

2025 BUILDER IMPRESSIONS



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Background and Methodology

Ipsos is a third-party research provider that conducted on behalf of Tarion a province-wide telephone-based survey among a specific group of registered new home builders. The purpose of the survey was to gain insights into builders' perceptions of Tarion, including their satisfaction with customer service and the overall image of Tarion.

Builders who had at least one possession in the previous 24 months and are in one of the following five possession categories:

- 🏠 Micro Builder (1-4 possessions)
- 🏠 Small Builder (5-20 possessions)
- 🏠 Medium Builder (21-100 possessions)
- 🏠 Large Builder (> 100 possessions)
- 🏢 Condominium Builder (> 100 possessions)

N=245 surveys were completed between September 23rd, 2025, to November 10th, 2025

YEAR	COMPLETES	SAMPLE	COMPLETION RATE	MICRO + SMALL	MEDIUM	LARGE	HIGH-RISE
2021	240	1,612	14.9%	150	65	13	12
2022	220	1,464	15.0%	159	43	12	6
2023	174	1,942	9.0%	99	49	19*	9*
2024	245	1,341	18.0%	149	51	17*	28*
2025	245	1,814	13.5%	162	55	13*	15*

Sample sizes less than 30 are qualitative in nature, and should be interpreted with caution. While the sample size for high-rise builders (n=15) remains small in absolute terms, it represents a substantial portion (8%) of the total population of high-rise builders who qualified for this year's survey. This improved representation, compared to previous years (6 and 9 respondents), offers valuable insight into their sentiments. However, the quality



SERVICE ORIENTATION INDEX

Service Orientation Index

TARION'S KPI - SERVICE ORIENTATION INDEX

KPI ELEMENTS (%)	2025	CHANGE VS. 2024	2024	2023	2022	2021
Tarion is easy to do business with	61	-2	63	64	56	68
Tarion listens to the needs and concerns of builders	62	-1	63	64	59	67
Accessible to builders	83	+6	77	82	71	81
Index	69	+1	68	70	62	72

Base: All respondents with a valid response (n=227-244)

B11. I am going to read you several statements, and I would like to know whether you strongly agree, somewhat agree, somewhat disagree, or strongly disagree with each statement. How about ...?

Service Orientation Index by builder size

TARION'S KPI – SERVICE ORIENTATION INDEX BY BUILDER SIZE

KPI ELEMENTS (%)	TOTAL	MICRO + SMALL	MEDIUM	LARGE*	HIGH-RISE*
Tarion is easy to do business with	61	63	52	62	73
Tarion listens to the needs and concerns of builders	62	67	46	55	69
Accessible to builders	83	84	80	85	80
Index (averaged)	69	71	59	67	74
<i>Change vs. 2024</i>	+1	+1	+3	-3	0

Base: All respondents with a valid response (n=227-244)

B11. I am going to read you several statements, and I would like to know whether you strongly agree, somewhat agree, somewhat disagree, or strongly disagree with each statement. How about ...?

*Cautious about sharing information with Tarion

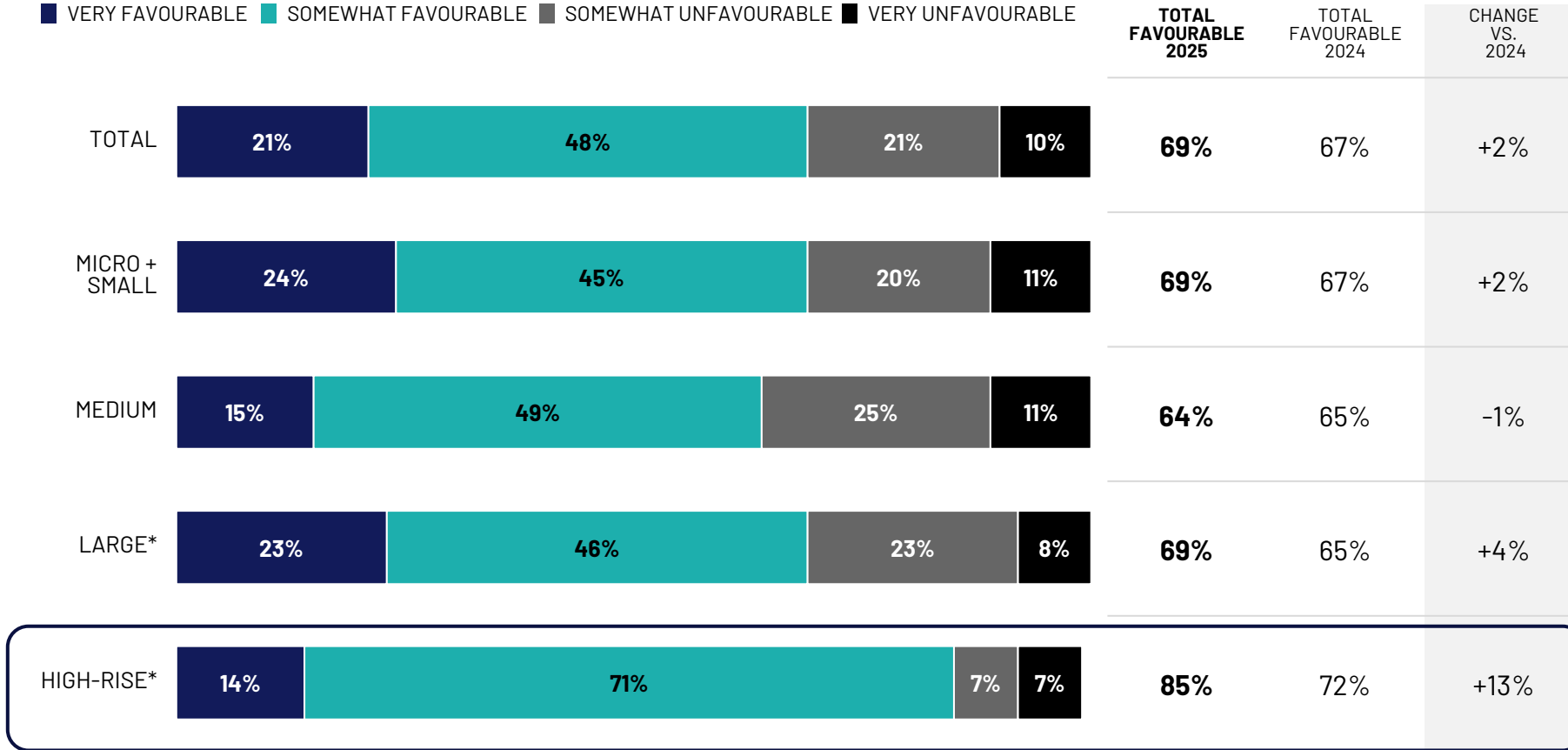


UNDERSTANDING THE EXPERIENCE WITH TARION / IMPRESSIONS OF TARION

Overall impressions

OVERALL IMPRESSIONS OF TARION BASED ON EXPERIENCE

■ VERY FAVOURABLE
 ■ SOMEWHAT FAVOURABLE
 ■ SOMEWHAT UNFAVOURABLE
 ■ VERY UNFAVOURABLE

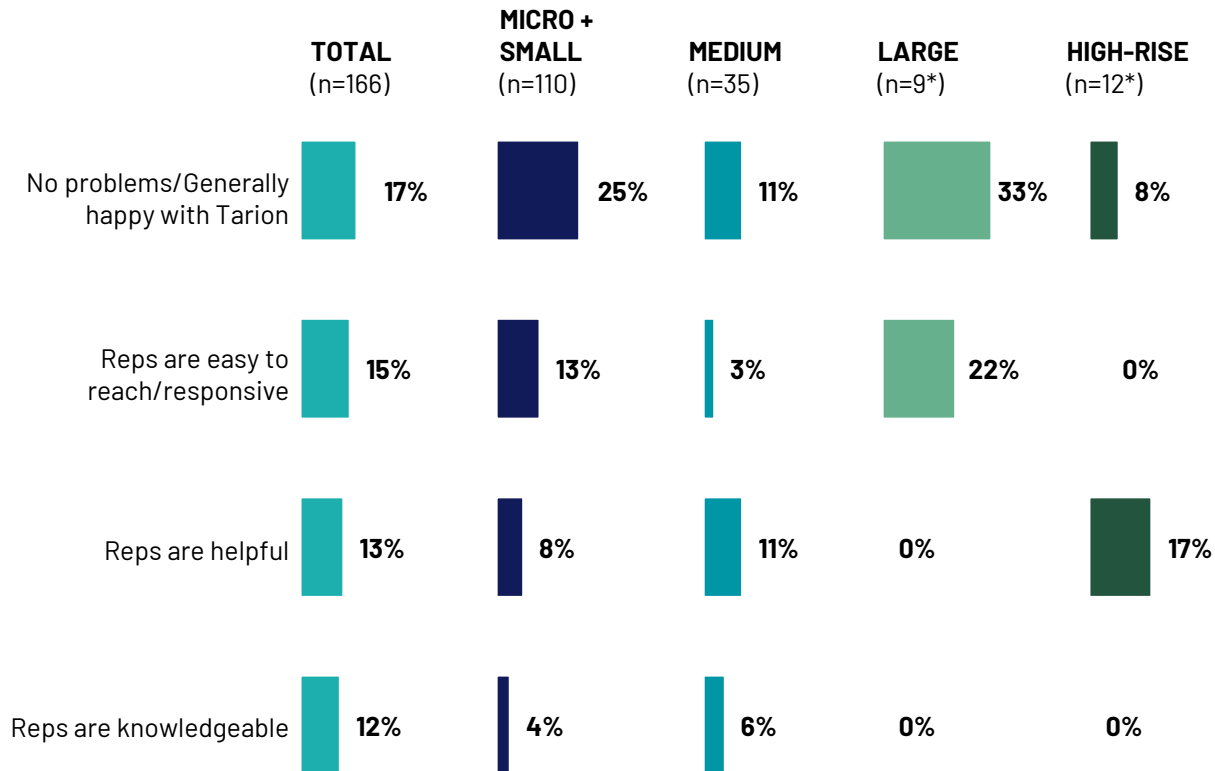


Base: Total n=245, Micro + Small n=162, Medium n=55, Large n=13*, High-Rise n=15*
 B2. Based on your own experience with Tarion, would you say your opinion of the organization is ...?
 *Caution



Top reasons for a favourable impression of Tarion.

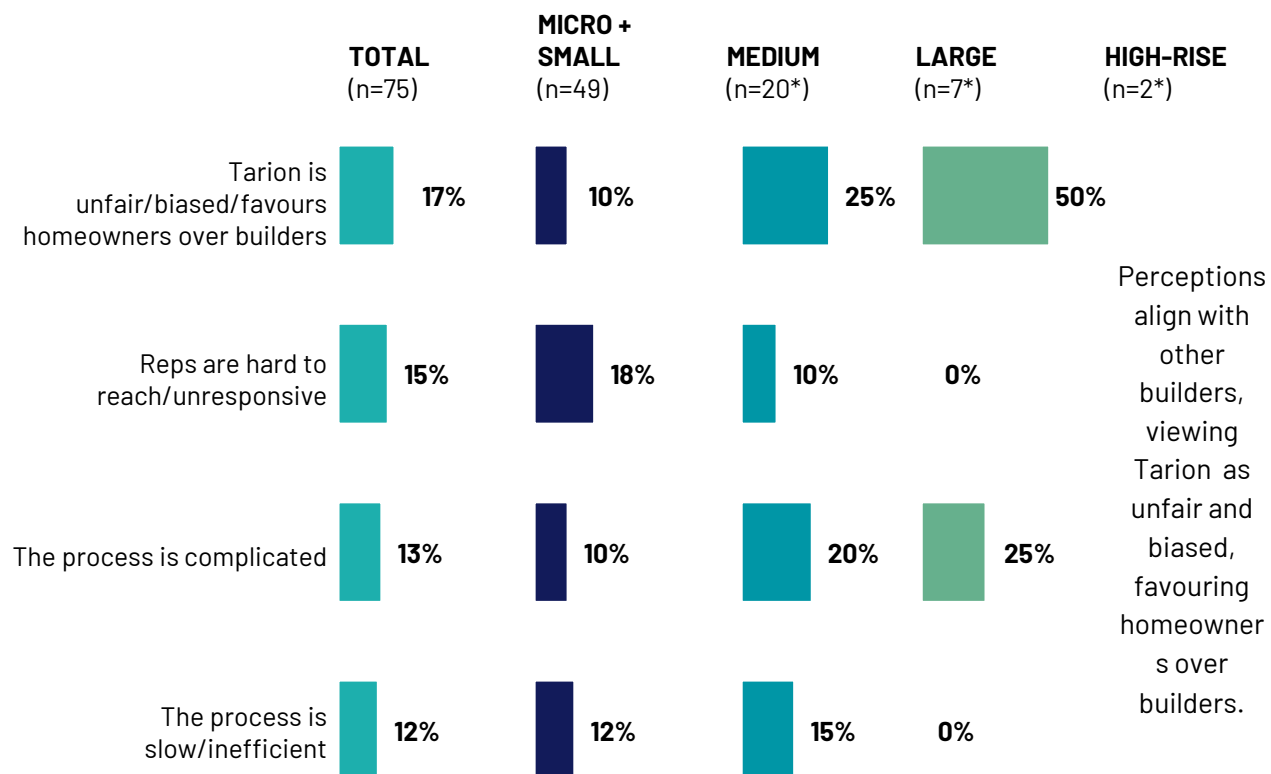
TOP REASONS FOR FAVOURABLE RATING



Base: All respondents with a valid response
 B3. Why did you say your opinion of Tarion is <B2 RESPONSE>?
 H1 - Is there anything else that you would like to tell us about Tarion?
 *Caution: Very small sample sizes. Results are qualitative in nature.

Top reasons for an unfavourable impression of Tarion.

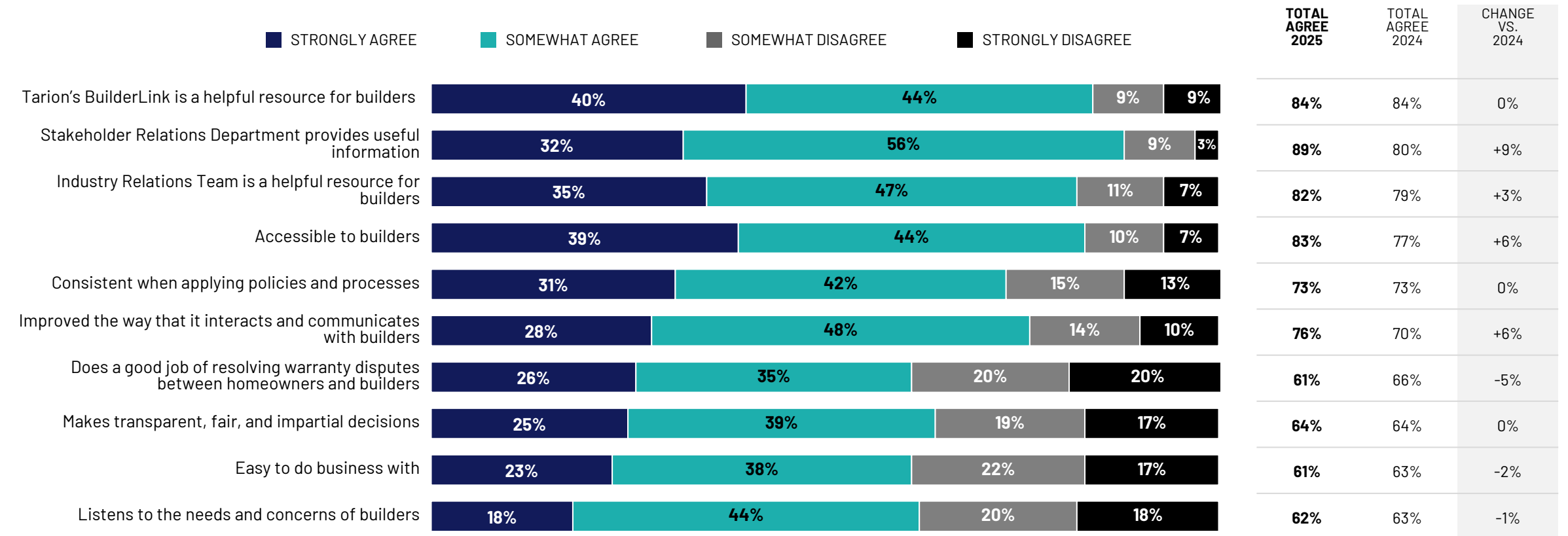
TOP REASONS FOR UNFAVOURABLE RATING



Base: All respondents with a valid response
 B3. Why did you say your opinion of Tarion is <B2 RESPONSE>?
 H1 - Is there anything else that you would like to tell us about Tarion?
 *Caution: Very small sample sizes. Results are qualitative in nature.

Builder impressions

SPECIFIC IMPRESSIONS OF TARION

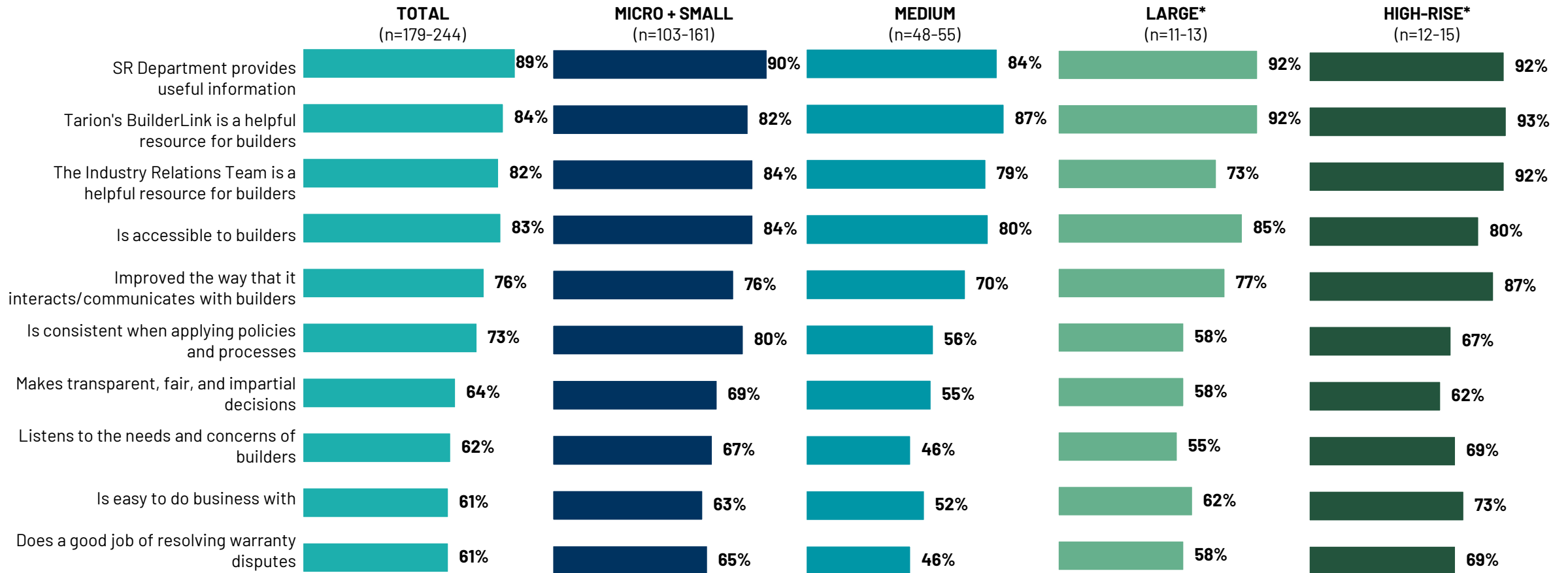


Base: All respondents (n=179-244)

B11. I am going to read you several statements, and I would like to know whether you strongly agree, somewhat agree, somewhat disagree, or strongly disagree with each statement. How about ...?

Impressions by builder size

SPECIFIC IMPRESSIONS OF TARION (% STRONGLY/SOMEWHAT AGREE)



B11. I am going to read you several statements, and I would like to know whether you strongly agree, somewhat agree, somewhat disagree, or strongly disagree with each statement. How about ...?

*Caution: Very small sample sizes. Results are qualitative in nature.