

2023 BUILDER IMPRESSIONS

Full Report

Prepared for Tarion

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 **TARION**
SUPPORTING YOUR NEW HOME WARRANTY


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TARION / IMPRESSIONS OF TARION



BACKGROUND AND METHODOLOGY

Background and Methodology

- Tarion commissioned Ipsos to conduct a province-wide telephone-based (CATI) survey among a sample 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.
- Builders who had at least one possession in the previous 24 months and are in one of the following five possession categories:
 - Small Volume (5-20 possessions)
 - Including Micro (1-4 possessions)
 - Medium Volume (21-100 possessions)
 - Large Volume (> 100 possessions)
 - Condominium (> 100 possessions)
- N=174 surveys were completed. This final BSAT KPI report will focus on respondents who completed the survey between September 20th, 2023 to October 5th, 2023 and November 27th, 2023 to December 8th, 2023

YEAR	COMPLETES	SAMPLE	COMPLETION RATE	MICRO + SMALL	MEDIUM	LARGE	HIGH-RISE
2016	264	1,719	15.4%	100	87	21	56
2017	270	1,632	16.5%	102	100	38	30
2018	267	1,546	17.3%	151	73	25	18
2019	206	1,570	13.1%	135	42	16	13
2020	245	1,713	14.3%	151	64	16	14
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*

**Very small sample sizes. Interpret with caution*



SERVICE ORIENTATION INDEX

Tarion's service orientation index has improved vs. 2022

SERVICE ORIENTATION INDEX

KPI ELEMENTS (%)	2023	CHANGE VS. 2022	2022	2021	2020	2019	2018	2017	2016	2015
Tarion is easy to do business with	63	+7	56	68	69	75	78	82	80	78
Tarion listens to the needs and concerns of builders	63	+4	59	67	67	64	72	77	77	76
Accessible to builders	82	+11	71	81	79	78	86	91	92	90
Index	69	+7	62	72	72	72	79	83	83	82

Base: All respondents with a valid response (n=160-169)

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 ...?

This improvement is driven from improvements in the Micro/Small and Medium categories

SERVICE ORIENTATION INDEX BY BUILDER SIZE

KPI ELEMENTS (%)	TOTAL	MICRO + SMALL	MEDIUM	LARGE	HIGH-RISE
Tarion is easy to do business with	63	61	63	74	78
Tarion listens to the needs and concerns of builders	63	57	68	78	78
Accessible to builders	82	78	85	94	78
Index (averaged)	69	65	72	82	78
<i>Change vs. 2022</i>	+7	+5	+6	+10	+6

Caution: Very small sample size (n=19). Interpret with caution

Caution: Very small sample size (n=9). Interpret with caution

Base: All respondents with a valid response (n=160-169)

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 ...?



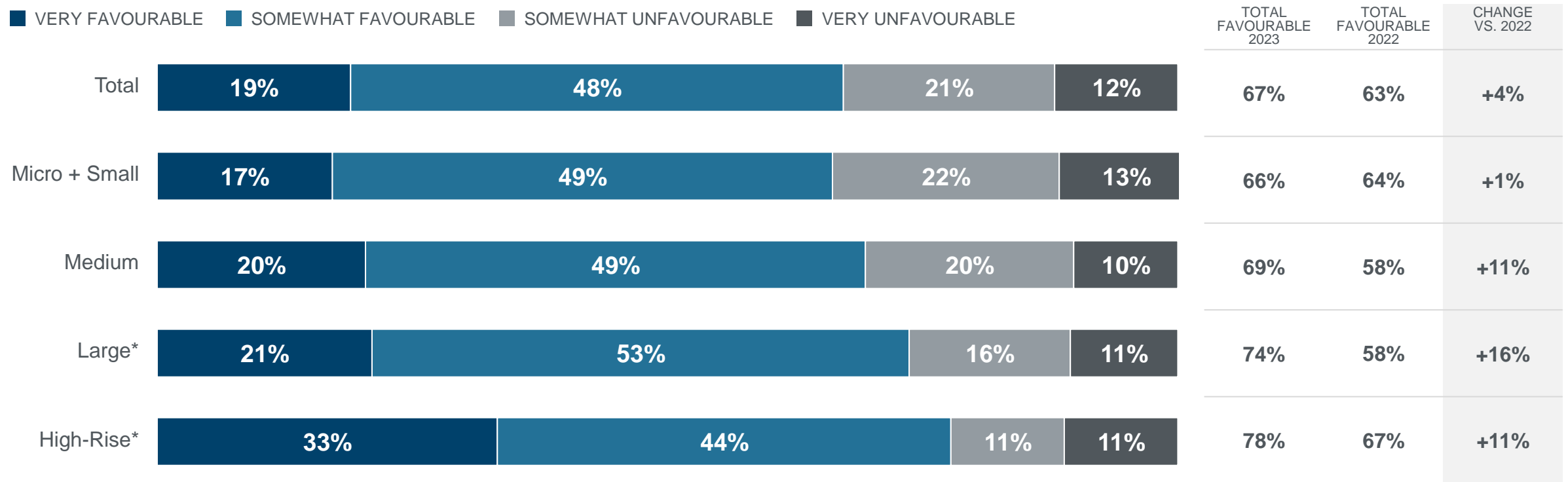
UNDERSTANDING THE EXPERIENCE WITH TARIION / IMPRESSIONS OF TARIION

Improved perceptions of Tarion's service has resulted in an increase in favourability since 2022

Largest gains since 2022 are among Medium, Large, and High-rise builders

OVERALL IMPRESSIONS OF TARION BASED ON EXPERIENCE

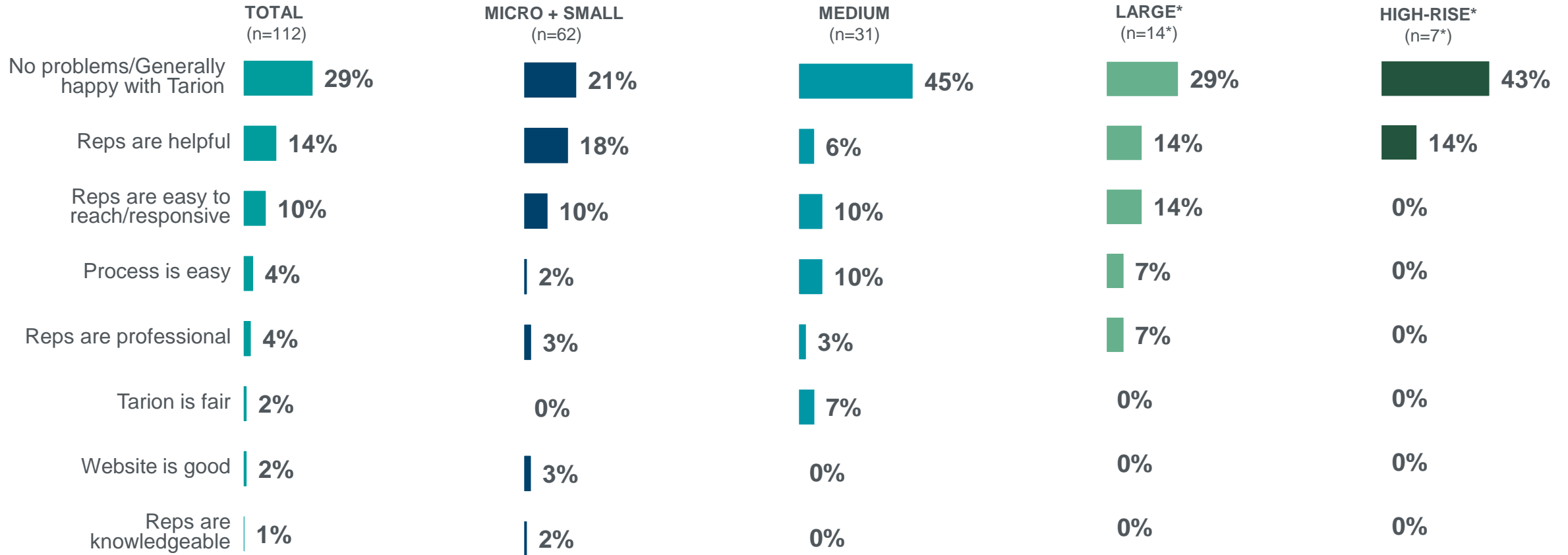
■ VERY FAVOURABLE
 ■ SOMEWHAT FAVOURABLE
 ■ SOMEWHAT UNFAVOURABLE
 ■ VERY UNFAVOURABLE



Base: Total n=174, Micro + Small n=99, Medium n=49, Large n=19*, High-Rise n=9*
 B2. Based on your own experience with Tarion, would you say your opinion of the organization is ...?
 *Caution: Very small sample size. Interpret with caution.

Main reasons for having a favourable impression of Tarion

REASON FOR FAVOURABLE RATING

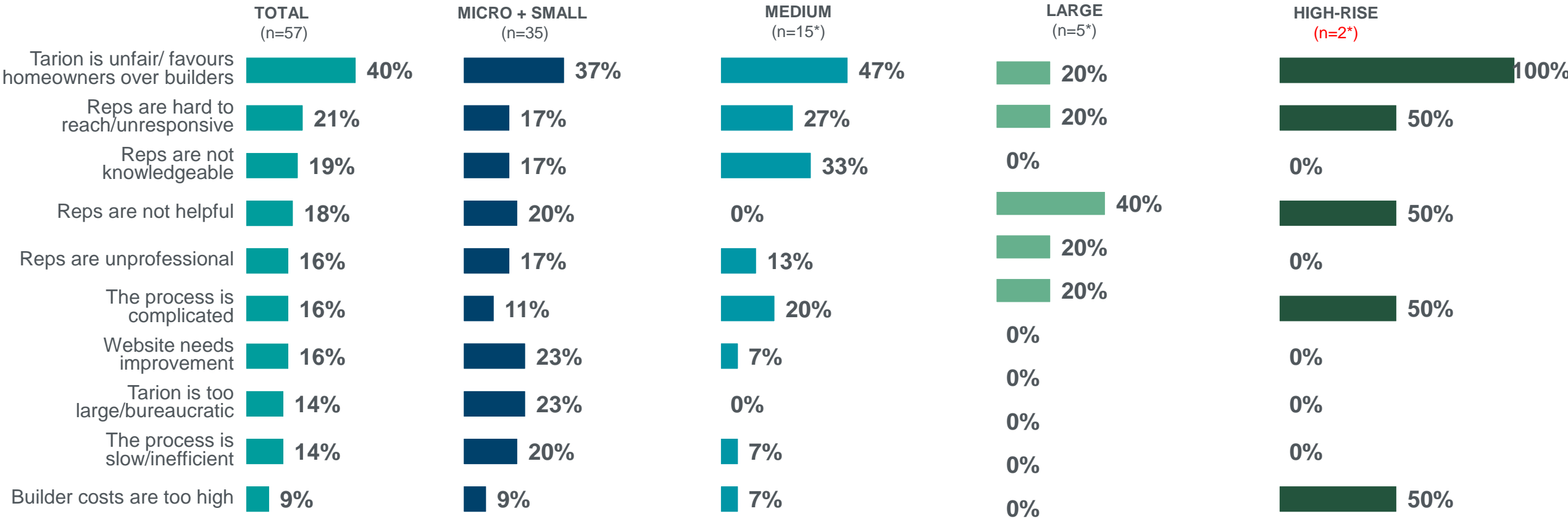


B3. Why did you say your opinion of Tarion is <B2 RESPONSE>?

*Caution: Very small sample size. Interpret with caution.

Main reasons builders don't hold a favourable opinion of Tarion

REASON FOR UNFAVOURABLE RATING



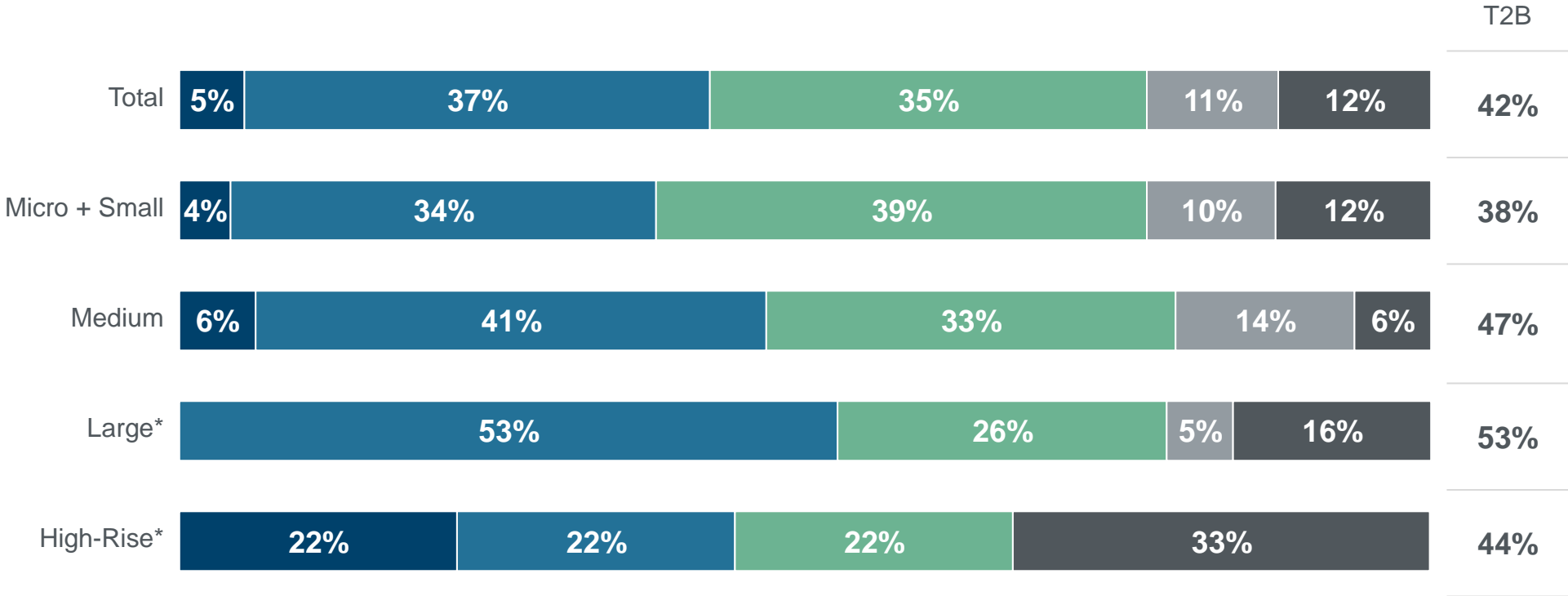
B3. Why did you say your opinion of Tarion is <B2 RESPONSE>?

*Caution: Very small sample size. Interpret with caution.

Overall, builders are comfortable with Tarion’s digital tools

COMFORT LEVEL INTERACTING WITH TARION’S DIGITAL TOOLS OR PLATFORMS

■ EXTREMELY COMFORTABLE
 ■ VERY COMFORTABLE
 ■ SOMEWHAT COMFORTABLE
 ■ SOMEWHAT UNCOMFORTABLE
 ■ VERY UNCOMFORTABLE

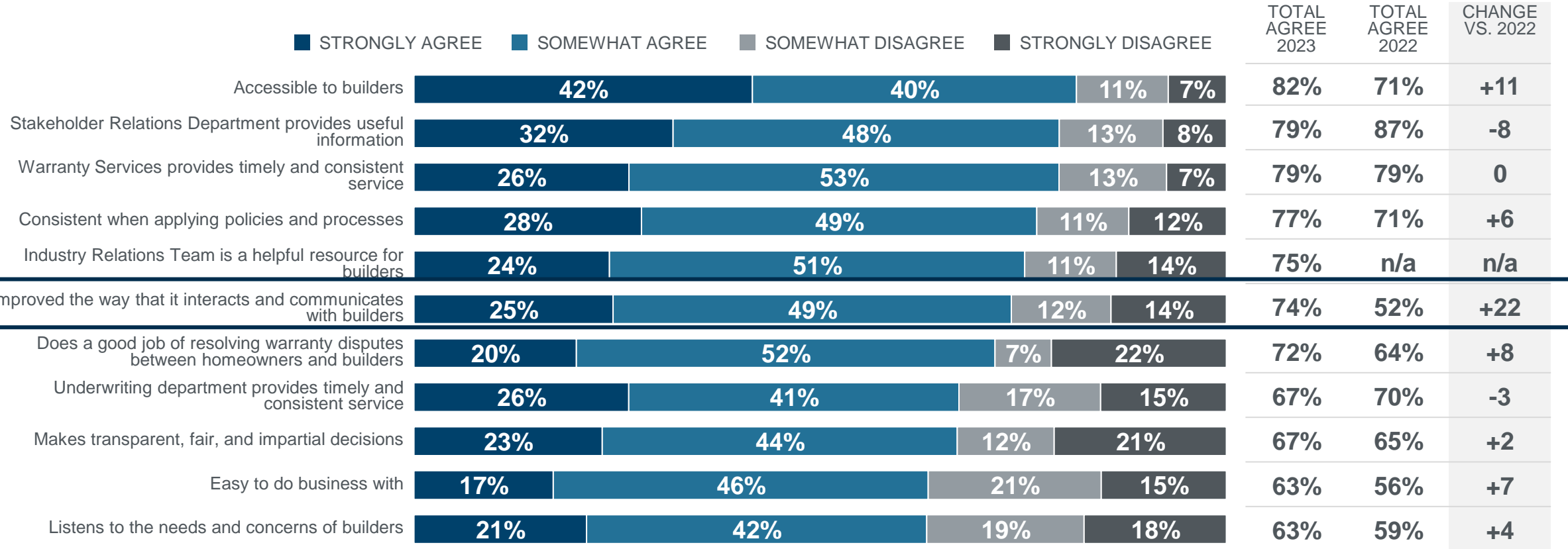


Base: All respondents with a valid response: Total n=172, Micro + Small n=97, Medium n=49, Large n=19*, High-Rise n=9*
 B4. What is your general comfort level with interacting with Tarion’s digital tools or platforms such as mobile apps, online payments, or BuilderLink?
 *Caution: Very small sample size. Interpret with caution.



Tarion is being recognized for improving communications with builders

SPECIFIC IMPRESSIONS OF TARION

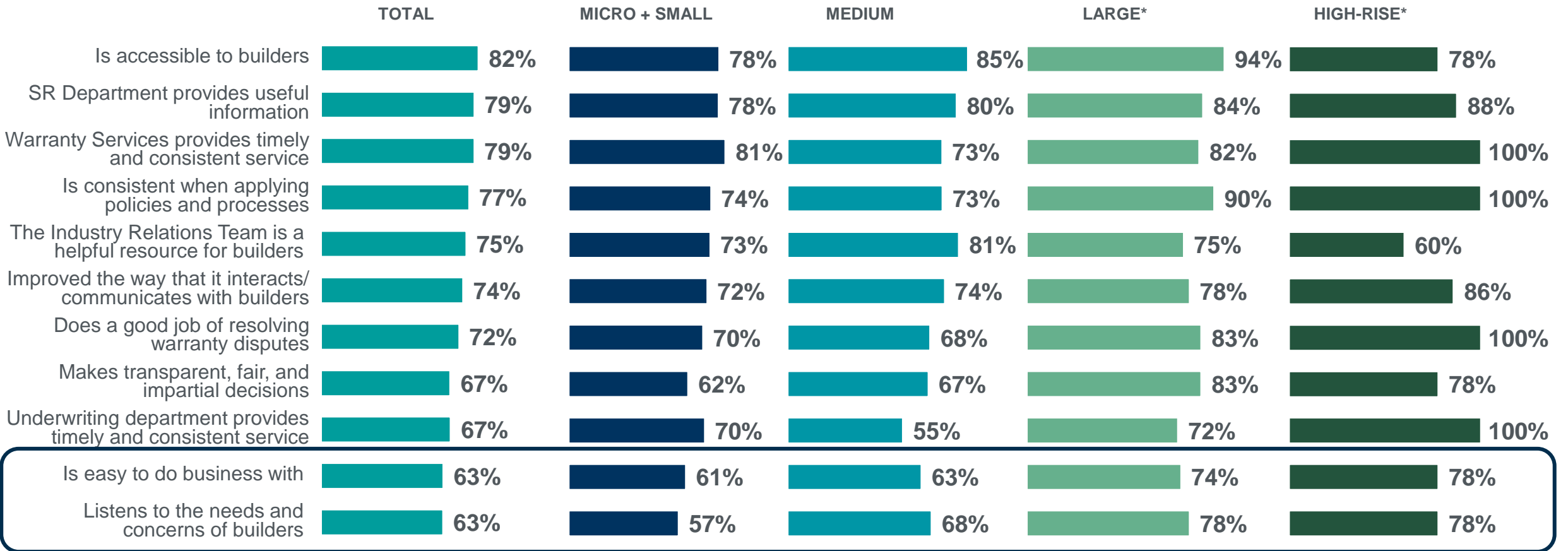


Base: All respondents (n=130-169)

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 ...?

Comparison of impressions of Tarion based on builder size

SPECIFIC IMPRESSIONS OF TARION (% STRONGLY/SOMEWHAT AGREE)



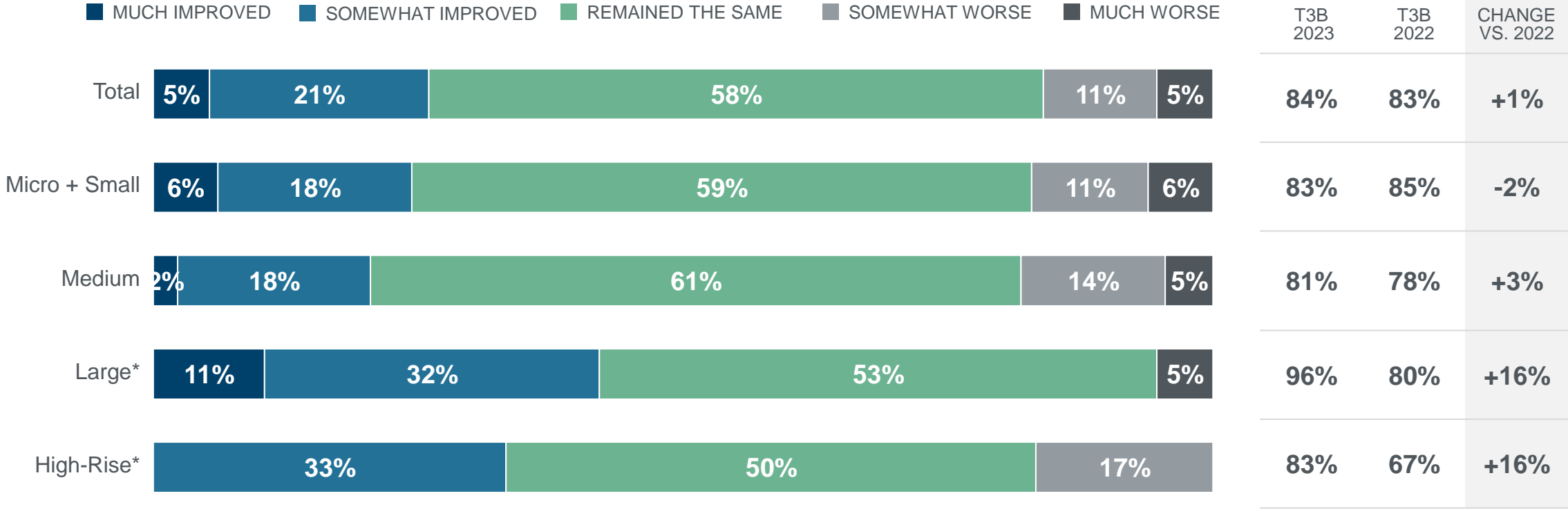
Base: All respondents with a valid response: Total n=130-169, Micro + Small n=69-95, Medium n=37-49, Large n=16-19*, High-Rise n=5-9*
 B11. I am going to read you several statements, and I would like to know whether you strongly agree, somewhat agree, somewhat disagree, or strongly disagree with each statement. How about ...?
 *Caution: Very small sample size. Interpret with caution.



The majority of builders indicate Tarion’s customer service has improved or stayed the same

Greatest gains are among Large and High-Rise builders

HOW TARION’S CUSTOMER SERVICE HAS CHANGED OVER PAST YEAR



Base: All respondents with a valid response: Total n=150, Micro + Small n=82, Medium n=44, Large n=19*, High-Rise n=6*
 B12. Over the past year, how has Tarion’s commitment to customer service changed? Would you say it has ...?

*Caution: Very small sample size. Interpret with caution.