

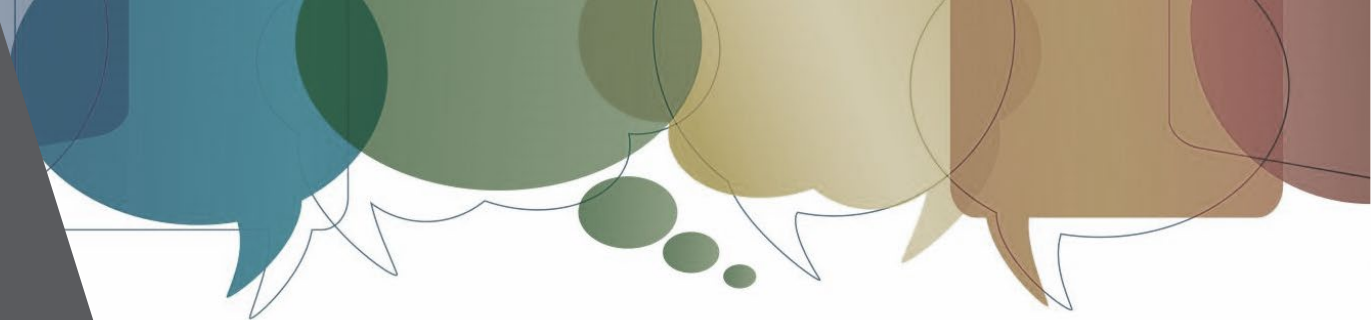


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MAY 2020 RESEARCH

PULSE REPORT ON COVID-19 – REPORT #26

CABINET OFFICE

May 29th 2020



KEY FINDINGS

Key Findings

1 Government's 'right track' scores have edged up slightly to 84%.

This slight rise has occurred after the release of the Canadian Forces report on the long-term care at five homes.

These early results suggest that the public has responded favourably to the government's actions in response to the report.

4 As the economy opens up and Ontarians' risk tolerance increases, support for a law requiring people to wear a mask if they can't maintain physical distance has been steadily increasing.

Put together with support for an across-the-board law, Ontarians are increasingly wanting some legal codification of mask wearing.

2 At the same time, after the release of the long-term care report, there has been a slight increase (46% to 53%) in the perceptions of Ontarians that not enough has been done to protect residents of long-term care homes.

In short, there is still a significant public concern about the situation in long-term care homes.

5 Ontarians overwhelmingly see a jobs and recovery plan as essential.

As of yet, they don't want the government to focus more on getting the economy moving and less on stopping the spread of COVID-19.

Most Ontarians recognize that they have to learn to live with the virus.

3 Ontarians are increasingly more likely to say that they are prepared to take 'some risk' in order to go back to work sooner. Early this week, this willingness was at 41% and it is now at 55%. At the same time, the proportion of Ontarians wanting to take 'no risk' dropped from 57% to 42%.

6 Almost two-thirds of Ontarians say that the primary focus of Ontario's jobs and recovery plan should be infrastructure spending. Only 32% preferred tax cuts.

Key Findings

7 About 7-in-10 say small businesses with under 50 employees have been the most hurt by the response to COVID-19.

And, Ontarians think that this type of business should be the focus of a jobs and recovery plan.

8 Ontarians identify 'agriculture/agri-food' and 'hospitality' as the two most important sectors for receiving help from a jobs and recovery plan.

The next three are 'manufacturing', 'retail', and 'technology/innovation'.

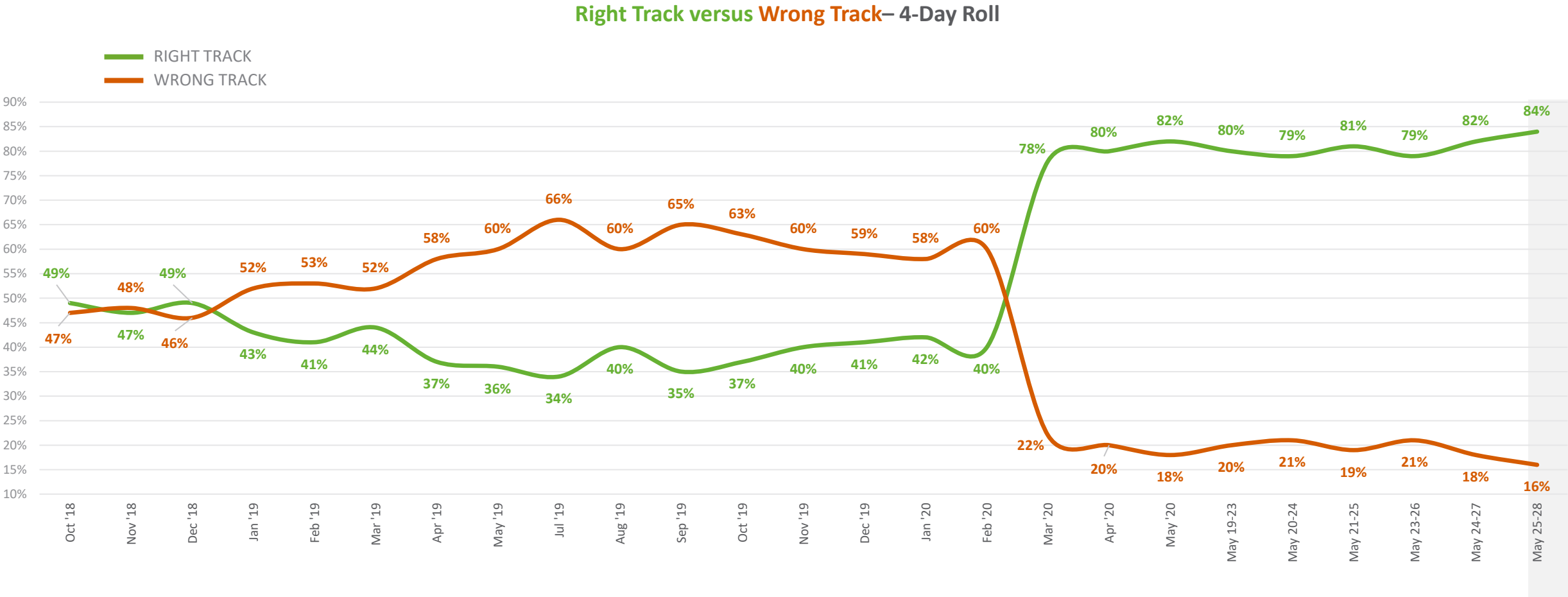
9 The findings indicate that consumer confidence is low during this period of the COVID-19 shutdown.

Confidence will likely be higher as the province moves to opening up the economy, but there is still be some reluctance to spend.

RIGHT TRACK
WRONG TRACK



The government’s ‘right track’ scores have edged up slightly (from 79% to 84%) over the past three days after the release of the Canadian Forces report on long-term care homes.

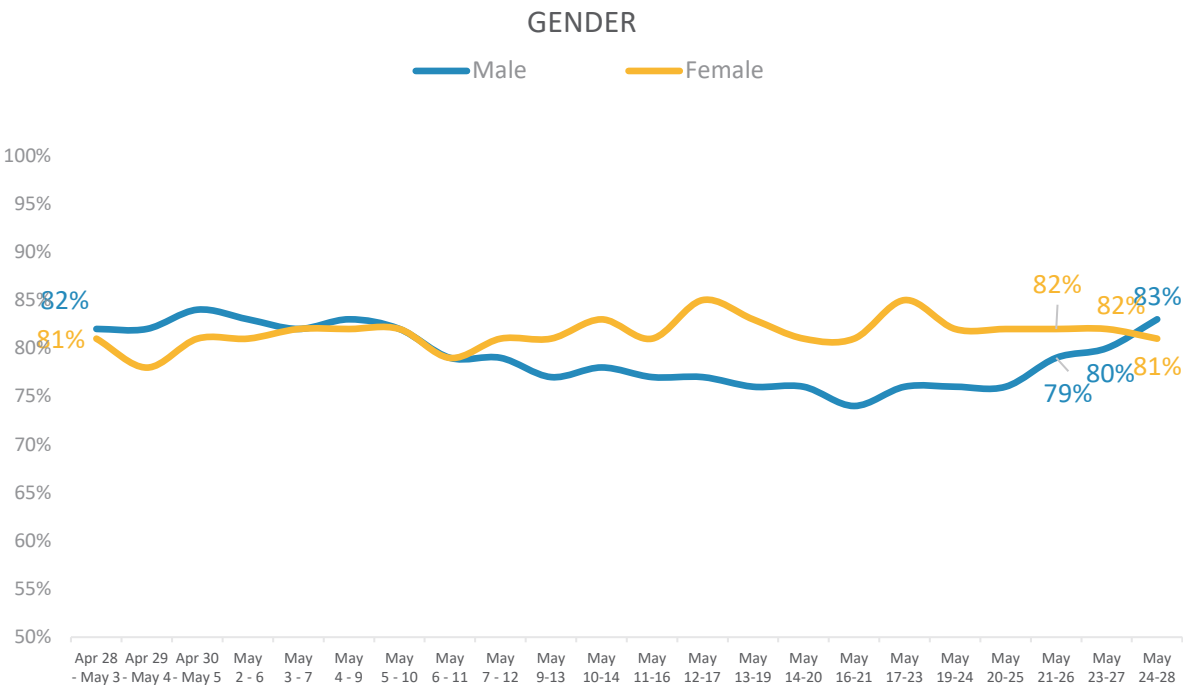
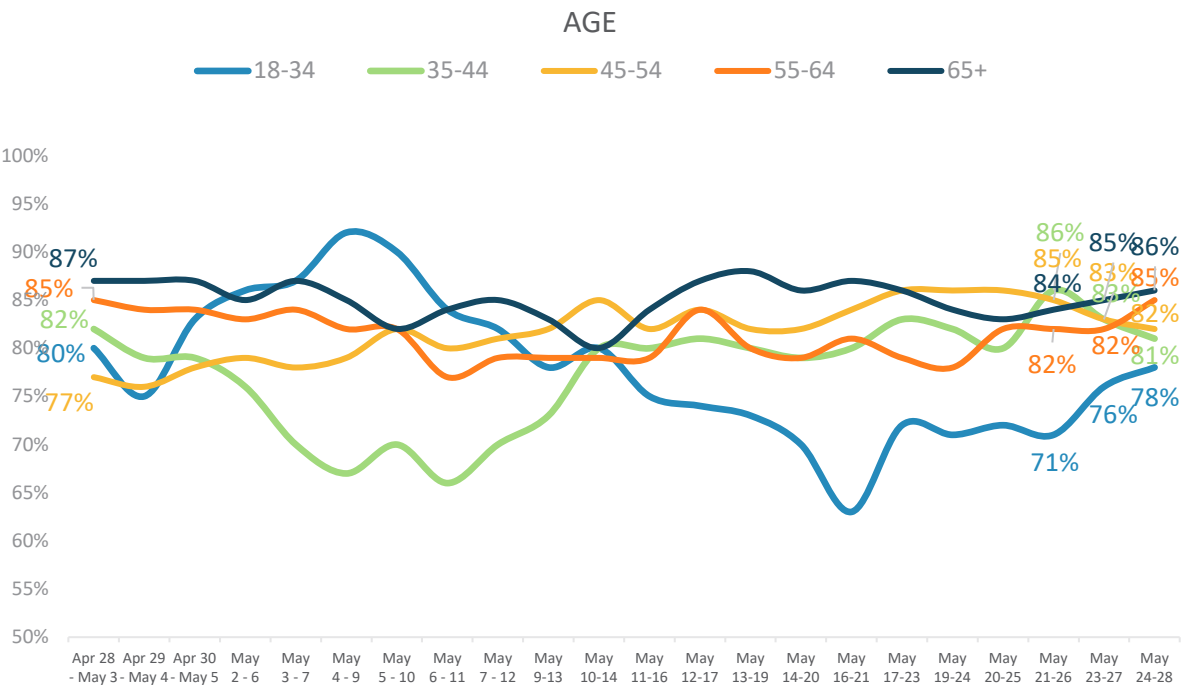


These graphs are based on 4 day roll in order to boost the sample sizes.

Q2. Overall, do you feel that the Ontario provincial government is on the right track or the wrong track, in terms of how it is governing the province? Base: Total sample

The government’s ‘right track’ scores have increased among men, while women’s scores are stable. Plus, the ‘right track’ scores among those aged 18-34 years of age have moving upward.

Right Track Scores – 5-Day Roll

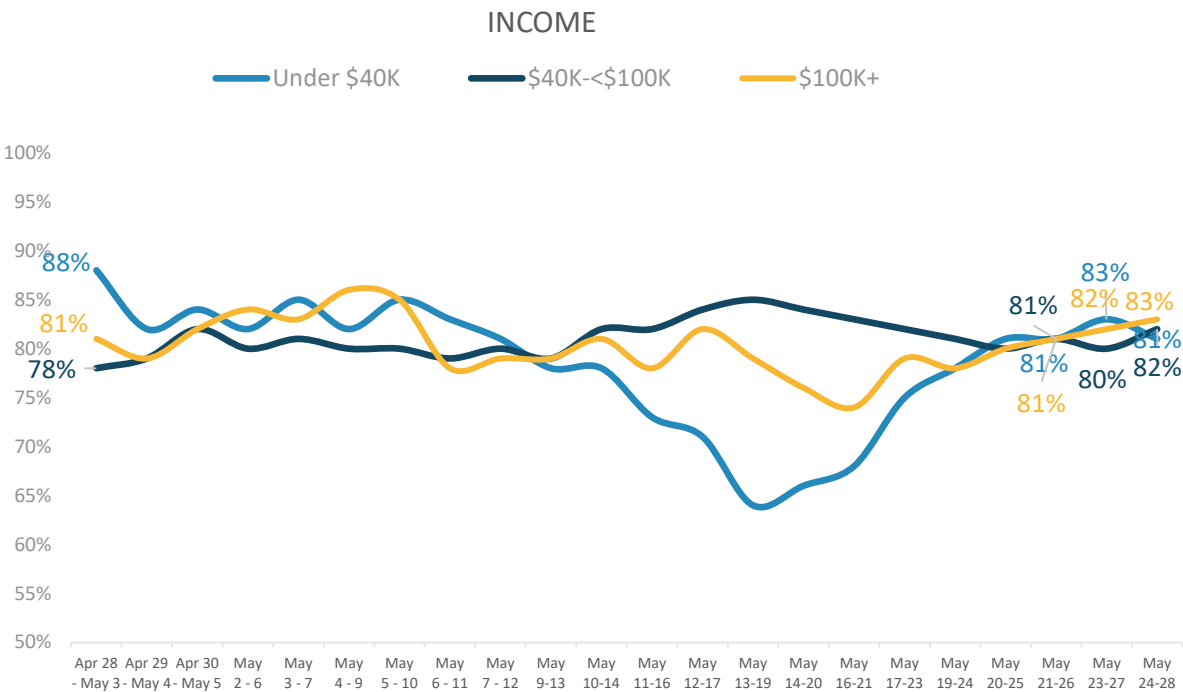
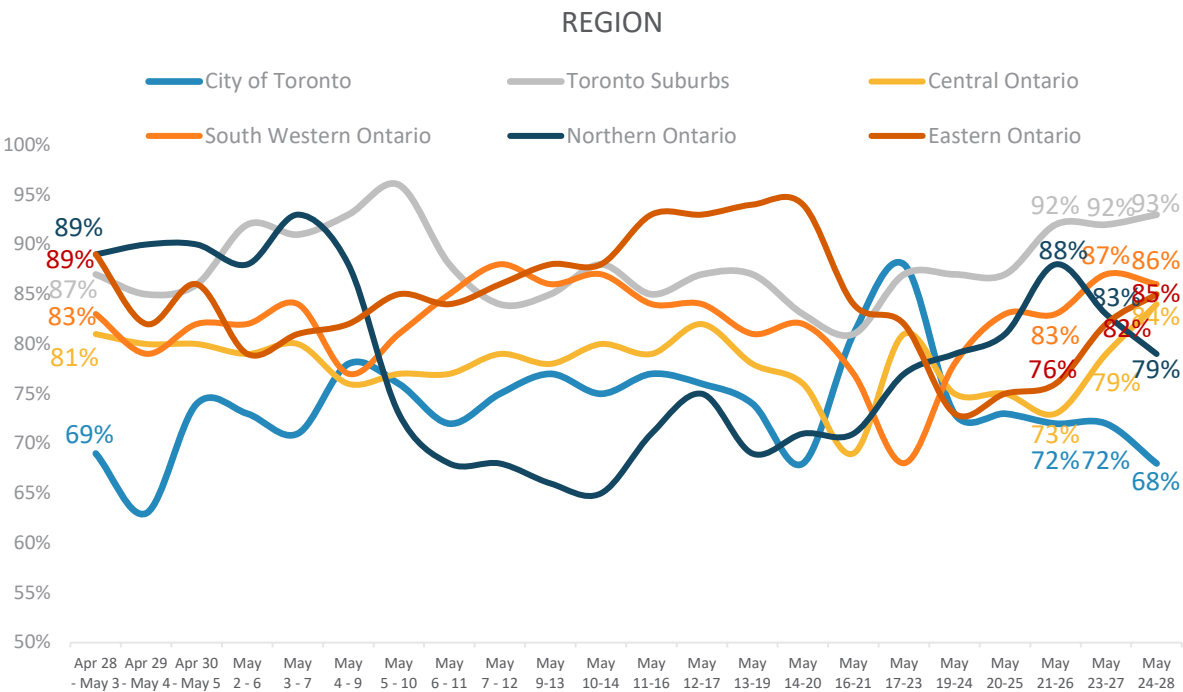


These graphs are based on 5 day roll in order to boost the sample sizes.

Q2. Overall, do you feel that the Ontario provincial government is on the right track or the wrong track, in terms of how it is governing the province? Base: Total sample

The government’s ‘right track’ scores have really improved in the Toronto suburbs, while dropping in the City of Toronto.

Right Track Scores – 5-Day Roll

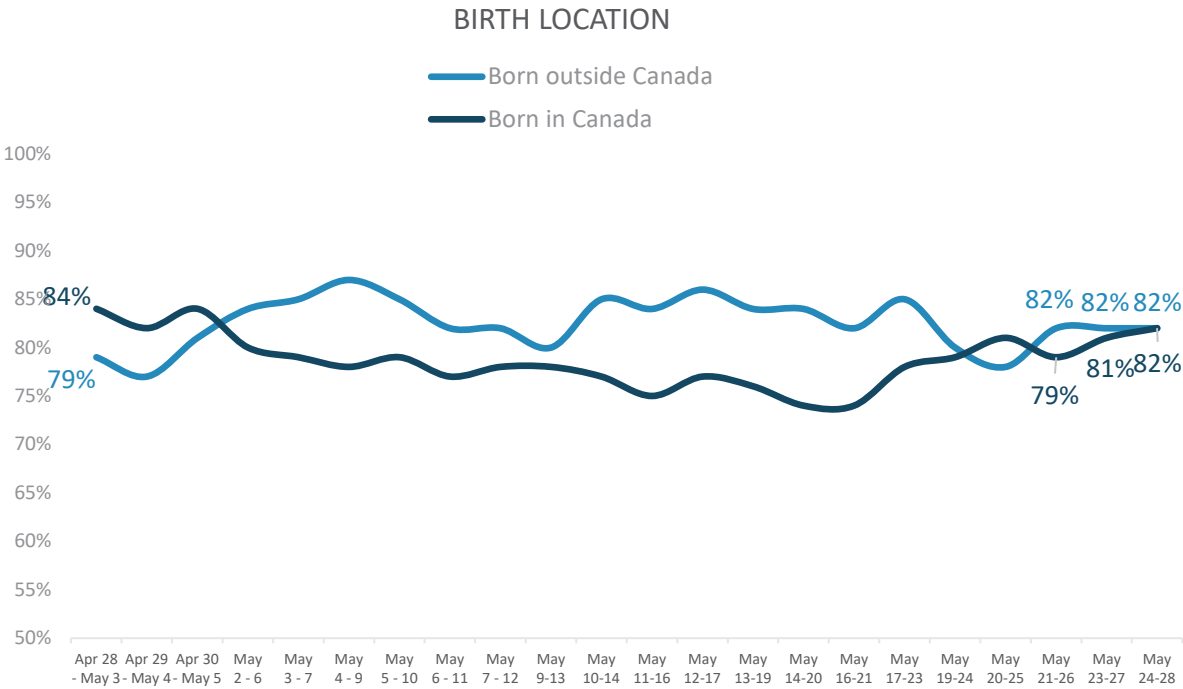
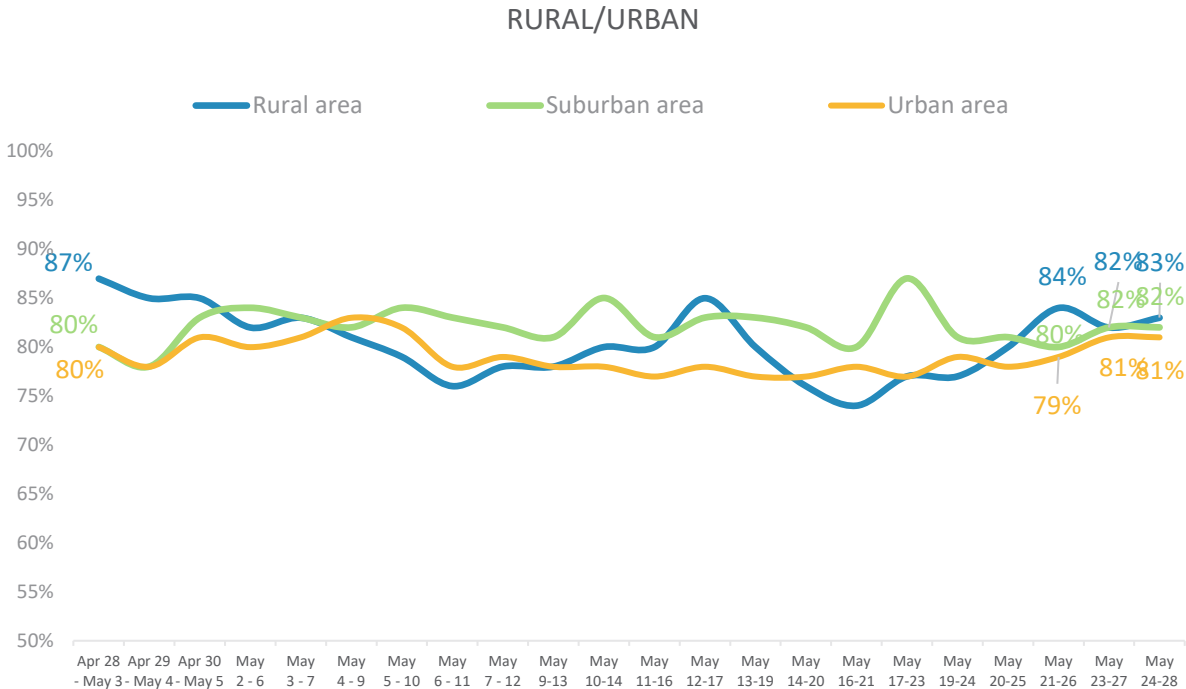


These graphs are based on 5 day roll in order to boost the sample sizes.

Q2. Overall, do you feel that the Ontario provincial government is on the right track or the wrong track, in terms of how it is governing the province? Base: Total sample

As the ‘right track’ rebounded to 84%, the gaps between those ‘born outside Canada’ and ‘born in Canada’ and between the different community types have disappeared.

Right Track Scores – 5-Day Roll



These graphs are based on 5 day roll in order to boost the sample sizes.

The provincial government receives positive scores across the board. This helps explains the ongoing strong ‘right track’ scores for the government.

NET SCORE: Good (7-9) – Poor (1-3)

	Mar '20	Apr '20	May '20	May 19-23	May 20-24	May 21-25	May 23-26	May 24-27	May 25-28
	%	%	%	%	%	%	%	%	%
HEALTH METRICS									
Delivering quality healthcare to Ontarians	-1	+32	+39	+39	+31	+30	+25	+27	+33
Reducing overcrowding in hospitals	-32	+3	+16	+9	+13	+15	+15	+18	+19
Keeping people safe during the COVID-19 situation	+29	+67	+72	+58	+55	+54	+55	+63	+68
ECONOMIC/GOVERNMENT SPENDING METRICS									
Building the provincial economy	-1	+30	+32	+34	+30	+29	+26	+32	+34
Creating and protecting jobs	-7	+27	+25	+23	+21	+25	+27	+31	+30
Improve Ontario’s finances	-6	+24	+21	+17	+16	+17	+19	+21	+21
Sufficient business support during the COVID-19 situation	-	-	+53	+48	+49	+52	+50	+56	+56
Managing the re-opening of the economy	-	-	+41	+44	+40	+36	+37	+40	+41

Q5. Using a scale where, where 1 means “poor” and nine is “excellent”, how would you rate the performance of Ontario government at managing each of the following? Bases vary

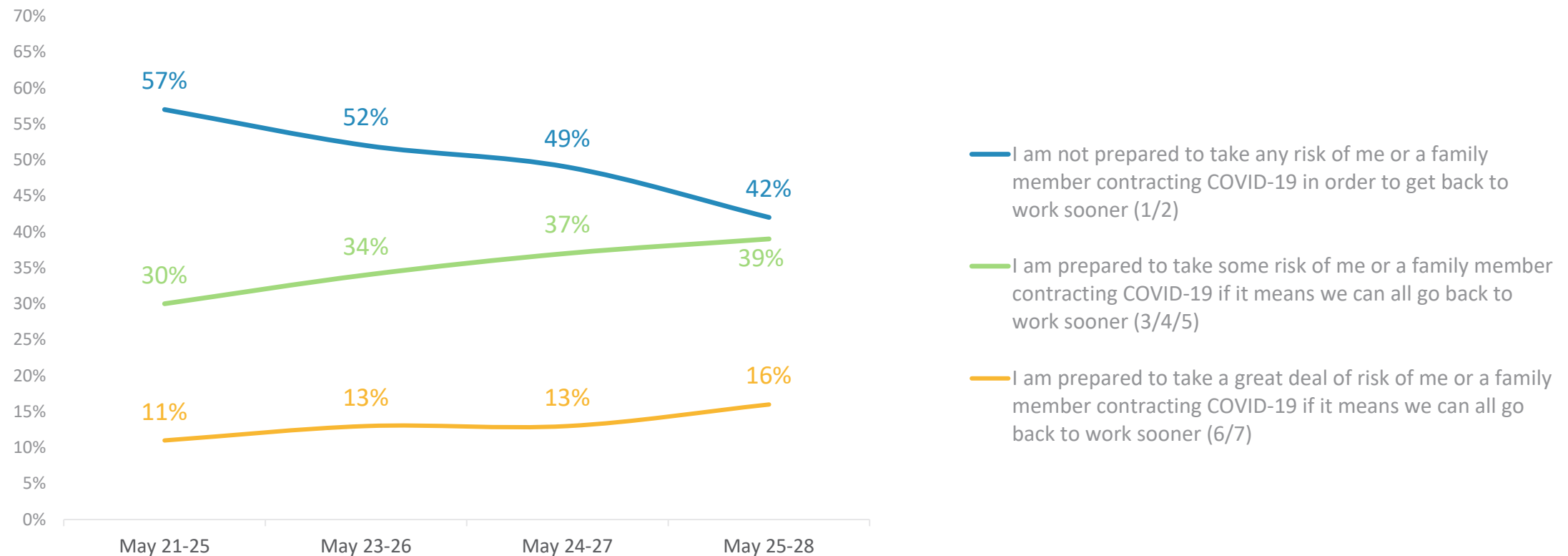
COVID-19



ONTARIANS' LEVEL OF RISK TOLERANCE FOR COVID-19 VERSUS GOING BACK TO WORK SOONER

Ontarians are increasingly more likely to say that they are prepared to take 'some risk' in order to go back to work sooner. Early this week, the risk tolerance was at 41%; it is now at 55%. At the same time, the proportion of Ontarians wanting to take 'no risk' dropped from 57% to 42%.

- In light of the government's announcement that it may opt for a regional approach to economic re-opening, there are some key regional differences: residents of Northern and Eastern Ontario are more interested in taking risks, while those living in the City of Toronto and Southwestern Ontario are more reluctant to bear any risk in contracting the disease.



QCV-73. Where would you place yourself on the following scale about the risk of contracting COVID – 19 and opening up the economy more quickly?

Base: Total sample (May 21-25 n=317, May 23-26 n=410, May 24-27 n=410, May 25-28 n=410)

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In a similar vein, most Ontarians now think that they have to learn to live with some cases of COVID-19. Still, an increasing majority feel that they can’t wait for a vaccine before trying to get things back to normal.

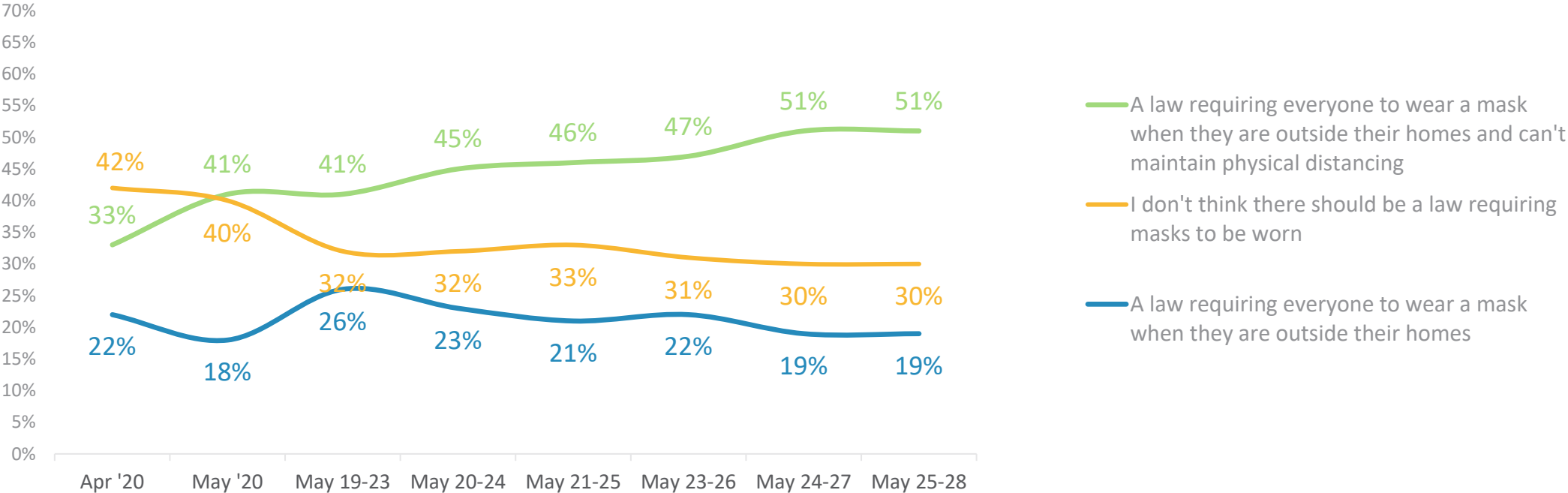
% STRONGLY/SOMEWHAT AGREE	May 21-25	May 23-26	May 24-27	May 25-28
n=	varies			
	%	%	%	%
I am willing to live with the fact that there will continue to be some cases of COVID - 19 for quite a while yet	85	84	85	86
We can’t wait for a vaccine to be developed before trying to get things back to normal	54	56	56	60

QCV-8B. Do you agree or disagree with each of the following statements about the effects of COVID-19. The first is ...

Base: Total sample

As the economy opens up and Ontarians’ risk tolerance increases, support for a law requiring people to wear a mask if they can’t maintain physical distance has been steadily increasing. Put this together with support for an across-the-board law, Ontarians are increasingly wanting some legal codification of mask wearing.

- The desire for some legal framework for mask wearing has increased from about 60% to 70%.
- Only 30% don’t think there should be a law requiring masks to be worn.



QCV-30. Which of these two approaches do you prefer:
Base: Total sample

Since the release of the Canadian Forces report, Ontarians' views that not enough has been done to protect residents of long-term care homes has increased from 46% to 53%.

- In the latest wave, people aged 35 to 54, City of Toronto residents, and those who think the government is on the 'wrong track' are the most likely to think that not enough has been done to protect residents of long-term care homes.

	Apr'20	May'20	May 19-23	May 20-24	May 21-25	May 23-26	May 24-27	May 25-28
n=	Varies							
	%	%	%	%	%	%	%	%
Protecting residents of long-term care homes and retirement homes								
Doing more than is necessary	4	4	7	5	5	5	6	5
Doing what is required	43	44	47	45	46	44	40	39
Not doing as much as they should	47	48	45	47	46	48	51	53
Don't know	6	4	2	3	3	3	3	3
Protecting front-line health care workers such as those working in hospitals, long term care homes and retirement homes								
Doing more than is necessary	3	5	7	6	6	7	6	7
Doing what is required	49	53	58	59	59	58	58	57
Not doing as much as they should	43	39	33	33	33	33	34	35
Don't know	5	4	3	2	2	2	2	1

QCV-20. Thinking about the actions that the Government of Ontario has taken since the onset of COVID-19, at this time would you say they are doing more than is necessary, doing what is required or not doing as much as they should with respect to:

Base: Total sample

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While there continues to high awareness of the guidelines for the re-opening of Ontario businesses, there has been some softening in awareness.

	May 6-10	May 7-11	May 9-12	May 10-13	May 11-14	May 12-16	May 13-17	May 14-19	May 16-20	May 17-21	May 19-23	May 20-24	May 21-25	May 23-26	May 24-27	May 25-28
n=	Varies															
	%	%	%	%	%	%	%	%	%	%	%	%	%	%	%	%
Yes	46	49	52	55	62	63	64	65	67	76	72	74	75	73	73	70
No	54	50	48	45	38	36	35	34	31	23	27	25	25	27	26	30
Don't know	<1	<1	<1	-	-	1	1	1	2	1	<1	<1	<1	<1	1	1

There continues to be strong support for provincial guidelines to be legally enforced despite a slight decline in support in the past few waves.

	May 6-10	May 7-11	May 9-12	May 10-13	May 11-14	May 12-16	May 13-17	May 14-19	May 16-20	May 17-21	May 19-23	May 20-24	May 21-25	May 23-26	May 24-27	May 25-28
n=	184	242	300	258	209	208	206	208	214	215	276	321	367	410	410	410
	%	%	%	%	%	%	%	%	%	%	%	%	%	%	%	%
Voluntary	35	36	35	33	31	27	26	27	26	22	26	27	28	29	27	27
Legally enforced	63	61	63	65	67	71	73	72	74	77	73	73	71	70	72	72
Don't know	3	2	2	2	2	2	2	1	1	1	1	1	1	1	1	1

QCV-54. The guidelines for re-opening include requirements for physical distancing, frequent handwashing and sanitizing of surfaces, staggered shifts, installing physical barriers, and contactless payment options Do you believe that these guidelines should remain voluntary or should they be legally enforced? (previous phrasing) Do you believe that these guidelines should remain voluntary or should they be legally enforced?

Base: Total sample

Findings indicate Ontario parents are much more likely to think they will be willing to send their children back to school in September compared to June.

	May 11-17	May 23-25	May 23-26	May 24-27	May 25-28
n=	159	75	88	97	100
	%	%	%	%	%
TOTAL LIKELY	36	88	68	65	71
Very likely	18	44	25	24	28
Somewhat likely	18	44	43	41	44
Not very likely	22	6	18	17	16
Not likely at all	40	6	14	17	12
TOTAL NOT LIKELY	61	12	32	35	28
Don't know/not sure	3	1	1	1	1

POTENTIAL MEASURES TO INCREASE LIKELIHOOD TO RETURN CHILDREN TO SCHOOL

Among Ontario parents, about 1-in-2 think that requiring children to wash their hands regularly and offering hand sanitizers would increase their comfort in sending their children to school. Over 3-in-10 say ensuring classrooms and hallways are thoroughly cleaned and disinfected daily.

- About one-in-five say that none of these measures would increase the likelihood of them sending their children to school.

	May 11-17	May 17-21	May 19-23	May 20-24	May 21-25	May 23-26	May 24-27	May 25-28
n=	159	104	98	91	89	88	97	100
	%	%	%	%	%	%	%	%
Staff and students are required to wear face masks at all times.	17	11	16	15	16	14	15	19
Physical distancing measures are enforced on school property.	18	11	13	12	15	17	19	21
The number of children in each class is limited and -students are seated 6 feet apart.	21	39	40	37	36	31	31	32
All children are required to wash hands regularly and hand sanitizers are available at the doors.	38	54	54	52	47	50	46	55
Classes and hallways are thoroughly cleaned and disinfected daily.	25	32	29	27	31	30	36	36
None of these measures would increase the likelihood my child/children would/will return	37	25	22	25	25	26	24	18

QCV-61. Which two of the following safety measures would increase the likelihood of having your child/children return to school?
Base: Parents with children in public schools

Most parents overwhelmingly believe it is ‘very’ difficult for schools to enforce physical distancing.

	May 11-17	May 17-21	May 19-23	May 20-24	May 21-25	May 23-26	May 24-27	May 25-28
n=	159	104	98	91	89	88	97	100
%	%	%	%	%	%	%	%	%
TOTAL VERY/SOMEWHAT EASY	8	4	8	10	8	6	5	3
Very easy	2	1	3	4	2	2	2	1
Somewhat easy	6	3	5	7	6	4	4	2
Somewhat difficult	18	22	18	16	18	19	20	19
Very difficult	75	74	74	73	74	74	75	78
TOTAL VERY/SOMEWHAT DIFFICULT	92	96	92	90	92	94	95	97
Don't know/not sure	-	-	-	-	-	-	-	-

Recent waves suggest that over 7-in-10 favour scheduling classes on alternating days so that fewer students are in school each day.

“Scheduling classes on alternating days so that fewer students are in school each day.”

	May 11-17	May 17-21	May 19-23	May 20-24	May 21-25	May 23-26	May 24-27	May 25-28
n=	159	104	98	91	89	88	97	100
	%	%	%	%	%	%	%	%
TOTAL FAVOUR	62	65	72	76	78	79	80	73
Strongly favour	30	27	32	37	44	44	42	37
Somewhat favour	32	38	40	39	34	35	38	36
Neither favour nor oppose	14	15	13	10	9	7	5	5
Somewhat oppose	9	9	7	6	3	5	5	7
Strongly oppose	15	9	7	6	9	8	8	15
TOTAL OPPOSE	24	18	14	12	12	13	13	22
Don't know	1	1	1	1	1	1	1	-

QCV-63A. To what extent do you favour or oppose each of the following as a way of ensuring physical distancing in schools?
Base: Parents with children in public schools

Not surprisingly, parents believe overwhelmingly that children have access to reliable internet and have a laptop, tablet or desktop computer. Just about 1-in-10 say they do not have these prerequisites for online instruction.

	May 11-17	May 17-21	May 19-23	May 20-24	May 21-25	May 23-26	May 24-27	May 25-28
n=	159	104	98	91	89	88	97	100
	%	%	%	%	%	%	%	%
Reliable internet								
Yes	93	87	91	90	90	90	88	91
No	7	11	7	8	9	9	11	8
Don't know	-	2	2	2	1	1	1	1
A laptop, tablet or desktop computer								
Yes	92	89	91	96	93	93	89	86
No	7	4	4	3	6	6	10	13
Don't know	1	7	5	1	1	1	1	1

SHIFTING PART OF THE CURRICULUM TO NEXT SCHOOL YEAR

In recent waves, Ontario's parents have moved toward being against the idea of shifting missed parts of the current school year to next year's academic calendar.

	May 11-17	May 17-21	May 19-23	May 20-24	May 21-25	May 23-26	May 24-27	May 25-28
n=	159	104	98	91	89	88	97	100
	%	%	%	%	%	%	%	%
TOTAL STRONGLY/SOMEWHAT AGREE	42	33	42	49	44	41	38	28
Strongly agree	17	15	17	22	21	20	19	13
Somewhat agree	26	19	25	27	24	21	19	15
Neither agree nor disagree	13	5	7	6	8	8	13	10
Somewhat disagree	19	18	17	17	17	16	16	27
Strongly disagree	25	44	35	28	30	34	33	34
TOTAL STRONGLY/SOMEWHAT DISAGREE	44	62	52	45	47	50	48	61
Don't know/not sure	1	-	-	-	-	-	-	-

QCV-66. Because students missed part of their current school year as a result of COVID-19, additional time should be added to next year's academic calendar.

Base: Parents with children in public schools

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Over 9-in-10 of Ontarians think that anyone in Ontario should be able to receive a test for COVID-19.

% STRONGLY/SOMEWHAT AGREE	May 19-23	May 20-24	May 21-25	May 23-26	May 24-27	May 25-28
n=	varies					
	%	%	%	%	%	%
Anyone who wants to get tested for COVID should be able to get tested	91	91	92	92	93	92

QCV-14. To what extent do you agree or disagree with the following statements about
Base: Total sample

While Ontarians overwhelmingly see a jobs and recovery plan as essential, they don’t want the government to focus more on getting the economy moving and less on stopping the spread of COVID-19. About 3-in-10 worry that there may not be a job for them if it takes too long to re-open the economy.

% STRONGLY/SOMEWHAT AGREE	May 21-25	May 23-26	May 24-27	May 25-28
n=	varies			
	%	%	%	%
It is essential that Ontario have a jobs and recovery plan in response to COVID-19	97	97	96	94
I worry that I won’t have a job to go back to if it takes too long to re-open the economy	35	31	31	28
It is time for the government to put more focus on getting the economy moving and less on stopping the spread of COVID-19	30	30	31	35

QCV-8B. Do you agree or disagree with each of the following statements about the effects of COVID-19. The first is ...

Base: Total sample

About 8-in-10 worry that the longer it takes to open the economy, the damage may be more severe.

% STRONGLY/SOMEWHAT AGREE	May 21-25	May 23-26	May 24-27	May 25-28
n=	varies			
	%	%	%	%
I worry that the longer it takes to open up the economy the more severely will be the damage to the economy	78	78	78	77

QCV-8B. Do you agree or disagree with each of the following statements about the effects of COVID-19. The first is ...

Base: Total sample

Almost two-thirds of Ontarians say that the primary focus of Ontario’s jobs and recovery plan should be infrastructure spending. Only 32% preferred tax cuts.

- Those living in urban areas and those with incomes <\$40k are the most likely to believe increased infrastructure spending should be the primary focus of this plan.
- In addition, those who see the government on the ‘right track’ and those with incomes >\$100k also favour infrastructure investments as the primary focus, but they also modestly more inclined to prefer across-the-board tax cuts compared to other groups.

	May 21-25	May 23-26	May 24-27	May 25-28
n=	317	410	410	410
	%	%	%	%
Across the board tax cuts designed to give Ontarians more spending power	31	31	32	32
Increased infrastructure spending designed to create more jobs	65	64	64	63
Don’t know	4	5	5	5

QCV-72. Which one of the following approaches should be the primary focus of Ontario’s plan to get the economy moving again?

Base: Total sample

Ontarians identified two areas – infrastructure investment and job training/skills development – that should be the focus of Ontario’s jobs and recovery plan.

	May 21-25	May 23-26	May 24-27	May 25-28	
n=	317	410	410	410	Three Tiers of Initiatives
	%	%	%	%	
Infrastructure investment	48	46	41	40	Top Tier
Jobs training and skills development	44	42	42	43	
Innovation and technology investment	32	30	30	29	Middle Tier
Reduce personal taxes	29	32	35	36	
Attracting and retaining businesses	25	24	27	28	
Cut red tape and burdensome regulation	14	14	14	14	Lower Tier
Other	6	7	5	5	
Don't know/ Refuse	1	2	2	3	

QCV-74. Which two of the following are the most important to focus on as part of Ontario’s jobs and recovery plan?

Base: Total sample

About 7-in-10 say small businesses with under 50 employees have been the most hurt by the response to COVID-19.

	May 21-25	May 23-26	May 24-27	May 25-28
n=	317	410	410	410
	%	%	%	%
Newly established start-up businesses	19	18	21	23
Small businesses with under 50 employees	70	70	67	67
Medium size businesses of between 50 and 499 employees	5	5	5	5
Large businesses of 500 or more employees	4	4	4	3
Don't know	2	3	3	3

QCV-75. Which one of the following do you feel has been most hurt by the closing down of much of the economy in response to COVID - 19

Base: Total sample

Small businesses with under 50 employees are the companies who Ontarians think require the most help from a jobs and recovery plan.

	May 21-25	May 23-26	May 24-27	May 25-28
n=	317	410	410	410
	%	%	%	%
Newly established start-up businesses	16	13	14	12
Small businesses with under 50 employees	68	68	68	67
Medium size businesses of between 50 and 499 employees	11	12	12	15
Large businesses of 500 or more employees	3	4	4	4
Don't know	2	3	2	2

QCV-76. Which one of the following do you feel should be given the most help in Ontario’s jobs and recovery plan?

Base: Total sample

Ontarians identify ‘agriculture/agri-food’ and ‘hospitality’ as the two most important sectors for receiving help from a jobs and recovery plan. The next tier is ‘manufacturing’, ‘retail’, and ‘technology/innovation’.

	May 21-25	May 23-26	May 24-27	May 25-28	Top Sectors needed Assistance
n=	317	410	410	410	
	%	%	%	%	
Agriculture/Agri-food	40	39	38	38	High Tier
Hospitality (i.e. hotels, restaurants, bars, theatres)	38	39	39	39	
Manufacturing	28	28	29	26	Medium Tier
Retail	27	27	27	26	
Technology/Innovation	25	25	25	27	
Construction	16	16	13	15	Lower Tier
Financial Services	9	9	11	11	
Energy	7	6	6	7	
Mining/Natural Resources	6	5	5	5	
Don't know/ Refuse	2	3	3	3	

QCV-77. Which two of the following are the most important sectors for Ontario’s jobs and recovery plan to focus on?

Base: Total sample

Almost 1-in-2 say that they know someone who is a business owner who has been affected by the response to COVID-19.

	May 21-25	May 23-26	May 24-27	May 25-28
n=	317	410	410	410
	%	%	%	%
Yes	49	48	46	46
No	51	52	54	54

QCV-79. Do you personally know anyone who has had the business they own or operate suffer or go out of business as a result of the response to COVID -19?
Base: Total sample

SPENDING BEHAVIOUR DURING COVID-19 AND WHEN THE ECONOMY REOPENS

There are indications that consumer confidence is low during the COVID-19 shutdown. Confidence will likely be higher as the province moves to open up the economy, but Ontarians will be reluctant to spend.

SPENDING BEHAVIOUR DURING COVID-19

	May 20-24	May 21-25	May 23-26	May 24-27	May 25-28
n=	227	317	410	410	410
	%	%	%	%	%
Spending more than you would normally	16	16	14	13	12
Spending about as much as you would normally	28	26	27	24	21
Spending less than you would normally	56	58	60	63	67

EXPECTED SPENDING BEHAVIOUR AS THE ECONOMY OPENS UP

	May 20-24	May 21-25	May 23-26	May 24-27	May 25-28
n=	227	317	410	410	410
	%	%	%	%	%
Spending more than you would normally	17	18	18	20	19
Spending about as much as you would normally	46	48	49	48	47
Spending less than you would normally	37	34	33	32	33
Don't know	-	-	-	<1	<1

QCV-80. Since the time of the closing of parts of the economy in response to COVID – 19, have you been

QCV-81. And as the economy starts to reopen again do you anticipate that, for this time of year, you will be ...

Base: Total sample

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