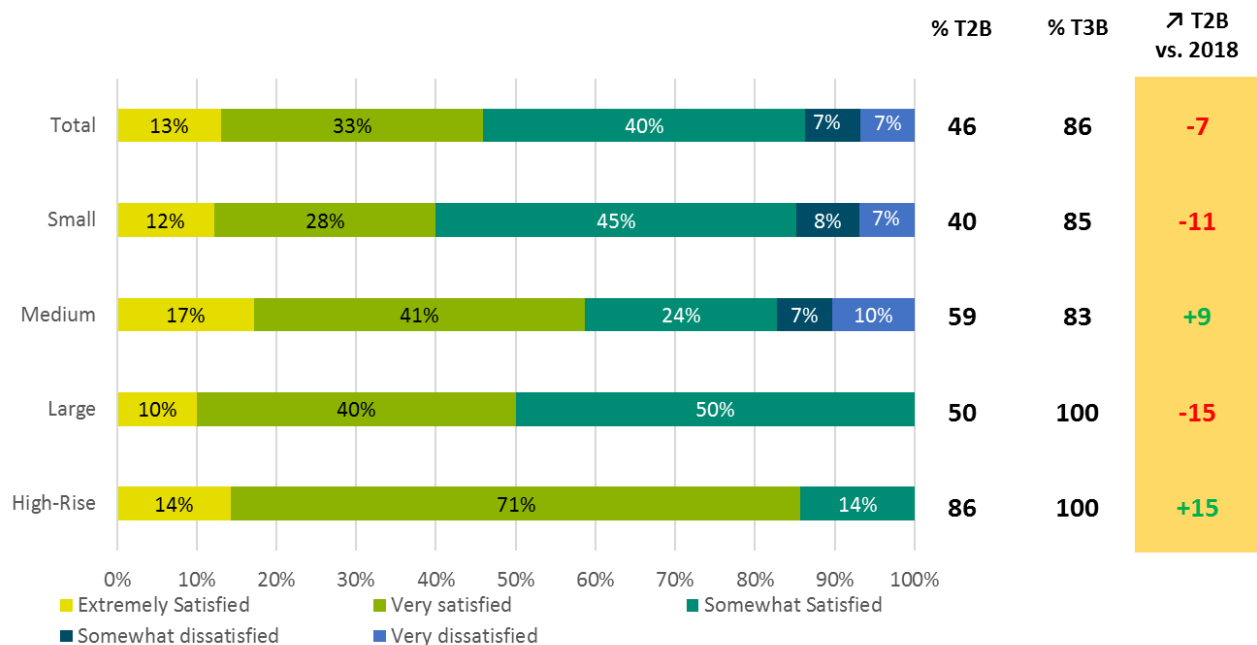
Areas of evaluation in the 2019 survey again included builders' satisfaction with Tarion's Builder Licensing and Home Enrolment processes.

Builder Licensing Process

Overall, almost half of the builders (46%) are satisfied with Tarion's builder licensing process, which is a 7% decrease from the previous year. The majority (86%) are extremely, very, or somewhat satisfied with Tarion's builder licensing process.

When compared to other builder categories, Large and High-Rise volume builders are most satisfied with the builder licensing process (50% of Large and 86% of High-Rise builders). Furthermore, they do not show any dissatisfaction with this process (100% are extremely, very, or somewhat satisfied).

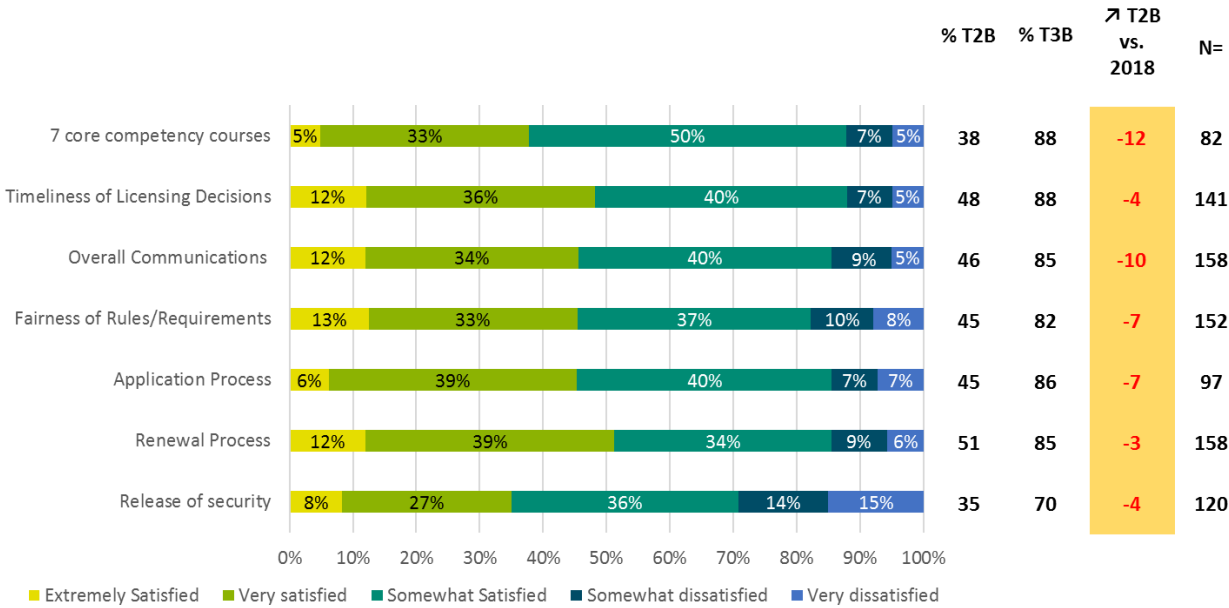
Small volume and Large volume builders are less satisfied with the builder licensing process when compared to the previous year, decreasing by 11% for Small builders (51% in 2018 to 40%) and 15% for Large builders (65% in 2018 to 50%).



Source: E1. Taking all things into consideration, how satisfied are you with Tarion's builder licensing process? Are you...? (N=161)

Builders' satisfaction (T3B) with specific areas of the builder licensing process is highest for the 7-core competency courses (88%) and the timeliness of licensing decisions (88%), followed by the application process (86%).

When looking at extremely or very satisfied scores (T2B), builders are most satisfied with the renewal process (51%) followed by the timeliness of licensing decisions (48%). Furthermore, all areas of the builder licensing process have declined in terms of satisfaction (T2B) when compared to 2018, especially for the 7 core competency courses (down 12%) and overall communications (down 10%).



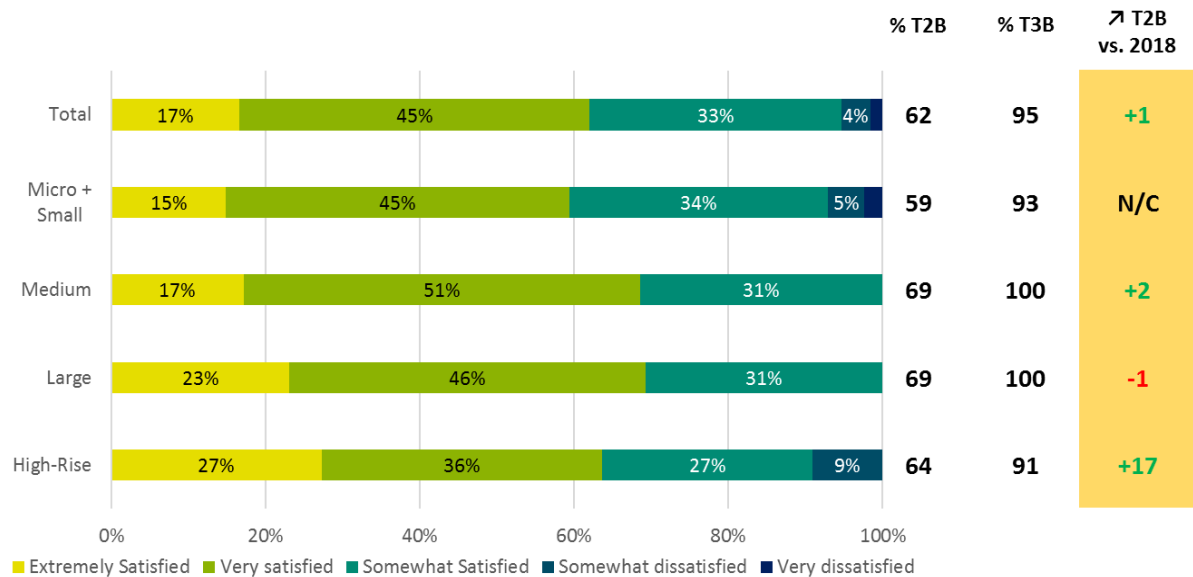
Source:E2A. Thinking more specifically about Tarion's builder licensing process, how satisfied are you with ...?

Home Enrolment Process

In 2019, satisfaction with the home enrolment process remained relatively unchanged from the previous year (61% extremely or very satisfied in 2018 compared to 62% in 2019).

Medium and Large volume builders are most satisfied with the home enrolment process when compared to other builders (69% extremely or very satisfied compared to 59% to 64%). Furthermore, Medium and Large volume builders do not show any dissatisfaction with this process (100% extremely, very, or somewhat satisfied).

Satisfaction (T2B) with the home enrolment process increased the most from 2018 for High -Rise builders (up 17% to 64% in 2019).

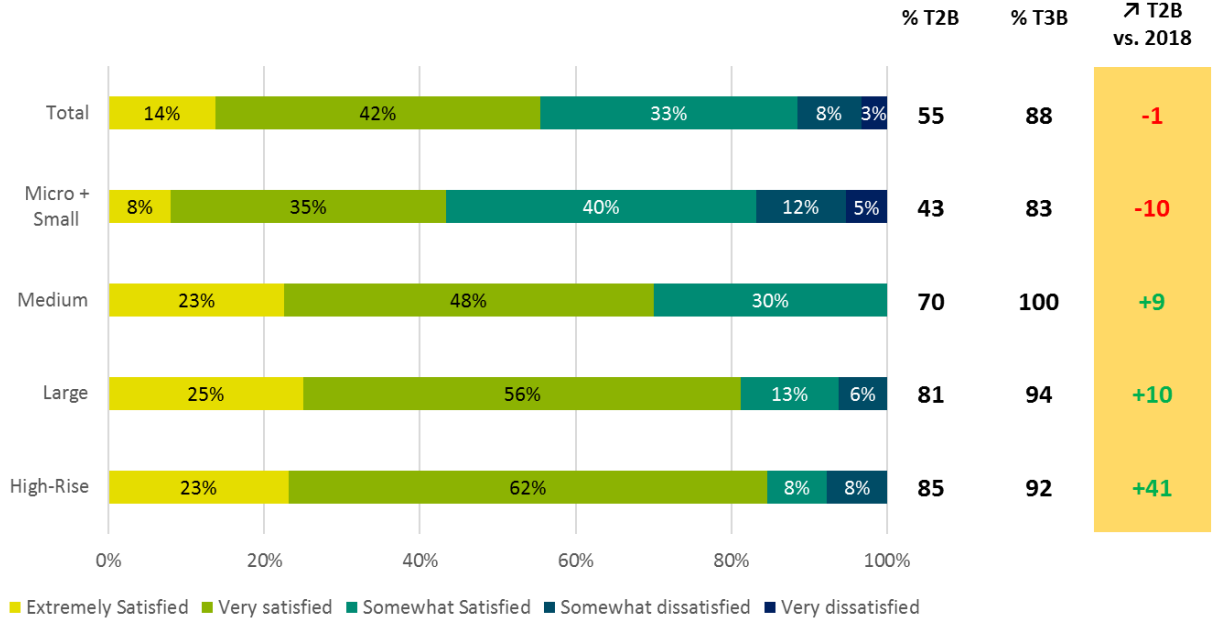


Source: E3. How satisfied are you with Tarion's home enrolment process? Are you...? (N=187)

BuilderLink satisfaction remains relatively high when looking at the T3B score; almost 9 in 10 (88%) are satisfied with the functionality and usability. Over half (55%) are satisfied (extremely or very) with the functionality and usability of BuilderLink, a score which remains stable from the previous year.

Looking at the T2B scores, satisfaction with the functionality and usability of BuilderLink for most builder categories has increased from the previous year by 9% to 41%. Satisfaction for High-Rise builders increased the most from 44% in 2018 to 85% in 2019. Micro and Small volume builders are the only exception, with a decreased satisfaction score from 2018 (down 10% from 53% in 2018 to 43%).

Medium volume builders demonstrated no dissatisfaction with the functionality and usability of Builderlink (100% are extremely, very, or somewhat satisfied).

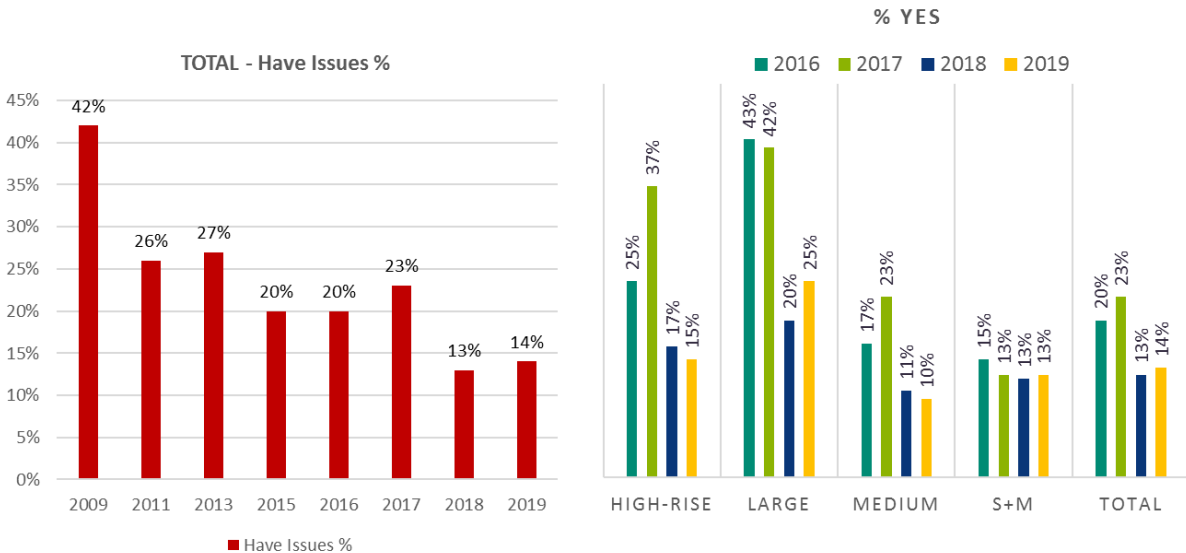


Source: D8B. Overall, how satisfied are you with the functionality and usability of BuilderLink?
 Base: D2B. = "Yes" (N=182)

Concerns and Builder-Driven Suggestions for Improvement

Builders' Major Concerns / Issues with Tarion

The long-term decline in the proportion of builders reporting they have issues with Tarion or major concerns about changes Tarion has continued in 2019. 14% reported issues this year, which has not changed significantly from the previous year (13% in 2018). Large-volume builders continue to be the most likely to have issues with Tarion or major concerns about changes made (25%, compared to 10%-15%).



Among the 14% of builders who express concerns, the top issue is surrounding poor customer service, not providing help, not answering questions (18%) and the costs of fees and deposits (18%), followed by being hard to reach, not answering the phone, not calling back, or being slow to call back (14%). In contrast, Tarion has improved on issues such as the difficultness of the conciliation or warranty process (from 23% in 2018 to 7%), warranty being unclear or too subjective as to what is covered (20% in 2018 to none), and Tarion solicits or charges for conciliations (9% in 2018 to none).

Major Issues / Concerns	2019%	2018%	2017 %	2016 %
Poor customer service/Don't provide help/Don't answer questions	↑ 18	17	14	30
Costs of fees/Deposits etc.	↑ 18	6	-	-
Hard to reach/Don't answer phone/Don't call back/Slow to call back	↑ 14	9	10	17
Warranty standards keep changing/Keeps getting harder for the builder	↑ 7	6	21	9
Conciliation/Warranty process is difficult for builder	↓ 7	23	33	36
Online features are difficult to access/Not accessible	↓ 7	20	3	13
Tarion doesn't listen to builders/Ignores builder input	↑ 7	3	11	23
Decisions are unfair to the builder/Inconsistent/Unbalanced	↓ 4	17	29	57
Illegal builders are not dealt with adequately	↓ 4	-	-	-
Tarion solicits/Charges for conciliations	↓ -	9	16	21
Warranty is unclear/Too subjective as to what is covered	↓ -	20	-	9

Source: F4A. And what are those issues or major concerns? Base: F3A = "Yes", Had issues with Tarion or major concerns about changes they've made in the last two years. (N=28) *Please take into consideration the small sample size when interpreting results.

Suggested Improvements to Assist Builders

The most important improvements that Tarion could make to assist builders include improvements to the overall process of payments, renewals, guidelines, and forms that would ensure fairness, efficiency, and simplicity (14%) followed by improvements to the warranty process by making it more consistent, balanced, and fair (13%). Improvements related to communication are also two of the top four most suggested improvements: being available and responding faster (11%) and providing more up-to-date information (9%).

Improvements to Assist Builders	2019 %	2018 %	2017 %	2016 %
Process - Simplify it/More Efficient/Be Fair	14	-	-	-
Warranty - More consistent process/More balanced/Fair decisions	13	18	20	28
Communication - Be available/Respond faster	11	17	12	15
Communication - More information/Up-to-date information/Bulletins	9	11	15	26
Warranty - Make it less complex/Easier to understand	8	10	10	26
Website - Easier to user/More user-friendly/Improve it	7	8	4	13
Communication - Be more knowledgeable/Listen/Answer questions	5	12	9	41
Builders - Crack down on illegal/Non-licensed builders	4	4	4	5
Costs - Reduce costs/Fees	3	7	7	6
Website - Easier to navigate/Find things/Better organization	1	3	5	16
Builders - Regulate/Monitor/Rate/Enforce standards	-	4	4	5

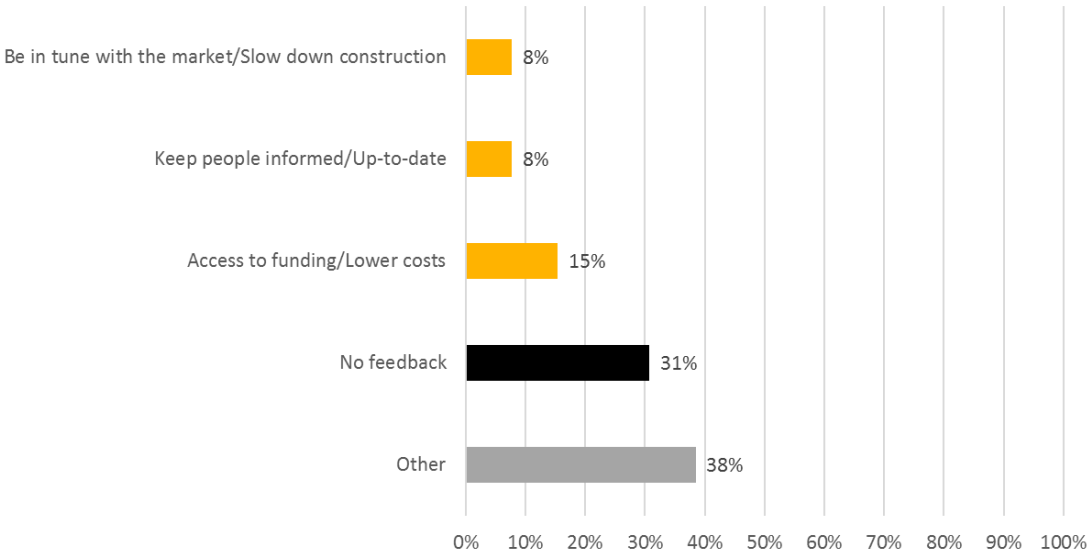
Industry Considerations and Website Feedback

Industry Considerations due to Condo Project Cancellations

When speaking only to High-Rise builders about what Tarion should be considering as an industry, considering recent public attention on cancellations of condo projects, overall, there was minimal feedback provided – about a third had no input (31%).

Of those builders who provided feedback, 8% equally recommended being in tune with the market, slowing down construction, and keeping people informed and up to date. 15% recommended access to funding or lower costs.

Please note the Small sample size when considering these results.

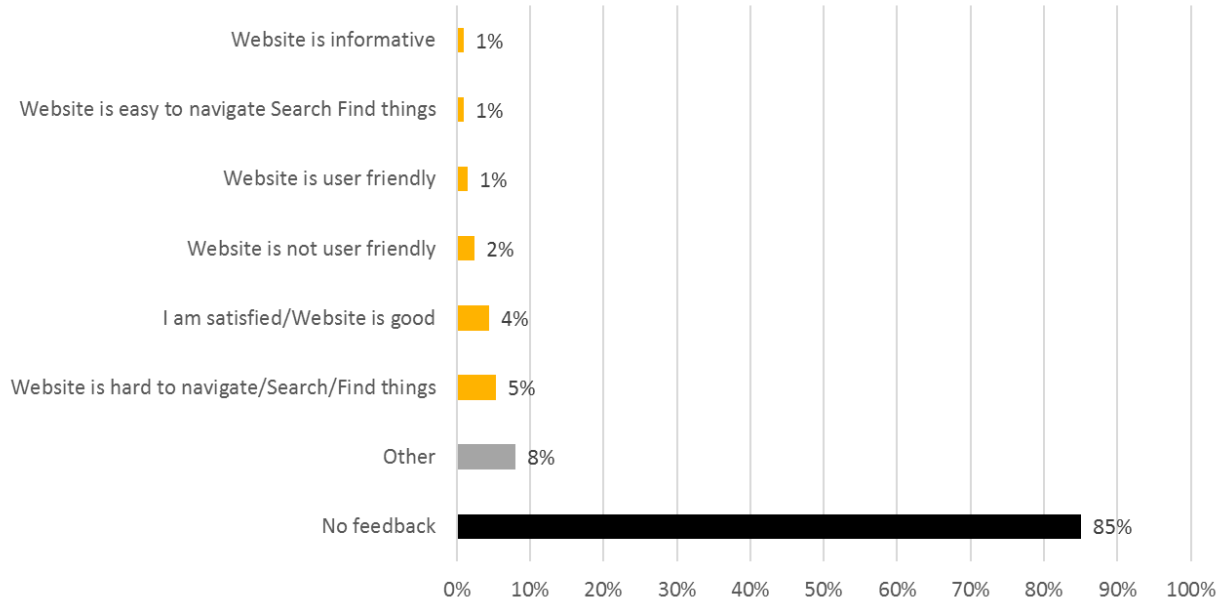


Source: C5. What do you think we should be considering as an industry, in light of recent public attention on cancellations of condo projects? (N=13: Only High-Rise) *Please note of the low valid response rate for those.

Tarion.com Website Feedback and Comments

When asking all builders surveyed if they have any comments or questions about the tarion.com public website, the majority did not have any feedback (85%).

5% found it hard to navigate, search, or find things on the website and 4% were satisfied and said the website is good.



Source: H4. Do you have any comment or feedback about the tarion.com public website? If so, please provide them. (N=206)

**APPENDIX –
2019 Builder Impressions Survey**

**Tarion Warranty Corporation
Builder Impressions Survey 2019-20**

Forum Research Inc.

3 October 2019

**Micro N=100
Small N=50
Medium N=100
Large N=75**

Section 1 – INTRODUCTION

A. SCREENER – Large Builders

[RECEPTION INTRO]

Hello, I'm _____ from Forum Research. May I speak to **[FIRST NAME, LAST NAME]**.

[WHEN WITH RESPONDENT]

Hello, I'm _____ from Forum Research. We are calling on behalf of Tarion Warranty Corporation. Tarion has asked us to interview a significant number of builders across Ontario on a number of important issues.

We will be asking about your impressions of Tarion and their processes. We will ask you to give your opinions based on your own experience and that of your company. The survey will take about **10 to 12** minutes of your time and is entirely confidential. The results will assist Tarion in understanding the needs and experiences of the building community in Ontario.

- | | | |
|----|---------------------------|------------------------------|
| 01 | Yes, will do survey now | → CONTINUE |
| 02 | Yes, will do survey later | → RESCHEDULE |
| T2 | No | → THANK AND TERMINATE |

IF NOT A GOOD TIME: I would like to arrange a time that would be more convenient. When would that be?

RESCHEDULE (DATE/TIME)

a. What is your job title? _____ **[RECORD, DO NOT CODE]**

B. SCREENER – Medium and Small Builders

[RECEPTION INTRO]

Hello, I'm _____ from Forum Research. May I speak to **[FIRST NAME, LAST NAME]**.

Hello, I'm _____ from Forum Research. We are calling on behalf of Tarion Warranty Corporation. Tarion has asked us to interview a significant number of builders across Ontario on a number of important issues. May I speak to the person in your organization who deals with customer service and warranty issues which involve Tarion?

[WHEN WITH RESPONDENT]

Hello, I'm _____ from Forum Research. We are calling on behalf of Tarion Warranty Corporation. Tarion has asked us to interview a significant number of builders across Ontario on a number of important issues.

We want to speak with the person in each organization who deals with customer service and warranty issues which involve Tarion. We will be asking for opinions and impressions of Tarion and their processes.

- a. Are you an appropriate person to interview at your company?

01	Yes	→ CONTINUE
T2	No	→ ASK FOR REFERRAL AND TERMINATE

IF Ba=T2, ASK FOR REFERRAL:

Can you recommend anyone else within your company who deals with Tarion on a regular basis and who would be willing to participate in this survey?

Name: _____

Phone Number 1: _____

Phone Number 2: _____ (OPTIONAL)

[ACCEPT REFERRAL, THANK, RETURN TO RESPONDENT INTRO]

We will ask you to give your opinions based on your own experience and that of your company. The survey will take about **10-12** minutes. It is entirely confidential. The results will assist Tarion in understanding the needs and experiences of the building community in Ontario.

01	Yes, will do survey now	→ CONTINUE
02	Yes, will do survey later	→ RESCHEDULE
T2	No	→ THANK AND TERMINATE

IF NOT A GOOD TIME: I would like to arrange a time that would be more convenient. When would that be?

RESCHEDULE (DATE/TIME)

- b. What is your job title? _____ **[RECORD, DO NOT CODE]**

Section 2 – SURVEY

C. Market Experiences and Outlook

- C1. To begin, we have a couple of questions about new residential building activity in the areas you operate. In the next 12 months, would you say new residential building activity in the areas you operate will increase, remain the same, or decrease?

- 3 Increase
- 2 Remain the same
- 1 Decrease
- 9 Don't Know/Not Stated [DO NOT READ]

- C2. Also in the next 12 months, would you say [INSERT COMPANY NAME] new residential building activity will increase, remain the same, or decrease?

- 3 Increase
- 2 Remain the same
- 1 Decrease
- 9 Don't Know/Not Stated [DO NOT READ]

- C3. What would you say is the ONE big challenge facing your company over the next 12 months? [ACCEPT & CODE ONE RESPONSE, PROBE]

- C4. In the next 12 months, would you say the overall quality of skilled labour in the new residential building trades in the areas you operate will increase, remain the same, or decrease?

- 3 Increase
- 2 Remain the same
- 1 Decrease
- 9 Don't Know/Not Stated [DO NOT READ]

D. About Tarion

- D1. A) Now onto the Tarion questions... Based on your own experience with TARION, would you say your opinion of the organization is...? [READ LIST]

- 4 Very favourable
- 3 Somewhat favourable
- 2 Somewhat unfavourable
- 1 Very unfavourable
- 9 Don't Know/Not Stated [DO NOT READ]

D1. B) Putting aside your own experience with TARION, based on what you have read, seen or heard about TARION, or experienced yourself, would you say peoples opinion of the organization is...?

[READ LIST]

- 4 Very favourable
- 3 Somewhat favourable
- 2 Somewhat unfavourable
- 1 Very unfavourable
- 9 Don't Know/Not Stated **[DO NOT READ]**

D2. Which of the following activities have you or others at your company undertaken in the last two years? How about....? **[ROTATE, READ LIST]**

- 1 Yes
- 2 No

- a) Visited Tarion's website
- b) Used the Tarion builder portal called BuilderLink
- c) Called Tarion's toll free line 1-877-9TARION
- d) Attended a Tarion Builder Update or other education session
- e) Consulted with a member of Tarion's Stakeholder Relations Department, formerly Builder Relations
- f) Interacted with a member of Tarion's Licensing & Underwriting Department
- g) Interacted with a member of Tarion's Warranty Services Department
- h) Displayed the Tarion Registered Builder certificate in a sales office
- i) Spoken to the Tarion call centre
- j) Referred to the Construction Performance Guidelines and/or referred a customer to them
- k) Had a conciliation inspection
- l) Read a "Breaking Ground" newsletter

D3. Taking all things into consideration, how satisfied are you with your interactions with Tarion? Are you...? **[READ 1-5]**

- 5 Extremely Satisfied
- 4 Very satisfied
- 3 Somewhat Satisfied
- 2 Somewhat dissatisfied
- 1 Very dissatisfied
- 8 Have had no interactions **[DO NOT READ]**
- 9 Don't Know/Not Stated **[DO NOT READ]**

[ASK IF D2b=1]

D8a. You mentioned you or others in your company have used BuilderLink. More specifically, which of these have you used BuilderLink for? **[READ LIST, ACCEPT ALL]**

- 1 Online Enrolments
- 2 An Inspection Search
- 3 A Repair Period Search
- 4 Delayed Closing/Occupancy Addendums
- 5 Find Builder Statistics
- 6 Review of warranty forms and reports
- 7 Tracked repair timelines
- 10 Completed and printed a Certificate of Completion and Possession (CCP)
- 11 Registration renewal
- 8 Have not used **[DO NOT READ]**
- 9 Don't Know/Not Stated **[DO NOT READ]**

[ASK IF D2b=1]

D8b. Overall, how satisfied are you with the functionality and usability of BuilderLink? **[READ LIST]**

- 5 Extremely Satisfied
- 4 Very satisfied
- 3 Somewhat Satisfied
- 2 Somewhat dissatisfied
- 1 Very dissatisfied
- 8 Have not personally used **[DO NOT READ]**
- 9 Don't Know/Not Stated **[DO NOT READ]**

[ASK IF D2b=1]; [ASK IF D8b=2 or 1 (Very/Somewhat dissatisfied)]

D8c. Why do you say you're **[D8b RESPONSE]** with the functionality and usability of BuilderLink?
[PROBE, CODE ALL MENTIONS]

D4. In general, do you feel you know who to contact at Tarion when you have the need?

- 1 Yes
- 2 No

D5. Which ONE contact area or department are you most likely to start with if you need to contact Tarion? **[DO NOT READ LIST]**

[IF D5= 1 "Stakeholder / Builder Relations" or 2 "Licensing & Underwriting" or 4 "Warranty Services", PROBE FOR ONE NAMED INDIVIDUAL OR CODE AS UNSPECIFIED]

- 1 Stakeholder Relations (formerly Builder Relations) **[Specify Contact: _____]**
- 2 Licensing & Underwriting... **[Specify Contact: _____]**
- 3 Customer Service Centre / Toll-free line
- 4 Warranty Services Representative
- 5 Warranty Services Coordinator

- 6 Technical Desk
- 77 Other (**Specify**) _____
- 99 Don't know / Not Stated [**DO NOT READ**]

D6. I am going to read you a number of statements, and I would like to know whether you strongly agree, somewhat agree, somewhat disagree or strongly disagree with each statement. How about...?

- 4 Strongly Agree
- 3 Somewhat Agree
- 2 Somewhat Disagree
- 1 Strongly Disagree
- 9 Don't Know/Not Stated [**DO NOT READ**]

[ROTATE]

- a. Tarion is easy to do business with
- b. Tarion listens to the needs and concerns of builders
- c. Tarion encourages builders to provide homeowners with good customer service
- d. Tarion is working to reduce illegal building activity
- e. Tarion has improved the way that it interacts and communicates with builders
- f. Tarion does a good job of resolving warranty disputes between homeowners and builders
- g. Tarion makes fair and impartial decisions
- h. Tarion's Stakeholder (Builder) Relations Department provides useful tools and advice
- i. Tarion does its part to educate builders about important warranty and construction matters
- j. Tarion consistently applies warranty policies and processes effectively
- k. Tarion consistently applies builder licensing policies and processes effectively
- l. Tarion is courteous
- m. Tarion's Warranty Services provides timely and consistent service

D7. How much do you agree or disagree that each of the following words describes Tarion? How about...?

- 4 Strongly Agree
- 3 Somewhat Agree
- 2 Somewhat Disagree
- 1 Strongly Disagree
- 9 Don't Know/Not Stated [**DO NOT READ**]

[ROTATE]

- a. Timely
- b. Accessible to builders
- c. Fair
- d. Accountable
- e. Consistent
- f. Transparent
- g. Trustworthy

- h. Acts with integrity
- i. Dependable
- j. Forward thinking in its approach
- k. Is straightforward to deal with

E. Tarion's Builder Licensing & New Home Enrolment Process

E1. Now we have a few questions about Tarion's builder licensing process...Taking all things into consideration, how satisfied are you with Tarion's builder licensing process? Are you...?

[READ LIST]

- 5 Extremely Satisfied
- 4 Very satisfied
- 3 Somewhat Satisfied
- 2 Somewhat dissatisfied
- 1 Very dissatisfied
- 8 Have had no interactions /experience with Tarion's builder licensing process **[DO NOT READ] →SKIP TO E3**
- 9 Don't Know/Not Stated **[DO NOT READ] →SKIP TO E3**

E2. Thinking more specifically about Tarion's builder licensing process, how satisfied are you with ...?

- a) The application process for new builders
- b) The timeliness of licensing decisions
- c) The fairness of the registration rules and requirements
- d) The renewal process
- e) The overall communications from Tarion related to licensing
- f) Release of security
- g) 7 core competency courses

E3. How satisfied are you with Tarion's home enrolment process? Are you...? **[READ LIST]**

- 5 Extremely Satisfied
- 4 Very satisfied
- 3 Somewhat Satisfied
- 2 Somewhat dissatisfied
- 1 Very dissatisfied
- 8 Have had no interactions **[DO NOT READ]**
- 9 Don't Know/Not Stated **[DO NOT READ]**

F. Summary

F1. How satisfied are you with Tarion's overall performance over the last two years? Are you...
[READ LIST]

- 5 Extremely Satisfied
- 4 Very satisfied
- 3 Somewhat Satisfied
- 2 Somewhat dissatisfied
- 1 Very dissatisfied
- 9 Don't Know/Not Stated **[DO NOT READ]**

F2. Over the past two years, how has Tarion's commitment to customer service changed? Would you say it is... **[READ LIST]**

- 5 Much Improved
- 4 Somewhat Improved
- 3 Remained the same
- 2 Somewhat Worse
- 1 Much Worse
- 9 Don't Know/Not Stated **[DO NOT READ]**

F3. Do you have any issues with Tarion or major concerns about changes they've made in the last year?

- 1 Yes
- 2 No → **[SKIP TO F5]**

[ASK F4 IF F3=YES, IF NOT, SKIP TO F5]

F4. And what are those issues or major concerns? **[ACCEPT & CODE ALL RESPONSES, PROBE]**

F5. From your perspective, what is the most important improvement Tarion could make to assist builders in the next year or two? **[ACCEPT & CODE ALL RESPONSES, PROBE]**

F5b. Over the past year, would you say the overall pace of change that Tarion has pursued as it serves its mandate has been.... **[READ LIST, ROTATE 1→5 OR 5→1]**

- 5 Much too rapid
- 4 A little to rapid
- 3 About right
- 2 A little too slow
- 1 Much too slow
- 9 Don't Know/Not Stated **[DO NOT READ]**

F5c. When Tarion does make a change in policy, the “Breaking Ground” newsletter is currently the primary method of communicating change. Is the “Breaking Ground” newsletter your most preferred method of being advised of change or is there another more suitable communication channel for you?

- 1 Yes, “Breaking Ground” is most preferred
- 77 No, other communication channel **(Specify)** _____
- 99 Don’t Know/Not Stated **[DO NOT READ]**

F5d. Tarion’s Stakeholder Relations team offers a variety of educational resources through Builder Updates and specific education sessions such as Conducting Better PDIs, Improving Customer Service, and Construction Performance Guideline Tutorials. Which other topics would be valuable to your staff and business? **[ACCEPT ALL RESPONSES, PROBE]**

- 77 **(Specify)**

- 99 Don’t Know/None Stated **[DO NOT READ]**

F6. Taking all things into consideration, how would you rate your overall relationship with Tarion? Would you say your relationship is...? **[READ LIST]**

- 5 Excellent
- 4 Very good
- 3 Good
- 2 Fair
- 1 Poor
- 8 Don’t Have a Relationship with Tarion **[DO NOT READ]**
- 9 Don’t Know/Not Stated **[DO NOT READ]**

F7. If asked by another builder, how likely would you be to say positive things about Tarion? Would you say you...? **[READ LIST]**

- 5 Definitely would
- 4 Probably would
- 3 Might or might not
- 2 Probably would not
- 1 Definitely would not
- 9 Don’t Know/Not Stated **[DO NOT READ]**

H. Channel Preferences

H1. Now I’d like you to think about how you or others in your company complete common transactions with Tarion including new home enrollments and builder license renewals. Which ONE of these is your/your company’s single most preferred way of interacting with Tarion for common transactions? **[READ AND ROTATE]**

- 1 Online using BuilderLink
- 2 By telephone using an automated menu response system
- 3 By telephone with a live Tarion representative
- 4 In person at Tarion’s corporate office
- 5 By traditional mail or courier
- 6
- 7 Emailing electronically scanned hard copy documentation to Tarion
- 8 No preference / All are suitable **[DO NOT READ]**
- 9 Don’t know / Not Stated **[DO NOT READ]**

H2. Which other ways of interacting with Tarion for common transactions are preferable to you or others in your company? **[READ AND ROTATE, SKIP H1 RESPONSES]**

- 1 Online using BuilderLink
- 2 By telephone using an automated menu response system
- 3 By telephone with a live Tarion representative
- 4 In person at Tarion’s corporate office
- 5 By traditional mail or courier
- 7 Emailing electronically scanned hard copy documentation to Tarion
- 8 No preference / All are suitable **[DO NOT READ]**
- 9 Don’t Know/Not Stated **[DO NOT READ]**

H4. Do you have any comment or feedback about the tarion.com public website? If so, please provide them.

- 9 No feedback

G. Classification Questions

G1. My last few questions are only for classification purposes. Is your company a member of your local Home Builders Association?

- 1 Yes → CONTINUE TO G2
- 2 No → SKIP TO G4
- 9 Don’t Know/Not Stated **[DO NOT READ]** → SKIP TO G4

[ASK G2, G3 IF G1=YES. IF NOT, SKIP TO G4]

G2. Do you or your colleagues belong to and/or attend meetings of your local Home Builders Association on a regular basis?

- 1 Yes
- 2 No
- 9 Don’t Know/Not Stated **[DO NOT READ]**

G3. Besides meetings, do you or your colleagues attend activities of your local Home Builders Association on a regular basis?

- 1 Yes
- 2 No
- 9 Don't Know/Not Stated **[DO NOT READ]**

G4. Does your company build primarily freehold or condominium homes? **[READ LIST]**

- 1 Freehold
- 2 Condo
- 3 Both
- 9 Don't Know/Not Stated **[DO NOT READ]**

G5. Approximately how many permanent full-time employees do you have? Is it...?

- 1 5 or fewer
- 2 6 to 10
- 3 11 to 25
- 4 More than 25
- 9 Don't Know/Not Stated **[DO NOT READ]**

THANK AND TERMINATE

Tarion would like to thank you for your time today. Your views will help Tarion make further improvements in the future.

G6. Record ID Number (VB/RA from sample)

G7. Record Telephone Area Code (XXX from sample)