

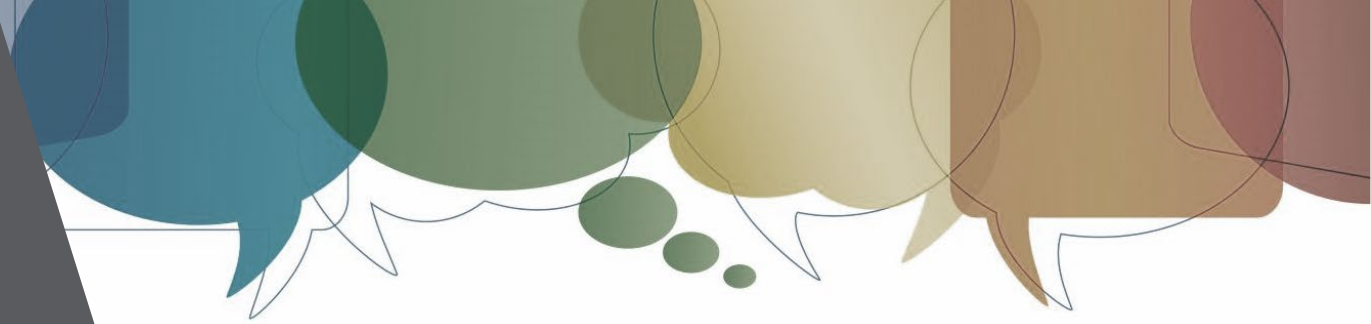


THE
**STRATEGIC
COUNSEL** 25

TORONTO | OTTAWA | CALGARY

www.thestrategiccounsel.com

EXPERIENCE • PASSION • CREATIVITY
CUSTOM SOLUTIONS FOR COMPLEX ISSUES



JUNE 2020 RESEARCH

PULSE REPORT ON COVID-19 – REPORT #30

CABINET OFFICE

June 11th 2020



KEY FINDINGS

Key Findings

1 Since the regional Phase 2 re-opening announcement, there has been no change in the government's 'right track' scores which remain at 78%.

Over the past three days, 'right track' scores have improved among those with income >\$100k and born outside Canada.

However, these scores have softened among those born in Canada in the latest results.

4 Following the regional re-opening news, there has been an 8-point increase in Ontarians' willingness to take 'some risk' in order to go back to work sooner.

Now, overall 68% say they are willing to take some risk. Two weeks ago, this was at 41%.

Mirroring this change, there has been a decline (from 57% to 31%) in the group who wishes to take no risk.

2 Over the past three days since the regional re-opening news, the government performance on economic/spending metrics have improved.

Since the regional re-opening news on Monday, fewer Ontarians are worried that the longer it takes to open up the economy, the more severely will be the damage to the economy.

5 This willingness to take some 'risk' is likely connected to the perception that COVID-19 is becoming under control.

The latest wave shows that Ontarians have reached their highest level (48%) in thinking that the COVID-19 virus is under control.

3 The latest waves indicate that perceptions toward the government's performance on 'managing long-term care' has improved by 7-points.

Other health measures remain stable.

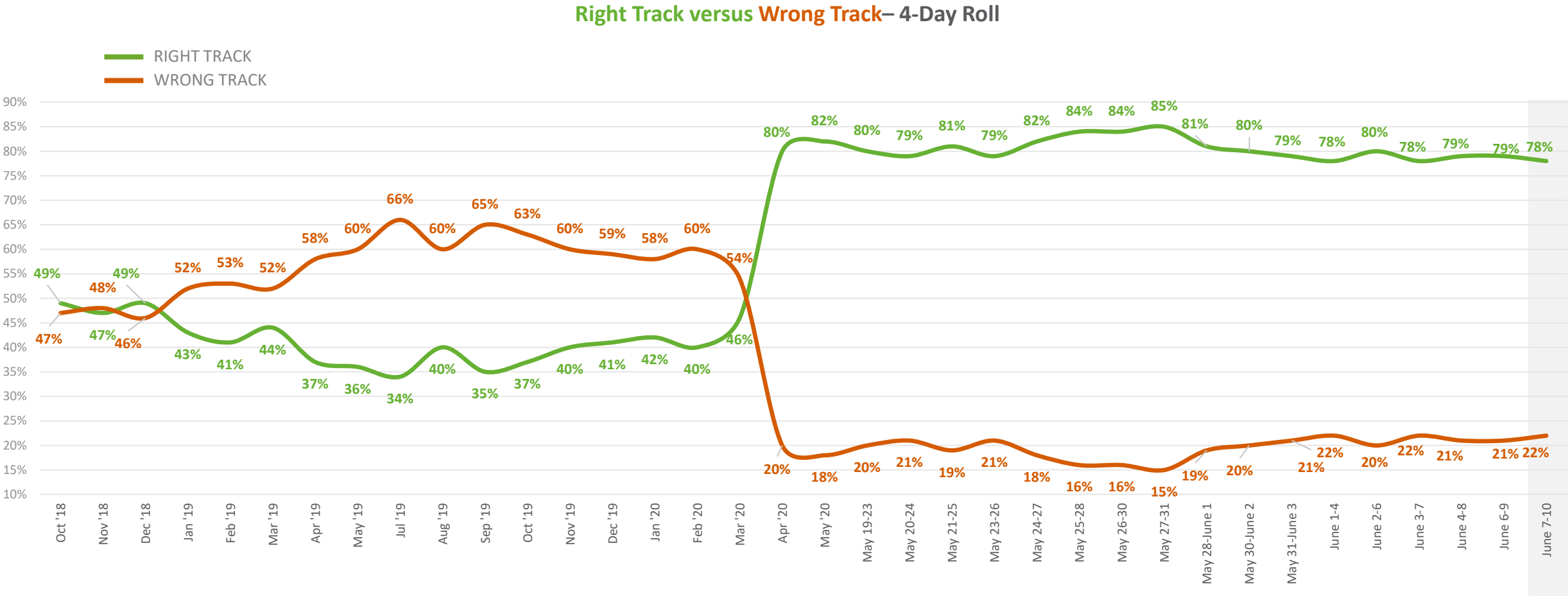
6 There continues to be considerable concern about the management of long-term care.

The perception that the province is 'not doing as much as they should' has stabilized at 57%.

RIGHT TRACK
WRONG TRACK



Since the announcement of the Phase 2 regional re-openings, the government’s ‘right track’ remains unchanged at 78%.

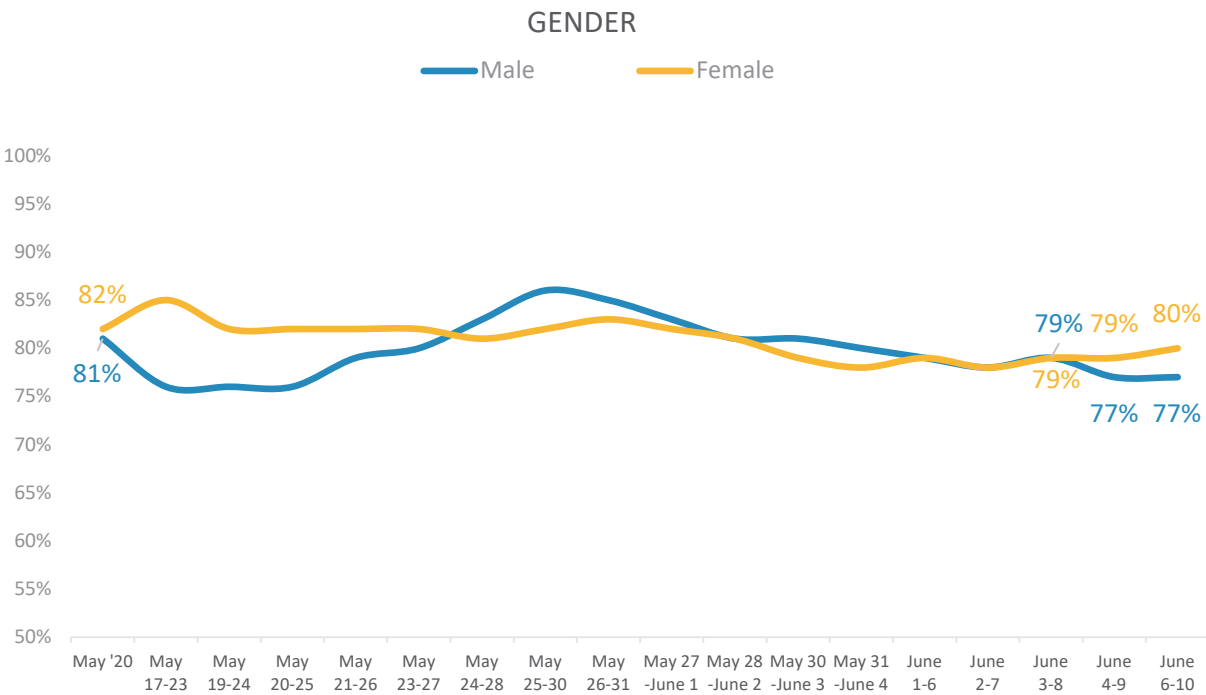
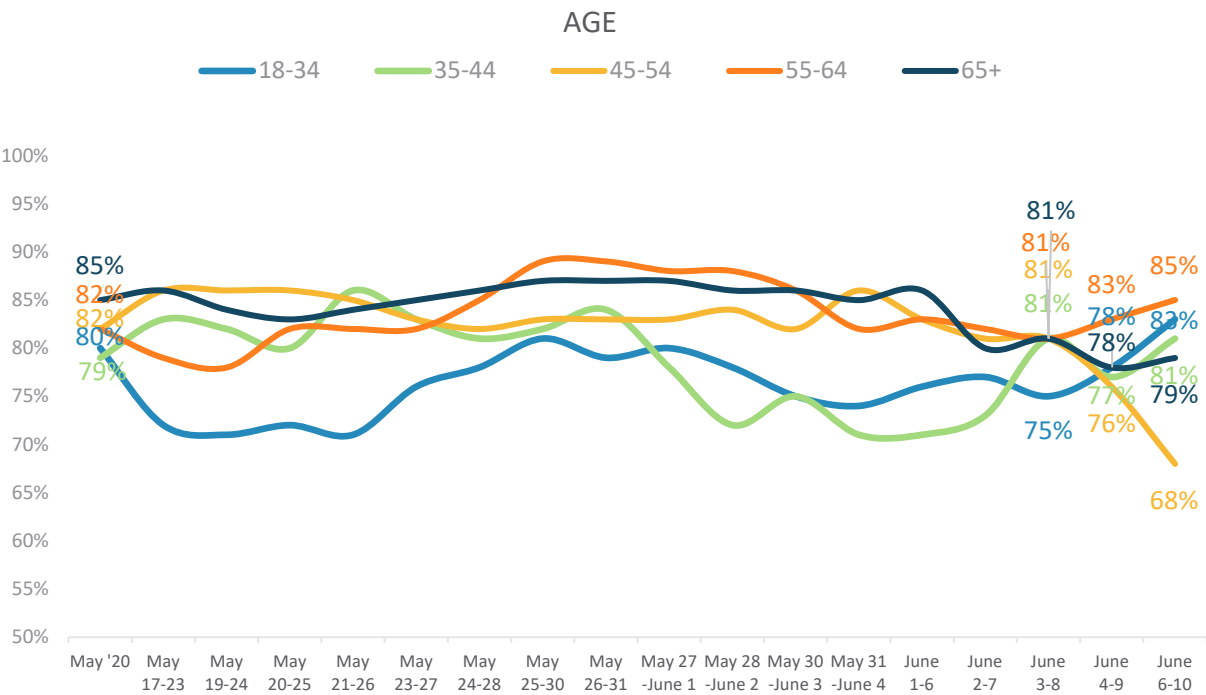


These graphs are based on 4 day roll in order to boost the sample sizes.

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

Women’s ‘right track’ scores have remained stable. Softer ‘right track’ scores are particularly evident among those aged 45-54 in the days following Phase 2 regional re-openings news, while these scores have improved among those aged 18-34.

Right Track Scores – 5-Day Roll

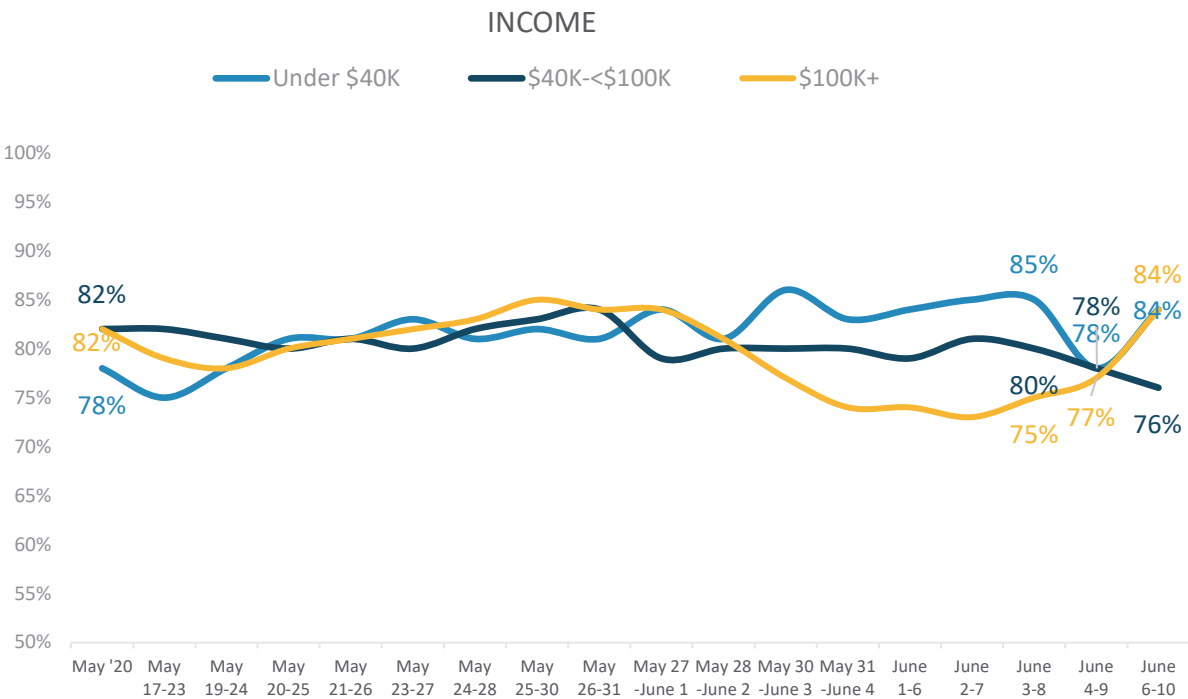
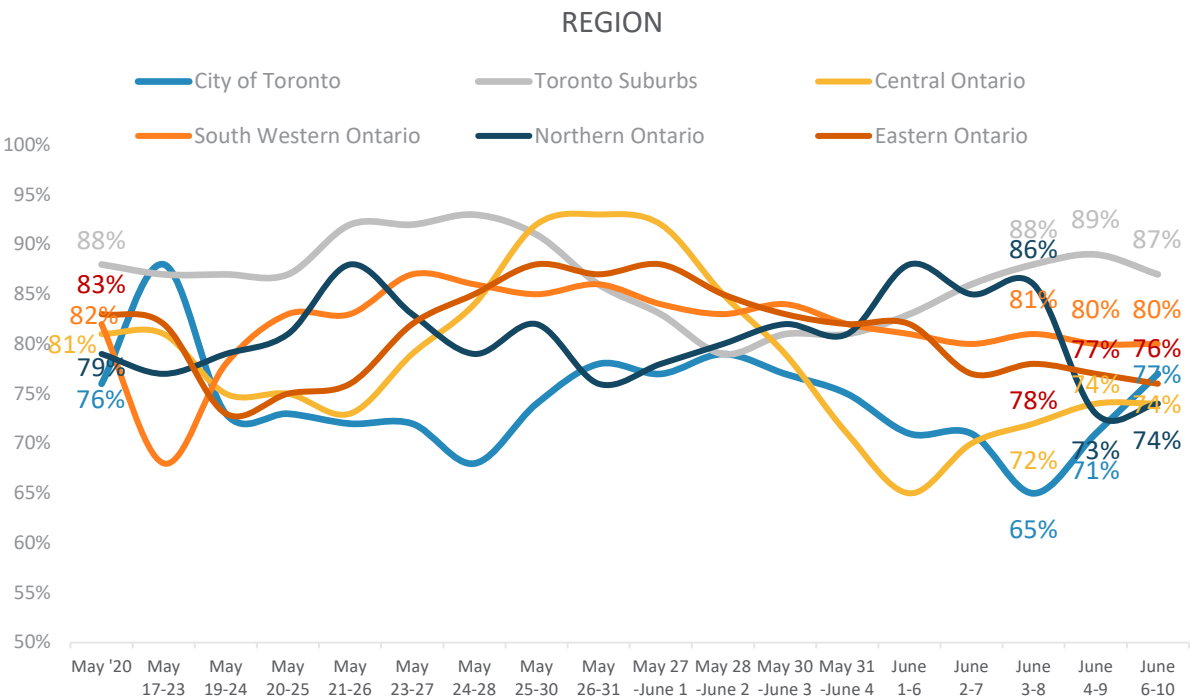


These graphs are based on 5 day roll in order to boost the sample sizes.

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

Since the Phase 2 regional re-opening statement, ‘right track’ scores have improved among those with income >\$100k, while these scores have slipped slightly among those earning \$40k-100k.

Right Track Scores – 5-Day Roll

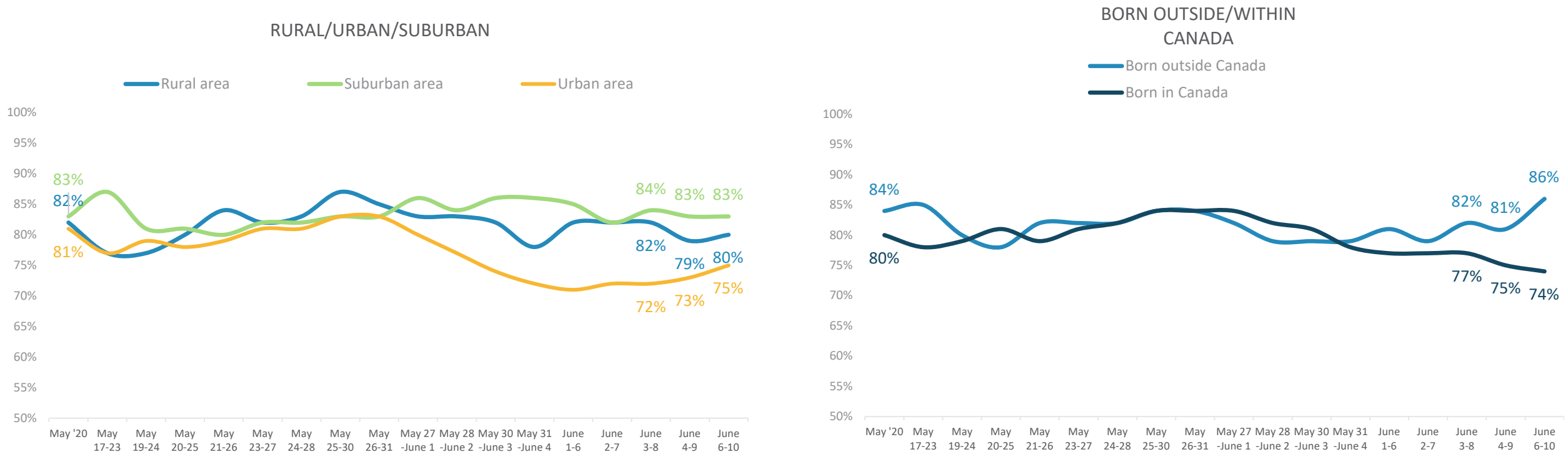


These graphs are based on 5 day roll in order to boost the sample sizes.

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

Just after the Phase 2 regional re-openings, the ‘right track’ scores have softened among those born in Canada, while increasing among those born outside Canada. These scores remain softer in urban areas compared to suburban and rural areas.

Right Track Scores – 5-Day Roll



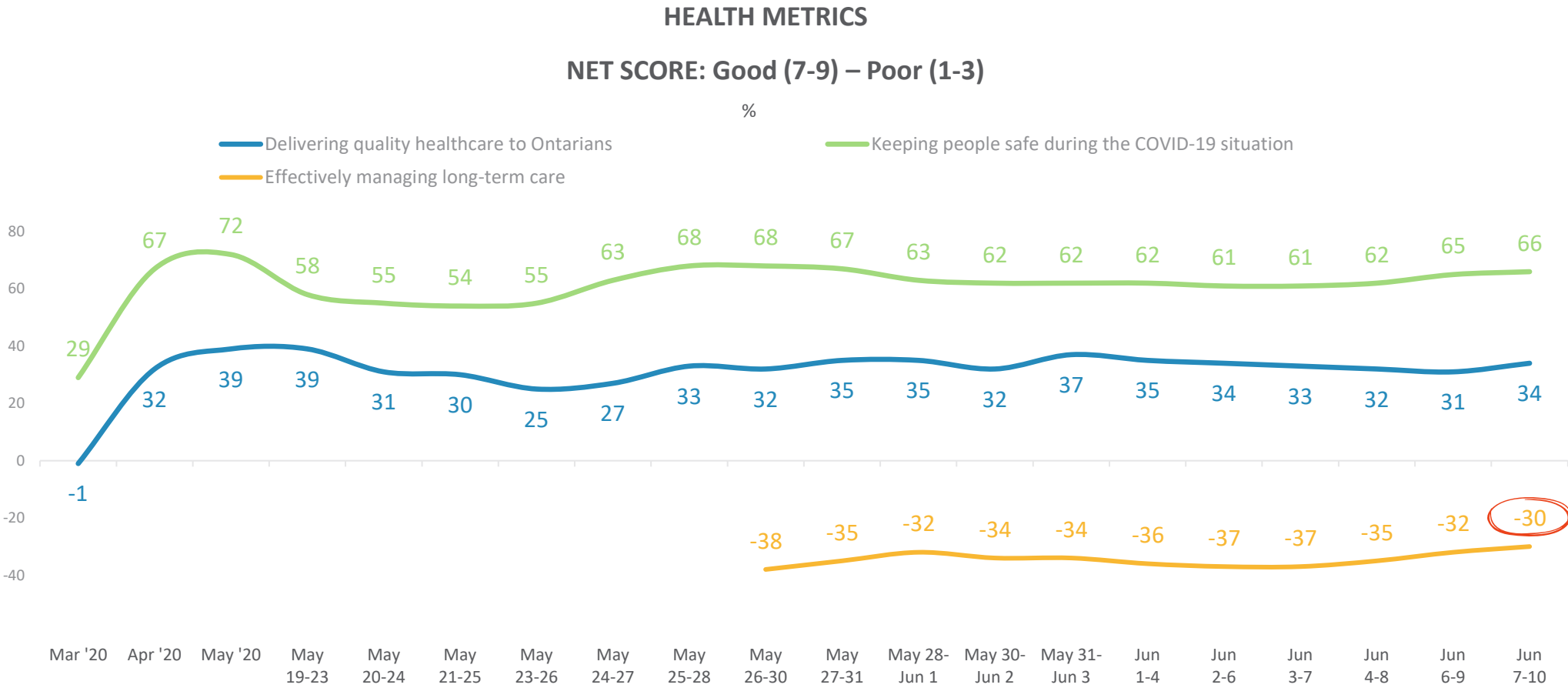
These graphs are based on 5 day roll in order to boost the sample sizes.

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

PERCEPTIONS OF GOVERNMENT PERFORMANCE DURING COVID-19 PANDEMIC

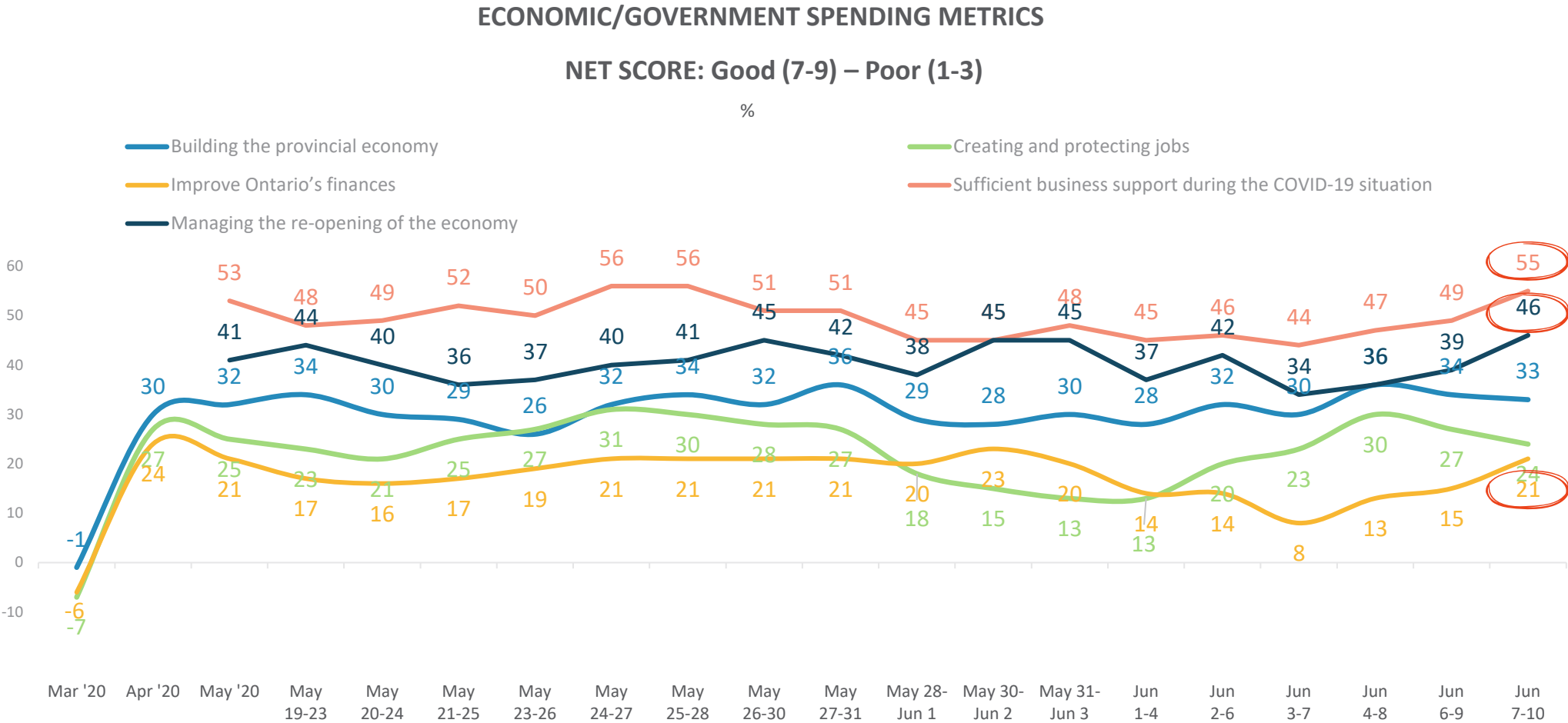


Over the past several waves, perception toward the government’s performance on ‘managing long-term care’ has improved by 7-points. Other health measures remain stable.



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

Over the past three days since the regional re-opening news, the government performance on economic/spending metrics have improved.



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

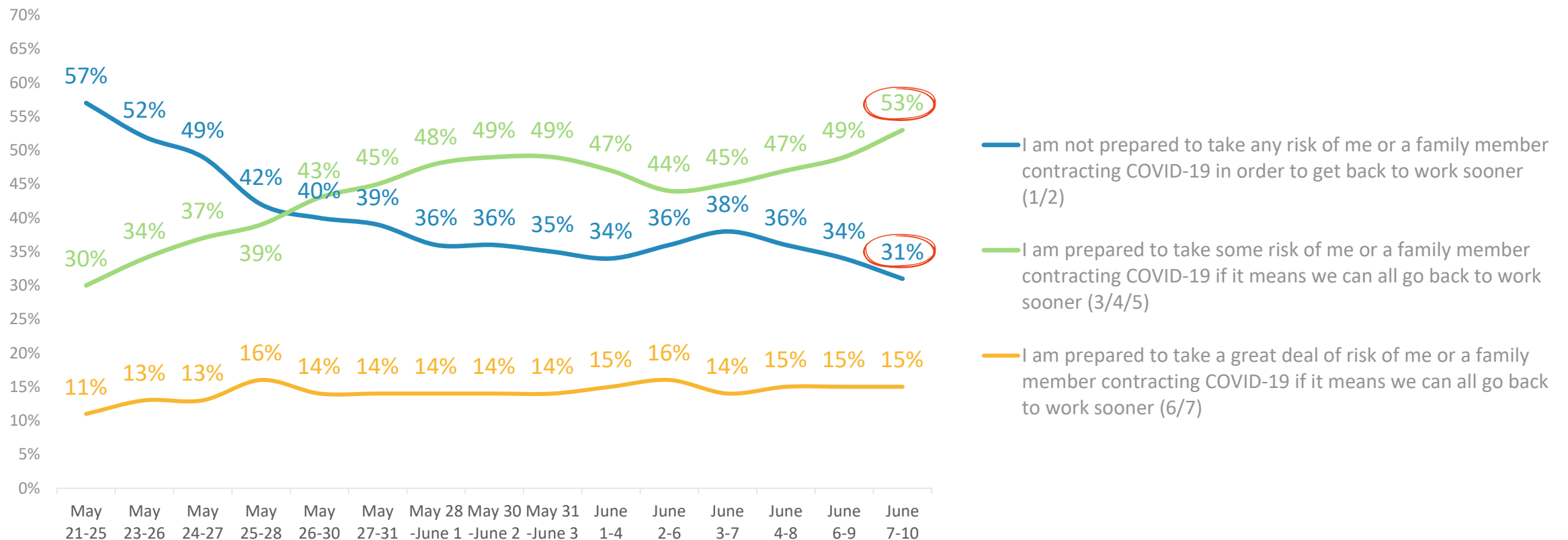
COVID-19 RISK TOLERANCE



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

Over the past three days, there has been an 8-point increase in Ontarians' willingness to take 'some risk' in order to go back to work sooner. Now, almost 7-in-10 say they are willing take some risk. Mirroring this change, there has been a decline (from 38% to 31%) in the group who wishes to take no risk.

- Women, those living in urban areas, and those who see the government on the 'wrong track' on the most likely not to want any risk in order to go back to work sooner.
- Those willing to take some risk are: men, those with incomes >\$100k, and those who see the government on the 'right track'.



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, May 26-30 n=410, May 27-31 n=410, May 28-June 1 n=410, May 30-June 2 n=410, May 31-June 3 n=410, June 1-4 n=410, June 2-6 n=410, June 3-7 n=410, June 4-8 n=410, June 6-9 n=410, June 7-10 n=410)

Over the past two weeks, there has been 10-point increase in the view Ontarians need to learn how to live with some cases of COVID-19. And, a large majority (61%) feel that they can’t wait for a vaccine before trying to get things back to normal.

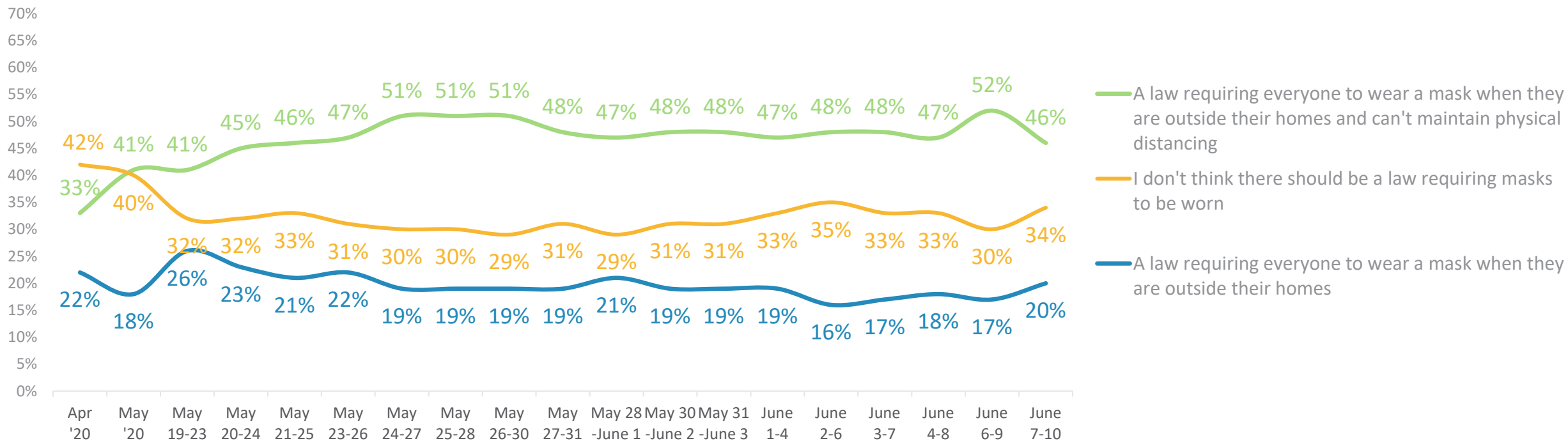
% STRONGLY/SOMEWHAT AGREE	May 21-25	May 23-26	May 24-27	May 25-28	May 26-30	May 27-31	May 28- June 1	May 30- June 2	May 31- June 3	June 1-4	June 2-6	June 3-7	June 4-8	June 6-9	June 7-10
n=	varies														
	%	%	%	%	%	%	%	%	%	%	%	%	%	%	%
I am willing to live with the fact that there will continue to be some cases of COVID - 19 for quite a while yet	85	84	85	86	88	91	90	88	86	83	85	88	89	93	94
We can’t wait for a vaccine to be developed before trying to get things back to normal	54	56	56	60	63	63	65	67	65	65	62	60	63	62	61

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

MAKING THE WEARING OF A MASK A LEGAL REQUIREMENT

Support for a law requiring people to wear a mask if they can't maintain physical distancing remains high at 46%. Put this together with support for an across-the-board law, a large majority (66%) of Ontarians continue to wish for some legal codification of mask wearing.

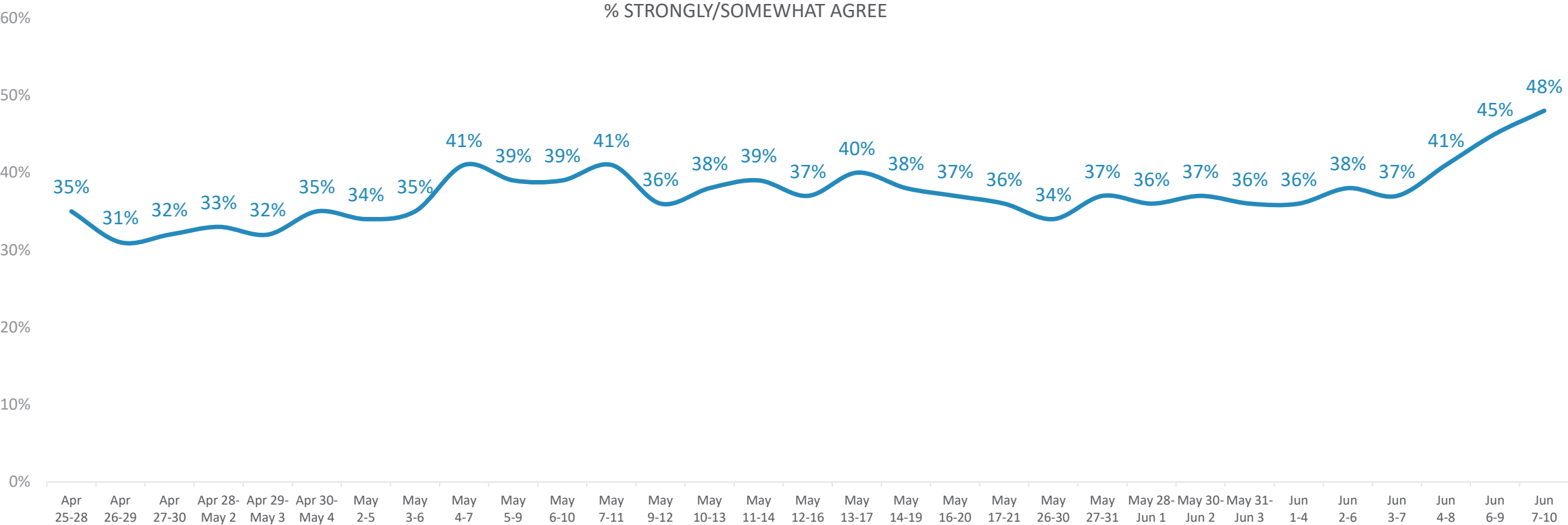


QCV-30. Which of these two approaches do you prefer:
Base: Total sample

PERCEPTIONS ABOUT WHETHER COVID-19 IS UNDER CONTROL

Since the regional re-opening announcement on Monday, there has been a 11-point rise in the perception that COVID-19 is under control in Ontario: now just under 5-in-10 of Ontarians think that COVID-19 is getting under control in Ontario.

I feel that COVID-19 is under control now in Ontario.



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, bases vary

PERCEPTIONS
TOWARD
LONG-TERM CARE



The perception that the province is ‘not doing as much as they should’ has stabilized at 57%.

- In the latest wave, women, people aged 45+ (particularly those 65+), born in Canada, urban 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	May 26-30	May 27-31	May 28-June 1	May 30-June 2	May 31-June 3	June 1-4	June 2-6	June 3-7	June 4-8	June 6-9	June 7-10
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	5	6	4	4	3	3	3	3	5	7	7
Doing what is required	43	44	47	45	46	44	40	39	36	33	33	34	34	35	36	35	33	31	33
Not doing as much as they should	47	48	45	47	46	48	51	53	56	58	58	59	59	58	57	57	57	57	57
Don't know	6	4	2	3	3	3	3	3	3	4	4	4	4	4	4	5	5	5	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	7	5	5	3	5	5	5	5	7	7	10
Doing what is required	49	53	58	59	59	58	58	57	55	55	51	54	55	52	53	50	48	53	52
Not doing as much as they should	43	39	33	33	33	33	34	35	36	38	41	40	38	40	38	40	41	36	35
Don't know	5	4	3	2	2	2	2	1	2	3	3	3	2	3	4	5	4	4	3

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

However, awareness of long-term care issues has remained at 74% after declining from 83% just after the release of the Canadian Forces report.

	May 27-31	May 28 -June 1	May 30 -June 2	May 31 -June 3	June 1-4	June 2-6	June 3-7	June 4-8	June 6-9	June 7-10
n=	189	291	410	410	410	410	410	410	410	410
	%	%	%	%	%	%	%	%	%	%
Yes	83	81	78	76	76	75	75	74	76	74
No	17	19	22	24	24	25	25	26	24	26
Don't know	-	-	-	-	-	-	-	-	-	-

Still, Ontarians continue to be highly concerned about the management of long-term care in Ontario.

- The results indicate those aged 45+ (particularly those aged 65+), women, and those who think the government is on the ‘wrong track’ are the most concerned about long-term care management.

	May 27-31	May 28 -June 1	May 30 -June 2	May 31 -June 3	June 1-4	June 2-6	June 3-7	June 4-8	June 6-9	June 7-10
n=	189	291	410	410	410	410	410	410	410	410
	%	%	%	%	%	%	%	%	%	%
TOTAL CONCERNED	92	93	93	93	92	91	91	92	94	93
Very concerned	70	67	64	61	60	60	61	64	66	66
Somewhat concerned	22	26	29	31	32	31	30	28	28	27
Not too concerned	7	5	5	5	5	5	6	6	4	5
Not at all concerned	1	1	2	2	2	2	1	1	1	1
TOTAL NOT CONCERNED	8	7	7	6	7	7	7	7	5	7
Don't know	<1	1	1	1	1	1	1	1	1	<1

QCV-84. Are you very concerned, somewhat concerned, not too concerned or not at all concerned about how long-term care is being managed in Ontario?

Base: Total sample

Mirroring this high concern about long-term care, the findings continue to suggest that Ontarians recognize that the provincial government is serious about addressing the identified problems in long-term care facilities. Again, weakening intensity (from 46% to 30%) of this perception continues to be evident.

- Those aged 65+, those with incomes \$100k+, and those who see the government on the 'right track' are the most likely to believe the government is serious in fixing the problems in long-term care facilities.

	May 27-31	May 28 -June 1	May 30 -June 2	May 31 -June 3	June 1-4	June 2-6	June 3-7	June 4-8	June 6-9	June 7-10
n=	189	291	410	410	410	410	410	410	410	410
	%	%	%	%	%	%	%	%	%	%
TOTAL SERIOUSLY	80	78	79	81	80	79	77	76	76	78
Very seriously	46	42	37	37	33	34	33	32	33	30
Somewhat seriously	33	36	42	43	47	45	43	44	43	48
Not too seriously	13	14	14	13	12	12	14	15	14	14
Not at all seriously	6	6	6	6	6	6	6	5	6	5
TOTAL NOT SERIOUSLY	19	20	20	18	18	18	20	20	20	19
Don't know	2	2	1	1	2	3	3	3	4	3

The findings suggest over 8-in-10 feel that the government should be doing more to fix the problems in long-term care facilities. Over three-quarters say that an independent commission is the best way to identify problems and recommend improvements.

- These results indicate that those who think the government is on the ‘wrong track’ believe the government should do more to take action to fix the problems. On the other hand, those who see the government on the ‘right track’ are more likely to think the government has done enough to fix the problem.
- Men, those with incomes \$100k+, and those who see the government on the ‘right track’ are the most likely to believe an independent commission is the best way to identify problems and solutions for long-term care.

% VERY/SOMEWHAT AGREE	May 27-31	May 28 -June 1	May 30 -June 2	May 31 -June 3	June 1-4	June 2-6	June 3-7	June 4-8	June 6-9	June 7-10
n=	189	291	410	410	410	410	410	410	410	410
	%	%	%	%	%	%	%	%	%	%
I believe the measures taken by the government are enough to fix the problem	44	45	45	46	46	43	42	42	39	42
I believe that the government should be doing more than it has announced to fix the problem	83	81	80	79	78	79	80	81	81	82
An independent commission is the best way to identify problems and recommend improvements to long-term care in Ontario	77	77	78	79	79	78	76	77	77	76

QCV-86. As you may know, recently the provincial government received a report detailing the sub-standard care of elderly and vulnerable residents in some long-term care facilities in Ontario. In response to these reports, the government announced that it would take some immediate action to address the problems, including a significant increase in inspections of facilities, assuming the control and management of 5 of the homes, and launching an independent commission to investigate and recommend solutions.

Base: Total sample

About three-quarters think the province has been too slow in getting control of the virus outbreaks at long-term care homes.

% STRONGLY/SOMEWHAT AGREE	May 27-31	May 28 -June 1	May 30 -June 2	May 31 -June 3	June 1-4	June 2-6	June 3-7	June 4-8	June 6-9	June 7-10
n=	varies									
	%	%	%	%	%	%	%	%	%	%
The province has been far too slow in getting control of the virus outbreaks at long-term care homes	79	77	76	77	77	77	77	77	75	75

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

GUIDELINES FOR OPENING BUSINESSES



There continues to be high awareness of the guidelines for the re-opening of Ontario businesses.

	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	May 26-30	May 27-31	May 28 -June 1	May 30 -June 2	May 31- June 3	June 1-4	June 2-6	June 3-7	June 4-8	June 6-9	June 7-10
n=	varies																										
	%	%	%	%	%	%	%	%	%	%	%	%	%	%	%	%	%	%	%	%	%	%	%	%	%	%	%
Yes	46	49	52	55	62	63	64	65	67	76	72	74	75	73	73	70	69	69	69	68	65	67	67	70	70	69	72
No	54	50	48	45	38	36	35	34	31	23	27	25	25	27	26	30	31	30	30	31	34	33	32	30	29	30	28
Don't know	<1	<1	<1	-	-	1	1	1	2	1	<1	<1	<1	<1	1	1	<1	1	1	1	1	<1	1	1	1	1	<1

There also continues to be strong support for provincial guidelines to be legally enforced.

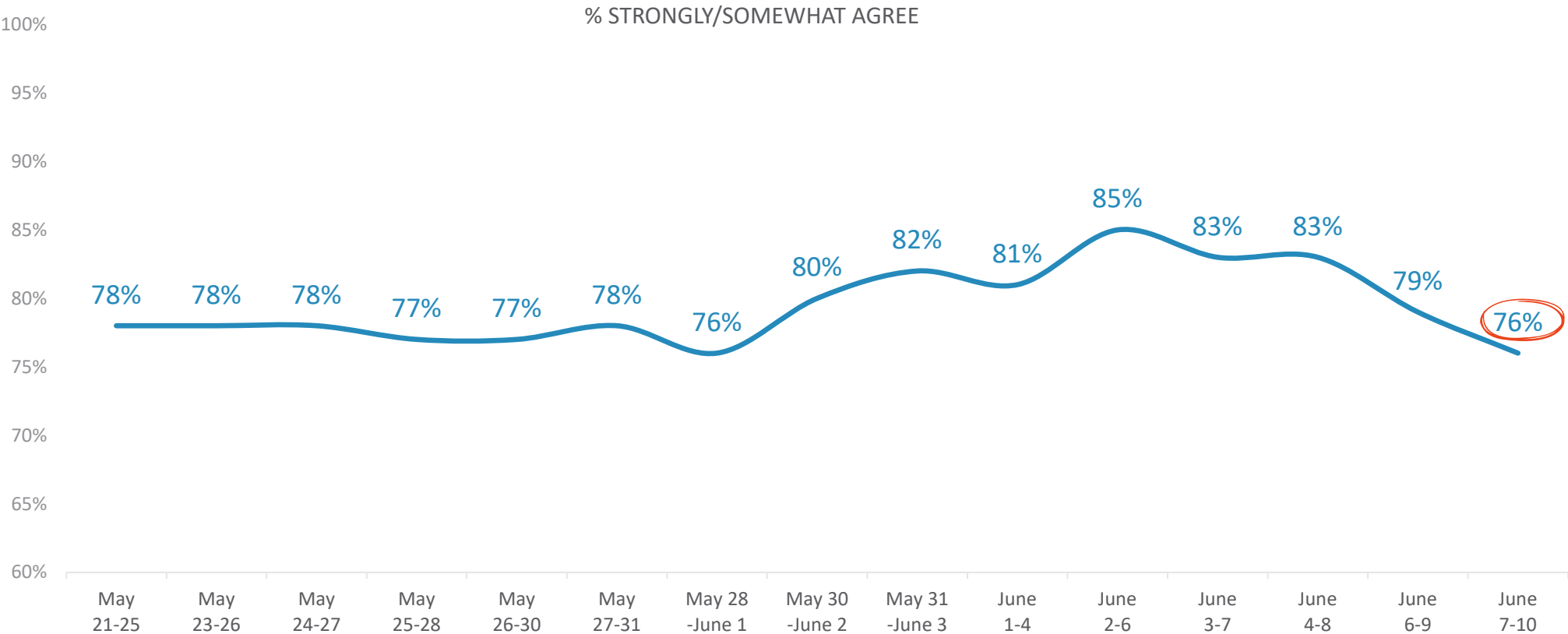
	May 6-10	May 7-11	May 9-12	May 10-13	May 11-14	May 12-16	May 13-17	May 14-19	May 16-20	May 17-21	May 19-23	May 20-24	May 21-25	May 23-26	May 24-27	May 25-28	May 26-30	May 27-31	May 28 -June 1	May 30 -June 2	May 31- June 3	June 1-4	June 2-6	June 3-7	June 4-8	June 6-9	June 7-10
n=	184	242	300	258	209	208	206	208	214	215	276	321	367	410	410	410	410	410	410	410	410	410	410	410	410	410	410
	%	%	%	%	%	%	%	%	%	%	%	%	%	%	%	%	%	%	%	%	%	%	%	%	%	%	%
Voluntary	35	36	35	33	31	27	26	27	26	22	26	27	28	29	27	27	27	29	30	32	31	33	36	34	34	33	33
Legally enforced	63	61	63	65	67	71	73	72	74	77	73	73	71	70	72	72	72	71	69	67	67	66	63	65	65	66	67
Don't know	3	2	2	2	2	2	2	1	1	1	1	1	1	1	1	1	1	1	1	1	1	1	2	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

With the announcement of the Phase 2 regional re-openings, there has been decline in the proportion of people who are saying that they are worried that the longer it takes to open up the economy, the more severely will be the damage to the economy.

I worry that the longer it takes to open up the economy the more severe will be the damage to the economy



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, bases vary

In the latest wave, there has been a jump in the proportion of Ontarians who believe the primary focus of Ontario’s jobs and recovery plan should be ‘infrastructure spending’. Support for the ‘tax cuts’ option has dropped back to 31% in the latest wave.

	May 21-25	May 23-26	May 24-27	May 25-28	May 26-30	May 27-31	May 28 -June 1	May 30 -June 2	May 31- June 3	June 1-4	June 2-6	June 3-7	June 4-8	June 6-9	June 7-10
n=	317	410	410	410	410	410	410	410	410	410	410	410	410	410	264
	%	%	%	%	%	%	%	%	%	%	%	%	%	%	%
Across the board tax cuts designed to give Ontarians more spending power	31	31	32	32	31	31	32	34	34	36	38	37	37	35	31
Increased infrastructure spending designed to create more jobs	65	64	64	63	63	64	64	61	61	59	56	57	58	60	66
Don’t know	4	5	5	5	6	4	4	4	5	5	6	6	5	5	3

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

CONSUMER CONFIDENCE



SPENDING BEHAVIOUR DURING COVID-19 AND WHEN THE ECONOMY REOPENS

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 continue to be reluctant to spend.

SPENDING BEHAVIOUR DURING COVID-19

	May 20-24	May 21-25	May 23-26	May 24-27	May 25-28	May 26-30	May 27-31	May 28-June 1	May 30-June 2	May 31-June 3	June 1-4	June 2-6	June 3-7	June 4-8	June 6-9	June 7-10
n=	227	317	410	410	410	410	410	410	410	410	410	410	410	410	410	410
	%	%	%	%	%	%	%	%	%	%	%	%	%	%	%	%
Spending more than you would normally	16	16	14	13	12	11	12	11	10	9	8	9	13	13	16	16
Spending about as much as you would normally	28	26	27	24	21	21	19	19	23	24	24	28	26	24	25	22
Spending less than you would normally	56	58	60	63	67	68	69	70	67	67	67	62	60	62	58	62
Don't know	-	-	-	-	-	<1	<1	<1	<1	<1	<1	1	1	1	1	1

EXPECTED SPENDING BEHAVIOUR AS THE ECONOMY OPENS UP

	May 20-24	May 21-25	May 23-26	May 24-27	May 25-28	May 26-30	May 27-31	May 28-June 1	May 30-June 2	May 31-June 3	June 1-4	June 2-6	June 3-7	June 4-8	June 6-9	June 7-10
n=	227	317	410	410	410	410	410	410	410	410	410	410	410	410	410	410
	%	%	%	%	%	%	%	%	%	%	%	%	%	%	%	%
Spending more than you would normally	17	18	18	20	19	18	16	14	13	13	13	13	12	12	11	12
Spending about as much as you would normally	46	48	49	48	47	46	44	45	46	47	48	50	50	49	51	51
Spending less than you would normally	37	34	33	32	33	36	38	40	39	39	38	37	37	38	38	37
Don't know	-	-	-	<1	<1	1	2	1	1	1	<1	<1	<1	<1	<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

CONFIDENTIAL

COVID-19 TESTING



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	May 26-30	May 27-31	May 28- June 1	May 30- June 2	May 31- June 3	June 1-4	June 2-6	June 3-7	June 4-8	June 6-9	June 7-10
n=	varies																
	%	%	%	%	%	%	%	%	%	%	%	%	%	%	%	%	%
Anyone who wants to get tested for COVID should be able to get tested	91	91	92	92	93	92	92	93	92	93	92	92	93	93	93	95	94

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

CONFIDENCE IN GOVERNMENT MESSAGING



Most Ontarians continue to express high levels of trust in the government’s communications about COVID-19.

TRUST IN GOV’T COMMUNICATIONS ABOUT COVID-19

	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 26-30	May 27-31	May 28-June 1	May 30-June 2	May 31-June 3	June 1-4	June 2-6	June 3-7	June 4-8	June 6-9	June 7-10
n=	varies																				
	%	%	%	%	%	%	%	%	%	%	%	%	%	%	%	%	%	%	%	%	%
I trust what the Ontario government is telling me about the COVID-19 situation.	80	76	75	75	76	77	79	79	77	81	81	78	76	76	72	71	72	70	73	75	74

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