



**2021 New Home Owner Satisfaction Survey**  
*Understanding New Homeowner Impressions of Tarion*

**Executive Summary and Detailed Findings**

**Prepared for: Tarion**

**Year 1 Possessions  
10 March 2022**

### **Proprietary Warning**

The information contained herein is proprietary to Tarion Warranty Corporation and may not be used, reproduced or disclosed to others except as specifically permitted in writing by the originator of the information. The recipient of this information, by its retention and use, agrees to protect the same and the information contained therein from loss, theft or compromise. Any material or information provided by Tarion Warranty Corporation and all data collected by Forum Research will be treated as confidential by Forum Research and will be stored securely while on its premises (adhering to industry standards and applicable laws).

**Table of Contents**

- Introduction..... 4**
  - Why the Need for Research? ..... 4**
  - Research Approach ..... 4**
- Executive Summary..... 6**
  - Drivers of New Homeowner Satisfaction with Tarion ..... 6**
  - Homeowner Impressions of Tarion ..... 6**
  - Contact with Tarion..... 8**
  - The Impact of COVID-19 on New Homeowners..... 8**
  - Differences Among Homeowner Possession Groups ..... 9**
  - The Builder Experience ..... 10**
  - Tarion Outreach Opportunities ..... 11**
- Detailed Findings..... 13**
- Impact of COVID-19..... 14**
  - Impact on New Homeowners ..... 14**
  - Reactions to Tarion’s Response to COVID-19..... 15**
- Home Owner Impressions of Tarion..... 16**
  - Overall Impression of Tarion ..... 16**
  - Homeowner Advocacy of Tarion ..... 17**
  - Specific Impressions of Tarion ..... 18**
- Home Owner Interactions with Tarion..... 22**
  - Nature of Contact and Engagement Levels with Tarion ..... 22**
  - Satisfaction with Tarion Interactions ..... 23**
  - How Tarion Can Better Serve Homeowners’ Needs ..... 24**
- Perceptions of Tarion Communication Materials ..... 25**
- The Builder Experience ..... 26**
- APPENDIX 2021 New Homeowner Satisfaction Survey ..... 27**

## 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.

All consumers in Ontario who took possession of a new home between October 1, 2020 and August 31, 2021 were invited to participate. In total, 47,595 survey invitations and reminders 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.

Home buyers were either emailed or postage mailed an invitation to complete an online survey. All homeowners were provided with an option to dial in to a toll-free number to request a paper copy of the survey, sent to them with a postage-paid return envelope. The survey was offered in English, French, Mandarin, Punjabi, and Farsi.

- **41,986 invitations** were sent via email, where an email address was present on file
  - To enhance response rates, 6 reminders were sent by email to non-responders
- **6,226 invitations** were mailed to those who did not have email addresses on file. Homeowners were sent postcards with a link to the online survey and instructions on how to access it.
  - 1 postcard reminder was sent to non-responders
- **29,218 reminder calls** were made by IVR method, where a valid telephone number was present on file
  - 1 reminder call was made to non-responders.

With each subsequent reminder, respondents who had completed the survey, sold the property, and/or unsubscribed from the survey were removed from the list.

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.

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 pre-paid Mastercards, worth \$500 each) were offered to encourage both overall and online participation. Tarion agreed not to discuss the contents of the survey with homeowners at any time while it was in the field.

Respondents could complete the survey between September 16<sup>th</sup> and December 7<sup>th</sup>, 2021. Forum Research accepted and tabulated all surveys received on or before this date. The average survey length was about 21 minutes.

In total, 7,604 completed surveys were received. This represented a survey response rate of 16.0% – an increase of 2.1% from the previous year.

The breakdown of the 7,604 completed surveys consisted of the following:

- 2,207 purchased a High-Rise condominium (“High-Rise Homeowners”)
- 2,597 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)
- 1,789 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)
- 671 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)
- 340 purchased a home from a “Micro” builder (i.e., bought from a builder that had 1-4 Freehold or Low-rise condo possessions).

At a 95% level of confidence, the margin of error on the total sample size of 7,604 is +/- 1.04%. Most measures are tracked against a survey of 6,679 homeowners completed during the same period of 2020, which had similar statistical accuracy. Results for sub-samples by builder segment have a higher margin of error, as do questions asked among only a subset of homeowners.

In 2021, two open-ended follow-up questions were added to the survey for further clarification, along with two demographic questions.

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., % satisfied) do accurately reflect their unrounded parts. “N/C” denotes no change.*

*Unless noted otherwise, all percentage callouts/commentary in this report are with regards to the top two categories (T2B, e.g., very satisfied + somewhat satisfied). Percentage callouts/commentary in this report with regards 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 2021 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., willingness 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 in 2021

Tarion’s Performance is Weaker Areas of Opportunity for Tarion
<b>Consistent with 2020:</b> <ul style="list-style-type: none"><li>• Gives new home buyers confidence in the home buying experience (82%)</li><li>• Satisfaction with interactions with Tarion (57%)</li></ul>
<b>Also in 2021:</b> <ul style="list-style-type: none"><li>• Ensures new home builders fulfill their warranty obligations (79%)</li></ul>

These are important 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 KPIs are not Key Satisfaction Drivers.

## Homeowner Impressions of Tarion

- After a slight decrease in 2019, overall impressions of Tarion rebounded in 2020 and were sustained through 2021. Overall impressions have been equally positive in 2020 and 2021.
  - In 2021, the vast majority of Year 1 homeowners (85%) have a *favourable impression* of Tarion, and more tellingly, 42% have a *very favourable impression* – a strong score
  - Over 2 in 3 homeowners (72%) are *willing to advocate* for/say positive things about Tarion.

- Tarion’s **Service Orientation Index (SOI)** is its Corporate **Key Performance Indicator (KPI)** used for measuring Homeowner Satisfaction. The Corporate KPI 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 SOI rebounded to 83%, after dipping to 81% in 2019. In 2021, the SOI increased further to 85%, meeting Tarion’s SOI goal (82%). In fact, the SOI of 85% is the highest rate in the past 10 years and it is only slightly shy of meeting the standard for exceeding the SOI goal (86%).
  - In 2021, Tarion performs well on the three specific KPI elements. Over 8-in-10 homeowners agree that Tarion delivers on *being accessible* (89%), *being easy to do business with* (84%), and *listening to the needs and concerns of new homeowners* (82%). More tellingly, about 4-in-10 homeowners *strongly* agree that Tarion is accessible (48%), easy to do business with (39%) and listens to needs and concerns (39%) – 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, and continued to increase in 2021 to a level not seen since 2012 (84%).
    - After a significant decline in 2019, Tarion’s performance in terms of *listening to the needs of new homeowners* also rebounded to 2018 levels and sustained this level through 2021 (82%).
    - Overall, Tarion’s performance on the three KPI elements has been trending upward since 2019.
- Similarly, in 2019, opinions of Tarion decreased on all warranty-related service attributes compared to the previous year. In 2020, all ratings rebounded to previous levels and remained at those levels through 2021.
  - In 2021, 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%). About 4-in-10 homeowners *strongly* agree with each statement – strong performance scores.
  - *Making sure that new home builders fulfill their warranty obligations* achieves strong, but somewhat lower ratings overall than other attributes (79% agree, 41% strongly agree).
  - About 8-in-10 homeowners also agree that Tarion *gives buyers confidence in the home buying experience* (82%, 42% strongly agree).
- Again, the latter two items – *gives buyers confidence in the home buying experience* and *making sure that new home builders fulfill their warranty obligations* are areas that Tarion should most focus on, in order to increase overall satisfaction. They are areas of high importance to homeowners, and where Tarion’s performance is lower relative to other attributes.

## Contact with Tarion

- In 2021, 89% of Year 1 homeowners report some contact with Tarion, a slight increase from 2020 (86%).
  - Most of this increase has come from use of the *MyHome portal* and the *Tarion website*, both of which have steadily grown between 2018 and 2021.
  - As a result, *MyHome* has been the main point of contact in 2021 (62% of homeowners), followed by *Tarion's website* (56%), and then the *statutory warranty form* (52%).
- Among homeowners who report contact with Tarion, satisfaction with their overall interactions seemed to rebound in 2020 after a decline the previous year. In 2021, satisfaction declined again to 57% of homeowners being extremely or very satisfied with their interactions.

There continues to be an opportunity to move the satisfaction scores up. Improvements could potentially be achieved by enhancing the ease of use of Tarion's communications materials.

- Overall, *Tarion's website* and *MyHome online service* show strong performance. In each case, the vast majority of respondents (87%-89%) agree that the vehicles are easy to use and understand. However, just over one-third (37%-38%) *strongly* agree, suggesting that there is room to enhance the ease of use of these vehicles. Less emphasis needs to be put on *MyHome* than the website, however, since it is a less important area for homeowners.
- Responses to an open-ended question suggest that other ways to increase satisfaction with Tarion interactions are to *fast-track repairs* and to *improve communication* to better manage expectations or at least inform homeowners of reasons for delays or disruptions.

## 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* (64% of homeowners). This is followed by *closing/occupancy delays* (54%) and then *pre-delivery inspection disruptions* (34%). Closing/occupancy delays have increased substantially since 2020 (from 32% to 54% of homeowners experiencing delays)
- As in 2020, new homeowners are generally very satisfied with the measures that Tarion has taken in response to COVID-19. The vast majority (82%-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 for an inspection. About half of homeowners *strongly* agree with each of these statements (44% to 50%) – robust performance scores.



## 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 and 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 (especially Micro owners). Specifically, Smaller Homeowners:
  - rate Tarion lower than other homeowners on certain KPI elements, specifically on being *accessible* and *easy to do business with* and also, on being *open and transparent*.
  - are least likely to feel that Tarion *helps new homeowners understand their warranty rights and obligations* (especially Micro owners).
  - 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.), especially Micro owners. Among those who have contacted Tarion, Small and Micro Homeowners are least satisfied with their interactions.
- High-Rise and Large Homeowners are most likely to advocate for Tarion, are more likely to have used the contact vehicles (MyHome, the website, statutory warranty form, etc.). 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.
- High-Rise and Large Homeowners (and Medium Homeowners to a lesser degree) are more likely to have been impacted by COVID-19 delays and disruptions. Generally, they rate Tarion's and their builders' responses significantly more favourably than Small and Micro Homeowners.

## The Builder Experience

- In 2021, 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.
- However, since 2020, satisfaction with builders has declined in almost every service area, across all builder segments, except High-Rise Homeowners. High-Rise owner ratings have remained constant (no significant differences) on almost every measure since 2020.
- 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. They are the same items cited as opportunities for Tarion in 2020.

### Builders Performance is Weaker - Areas of Opportunity for Tarion

- **Overall communication effectiveness (45% extremely/very satisfied)**
- **Ability to follow through on commitments (45%)**
- **Ability to instill confidence in work and service (44%)**
- **Overall quality of service and repairs (44%)**
- **Customer service AFTER moving in (42%)**
- **Timeliness of response to service and repair requests (39%)**
- **Experience with new home and builder expectations (29%)**

## Tarion Outreach Opportunities

The opportunities for Tarion to further foster relationships with new homeowners through 2022 are summarized below.

- Tarion’s service attributes that are important to homeowners, but underperform relative to other attributes, are as follows. These should be the focus for improvement initiatives by Tarion.
  - Giving new home buyers confidence in the home buying experience
  - Satisfaction with interactions with Tarion
    - Satisfaction with interactions with Tarion can be enhanced by making Tarion’s *website and MyHome online service even 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)” scores up. Again, less emphasis needs to be put on MyHome than the website, since it is a less important area for homeowners.

There are also hints that advocating to *fast-track repairs and improving communications* may also improve interactions with Tarion overall.

- Monitoring new home builders to *ensure that they fulfill their warranty obligations* (in order to avoid declines in service). Though Tarion performs well in this respect, its score is somewhat lower than for other aspects of helping homeowners with the warranty process.

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

- In terms of the KPI elements that are used to calculate the Service Orientation Index:
  - *Accessibility* continues to be a top strength 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.
  - *Being easy to do business with* has increased over the last two years to a level not seen since 2012. Tarion should ensure that it understands why it is performing well in this area, including any changes it may have made recently that would move this rating, so that they can be better incorporated into Tarion’s operations.
- 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. Approaches to improving relations with smaller homeowners are similar to those required for homeowners at large. Specifically, focus on:
  - helping them understand their warranty rights and obligations
  - making the Tarion website easier to use and understand , advocate to fast-track repairs and keep them informed
  - Maintain accessibility and flexibility (easy to do business with), and ensure transparency.

- Assist the High-Rise homeowner group with their builder experience. They are consistently the homeowners who are least satisfied with their builders. 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, follow-through on commitments, quality of service and repairs, customer service after moving in, and timeliness of response to service and repair requests.
- Ensure that Small and Micro Homeowners understand Tarion’s role and mandate. Smaller homeowners seem more satisfied with their builders than with Tarion, while larger owners have the opposite experience. Is it possible that smaller owners are incorrectly attributing some of the difficulties they may be experiencing to Tarion, that are actually the builder’s responsibility?
- 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 2020 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* (64% of homeowners), followed by *closing/occupancy delays* (54%) and then *pre-delivery inspection disruptions* (34%).

The greatest changes since 2020, are that...

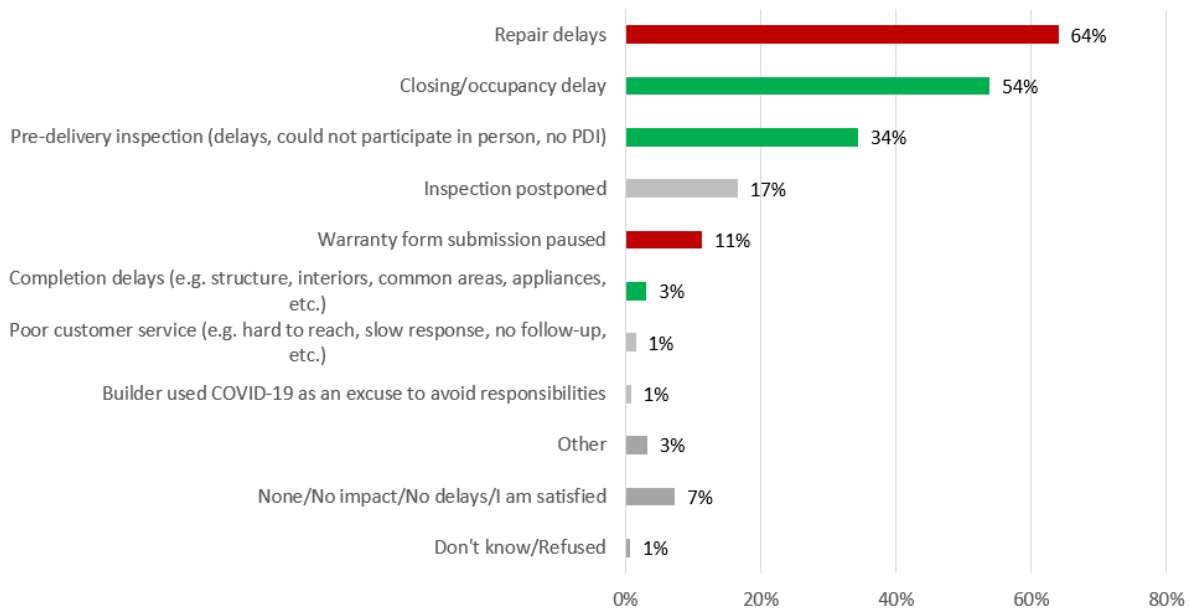
- Closing/occupancy delays have increased substantially (from 32% to 54% of homeowners experiencing delays)
- Pauses in warranty form submissions have decreased (from 19% to 11% experienced).

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

- High-Rise Homeowners are more likely than any others to experience closing/occupancy delays (74% of them) and pre-delivery inspection disruptions (51%)
- Large Homeowners are the ones most likely to experience repair delays (71%).

Problems with pauses in warranty form submissions are felt equally by all builder segments.

Overall, Medium, Small and Micro Homeowners are least likely to have experienced delays or to be otherwise impacted by COVID (12%, 16% and 17% indicate no impact respectively).



Source: Q2. What impact has the COVID-19 outbreak had on your home? (n=7,604)

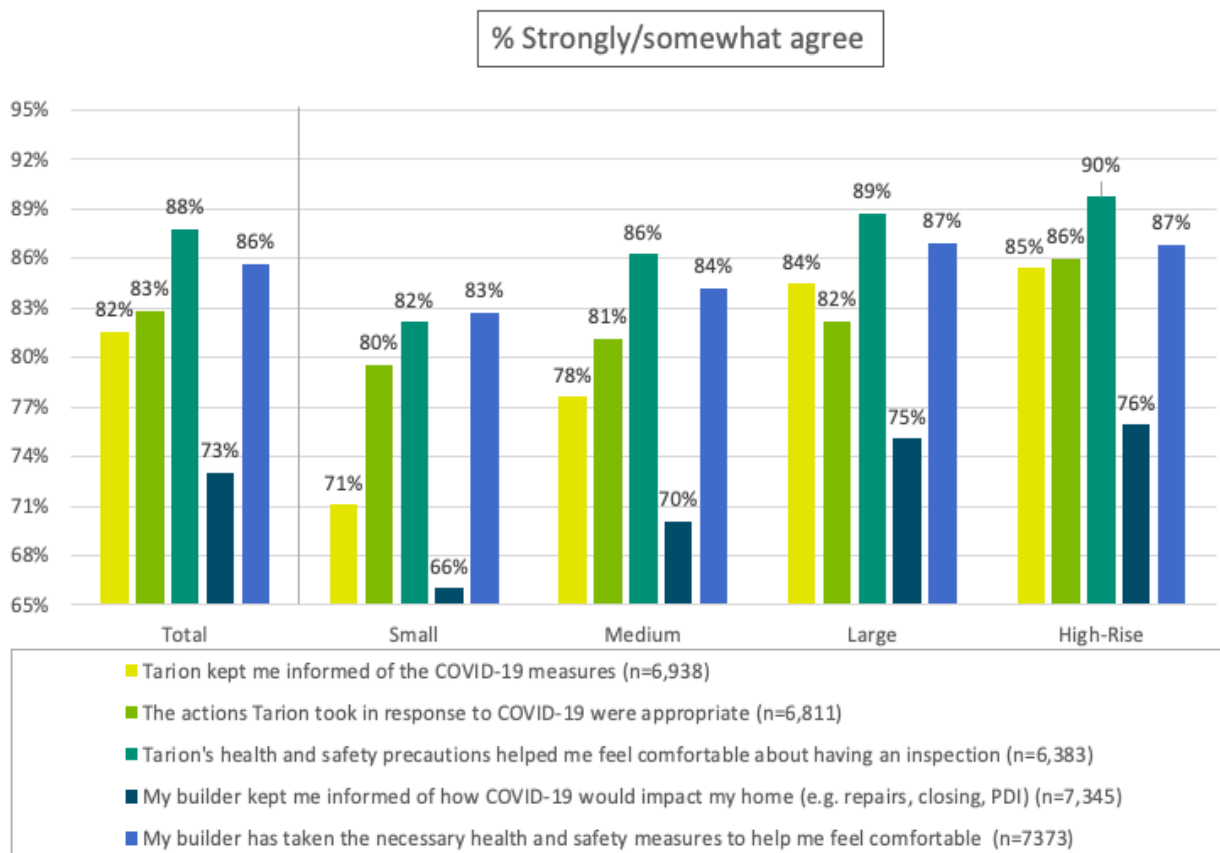
## Reactions to Tarion's Response to COVID-19

New homeowners are generally very satisfied with the measures that Tarion has taken in response to COVID-19. The vast majority (82%-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 for an inspection. More tellingly, about half of homeowners *strongly* agree with each of these statements (44% to 50%) – robust performance scores.

Tarion is perceived to perform better than the builders at *keeping homeowners informed* of COVID-19 disruptions – 82% and 73% of owners agree that Tarion and the builders have kept them informed, respectively. The builders' health and safety precautions are rated as being comparable to Tarion's measures.

These findings are consistent with 2020.

Generally, High-Rise and Large Homeowners (and Medium Homeowners to a lesser degree) felt significantly *better informed* about COVID-19 disruptions by both Tarion and their builders, and were *more comfortable with the health and safety measures* taken by both parties than Small and Micro Homeowners.



# Home Owner Impressions of Tarion

## Overall Impression of Tarion

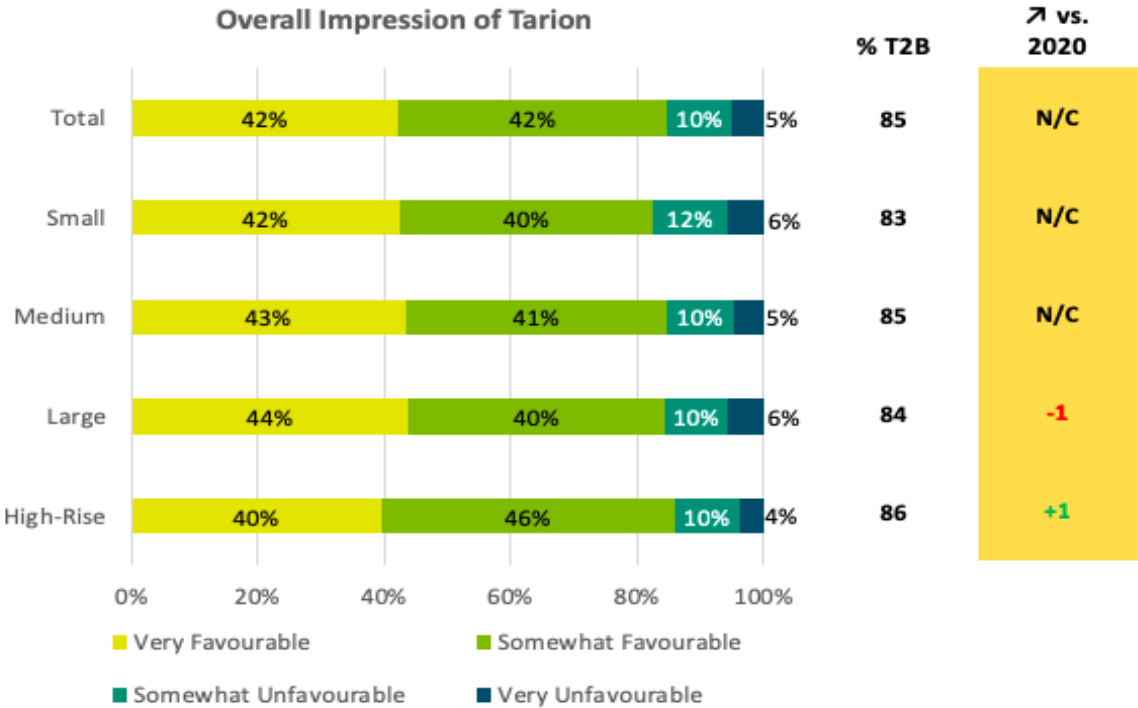
A key overall impression measure in the survey assesses how favourably homeowners view Tarion.

After a dip in 2019, ratings of Tarion increased in 2020 and have sustained through 2021.

In 2021, the vast majority of Year 1 homeowners (85%) have a favourable impression, and more tellingly, 42% have a *very favourable* impression – a strong score.

These scores are unchanged from 2020 scores overall (85% favourable, 41% very favourable) and across all builder segments (Small, Medium, etc.).

In 2021, all types of builders have an equally favourable impression of Tarion.



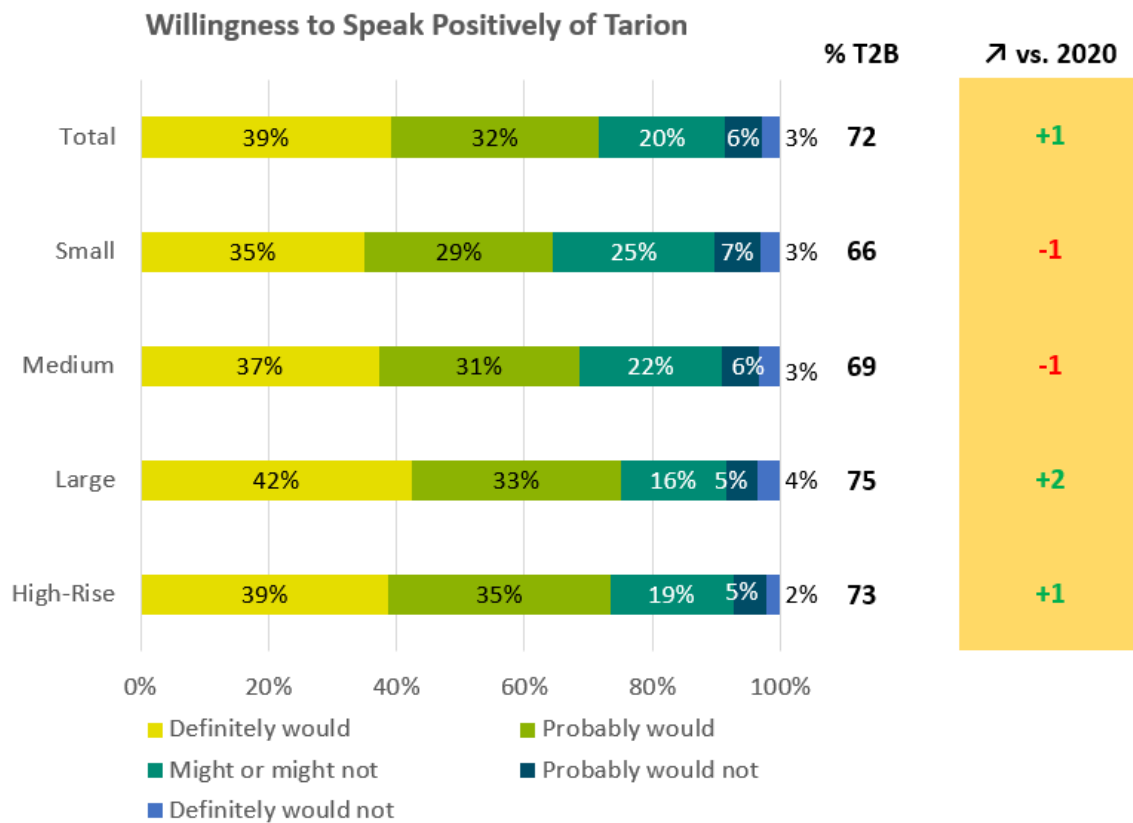
Source: A12. Overall, is your impression of Tarion... (n=6,941)



## 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 and has remained constant through 2021 overall (72% would definitely/probably advocate for Tarion) and across all builder segments.

As in 2019 and 2020, Smaller Homeowners are least willing to advocate for Tarion, especially Micro owners (62% definitely/probably would), and High-Rise and Larger Homeowners are most likely to advocate for the company.



**Source: A13.** If asked by potential new homeowners, how likely would you be to say positive things about Tarion? (n=7,604)

## 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 and have remained at those levels through 2021. There are no significant differences in ratings between 2020 and 2021.

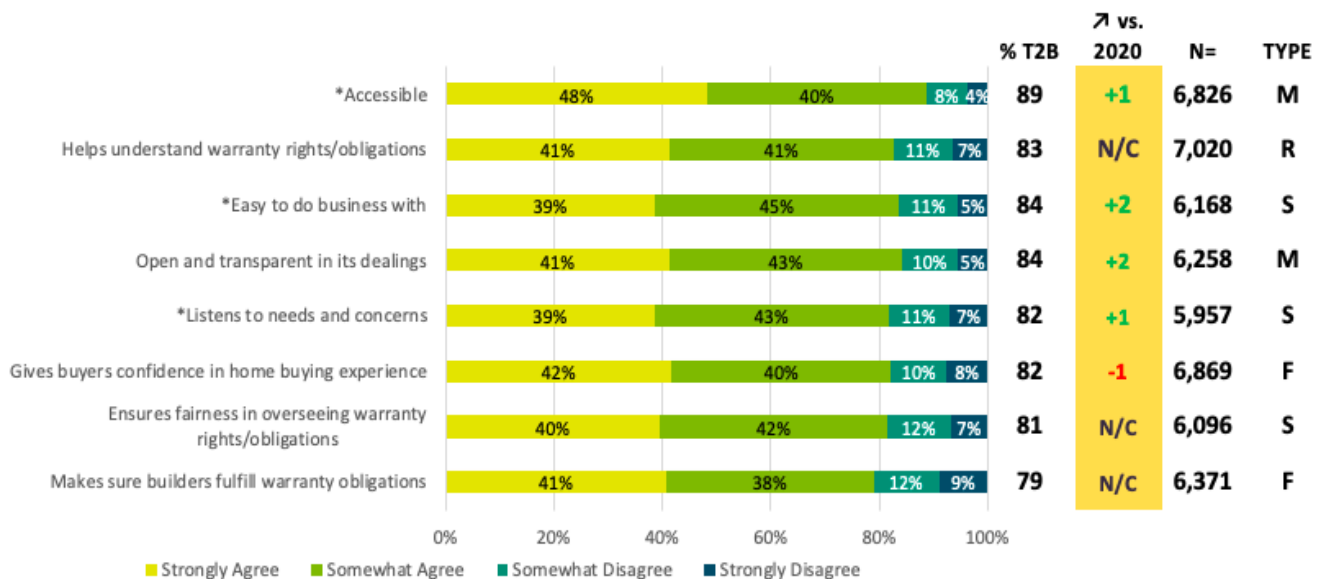
Again this year, homeowners' specific impressions of Tarion are positive, with roughly 8-in-10 agreeing that Tarion delivers on each of the attributes listed below (79%-89%). About 4-in-10 homeowners *strongly* agree with each statement – strong performance scores. This includes opinions on the three Key Performance Indicator criteria: *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 (89%) 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.

The items which require the most attention from Tarion are as follows. They are areas of high importance to homeowners, and where Tarion's performance is lower relative to other attributes.

- Making sure that builders fulfill warranty obligations
- Giving buyers confidence in the home buying experience.

*Helping homeowners understand warranty rights and obligations* is a strength of Tarion that it can capitalize on. It is an area that is of importance to homeowners and one which Tarion is rated highly on.

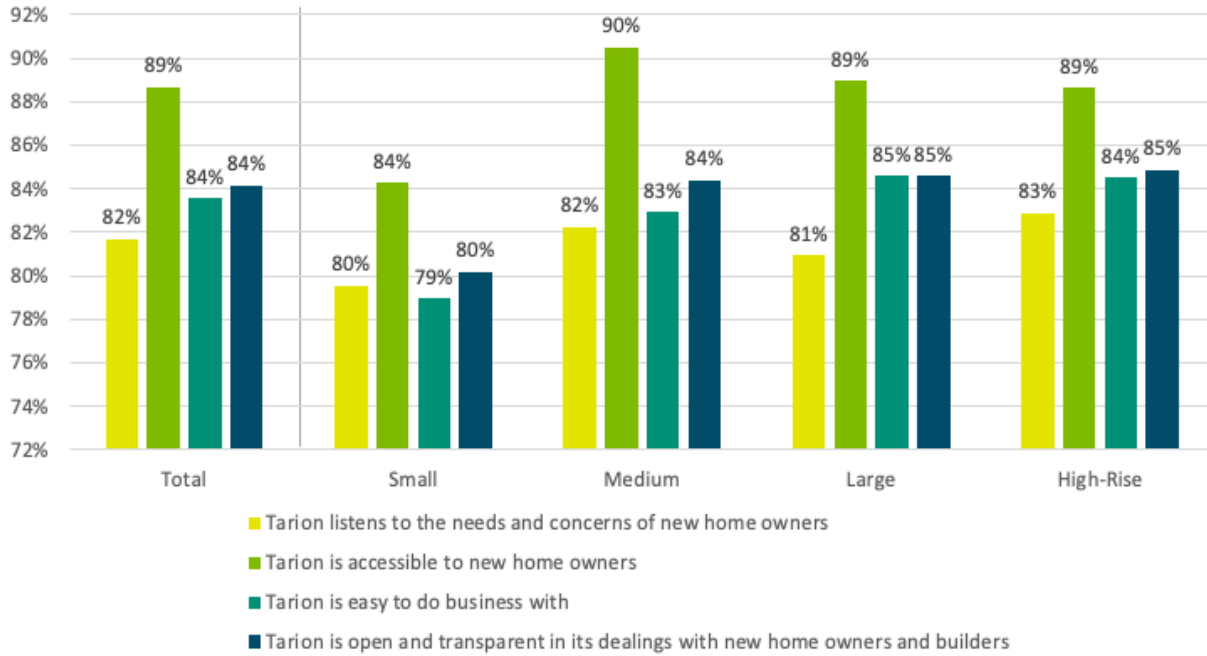


A10-11. Based on your impressions of Tarion, to what extent do you agree or disagree...?

\*\* R = Relative Strengths (High Performance / High Importance)  
 M = Maintenance Items (High Performance / Low Importance)  
 S = Secondary Issues (Low Performance / Low Importance)  
 F = Key Focus (Low Performance / High Importance)

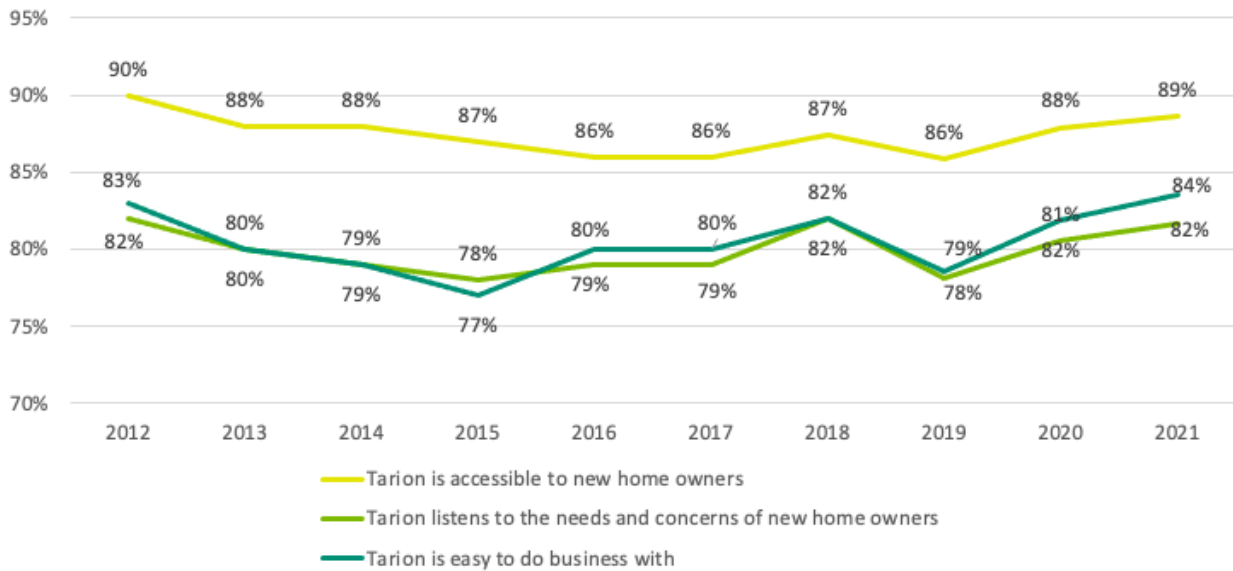
Homeowners in all builder categories are significantly more likely to agree that Tarion's greatest strength is its *accessibility* compared to other attributes.

Small Homeowners rate Tarion lower than other homeowners on most attributes, specifically on being *accessible, easy to do business with and open and transparent*.



Overall, Tarion's performance on the three KPI's has been trending upward since 2019.

- Tarion's performance with regard to *accessibility to new homeowners* has remained fairly constant over time, though it has seemed to trend upwards since 2019.
- After a significant decline in 2019, the rating of being *easy to do business with* rebounded in 2020, and continued to increase in 2021 to a level not seen since 2012.
- After a significant decline in 2019, Tarion's performance in terms of *listening to the needs of new homeowners* also rebounded to 2018 levels and sustained this level through 2021.

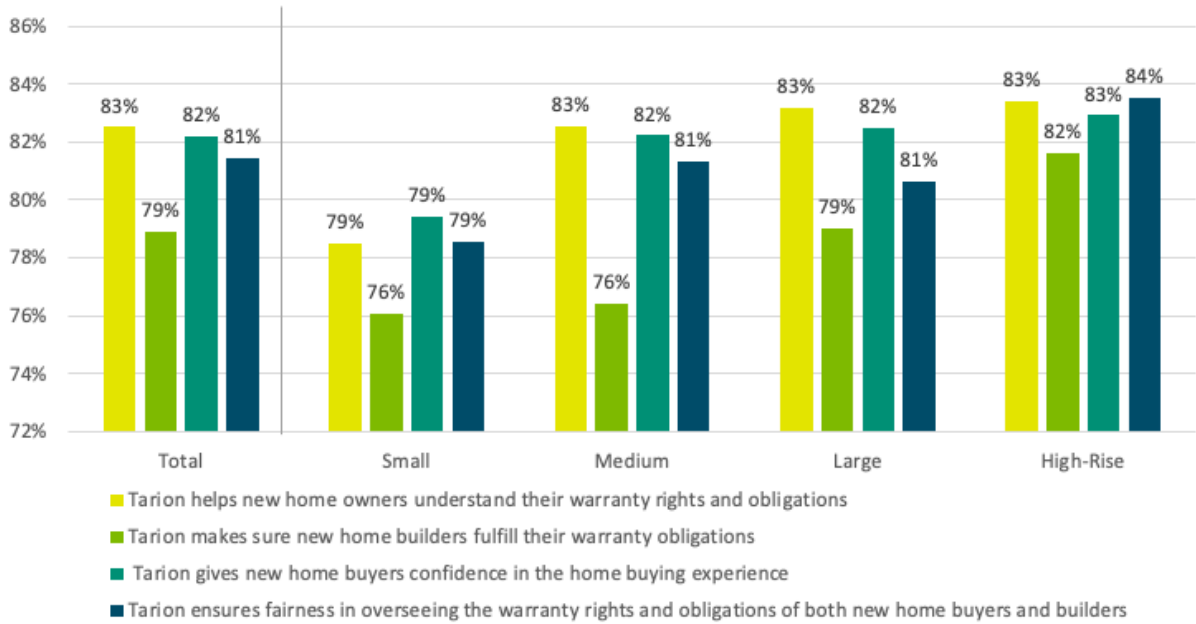


Source: A10. To what extent do you agree or disagree that...(n=5,957 to 6,826)

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

Small Homeowners (Micro owners in particular) are least likely to feel that Tarion *helps new homeowners understand their warranty rights and obligations*.

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



# Home Owner Interactions with Tarion

## Nature of Contact and Engagement Levels with Tarion

In 2021, 89% of Year 1 homeowners report some contact with Tarion – a slight increase from 2020 (86%).

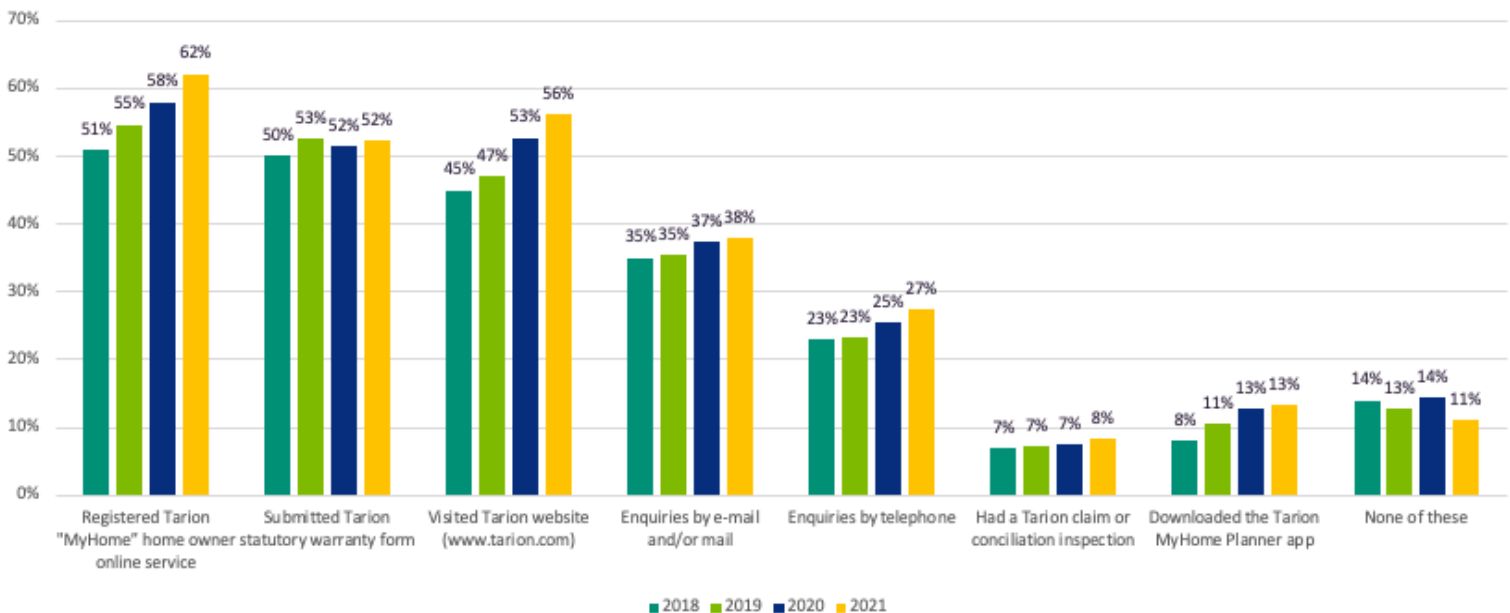
Most of this increase has come from use of the *MyHome portal* and the *Tarion website*, both of which have steadily grown since 2018.

As a result, *MyHome* has been the main point of contact in 2021 (62% of homeowners), followed by *Tarion’s website* (56%), and then the *statutory warranty form* (52%). These have been the three main sources of contact since 2018.

The *Tarion MyHome Planner app*, introduced in 2017, had seen steady increases in use through 2020. Use flattened in 2021, when 13% of homeowners used the app (same as in 2020).

Enquiries by email and phone have crept up slightly over time.

High-Rise, Large and Medium Homeowners are more likely to have used the main contact vehicles, while Micro Homeowners are least likely to have done so. Overall, 11% of homeowners have not had contact with Tarion via any of the avenues measured, and these are more likely to be concentrated among Small and Micro Homeowners (21% and 26% not used any respectively).



A1. What contact, if any, have you had with Tarion? (N=7,604)

## Satisfaction with Tarion Interactions

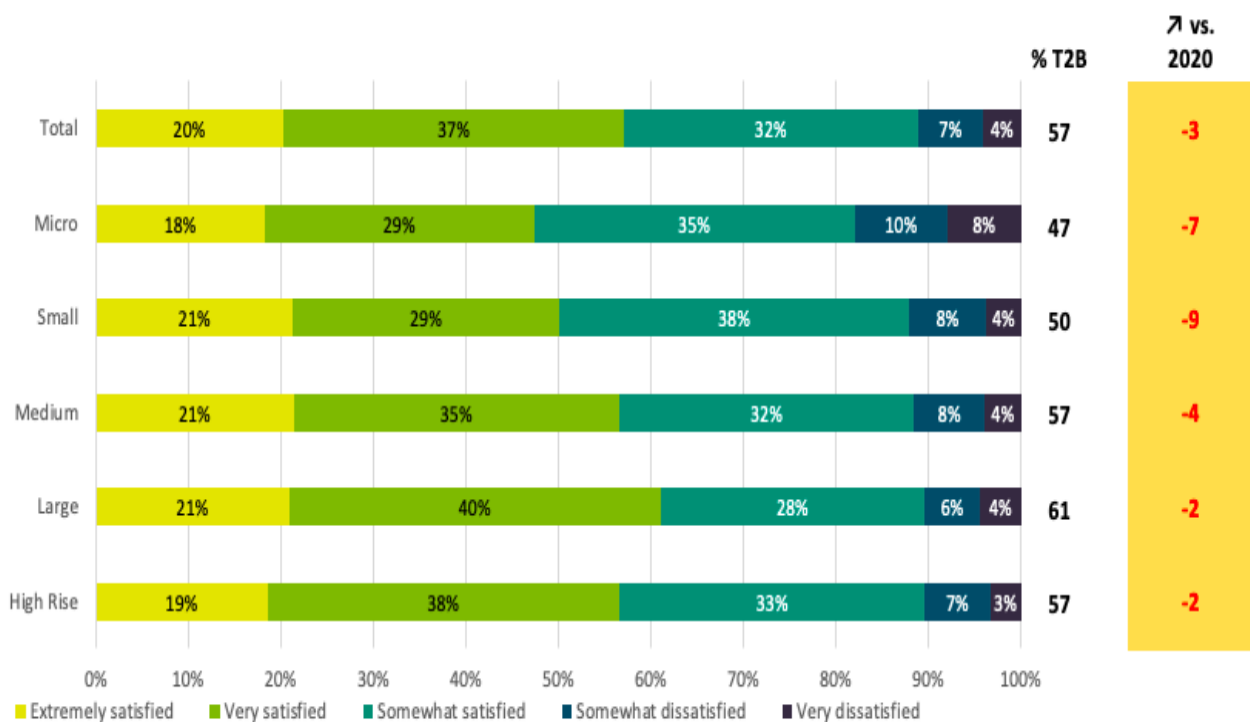
In 2020, satisfaction with Tarion interactions seemed to rebound after a decline in 2019. In 2021, satisfaction declined again overall and across all builder segments – particularly Micro, Small and Medium Homeowners.

Overall, 57% of homeowners who interacted with Tarion in 2021 (via MyHome, the website, the statutory warranty form, telephone, email, or a claim/conciliation inspection) are extremely or very satisfied with their interactions.

As in 2019 and 2020, Large Homeowners report slightly higher satisfaction (61%) compared to other builder categories. Small and Micro Homeowners are least satisfied with their interactions.

In all cases, there continues to be an opportunity to move the satisfaction scores up. An open-ended question that was added in 2021 hints that the main ways to do this are to:

- Advocate to fast-track the repairs – 8% of all open-ended comments involve “Still waiting for repairs/repairs are not complete/takes a long time”
- Improve communication to better manage expectations or at least inform homeowners of reasons for delays or disruptions – 7% of comments involve “poor communication”.



A1A. How satisfied were you with your interactions with Tarion? @ A1 (N=7,604)

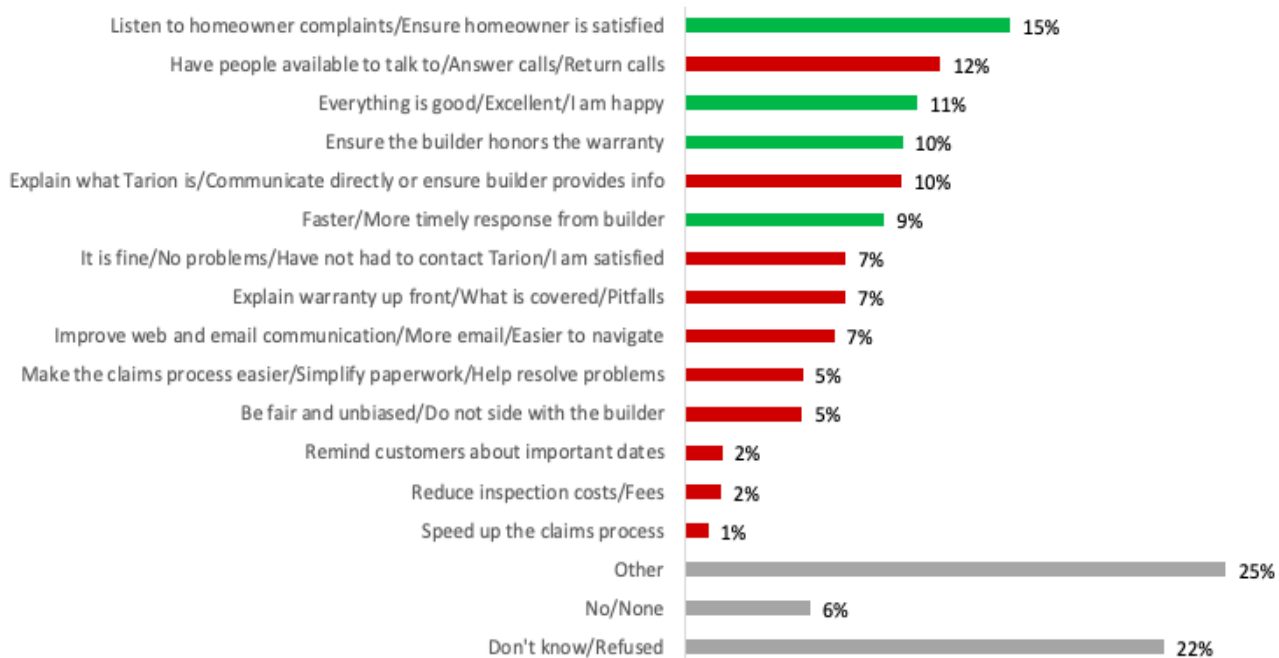
## How Tarion Can Better Serve Homeowners' Needs

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

Comments that are mentioned more often in 2021 than in the previous year are:

- Listen to homeowner complaints/ensure they are satisfied
- Ensure the builder honours the warranty
- Faster/more timely response from the builder.

Mentions of simplifying the claims process have declined from 10% to 5% in the past year.

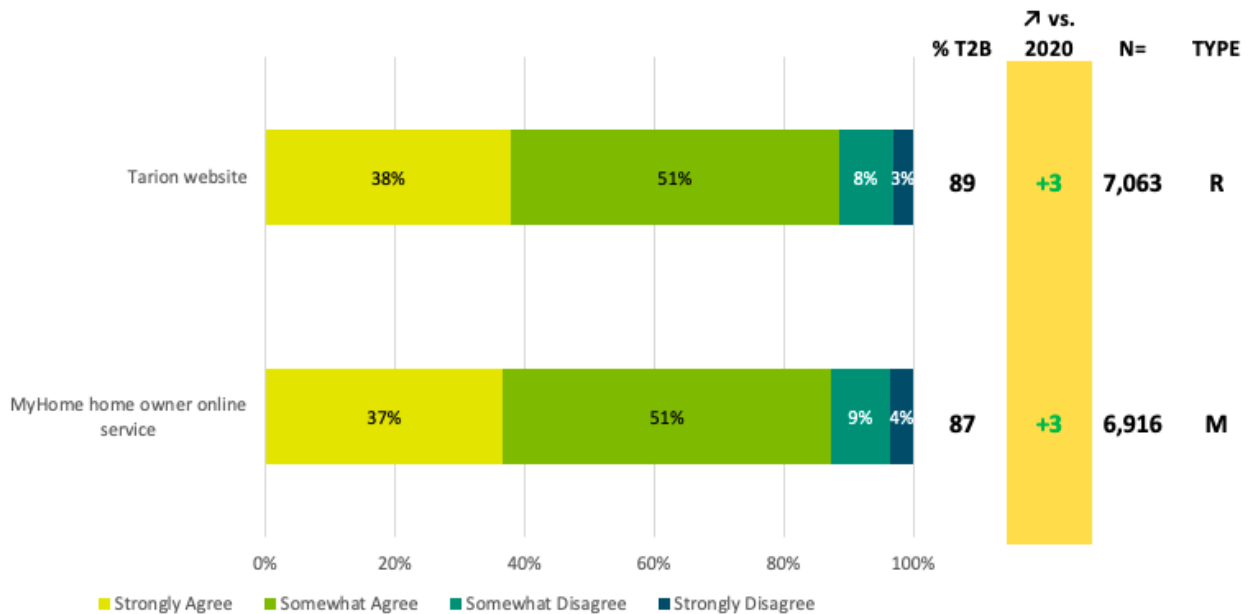


Source: A14. Please describe how Tarion can better serve the needs of new homeowners. (n=7,604)



## Perceptions of Tarion Communication Materials

The vast majority of respondents (87%-89%) at least somewhat agree that *Tarion's website* and *MyHome online service* are easy to use and understand. Just over one-third (37%-38%) *strongly* agree, suggesting that there continues to be room to enhance the ease of use of these vehicles despite some improvement since 2020. Less emphasis needs to be put on MyHome than the website, however, since it is a less important area for homeowners.



A9C-D. To what extent do you agree or disagree with the following Tarion items are “easy to use and understand”?

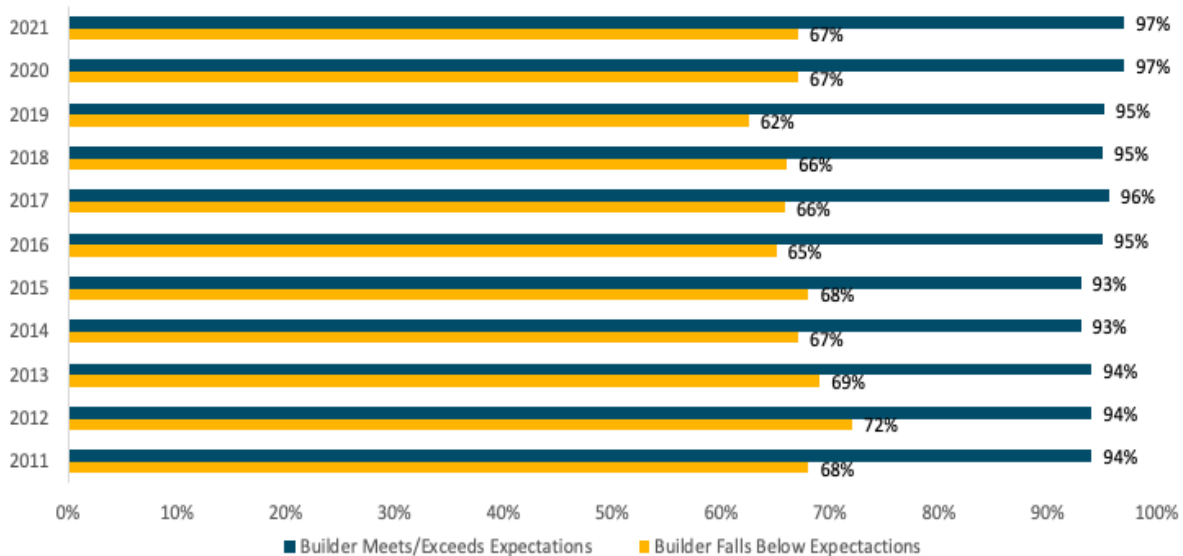
\*\* R = Relative Strengths (High Performance / High Importance)  
 M = Maintenance Items (High Performance / Low Importance)

## 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. The following graph shows the strength of this relationship in each year.

When builders have met or exceeded homeowner expectations, homeowners are more likely to have a favourable view of Tarion (blue bars). Similarly, when builders do not meet expectations, homeowners are less likely to have a favourable impression of Tarion (yellow bars).

In 2021, 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 2011.



A12. Overall, is your impression of Tarion... (N=6,941)

## APPENDIX

### 2021 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](http://fmrch.com/tarion1) and typing in your unique ID: #####.

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

ਇਸ ਲਿੰਕ [fmrch.com/tarion1](http://fmrch.com/tarion1) ਤੇ ਜਾ ਕੇ ਅਤੇ ਆਪਣੀ ਅਨੁਨੀ ਪਛਾਣ ਸੰਖਿਆ ##### ਟਾਈਪ ਕਰਕੇ ਸਰਵੇਖਣ ਨੂੰ ਆਨਲਾਈਨ ਪੂਰਾ ਕਰੋ।

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

进入 [fmrch.com/tarion1](http://fmrch.com/tarion1) 并输入您的唯一 ID 号 #####，完成在线调查

## Covid-19: Understanding the Impact

COVID-19 and the evolving public health measures in response to it resulted in significant disruptions in the new home building industry in 2020 and 2021. In response, Tarion continued to take various precautionary measures and adjust our operations to ensure the health and safety of our employees as well as homeowners, builders, and the greater community. To help us assess the impact of COVID-19 and our operational measures and communications, 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 did the COVID-19 outbreak have 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

A1aa. Why did you rate your interactions with Tarion the way you did?  
(Please feel free to attach additional pages if needed.)

---

---

---

---

---

---

---

---

---

---

## 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
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"/>

## 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	<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...
<input type="radio"/> Very Favourable <input type="radio"/> Somewhat Favourable <input type="radio"/> Somewhat Unfavourable <input type="radio"/> Very Unfavourable <input type="radio"/> 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?
<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

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

---



---



---



---



---



---



---

## Part B: Understanding Your Experience with Your Builder

For each of the following questions, please indicate whether you were extremely satisfied, very satisfied, somewhat satisfied, somewhat dissatisfied, or very dissatisfied. Please check only one circle per line.

### Agreement of Purchase and Sale (APS)

B1. Please rate your satisfaction with your builder on:	Extremely Satisfied	Very Satisfied	Somewhat Satisfied	Somewhat Dissatisfied	Very Dissatisfied	Not Applicable
a) Explanation(s) of the Agreement of Purchase & Sale (APS)	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
b) Responses to your questions or concerns about the APS	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
c) Ability to deliver the home as agreed to in the APS	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

### Service Prior to Moving In

B2. Please rate your satisfaction with your builder on:						
a) Ongoing communication before moving into your new home	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
b) Ability to follow through on commitments	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
c) Explanation of the Tarion Homeowner Information Package (HIP)	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
c) Explanation of the warranty on your new home & your role & obligations under the warranty	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

### Pre-Delivery Inspection (PDI)

B3. Please rate your satisfaction with your builder on:	Extremely Satisfied	Very Satisfied	Somewhat Satisfied	Somewhat Dissatisfied	Very Dissatisfied	Not Applicable
a) Amount of time scheduled for & pace of your PDI	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
b) Accuracy in recording all follow-up items identified during your PDI	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
c) Explanation of how your home's systems & equipment function (e.g. windows, heating, A/C)	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
d) Overall thoroughness of your PDI	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

B4. Overall, how satisfied were you with your builder's customer service BEFORE 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

B4i. Why did you rate your satisfaction with your builder's customer service BEFORE you moved into your new home the way you did? Please provide as much detail as possible.

---



---



---



---



---

	Yes	No
B4a. Did you close and/or take occupancy of your new home on the originally scheduled or properly extended date?	<input type="radio"/>	<input type="radio"/>

### Home/Condominium Readiness

B5. Please rate your satisfaction with the timely completion of your home's or condominium unit's/building's...	Extremely Satisfied	Very Satisfied	Somewhat Satisfied	Somewhat Dissatisfied	Very Dissatisfied	Not Applicable
a) Interior	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
b) Exterior	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
c) Landscaping or driveway	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
d) CONDO OWNER: Your building's common areas (e.g. lobby, pool, fitness centre)	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

### 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?**  
 Extremely Satisfied     Very Satisfied     Somewhat Satisfied     Somewhat Dissatisfied     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?**  
 Extremely Satisfied     Very Satisfied     Somewhat Satisfied     Somewhat Dissatisfied     Very Dissatisfied

**B11. How well did your experience with your new home and your builder meet your expectations?**  
 Well above expectations     Above expectations     Met expectations     Below expectations     Well below expectations

**B12. How likely would you be to recommend your builder to friends or family members thinking of buying a new home?**  
 Definitely would     Probably would     Might or might not     Probably would not     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).

---

---

---

---

---

---

---

---

---

---

## Part C: About You and Your Home

	Yes	No
C4. Is this the first newly constructed home you have ever purchased from a new home builder?	<input type="radio"/>	<input type="radio"/>

	Please Specify	Prefer not to say
C5. What language do you most often speak at home?	-----	<input type="radio"/>

## 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 5th, 2021.**

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

