

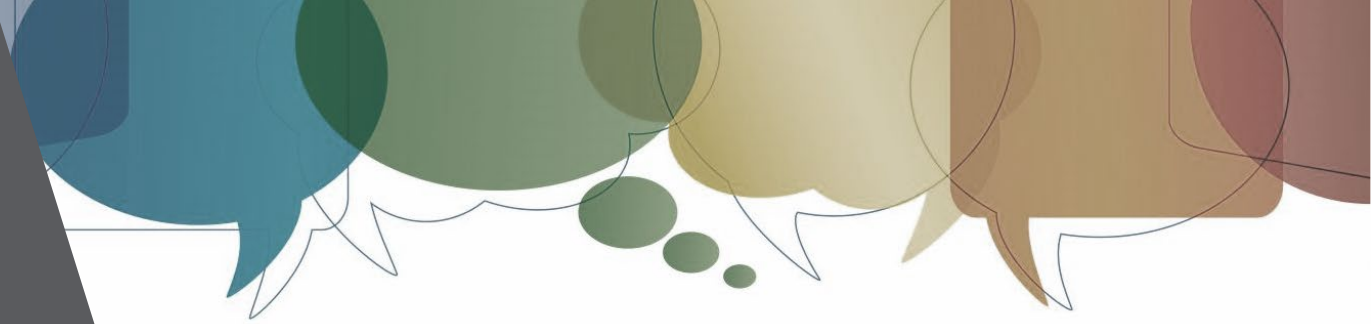


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JUNE 2020 RESEARCH

PULSE REPORT ON COVID-19 – REPORT #36

CABINET OFFICE

June 30th 2020



KEY FINDINGS

Key Findings

1 The government's 'right track' scores have edged back up to 80% in the most recent wave after hitting a low of 74% nine days ago.

This upward movement may stem from Ontarians' watching the exploding virus spread issues unfolding in the US.

4 Moreover, Ontarians are much more confident that the province has COVID-19 under control compared to the other parts of the world, particularly the US. The gap on this measure between Ontario and the other parts of the world has increased significantly (3.0x versus 1.3x) .

2 'Right track' scores are strongest among those who are willing to take 'a great deal of risk' to return to regular life. This group is probably seeing the dangers of moving too quickly when opening up in the US.

'Right track' scores among groups willing to take 'no' or 'some' risk are also trending stronger in recent waves.

5 This observation is also supported by the trend that Ontarians are increasingly accepting that COVID-19 is a significant public health risk.

Still, there is an important caveat to this point: 78% of Ontario witness people everyday not following the social distancing guidelines.

3 Among the economic metrics, the government is performing strongest on 'managing the re-opening'. This has been the strongest economic metric for the past 10 days.

Clearly, Ontarians are aligned with the government's prudent and careful approach to opening up the economy in light of the troubles south of the border.

Responding to the media reports on the benefits of face mask wearing, an increasing number of Ontarians claim they are wearing a face mask 'all of the time' or 'most of the time' when away from home.

Ontarians increasingly believe that mask wearing reduces the risk of COVID-19.

And, Ontarians have moved back up to about 69% (from 58% 9 days ago) who say that some legal codification of mask wearing is needed.

Key Findings

7 Consistent with the other trends, Ontarians are increasingly trusting the government's messaging about the economic re-opening.

Moreover, there has been an increase in the trust on the general COVID-19 situation in recent waves.

8 Ontarians overwhelmingly oppose the opening up of the Canadian border to non-essential US visitors. The strength of the opposition is striking: 66% are 'strongly' opposed to this idea.

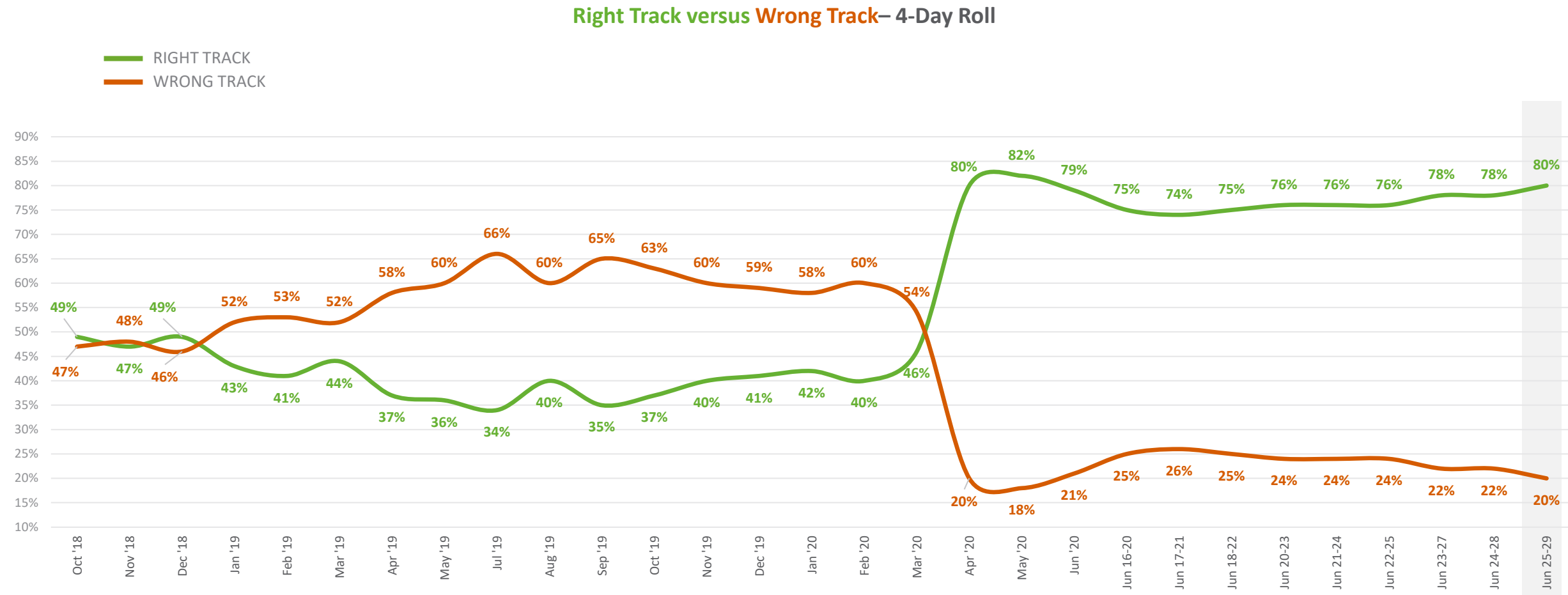
9 Not surprisingly, Ontarians are very supportive of buying food and goods locally and from Ontario-owned retailers. Early results suggest that there is only a slight erosion of the willingness to buy locally even if the prices are a bit higher.

This simply underscores Ontarians desiring less dependency on external markets to provide goods and services to them.

RIGHT TRACK
WRONG TRACK



The government’s ‘right track’ scores have edged back up to 80% in the most recent wave after hitting a low of 74% nine days ago. This upward movement may stem from Ontarians’ watching the exploding virus issues unfolding in the US.

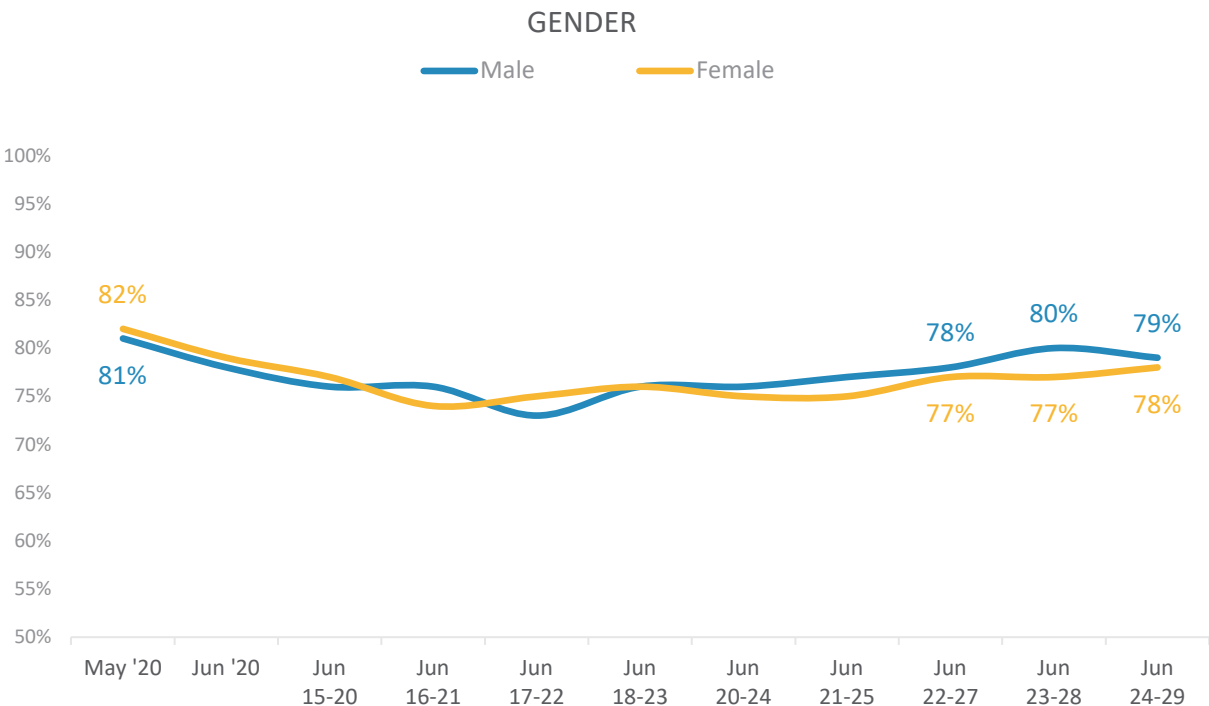
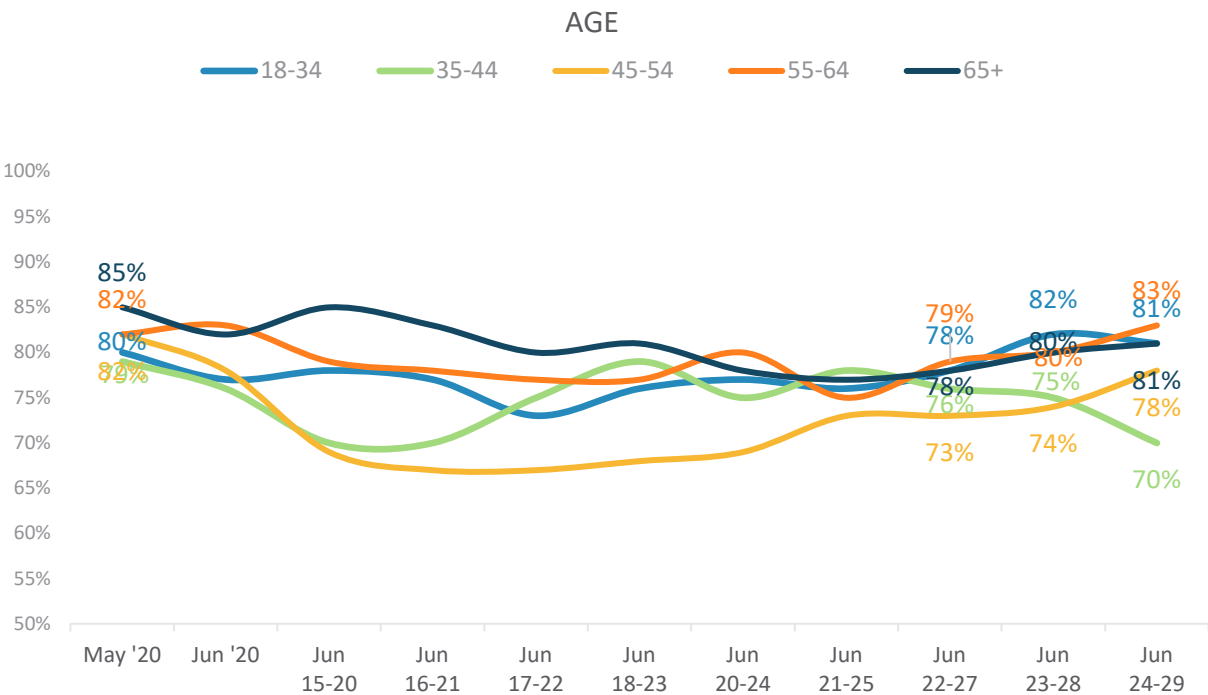


These graphs are based on 4 day roll in order to boost the sample sizes.

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

‘Right track’ scores have strengthened among those aged 45-64 in recent waves, while softening among those aged 35-54.

Right Track Scores – 5-Day Roll

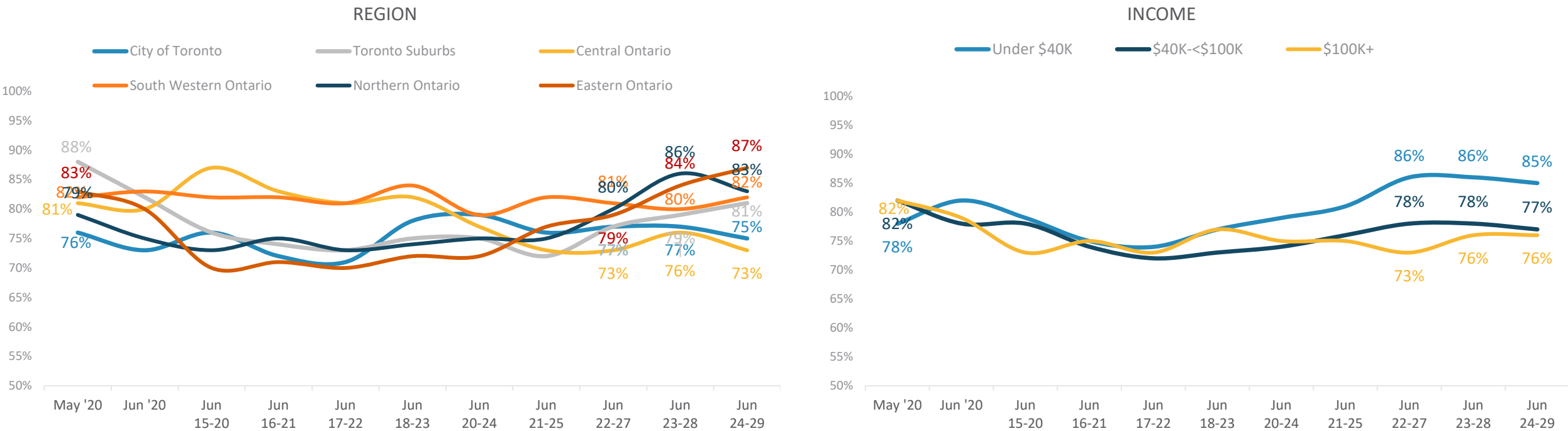


These graphs are based on 5 day roll in order to boost the sample sizes.

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

‘Right track’ scores are strongest among those earning <\$40k over the past 6 waves. ‘Right track’ scores seen to be rebounding in Eastern/Northern Ontario and Toronto suburbs, but weakening in Central Ontario.

Right Track Scores – 5-Day Roll

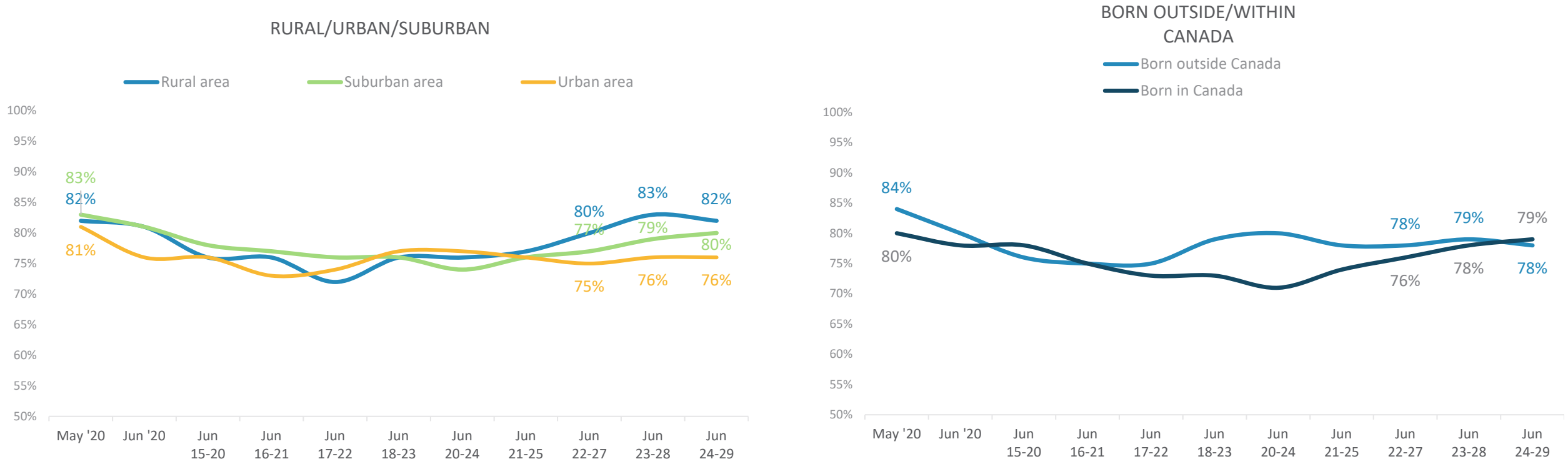


These graphs are based on 5 day roll in order to boost the sample sizes.

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

Over the past three days, ‘right track’ scores are stronger among rural and suburban residents.

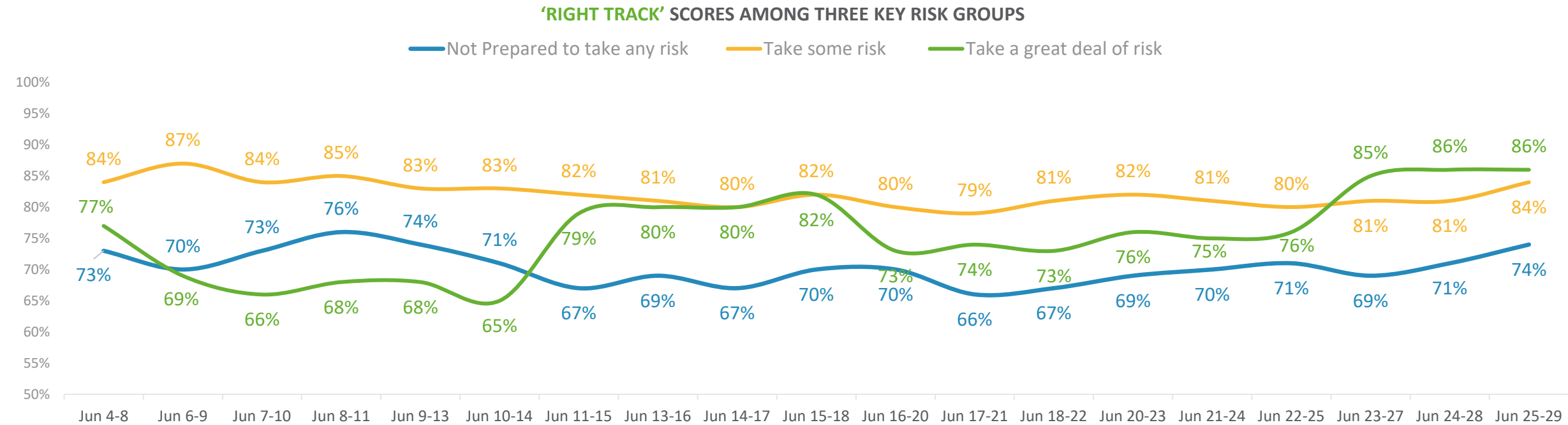
Right Track Scores – 5-Day Roll



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

‘Right track’ scores are strongest among those who are willing to take ‘a great deal of risk’ to return to regular life. This group is probably seeing the dangers of moving too quickly when opening up the US. ‘Right track’ scores for all ‘risk’ groups are trending stronger.



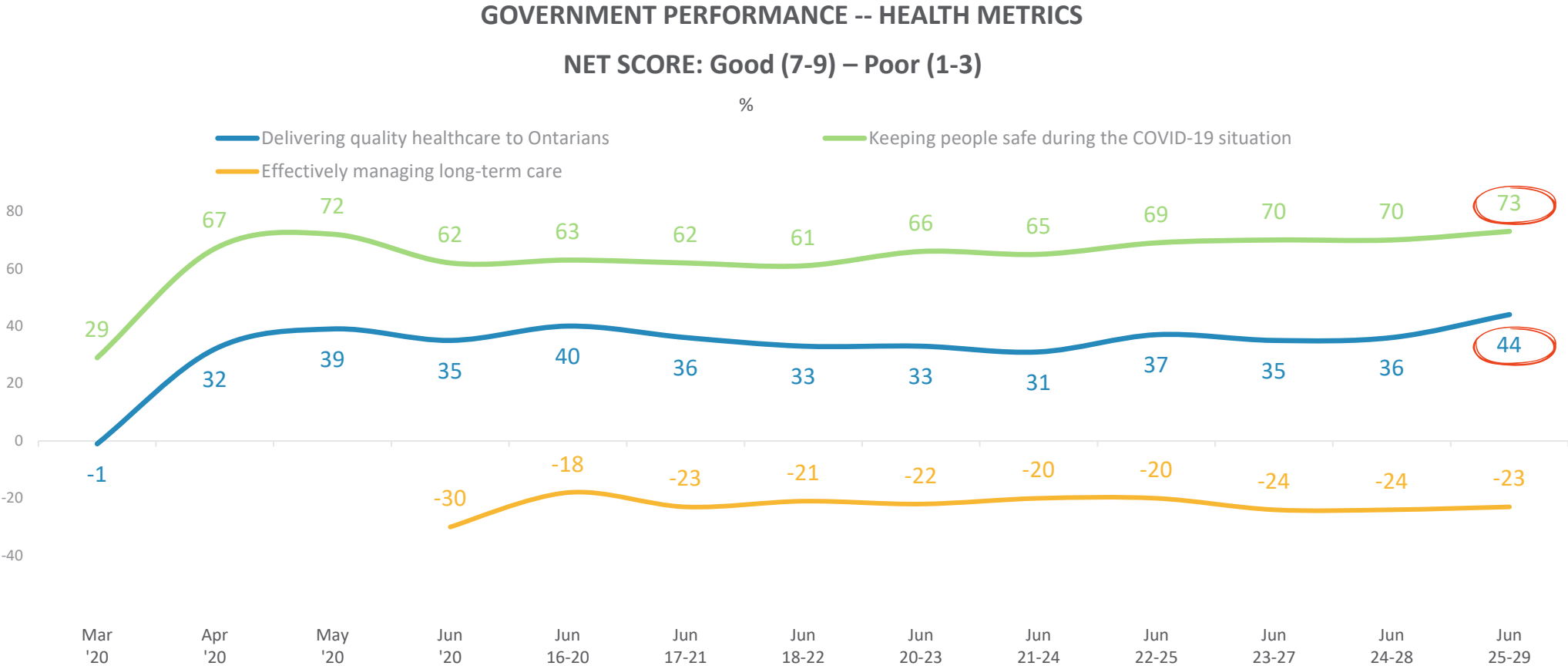
Q2. Overall, do you feel that the Ontario provincial government is on the right track or the wrong track, in terms of how it is governing the province? Base: Total sample

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?: I am not prepared to take any risk of me or a family member contracting COVID-19 in order to get back to work sooner and engage in our regular activities (1/2); I am prepared to take some risk of me or a family member contracting COVID-19 if it means we can all go back to work sooner and engage in our regular activities (3/4/5); I am prepared to take a great deal of risk of me or a family member contracting COVID-19 if it means we can all go back to work sooner and engage in our regular activities (6/7)

PERCEPTIONS OF GOVERNMENT PERFORMANCE DURING COVID-19 PANDEMIC

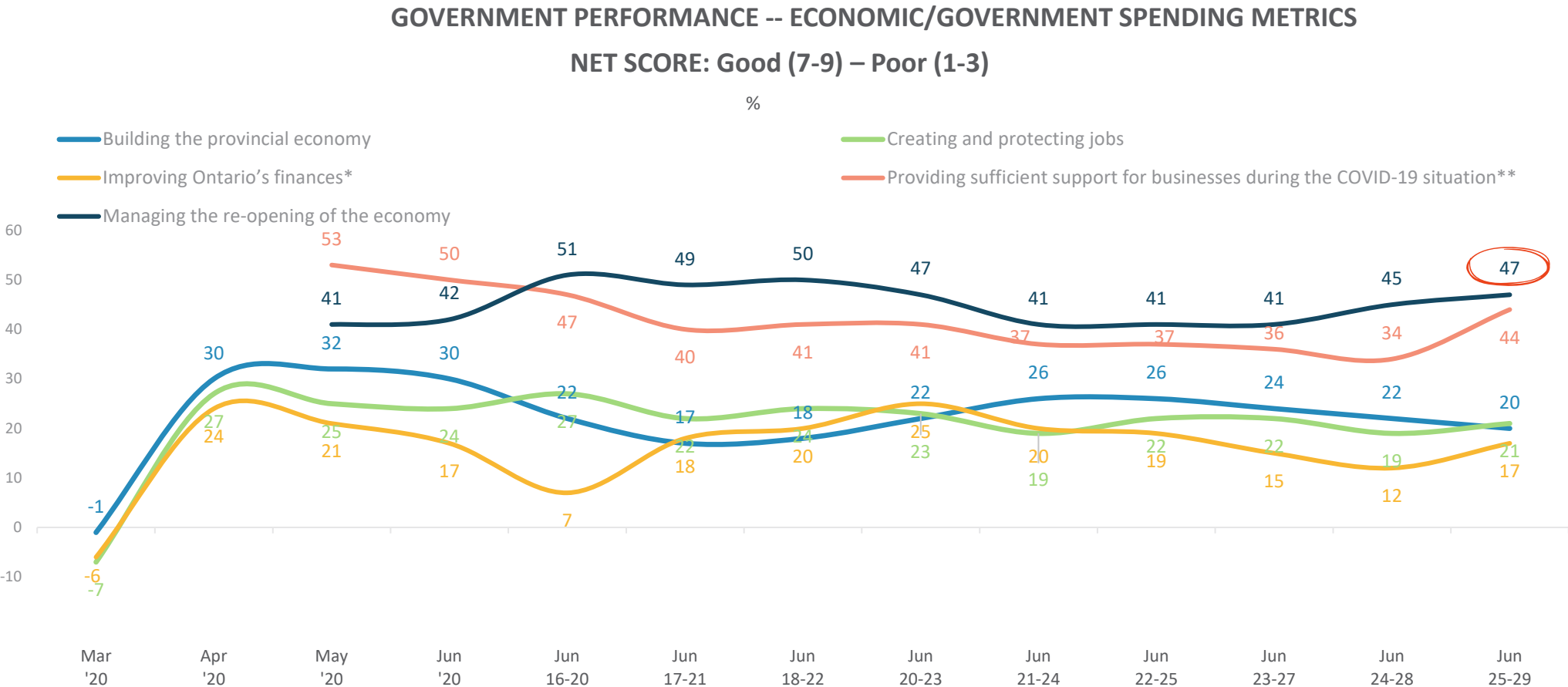


For the past week, perceptions toward the government’s performance on the key health metrics ‘delivering quality healthcare to Ontarians’ and ‘keeping people safe during the COVID-19 situation’ have been moving in a positive direction.



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 over past 10 days or so, the government is perceived to be performing strongest on ‘managing the re-opening’. It declined somewhat after the news of the City of Toronto Phase 2 re-opening, but over the past three days it has trended upward.



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?

*Former phrasing: “Improve Ontario’s finances”

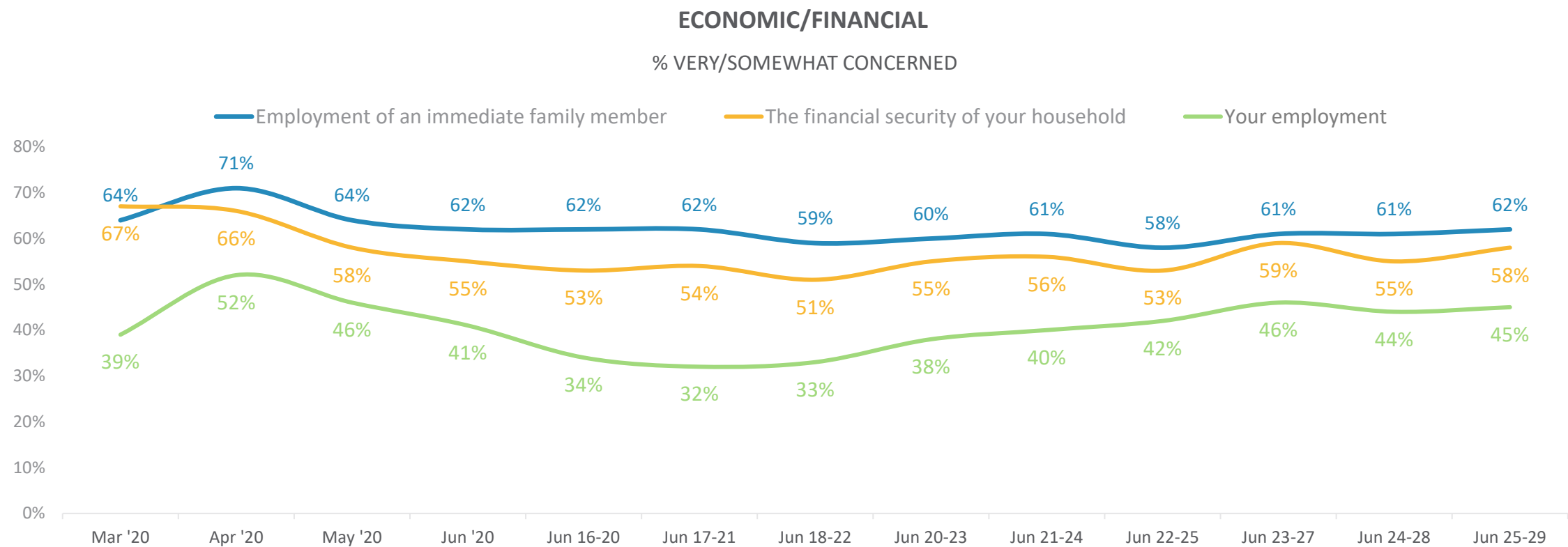
**Former phrasing: “Sufficient business support during the COVID-19 situation”

Bases vary

CONCERNS ABOUT IMPACT OF COVID-19



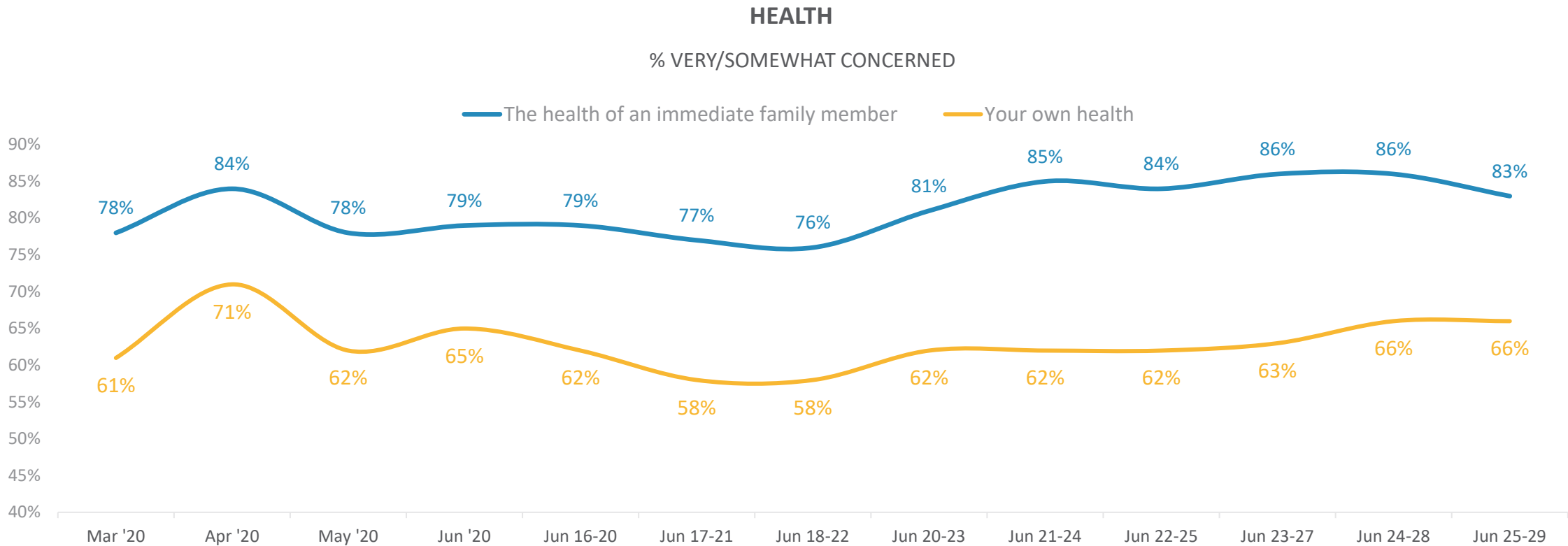
Across the almost three months of the COVID-19 pandemic, the anxiety of Ontarians about employment and financial security remains deep, but is declining somewhat. As the province moves into Phase 2 re-opening, economic and financial concerns have eased slightly.



QCV-1. As the province continues to open-up and more of what was locked-down becomes available, how concerned are you that COVID-19 will impact you personally in each of the following ways? (previous phrasing) How concerned are you that the coronavirus or COVID-19 will impact you personally in each of the following ways? (Wave 1 phrasing) How concerned are you that the coronavirus or COVID-19 will affect you personally in each of the following ways?

Base: Total sample

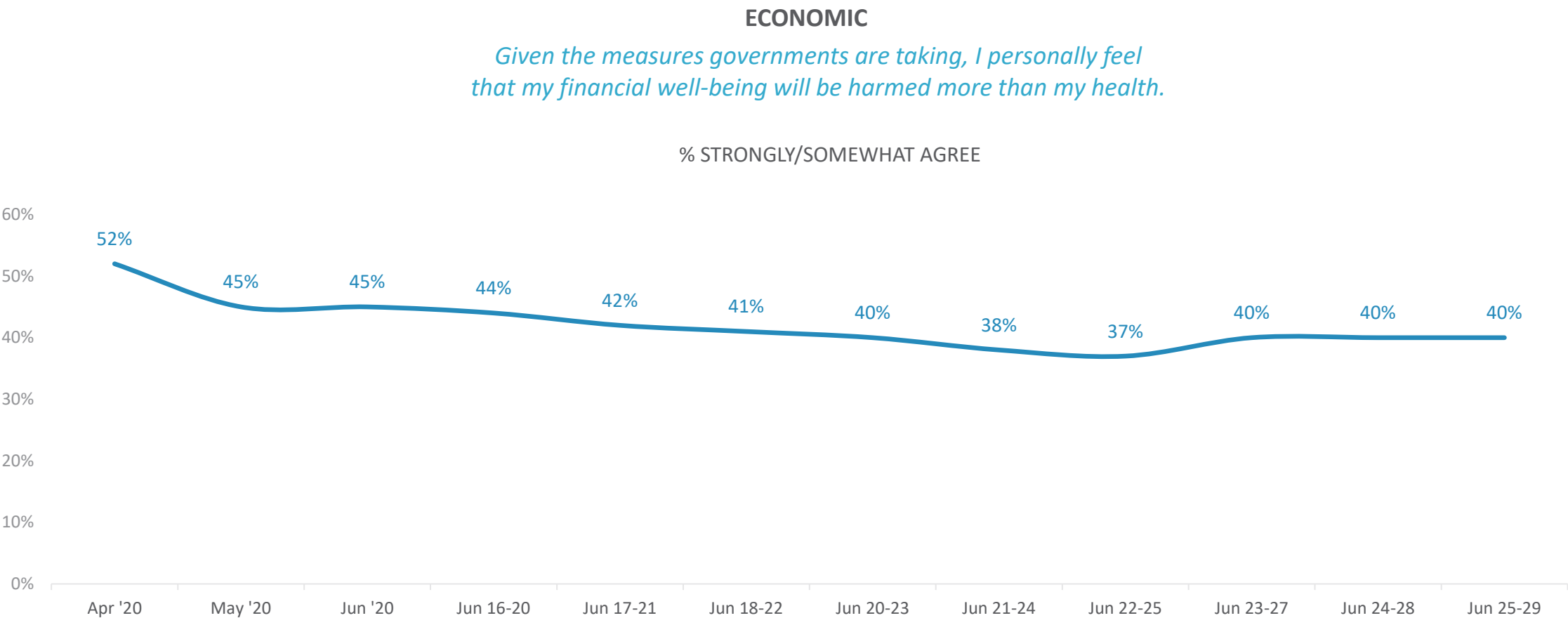
In contrast, the anxiety of Ontarians about their health remains deep and unchanged.



QCV-1. As the province continues to open-up and more of what was locked-down becomes available, how concerned are you that COVID-19 will impact you personally in each of the following ways? (previous phrasing) How concerned are you that the coronavirus or COVID-19 will impact you personally in each of the following ways? (Wave 1 phrasing) How concerned are you that the coronavirus or COVID-19 will affect you personally in each of the following ways?

Base: Total sample

Ontarians have generally become less concerned about their financial well-being compared to the health risks.



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

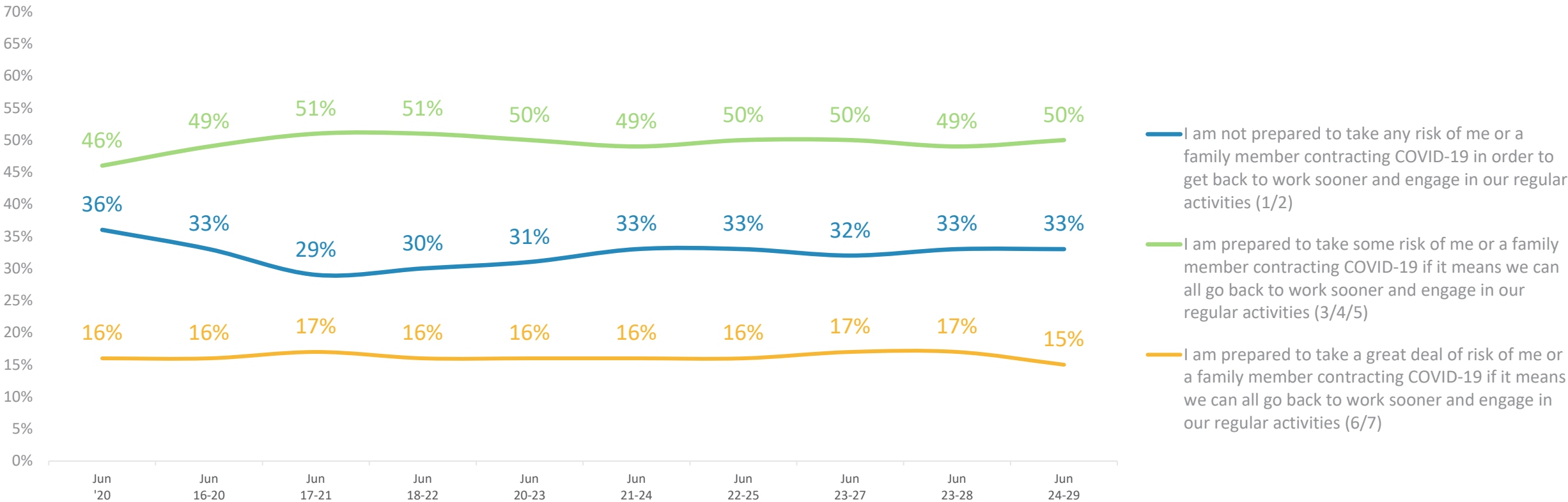
COVID-19 RISK TOLERANCE



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

Over the past week, views about the amount of risk people wish to take to get back to regular life have not changed. About 65% continue to say they are willing to take at least ‘some’ risk in order to get back to a regular life. About one-third continue to want to take ‘no risk’.

- Women, those over the age of 65, those earning <\$40k, and those who think the government is on the ‘wrong track’ are more likely not to want to take ‘any risk’ in order to go back to regular life. Those willing to take ‘a great deal of risk’ are: men, those aged 34-44, and those earning >\$100k.

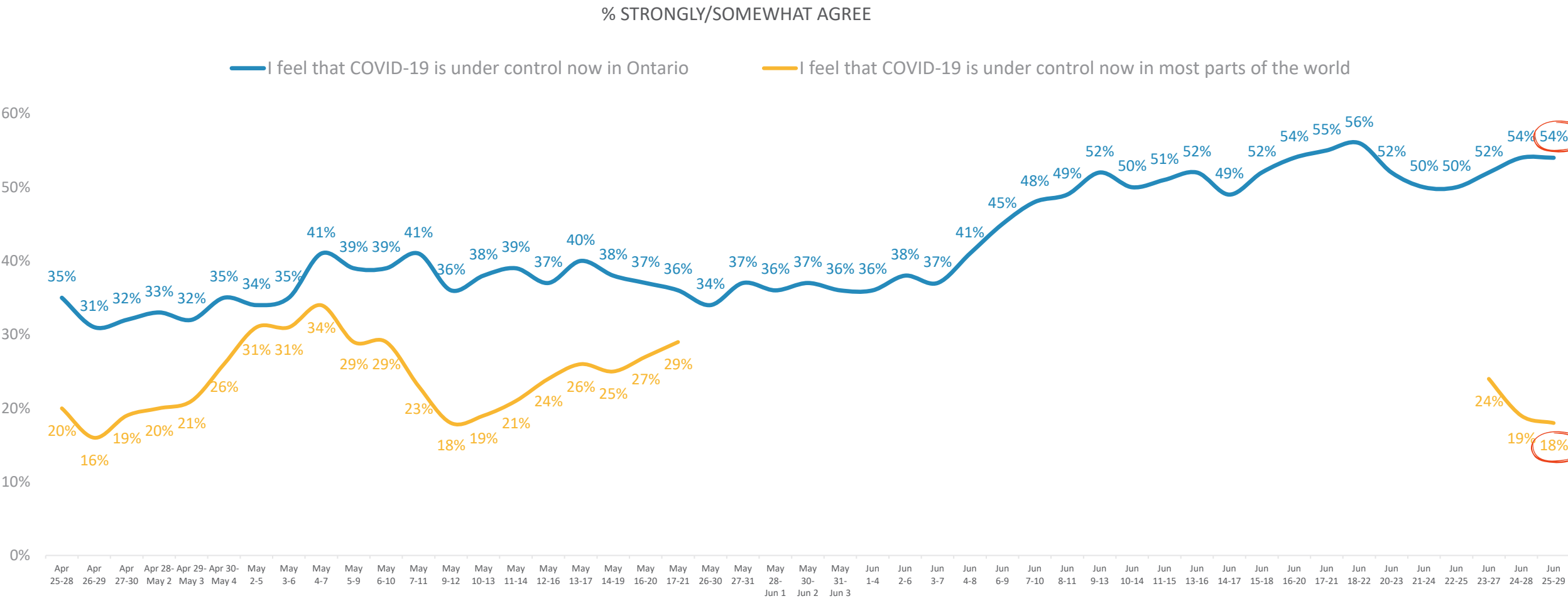


QCV-73. Where would you place yourself on the following scale about the risk of contracting COVID – 19 and opening up the economy more quickly?
Base: Total sample (“Engage in our regular activities” added to statements June 11)

PERCEPTIONS ABOUT WHETHER COVID-19 IS UNDER CONTROL

After peaking a week ago, over 1-in-2 say that COVID-19 is under control in the province. However, the gap (3.0x versus 1.3x) between Ontario and the rest of world has increased significantly.

- Those aged 55-64, Central Ontario residents, those earning >\$100k, those who think the government is on the 'right track', those born outside Canada, and those with children living at home are the most likely to feel that COVID-19 is under control 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

Ontarians are increasingly accepting that COVID-19 is a significant public health risk. As Ontarians watch events unfold south of the border, they clearly see that the virus remains a serious threat to public health.

- Still, about 71% say they are trying to get back to a normal pre-COVID-19 life. Key groups who are trying to get back to regular life pre-COVID-19 are: men, those earning <\$100k, suburban residents, and those with children over the age of 18 in their homes.
- Rural and SouthWest Ontario residents are the most likely to think that COVID-19 is not a significant public risk.
- Key groups who see people not practicing social distancing guidelines are: men, suburban residents, those earning >\$40k and those aged 45-54.

% STRONGLY/SOMEWHAT AGREE	June 10-14	June 11-15	June 13-16	June 14-17	June 15-18	June 16-20	June 17-21	June 18-22	June 20-23	June 21-24	June 22-25	June 23-27	June 24-28	June 25-29
n=	varies													
	%	%	%	%	%	%	%	%	%	%	%	%	%	%
I think the threat of contracting COVID-19 is much less now than it was a month ago	54	54	57	60	61	65	63	62	59	60	60	61	63	59
I am doing my best to get <u>back</u> to living a normal pre-COVID-19 life	70	71	72	70	69	67	69	72	74	71	70	70	69	71
COVID-19 is no longer a significant public health risk	12	13	13	14	14	13	15	15	14	11	10	9	8	9
I see people everyday not following the social distancing guidelines	72	75	75	76	78	79	81	81	83	82	79	78	77	78

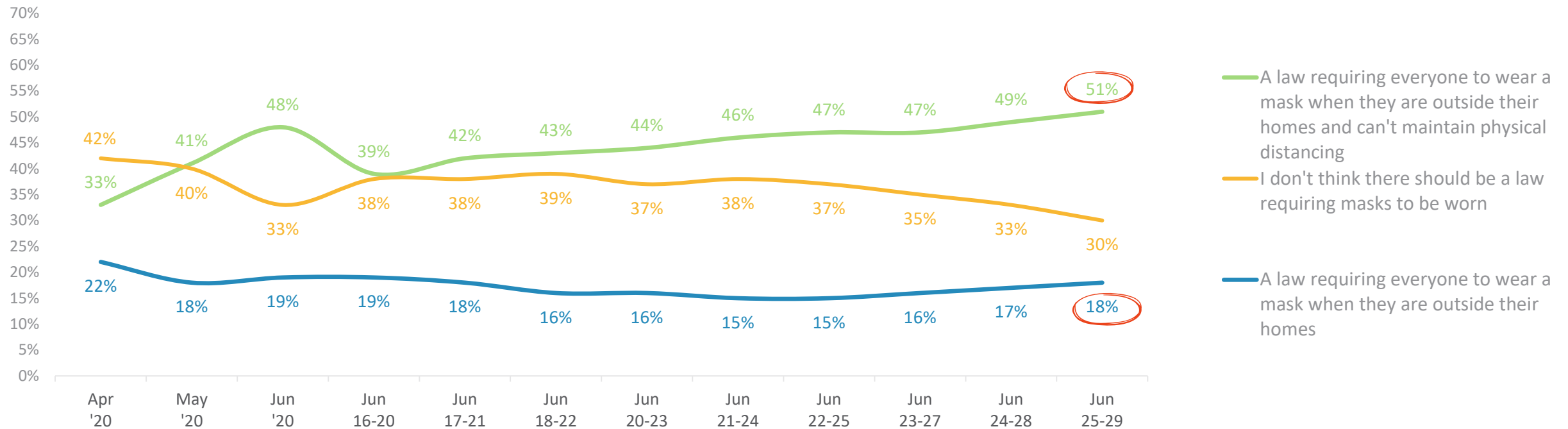
MASK WEARING PERCEPTIONS



MAKING THE WEARING OF A MASK A LEGAL REQUIREMENT

Ontarians have moved back up to about 69% (from 58% 9 days ago) who say that some legal codification of mask wearing is needed. And, a declining number of Ontarians do not want a law requiring everyone to wear a mask outside their homes.

- Men, those earning <\$40k, rural residents, those born outside Canada, and those with children aged >18 living at home are the most inclined not to think there should be a law requiring masks to be worn.
- Women, those earning >40k, and suburban/urban residents are more likely to think some legal codification needs to occur.



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

Base: Total sample

CONFIDENTIAL

Ontarians increasingly believe that mask wearing reduces COVID-19 risks. Interestingly, there is a declining percentage who feel it is not comfortable wearing a mask when they leave their home. And, some 38% think it is uncomfortable to wear a mask for more than a few minutes.

- Men, those aged 65+, those earning <\$40k, those born in Canada, and rural residents are the least likely to believe that mask wearing reduces the risk of the virus.
- The sub-groups more likely to say they are not comfortable wearing a mask outside their home are: men, those aged 35+, those earning <\$40k, rural residents, and those who think the government is on the 'right track'.

% STRONGLY/SOMEWHAT AGREE	June 10-14	June 11-15	June 13-16	June 14-17	June 15-18	June 16-20	June 17-21	June 18-22	June 20-23	June 21-24	June 22-25	June 23-27	June 24-28	June 25-29
n=	varies													
	%	%	%	%	%	%	%	%	%	%	%	%	%	%
I am not comfortable wearing a mask when I leave my home	34	32	31	27	28	29	30	31	32	30	27	25	25	25
Wearing a mask reduces the risk of COVID-19 for everyone	79	78	83	83	84	84	85	83	83	81	82	84	86	89
I find masks too uncomfortable to wear for more than a few minutes	36	38	39	38	40	37	37	38	38	40	38	38	38	38

FREQUENCY OF FACE MASK WEARING

Responding to the media reports on the benefits of face mask wearing, an increasing number of Ontarians claim they are wearing a face mask ‘all of the time’ or ‘most of the time’ when away from home, while less than 1-in-5 say they ‘rarely’ or ‘never’ wear a mask.

- Women, those aged 55-64, those earning \$40-\$60k, GTA residents, suburban residents, those born outside Canada, and those with no children living at home are the most inclined to say they are wearing face masks ‘all/most of the time’.

	June 18-22	June 20-23	June 21-24	June 22-25	June 23-27	June 24-28	June 25-29
n=	313	400	400	410	410	410	410
%	%	%	%	%	%	%	%
TOTAL ALL/MOST OF THE TIME	52	52	52	52	54	55	58
All of the time	26	27	27	23	25	25	25
Most of the time	26	25	26	29	29	31	33
Some of the time	26	26	28	28	26	25	24
Rarely	19	18	15	17	17	16	15
Never	4	3	4	3	3	4	3
RARELY/NEVER	23	21	20	20	20	20	18

QD1B. As a result of COVID-19 and thinking about your daily activities when you are away from home, how often do you wear a face mask?

Base: Total sample

CONFIDENTIAL

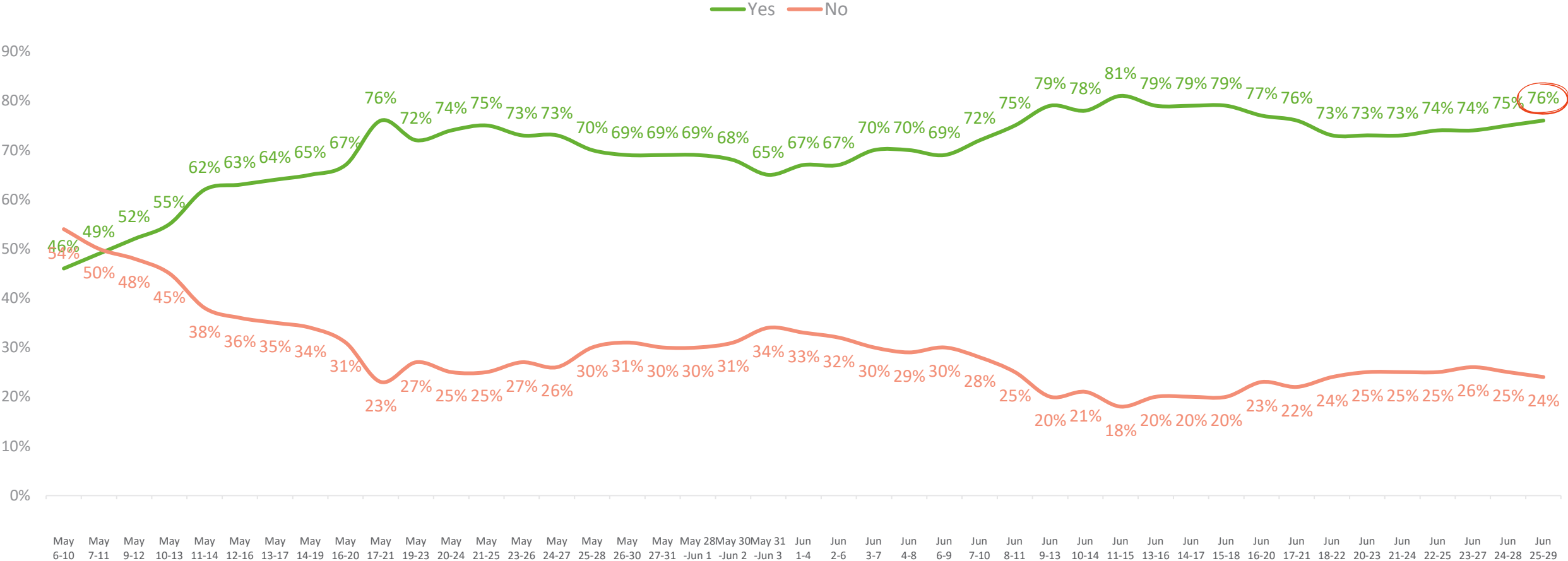
GUIDELINES FOR OPENING BUSINESSES



AWARENESS OF PROVINCIAL GUIDELINESS FOR RE-OPENING BUSINESSES

Over the past 8 days, awareness of the guidelines for the re-opening of Ontario businesses has remained stable at 76%.

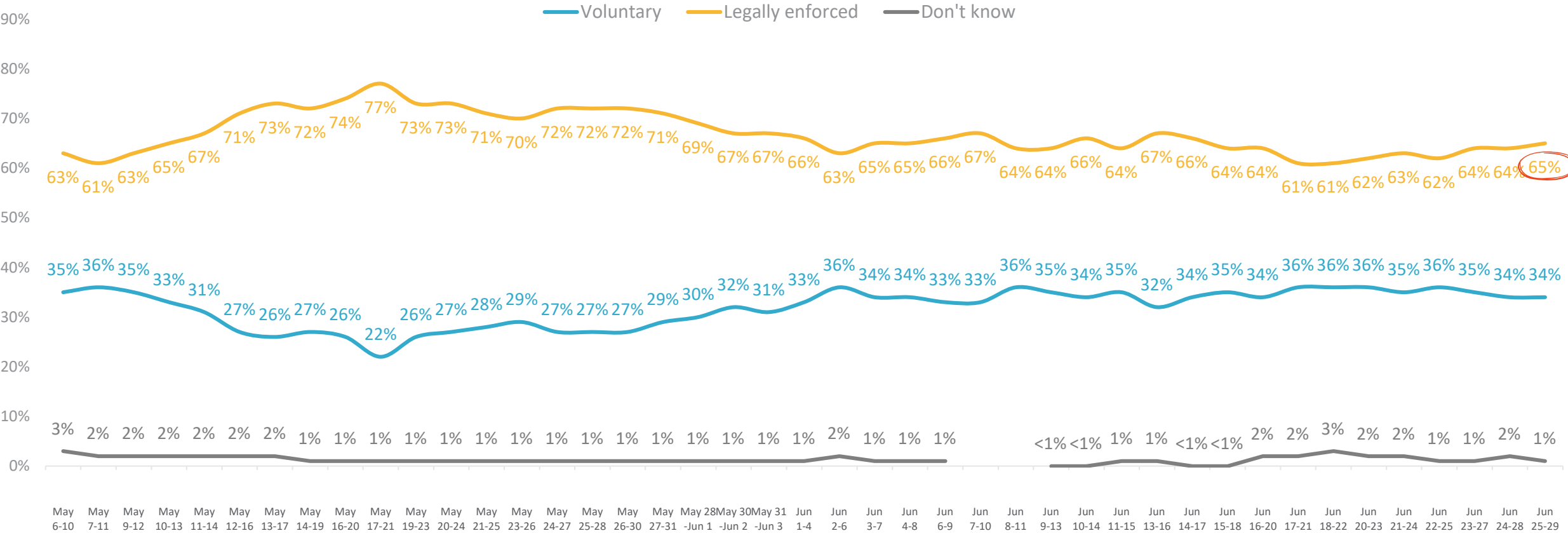
- Women, those earning >\$40k, rural residents, and those aged 55+ are the most aware of these guidelines.



PROVINCIAL GUIDELINESS FOR RE-OPENING BUSINESSES – VOLUNTARY OR LEGALLY ENFORCED

Over the past three days, support for provincial guidelines to be legally enforced remains strong.

- Those who want these guidelines to be codified are: women, those aged 18-34, and those earning >\$100k.



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 (May 6-10 n=184, May 7-11 n=242, May 9-12 n=300, May 10-13 n=258, May 11-14 n=209, May 12-16 n=208, May 13-17 n=206, May 14-19 n=208, May 16-20 n=214, May 17-21 n=215, May 19-23 n=276, May 20-24 n=321, May 21-25 n=367, from May 23-26 and onward n=410, June 16-20 and onward n=400, Jun 23-27 n=410, June 24-28 n=410, June 25-29 n=410)

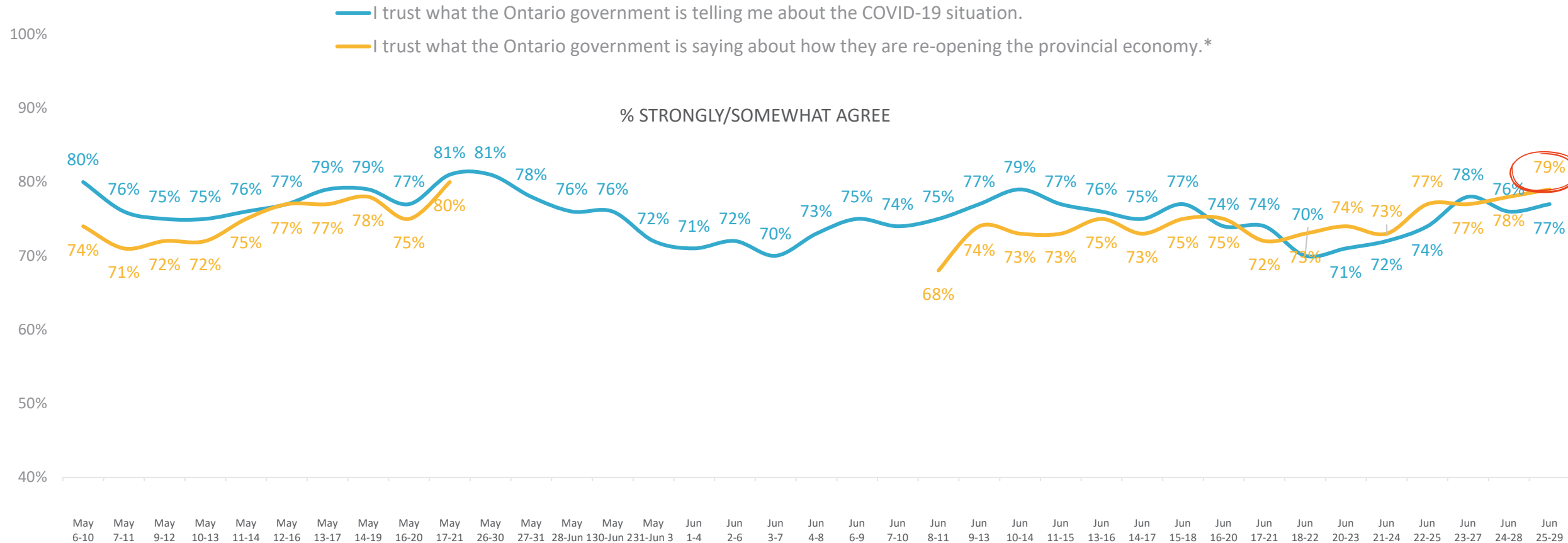
CONFIDENCE IN GOVERNMENT COVID-19 MESSAGING



TRUST IN THE GOVERNMENT’S COMMUNICATIONS ABOUT COVID-19

Ontarians are increasingly trusting the government’s messaging about the economic re-opening. Moreover, there has been an increase in trust on the general COVID-19 situation in recent waves.

- Those aged 55-64, those earning >\$100k, and those who believe the government is on the ‘right track’ are the most likely to trust the messaging of the Ontario government on the effects of COVID-19.
- Those aged 55-64, those earning >\$100k, rural residents, and those who believe the government is on the ‘right track’ are the most likely to trust government messaging on the re-opening of 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, base varies * Previous phrasing: I trust what the Ontario government is saying about how they plan to re-open the provincial economy

About 72% say they have enough information about the virus. And, about 1-in-2 say they are paying less attention to COVID-19 news or information. However, interestingly, Ontarians are less likely to reject the view that they don’t need to hear any more news about the virus.

- Men, those earning <\$40k, rural residents, and those with children living in the household feel they have enough information.

% STRONGLY/SOMEWHAT AGREE	June 10-14	June 11-15	June 13-16	June 14-17	June 15-18	June 16-20	June 17-21	June 18-22	June 20-23	June 21-24	June 22-25	June 23-27	June 24-28	June 25-29
n=	varies													
	%	%	%	%	%	%	%	%	%	%	%	%	%	%
I’m paying less attention to news or information about COVID-19	50	53	51	51	50	47	47	52	53	51	53	51	50	52
I feel that I have enough information about COVID-19	70	70	69	69	69	68	68	67	67	69	70	71	72	72
I feel that I don’t <u>need</u> to hear any more news about COVID-19	24	26	24	22	23	20	22	23	21	23	20	20	21	19

SUPPORT FOR
OPENING UP THE
CANADIAN BORDER
TO NON-ESSENTIAL US VISITORS



Ontarians overwhelmingly oppose the opening up of the Canadian border to non-essential US visitors. The strength of the opposition is striking: 66% are ‘strongly’ opposed to this idea.

- Men, those aged 35-44, those earning <\$40k, rural residents, and those with children aged <18 living in the household are the most likely to support opening the borders to non-essential US visitors.

	June 25-29
n=	294
	%
TOTAL SUPPORT	16
Strongly support	5
Somewhat support	10
Neither support nor oppose	3
Somewhat oppose	13
Strongly oppose	66
TOTAL OPPOSE	79
Don't know/not sure	2

BUYING GOODS AND SERVICES
LOCALLY



Not surprisingly, Ontarians are overwhelmingly supportive of buying food and goods locally and from Ontario owned retailers. Early results suggest that there is only a slight erosion of the willingness to buy locally even if the prices are a bit higher.

How important is it to you personally that you ... (% Very/Somewhat Important)	June 25-29
... buy food produced in Ontario	97%
... buy goods produced in Ontario	94%
... ‘Shop local’	94%
... Buy goods and services from Ontario-owned retailers	91%

How likely would you be to buy an Ontario-produced product if it cost ... (% Very/Somewhat Likely)	June 25-29
... 5% more than a similar, non-Ontario produced one?	93%
... 10% more than a similar, non-Ontario produced one?	84%
... 20% more than a similar, non-Ontario produced one?	81%

QCV-101. Many local businesses were forced to close during the pandemic and are suffering. As they begin to reopen, how important or not is it to you personally that you.....?
QCV-102. How likely would you buy an Ontario produced product if it cost 20% more than a similar, non-Ontario produced one?
QCV-103. How likely would you buy an Ontario produced product if it cost 10% more than a similar, non-Ontario produced one?
QCV-104. How likely would you buy an Ontario produced product if it cost 5% more than a similar, non-Ontario produced one?
Base: Total sample, bases vary