



# 2020 Builder Impressions Survey

## Executive Summary and Detailed Findings

Prepared for: Tarion

5 May 2021

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## **Introduction**

This report highlights the results from a recently completed telephone survey of key personnel at registered builders in Ontario (“builders”). The report is designed to help Tarion understand their challenges and opportunities, in order 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 a 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, and modified it to include topical issues.

In 2020, Forum Research invited 1,713 home builders to complete the survey. Interviews were completed with 245 key personnel from a list of registered new home builders in Ontario, provided by Tarion. All surveys were completed between November 3<sup>rd</sup>, 2020 to January 11<sup>th</sup>, 2021. The response rate was 14.3% and the average survey length was about 20 minutes. 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 and conclusions from the research, followed by a detailed analysis of the results.

## Executive Summary

This report highlights the results from Tarion's 2020 Builder Impressions Survey of 245 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)
  - Specifically, to understand the impact of COVID-19 on builders and their reaction to Tarion's COVID-19 response
- 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.

## New Residential Building Activity – Company Outlook

- Overall, the vast **majority of respondents are optimistic** about their own companies' prospects. That is, 87% anticipate that their new residential building activity will increase or remain the same in the next 12 months, about the same level of optimism as last year.
  - Almost half of builders (45%) are predicting an *increase* in activity and this is consistent across builder types (Micro + Small, Medium volume builders, etc.).

## Impact of COVID-19

Builders are optimistic about their prospects despite the impact that COVID-19 has had on the industry.

Survey respondents were given a list of COVID-related issues and asked if their business had experienced any of them. Virtually all builders (98%) have faced at least one of the issues listed and most have experienced multiple problems. The most common issue, experienced by almost all builders is **materials shortages** (90% of builders). This is followed by **personnel issues**: 7-in-10 respondents report problems with **trade unavailability**/scheduling or **fewer workers** being allowed on site due to physical distancing guidelines.

- Generally, Micro + Small volume builders are less likely than other builders to have experienced most of these problems.
- High-Rise builders are *less* likely than other builders to have had issues with materials shortages, and *more* likely to have experienced delays from municipalities, both in obtaining permits and in municipal inspections.

Builders agree that the measures that Tarion has taken in response to COVID-19 are appropriate (e.g., pausing warranty timelines and repair periods, stopping in-person inspections). Overall, 92% of builders agree with Tarion's initiatives. More tellingly, 44% *strongly* agree – a robust response.

Overall, about two-thirds of builders (62%) are extremely/very satisfied with how Tarion has kept them informed of its COVID-19 measures and their impact on the industry.

## Other Major Issues and Challenges

In 2020, open-ended responses indicate that the **availability of skilled labour/tradespeople** continues to be among the biggest challenges facing companies over the next 12 months (cited by 21% of builders), as it has been since 2016. However, two other issues have increased significantly in importance since 2019, also emerging as major challenges this year:

- **Increasing home or land costs/staying under budget (16%)**
- **Again, the impact of the pandemic (10%).**

In 2020, other items that have been challenges in the past have declined significantly in importance, in light of the increasing home/land costs and the pandemic. Specifically, builders are less likely to see the following as challenges this year than they were in previous years:

- Finding land to build on/acquisition/development (5%)
- Economy/recession/consumer confidence/market conditions (5%)
- Government regulation/permit/fees/demands (4%).

## Builders' Overall Impressions of Tarion

**In 2020, overall impressions of Tarion largely stabilized after declining from as far back as 2017.**

- Overall, in 2020, 7-in-10 builders have a favourable impression of Tarion (72%) based on their **personal experiences**, and this is fairly consistent across builder types. This number is relatively unchanged from the previous year, following a significant decline between 2018-2019.
  - There is room to strengthen perceptions of builders by moving the *very favourable* score: overall, 1-in-4 builders have *very favourable* impressions of Tarion.

- After a significant decline in 2019, perceptions of Tarion’s **commitment to customer service** remained steady in 2020. Despite the 2019 decline, 88% of builders continue to indicate that Tarion’s commitment to customer service has improved or stayed the same. More tellingly, 1-in-3 builders (34%) believe the Tarion’s customer service has *improved*, a strong indicator of Tarion’s performance.
- In 2020, builders’ views of their **relationship with Tarion** continue to decline slightly. As a result, the percent of builders rating their relationship with Tarion as *excellent* or *very good* has decreased by 21% since 2017. In 2020, just over half of respondents (56%) feel that their overall relationship with Tarion is excellent/very good and this is consistent across all builders except High-Rise builders.
  - High-Rise builders seem to feel that their relationship with Tarion has strengthened since 2019, and now rate it more favourably than all other builders (93% excellent/very good). There is room for Tarion to strengthen its relationship with Small, Medium and Large volume builders (51%-61% excellent/very good relationship).
- The likelihood of **advocating for Tarion** stabilized in 2020, after experiencing a decline of 17% since 2017. In 2020, about 2-in-3 builders are likely to advocate for Tarion (64%), with 27% indicating that they would *definitely* say positive things about the organization.
- Satisfaction with Tarion’s **builder licensing process** is unchanged from 2019. In 2020, just under half of the builders (45%) are extremely/very satisfied with the process.
- In 2020, two-thirds of builders (67%) are extremely/very satisfied with the **home enrolment process**.
- Satisfaction with Tarion’s **overall performance** remained virtually unchanged in 2020, after having declined by 14% since 2017. In 2020, under half of all builders are extremely or very satisfied with Tarion’s performance (43%). Again, there is room to move this overall performance measure.

As in 2019, it is **High-Rise builders** that have the **most favourable impressions** of Tarion.

- They seem to have seen an increase in Tarion’s commitment to customer service since 2019 and to rate Tarion’s customer service more favourably than other builders (100% say it has improved or stayed the same versus 81%-89% of other builders).
- In 2020, High-Rise builders show a greater willingness to advocate for Tarion than other builders (50% *definitely* would vs. 19%-28% of other builders – a strong score) and their willingness has remained constant over the past couple of years.
- Satisfaction with Tarion’s overall performance among High-Rise builders continued its increase since 2017. As a result, 64% of High-Rise builders are satisfied with Tarion’s overall performance in 2020 – a higher satisfaction level than other builders (31%-47%).
- Generally, it is High-Rise builders who tend to agree most strongly that a list of positive traits describe Tarion (e.g., acts with integrity, trustworthy, accessible) and, along with Large volume builders, are most satisfied with how well Tarion has kept them informed of its COVID-19 measures. They also seem more satisfied with the builder licensing process than smaller builders.

In terms of other types of builders:

- Impressions of Tarion among **Micro + Small builders** are **generally the same** as in 2019, though their willingness to advocate for Tarion has significantly increased since then. They appear to be less satisfied other builders, however, with how well Tarion has kept them informed of its COVID-19 measures and with BuilderLink.

- **Medium volume builders'** satisfaction with Tarion's performance has **generally been consistent** with 2019. In 2020, Medium volume builders are more likely to have seen an improvement in Tarion's commitment to customer service (45%) than Micro + Small volume builders (30%), but their willingness to advocate for Tarion has continued its ongoing decline (61% now willing to advocate). They are more likely than other builders to agree with Tarion's response to COVID-19 (56% strongly agree).
- **Large volume builders** have shown **significant declines** since 2019 in the strength of their relationship with Tarion and willingness to advocate for Tarion. Large builders' satisfaction with Tarion's overall performance has continued its steady decline, culminating in lower ratings versus other builder types in 2020. In general, Large volume builders' ratings are on par with or directionally lower than Micro + Small and Medium volume builders in 2020. Large volume builders are least likely to agree that a list of positive traits describes Tarion (e.g., trustworthy, accessible).
- Builders in general have positive perceptions of Tarion in several areas. Tarion performs very strongly on the following attributes:
  - encourages builders to provide good customer service (62% strongly agree)
  - is courteous (51% strongly agree)
  - is working to reduce illegal building activity (45% strongly agree)
  - educates builders about warranty/construction matters (43% strongly agree).
- In 2020, as in the past two years, the four traits that builders most strongly associate with Tarion are:
  - acts with integrity (87% agree; 41% strongly agree)
  - trustworthy (83% agree; 38% strongly agree)
  - dependable (83% agree; 37% strongly agree)
  - accessible to builders (79% agree; 41% strongly agree).

### Builder Outreach Opportunities

**There is room to move overall satisfaction levels up, especially among Micro + Small, Medium volume and Large volume builders.** Their satisfaction with Tarion's overall performance over the last year ranges between 31%-47% extremely/very satisfied (64% of High-Rise builders are satisfied).

The research indicates the following opportunities for Tarion to increase overall satisfaction and further foster relationships with builders throughout 2021.

- **Improve communication and response times** – This is a comparatively easy change that Tarion can make to strengthen relationships. When builder comments were solicited, communication issues were a main concern and a main area of improvement that builders are seeking. Specifically, they complain that Tarion is hard to reach, doesn't answer phone calls and doesn't return calls or is slow to call back. They want Tarion to be more available and respond faster. Some suggestions for implementing changes are:
  - Ensure that **sufficient lines or operators** are available to take calls, so that callers are not left with busy or unanswered lines.



- **Move callers through the automated system** quickly by ensuring that: a) only one call is needed to connect to the automated menu, b) they can skip through instructions (i.e., they are not required to listen to the full instruction before proceeding), and c) relevant menu categories are in place that triage callers through the system as quickly and with the fewest steps possible. The more prompts and time required to move through the system, the more callers will feel under-served, especially if the end result is that they do not reach a person right away.
- **Establish goals for callback times** and evaluate staff on reaching them (e.g., voicemails must be returned within 3 hours). **Establish firm times during the initial conversation**, that are convenient for the builder, for Tarion to follow up on next steps in resolving an issue, and continue to ensure follow through on those callbacks. Have the call centre telephone system set up to **flag callback times**.
- **Continue efforts to work towards a more balanced, consistent, and fair warranty process** – It appears that Tarion may have made in-roads in this area: in open-ended comments, a balanced warranty process has declined over time as an item needing improvement. Still, when builder comments were solicited in 2020, Tarion’s warranty/conciliation process continues to be cited as a top concern and a top area of improvement. Further, *does a good job resolving warranty disputes* and *makes fair and impartial decisions* are among the lowest-rated attributes in a given list (30% of builders disagree that both statements describe Tarion). Specific changes that builders would like to see are: decisions that are more consistent and fairer to the builder; warranty standards that are consistent and fair (builders feel that the standards keep changing and becoming harder for them); and, simpler, easier-to-understand warranties, with clear guidelines as to what is covered (guidelines that are less subjective and left to interpretation).
- **Strengthen efforts to ensure First Call Resolution (FCR)** – One of the top concerns cited by builders when asked, was that Tarion doesn’t provide help/doesn’t answer questions. *Listens to needs/concerns of builders* is among the lowest-rated attributes in a given list (32% of builders disagree). This merits attention from Tarion since problem resolution and FCR are areas that have consistently been shown to be key drivers of satisfaction with contacts/calls to a service provider. That is, satisfaction with the contact and company is much greater if problems are resolved on the customer’s first call to the company. Satisfaction declines with the difficulty/number of contacts required to have the issue resolved. There are a number of ways to facilitate FCR such as: **empowering telephone staff** to resolve builder issues in relatively straightforward, standardized areas (e.g., issuing credits, removing late fees, scheduling work), having staff offer to **transfer the call to a supervisor or a specialist** for resolution when they have difficulty resolving an issue on the first call (e.g., transferring bill problems to the accounting department), **managing expectations** when delays in problem resolution are anticipated by informing builders of how long the delay will be and the reasons for it, and **implementing a triage system** for prioritizing trouble calls that need to be dealt with more quickly.
- **Work towards being transparent and accountable** – As in 2019, these two interrelated attributes are among the lowest-ranking traits associated with Tarion, from a given list.

- **Advocate for builders on their current key challenges** – Specifically on their primary issues of the:
  - availability of skilled labour/tradespeople
  - increasing home or land costs and the impact on building budgets, and
  - impact of the COVID-19 pandemic – especially in terms of materials shortages, even greater skilled labour shortages, and fewer workers allowed on-site due to physical distancing guidelines.
- **Consider flexible fee schedules during the COVID-19 crisis** – Costs/fees are also a top concern and area of improvement suggested by builders. While lower fees may not be feasible on an ongoing basis, consideration should be given to more flexible terms while builders are facing difficulty during the pandemic lockdowns (e.g., extending payment due dates, lifting interest charges and penalties, etc.).

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

## Detailed Findings

This report is divided into six broad sections. The first and second sections explore the builders' outlook for the new residential construction market and synthesizes their perspectives on key challenges and emerging issues, including COVID-19.

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. The sixth section provides feedback on Tarion's website.

**Industry Outlook**

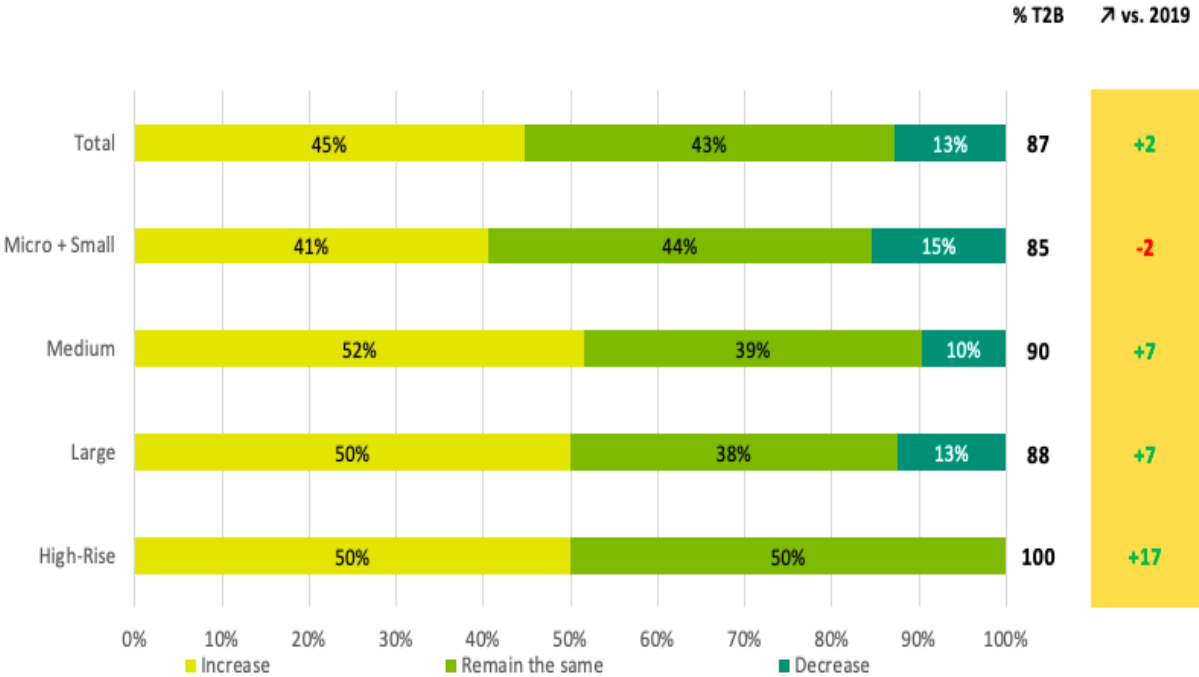
The survey began with a few short questions to help set builders’ impressions of Tarion in the broader context of their views of what’s happening in the new residential construction market overall and their own companies.

**New Residential Building Activity – Company Outlook**

Overall, the vast majority of respondents are optimistic about their own companies’ prospects. That is, 87% anticipate that their new residential building activity will increase or remain the same in the next 12 months, about the same level of optimism as last year.

Almost half of builders (45%) are predicting an *increase* in activity and this is consistent across builder types.

High-Rise builders show a significant increase in optimism this year – those reporting that they expect their activity to increase or at least remain steady has jumped 17%.



Source: C2. Also in the next 12 months, would you say [YOUR] new residential building activity will increase, remain the same, or decrease? (N=245)

## 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 2020, the **availability of skilled labour/tradespeople** continues to be among the biggest challenges, as it has been since 2016. However, two other issues have increased significantly in importance since 2019, also emerging as major challenges this year:

- **Increasing home or land costs/staying under budget**
- **The impact of the pandemic.**

**These are the three main issues or challenges that Tarion should be aware of as it creates strategies to strengthen relationships with builders.** In 2020, other items that have been challenges in the past have declined significantly in importance, in light of the increasing home/land costs and the pandemic. Specifically, builders are less likely to see the following as challenges this year than they were in previous years:

- Finding land to build on/acquisition/development
- Economy/recession/consumer confidence/market conditions
- Government regulation/permit/fees/demands.

Biggest Change	2020 %	2019 %	2018 %	2017 %	2016 %	2015 %
Availability of skilled labour/tradespeople	21 ▼	31	23	31	31	14
Increasing home/land costs/staying under budget	16 ▲	6	4	4	6	10
Pandemic impact (new)	10 ▲	-	-	-	-	-
Meeting deadlines/Closing on time	6	1	3	4	-	-
Finding land to build on/acquisition/development	5 ▼	14	11	19	14	13
Economy/recession/consumer confidence/market conditions	5 ▼	13	26	16	13	11
Government regulation/permit/fees/demands	4 ▼	10	9	9	12	9
Financing/financial challenges	2	5	10	8	2	5
Weather/Bad weather slows down work	-	1	2	2	-	-
Non-registered builders/Too much competition	-	-	1	1	-	-
Sales/marketing/finding and qualifying buyers	-	-	-	-	-	6

Source: C3. What would you say is the ONE big challenge facing your company over the next 12 months? (N=245)

▲ Statistically significant increase

▼ Statistically significant decrease

## Impact of COVID-19

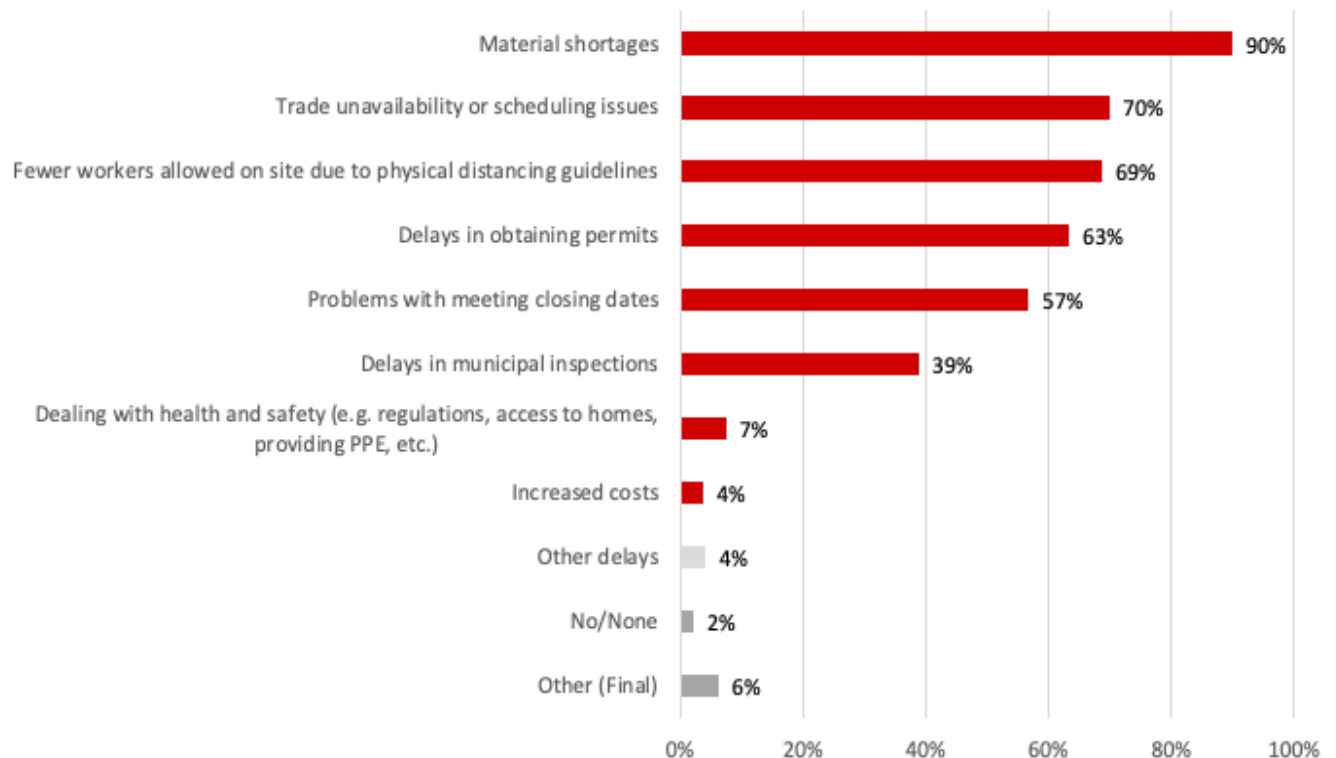
The 2020 survey of builders examined the impact of COVID-19 on their businesses.

Builders were asked if they experienced any issues from a given list. Virtually all the builders responding to the survey (98%) have experienced at least one of the issues listed. Most have experienced multiple issues.

The most common issue, experienced by almost all builders is **materials shortages** (90% of builders). This is followed by **personnel issues**: 7-in-10 respondents report problems with **trade unavailability/scheduling** or **fewer workers** being allowed on site due to physical distancing guidelines.

Delays in municipal inspections is the least of the problems listed, experienced by 39% of respondents.

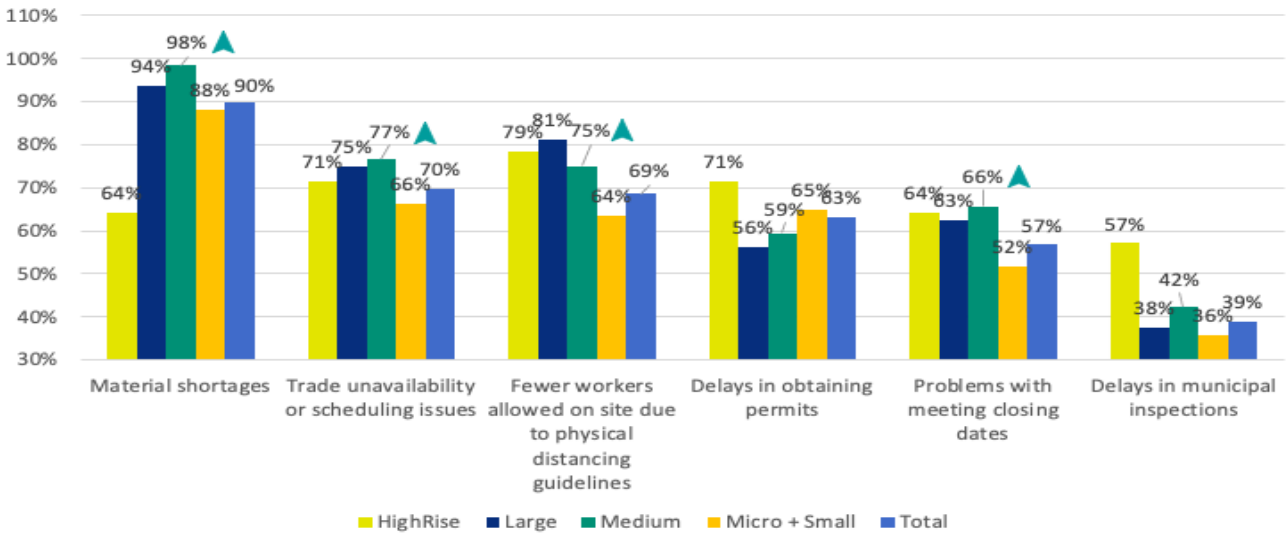
Other issues mentioned spontaneously by builders involve health and safety regulations (access to homes, PPE, etc.), increased costs and other delays.



**Source: C1\_New.** To begin, we have a couple of questions about how the COVID-19 outbreak has affected your business. Is your business experiencing any of the following issues? (check all that apply) (N=245)

Generally, Micro + Small volume builders are less likely to have experienced most of these problems than Medium volume builders and (directionally) Large volume and High-Rise builders. Specifically, Micro + Small builders are less likely to have experienced materials shortages, personnel issues and problems with meeting closing dates.

High-Rise builders are *less* likely than other builders to have had issues with materials shortages, and *more* likely to have experienced delays from municipalities, both in obtaining permits and in municipal inspections.



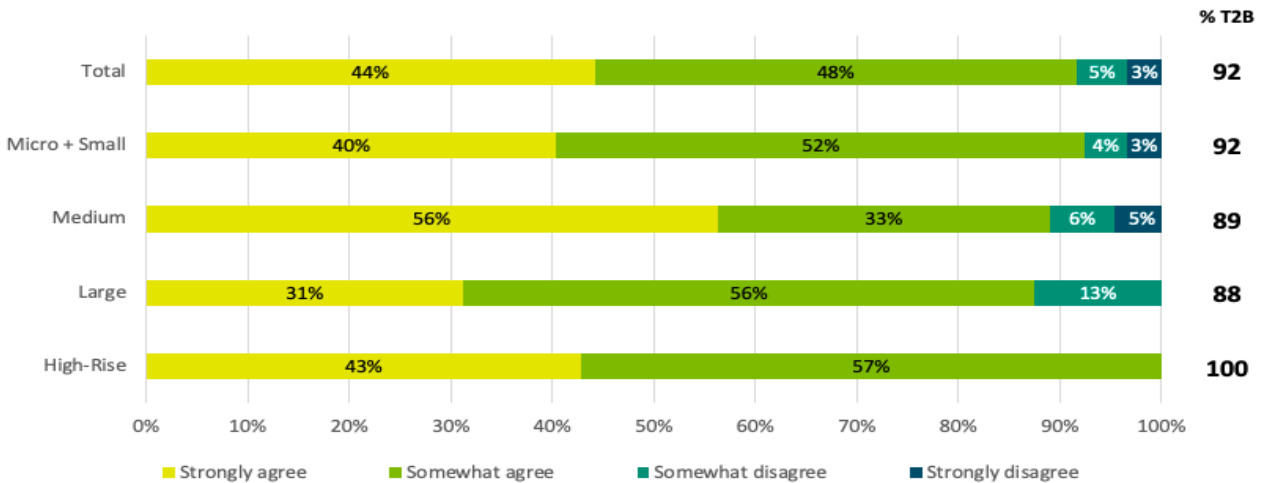
Source: C1. To begin, we have a couple of questions about the COVID-19 outbreak has affected your business. Is your business experiencing any of the following issues? (check all that apply) (N=245)

▲ Statistically significant increase versus Micro + Small volume builders

## Reactions to Tarion's Response to COVID-19

Builders agree that the measures that Tarion have taken in response to COVID-19 are appropriate. Overall, 92% of builders agree with Tarion's initiatives. More tellingly, 44% *strongly* agree – a robust response.

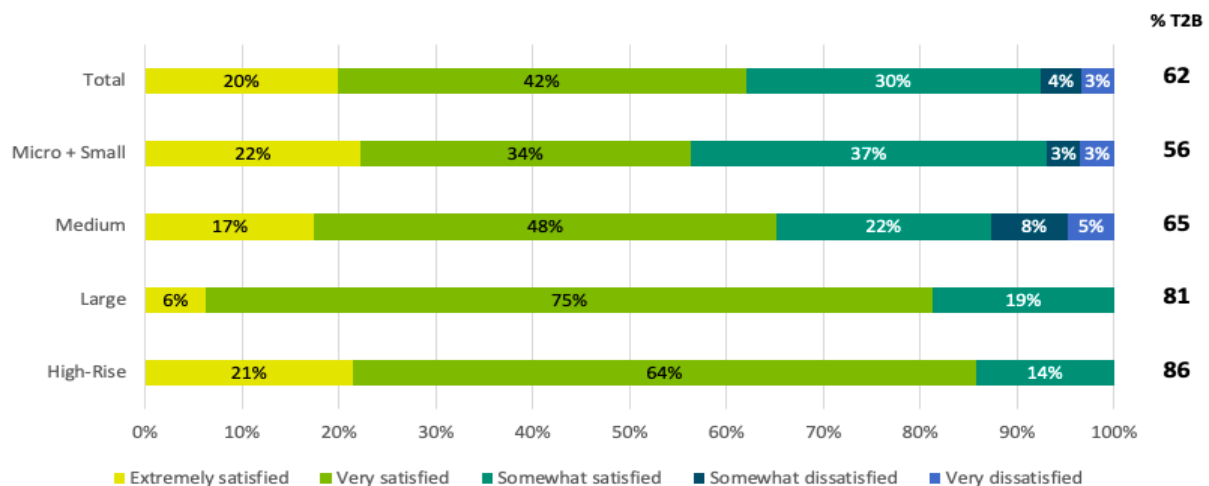
Medium volume builders are most likely to agree with Tarion's response (56% strongly agree).



Source: QD2B\_New. To what extent do you agree or disagree the measures that Tarion took in response to COVID-19 (e.g. pausing warranty timelines and repair periods, stopping in-person inspections) were appropriate? (N=245)

Overall, about two-thirds of builders (62%) are satisfied with how Tarion has kept them informed of its COVID-19 measures and their impact on the industry.

Large volume and High-Rise builders are most satisfied with Tarion's communications (81% and 86% extremely/very satisfied), and Micro + Small volume builders appear to be the least satisfied (56%).



Source: QD1B\_New. How satisfied were you with how Tarion kept you informed of their COVID-19 measures and how they might affect your business and your homeowners? (N=245)

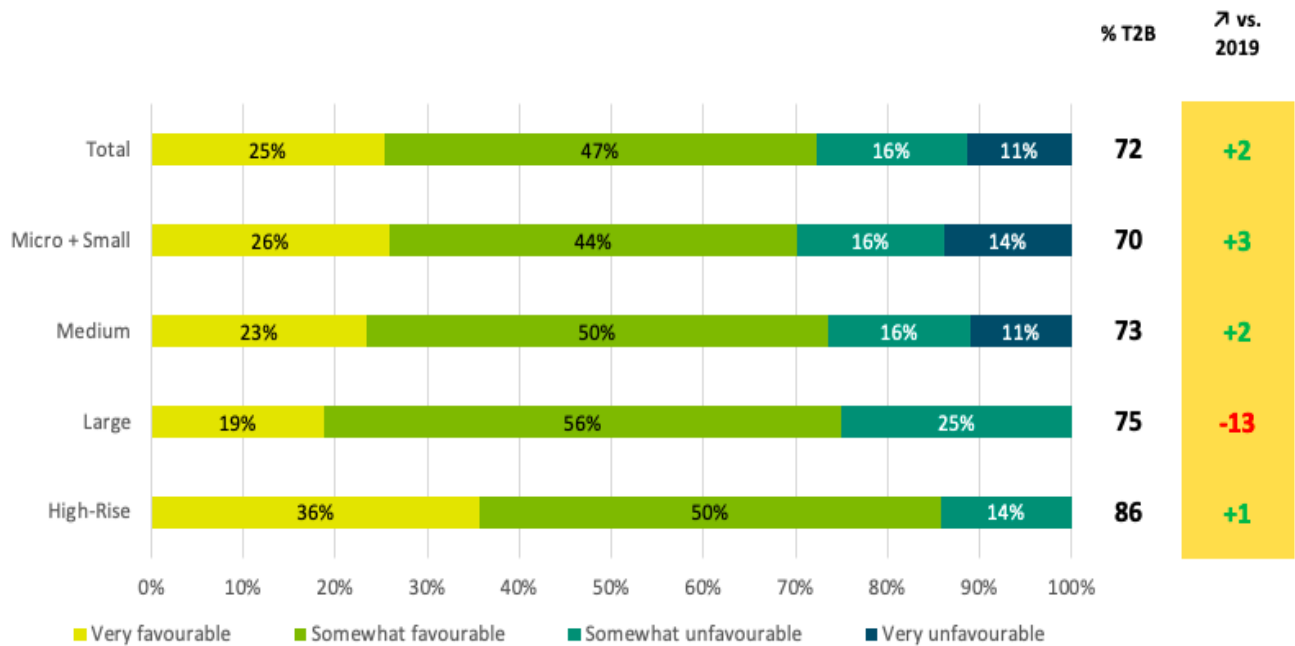


## Builders' Overall Impression of Tarion

### Overall Impression of Tarion – Based on Personal Experience

In 2019, builders' personal opinions of Tarion declined by 11% overall from the previous year. In 2020, these ratings have remained relatively stable (increasing 2% over the year). In total, 7-in-10 respondents have favourable impression of Tarion and this is consistent across most builders (the 14 High-Rise builders give Tarion higher ratings).

There is room to strengthen perceptions of builders by moving the *very favourable* score: overall 1-in-4 builders have *very favourable* impressions of Tarion.



Source: QD1A. Now onto the Tarion questions... Based on your own experiences with TARION, would you say your opinion of the organization is...? (N=245)

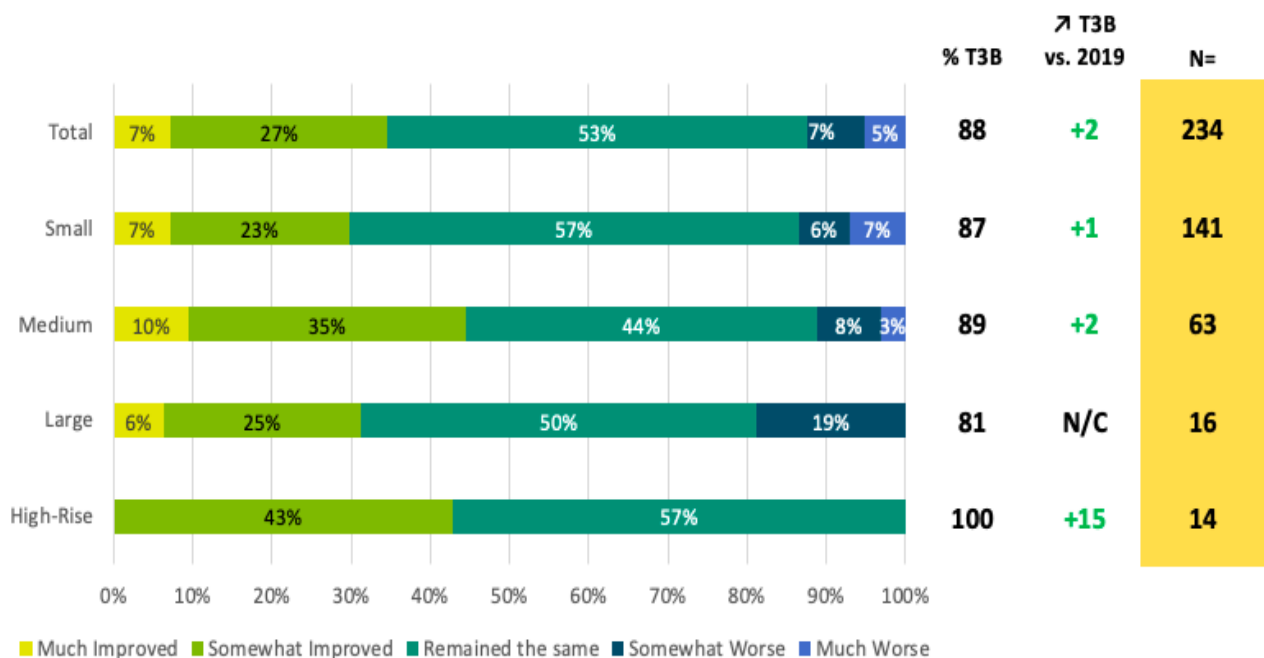
## Commitment to Customer Service

In 2019, builders' perceptions of Tarion's commitment to customer service declined by 10% overall (that is, there was a decline in the percent of builders saying the commitment improved or remained the same). The decline was evident across most types of builders.

Perceptions have changed very little between 2019 and 2020. Despite the 2019 decline, about 9-in-10 builders continue to indicate that Tarion's commitment to customer service has improved or stayed the same (all of the 14 High-Rise builders feel this way).

Overall, 1-in-3 builders (34%) believe the Tarion's customer service has improved. Medium volume builders are more likely to have seen an improvement (45%) than Micro + Small volume builders (30%).

The sample sizes for larger builders are small and subject to more error. High-Rise builders, however, do seem to have seen an increase in commitment since 2019 and to rate Tarion's customer service even more favourably than other builders (100% say it has improved or stayed the same versus 81%-89% of other builders).



Source: F2A. Over the past two years, how has Tarion's commitment to customer service changed? Would you say it is... (N=234)

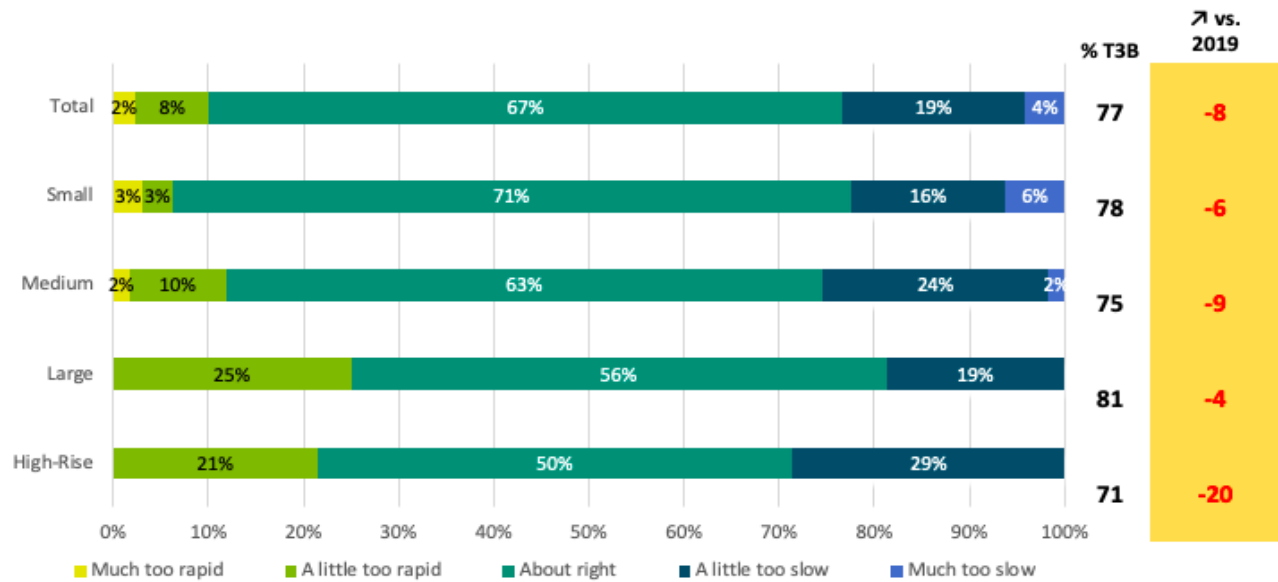
## Perceptions of Tarion's "Pace of Change"

Perceptions of the overall pace of change that Tarion has pursued as it serves its mandate have declined across all builder types since 2019.

Still, in 2020, the majority of builders (67%) feel that the pace of change has been "about right".

Large volume and High-Rise builders appear to be more likely than smaller volume builders to think that the pace is a little too rapid.

A sizeable segment of builders (23% overall) thinks that the pace has been a little/much too slow, and this is consistent across all builder types.



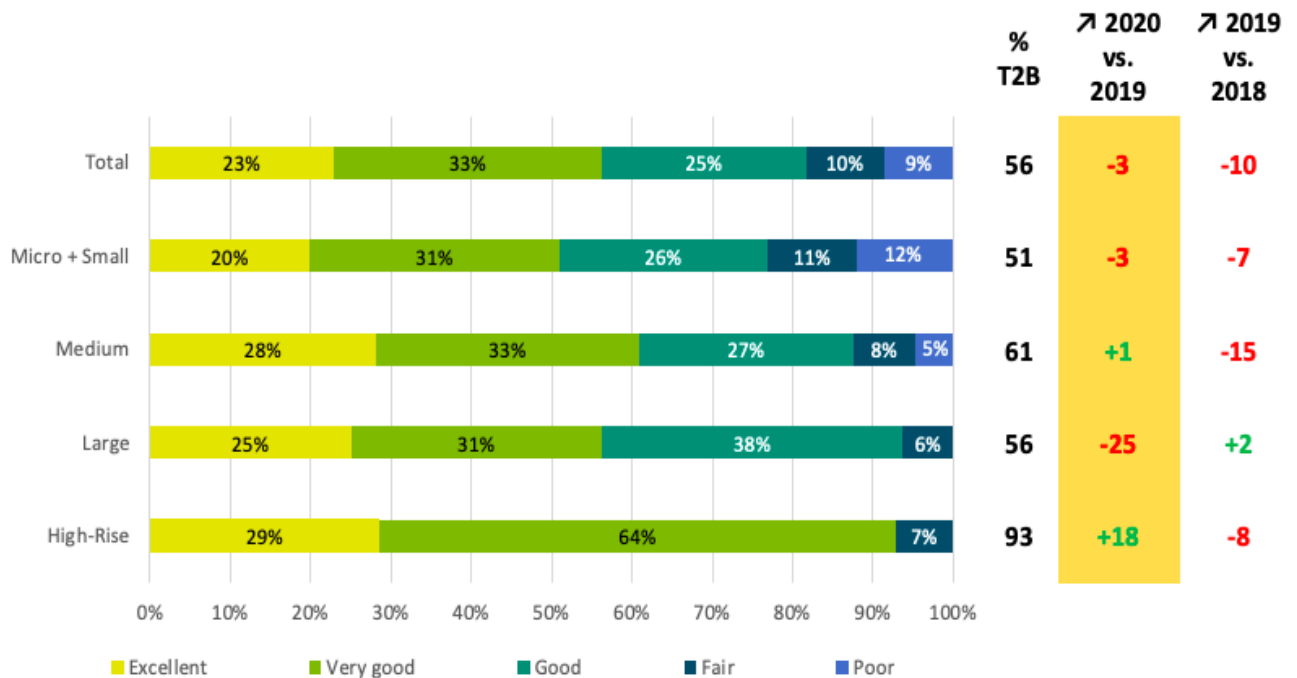
Source: F5B. Over the past year, would you say the overall pace of change that Tarion has pursued as it serves its mandate has been... (N=245)

## Strength of the Builder Relationship with Tarion

Overall, builders' views of their relationship with Tarion continue to decline. Since 2017, the percent of builders rating their relationship with Tarion as *excellent* or *very good* has decreased by 21%. In 2020, just over half of respondents (56%) feel that their overall relationship with Tarion is excellent/very good and this is consistent across most builder types.

The diminished ratings over time are mostly driven by the large number of Micro + Small and Medium volume builders: their 2020 ratings have not offset previous declines. A significant decline in ratings by Large volume builders in 2020 also impact the industry measure.

High-Rise builders seem to feel that their relationship with Tarion has strengthened since 2019, and now rate it more favourably than all other builders. There is room for Tarion to strengthen its relationship with Small, Medium and Large volume builders.



Source: QF6. Taking all things into consideration, how would you rate your overall relationship with Tarion? Would you say your relationship is...? (N=245)

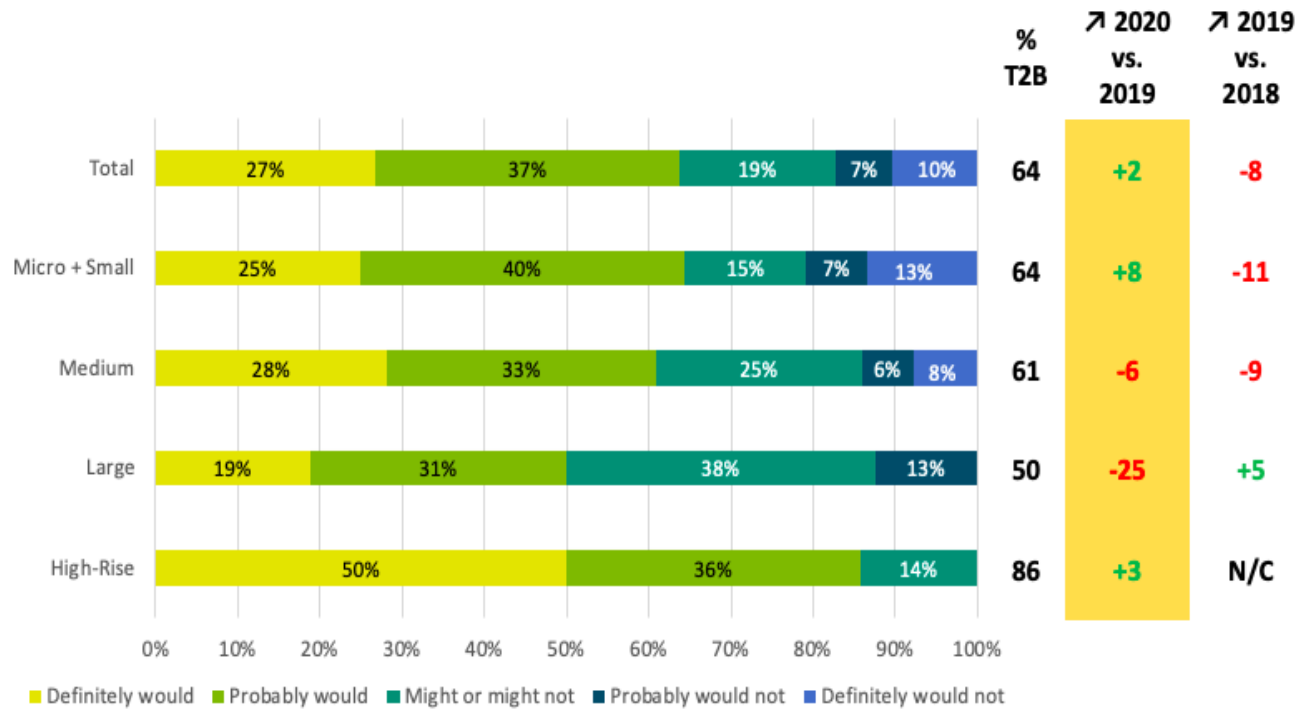
## Tarion Advocacy

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

Overall, the likelihood of advocating for Tarion stabilized in 2020, after experiencing a decline of 17% since 2017. In 2020, about 2-in-3 builders are likely to advocate for Tarion (64%), with 27% indicating that they would *definitely* say positive things about the organization.

The turn-around in ratings can be attributed to a significant increase in willingness to advocate for Tarion among Micro + Small volume builders.

Ratings among Medium volume builders continued to slide this year, dropped significantly among Large volume builders for the first time and were stable among High-Rise builders. In 2020, High-Rise builders demonstrate a greater willingness to advocate for Tarion than other builders (50% *definitely* would – a strong score).



Source: QF7. If asked by another builder, how likely would you be to say positive things about Tarion? Would you say you...? (N=243)

## Overall Performance Perceptions

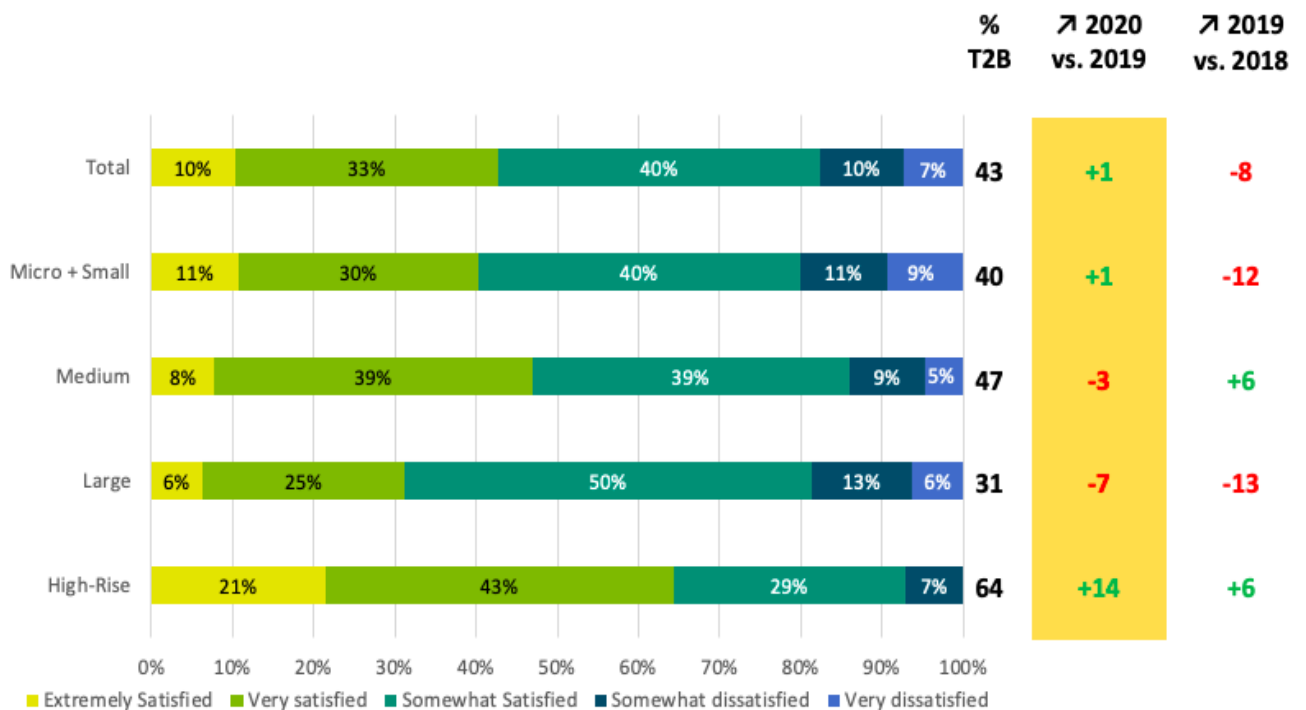
Satisfaction with Tarion’s overall performance stabilized in 2020, after having declined by 14% since 2017. In 2020, under half of all builders are *extremely or very satisfied* with Tarion’s performance (43%).

Again, the stability is most driven by the large number of Micro + Small volume builders, whose satisfaction remained at 2019 levels.

The small number of High-Rise builders also contributed to the overall change in direction of the Tarion’s performance. Satisfaction among this group continued its increase since 2017. As a result, 64% of High-Rise builders are satisfied with Tarion’s overall performance in 2020 – a higher satisfaction level than other builders.

Ratings among Large volume builders continued their steady decline, culminating in lower ratings versus other builder types.

There is room to move overall satisfaction levels up among Micro + Small, Medium volume and Large volume builders.



Source: QF1. How satisfied are you with Tarion's overall performance over the last year? Are you... (N=243)

## Specific Impressions of Tarion

Builders have positive perceptions of Tarion in several areas. Tarion performs very strongly on the following attributes:

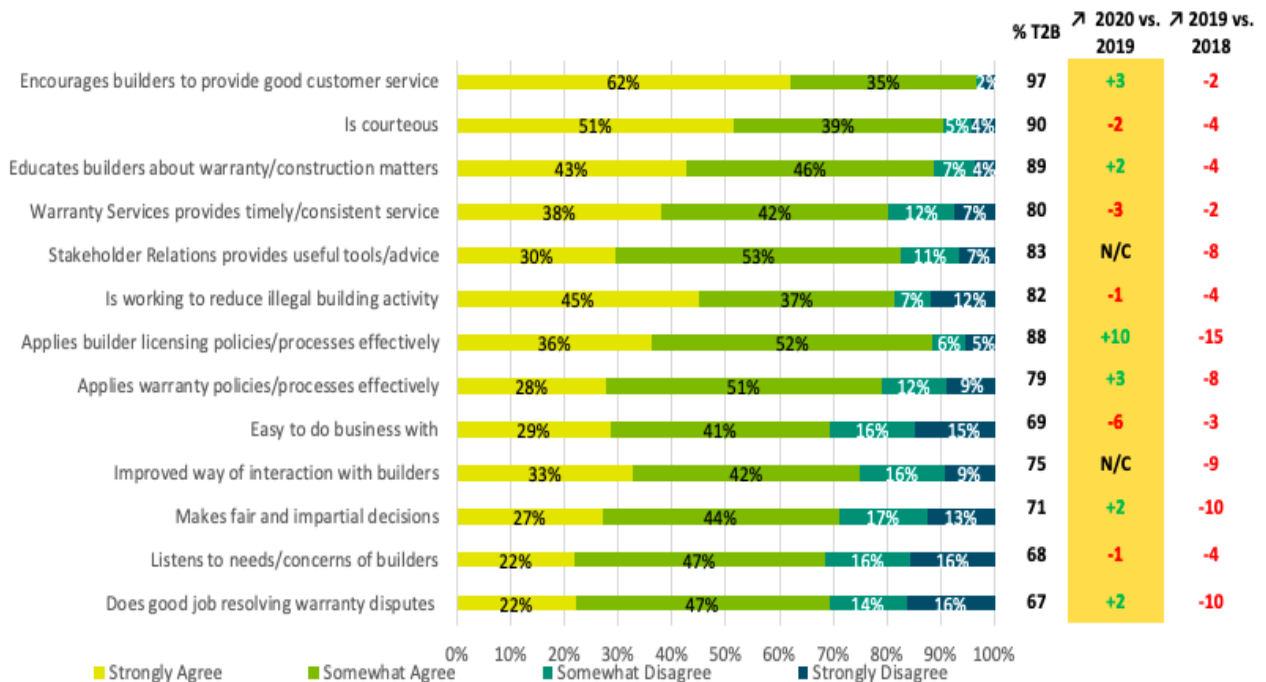
- encourages builders to provide good customer service (62% strongly agree)
- is courteous (51% strongly agree)
- is working to reduce illegal building activity (45% strongly agree)
- educates builders about warranty/construction matters (43% strongly agree).

Areas in which Tarion has the greatest opportunity for change are:

- listens to needs/concerns of builders (32% disagree)
- easy to do business with (31% disagree)
- makes fair and impartial decisions (30% disagree)
- does a good job resolving warranty disputes (30% disagree).

Ratings on specific attributes have generally stabilized in 2020, after two years of declines. *Applies builder licensing policies/processes effectively* has experienced the greatest rebound after a considerable drop in 2019.

Micro + Small volume builders seem less likely to think that *Tarion listens to the needs and concerns of builders* (62% agree, compared to Medium (73%), Large (75%) and High-Rise (86%) volume builders).



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 positive traits best describe Tarion from a given list.

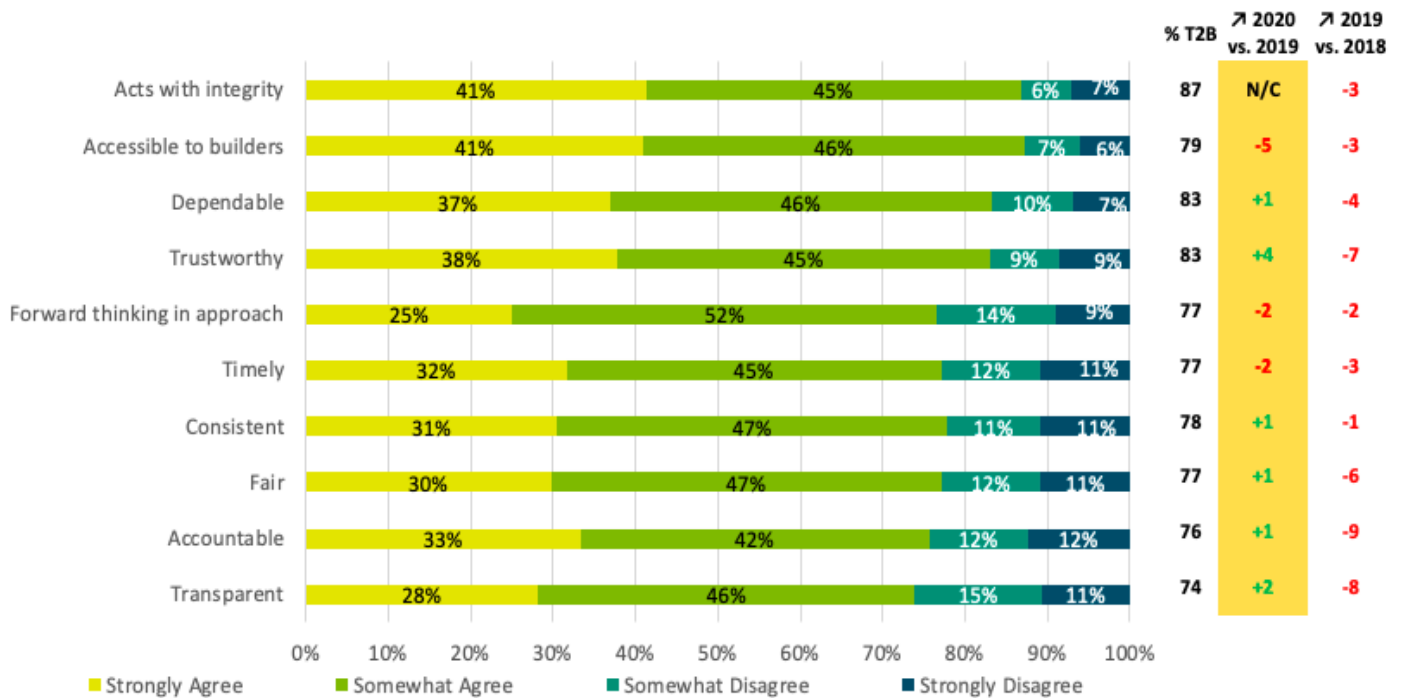
The percent of builders selecting each trait declined through 2018 and 2019 (especially 2018), and stabilized in 2020.

In 2020, as in the past two years, the four traits that builders most strongly associate with Tarion are:

- acts with integrity (87% agree; 41% strongly agree)
- trustworthy (83% agree; 38% strongly agree)
- dependable (83% agree; 37% strongly agree)
- accessible to builders (79% agree; 41% strongly agree).

As in 2019, being transparent and accountable are again the lowest-ranking attributes associated with Tarion (74% and 76% agree).

There are sizeable segments that disagree with many of these descriptors (between 1-in 4 and 1-in-5 builders). Generally, it is High-Rise builders who tend to agree most strongly that the list of traits describe Tarion; Large volume builders are least likely to agree.



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



## Builder Licensing and Home Enrolment

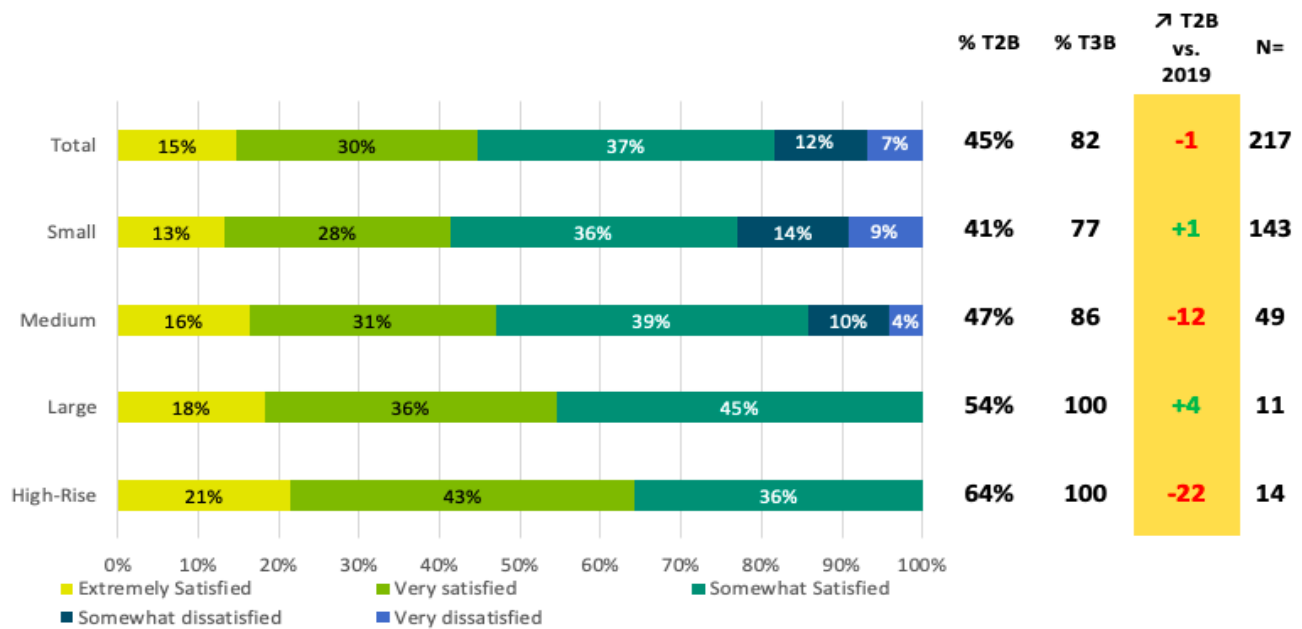
Areas of evaluation in the 2020 survey again include builders' satisfaction with Tarion's Builder Licensing and Home Enrolment processes.

### Builder Licensing Process

Overall, satisfaction with Tarion's builder licensing process is unchanged from 2019. Again, almost half of the builders (45%) are extremely/very satisfied with the process.

Satisfaction among High-Rise and Medium volume builders has dropped significantly, returning to levels more comparable with 2018. Still, High-Rise builders seem more satisfied with the process than smaller builders.

In 2019, satisfaction among Micro + Small builders declined significantly by 11% and essentially remained at that level in 2020 (41% satisfied).



Source: E1. Taking all things into consideration, how satisfied are you with Tarion's builder licensing process? Are you...? (N=217)

Directional gains in satisfaction have been achieved on several specific areas of the builder licensing process.

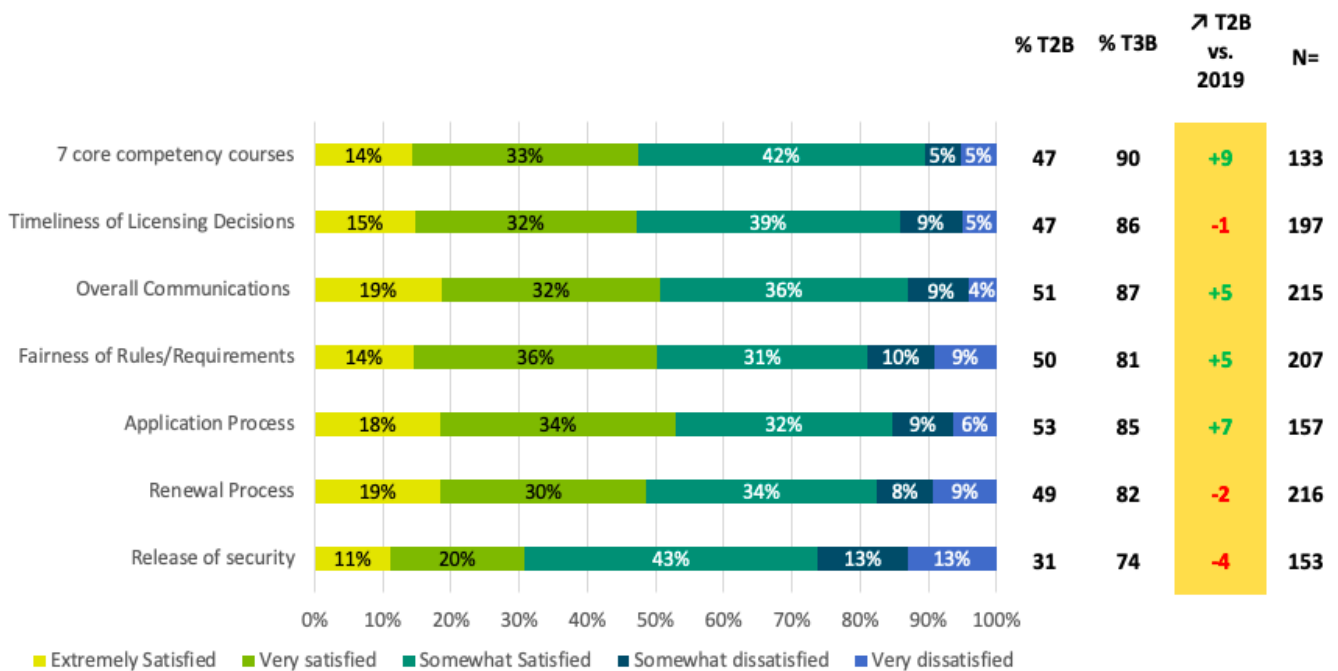
In 2020, builders are equally satisfied with almost all areas of the process: about 1-in-2 builders are extremely/very satisfied with six of the seven aspects listed.

When those who are “somewhat satisfied” are included, then scores are highest for:

- the 7-core competency courses (90% satisfied)
- overall communications from Tarion related to licensing (87%)
- timeliness of licensing decisions (86%)
- the application process for new builders (85%).

In both cases, the area of the builder licensing process that builders are least satisfied with is the *release of security* (31% extremely/very satisfied).

Medium volume builders are significantly more satisfied with the *renewal process* and *overall communications* than Micro + Small volume builders are.

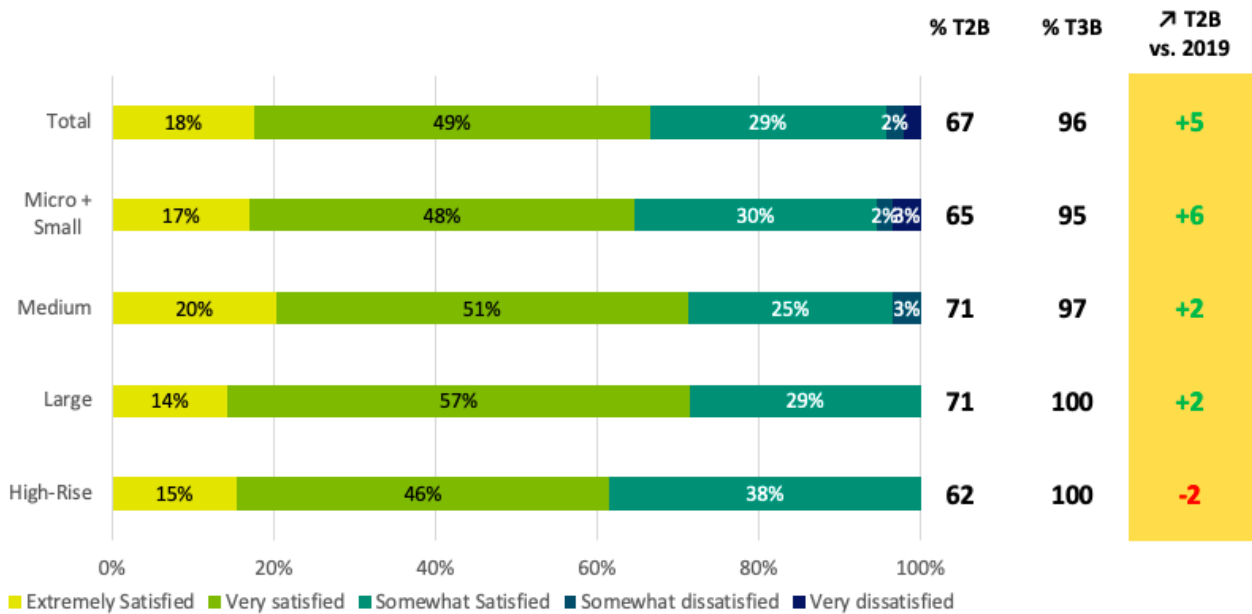


Source: E2. Thinking more specifically about Tarion's builder licensing process, how satisfied are you with ...?

## Home Enrolment Process

In 2020, satisfaction with the home enrolment process appears to have increased somewhat among Micro + Small builders from the previous year, and has remained relatively unchanged among other builders.

Overall, two-thirds of builders (67%) are extremely/very satisfied with the home enrolment process and this is consistent across all builder types.

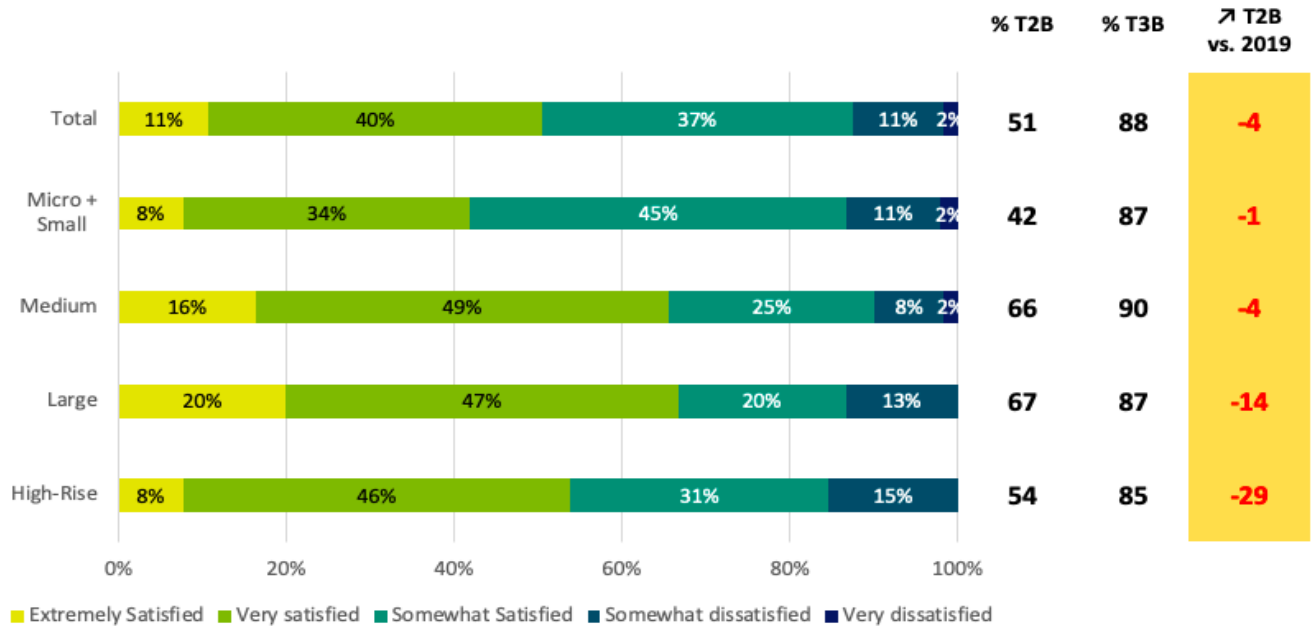


Source: E3. How satisfied are you with Tarion's home enrolment process? Are you...? (N=233)

In 2020, half of all builders (51%) are extremely/very satisfied with the functionality and usability of BuilderLink, a score that has remained fairly stable over the past two years.

Since 2019, there has been a significant decrease in satisfaction with BuilderLink among High-Rise builders, and an apparent decline among Large volume builders. As a result, satisfaction levels among these larger builders have been brought back in line with 2018 levels.

In 2020, Micro + Small builders are least satisfied with BuilderLink (42%).



Source: D8B. Overall, how satisfied are you with the functionality and usability of BuilderLink? N=232

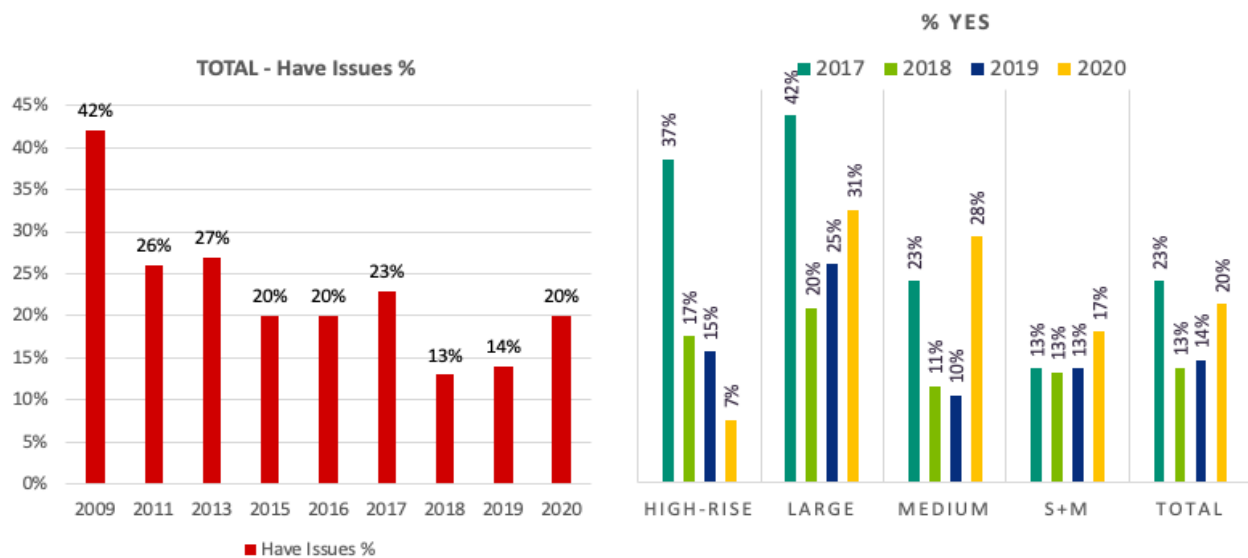
## Concerns and Builder-Driven Suggestions for Improvement

### Builders' Major Concerns / Issues with Tarion

In 2020, the proportion of builders reporting they have issues with Tarion or major concerns about changes Tarion has made in the past year increased somewhat, after hitting record lows in 2018 and 2019. In 2020, as in several previous years, 20% of builders indicate that they have issues.

Large volume builders continue to be the most likely group to have issues with Tarion or major concerns about changes made, along with Medium volume builders (31% and 28% respectively).

High-Rise builders have the fewest concerns, in a continuing trend since 2017.



Source: F3. Do you have any issues with Tarion or major concerns about changes they've made in the last year? (N=245)

The 20% of builders who expressed concerns were asked on an open-ended basis, what those issues or concerns are. The issues that they cited are the same as in 2019 and are shown below.

Major Issues / Concerns	'20 %s	'19 %s	'18 %s	'17 %s
Costs of fees/Deposits etc.	18	18	6	-
Hard to reach/Don't answer phone/Don't call back/Slow to call back	14	14	9	10
Conciliation/Warranty process is difficult for builder	14	7	23	33
Poor customer service/Don't provide help/Don't answer questions	12	18	17	14
Decisions are unfair to the builder/Inconsistent/Unbalanced	10	4	17	29
Warranty standards keep changing/Keeps getting harder for the builder	8	7	6	21
Tarion doesn't listen to builders/Ignores builder input	8	7	3	11
Online features are difficult to access/Not accessible	6	7	20	3
Warranty is unclear/Too subjective as to what is covered	6	-	20	-
Illegal builders are not dealt with adequately	-	4	-	-
Tarion solicits/Charges for conciliations	-	-	9	16

Source: F4. 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 year (2020: N=50; 2019 N=28)

## Suggested Improvements to Assist Builders

All builders were asked on an open-ended basis, what the most important improvement Tarion could make to assist them in the next year or two would be.

Their responses are very much the same as in 2019. The top suggested improvements involve:

- better communication – be more available, faster response
- a more consistent, balanced, fair warranty process
  - this has trended downward since 2017, and is now significantly less likely to be cited since then (20% to 11% in 2020)
- lower costs/fees.

Another suggestion that has trended downward since 2017, and is now significantly less likely to be cited is:

- provide more Information, up-to-date information/bulletins.

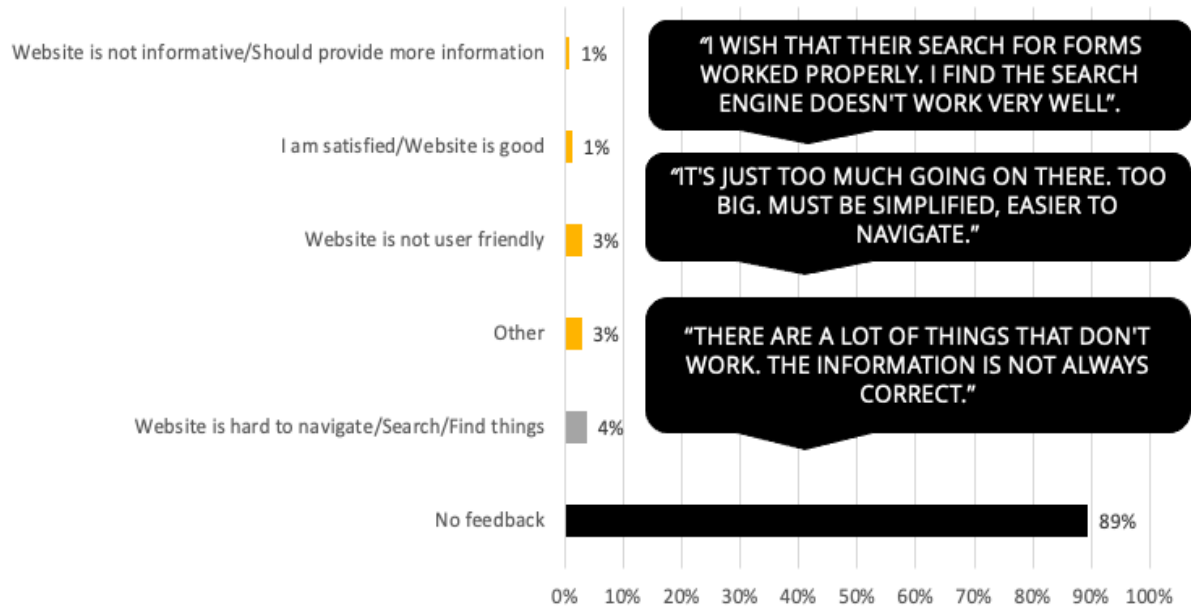
<b>Improvements to Assist Builders</b>	<b>'20 %s</b>	<b>'19 %s</b>	<b>'18 %s</b>	<b>'17 %s</b>
Communication - Be available/Respond faster	13	11	17	12
Warranty - More consistent process/More balanced/Fair decisions	11	13	18	20
Costs - Reduce costs/Fees	10	3	7	7
Warranty - Make it less complex/Easier to understand	7	8	10	10
Communication - More information/Up-to-date information/Bulletins	5	9	11	15
Website - Easier to user/More user-friendly/Improve it	5	7	8	4
Communication - Be more knowledgeable/Listen/Answer questions	4	5	12	9
Builders - Crack down on illegal/Non-licensed builders	3	4	4	4
Website - Easier to navigate/Find things/Better organization	2	1	3	5
Process - Simplify it/More Efficient/Be Fair	-	14	-	-
Builders - Regulate/Monitor/Rate/Enforce standards	-	-	4	4

Source: F5A. From your perspective, what is the most important improvement Tarion could make to assist builders in the next year or two? (N=245)

### Tarion.com Website Feedback

When builders were asked to provide feedback about the tarion.com public website, the majority did not provide any comments (89%).

The few who did provide feedback mainly stated that the site is difficult to navigate/not user-friendly.



**APPENDIX –  
2020 Builder Impressions Survey**

**Tarion Warranty Corporation  
Builder Impressions Survey  
2020-2021**

Forum Research Inc.

3 October 2020

**Small N=100  
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. 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	→ <b>CONTINUE</b>
02	Yes, will do survey later	→ <b>RESCHEDULE</b>
T2	No	→ <b>THANK AND TERMINATE</b>

**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. 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. 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)

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

**Section 2 – SURVEY**

**C. Market Experiences and COVID-19**

C1. To begin, we have a couple of questions about how the COVID-19 outbreak has affected your business.

Is your business experiencing any of the following issues? (check all that apply)

- Fewer workers allowed on site due to physical distancing guidelines
- Trade unavailability or scheduling issues
- Material shortages
- Delays in obtaining permits
- Delays in municipal inspections
- Problems with meeting closing dates
- Other – please specify \_\_\_\_\_

C2. 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]**

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**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) How satisfied were you with how Tarion kept you informed of their COVID-19 measures and how they might affect your business and your homeowners **[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]**

D2. To what extent do you agree or disagree the measures that Tarion took in response to COVID-19 (e.g., pausing warranty timelines and repair periods, stopping in-person inspections) were appropriate?

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

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]**

D4\_new. What is your general comfort level with interacting with Tarion's digital tools or platforms (e.g., mobile apps, online payments, BuilderLink etc.)

- 5 Extremely comfortable
- 4 Very comfortable
- 3 Somewhat comfortable
- 2 Somewhat uncomfortable
- 1 Very uncomfortable
  
- 9 Don't know/not stated **[DO NOT READ]**

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 **[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

D8a. Have you or someone in your company used BuilderLink?

- 1 Yes
- 2 No

If yes, 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]**

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]**

D8c. Is there an activity or task that you would like to be able to do on BuilderLink that currently isn't possible? **[PROBE, CODE ALL MENTIONS]**

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## 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 in 2020? 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 year? 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 year, 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]**

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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]**

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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.

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9 No feedback

## 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)