



2020 New Home Owner Satisfaction Survey
Understanding New Homeowner Impressions of Tarion

Executive Summary and Detailed Findings

Prepared for: Tarion

**Year 1 Possessions
10 May 2021**

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Introduction

This report highlights the results from a survey of new homeowners who recently purchased and took possession of a newly constructed dwelling in Ontario (“homeowners”). The report is designed to help Tarion understand trends and identify the challenges and opportunities of maintaining and improving service to homeowners.

Why the Need for Research?

The primary goal of this research is to understand homeowners’ perceptions of Tarion’s service and image, among various other factors. 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 homeowner communications and service improvement strategies.

Research Approach

Forum Research used a questionnaire provided by Tarion to survey new homeowners.

In 2020, the research approach deployed multiple invitation methods requesting homeowners to complete our survey online. In all instances where Tarion had the homeowner’s email address on file, Forum sent the survey invitation by email. High-Rise purchasers for whom we did not have an email address on file received a full mail package containing a paper copy of the survey, and a postage paid return envelope. Freehold purchasers without email addresses received a postcard invitation. A series of reminders were sent to non-responders including email messages, postcards by mail, and telephone (Interactive Voice Response) messages. Paper copies of the survey were mailed to homeowners in response to requests callers made to a toll-free line available to survey invitees.

All consumers in Ontario who took possession of a new home between October 1, 2019 and September 30, 2020 were invited to participate. In total, 48,035 survey invitations were sent to new homeowners who purchased from a builder with one or more Freehold or High-Rise possessions in the period of the study. These homeowners represent the entire universe of all new home possessions in the period.

Homeowners responded online by visiting a survey website provided in the invitation. The survey was offered in English, French, Mandarin, Punjabi, and Farsi.

The survey had two parts. The first part asked questions about the homeowners’ experiences with Tarion and the second part asked questions about their experiences with their new home builders. Only the results of the first part are covered in this report.

The average survey length was 21 minutes. The 2020 questionnaire was reduced by several questions from the following categories and the survey length was decreased by an average of 2 minutes from 2019.

- 26 Tarion-specific questions removed,
- 7 Builder-specific questions removed and,
- 11 Demographic questions removed.

All homeowners received a personal identification number to permit access to the online survey and to prevent duplicate responses. Incentives (draws for one of five prizes of \$500 electronic gift cards) were offered to encourage participation. Tarion agreed not to discuss the contents of the survey with homeowners at any time while it was in the field.

Survey invitations were sent October 23, 2020 and the published deadline to complete the survey was January 10th, 2021. Forum Research accepted and tabulated all surveys received on or before January 10th, 2021.

In total, 6,679 completed surveys were received. The breakdown of the 6,679 completed surveys consisted of the following:

- 1,944 purchased a High-Rise condominium (“High-Rise Homeowners”)
- 2,142 purchased a home from a Large Volume builder (“Large Homeowners” i.e., bought from a builder that had 100+ possessions during the previous 12 months)
- 1,629 purchased a home from a Medium Volume builder (“Medium Homeowners” i.e., bought from a builder that had 21-99 possessions during the previous 12 months)
- 677 purchased a home from a Small Volume builder (“Small Homeowners” i.e., bought from a builder that had 5-20 possessions during the previous 12 months)
- 287 purchased a home from a “Micro” builder (i.e., bought from a builder that had 1-4 Freehold or Low-rise condo possessions).

The survey response rate was 14%, a decline of 5% from the previous year.

Results are accurate to within +/- 1.12%, 19 times in 20. Most measures are tracked against a survey of 8,500 homeowners completed during the same period of 2019, which had similar statistical accuracy. Results for sub-samples by builder segment have a somewhat higher margin of error, as do questions asked among only a subset of homeowners.

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

Note: Some percentages in this report may not add up to their individual parts due to rounding. Total percentages (e.g., % favourable) do accurately reflect their unrounded parts. “N/C” denotes no change.

Unless noted otherwise, all percentage comments in this report are with regards to the top two categories (T2B, e.g. very satisfied + somewhat satisfied). Percentage comments in this report with regard to the bottom two categories will be referred to as BTM2 (e.g., somewhat dissatisfied + very dissatisfied).

Sample Size (n=) on Likert scales removes “Don’t Know/Prefer Not To Say/Refused/Unknown/Not Applicable” responses from the sample base to calculate more accurate T2B and BTM2 percentages.

Executive Summary

This Executive Summary highlights the results from Tarion's 2020 New Home Owner Satisfaction Survey. Detailed descriptions of the findings are provided in subsequent sections. A copy of the questionnaire is appended at the end of this report.

Drivers of New Homeowner Satisfaction with Tarion

An analysis was conducted to determine the service attributes included in this year's survey, that most drive homeowner satisfaction with Tarion (i.e., likelihood of willing to advocate for/say positive things about Tarion). The following factors are important drivers of satisfaction, and areas in which Tarion's performance is comparatively less strong than in other areas.

Important Drivers of Homeowner Satisfaction with Tarion

Tarion's Performance is Weaker Areas of Opportunity for Tarion
<ul style="list-style-type: none">• Gives new home buyers confidence in the home buying experience (82%)• Satisfaction with interactions with Tarion (60%)• Helpfulness of the Construction Performance Guidelines (51%)

As indicated in the chart above, the items in red font are service attributes that homeowners are comparatively less satisfied with, and which therefore should be the focus for improvement initiatives by Tarion.

It should be noted that the Tarion's KPI are not Key Satisfaction Drivers.

Homeowner Impressions of Tarion

In the 2020 survey, several measures of Tarion's activities were eliminated. The following is a summary of those attributes that were included.

- In general, in 2019, opinions of Tarion decreased on many service attributes compared to the previous year. In 2020, impressions rebounded in almost all areas, to 2018 levels.
- After a slight decrease in 2019, overall impressions of Tarion have rebounded and remain positive among new homeowners.
 - The vast majority of Year 1 homeowners (85%) have a *favourable impression* of Tarion, and more tellingly, 41% have a *very favourable impression* – a strong score
 - Over 2 in 3 homeowners (71%) are *willing to advocate* for/say positive things about Tarion.

- Tarion’s Corporate **Key Performance Indicator (KPI)** used for measuring Homeowner Satisfaction is calculated using satisfaction scores based on three criteria: Tarion’s *accessibility, listening to the needs and concerns of new homeowners, and being easy to do business with*.
 - In 2020, Tarion’s KPI has rebounded to 83%, after dipping to 81% in 2019. At 83%, the KPI meets the SOI goal (82%).
 - Tarion performs well on the three specific KPIs. Over 8-in-10 homeowners agree that Tarion delivers on *being accessible* (88%), *being easy to do business with* (82%), and *listening to the needs and concerns of new homeowners* (81%). More tellingly, about 4-in-10 homeowners *strongly* agree that Tarion is accessible (45%), easy to do business with (37%) and listens to needs and concerns (37%) – all strong performance scores.
 - *Accessibility* continues to be Tarion’s top strength and this remains consistent year after year.
 - After a significant decline in 2019, the rating for *being easy to do business with* rebounded in 2020, bringing it back to the same levels seen since 2016.
 - After a significant decline in 2019, Tarion’s performance in terms of *listening to the needs of new homeowners* has also rebounded to 2018 levels – a level not otherwise seen since 2012.
- Similarly, in 2019, opinions of Tarion decreased on all other service attributes compared to the previous year. In 2020, all ratings rebounded significantly to 2018 levels.
 - In 2020, Tarion performs well on all broad aspects of helping homeowners with the warranty process. The vast majority of new homeowners agree that Tarion *helps homeowners understand their warranty rights and obligations* (83%) and *ensures fairness in overseeing the warranty rights and obligations of new home buyers and builders* (81%). Again, more tellingly, 4-in-10 homeowners *strongly* agree with each statement – strong performance scores.
 - *Making sure that new home builders fulfill their warranty obligations* achieves somewhat lower ratings overall than other attributes, but strong ratings nonetheless (79% agree, 40% strongly agree).
 - About 8-in-10 homeowners also agree that Tarion *gives buyers confidence in the home buying experience* (83%) and that it is *open and transparent in its dealings with new homeowners and builders* (82%): 4-in-10 homeowners *strongly* agree with each statement.

Contact with Tarion

- In 2020, 86% of Year 1 homeowners report some contact with Tarion by telephone, e-mail/mail, visiting the website, registering for “MyHome” or downloading the MyHome Planner app, having a claim or conciliation inspection, or submitting a statutory warranty service form.
 - In 2020, as in previous years, the main points of contact that new homeowners had with Tarion were the *MyHome portal* (58%), followed by the *Tarion website* and the *statutory warranty form* (53% and 52% respectively). This year, 13% of homeowners had downloaded Tarion’s MyHome Planner app.
 - Use of the *MyHome portal* and the *Tarion website* has steadily grown since 2018. The *Tarion MyHome Planner app* has also seen steady increases in use since measurement of this service began in 2017. Use of other vehicles has remained relatively constant since 2017.
- Among homeowners who reported contact with Tarion through these communications vehicles, satisfaction with their overall interactions seemed to rebound in 2020 after a decline the previous year. Still, in 2020, 60% are extremely or very satisfied with their interactions. **Further improvement in this area would positively impact overall satisfaction with Tarion. Improvements could be achieved by enhancing the ease of use of Tarion’s communications materials – particularly MyHome, the HIP and the statutory warranty form – and the usefulness of its Construction Performance Guidelines.**
 - Overall, *Tarion’s website*, the *Tarion Homeowner Information Package (HIP)*, the *MyHome online service*, and the *statutory warranty form* show strong performance. In each case, the vast majority of respondents (84%-88%) agree that the vehicles are easy to use and understand. However, just over one-third (35%-38%) *strongly* agree, suggesting that there is room to enhance the ease of use of these vehicles.
 - As in past years, The *Tarion website* continues to be the area that is perceived to be the easiest to use and understand (88% agree, 37% strongly agree) – therefore, it is less of a priority than the other three areas.
 - One-third of homeowners (35%) used or referenced Tarion’s *Construction Performance Guidelines* in 2020, the same proportion as in the previous two years (34% in 2019). Of those who have used the guidelines, about half (51%) find it extremely or very helpful overall, a rebound from the previous year to 2018 levels. Still, this is a service attribute that homeowners are comparatively less satisfied with, and which therefore provides an opportunity for improvement by Tarion.

Differences Among Homeowner Possession Groups

The main differences in impressions of Tarion between homeowner possession groups, based on the service attributes measured this year, are as follows.

- Small Homeowners, especially Micro Homeowners, are less satisfied with their overall interactions with Tarion than owners of larger volume categories, and are least willing to advocate for it. Specifically, Smaller Homeowners:
 - are least likely to feel that Tarion *helps new homeowners understand their warranty rights and obligations*. (Generally, Micro Homeowners are less likely than other owners to agree that Tarion delivers on the Key Performance indicators).
 - are less likely than other owners to have had contact with Tarion through any of the channels measured (MyHome, the website, statutory warranty form, etc.): among those who have contacted Tarion, Micro Homeowners are least satisfied with their interactions.
 - find all of Tarion’s communications materials (i.e., the website, MyHome, HIP, statutory warranty form) more difficult to use and understand than Larger Homeowners do – especially Micro Homeowners (among those who did use them).
- The rebound this year in the overall impressions score for Tarion – and in the ratings of the CPG – has mainly been driven by Medium and Large Homeowners.
- High-Rise and Large Homeowners are more likely to have used virtually all the contact vehicles measured (MyHome, the website, statutory warranty form, etc.), followed by Medium Homeowners. Large Homeowners who have contacted Tarion, are slightly more satisfied with their overall interactions than those in other builder categories. Still, there is an opportunity to move their satisfaction scores up.

The Impact of COVID-19 on New Homeowners

- New homeowners indicate that the greatest impact that COVID-19 has had on their new homes (from a given list of possible impacts) is *repair delays*, by far (67% of homeowners). This is followed by *closing/occupancy delays* and *pre-delivery inspection disruptions* (each experienced by 1-in-3 owners).
- New homeowners are generally very satisfied with the measures that Tarion has taken in response to COVID-19. The vast majority (84%-88%) agree that the actions taken by Tarion are *appropriate*, and that Tarion has done a good job of *keeping them informed* of COVID-19 measures (better than the builders have), and of implementing *health and safety precautions* that have made them feel comfortable about having representatives enter their homes. More tellingly, half of homeowners *strongly* agree with each of these statements – robust performance scores.

- Generally, all of the COVID-related disruptions are more likely felt by High-Rise and Large Homeowners, and also Medium Homeowners in some cases. The type of disruption varies by builder category.
 - Generally, High-Rise, Large and Medium Homeowners rate Tarion's and their builders' responses significantly more favourably than Small and (especially) Micro Homeowners.

The Builder Experience

- In 2020, Small Homeowners, especially Micro Homeowners, tend to be the most satisfied with most aspects of the builder process (despite being the ones least satisfied with Tarion), and High-Rise owners are consistently the least satisfied. This is a trend that remains consistent year after year. Similarly, since 2019, homeowners' opinions of builders have generally improved across all categories except High-Rise builders. Impressions of High-Rise builders have declined on almost every service attribute.
- As seen each year, the homeowner's experience with the builder has a direct and significant impact on their impressions of Tarion. When builders fall below expectations, homeowners are more likely to have an unfavourable view of Tarion.
- An analysis was conducted to determine the service attributes that most drive homeowner satisfaction with builders (i.e., likelihood of recommending them). The following factors are important drivers of satisfaction, and areas in which builders perform comparatively less well and may be negatively impacting perceptions of Tarion. These present leverage points and advocacy opportunities for Tarion.

Builders Performance is Weaker - Areas of Opportunity for Tarion

- **Overall communication effectiveness (49% extremely/very satisfied)**
- **Ability to instill confidence in work and service (48%)**
- **Ability to follow through on commitments (48%)**
- **Overall quality of service and repairs (48%)**
- **Customer service AFTER moving in (46%)**
- **Timeliness of response to service and repair requests (44%)**
- **Experience with new home and builder expectations (29%)**

Builder Outreach Opportunities

The opportunities for Tarion to further foster relationships with homeowners through 2020 are summarized below.

- Tarion’s service attributes that homeowners are comparatively less satisfied with, and which therefore should be the focus for improvement initiatives by Tarion, include:
 - Giving new home buyers confidence in the home buying experience
 - Helpfulness of the Construction Performance Guidelines
 - About half of homeowners (51%) find the CPG extremely/very helpful – there is room to increase this score
 - Satisfaction with interactions with Tarion
 - Satisfaction with interactions with Tarion can be enhanced by making the *Tarion Homeowner Information Package (HIP)*, the *MyHome online service*, and the *statutory warranty form* easier to use and understand. Though they show strong performance, there is room to move the “strongly agree (that they are easy to use and understand)” score up.

Further improvement in these areas would positively impact overall satisfaction with Tarion.

- *Accessibility* continues to be a key strength and KPI of Tarion, and should be monitored to avoid any significant declines. At the same time, it will be difficult to improve performance on this attribute, therefore Tarion should look to other ways of increasing satisfaction as well.
- *Ensuring that new home builders fulfill their warranty obligations* also merits monitoring to avoid declines. Though it achieves strong ratings, they are somewhat lower than for other aspects of helping homeowners with the warranty process.
- Focus on improving processes and relations with homeowners in the Micro and Small possession groups. Again, Small Homeowners, especially Micro Homeowners, are less satisfied with their overall interactions with Tarion than owners of larger volume categories, and are least willing to advocate for it. Specifically, focus on:
 - helping them understand their warranty rights and obligations
 - again, making the *Tarion Homeowner Information Package (HIP)*, the *MyHome online service*, the *statutory warranty form* and the *Construction Performance Guidelines (CPG)* easier to use and understand – these are the groups that find them most difficult to use/least helpful.
- Collaborate with and advocate for builders on their current COVID-19 challenges – especially in terms of exploring ways to alleviate *repair delays*, *closing/occupancy delays* and *pre-delivery inspection disruptions* for new homeowners.

- Extra focus should be put on the High-Rise homeowner group in assisting them with their builder experience. They are consistently the least satisfied builder category. Leveraging and advocating for the following specific areas of the homeowner and builder experience will ultimately yield the most positive outcome for Tarion: managing expectations/communication effectiveness, timeliness of response to service and repair requests, customer service after moving in, quality of service and repairs, and follow-through on commitments.
- In future research, Tarion may wish to modify or add to its Key Performance Indicators. In recent years, the KPIs have not been found to be key satisfaction drivers. There may be other factors that merit ongoing monitoring as well, that yield positive outcomes for Tarion.
- In future research, Tarion may wish to consider shifting the focus from measuring “Satisfied” (i.e., Top Two box % – T2B) to “Very Satisfied” (Top Box %) – providing *exceptional* service. Many of the T2B scores in this study are consistently over 80%. Going forward, measuring and seeing improvement may become more difficult, given these already-high overall satisfaction levels. Further, it is usually the “very satisfied” (Top Box %) ratings that most closely reflect actual, “real-life” behaviour and attitudes.

Detailed Findings

This report is divided into five broad sections. The first section addresses the impact of the current COVID-19 situation and reactions to Tarion's response to it. The second and third sections explore homeowners' impressions of and interactions with Tarion. The fourth section evaluates the effectiveness of Tarion's communication materials. The final section addresses the relationship between the builders and Tarion.

Comparisons of the current survey findings to previous results from Tarion's 2019 New Home Owner Satisfaction Survey are included.

Impact of COVID-19

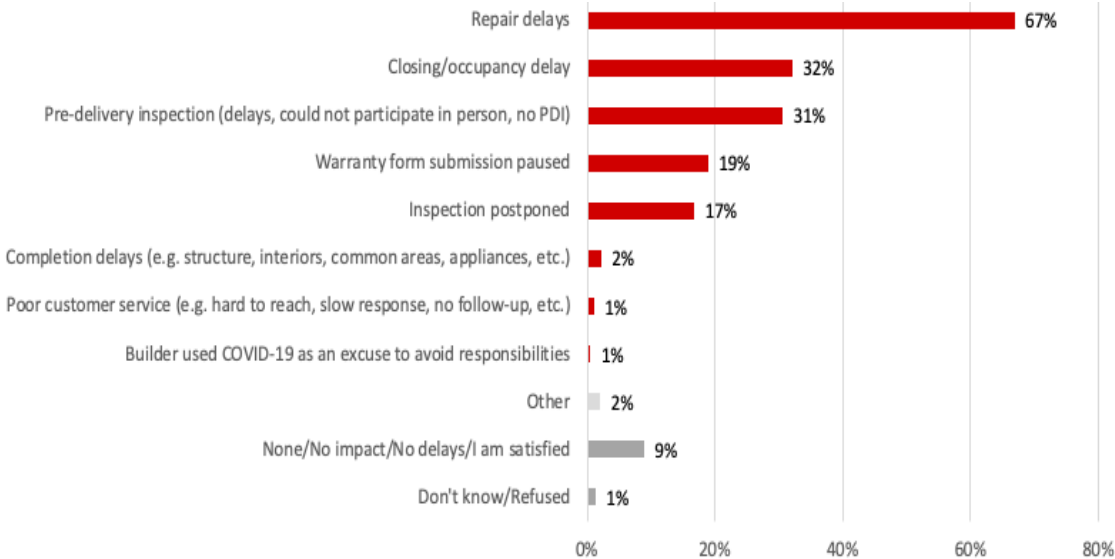
Impact on New Homeowners

Year 1 homeowners indicate that the greatest impact that COVID-19 has had on their new homes (from a given list of possible impacts) is *repair delays*, by far (67% of homeowners). This is followed by *closing/occupancy delays* and *pre-delivery inspection disruptions* (each experienced by 1-in-3 owners).

Generally, all of the disruptions are more likely felt by High-Rise and Large Homeowners, and also Medium Homeowners in the case of repair delays and pre-delivery inspection issues.

- High-Rise Homeowners are more likely than any others to experience closing/occupancy delays (53% of them) and pre-delivery inspection disruptions (45%)
- Large Homeowners are the ones most likely to experience repair delays (75%).

Small and Micro Homeowners are least likely to have experienced delays or to be otherwise impacted by COVID (21% and 28% indicate no impact respectively).



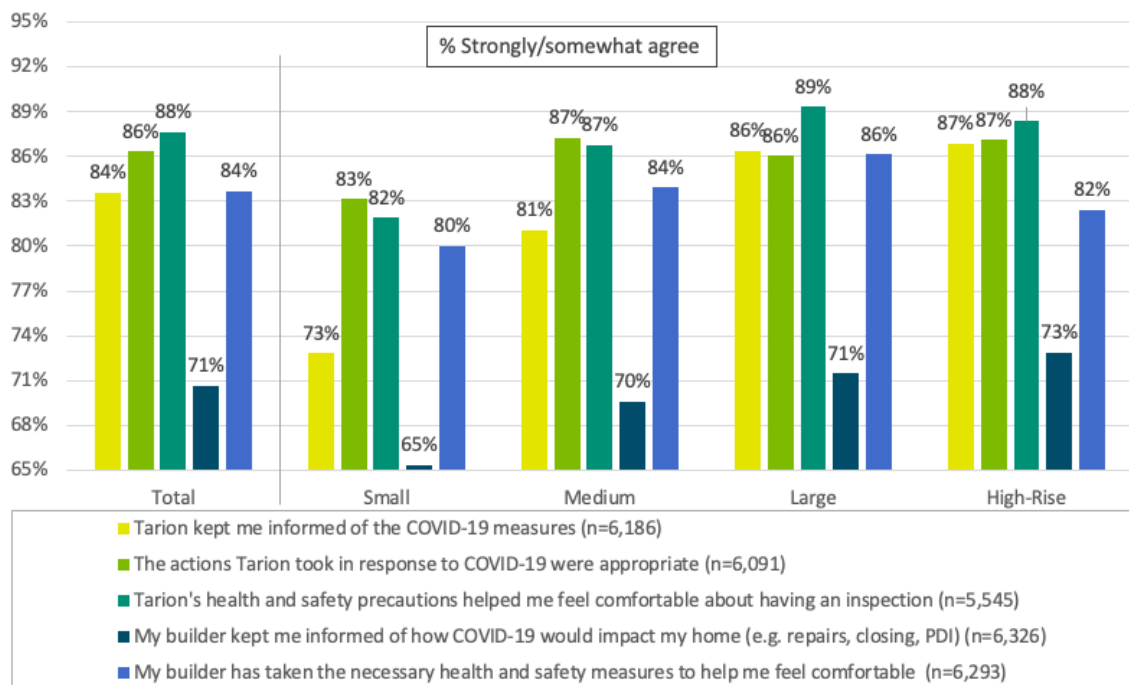
Source: Q2. What impact has the COVID-19 outbreak had on your home? (n=6,679)

Reactions to Tarion's Response to COVID-19

New homeowners are generally very satisfied with the measures that Tarion has taken in response to COVID-19. The vast majority (84%-88%) agree that the actions taken by Tarion are *appropriate*, and that Tarion has done a good job of *keeping them informed* of COVID-19 measures, and of implementing *health and safety precautions* that have made them feel comfortable about having representatives enter their homes. More tellingly, half of homeowners *strongly* agree with each of these statements – robust performance scores.

Tarion is perceived to perform much better than the builders at keeping homeowners informed of COVID-19 disruptions – 71% of owners agree that their builders have kept them informed (compared to 84% for Tarion). (The builders' health and safety ratings are fairly comparable to Tarion's).

Generally, High-Rise, Large and Medium Homeowners rate Tarion's and their builders' performance significantly more favourably than Small and (especially) Micro Homeowners.

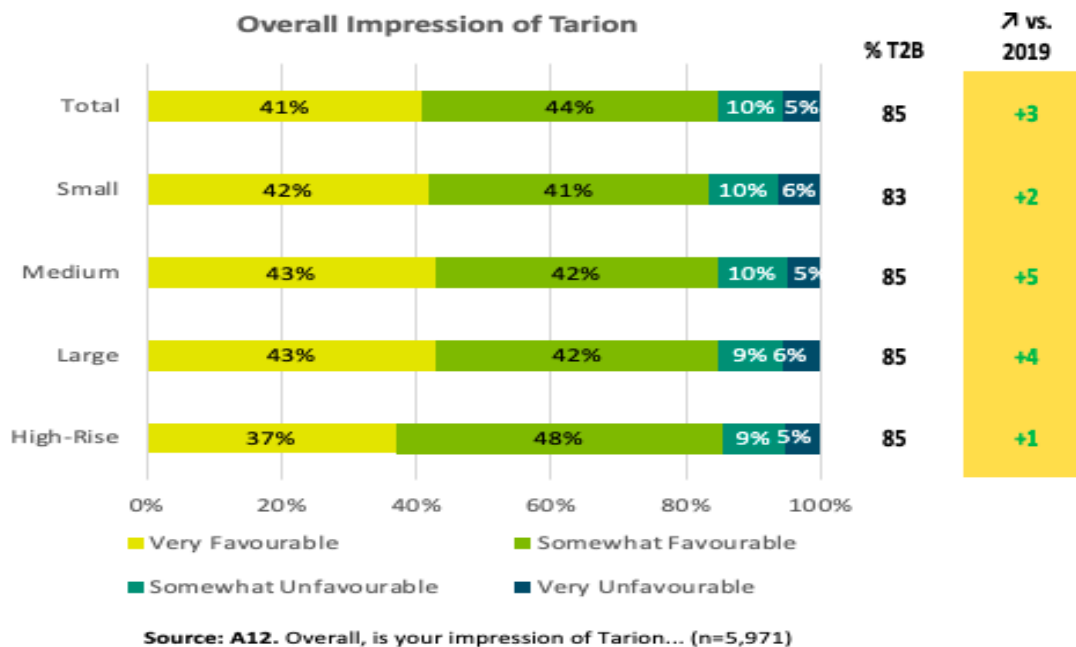


Home Owner Impressions of Tarion

Overall Impression of Tarion

A key overall impression measure in our survey assesses how favourably homeowners view Tarion. The vast majority of Year 1 homeowners (85%) have a favourable impression, and more tellingly, 41% have a *very favourable* impression – a strong score. These scores are consistent across all types of builders (Small, Medium, etc.).

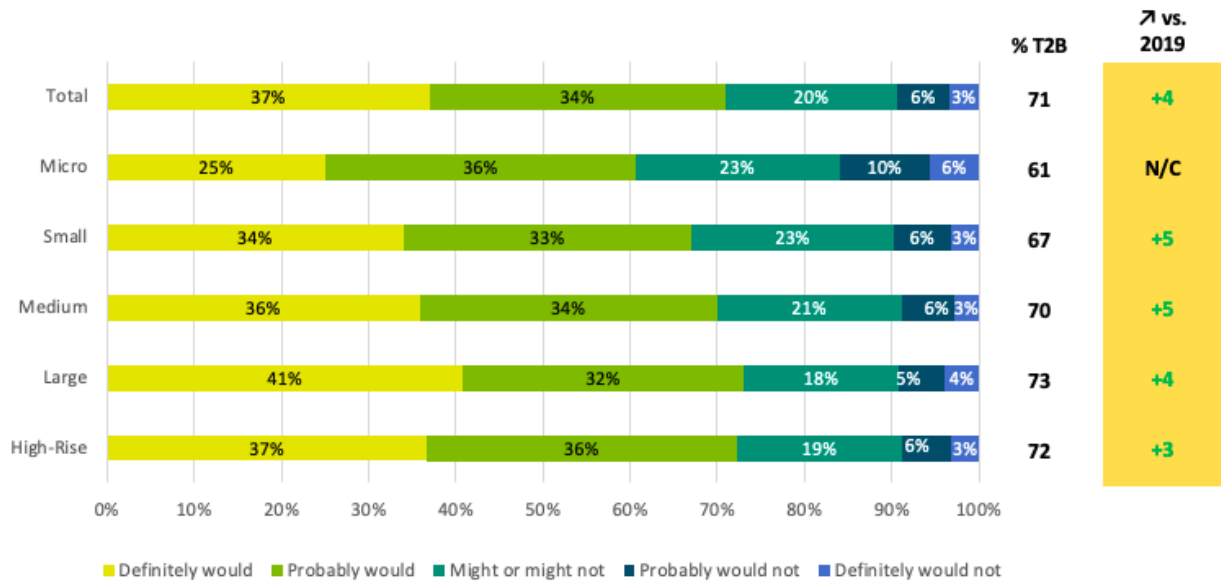
After a dip in 2019, the overall score has increased by 3%. This is mainly driven by increases among Medium and Large Homeowners.



Homeowner Advocacy of Tarion

Overall, Tarion’s advocacy measure (likelihood to recommend an organization or to say positive things about it to others) has remained relatively constant since 2014, ranging between 67%-70% who would definitely/probably say positive things about Tarion. After a slight decrease in 2019, Tarion’s overall advocacy rating has rebounded in 2020 to earlier levels (71% would definitely/probably advocate for Tarion in 2020). The increased ratings have occurred across most types of builders.

As in 2019, Smaller Homeowners are least willing to advocate for Tarion, especially Micro owners (61% definitely/probably would), whose ratings have remained at 2019 levels.



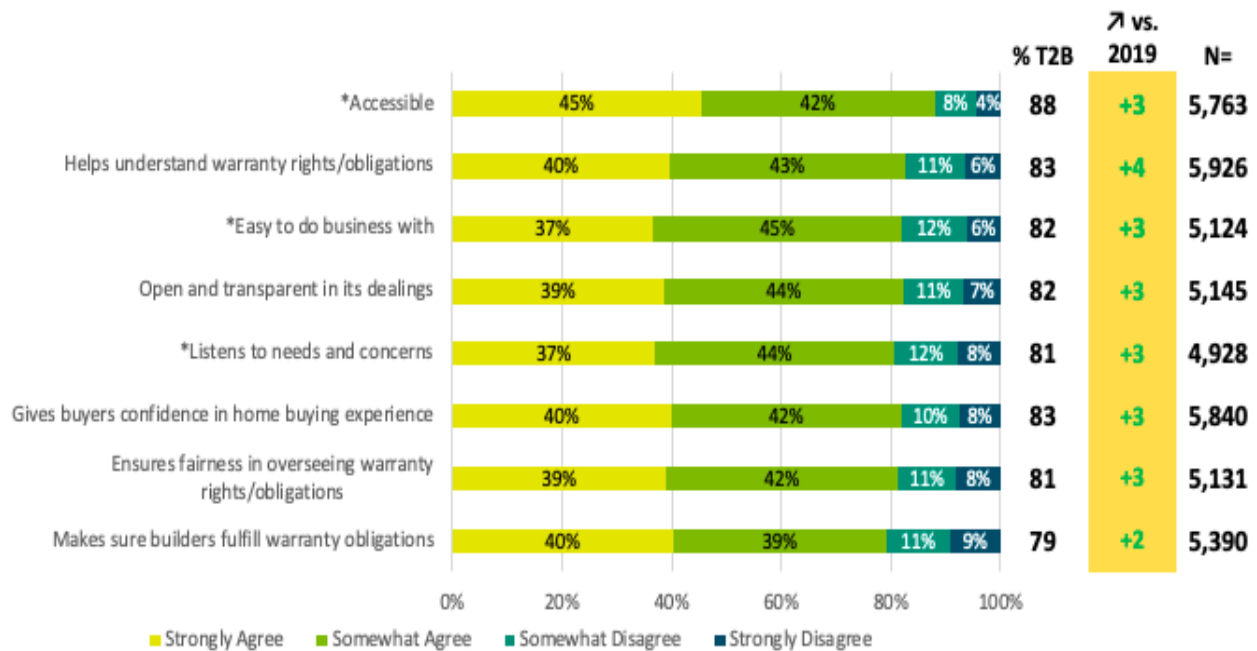
A13. If asked by potential new homeowners, how likely would you be to say positive things about Tarion? (n=6,679)

Specific Impressions of Tarion

In 2019, opinions of Tarion decreased on all service attributes compared to the previous year.

In 2020, ratings rebounded significantly to 2018 levels. This year, homeowners' specific impressions of Tarion are positive, with roughly 8-in-10 agreeing that Tarion delivers on each of the attributes listed below (79%-88%). More tellingly, about 4-in-10 homeowners *strongly* agree with each statement – strong performance scores. This includes opinions on the three Key Performance Indicators: *being accessible, being easy to do business with* and *listening to the needs and concerns of new homeowners*.

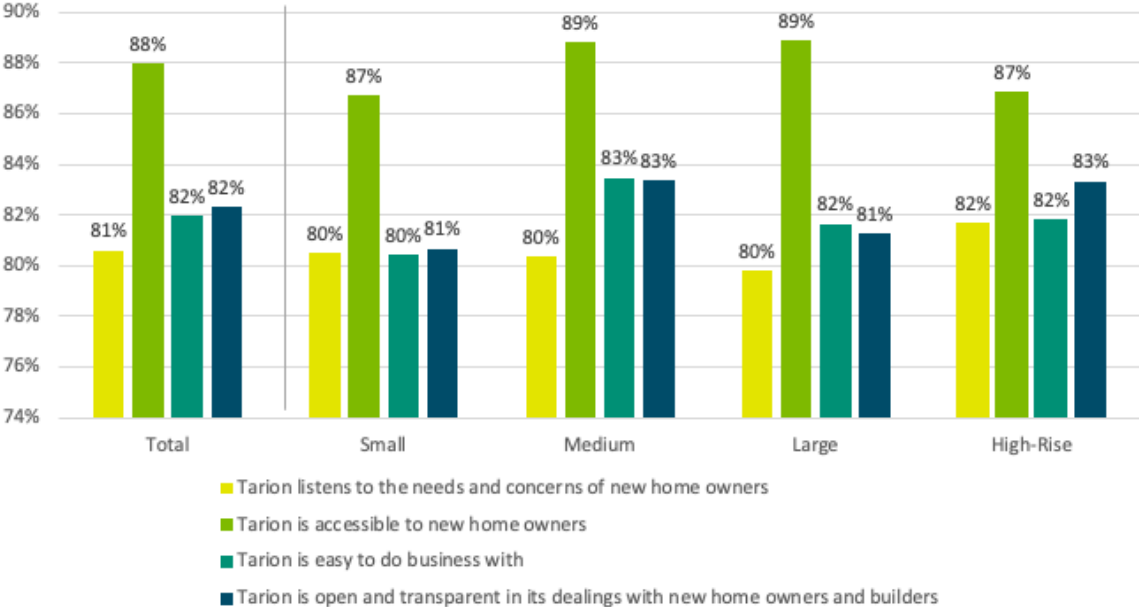
Accessibility continues to be Tarion's top strength (88%) and this remains consistent year after year. *Making sure that new home builders fulfill their warranty obligations* achieves somewhat lower ratings overall than other attributes.



A10-11. Based on your impressions of Tarion, to what extent do you agree or disagree...?

Homeowners in all builder categories are significantly more likely to agree that Tarion's greatest strength is its *accessibility* compared to other attributes.

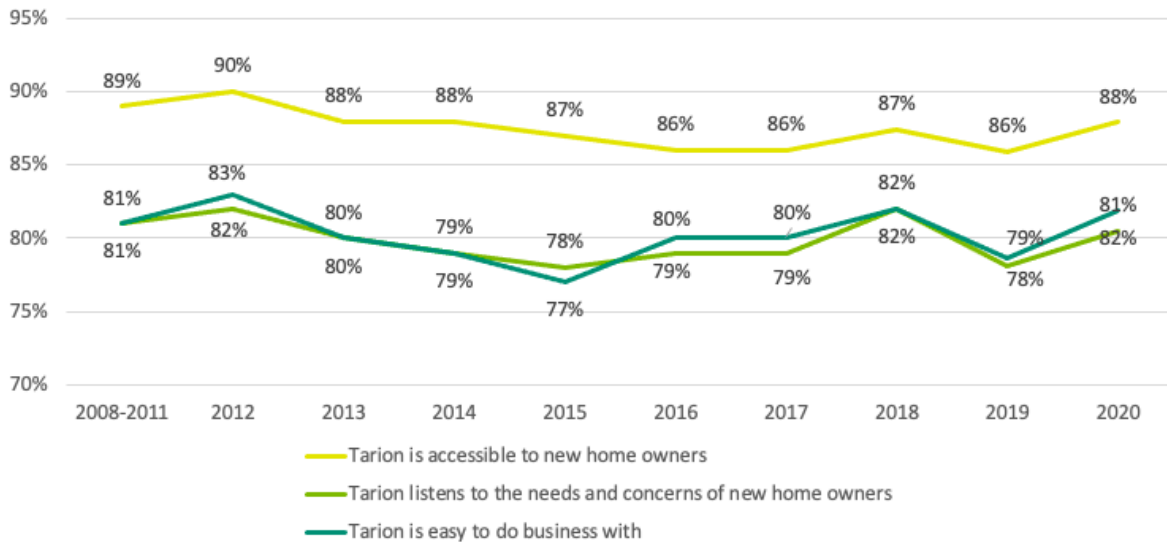
Tarion performs equally well in the other areas, among homeowners across all builder categories.



Tarion’s performance with regard to *accessibility to new homeowners* has remained constant over time (no significant differences).

After a significant decline in 2019, the rating of being *easy to do business with* rebounded in 2020, bringing it back to the same levels seen since 2016.

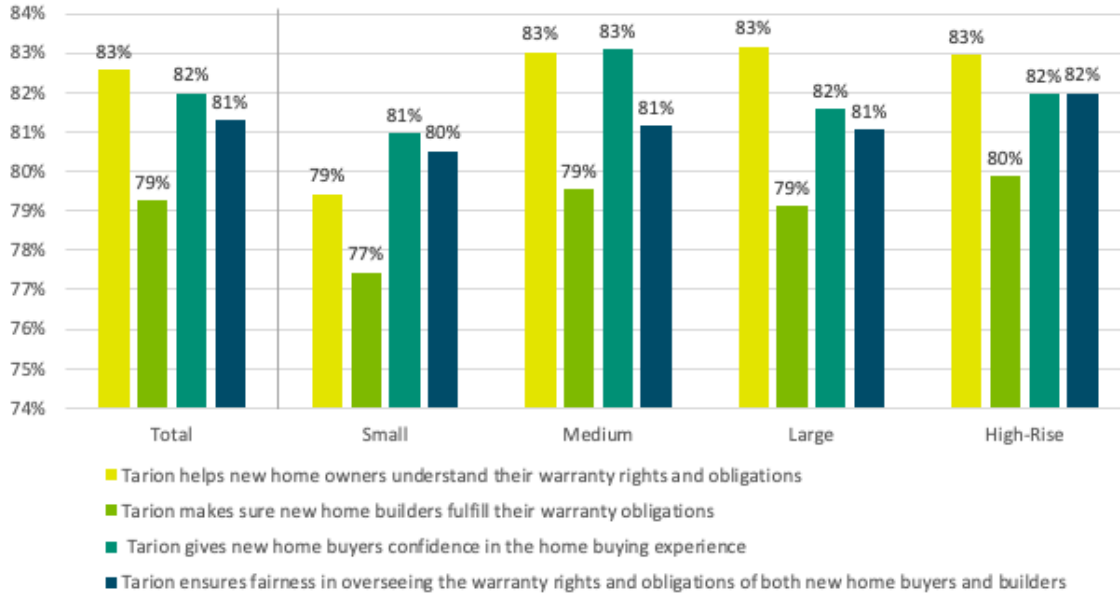
After a significant decline in 2019, Tarion’s performance in terms of *listening to the needs of new homeowners* has also rebounded to 2018 levels – levels not otherwise seen since 2012.



Compared to other service attributes, Tarion performs slightly less well on *making sure new home builders fulfill their warranty obligations* among homeowners across all builder categories (79% agree overall, essentially unchanged from 2019).

Small Homeowners are least likely to feel that Tarion *helps new homeowners understand their warranty rights and obligations*. (Generally, Micro Homeowners are less likely than other owners to agree that Tarion delivers on the Key Performance indicators).

Tarion performs equally well in the other areas, among homeowners across all builder categories.



Home Owner Evaluation of Tarion’s Service Capabilities

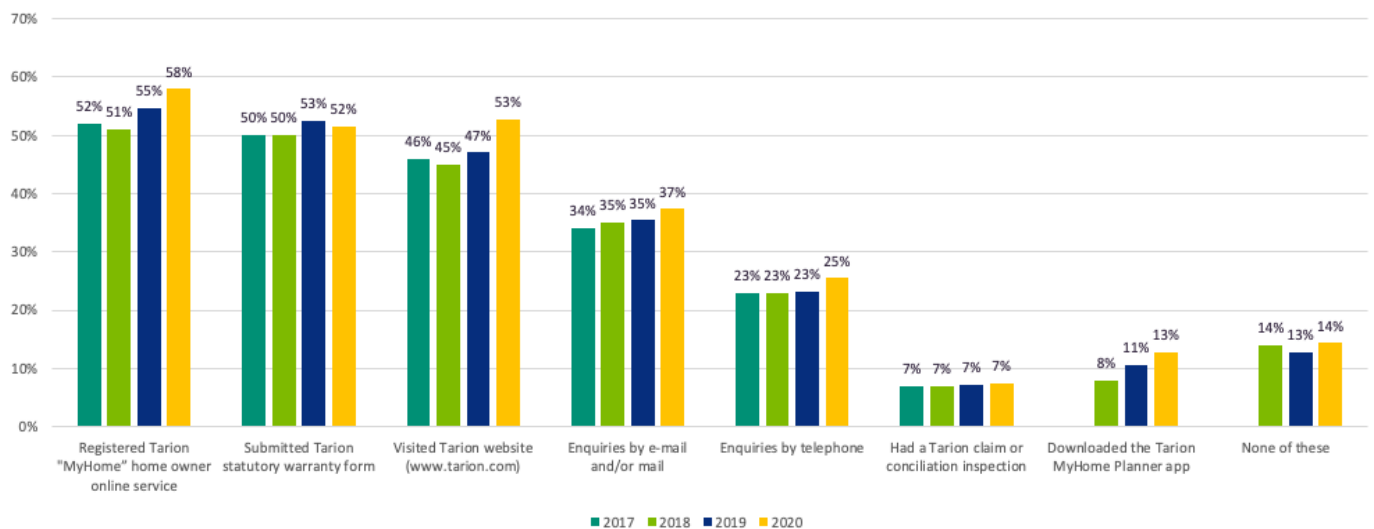
Nature of Contact and Engagement Levels with Tarion

In 2020, 86% of Year 1 homeowners report some contact with Tarion – the same level seen in the past two years.

Use of the *MyHome portal* and the *Tarion website* has steadily grown since 2018. The *Tarion MyHome Planner app* has also seen steady increases in use since measurement of this service began in 2017. Use of other vehicles has remained relatively constant since 2017.

Overall, as in previous years, the main points of contact that new homeowners have had with Tarion in 2020 are the *MyHome portal* (58%), followed by the *Tarion website* and the *statutory warranty form* (53% and 52% respectively).

High-Rise and Large Homeowners are more likely to have used virtually all contact vehicles, followed by those in the Medium category. 14% of homeowners have not had contact with Tarion via any of the avenues measured, and these are more likely to be concentrated among Micro and Small Homeowners.



A1. What contact, if any, have you had with Tarion? (N=6,679)

Overall Interactions with Tarion

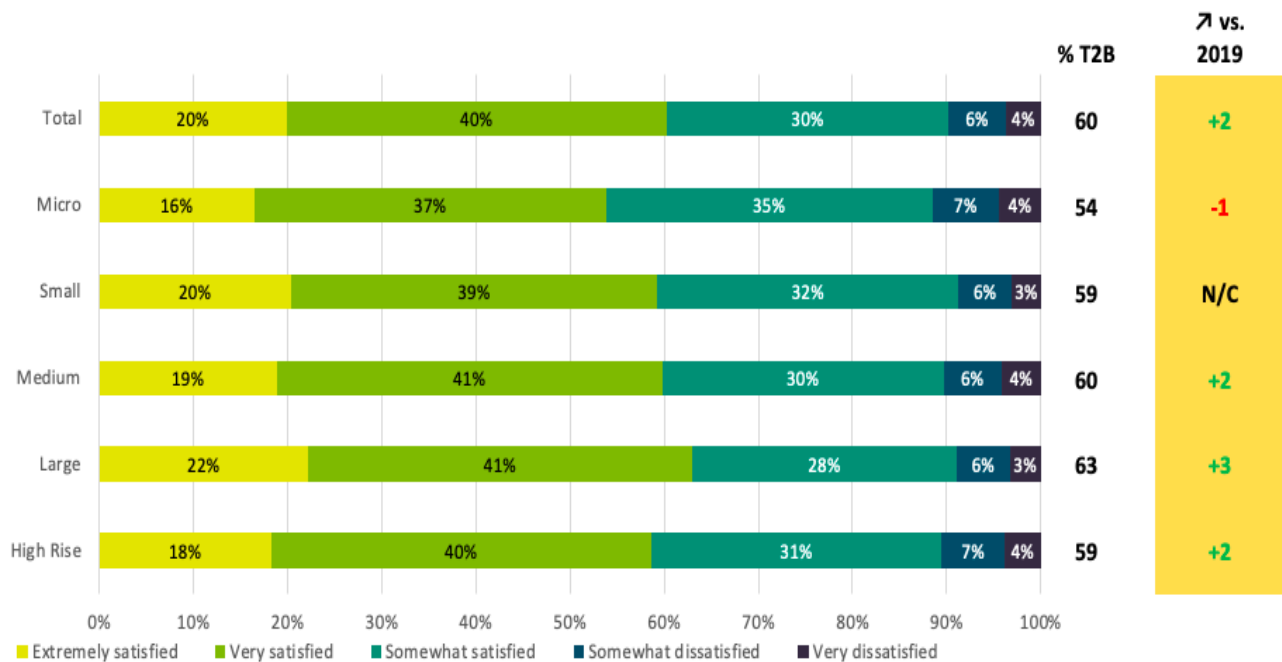
In 2019, the total and individual satisfaction ratings did not change significantly from 2018, but appeared to show an overall pattern of decreases since then.

In 2020, satisfaction with Tarion interactions seemed to rebound to 2018 levels.

Overall, 60% of homeowners who interacted with Tarion in 2020 (by telephone, email, the website, MyHome, the statutory warranty form, or a claim/conciliation inspection) are extremely or very satisfied with their interactions.

As in 2019, Large Homeowners report slightly higher satisfaction (63%) compared to other builder categories. Micro Homeowners are directionally least satisfied with their interactions.

In all cases, there is an opportunity to move the satisfaction scores up.

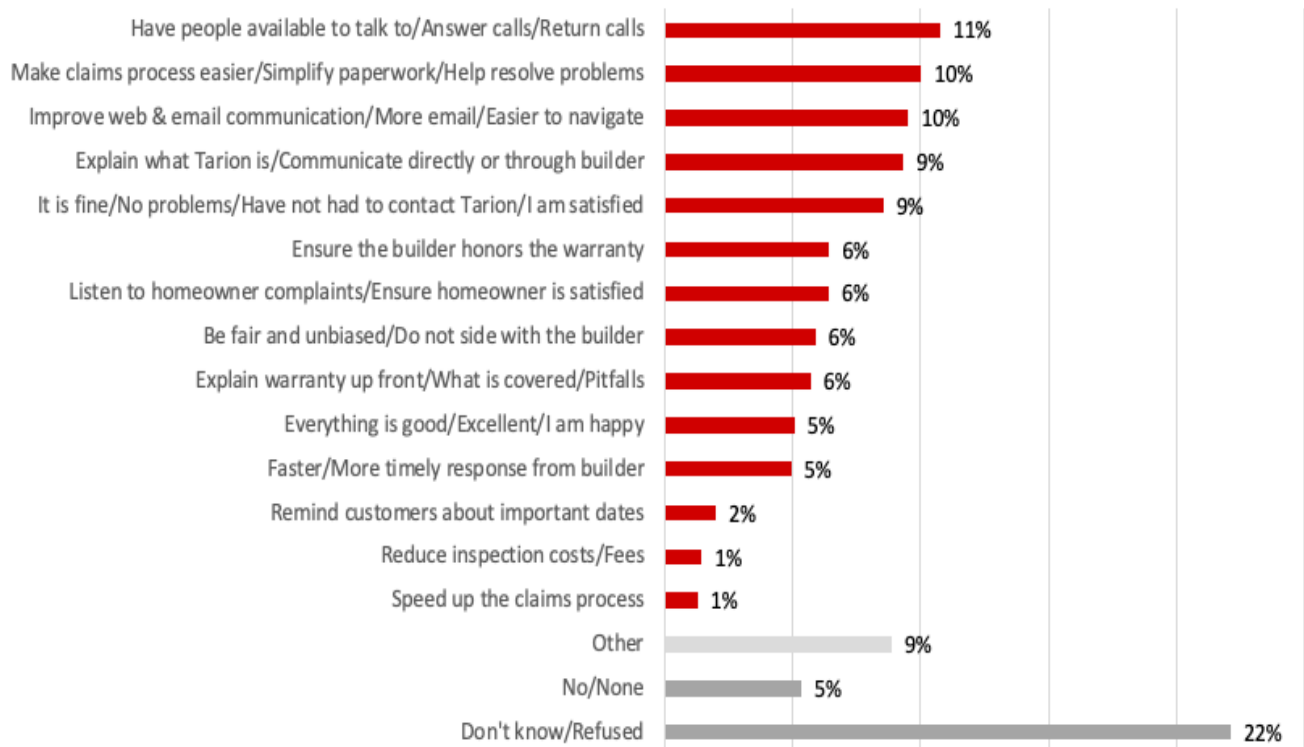


A1A. How satisfied were you with your interactions with Tarion? Base: Excluding "None of these" @ A1 (N=5,721)

How Tarion Can Better Serve Homeowners' Needs

Respondents were asked on an open-ended basis, how Tarion could better serve the needs of new homeowners. They offered a range of suggestions, topped by:

- Easier access – having representatives available to answer calls and return calls
- Simplifying and speeding up the claims process
- Improving web and email communications
- More clearly explaining what Tarion's role and mandate is.



Source: A14. Please describe how Tarion can better serve the needs of new homeowners (n=6,679)

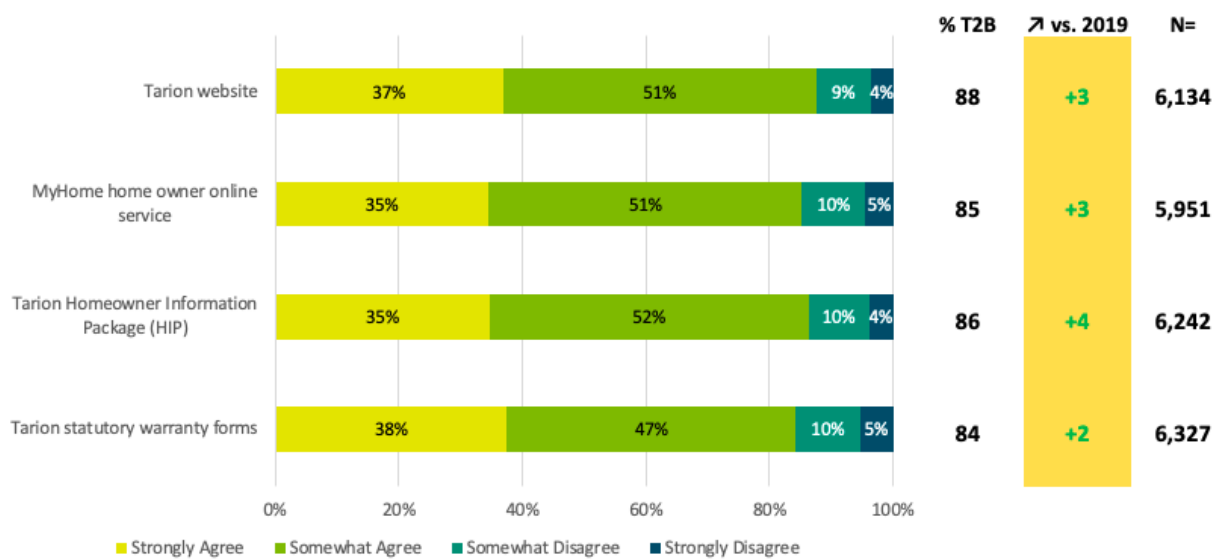
Perceptions of Tarion Communication Materials

Though not significant, ratings of the ease of understanding Tarion communication materials showed a pattern of decreases in 2019. In 2020, ratings have rebounded significantly in all areas.

The vast majority of respondents (84%-88%) at least somewhat agree that each of *Tarion's website*, *Tarion HIP*, *MyHome online service*, and *Tarion's statutory warranty form* is easy to use and understand. In each case, just over one-third (35%-38%) *strongly agree*, suggesting that there is room to enhance the ease of use of these vehicles.

As in past years, the *Tarion website* continues to be the area that is perceived to be the easiest to use and understand.

High-Rise, Large and Medium Homeowners find all of these items easier to use than Smaller Homeowners, especially Micro owners.



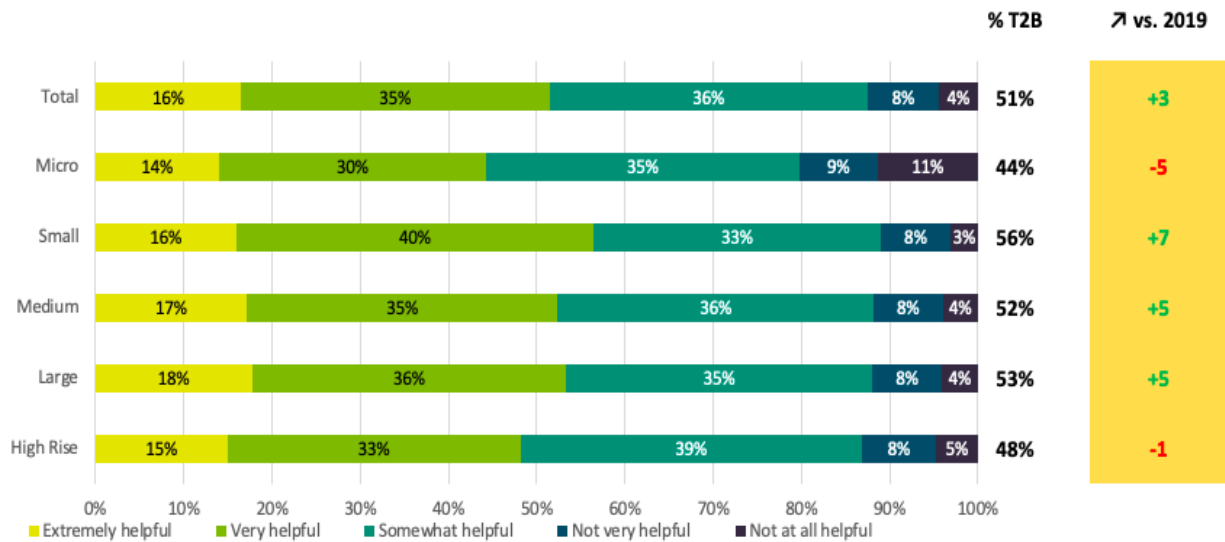
ASA-D. To what extent do you agree or disagree with the following Tarion items are "easy to use and understand"?

Using the Tarion Construction Performance Guidelines (CPG)

One-third of homeowners (35%) used or referenced Tarion’s Construction Performance Guidelines in 2020, the same proportion as in 2019 (34%).

Of those who have used the guideline, about half (51%) find it extremely or very helpful overall, a rebound from the previous year, and a score that is fairly consistent across builder categories. Micro Homeowners are least likely to find the CPG helpful, though ratings remain strong in that group.

The greatest rebounds since 2019 were among Medium and Large Homeowners. Small Homeowners are increasingly finding the CPG helpful over time. Micro Homeowners’ perceptions of the CPG’s usefulness declined in 2020.



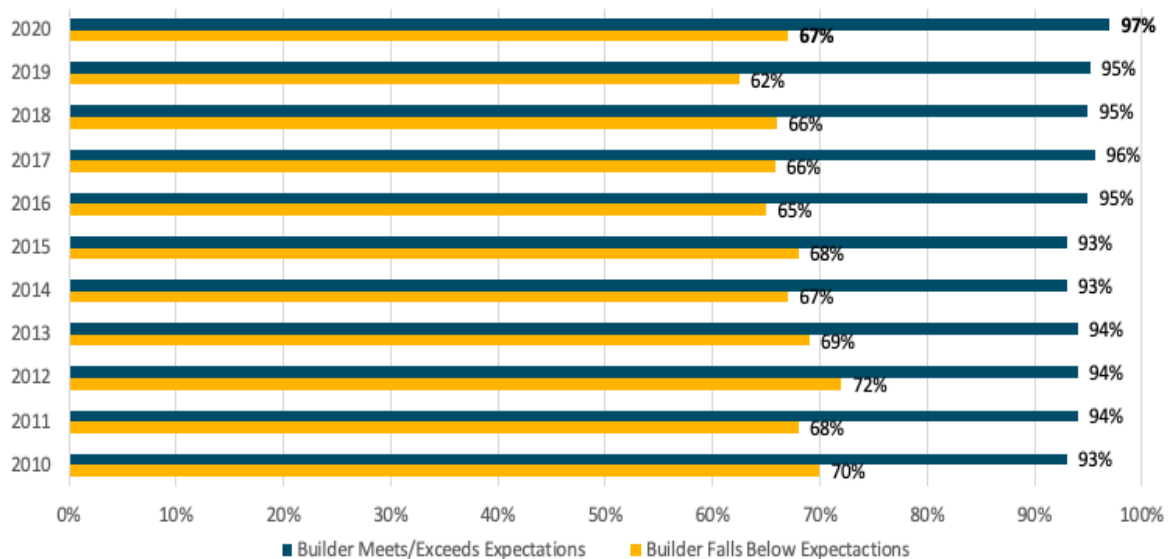
A9E. Have you ever used or referenced Tarion's Construction Performance Guidelines?
If yes, how helpful was the information you obtained from the Tarion Construction Performance Guidelines? (N=2,348)

The Builder Experience

As is the case each year, the builder experience has a direct and significant impact on homeowners' impressions of Tarion and their likelihood to say positive things about the organization. When builders have met or exceeded homeowner expectations, opinions of Tarion are significantly higher. Similarly, when builders do not meet expectations, homeowners' opinions of Tarion are significantly lower.

The following graph shows the strength of this relationship in each year. When builders meet or exceed expectations, homeowners are more likely to have a favourable view of Tarion (blue bars). When builders fall below expectations, homeowners are less likely to have a favourable impression of Tarion (yellow bars).

In 2020, 97% of homeowners whose builder met or exceeded expectations, had a favourable impression of Tarion – a level which has held steady since 2016. Meanwhile, there was a significant drop in favourable impressions of Tarion (67%) among homeowners whose builder fell below expectations. This measure has also remained relatively constant since 2014.



3

A12. Overall, is your impression of Tarion... (N=5,971)

APPENDIX
2020 New Homeowner Satisfaction Survey

New Home Owner Satisfaction Survey



This study is being conducted by Forum Research Inc. on behalf of Tarion. All your responses will be kept anonymous and strictly confidential.

Complete the survey **online** by going to fmrch.com/tarion1 and typing in your unique ID: #####.

Remplissez le sondage **en ligne** en vous rendant à l'adresse suivante fmrch.com/tarion1 et inscrivez ensuite votre numéro d'identification unique: #####.

ਇਸ ਲਿੰਕ fmrch.com/tarion1 ਤੇ ਜਾ ਕੇ ਅਤੇ ਆਪਣੀ ਅਨੂਠੀ ਪਛਾਣ ਸੰਖਿਆ ##### ਟਾਈਪ ਕਰਕੇ ਸਰਵੇਖਣ ਨੂੰ ਆਨਲਾਈਨ ਪੂਰਾ ਕਰੋ।

با رجوع به fmrch.com/tarion1 و وارد کردن شماره شناسه منحصر به فرد خود ##### ، نظرسنجی را به طور آنلاین تکمیل کنید.

进入 fmrch.com/tarion1 并输入您的唯一 ID 号 ##### ，完成在线调查

COVID-19: Understanding the Impact

The COVID-19 outbreak resulted in significant disruptions in the new home building industry in 2020. In response, and as a result of the Government of Ontario's Emergency Orders, Tarion took various precautionary measures and adjusted our operations to ensure the health and safety of homeowners, builders, and the greater community. To help us assess the impact of the COVID-19 outbreak and our measures, please answer the questions below.

Q1. To what extent do you agree or disagree with the following:	Strongly Agree	Somewhat Agree	Somewhat Disagree	Strongly Disagree	Not Applicable
a) Tarion kept me informed of the COVID-19 measures and how they might affect my home	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
b) The actions Tarion took in response to COVID-19 (e.g. pausing warranty timelines and repair periods, stopping in-person inspections) were appropriate	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
c) Tarion's health and safety precautions helped me feel comfortable about having representatives enter my home for an inspection	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
d) My builder kept me informed of how COVID-19 would impact my home (e.g. repairs, closing, PDI)	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
e) My builder has taken the necessary health and safety measures to help me feel comfortable in having builder representatives or tradespeople enter my home	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

Q2. What impact has the COVID-19 outbreak had on your home? Please check all that apply:	
<input type="radio"/> Closing/occupancy delay	<input type="radio"/> Repair delays
<input type="radio"/> Pre-delivery inspection (delays, could not participate in person, no PDI)	<input type="radio"/> Inspection postponed
<input type="radio"/> Warranty form submission paused	<input type="radio"/> Other (please specify): _____

Part A: Understanding Your Experience with Tarion

A1. What contact, if any, have you had with Tarion? Please check all that apply:	
<input type="radio"/> Enquiries by telephone	<input type="radio"/> Visited the Tarion website (www.tarion.com)
<input type="radio"/> Enquiries by e-mail and/or mail	<input type="radio"/> Registered to use the Tarion "MyHome" homeowner online service
<input type="radio"/> Submitted a Tarion statutory warranty form	<input type="radio"/> Downloaded the Tarion MyHome Planner app
<input type="radio"/> Had a Tarion claim or conciliation inspection	<input type="radio"/> None of these (If "None of these" Go to A9)

A1a. How satisfied were you with your interactions with Tarion?				
<input type="radio"/> Extremely Satisfied	<input type="radio"/> Very Satisfied	<input type="radio"/> Somewhat Satisfied	<input type="radio"/> Somewhat Dissatisfied	<input type="radio"/> Very Dissatisfied

Communication

A9. To what extent do you agree or disagree that each of the following Tarion items are "easy to use & understand":	Strongly Agree	Somewhat Agree	Somewhat Disagree	Strongly Disagree	Not Applicable
a) Tarion Homeowner Information Package (HIP)	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
b) Tarion statutory warranty forms (i.e., 30-day form, year-end form)	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
c) Tarion website (tarion.com)	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
d) MyHome homeowner online service	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

A9a2. How did you receive the Homeowner Information Package (HIP)? *Select one.*

<input type="radio"/> Builder printed & provided a hard copy	<input type="radio"/> Other (please specify): _____
<input type="radio"/> Builder sent it as an attachment by email (e.g. PDF)	<input type="radio"/> I don't recall "how" I received it
<input type="radio"/> Builder sent an email with a link to the e-version online	<input type="radio"/> I did not receive it at all
<input type="radio"/> Builder provided it on a memory stick or CD	

A9d. How did you research your builder's past performance prior to making your purchase decision? *Please check all that apply:*

<input type="radio"/> "Ontario Builder Directory" section of the Tarion website	<input type="radio"/> Google search
<input type="radio"/> Recommendation from friends, family, acquaintances	<input type="radio"/> Facebook
<input type="radio"/> Talked to previous owners of builder	<input type="radio"/> Twitter
<input type="radio"/> Web search for award recipients (e.g. Tarion, OHBA or BILD)	<input type="radio"/> New Home Information website (specify): _____
<input type="radio"/> Builder's website or other advertising	<input type="radio"/> Other (please specify): _____
<input type="radio"/> Local Home Builders' Association	

A9e. Have you ever used or referenced Tarion's Construction Performance Guidelines? If yes, how helpful was the information you obtained from the Tarion Construction Performance Guidelines?

No – I have not used or referenced Tarion's Construction Performance Guidelines

Yes – Extremely helpful Very helpful Somewhat helpful Not very helpful Not at all helpful

Impressions of Tarion

A10. To what extent do you agree or disagree:

	Strongly Agree	Somewhat Agree	Somewhat Disagree	Strongly Disagree	No Opinion
a) Tarion is accessible to new home owners	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
b) Tarion listens to the needs & concerns of new home owners	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
c) Tarion is easy to do business with	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
d) Tarion is open & transparent in its dealings with new home owners & builders	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

A11. To what extent do you agree or disagree:

	Strongly Agree	Somewhat Agree	Somewhat Disagree	Strongly Disagree	No Opinion
a) Tarion helps new home owners understand their warranty rights & obligations	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
b) Tarion makes sure new home builders fulfill their warranty obligations	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
c) Tarion gives new home buyers confidence in the home buying experience	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
d) Tarion ensures fairness in overseeing the warranty rights & obligations of both new home buyers & builders	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

A12. Overall, is your impression of Tarion...

Very Favourable Somewhat Favourable Somewhat Unfavourable Very Unfavourable No Opinion

A12a. Why did you rate your impression of Tarion the way you did? (Please feel free to attach additional pages if needed).

A13. If asked by potential new home owners, how likely would you be to say positive things about Tarion?

Definitely would Probably would Might or might not Probably would not Definitely would not

A14. Please describe how Tarion can better serve the needs of new home owners. (Please feel free to attach additional pages if needed.)

Customer Service After Moving In

	Yes	No
B6. Did your builder provide you with complete and accurate contact information for service and repairs?	<input type="radio"/>	<input type="radio"/>

B7. Please rate your satisfaction with your builder on:	Extremely Satisfied	Very Satisfied	Somewhat Satisfied	Somewhat Dissatisfied	Very Dissatisfied	Not Applicable
a) Timeliness of response to service & repair requests	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
b) Willingness to schedule service & repairs at a time convenient to you	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
c) Ability to complete the repairs & leave your home clean & damage free	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
d) Overall quality of service & repairs	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
e) Ability to instill a feeling of confidence in their work & ongoing commitment to service	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

B8. Overall, how satisfied were you with your builder's customer service AFTER you moved into your new home?
<input type="radio"/> Extremely Satisfied <input type="radio"/> Very Satisfied <input type="radio"/> Somewhat Satisfied <input type="radio"/> Somewhat Dissatisfied <input type="radio"/> Very Dissatisfied

B8i. Why did you rate your satisfaction with your builder's customer service AFTER you moved into your new home the way you did? Please provide as much detail as possible.

Overall Satisfaction

B9. Please rate your satisfaction with your builder on:	Extremely Satisfied	Very Satisfied	Somewhat Satisfied	Somewhat Dissatisfied	Very Dissatisfied	Not Applicable
a) Being accessible to you	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
b) Ability to listen to & understand your needs	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
c) Overall communication effectiveness	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
d) Overall customer service	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

B9e. Overall, how satisfied have you been with the home warranty coverage available on your home?
<input type="radio"/> Extremely Satisfied <input type="radio"/> Very Satisfied <input type="radio"/> Somewhat Satisfied <input type="radio"/> Somewhat Dissatisfied <input type="radio"/> Very Dissatisfied

B9e2. Which of these problems or issues, if any, have you experienced?	
<input type="radio"/> Water penetration (e.g. foundation, roof, or other part of building envelope)	<input type="radio"/> Defect in the exterior cladding (e.g. brick, siding or stucco)
<input type="radio"/> Defect in the interior finishes (e.g. trim, cabinetry, drywall, or paint)	<input type="radio"/> Structural problems (e.g. issues with load-bearing walls, foundations, etc.)
<input type="radio"/> Heating & ventilation distribution system (i.e. HVAC)	<input type="radio"/> Other (please specify): _____
<input type="radio"/> Defect in the flooring	<input type="radio"/> I did not experience any problem with my home (SKIP TO B11)

	Yes	No (Skip to B11)
B9e3. Has a repair been scheduled or completed to address the problem(s) in your home?	<input type="radio"/>	<input type="radio"/>

B9e4. Did the repair fix the problem(s) with your home the first time or did the problem(s) recur? Select the ONE response that best describes your situation.	
<input type="radio"/> Repair fixed the problem(s) the first time	<input type="radio"/> The problem(s) recurred, but was (were) eventually resolved
<input type="radio"/> The problem(s) recurred & remains unresolved	<input type="radio"/> A repair has been scheduled to be completed

B11. How well did your experience with your new home and your builder meet your expectations?
<input type="radio"/> Well above expectations <input type="radio"/> Above expectations <input type="radio"/> Met expectations <input type="radio"/> Below expectations <input type="radio"/> Well below expectations

B12. How likely would you be to recommend your builder to friends or family members thinking of buying a new home?
<input type="radio"/> Definitely would <input type="radio"/> Probably would <input type="radio"/> Might or might not <input type="radio"/> Probably would not <input type="radio"/> Definitely would not

B12i. What parts of your new home ownership experience had the most influence on your likelihood to recommend response? Please provide as much detail as possible.

B18. Please use this space to share any final comments with us about your experience with your builder. (Please feel free to attach additional pages if needed).

Responding to This Survey

	Yes	No
A. Did your builder, or anyone working with your builder, pressure you or offer an incentive to provide a positive response to this survey?	<input type="radio"/>	<input type="radio"/>
Our records indicate the following primary email: [EMAIL], is it correct?		
Our records indicate the following primary telephone number: [PHONE], is it correct?		

If you are mailing your completed survey, please use the postage-paid envelope provided and return it before December 31st, 2020.

***Your responses are very valuable to us.
Thank you very much for taking the time to provide your feedback.***

