

2022 Builder Impressions Survey

Executive Summary and Detailed Findings

Prepared for: Tarion

24 February 2023

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Introduction

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

Why the Need for Research?

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

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

Research Approach

Forum Research used an existing questionnaire provided by Tarion, and modified it to include topical issues.

In 2022, Forum Research invited 1,464 home builders to complete the survey. Interviews were completed with 220 key personnel from a list of registered new home builders in Ontario, provided by Tarion that had at least one possession in a year. All surveys were completed between September 7th to November 3rd, 2022.

The response rate was 15% and the average survey length was about 20 minutes. The breakdown of completes among possession categories and margin of error was:

Builder Size	Sample	Completes	Finite Correction MoE (%)	Completion Rate
Micro	814	105	8.33	13%
Small	357	54	11.32	15%
Medium	192	43	11.6	22%
Large	60	12	22.63	20%
Highrise	41	6	34.15	15%
2022	1,464	220	5.61	15%

At a 95% level of confidence, the margin of error on the total sample size of 220 is +/- 5.61% with Finite Population Correction. Results for sub-samples by each of the possession categories have a much higher margin of error. The report presents the survey findings in aggregate only, respecting all assurances of confidentiality and anonymity promised to individual interviewees.

In 2022, Tarion requested to provide additional analysis and commentary by using predetermined builder Zones. Due to a small sample size of certain Zones, small sample sized Zones were collapsed into a larger category to ensure that there are at least 20 completes per subcategory. The breakdown of completes among Zone categories was:

	Total	ZONE 1	ZONE 2/4	ZONE 3	ZONE 5	ZONE 6/8/9/10 /11	ZONE 7	ZONE 12/13
Completion Rate	15%	14%	22%	20%	11%	15%	13%	14%
Completes	220	28	21	58	22	27	41	23
Sample	1,454*	204	94	292	209	177	318	160

* 10 builders were categorized in multiple Zones, excluded from sample counts.

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 T2B (e.g., somewhat dissatisfied + very dissatisfied)

Note: Use caution when assessing data reported by Zones and for Large/High-Rise Builders, as any conclusions made with small number of completes could be misleading due to large Sampling Error.

Multiple Response Bar Charts color scheme:
*Green denotes an increase from the previous year,
 Red denotes a decrease from the previous year,
 Blue denotes a new item in the chart,
 Grey denotes other/unchanged items in the chart.*

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

Executive Summary

This report highlights the results from Tarion's 2022 Builder Impressions Survey of 220 telephone interviews with key personnel at registered builders in Ontario.

The survey objectives were to:

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

Key findings and perspectives are presented in this Executive Summary.

New Residential Building Activity – Company Outlook

Overall, the **majority of respondents are optimistic** about their own companies' prospects. That is, 60% anticipate that their new residential building activity will increase or remain the same in the next 12 months.

- One-in-four builders (24%) are predicting an *increase* in activity, with medium builders least likely to predict an increase 16%, while 83% high-rise builders predicted an increase.

Challenges

Survey respondents were given a list of issues and asked if their business had experienced any of them. Virtually all builders (96%) have faced at least one of the issues listed and most have experienced multiple problems.

- The most common issue, experienced by almost all builders is **material shortages** (82% of builders).
- The next-most common issue, experienced by 69% of builders is **shortage of trades/skilled labour**.
- Large and high-rise builders (50%) appear less likely to have experienced **problems with meeting closing dates** than small and medium builders (60%).

Main Challenge

In 2022, open-ended responses regarding the biggest challenge facing builders over the next 12 months indicate that...

- The **lack of demand/adverse market conditions** is the greatest challenge faced by the builders this year emerging as a brand-new entry in the list (21%).
- **Availability of skilled labour/tradespeople** continues to be among the biggest challenges, as it has been since 2016 (20% of builders).
- **Cash flow/money/high interest rates** has also turned up as a financial challenge for the builders this year (19%).

Other items that have been main challenges in the past have declined significantly in importance. Specifically, builders are less likely to see the following as challenges this year than they were in 2021:

- Availability of building supplies/materials/products (9%)
- Bureaucracy/development approval/building codes (8%).

Builders' Overall Impressions of Tarion

Impressions of Tarion on various measures largely stabilized after declining from as far back as 2017, and this stabilization has mostly been sustained until 2021; however,

- **Satisfaction with Tarion's performance** plunged by 9% in 2022. Under third of all builders are *extremely or very satisfied* with Tarion's performance (31%) with high-rise builders most likely to be *extremely or very satisfied* at 33%, while large builders were least likely satisfied of all builders at 25%.
- After a significant decline in 2019, perceptions of Tarion's **commitment to customer service** remained steady in 2020-2021 years. This year, 83% of builders indicated that Tarion's commitment to customer service has improved or stayed the same. More tellingly, 1-in-3 builders (24%) believe the Tarion's customer service has *improved representing a 10% decrease from 2021 base year*.
- Builders' views of their **relationship with Tarion** continue to decline and have decreased by 8% from 2021 (60%) that said, 52% of builders feel that their relationship with Tarion is *excellent or very good*. There continues to be room for Tarion to strengthen its relationship with builders across all categories.
- 54% of builders are **likely to advocate** for Tarion, a 7% fall from 2021 (61%). 19% indicating that they would *definitely* say positive things about the organization, a 12% decrease from 2021 (30%).
- Builders' **personal opinions of Tarion** have been **trending downward between 2017 and 2022**. In 2022, ratings have declined across all possession categories, particularly the larger ones (less so among Micro + Small builders). Overall, in 2022, about two-thirds of builders overall (63%) have **favourable impressions** of Tarion based on their personal experiences (16% *very favourable*), and this is relatively consistent across builder categories.

- 31% of builders indicated that they **had issues with Tarion or in general have major concerns** about recent changes that Tarion had implemented. Notably more of the medium and large builder groups have voiced their concerns than their peers.

Differences in perceptions of Tarion among builder possession categories are as follows.

- In terms of changes in impressions between 2021 and 2022:
 - **High-Rise builder** impressions of Tarion seem to have **declined** for a second year in a row. It is not uncommon to see large fluctuations and changes in behaviour in small samples such as this. Still, there are consistent declines in High-Rise builder ratings since 2021.
 - **Large builder** perceptions seem to show a pattern of **improved** perceptions since 2021 (again, the small sample size means that these results should be viewed with some caution).
 - Perceptions of Tarion among **Small + Micro and Medium volume builders** have generally remained **fairly stable** since 2021 (though Medium builders show a significant decrease on the overall satisfaction with Tarion measure).
- In looking at **2022** performance alone, impressions of Tarion are **relatively consistent** across all builder possession categories, as indicated above.
- In terms of specific impressions of Tarion's services:
 - Medium and large volume builders seem *more* likely to say that Tarion is easy to do business with, and Tarion encourages builders to provide homeowners with good customer service.
 - Micro and small builders seem more likely to think that Tarion listens to the needs and concerns of builders compared to medium and large builders.

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

- Encourages builders to provide good customer service (93% strongly/somewhat agree)
- Educates builders about warranty/construction matters (91% strongly/somewhat)
- Stakeholder Relations Department provides useful information, tools, and advice (87% strongly/somewhat agree)

Builder Outreach Opportunities

The research indicates the following opportunities for Tarion to increase satisfaction and further foster relationships with builders throughout 2022. Many of the opportunities are similar to those seen in 2021.

- **Improve representative accessibility and response times** – This continues to be a weakness of Tarion’s that consistently arises in builder ratings and comments, and is a comparatively easy change that Tarion can make to strengthen relationships.

Improves the way it interacts and communicates with builders is among Tarion’s specific performance attributes that receives the lowest ratings by builders, and the one that has experienced the greatest drop since 2021. When builder comments were solicited, communication issues were consistently a main concern and a main area of improvement that builders are seeking.

Specifically, they complain that Tarion is hard to reach, doesn’t answer phone calls, doesn’t return calls or is slow to call back. They want Tarion to be more available and respond faster. Some suggestions for implementing changes are:

- Ensure that **sufficient lines or representatives** are available to take calls, so that callers are not left with busy or unanswered lines.
- **Move callers through the automated system** quickly by ensuring that: a) only one call is needed to connect to the automated menu, b) they can skip through instructions (i.e., they are not required to listen to the full instruction before proceeding), and c) relevant menu categories are in place that triage callers through the system as quickly and with the fewest steps possible. The more prompts and time required to move through the system, the more callers will feel under-served, especially if the end result is that they do not reach a person right away.
- **Establish goals for callback times** and evaluate staff on reaching them (e.g., voicemails must be returned within 3 hours). **Establish firm times during the initial conversation**, that are convenient for the builder, for Tarion to follow up on next steps in resolving an issue, and continue to ensure follow through on those callbacks. Have the call centre telephone system set up to **flag callback times**.

- **Continue efforts to work towards a more balanced, consistent, and fair warranty process** – It appears that Tarion may have made in-roads in this area: in open-ended comments, a balanced consistent warranty process has declined over time as an item needing improvement. Still, when builder comments were solicited in 2022, Tarion’s warranty/conciliation process continued to be cited as a top concern and a top area of improvement. Specifically, there is a consistently cited perception that Tarion is biased and favours homeowners over builders. Further, *does a good job resolving warranty disputes* and *makes fair and impartial decisions* are among the lowest-rated attributes in a given list (36% and 35% of builders disagree respectively that these statements describe Tarion).

Specific changes that builders would like to see are: decisions that are more consistent and fairer to the builder; warranty standards that are consistent and fair (builders feel that the standards keep changing and becoming harder for them); and, simpler, easier-to-understand warranties, with clear guidelines as to what is covered (guidelines that are less subjective and left to interpretation).

- **Reduce bureaucracy** – In 2022, a new issue that has emerged in solicited comments, is that Tarion is too bureaucratic, too large and that the process is too hard/complicated/inefficient/slow. It makes Tarion difficult to do business with. *Easy to do business with* is among the lowest-rated attributes in a given list (41% disagree). At the same time, bureaucracy/development approval/building codes has emerged as an important industry challenge for the first time. Builders want Tarion’s process to be simplified, more efficient and faster. What they mean by “the process” and how it can be improved requires further, more in-depth investigation.
- **Strengthen efforts to ensure First Call Resolution (FCR)** – One of the top concerns cited by builders when asked, was that Tarion doesn’t provide help/doesn’t answer questions. *Listens to needs/concerns of builders* continues to be among the lowest-rated attributes in a given list (41% disagree). When comments were solicited from builders, a secondary issue that emerged is that reps are unhelpful/unknowledgeable/uncaring/don’t resolve problems/don’t answer questions or provide information. They want reps better equipped with information to enable them to answer questions and resolve problems in a timely manner. This merits attention from Tarion since problem resolution and FCR are areas that have consistently been shown to be key drivers of satisfaction with contacts/calls to a service provider. That is, satisfaction with the contact and company is much greater if problems are resolved on the customer’s first call to the company. Satisfaction declines with the difficulty/number of contacts required to have the issue resolved.

As previously mentioned in earlier years, there are a number of ways to facilitate FCR such as: **empowering telephone staff** to resolve builder issues in relatively straightforward, standardized areas (e.g., issuing credits, removing late fees, scheduling work), having staff offer to **transfer the call to a supervisor or a specialist** for resolution when they have difficulty resolving an issue on the first call (e.g., transferring bill problems to the accounting department), **managing expectations** when delays in problem resolution are anticipated by informing builders of how long the delay will be and the reasons for it, and **implementing a triage system** for prioritizing trouble calls that need to be dealt with more quickly.

- **Advocate for builders on their current key challenges** – Specifically on their primary issues of the:
 - Availability of building supplies/materials, brought on by the supply chain crisis;
 - Availability of skilled labour/tradespeople, and;
 - Bureaucracy/development approval/building codes.

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

Detailed Findings

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

The third section examines builders’ impressions of Tarion, including overall performance and impression measures. The fourth includes builders’ suggestions for improvements Tarion could consider. The fifth section provides feedback on Tarion’s channels of communication.

Industry Outlook

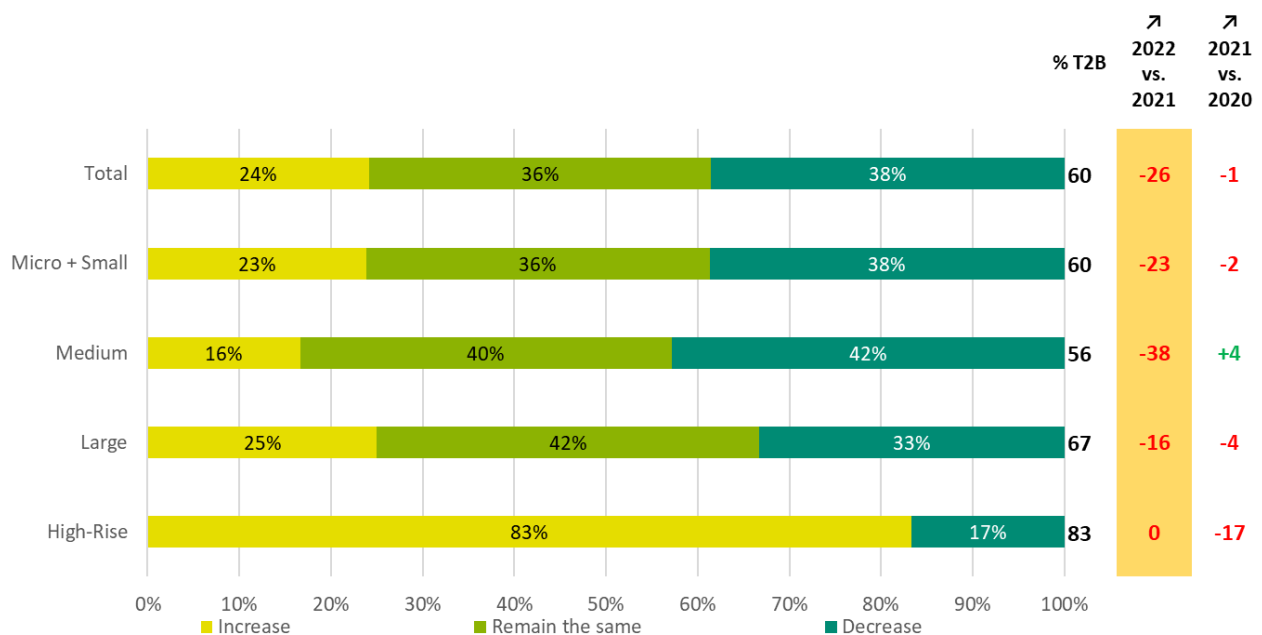
The survey began with a few short questions to help set builders’ impressions of Tarion in the broader context of their views of what’s happening in the new residential construction market overall and their own companies.

New Residential Building Activity – Company Outlook

Overall, the majority of respondents are optimistic about their own companies’ prospects, however with a significant decrease from 2021 across the board. 60% anticipate that their new residential building activity will increase or remain the same in the next 12 months – a significant drop from 2021 (86%).

Nearly one-in-five builders (24%) are predicting an *increase* in activity and this is consistent across builder types, also a significant decrease from 2021 (42%).

Optimism from medium-sized builders saw the largest decrease of 38% from 2021 levels, when compared to other builders.



Source: C2. Also in the next 12 months, would you say [YOUR] new residential building activity will increase, remain the same, or decrease? (n=220)

Builders Challenges

Core Challenges

Builders were asked an open-ended question regarding the biggest challenge facing their companies over the next 12 months.

In 2022...

- **Lack of demand caused by market conditions** was the greatest challenge reported by builders at 21%.
- **Availability of skilled labour/tradespeople** continues to be among the biggest challenges, as it has been since 2016.
- **Financial challenges** emerge as a significant challenge in 2022, and saw the largest increase compared to previous years.

These are the three main issues or challenges that Tarion should be aware of as it creates strategies to strengthen relationships with builders. In 2022, items that have declined significantly in importance are:

- The availability of building supplies/materials
- Bureaucracy/Development approval/building codes
- Increasing home/land costs (which became more of an issue in 2021, and has now returned to previous levels)

Biggest Change]	2022 %	2021 %	2021 %	2019 %	2018 %	2017 %	2016 %
Not enough demand/Adverse market conditions/Hard to find buyers/High buyer expectations	21	-	-	-	-	-	-
Availability of skilled labour/tradespeople	20	20	21	31	23	31	31
Financing/financial challenges	19	2	2	5	10	8	2
Availability of building supplies/Materials/Products	8	34	20	-	-	-	-
Bureaucracy/Development approval/Building codes	8	16	4	-	-	-	-
Increasing home/land costs/staying under budget	5	9	16	6	4	4	6
Unaffordable to customers/Lack of financing/Can't make down payment/Can't get mortgage	5	-	-	-	-	-	-
Meeting deadlines/Closing on time	4	5	6	1	3	4	-
Finding land to build on/acquisition/development	2	7	5	14	11	19	14
Timely delivery of building supplies/Materials/Products (new)	1	8	-	-	-	-	-
Government regulation/permit/fees/demands	-	7	4	10	9	9	12
Pandemic impact	-	2	10	-	-	-	-
Economy/recession/consumer confidence/market conditions	-	1	5	13	26	16	13
Non-registered builders/Too much competition	-	-	8	-	-	-	-

Source: C3. What would you say is the ONE big challenge facing your company over the next 12 months? (n=220)

Overall Challenges

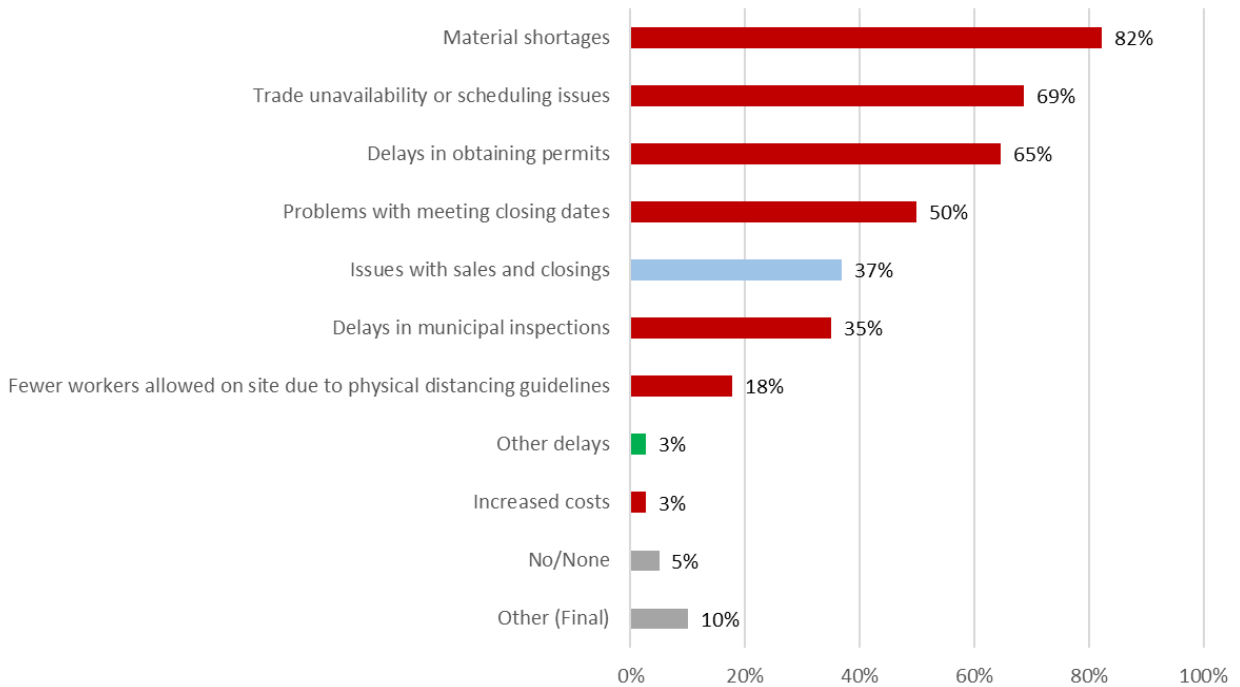
The survey examined the impact of various operational challenges on builders' businesses.

Builders were asked if they experienced any issues from a given list. Virtually all the builders responding to the survey (96%) have experienced at least one of the issues listed. Most have experienced multiple issues.

The most common issue, experienced by almost all builders, is **materials shortages** (82% of builders), although this saw a significant decrease from 2021 (94%).

The next-most common issue, experienced by 69% of builders is **trade unavailability/scheduling issues**, this also experienced a significant decrease from 2021 (84%).

Delays in obtaining permits is the third most commonly reported issue, experienced by 65% of respondents.

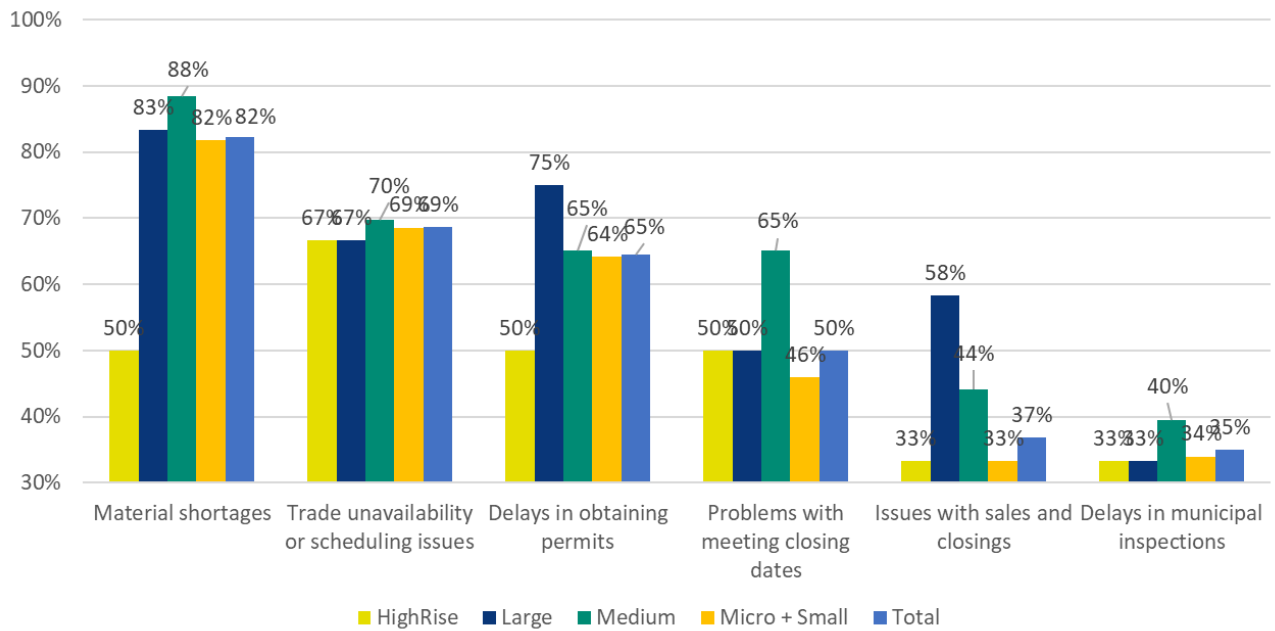


Source: C1_New. Is your business experiencing any of the following issues? (check all that apply). (n=220)

Large builders are significantly more likely than other groups to have experienced problems with *delays in obtaining permits* and *issues with sales and closings*.

Medium builders are more likely than other groups to have experienced problems with *material shortages*, *problems with meeting closing dates* and *delays in municipal inspections*.

Otherwise, the impacts are consistent across builder possession categories.



Source: C1_New. Is your business experiencing any of the following issues? (check all that apply). (n=220)

Builders from Zone 7 are statistically more likely to experience nearly all of the issues in the chart below, compared to other Zones, this may warrant some further investigation. In particular, builders from Zone 7 are significantly more likely to experience:

- Trade unavailability or scheduling issues,
- Problems with meeting closing dates, and
- Delays in municipal inspections.

Builders from Zone 5 are significantly less likely to experience material shortages compared to other Zones.

Builders from Zones 3 and 7 are significantly more likely to experience delays in obtaining permits compared to other Zones.

In %s	Total	ZONE 1	ZONE 2/4	ZONE 3	ZONE 5	ZONE 6/8/9/10/11	ZONE 7	ZONE 12/13
Material shortages	82	93	81	84	59	78	90	78
Trade unavailability or scheduling issues	69	61	57	72	68	59	80	70
Delays in obtaining permits	65	57	48	74	59	63	78	48
Problems with meeting closing dates	50	43	48	50	36	41	71	48
Issues with sales and closings	37	46	33	48	23	19	41	26
Delays in municipal inspections	35	29	38	31	32	33	51	26
Fewer workers allowed on site due to physical distancing guidelines	18	18	29	17	18	7	27	4
Increased costs	3	0	5	2	0	4	5	4
Other delays	3	4	0	3	5	4	2	0
Other	10	7	0	17	0	7	10	13
Nothing	5	4	14	0	9	11	0	4

Source: C1_New. Is your business experiencing any of the following issues? (check all that apply). (n=220)

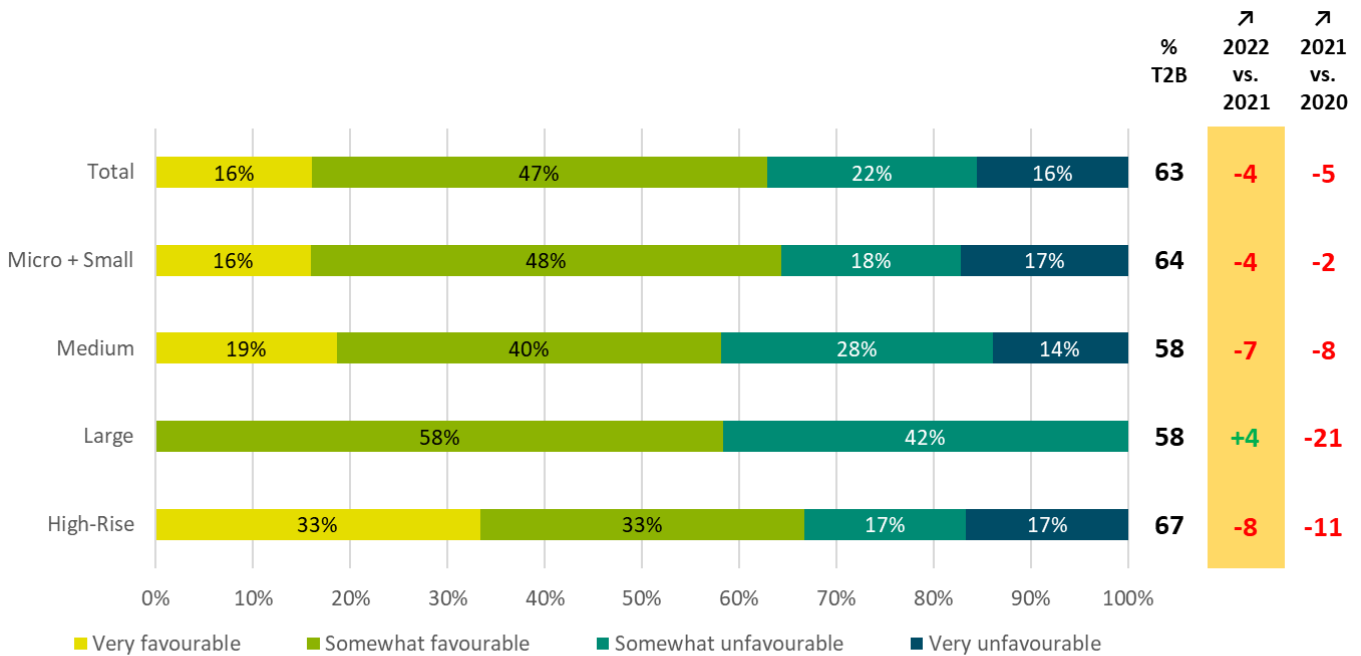
Builders' Overall Impression of Tarion

Overall Impression of Tarion – Based on Personal Experience

Builders' personal opinions of Tarion have been trending downward since 2017. Their opinions of Tarion declined by 11% overall between 2018-2019, and then remained relatively stable until 2021. This year, ratings have declined again across almost all possession categories, with the exception of large builders.

In 2022, about two-thirds of builders overall (63%) have favourable impressions of Tarion and this is relatively consistent across categories.

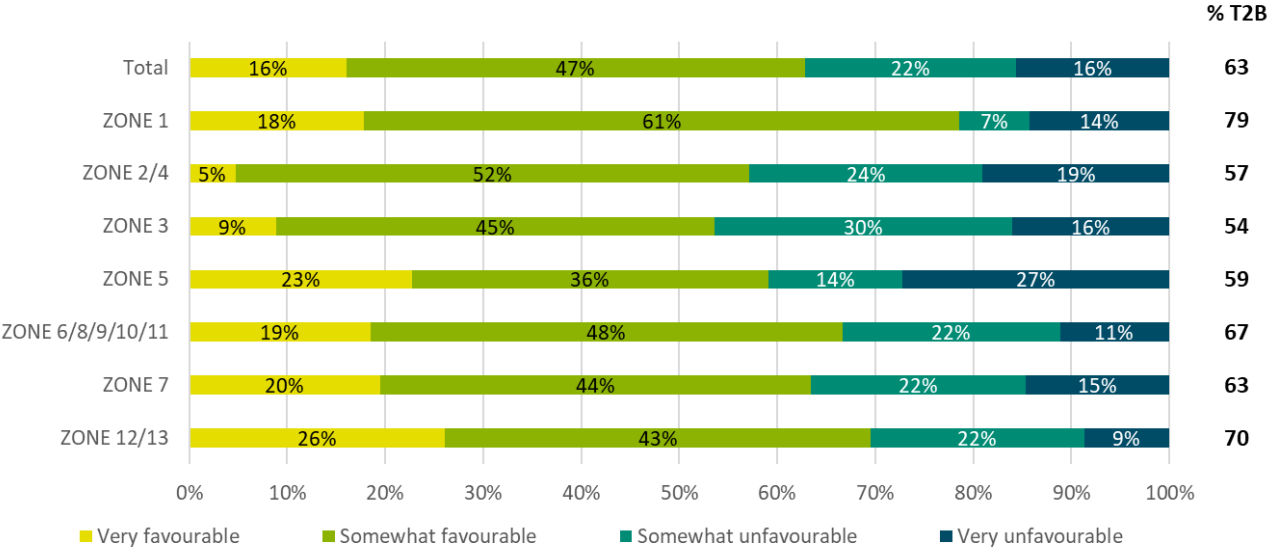
Overall, only 16% builders have *very favourable* impressions of Tarion.



Source: QD1A. Now onto the Tarion questions... Based on what you have read, seen or heard about TARION, or experienced yourself, would you say your opinion of the organization is...? (N=218)

Ratings from builders in Zone 1 were most likely to have *somewhat or very favourable* impressions of Tarion at 79%, followed by Zones 12 and 13 at 70%, while builders from Zone 3 were least likely to have a favourable impression of Tarion at 54%.

Builders from Zones 2 and 4 were least likely to have a very favourable impression of Tarion, at 5%. There is room to strengthen perceptions of Tarion by moving the *very favourable* score especially with builders in Zones 2,4 and 3.

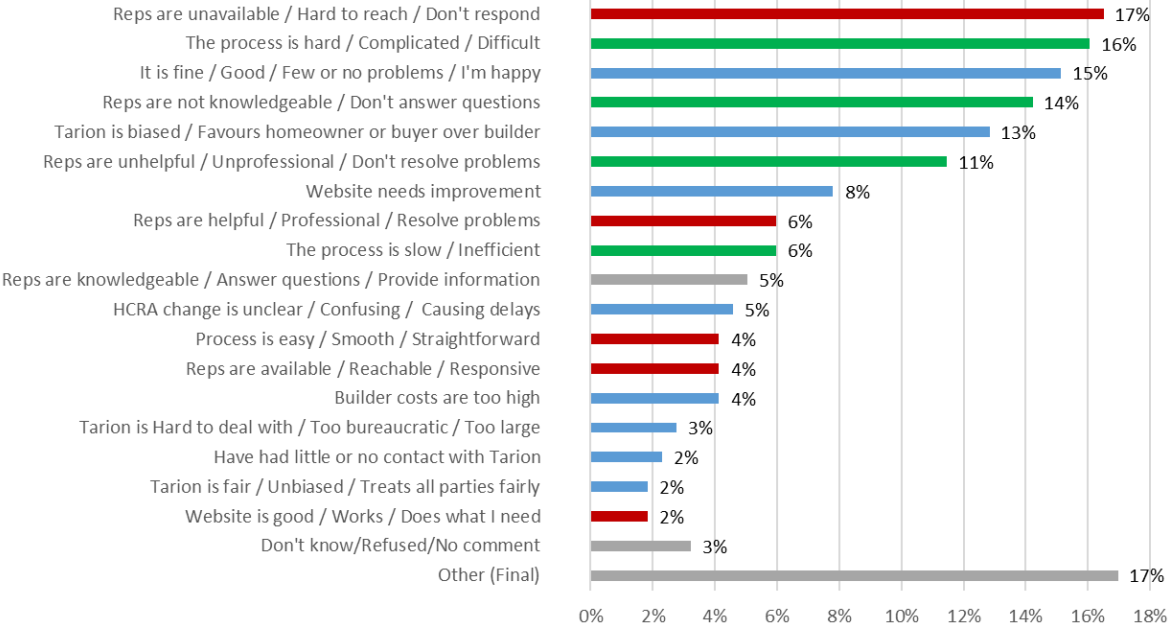


Source: QD1A. Now onto the Tarion questions... Based on what you have read, seen or heard about TARION, or experienced yourself, would you say your opinion of the organization is...? (N=220)

Nearly 3-in-10 builders (33%) voiced negative opinion on an open-ended question as to why they have provided their feedback they way they did and the top 3 of 4 choices used by the builders are: reps are hard to reach, the process is difficult, and reps don't answer the questions when being asked.

Suggestions for the improvements in the next few years to strengthen perceptions of Tarion should be:

- Make Tarion’s reps more accessible and provide responses quickly,
- Reduce bureaucracy by making processes less bureaucratic and complicated,
- Train Tarion’s reps to be more knowledgeable so that they can provide correct and details answers to the questions that are being asked.

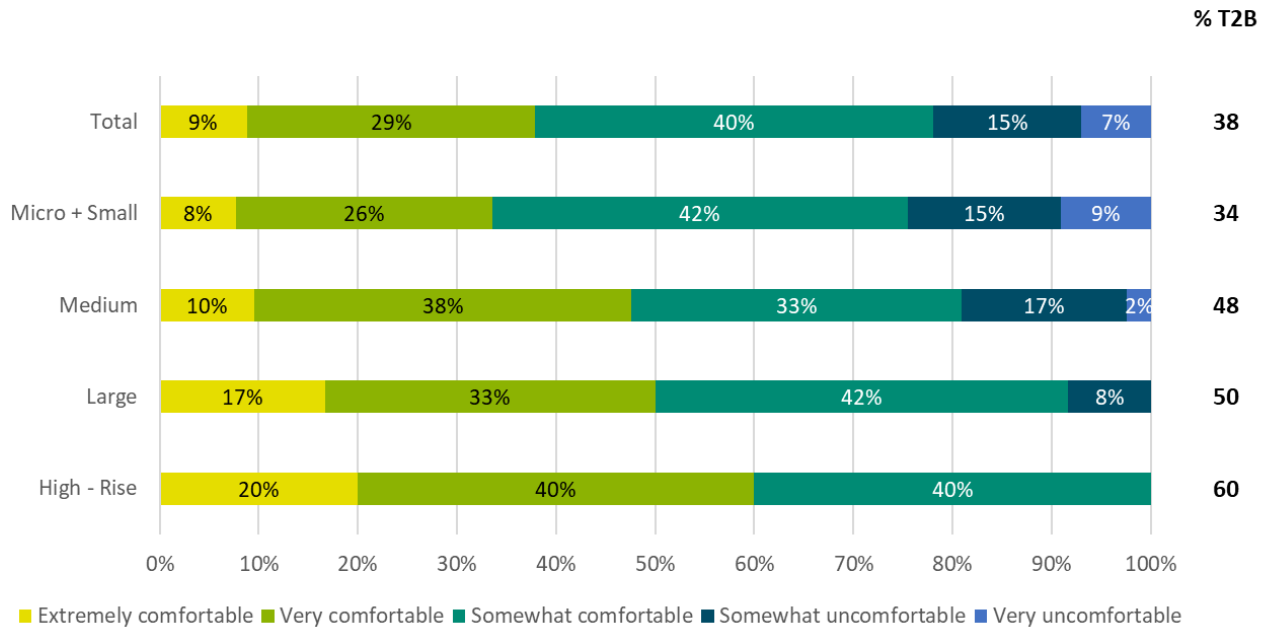


Source: D1AO. Why did you say your opinion of Tarion is <D1A>?(n=218)

Comfort With Tarion's Digital Tools or Platforms

Builders were asked their comfort level with interacting with Tarion's digital tools or platforms, overall, 38% of builders reported very or extremely comfortable, suggesting a room for improvement.

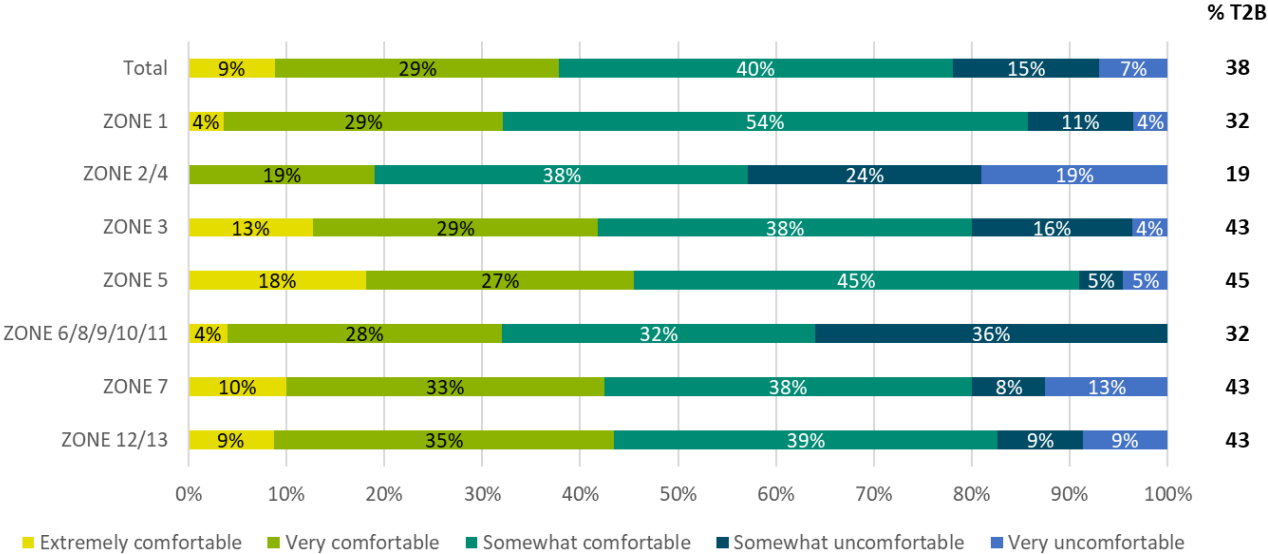
Interestingly, comfort level with Tarion's digital tools or platforms will increase progressively from micro and small builders to high-rise builders, with micro and small builders least likely to be comfortable at 34%, while high-rise builders are most likely to be comfortable at 60%.



Source: D4_NEW. What is your general comfort level with interacting with Tarion's digital tools or platforms (e.g. mobile apps, online payments, BuilderLink etc.) (N=220)

Builders from Zones 2 and 4 were least likely to be comfortable with Tarion’s digital tools or platforms at 19%, with 0% of builders reported ‘extremely comfortable’.

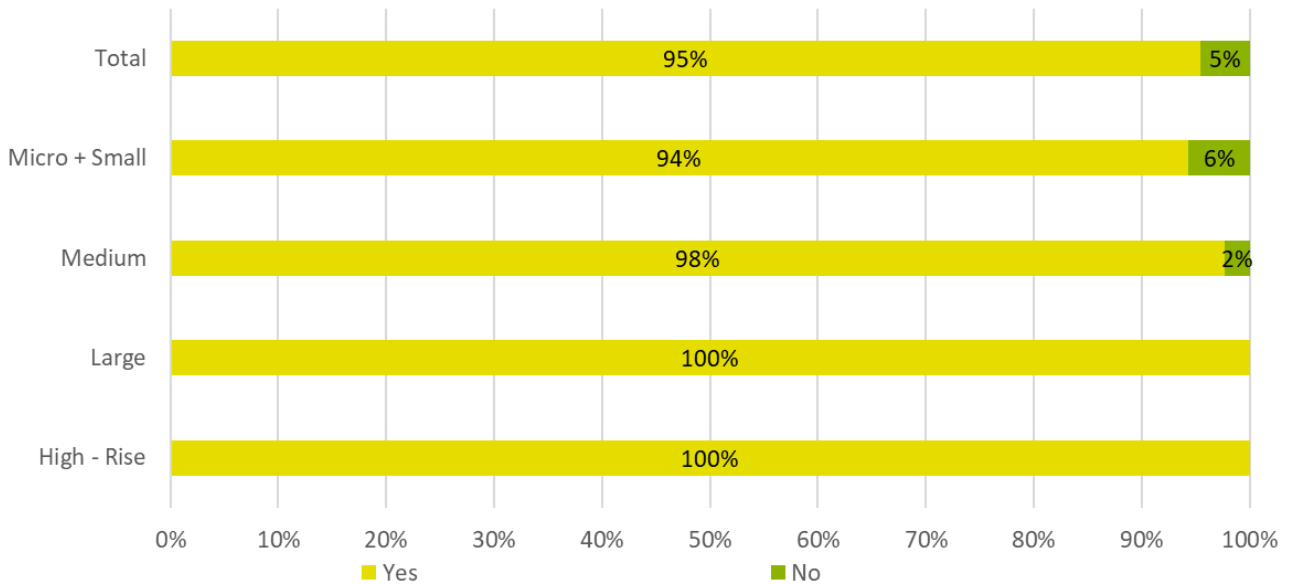
Builders from Zones 3, 5, 7, 12 and 13 were most likely to be comfortable with Tarion’s digital tools or platforms (between 43% and 45%).



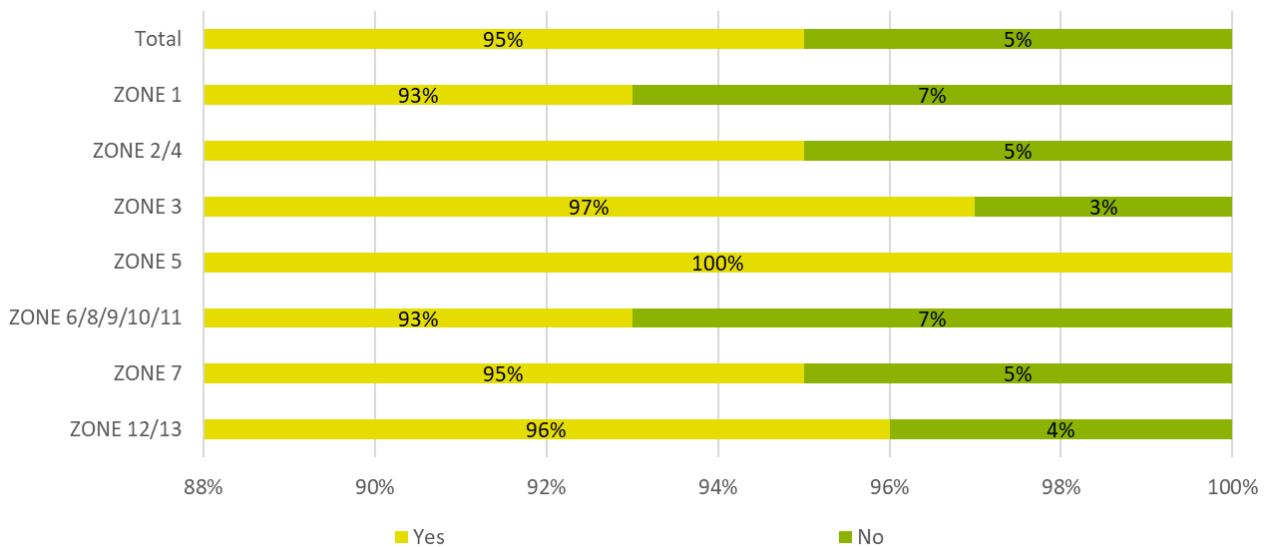
Source: D4_NEW. What is your general comfort level with interacting with Tarion's digital tools or platforms (e.g. mobile apps, online payments, BuilderLink etc.) (N=220)

Usage of BuilderLink

Overall, the vast majority of builders use BuilderLink (95%); however, it appears that some micro & small along with the medium builders avoid using the BuilderLink. Builders from Zones 1, 6, 8, 9, 10, and 11 should be encouraged to use BuilderLink more proactively when communicating with Tarion.



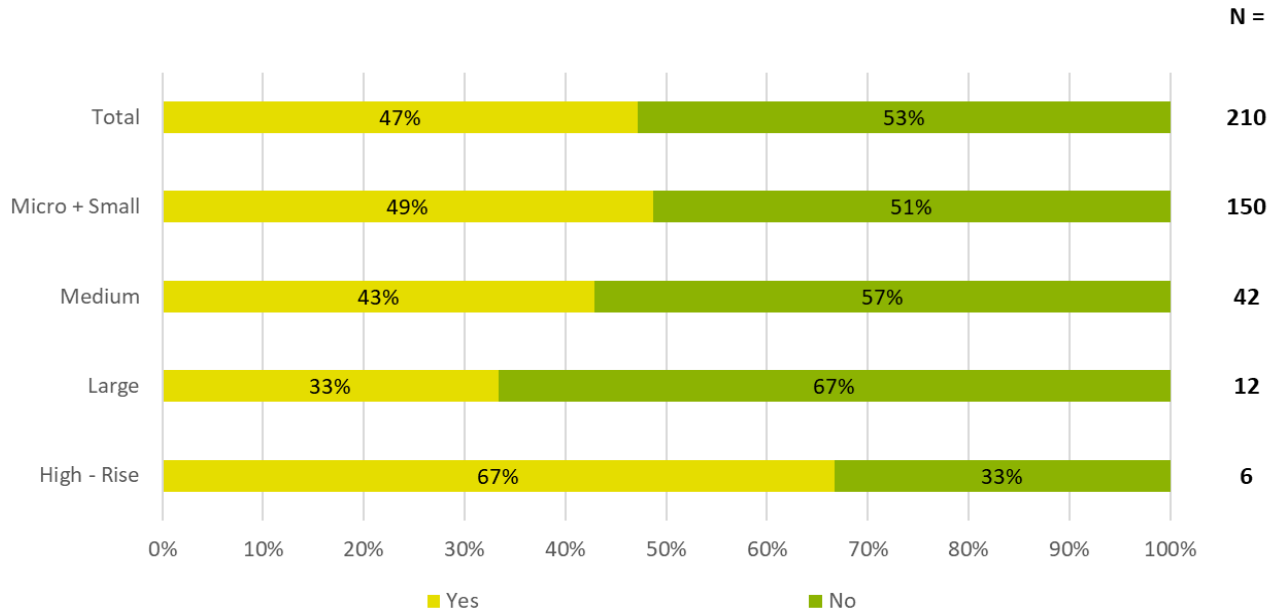
Source: D8A_NEW. Are you or someone in your company using BuilderLink? (N=220).



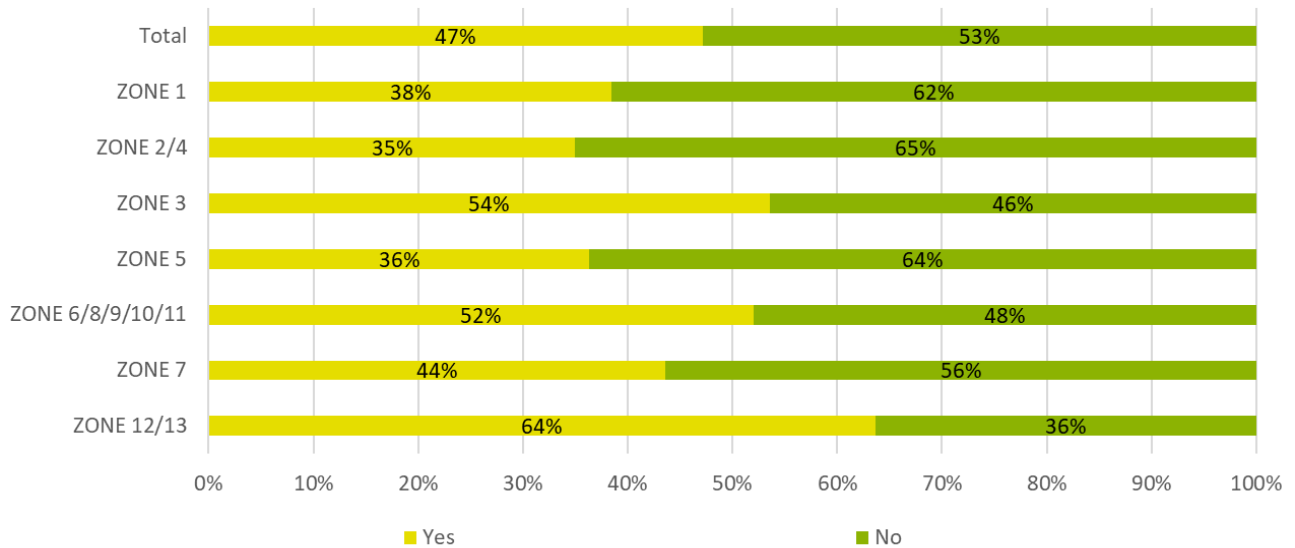
Source: D8A_NEW. Are you or someone in your company using BuilderLink? (N=220).

Usage of the Electronic Funds Transfer function

Nearly half of all builders use the electronic funds transfer function (47%). Large builders were least likely to use the function at 33% while high-rise builders were most likely to use the function at 67%. Builders from Zones 12 and 13 were most likely to use the function at 64%, Zones 2 and 4 (35%) and Zone 7 (36%) were least likely to use the function.

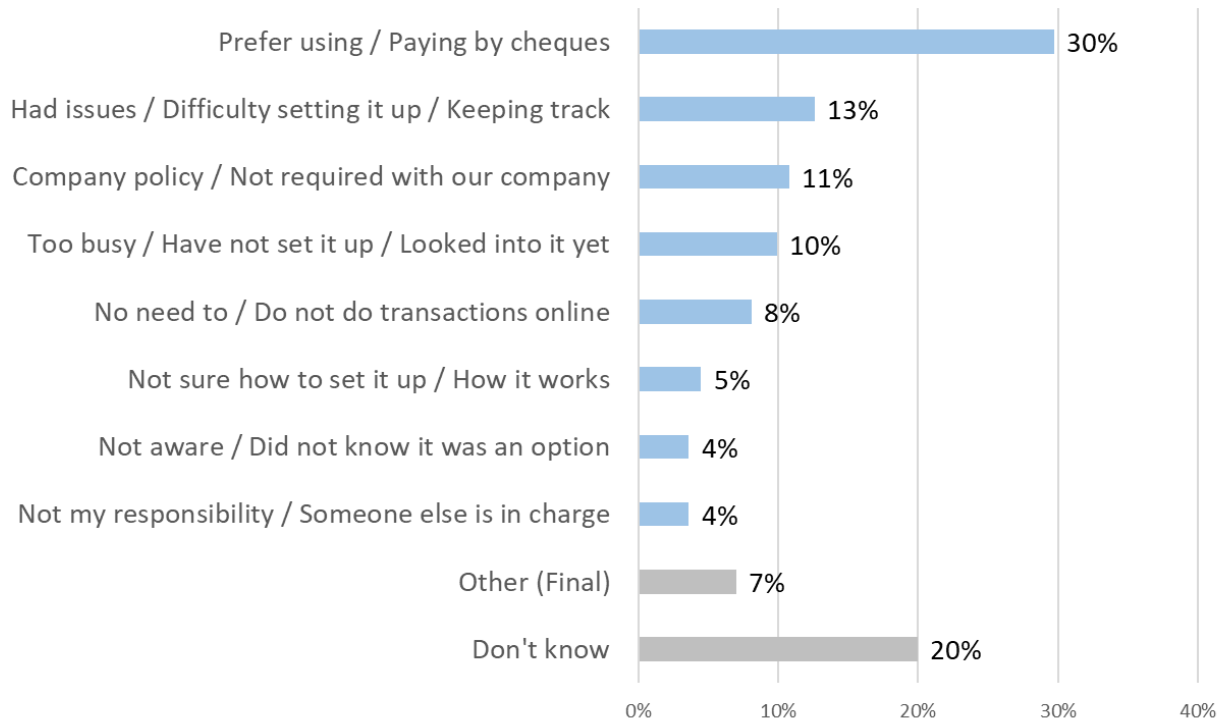


Source: D8A_NEW_2. Do you use the Electronic Funds Transfer function? Base: those who use Buldinglink: (N=210).



Source: D8A_NEW_2. Do you use the Electronic Funds Transfer function? Base: those who use Buldinglink: (N=210).

Those builders that did not use EFT function were asked for more specific reasons as to why they do not use it and the most common reason given is the personal preference to use cheques (30%), 13% of builders reported they had difficulty setting it up or using the function. Noteworthy, 11% of the builders have reported that it was due to a company policy.



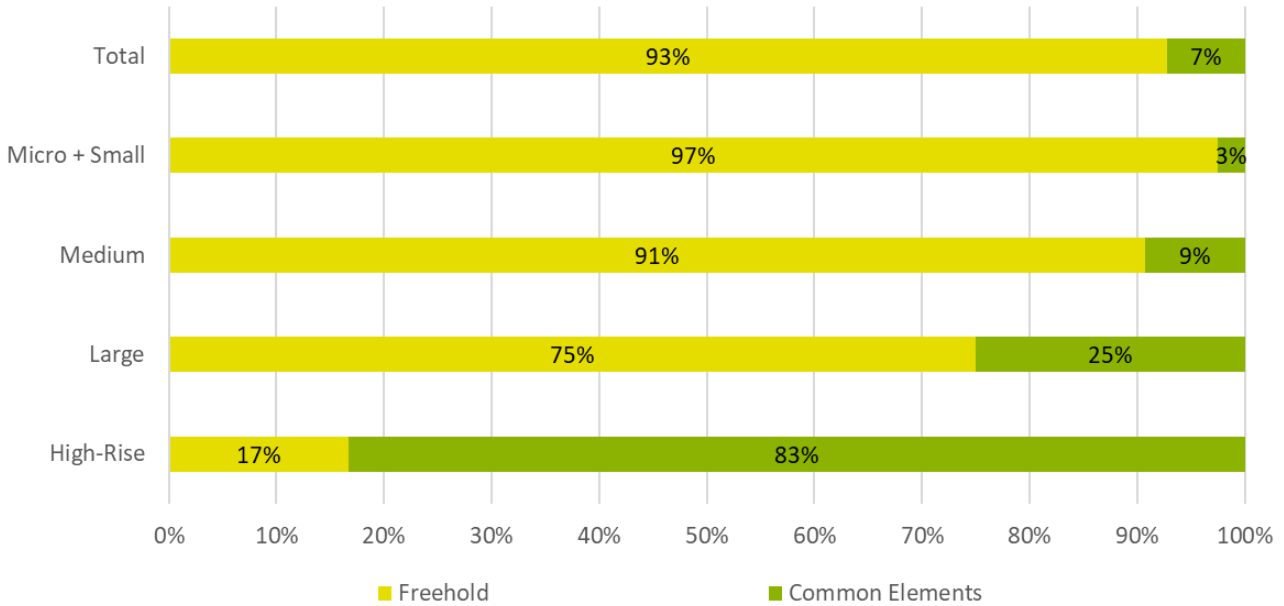
Source: D8A_NEW_3. Why not? BASE: Do not use EFT function (N=111)

Teams Most Often Dealt with Regarding Warranty Matters

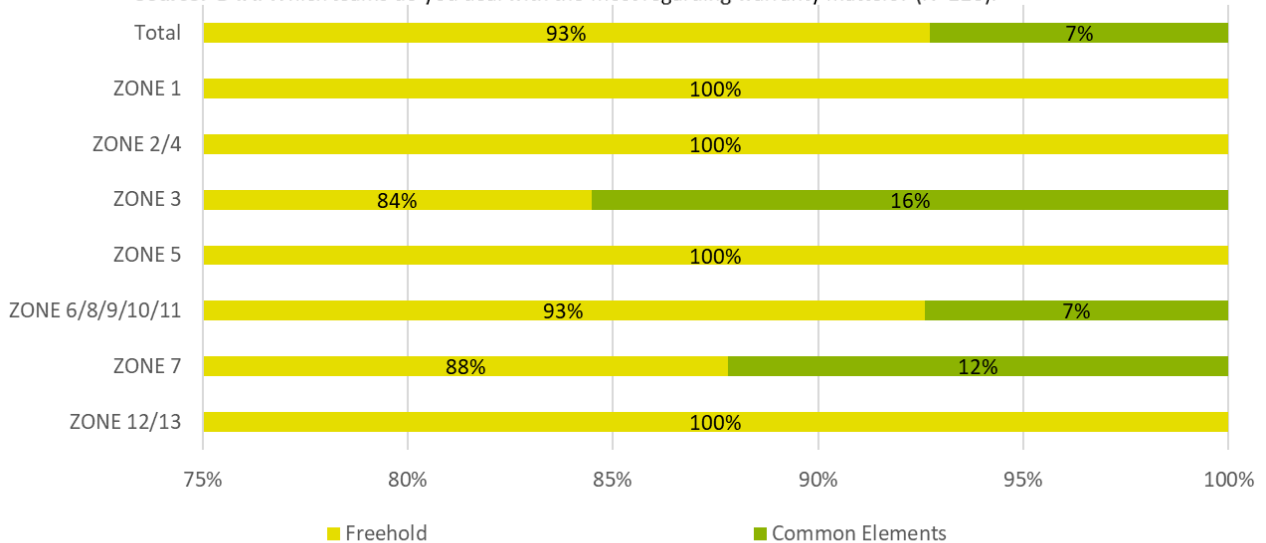
Overall, most builders deal with freehold teams regarding warranty matters.

High-rise builders are least likely to deal with freehold teams regarding warranty matters at 17%, however, noteworthy to mention that some builders are classified in multiple builder categories – building both freehold and high-rise units.

Micro and small builders are most likely to deal with freehold teams at 97%. Builders from Zone 3 and 7 are most likely to deal with freehold teams regarding warranty matters at 16% and 12%, respectively.



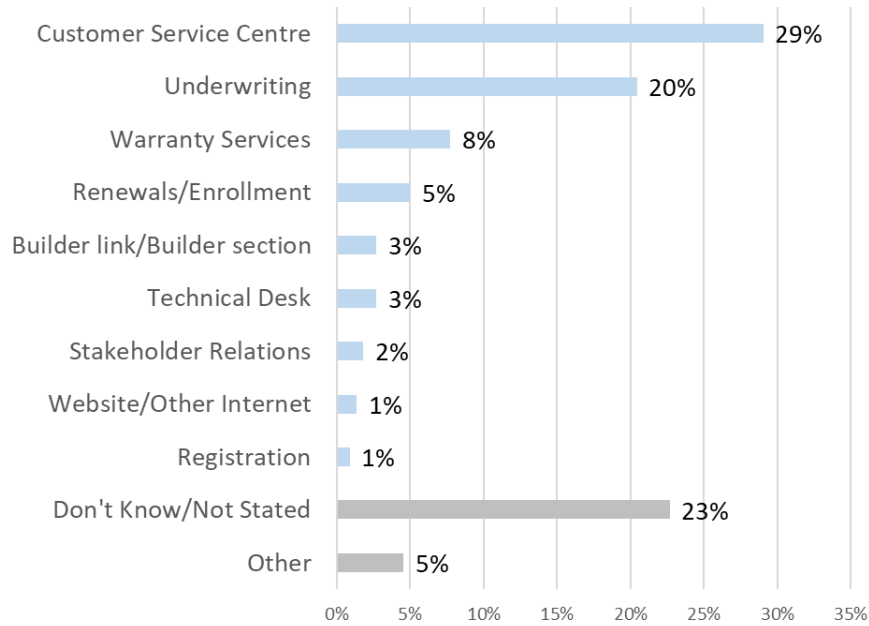
Source: D4A. Which teams do you deal with the most regarding warranty matters? (N=220).



Source: D4A. Which teams do you deal with the most regarding warranty matters? (N=220).

Departments Most Likely to Start with When Contacting Tarion

Almost half of all builders initiate contact with Customer Service Center (29%) or Underwriting (20%) departments when contacting Tarion. Overall, builders from Zone 5 were least likely to start with customer service centre at 18%. Builders from Zone 5 are most likely to start with Underwriting department at 50%.



Source: D5. Which ONE contact area or department are you most likely to start with if you need to contact Tarion? (N=220)

In %s	Total	ZONE 1	ZONE 2/4	ZONE 3	ZONE 5	ZONE 6/8/9/10/11	ZONE 7	ZONE 12/13
Customer Service Centre/Toll-free line/customer.service@tarion.com	29	29	24	29	18	30	32	39
Underwriting	20	25	14	21	50	15	17	4
Warranty Services	8	4	5	10	14	4	12	0
Renewals/Enrollment	5	4	10	2	0	11	7	4
Technical Desk	3	4	0	7	0	0	0	4
Builder link/Builder section	3	4	5	2	0	4	5	0
Stakeholder Relations (formerly Builder Relations)	2	4	0	3	0	0	0	4
Website/Other Internet	1	4	5	0	0	0	0	4
Registration	1	0	0	2	0	0	0	4
Other	5	7	10	3	0	4	5	4
Don't Know/Not Stated	23	18	29	19	14	33	22	30

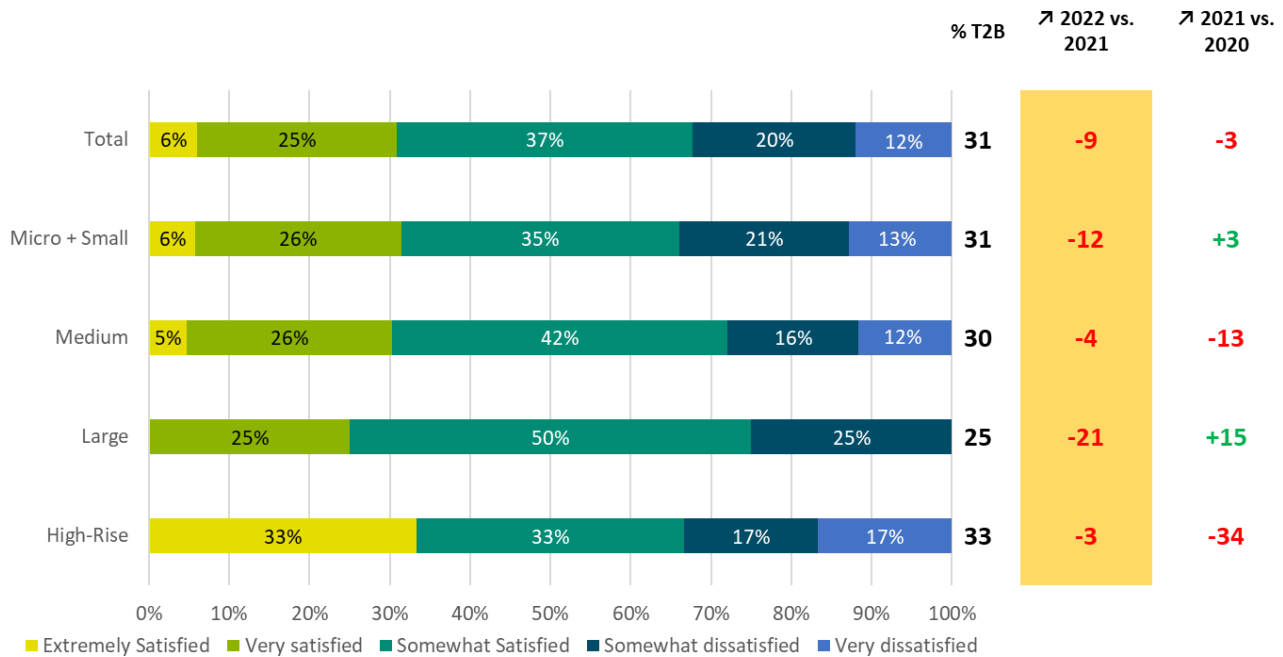
Source: D5. Which ONE contact area or department are you most likely to start with if you need to contact Tarion? (N=220)

Satisfaction with Tarion's Performance

Satisfaction with Tarion’s overall performance in 2022 (31%) dropped by 9% from 2021 (40%). Only 6% of all builders reported being *extremely satisfied* with Tarion’s performance, suggesting room for improvement.

Large builders were least likely to be satisfied at 25%, compared to other builders that range between 30%-33%.

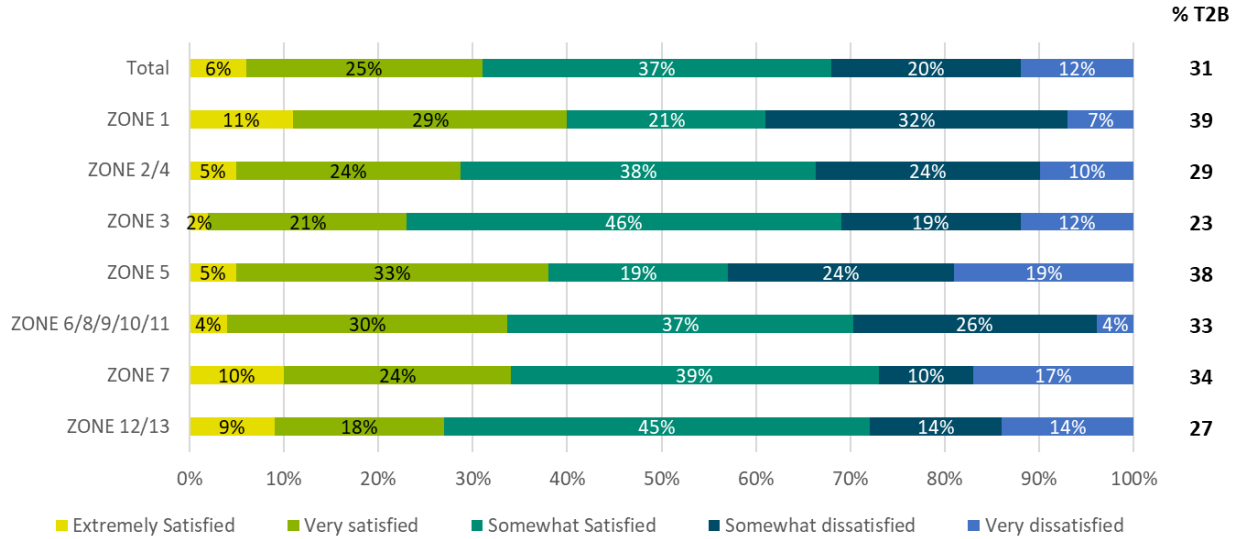
The most significant drivers for the overall decrease come from micro and small builders (31%, decrease of 12% from 2021), and large builders (25%, decrease of 21% from 2021).



Source: F1A. How satisfied are you with Tarion's overall performance over the last year? Are you... (N=217)

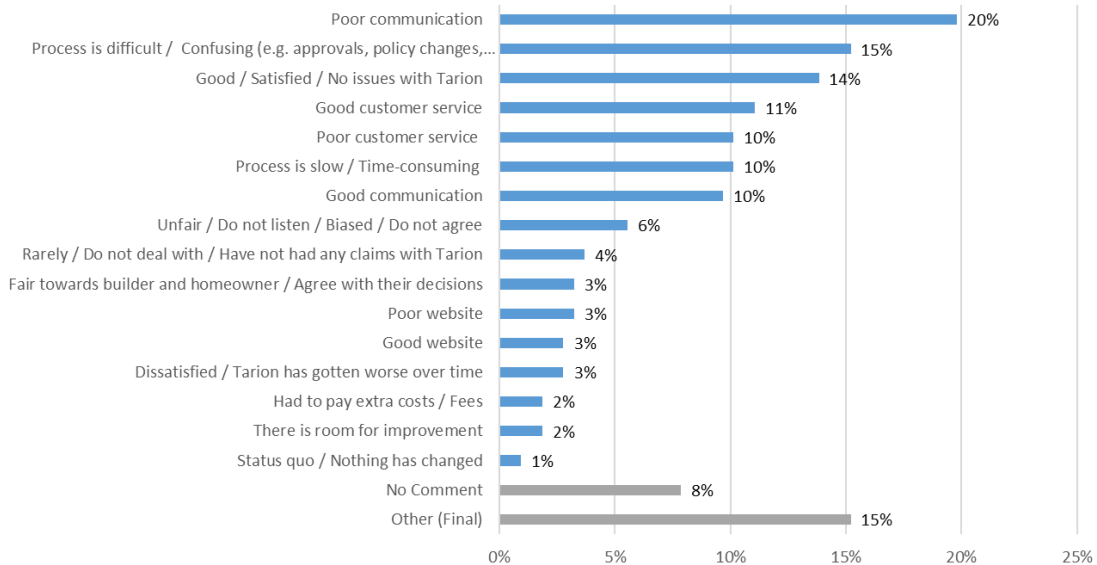
*Note: the satisfaction performance have changed from the last two years to the last year in 2022.

Builders from Zone 3 (23%) and Zones 12 and 13 (27%) were least likely to be satisfied with Tarion’s performance while builders from Zone 1 (39%) and Zone 5 (38%) were most likely to be satisfied with Tarion’s performance.



Source: F1A. How satisfied are you with Tarion's overall performance over the last year? Are you... (N=217)

Respondents were also asked to provide rationale for the performance ratings they chose and 20% of stated that poor communication is the top issue they have with Tarion. It is followed by the process being difficult and confusing (15%) – both reasons are negative in nature. The 3rd and 4th reason given by builders were positive in nature, 14% of other respondents were satisfied with the performance of Tarion and had no complaints which was followed by good customer service (11%). The gap between the top two positive (35%) and top two negative mentions (25%) is 10%, in favor of negative rating.



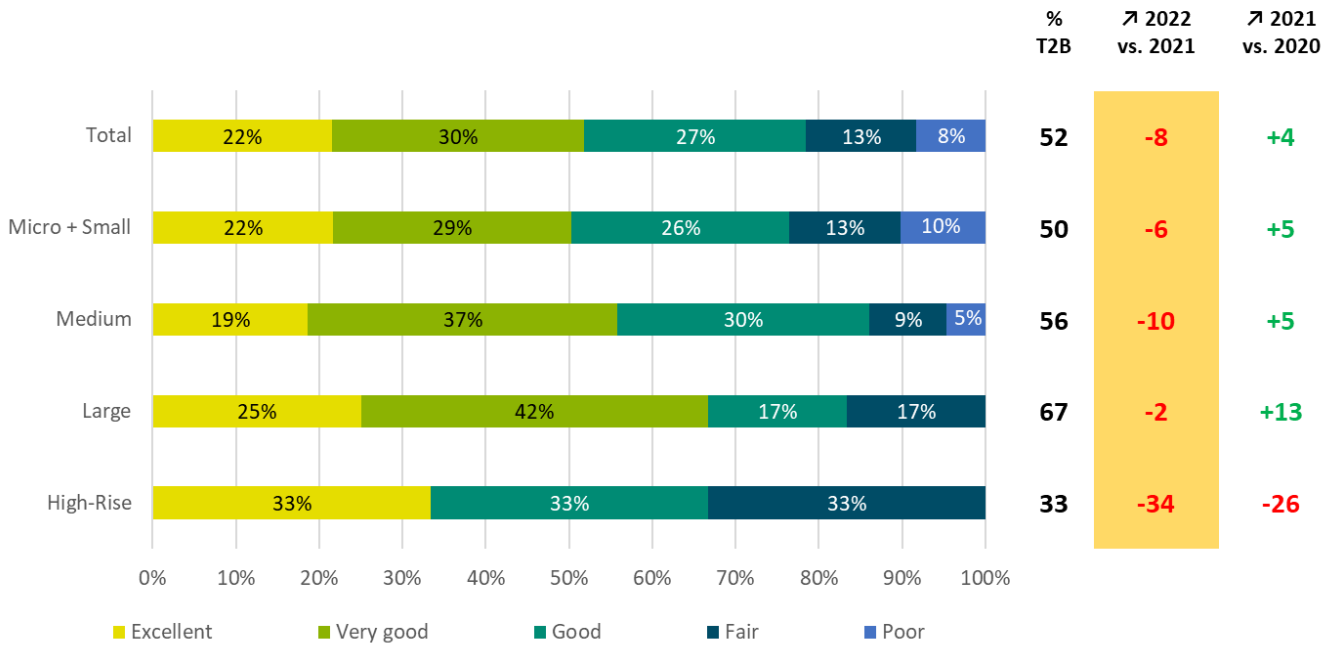
Source: F1AO. Why did you rate Tarion's overall performance over the last year as <F1A>? ? (N=217)

*Note: the satisfaction performance have changed from the last two years to the last year in 2022.

Strength of the Builder Relationship with Tarion

In 2022, the percent of builders rating their relationship with Tarion as *excellent* or *very good* declined by 8%, at 52% in 2022 compared to 60% in 2021.

High-rise builders saw the largest declines for two years in a row and currently sitting at 33% as of 2022, a decrease by 34% from 2021 or if comparing to 2020 year, a decrease of 60%.

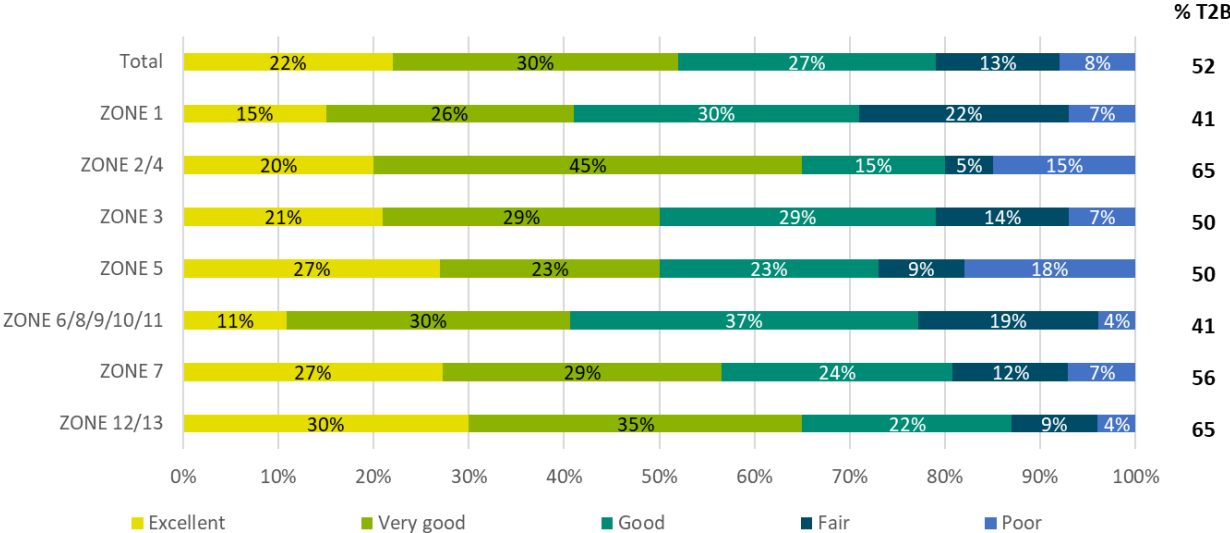


Source:

F6A. Taking all things into consideration, how would you rate your overall relationship with Tarion? Would you say your relationship is...? (N=218)

Builders from Zones 1 and Zones 6, 8, 9, 10, 11 were least likely to rate perception of the strength of their relationship with Tarion in 2022 as *excellent or very good*, at 41% each.

Builders from Zones 2 and 4 and Zones 12 and 13 were most likely to rate perception of the strength of their relationship with Tarion in 2022 as *excellent or very good*, at 65% each.



Source:
F6A. Taking all things into consideration, how would you rate your overall relationship with Tarion? Would you say your relationship is...? (N=218)

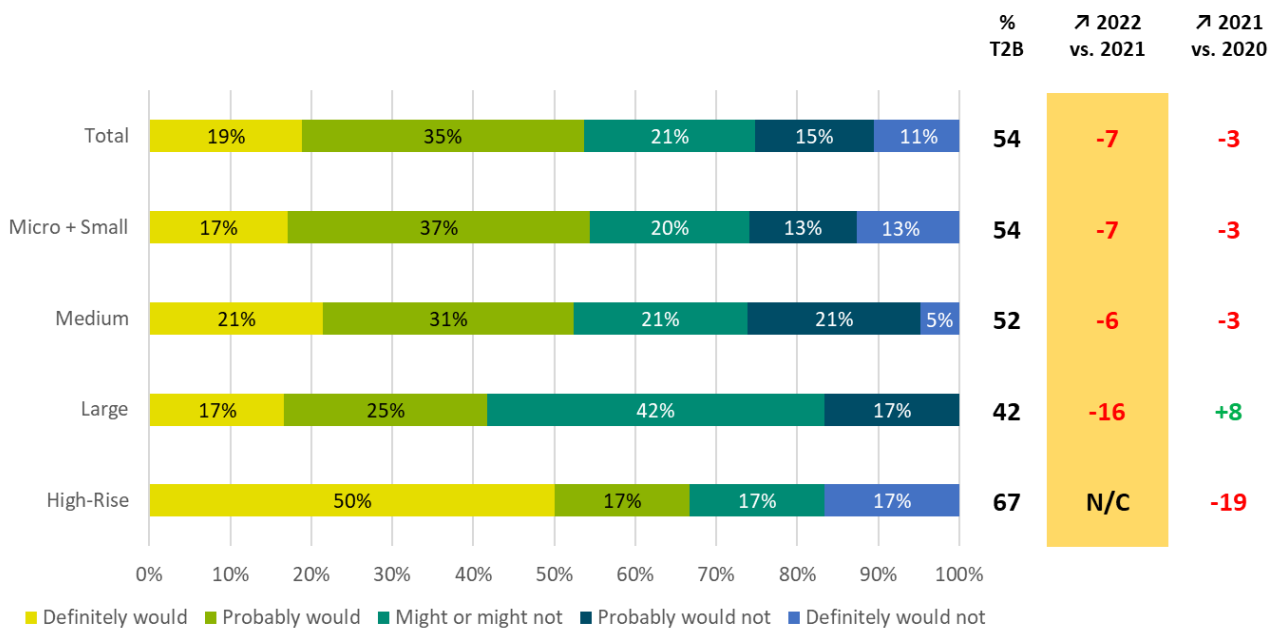
Tarion Advocacy

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

Overall, the likelihood of advocating for Tarion in 2022 (54%) dropped by 7% compared to 2021 year (61%). About 2-in-10 builders (19%) indicated that they would *definitely say* positive things about the organization.

Large Builders showed the largest negative change in the willingness to advocate for Tarion. (67%→42%). Nearly 2-in-10 Builders would not say positive things about Tarion (BTM2 18%→21%, up by 3 percentage points)

There is **room for Tarion to move this score up** with builders across all categories.

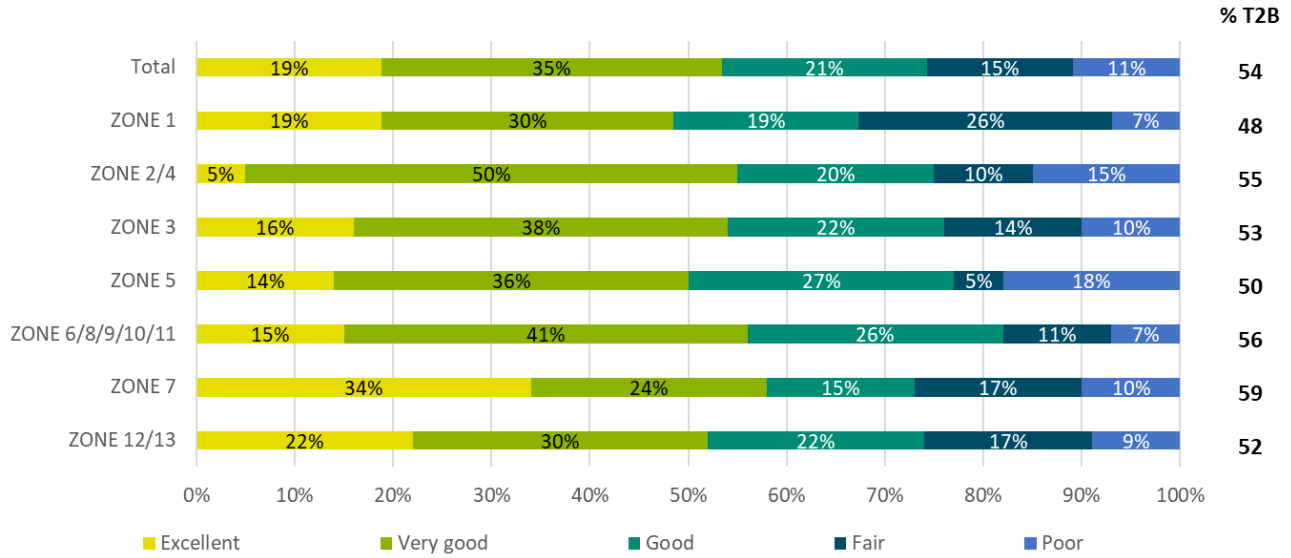


Source:

F7A. If asked by another builder, how likely would you be to say positive things about Tarion? Would you say...? (N=218)

Builders from Zone 7 were most likely to say positive things about Tarion at 59%.

Builders from Zone 5 were most likely to choose *poor* rating on whether they would say positive things about Tarion at 18%.



Source:
F7A. If asked by another builder, how likely would you be to say positive things about Tarion? Would you say you...?
 (N=218)

Specific Impressions of Tarion

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

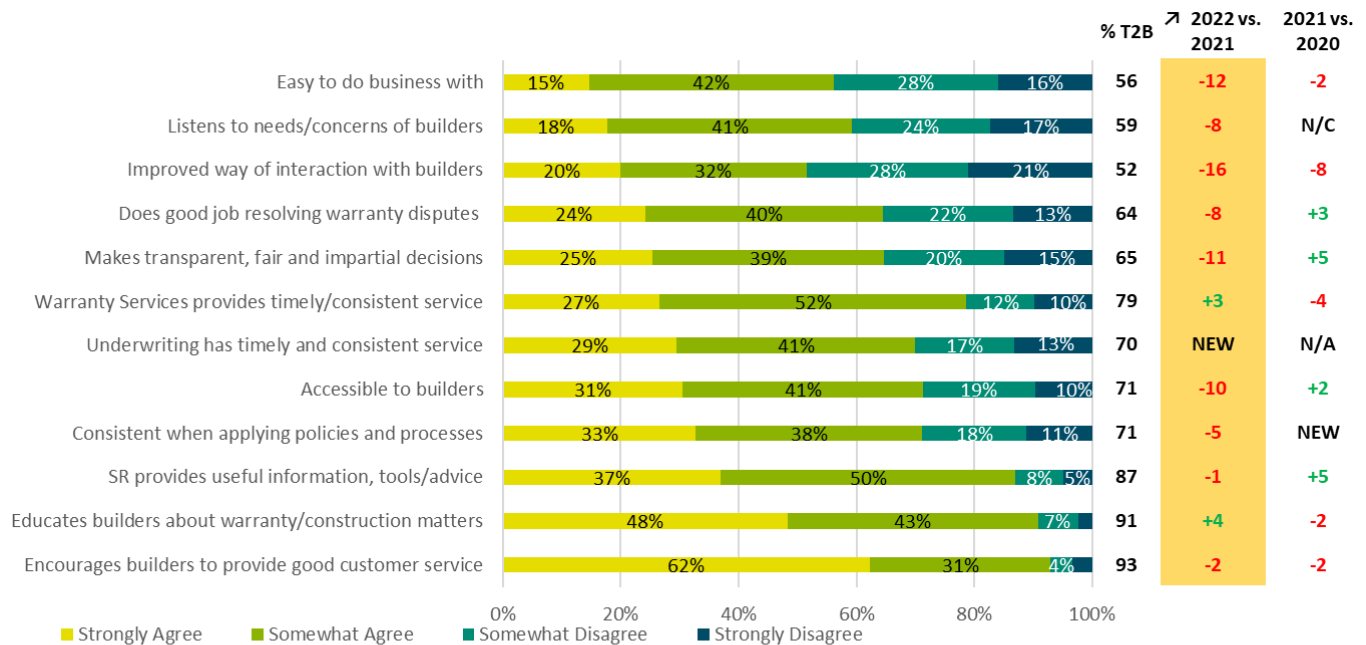
- “Encourages builders to provide homeowners with good customer service” (93% T2B),
- “Stakeholder Relations provides useful information, tools/advice” (87% T2B), and
- “Educates builders about warranty/construction matters” (91% T2B).

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

- Easy to do business with (44% disagree)
- Listens to needs/concerns of builders (41% disagree)
- Improves the way it interacts and communicates with builders (49% disagree)
- Does a good job at resolving warranty disputes (35% disagree)
- Makes transparent, fair and impartial decisions (35% disagree)

Improves the way it interacts/communicates has experienced the greatest rating decrease when comparing to last year, followed by *easy to do business with*, *makes transparent, fair, and impartial decisions*, and *accessible to builders*.

Medium Volume Builders were less likely to think “Tarion improved the way that it interacts and communicates with builders” (47%, compared to Small (52%), Large (54%) and High-Rise (75%) Volume Builders.

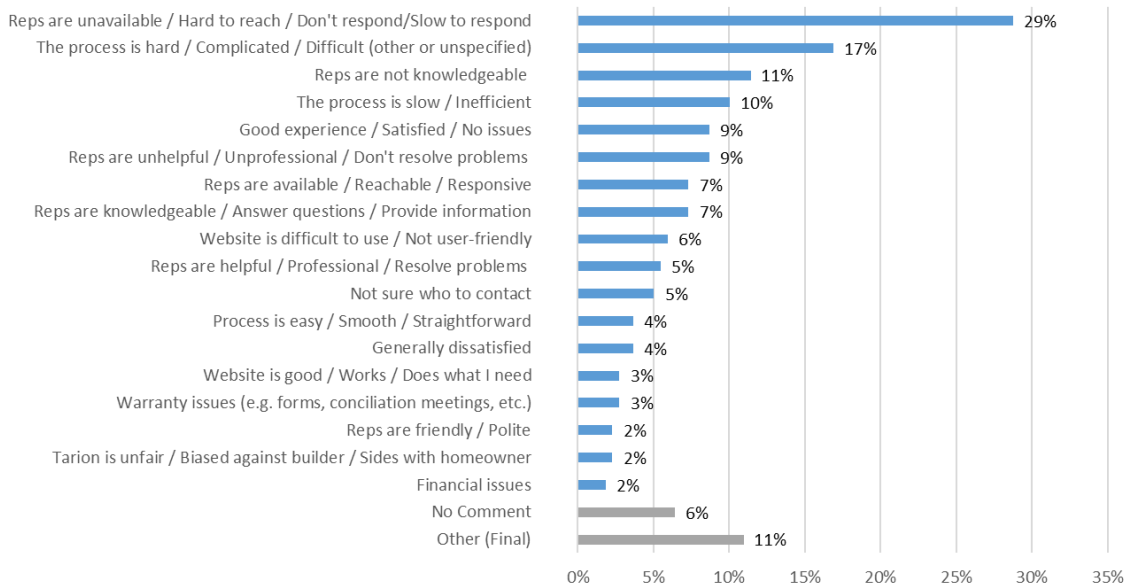


Source:

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

When asking builders if Tarion is easy to do business with ... almost every 4th builder (29%) had issues with “Reps are unavailable / Hard to reach / Don't respond / Slow to respond” followed by “The process is hard / Complicated / Difficult (other or unspecified)” at 17% in 2022.

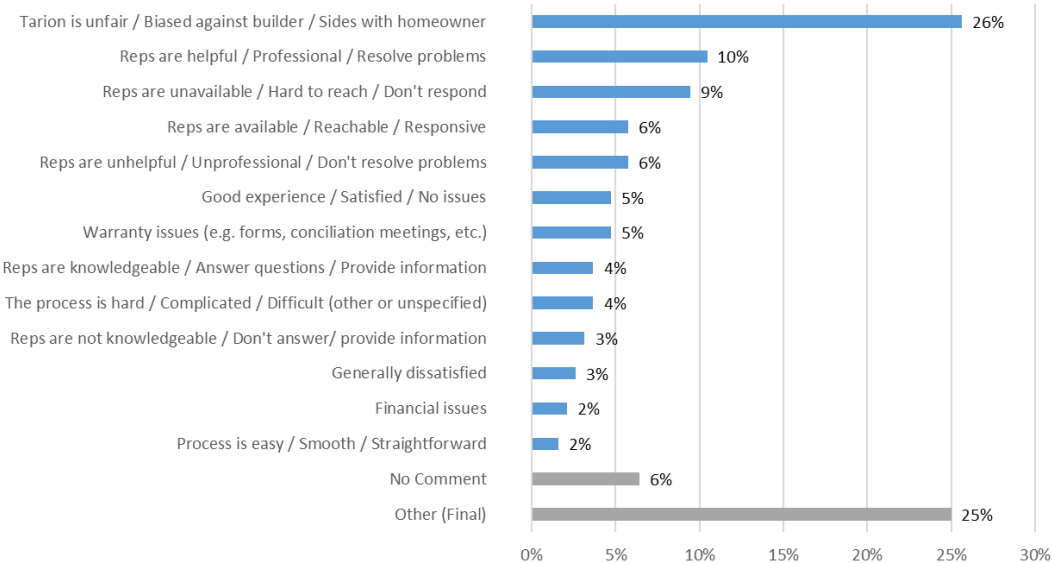
Of those builders [123] that had provided an agreement response to our question if ‘Tarion is easy to do business with’ (TOP2: strongly or somewhat agree), 20 builders or 16% provided an open-end response that also contradicted their selection by saying “Reps are unavailable / Hard to reach / Don't respond / Slow to respond”, followed by 13 builders (11%) saying that “The process is hard / Complicated / Difficult (other or unspecified)”



Source: D6AO. Why did you rate Tarion is easy to do business with as <D6A>? (n=219)

When asking builders if Tarion listens to the needs and concerns of builders... every 4th builder (26%) had issues with “Tarion is unfair / Biased against builder / Sides with homeowner” followed by “Reps are helpful / Professional / Resolve problems / Work to resolve issues)” at 10% in 2022.

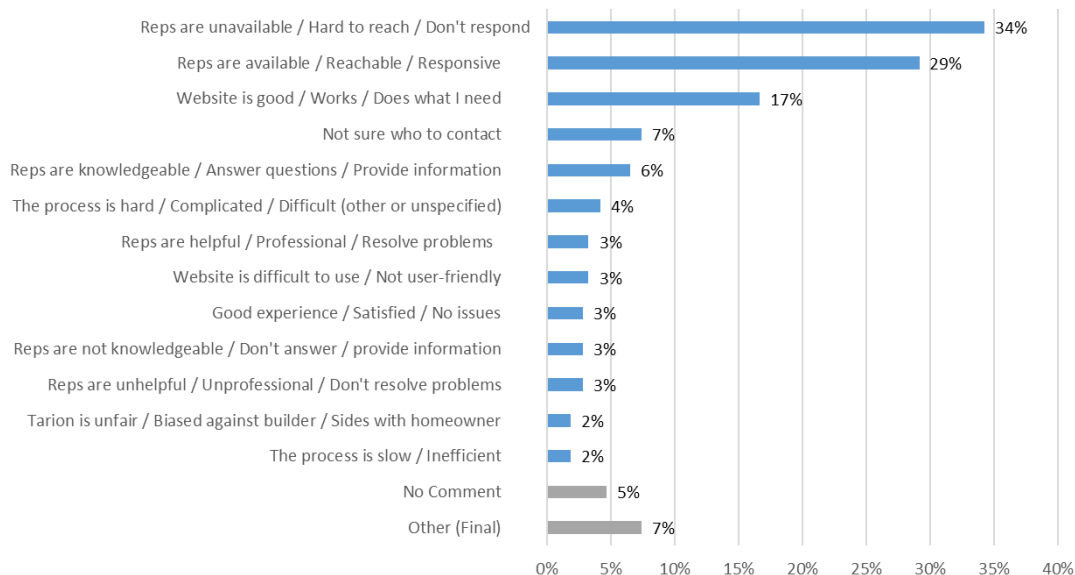
Of those builders [113] that had provided an agreement response to our question if ‘Tarion listens to the needs and concerns of builders’ (TOP2: strongly or somewhat agree), 16 builders or 14% provided an open-end response that also contradicted their selection by saying “Tarion is unfair / Biased against builder / Sides with homeowner”, followed by 19 builders (17%) saying that “Reps are available / Reachable / Responsive”.



Source: D6BO. Why did you rate Tarion listens to the needs and concerns of builders as <D6B>? (n=191)

At the overall level, builders are almost evenly divided as to whether reps are available (29%) or unavailable (34%) to them. In the previous question, we asked builders if Tarion is accessible to builders; 154 out of 216 builders agreed with our statement (71%).

Once asked why they rated as such, of those builders that were in the agreement statement, 22% provided an open-end response that also contradicted their selection, while only 39% of those 154 builders provided comments that backed up their agreement selection.

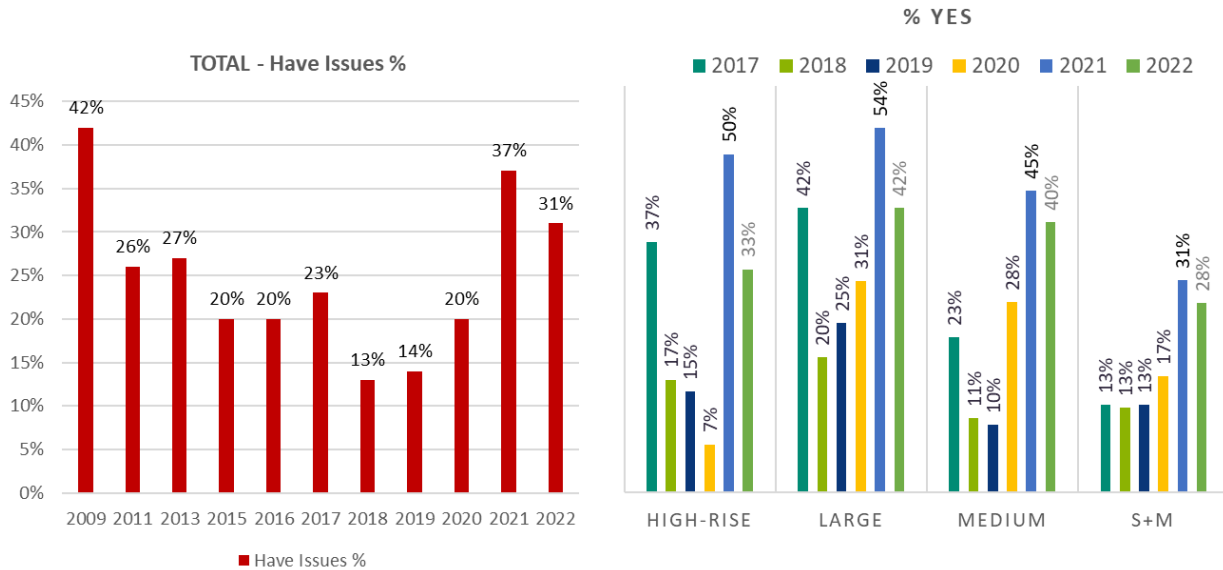


Source: D6F_NEWO. Why did you rate Tarion is accessible to builders as <D6F_NEW>? (n=216)

Concerns and Builder-Driven Suggestions for Improvement

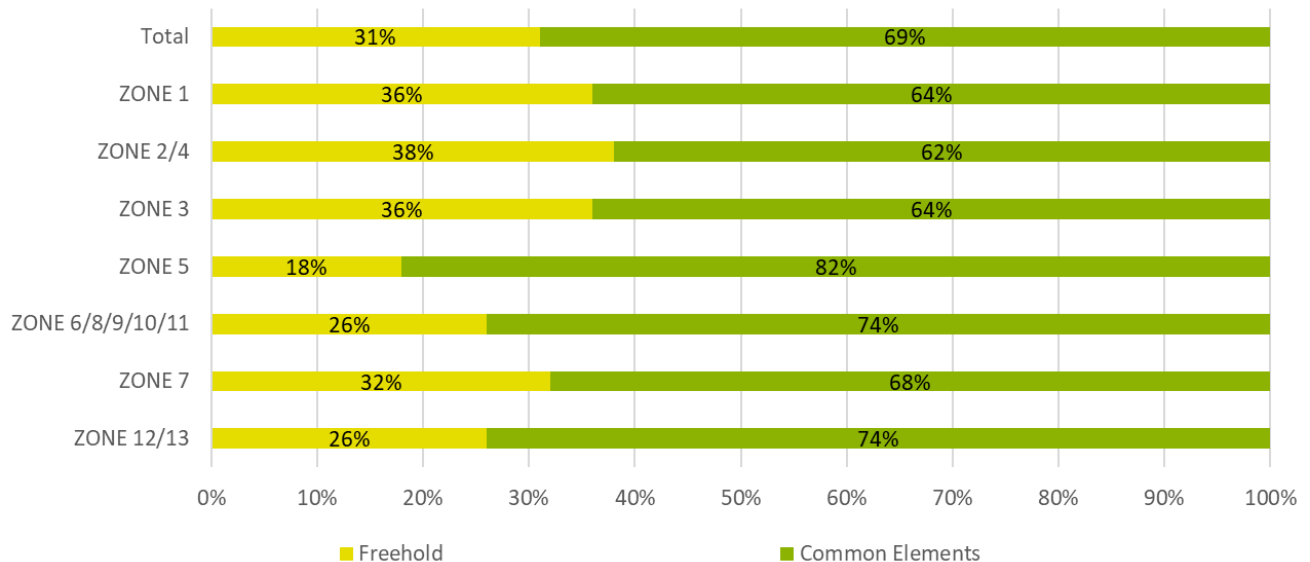
Builders' Major Concerns / Issues with Tarion

In 2022, the proportion of builders reporting they have issues with Tarion or major concerns about changes Tarion has made in the past year decreased by 6% compared to 2021. In 2022, 31% of builders indicate that they have issues. This decrease has occurred across all builder categories. Small + Micro builders are the group that is least likely to have issues with Tarion.



Source: F3A. Do you have any issues with Tarion or major concerns about changes they've made in the last year? (n=220)

Builders from Zones 2 and 4 were most likely to have major concerns with Tarion about changes they've made in the last year, at 38%, followed by Zones 1 and 3, at 36% each.



Source: F3A. Do you have any issues with Tarion or major concerns about changes they've made in the last year? (n=220)

The 31% of builders who expressed concerns were asked on an open-ended basis, what those issues or concerns are. The issues that they cited are shown below, and mostly involve poor customer service and warranty/conciliation issues.

Major Issues / Concerns	'22 %s	'21 %s	'20 %s	'19 %s	'18 %s	'17 %s
Conciliation/Warranty process is difficult for builder	14	17	14	7	23	33
HCRA is difficult/Confusing/Did not find them helpful/Prefer to only deal with Tarion	14	-	-	-	-	-
Poor customer service/Don't provide help/Don't answer questions	12	20	12	18	17	14
Hard to reach/Don't answer phone/Don't call back/Slow to call back	12	8	14	14	9	10
Online features are difficult to access/Not accessible	12	4	6	7	20	3
Decisions are unfair to the builder/Inconsistent/Unbalanced	10	19	10	4	17	29
Costs of fees/Deposits etc.	9	6	18	18	6	-
Warranty standards keep changing/Keeps getting harder for the builder	7	16	8	7	6	21
Tarion doesn't listen to builders/Ignores builder input	6	2	8	7	3	11
HCRA is slow/Bureaucratic	4	-	-	-	-	-
Tarion solicits/Charges for conciliations	4	2	-	-	9	16
Illegal builders are not dealt with adequately	3	-	-	4	-	-
Warranty is unclear/Too subjective as to what is covered	1	6	6	-	20	-

Source: F4. And what are those issues or major concerns? Base: F3A = "Yes", Had issues with Tarion or major concerns about changes they've made in the last year (2022: N=69, 2021: N=50; 2019 N=28)

Builders from Zones 1, 7 and 12/13 find that conciliation/warranty processes are more difficult in comparison to builders from other Zones.

Major Issues / Concerns in %s	Total	ZONE 1	ZONE 2/4	ZONE 3	ZONE 5	ZONE 6/8/9/10/11	ZONE 7	ZONE 12/13
N=*	69	10	8	21	4	7	13	6
Conciliation/Warranty process is difficult for builder	14	20	-	10	-	14	23	33
HCRA is difficult/Confusing/Did not find them helpful/Prefer to only deal with Tarion	14	20	-	14	-	-	23	33
Poor customer service/Don't provide help/Don't answer questions	12	-	-	10	50	14	23	-
Hard to reach/Don't answer phone/Don't call back/Slow to call back	12	10	13	10	-	14	15	17
Online features are difficult to access/Not accessible	12	20	13	5	25	29	-	17
Decisions are unfair to the builder/Inconsistent/Unbalanced	10	10	13	19	-	14	-	-
Costs of fees/Deposits etc.	9	-	13	14	25	14	-	-
Warranty standards keep changing/Keeps getting harder for the builder	7	-	-	14	-	14	8	-
HCRA is slow/Bureaucratic	7	-	-	14	-	14	8	-
Tarion doesn't listen to builders/Ignores builder input	6	-	13	14	-	-	-	-
Tarion solicits/Charges for conciliations	4	-	-	14	-	-	-	-
Illegal builders are not dealt with adequately	3	-	-	-	-	14	8	-
Warranty is unclear/Too subjective as to what is covered	1	10	-	-	-	-	-	-

Source: F4. And what are those issues or major concerns? Base: F3A = "Yes", Had issues with Tarion or major concerns about changes they've made in the last year?

*Please use caution making any conclusions based on the chart above due to small sample sizes

Suggested Improvements to Assist Builders

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

1-in-5 builders want Tarion to improve communications and ensure that Tarion is more knowledgeable and able to answer questions (23%).

The second improvement that builders would like to see is Tarion responding quicker to the inquiries (21%).

Improvements to Assist Builders	'22 %s	'21 %s	'20 %s	'19 %s	'18 %s	'17 %s
Communication - Be more knowledgeable/Listen/Answer questions	23	9	4	5	12	9
Communication - Be available/Respond faster	21	16	13	11	17	12
Communication - More information/Up-to-date information/Bulletins	13	7	5	9	11	15
Warranty - More consistent process/More balanced/Fair decisions	8	11	11	13	18	20
Warranty - Make it less complex/Easier to understand	8	4	7	8	10	10
Website - Easier to navigate/Find things/Better organization	5	3	2	1	3	5
Costs - Reduce costs/Fees	4	4	10	3	7	7
Builders - Regulate/Monitor/Rate/Enforce standards	3	3	-	-	4	4
Builders - Crack down on illegal/Non-licensed builders	1	2	3	4	4	4
Website - Easier to user/More user-friendly/Improve it	1	-	5	7	8	4
Process - Simplify it/More Efficient/Be Fair	-	-	-	14	-	-

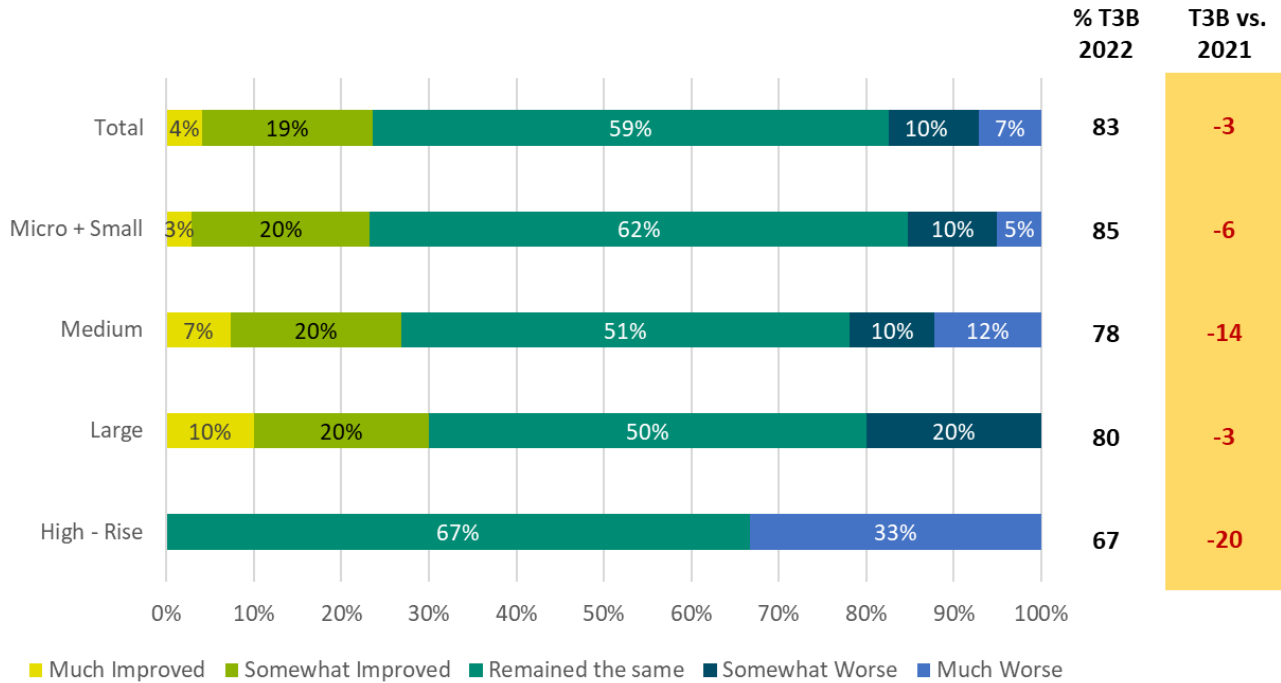
Source: FSA. From your perspective, what is the most important improvement Tarion could make to assist builders in the next year or two? (N=151)

Commitment to Customer Service

About 8-in-10 builders continue to indicate that Tarion’s commitment to customer service has improved or stayed the same (83%); however, Tarion’s ongoing commitment to customer service perception have declined by 3% this year (that is, there was a decline in the percent of builders saying the commitment improved or remained the same). The decline was evident across most types of builders.

Slightly over half of all builders (59%) believe that Tarion’s commitment remained the same to Customer Service over the past year.

About 2-in-10 builders (235) believe that the Tarion’s customer service has improved over the past year, a drop of 11% from 2021 (34%). High-rise builders were least likely than other categories to say that Tarion’s customer service has not improved, at 67%.

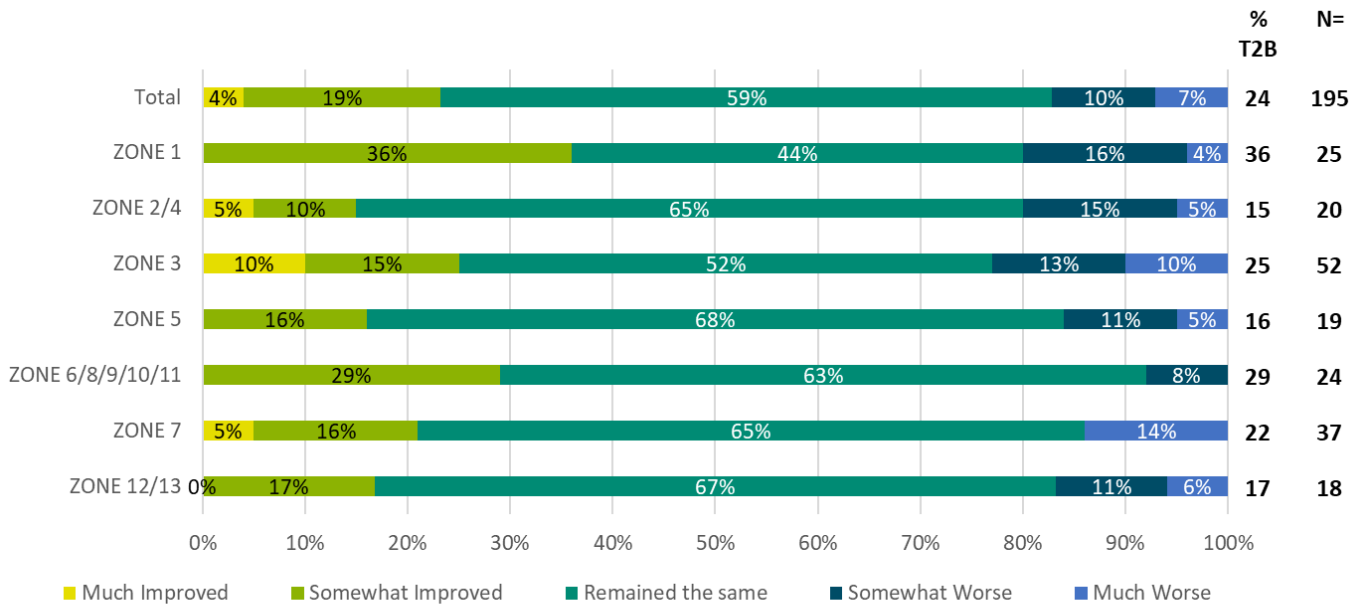


Source: F2A. Over the past year, how has Tarion's commitment to customer service changed? Would you say it is... (N=195)

*Note: the satisfaction performance have changed from the last two years to the last year in 2022.

Builders from Zone 1 were most likely to report Tarion’s commitment to Customer service has either somewhat or much improved, at 36%.

Builders from Zones 2 and 4, and Zone 5 were least likely to report somewhat or much improved, at 15% and 16%, respectively.



Source: F2A. Over the past year, how has Tarion's commitment to customer service changed?
 Would you say it is... (N=195)
 *Note: the satisfaction performance have changed from the last two years to the last year in 2022.

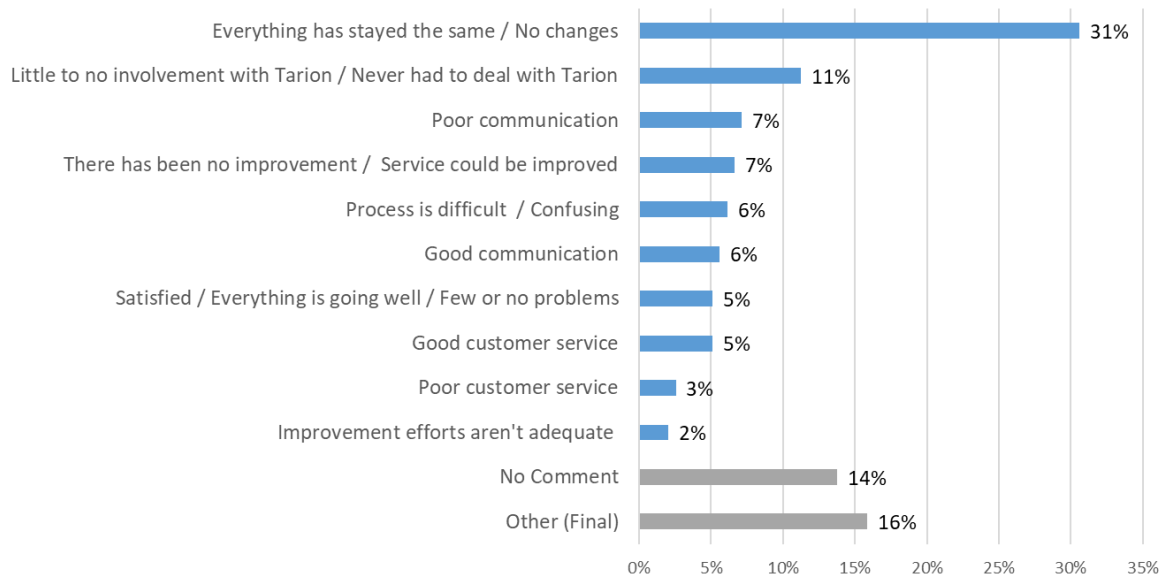
Builders were asked to specify reasons for their ratings on Tarion’s commitment to customer service on an open-ended basis.

Nearly one-in-third of all builders reported that their ratings of Tarion’s ongoing commitment to customer service did not change (31%).

11% of builders reported that they have little to no involvement with Tarion.

7% reported poor communication has a key concern.

Another 7% of builders reported that there has been no improvement in Tarion’s service, despite there being room for improvement.



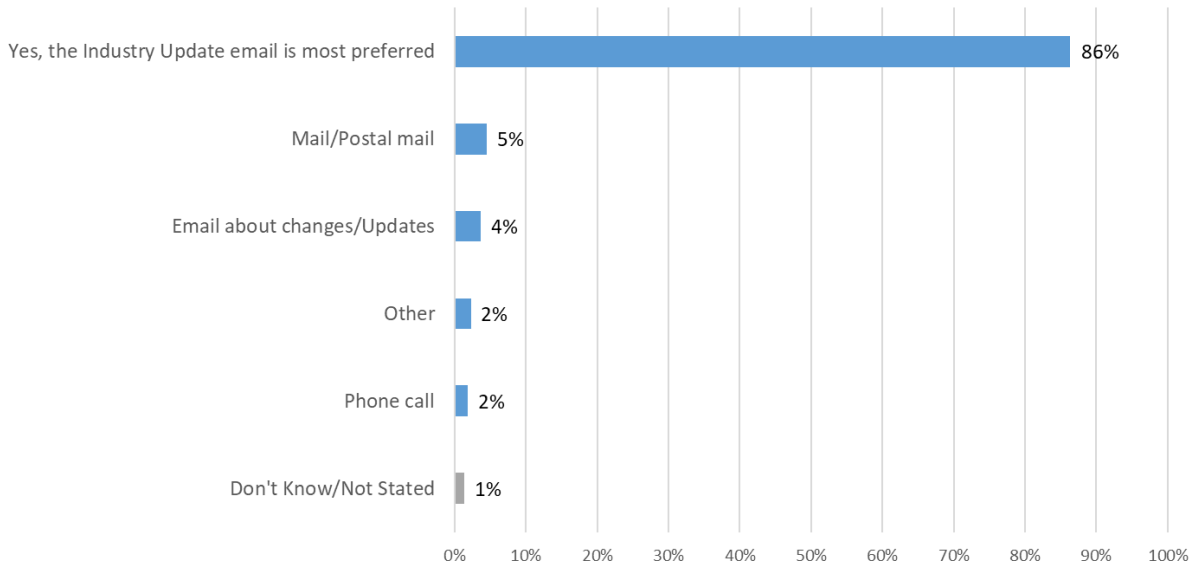
Source: F2AO. Why did you rate Tarion's commitment to customer service change in the past year as <F2A>? (N=195)

*Note: the satisfaction performance have changed from the last two years to the last year in 2022.

Channels

Primary Method of Communication

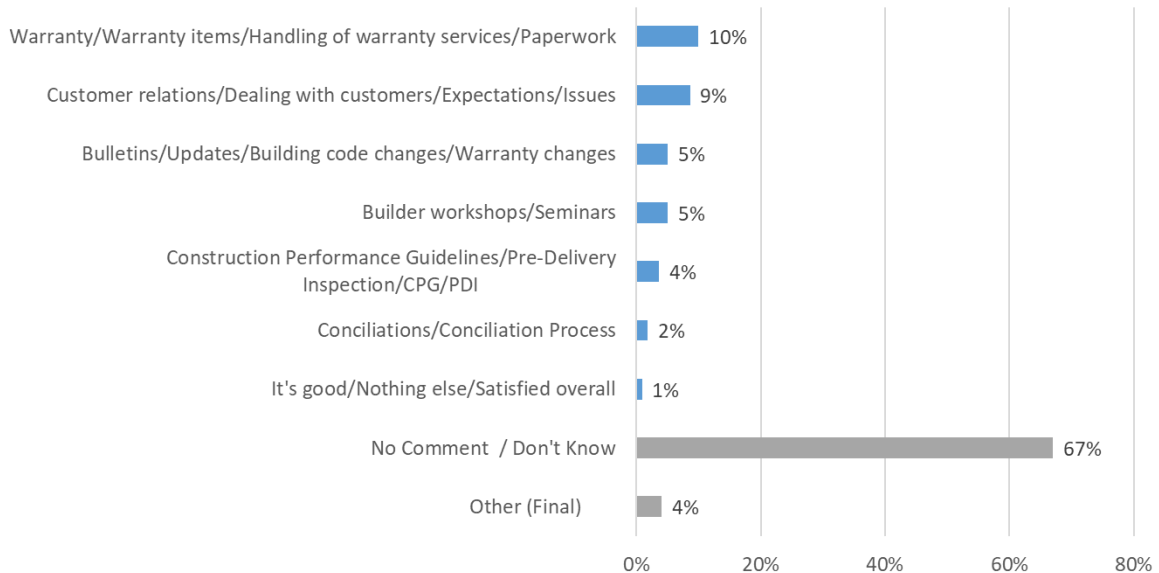
Respondents overwhelmingly preferred the industry update email, at 86%. 5% preferred to be notified of changes in policy by mail.



Source: F5C. When Tarion does make a change in policy, the Industry Update email is currently the primary method of communicating change. Is this email communication your most preferred method of being advised of change or is there another more suitable communication channel for you? (n=220)

Educational Resources

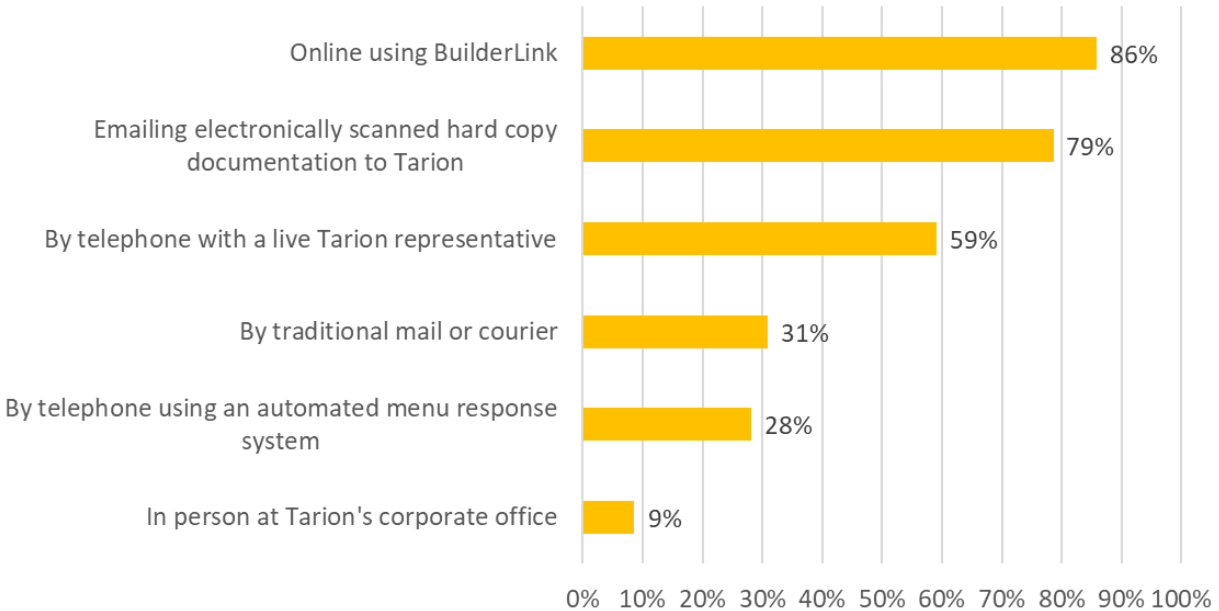
When asked which topics would be valuable to stakeholders, 10% of builders reported educational resources on warranty-related topics would be valuable. This is followed by topics on customer relations. 5% of builders reported updates and building code changes would be valuable.



Source: F5D. Tarion's Stakeholder Relations team offers a variety of educational resources through Builder Updates and specific education sessions. Which topics would be valuable to your staff and business? (n=220)

Most Desirable Channels for Common Builder Transactions

BuilderLink is the most preferred channel of interacting with Tarion for common transactions (86%), followed by 79% using email, sending electronic hardcopy documentation, and speaking with a live agent (59%).



Source: H1. Now I'd like you to think about how you or others in your company complete common transactions with Tarion including new home enrollments. Which of these channels do you/people in your company use to interact with Tarion? (n=220)

Builders from Zone 1 were least likely to use Builderlink to interact with Tarion at 79%.

Builders from Zones 2 and 4 were significantly less likely to email electronically to Tarion at 48% and speak with Tarion's live representative at 33% then all other builders.

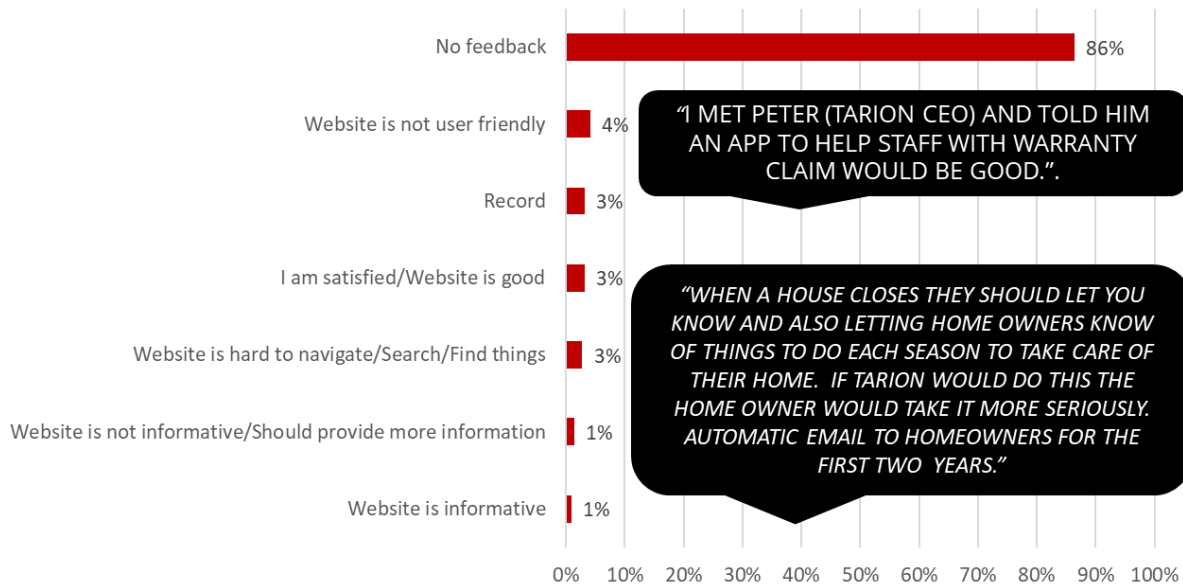
Major Issues / Concerns in %s	Total	ZONE 1	ZONE 2/4	ZONE 3	ZONE 5	ZONE 6/8/9/10/11	ZONE 7	ZONE 12/13
Online using BuilderLink	86	79	86	88	91	89	83	87
Emailing electronically scanned hard copy documentation to Tarion	79	68	48	86	82	85	85	78
By telephone with a live Tarion representative	59	61	33	62	64	63	66	52
By traditional mail or courier	31	25	43	36	36	30	29	13
By telephone using an automated menu response system	28	29	29	29	32	19	39	13
In person at Tarion's corporate office	9	14	-	5	14	7	17	-
No preference / All are suitable	1	4	-	2	-	-	-	-

Source: H1. Now I'd like you to think about how you or others in your company complete common transactions with Tarion including new home enrollments. Which of these channels do you/people in your company use to interact with Tarion? (n=220)

Tarion.com Website Feedback

When builders were asked to provide feedback about the tarion.com public website, the majority did not provide any comments (86%).

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



Source: H4. Do you have any comment or feedback about the tarion.com public website?
If so, please provide them. (N=220).

APPENDIX
2022 Builder Impressions Survey

Market Experiences

C1. To begin, we have a couple of questions about issues that may have affected your business (e.g., the COVID-19 outbreak, trade strikes, housing affordability, etc.).

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

- Fewer workers allowed on site due to physical distancing guidelines
- Trade unavailability or scheduling issues
- Material shortages
- Delays in obtaining permits
- Delays in municipal inspections
- Problems with meeting closing dates
- Issues with sales and closings
- Other (please specify)

C2. In the next 12 months, would you say new residential building activity will increase, remain the same, or decrease?

- Increase
- Remain the same
- Decrease
- Don't Know/Not Stated

C3. What would you say is the ONE big challenge facing your company over the next 12 months? (open-ended)

About Tarion

D1. Now onto the Tarion questions. Based on your own experience with TARION, would you say your opinion of the organization is:

- Very favourable
- Somewhat favourable
- Somewhat unfavourable
- Very unfavourable
- Don't Know/Not Stated

D1AO. Why did you say your opinion of Tarion is <D1A>?

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

- Extremely comfortable
- Very comfortable
- Somewhat comfortable
- Somewhat uncomfortable
- Very uncomfortable
- Don't know/not stated

D5. Are you or someone in your company using BuilderLink?

- Yes
- No

D8A_NEW_1. If no, why not? (open-ended)

D8A_NEW_2. If yes, do you use the Electronic Funds Transfer function?

- Yes
- No

D8A_NEW_3. If no, why not? (open-ended)

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

- Yes
- No

D4A. Which teams do you deal with the most regarding warranty matters?

- Freehold
- Common Elements

D5. Which ONE contact area or department are you most likely to start with if you need to contact Tarion?

- Customer Service Centre/Toll-free line/customerservice@tarion.com
- Stakeholder Relations [Specify Contact]
- Underwriting [Specify Contact]
- Warranty Services [Specify Contact]
- Technical Desk
- Other (Specify)
- Don't know / Not Stated

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

- a) Tarion is easy to do business with
 - o D6AO. Why did you say <D6A> on how Tarion is easy to do business with?
- b) Tarion listens to the needs and concerns of builders (open-ended)
 - o D6BO. Why did you rate Tarion listens to the needs and concerns of builders as <D6B>? (open-ended)
- c) Tarion encourages builders to provide homeowners with good customer service
- d) Tarion has improved the way that it interacts and communicates with builders
- e) Tarion is accessible to builders
 - o D6EO. Why did you rate Tarion is accessible to builders as <D6F_NEW>? (open-ended)
- f) Tarion does a good job of resolving warranty disputes between homeowners and builders
- g) Tarion makes transparent, fair, and impartial decisions
- h) Tarion's Stakeholder (Relations Department provides useful information, tools and advice
- i) Tarion does its part to educate builders about important warranty and construction matters
- j) Tarion is consistent when applying policies and processes
- k) Tarion's Warranty Services provides timely and consistent service
- l) Tarion's Underwriting department provides timely and consistent service.

F1. How satisfied are you with Tarion's overall performance over the last year? Are you:

- Extremely Satisfied
- Very satisfied
- Somewhat Satisfied
- Somewhat dissatisfied
- Very dissatisfied
- Don't Know/Not Stated

F1AO. If you responded very dissatisfied, can you tell us why? (open-ended)

F2. Over the past year, how has Tarion's commitment to customer service changed? Would you say it is:

- Much Improved
- Somewhat Improved
- Remained the same
- Somewhat Worse
- Much Worse
- Don't Know/Not Stated

F2AO. If you responded 'much worse', can you tell us why?

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

- Yes
- No

F4. IF YES: And what are those issues or major concerns? (open-ended)

F5. IF NO: From your perspective, what is the most important improvement Tarion could make to assist builders in the next year or two? (open-ended)

F5C. When Tarion does make a change in policy, the Industry Update email is currently the primary method of communicating change. Is this email communication your most preferred method of being advised of change or is there another more suitable communication channel for you?

- Yes, the Industry Update email is most preferred
- No, other communication channel (Specify)
- Don't Know/Not Stated

F5D. Tarion's Stakeholder Relations team offers a variety of educational resources through Builder Updates and specific education sessions. Which topics would be valuable to your staff and business? **(open-ended)**

F6. Taking all things into consideration, how would you rate your overall relationship with Tarion? Would you say your relationship is:

- Excellent
- Very good
- Good
- Fair
- Poor
- Don't Have a Relationship with Tarion
- Don't Know/Not Stated

F7. If asked by another builder, how likely would you be to say positive things about Tarion? Would you say you:

- Definitely would
- Probably would
- Might or might not
- Probably would not
- Definitely would not
- Don't Know/Not Stated

Channel Preferences

H1. Now I'd like you to think about how you or others in your company complete common transactions with Tarion including new home enrollments. Which of these channels do you/people in your company use to interact with Tarion? Select all that apply and indicate your preferred method.

- Online using BuilderLink
- By telephone using an automated menu response system
- By telephone with a live Tarion representative
- In person at Tarion's corporate office
- By traditional mail or courier
- Emailing electronically scanned hard copy documentation to Tarion
- No preference / All are suitable
- Don't know / Not Stated

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

Classification Questions

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

- Yes
- No
- Don't Know/Not Stated

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

- Yes
- No
- Don't Know/Not Stated

G4. Does your company build primarily freehold or condominium homes?

- Freehold
- Condo
- Both
- Don't Know/Not Stated

G6. What is your role with the company?

- Principal/Owner
- Customer Service Manager
- Other __ please specify

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

- 5 or fewer
- 6 to 10
- 11 to 25
- More than 25
- Don't Know/Not Stated