

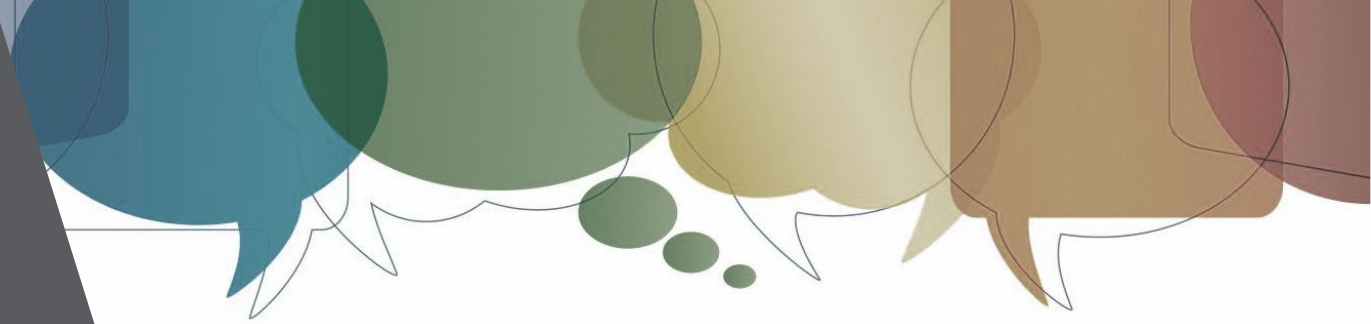


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JUNE 2020 RESEARCH

PULSE REPORT ON COVID-19 – REPORT #37

CABINET OFFICE

July 3rd 2020



KEY FINDINGS

Key Findings

1 The government's 'right track' scores have edged back up to 82% in the most recent wave (and 84% in the Wednesday wave) after hitting a low of 74% almost two weeks 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 Among the economic metrics, the government is performing strongest on 'managing the re-opening'. It peaked at its highest level in the latest wave. This has been the strongest economic metric for almost two weeks.

Clearly, Ontarians are aligned with the government's prudent and careful approach to opening up the economy in light of the COVID-19 troubles south of the border.

5 In the latest waves, Ontarians have shifted significantly toward some level of legal codification of face mask wearing: two weeks ago, 58% wanted some legal codification. Now this percentage has risen to 78%.

In contrast, a declining number of Ontarians do not want a law requiring everyone to wear a mask.

3 Paradoxically, concern of Ontarians about their personal health increased 10-points over the past three waves and increased 18-points since mid-June. 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: 77% of Ontarians witness people everyday not following the social distancing guidelines.

6 Responding to the media reports on the benefits of face mask wearing, an increasing number of Ontarians claim (now 60%, up from 52%) 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.

Key Findings

2 Ontarians overwhelmingly oppose the opening up of the Canadian border to non-essential US visitors. The strength of the opposition is striking: 69% are 'strongly' opposed to this idea.

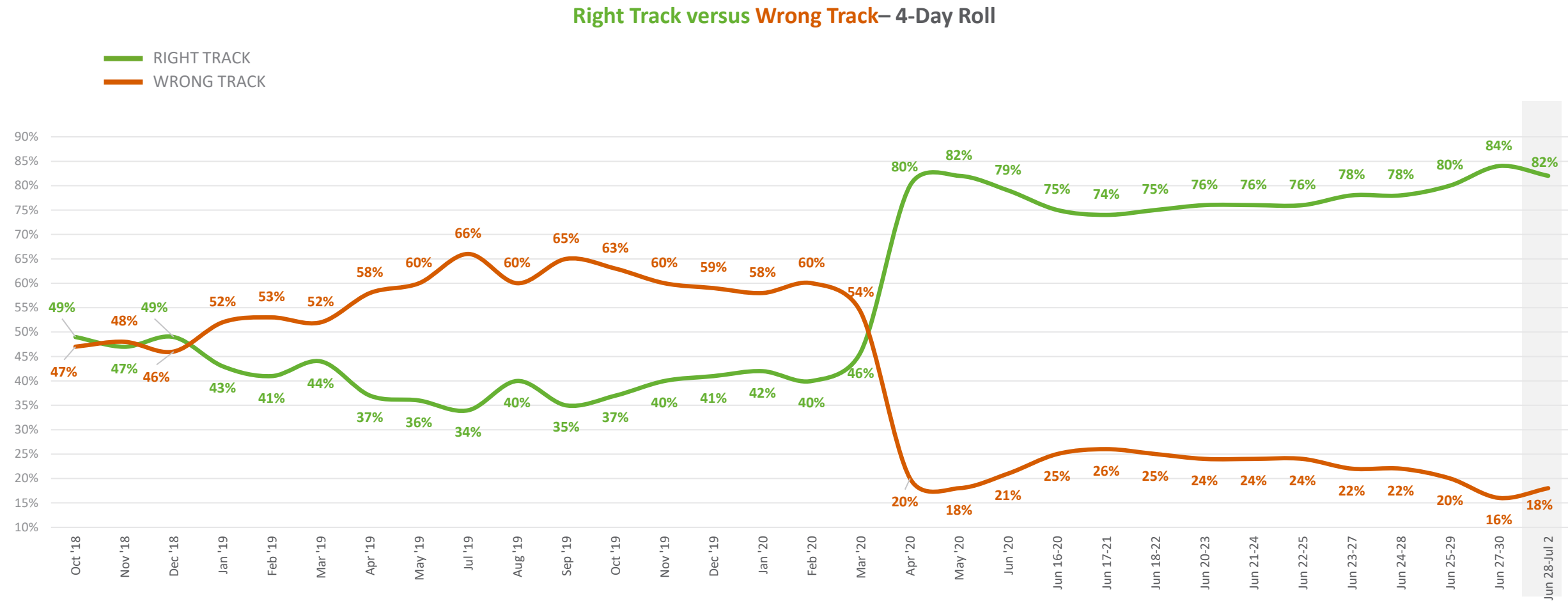
3 Not surprisingly, Ontarians are very supportive of buying food and goods locally and from Ontario-owned retailers. There is a significant decline in likelihood to buy if Ontario products cost 20% more.

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 84% on Wednesday and 82% on Thursday, after hitting a low of 74% two weeks ago.

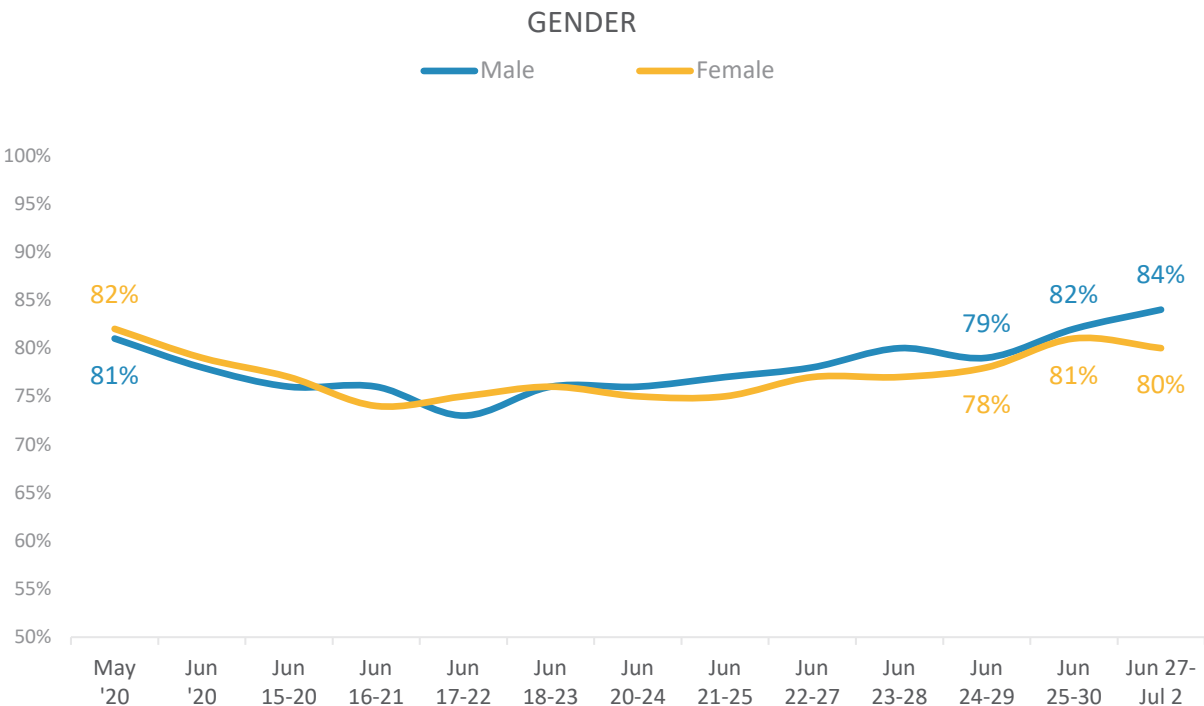
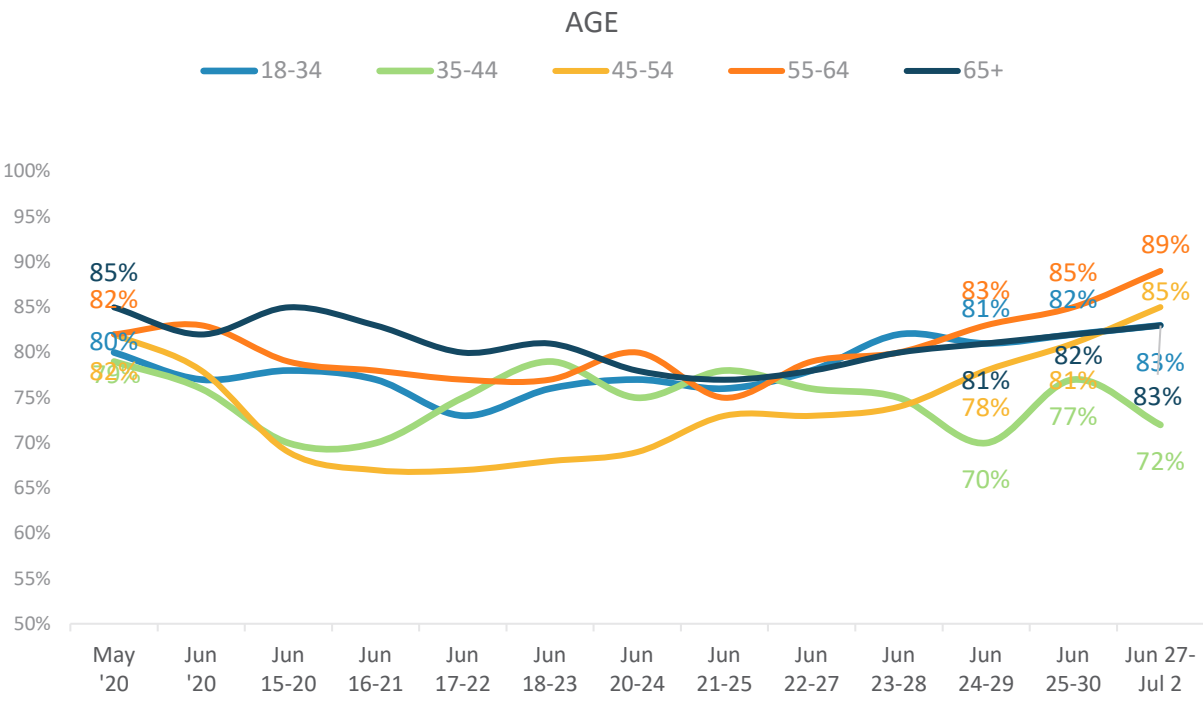


These graphs are based on 4 day roll in order to boost the sample sizes.

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, and men, in recent waves.

Right Track Scores – 5-Day Roll

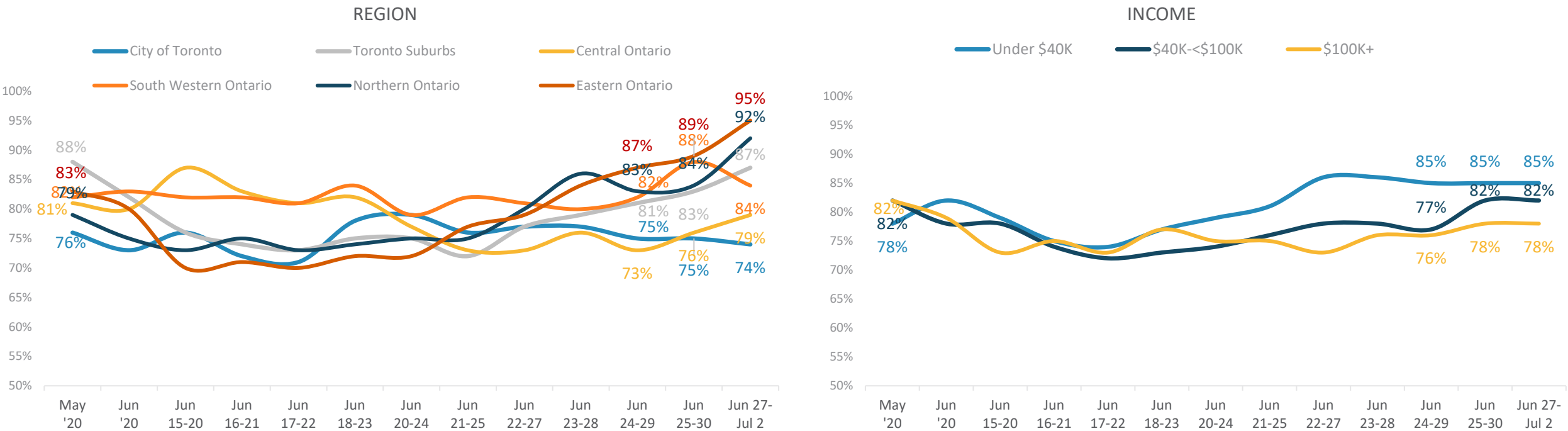


These graphs are based on 5 day roll in order to boost the sample sizes.

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 have strengthened in most regions except for the City of Toronto.

Right Track Scores – 5-Day Roll

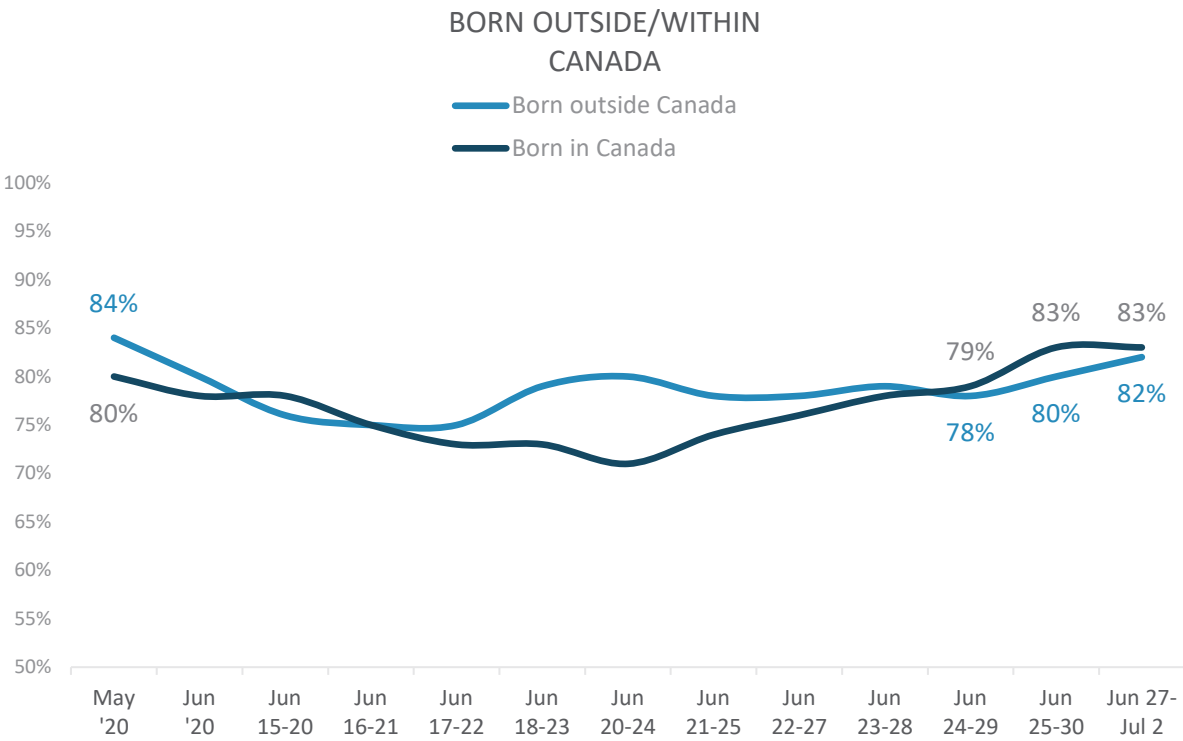
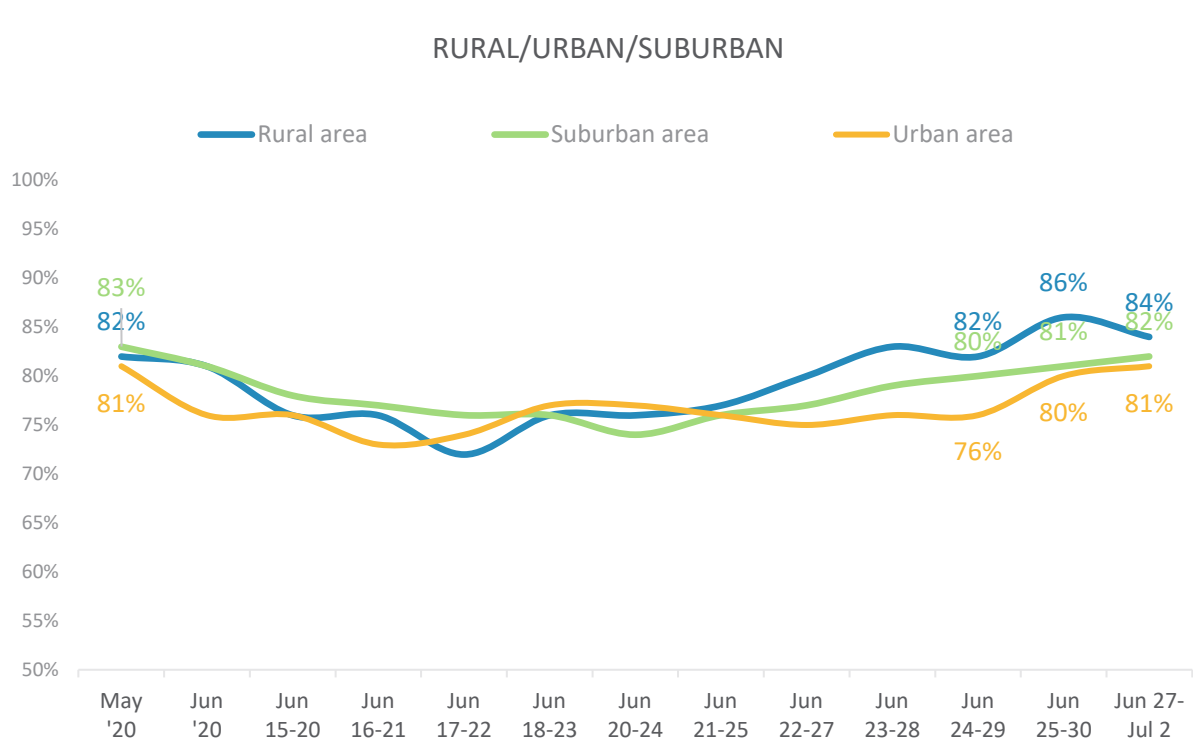


These graphs are based on 5 day roll in order to boost the sample sizes.

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

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

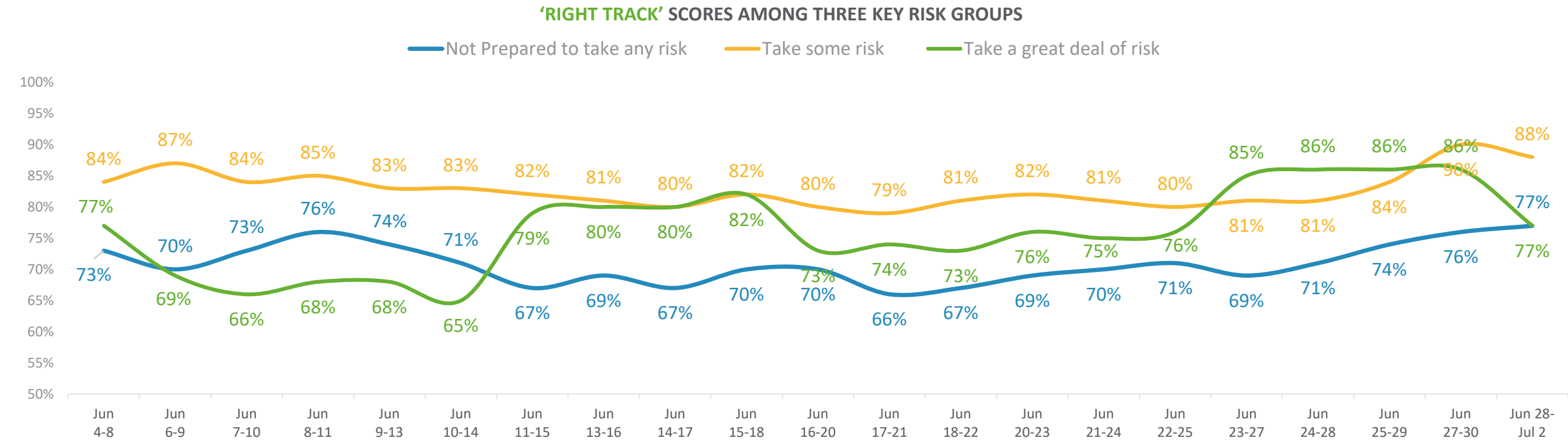
Right Track Scores – 5-Day Roll



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

Over the past week, the prevailing trend is the ‘right track’ scores for all ‘risk’ groups are, in general, trending stronger. Over the past two waves, the ‘right track’ scores for those who wish to take ‘some risk’ reached its highest point.



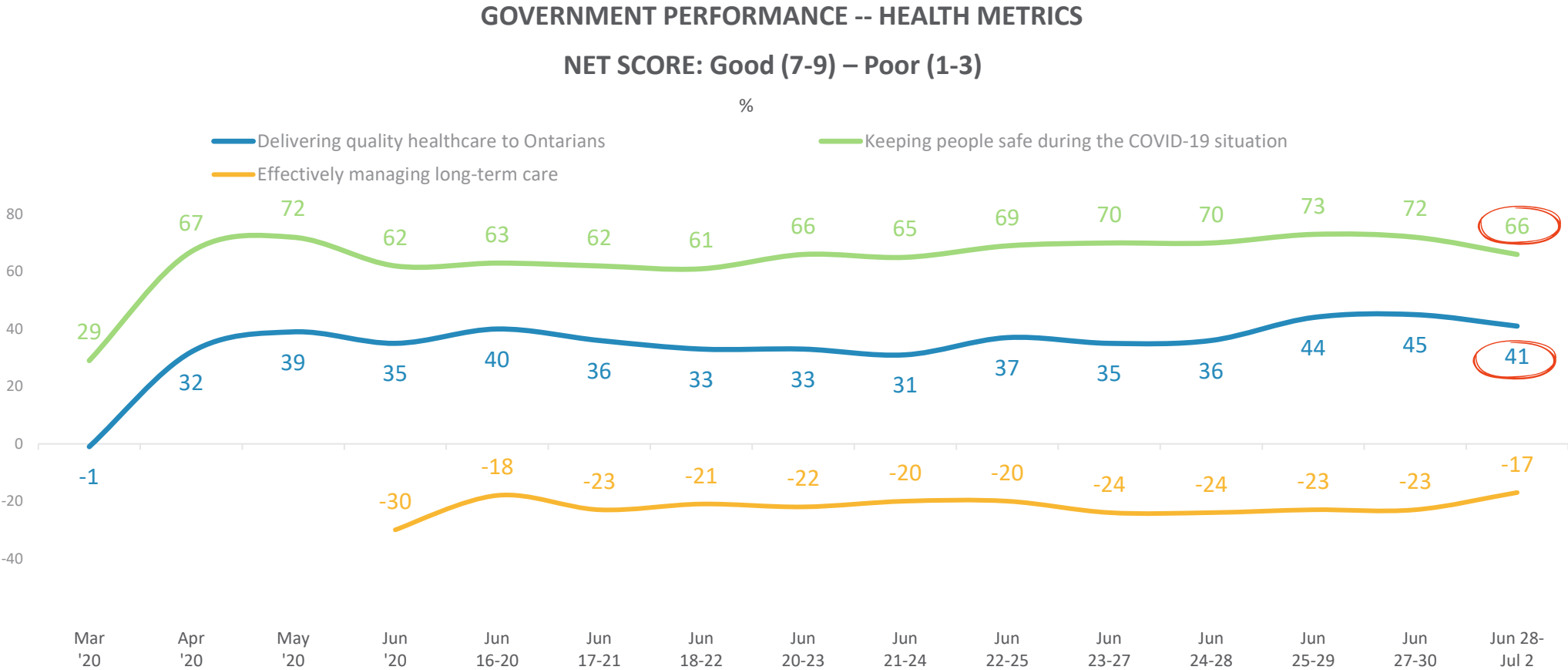
Q2. Overall, do you feel that the Ontario provincial government is on the right track or the wrong track, in terms of how it is governing the province? Base: Total sample

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

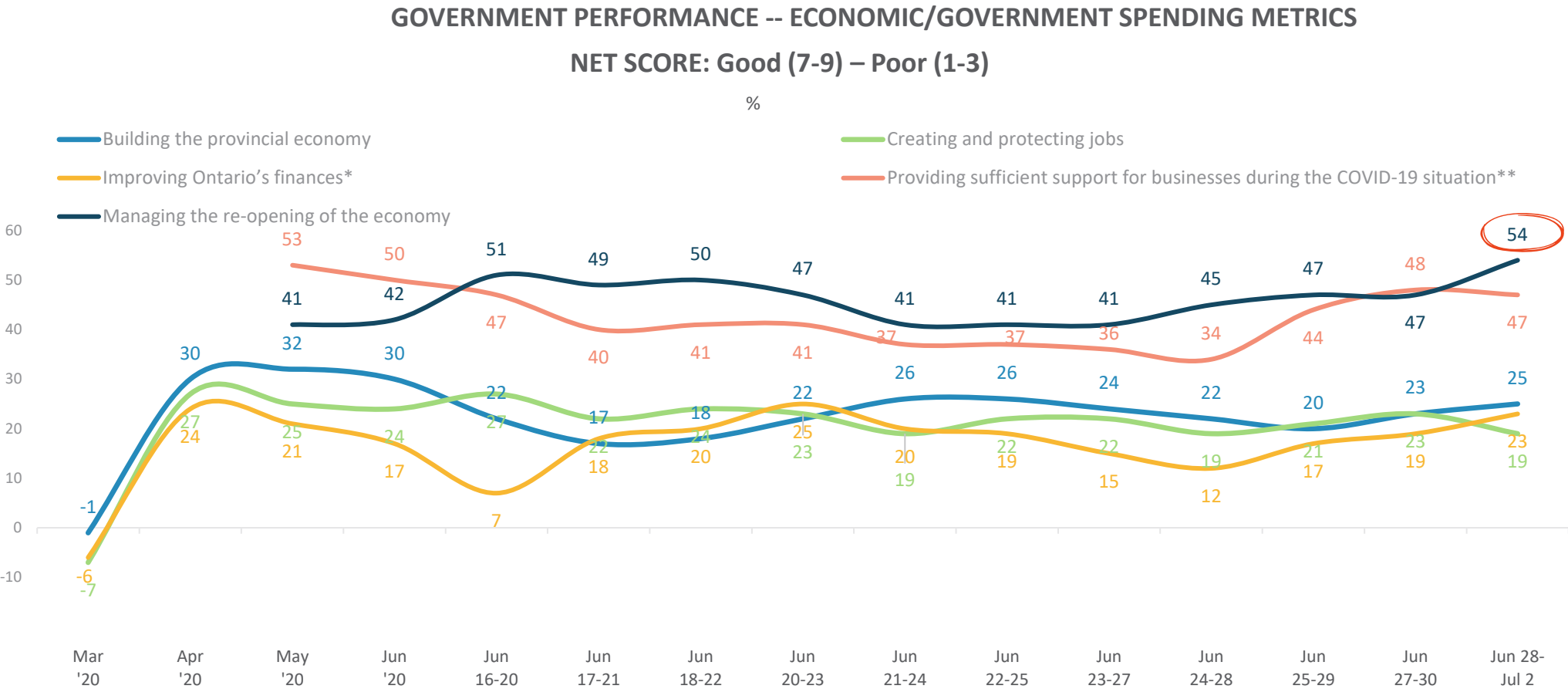


The latest wave indicates that perceptions toward the government’s performance on the key health metrics ‘delivering quality healthcare to Ontarians’ and ‘keeping people safe during the COVID-19 situation’ slipped slightly.



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

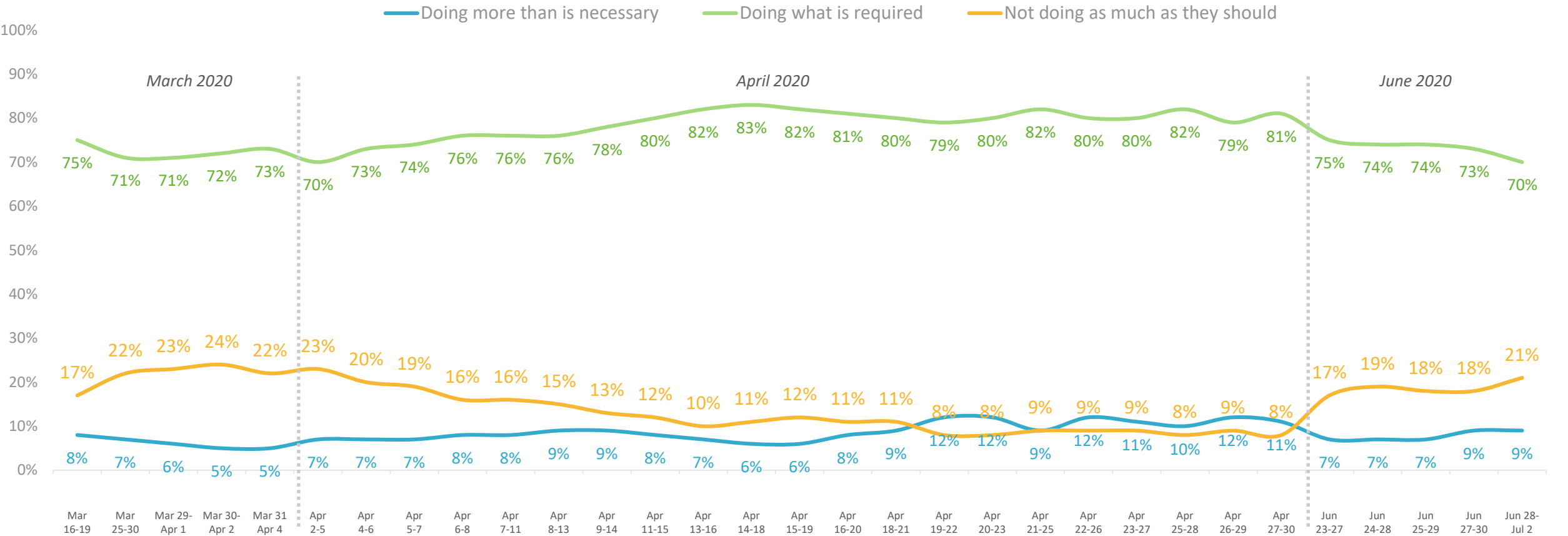
The government continues to be perceived as performing strongest on ‘managing the re-opening’ and its score peaked at its highest point in the latest wave.



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

Most Ontarians continue to feel the government is ‘doing what is required’ on an overall basis, however about 1-in-5 say that the government is ‘not doing as much as they should’.



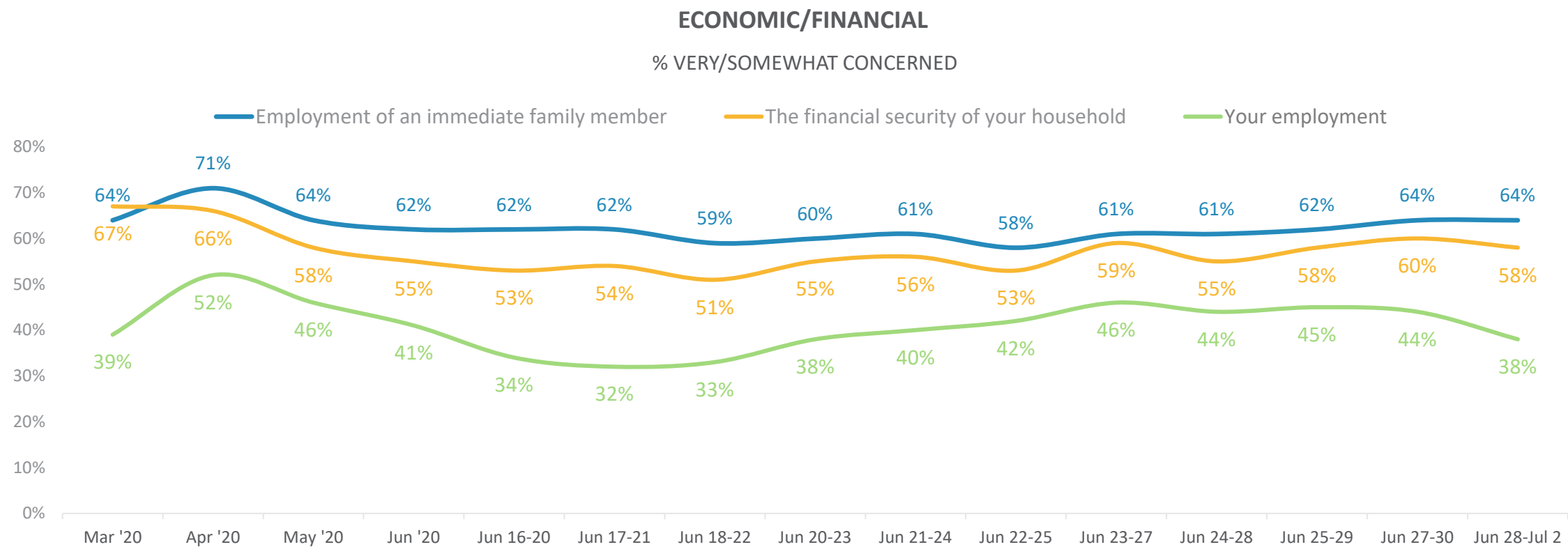
QCV-6. Thinking about the measures that the Government of Ontario has already taken to limit the spread of the virus, including advising the public and businesses about prevention measures, gradually reopening the province, and planning for the return to school in the fall, at this time would you say they are ...
(previous phrasing) Thinking about the measures that the Government of Ontario has already taken to limit the spread of the virus, including issuing a Declaration of Emergency, ordering non-essential businesses to close, advising the public and businesses about prevention measures and closing publicly funded schools, at this time would you say they are ... (READ LIST. RANDOMIZE ACCEPT ONE RESPONSE ONLY.) (previous phrasing) Thinking about the measures that the Government of Ontario has already taken to limit the spread of the virus, including advising the public and businesses about prevention measures and closing publicly funded schools, at this time would you say they are ...

Base: Total sample, base varies

CONCERNS ABOUT IMPACT OF COVID-19



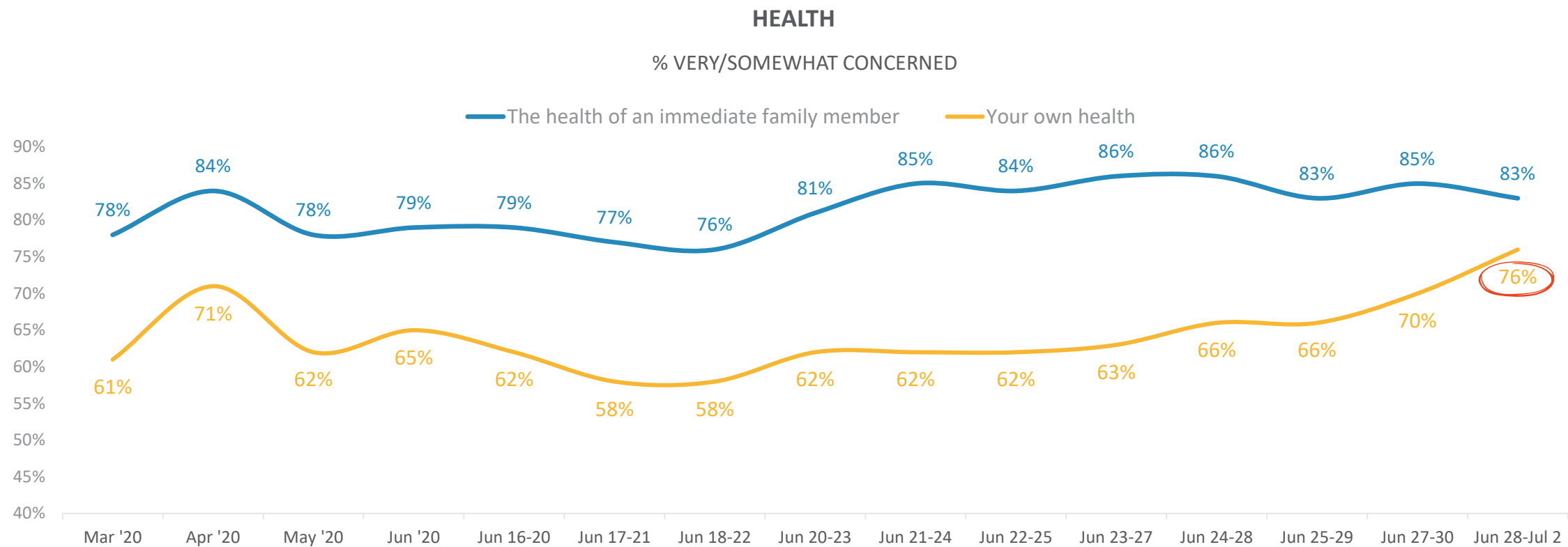
Anxiety of Ontarians about employment and financial security continues to remain deep, although there is slightly less concern in recent waves with regard to their own employment.



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

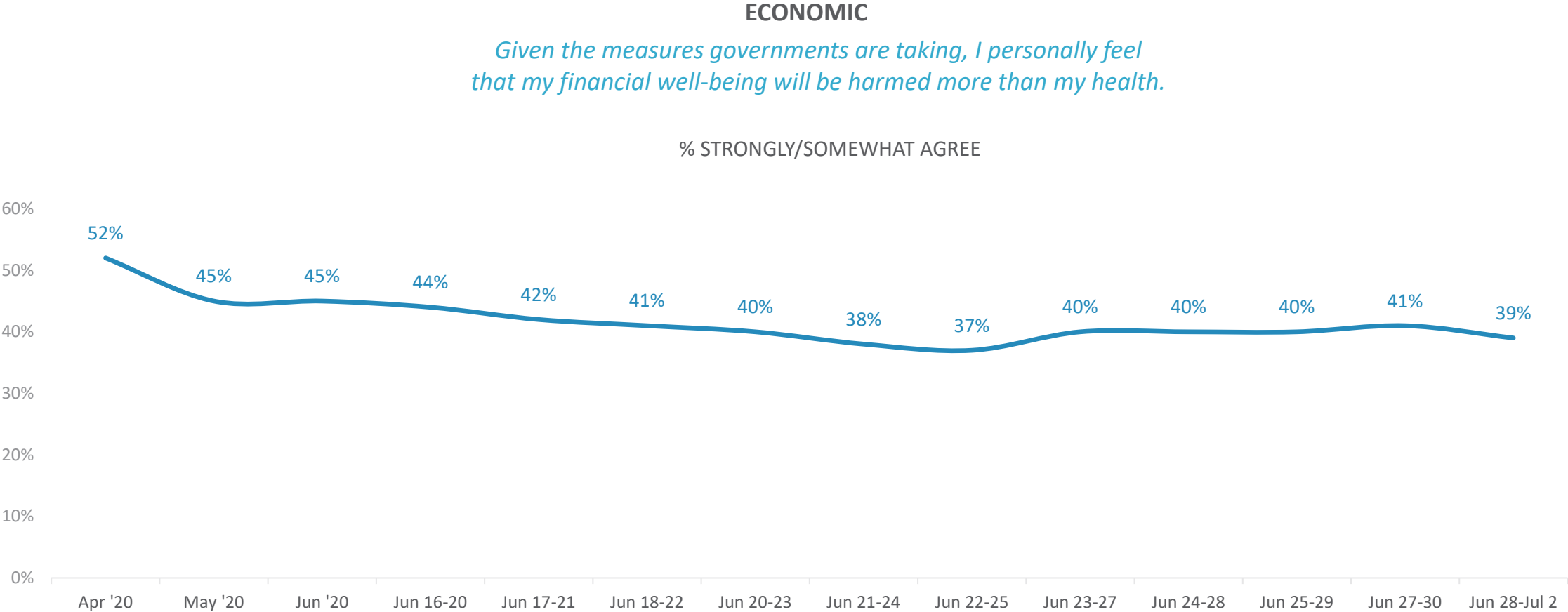
Concern of Ontarians about their personal health increased 10-points over the past three waves and increased 18-points since mid-June.



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 continue to be 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

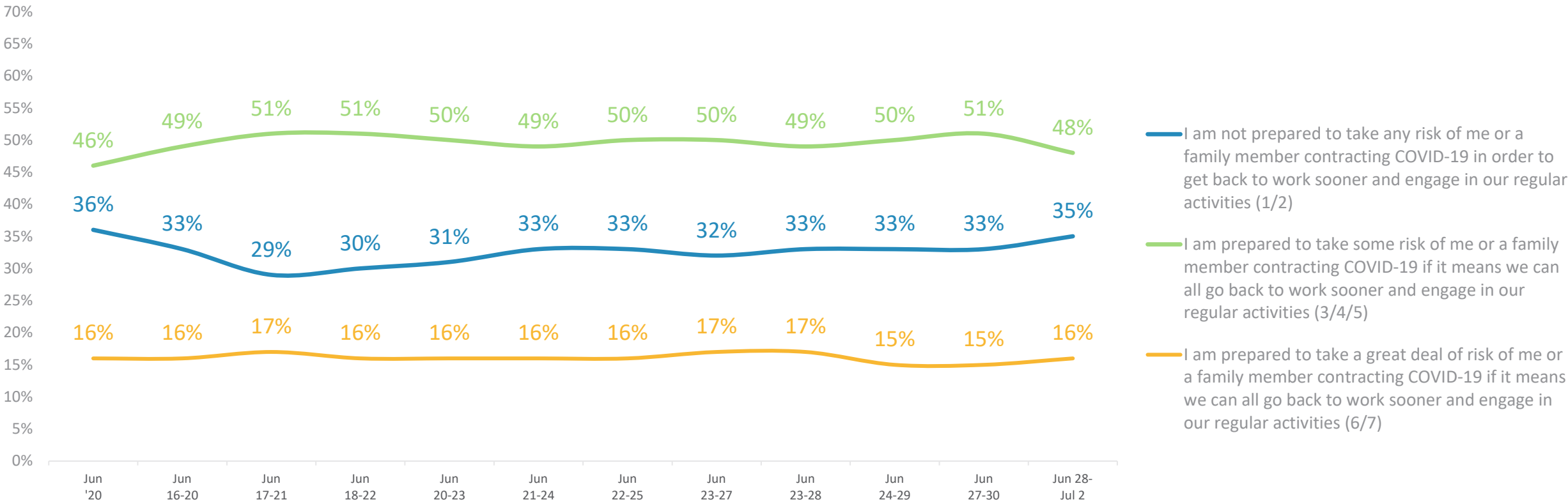
COVID-19 RISK TOLERANCE



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 64% 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 35-44, and those earning >\$100k.

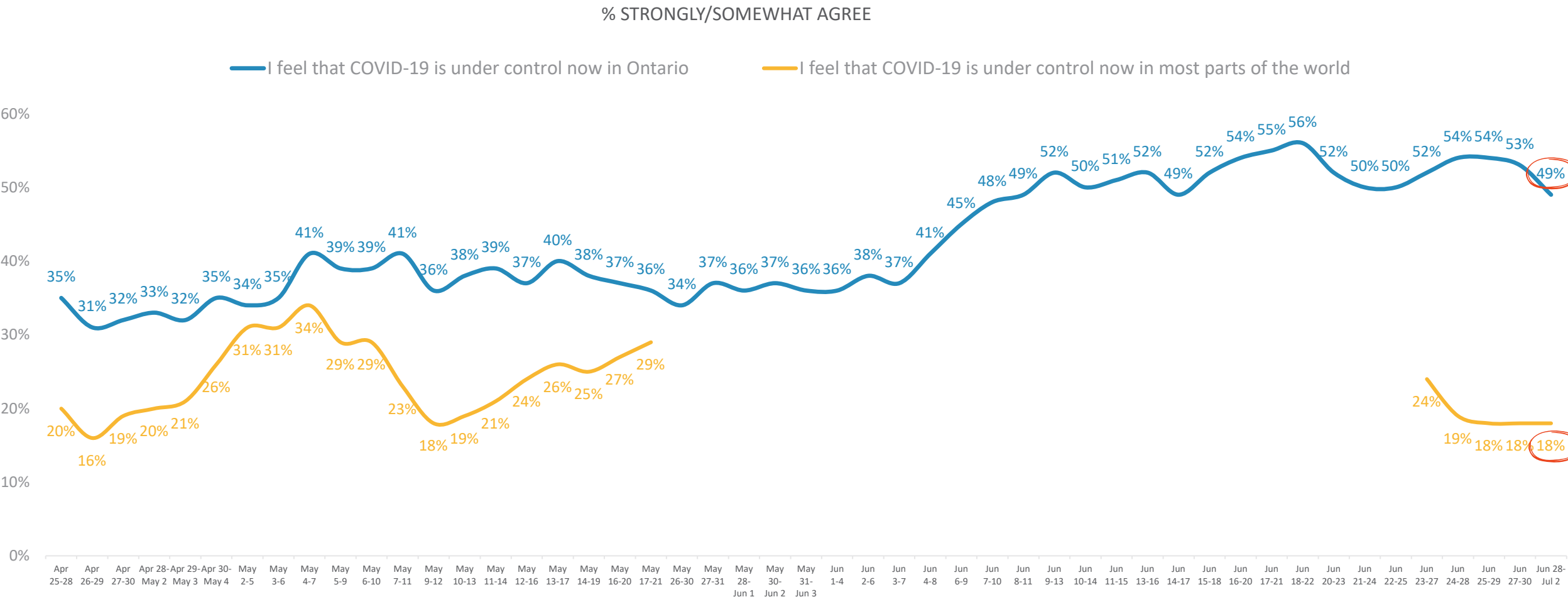


QCV-73. Where would you place yourself on the following scale about the risk of contracting COVID – 19 and opening up the economy more quickly?
Base: Total sample (“Engage in our regular activities” added to statements June 11)

PERCEPTIONS ABOUT WHETHER COVID-19 IS UNDER CONTROL

About 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.

- Men, those aged 55-64, Toronto suburban residents, those who think the government is on the ‘right track’, those born outside Canada, and those with children under the age of 18 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 72% 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 residents, those aged 35-44, and Central 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: suburban residents, those earning >\$40k, those with no children at home, those aged 45-54, and those who see the government on the 'wrong 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	June 27-30	June 28-July 2
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	60	58
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	73	72
COVID-19 is no longer a significant public health risk	12	13	13	14	14	13	15	15	14	11	10	9	8	9	8	8
I see people everyday not following the social distancing guidelines	72	75	75	76	78	79	81	81	83	82	79	78	77	78	77	77

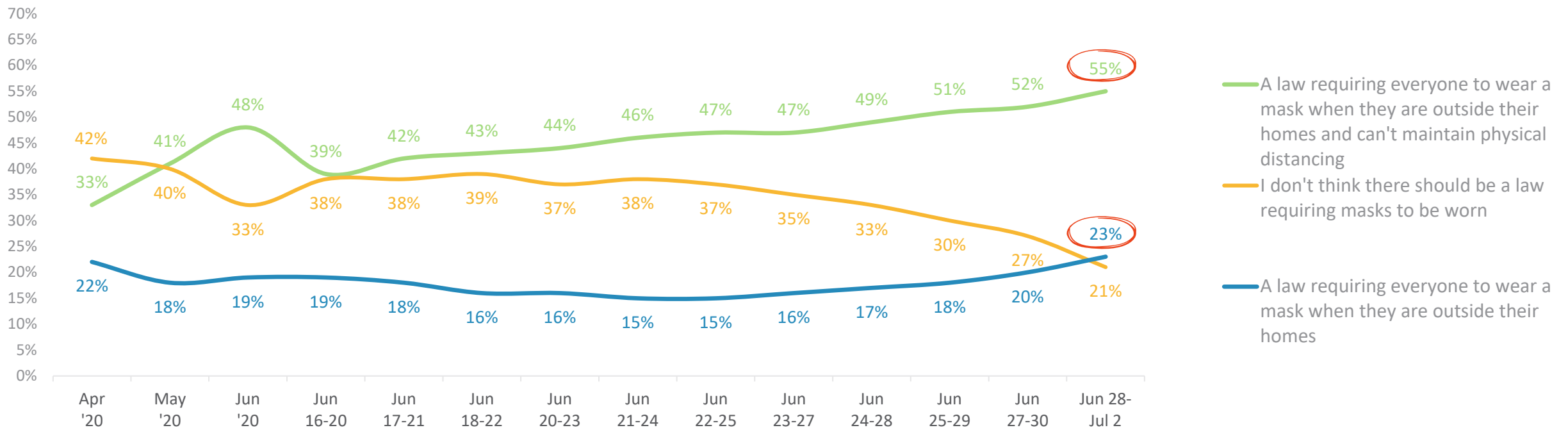
MASK WEARING PERCEPTIONS



MAKING THE WEARING OF A MASK A LEGAL REQUIREMENT

Ontarians have shifted significantly toward some level of legal codification of face mask wearing: two weeks ago, 58% wanted some legal codification. Now, this percentage has risen to 78%. In contrast, a declining number of Ontarians do not want a law requiring everyone to wear a mask.

- Nine days ago, 39% did not want any law on face masks; this number has dropped to 21% in the latest wave.
- Men, those earning <\$40k, those aged 55-64, rural residents, those born in 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, those born outside Canada, 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 35% 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 65+, those earning <\$40k, rural/urban 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	June 27-30	June 28-July 2
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	27	24
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	87	86
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	38	35

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

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 about only 16% say they ‘rarely’ or ‘never’ wear a mask.

- Women, those aged 55-64, those earning <\$100k, GTHA residents, suburban/urban residents, and those born outside Canada 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	June 27-30	June 28-July 2
n=	313	400	400	410	410	410	410	410	410
	%	%	%	%	%	%	%	%	%
TOTAL ALL/MOST OF THE TIME	52	52	52	52	54	55	58	58	60
All of the time	26	27	27	23	25	25	25	29	29
Most of the time	26	25	26	29	29	31	33	29	32
Some of the time	26	26	28	28	26	25	24	26	24
Rarely	19	18	15	17	17	16	15	12	13
Never	4	3	4	3	3	4	3	3	3
RARELY/NEVER	23	21	20	20	20	20	18	15	16

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

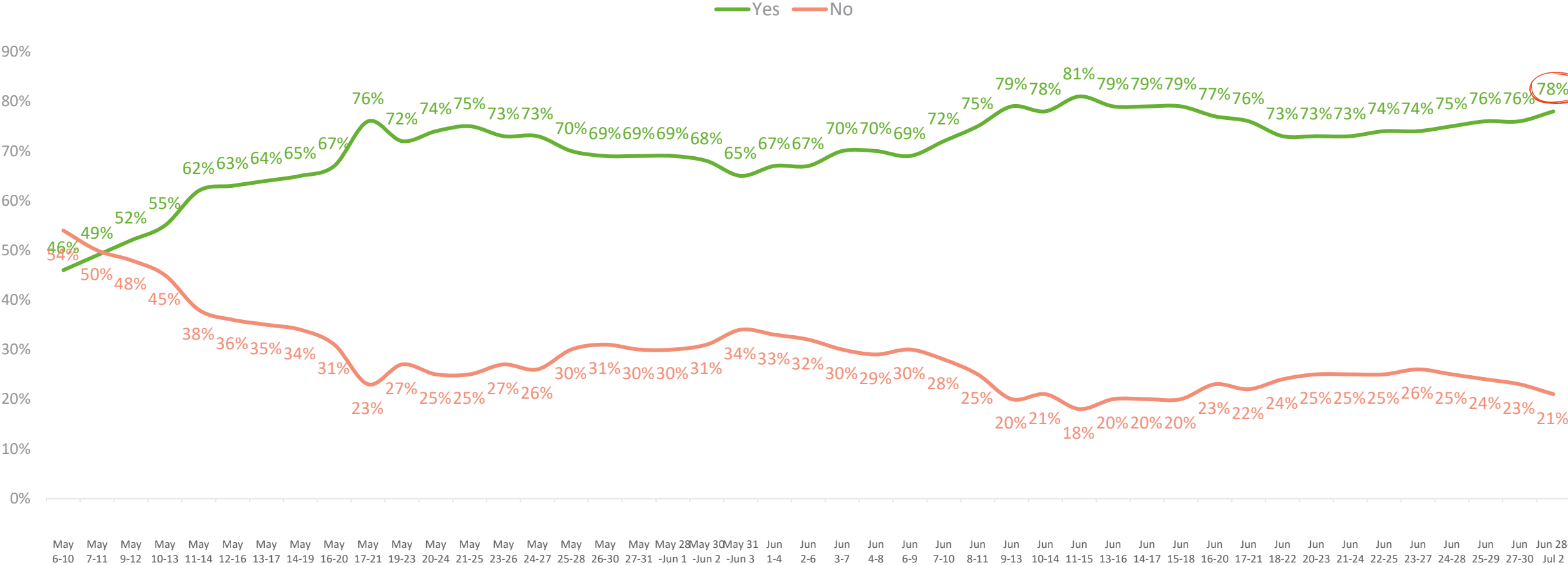
GUIDELINES FOR OPENING BUSINESSES



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 78%.

- Women, those earning >\$40k, and those aged 65+ are the most aware of these guidelines.

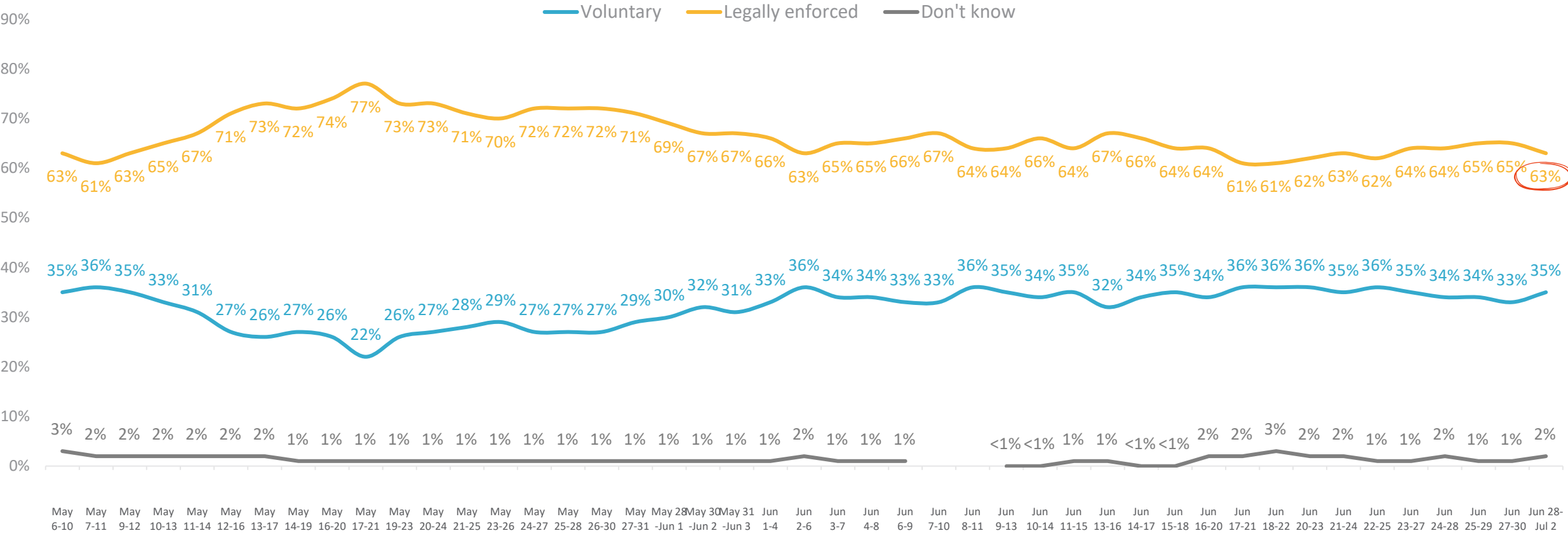


QCV-52. As part of the process of re-opening of the economy, the province has announced guidelines to help ensure the re-opening of businesses occurs without increasing COVID-19 infections. Are you aware of these guidelines?

Base: Bases vary

Support for provincial guidelines to be legally enforced remains strong.

- Those who are mostly likely to want these guidelines to be codified are: women, those aged 65+, and urban/suburban residents.



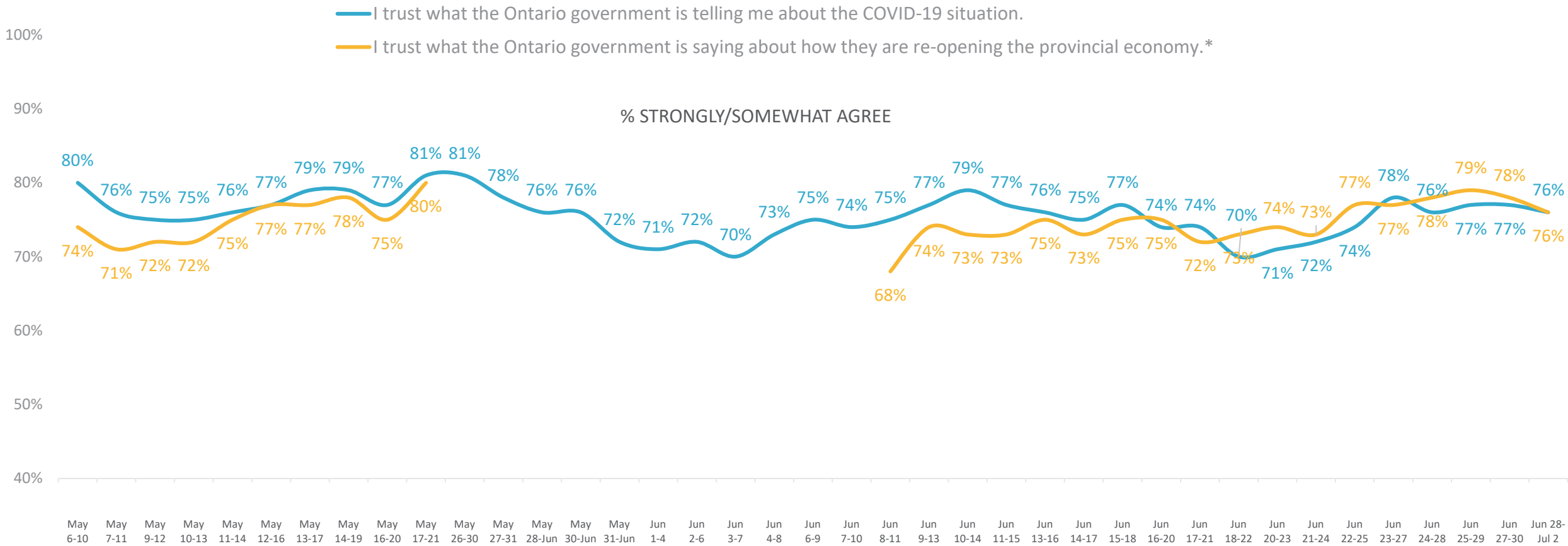
QCV-54. The guidelines for re-opening include requirements for physical distancing, frequent handwashing and sanitizing of surfaces, staggered shifts, installing physical barriers, and contactless payment options Do you believe that these guidelines should remain voluntary or should they be legally enforced? (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, June 27-30 n=410, June 28-July 2 n=410)

CONFIDENCE IN GOVERNMENT COVID-19 MESSAGING



Ontarians continue to trust the government’s messaging about the economic re-opening and general COVID-19 situation.



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 71% 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 born in Canada 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	June 27-30	June 28-July 2
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	48	49
I feel that I have enough information about COVID-19	70	70	69	69	69	68	68	67	67	69	70	71	72	72	73	71
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	22	20

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: 69% are ‘strongly’ opposed to this idea.

- Men, those aged 35-44, those earning <\$40k, rural/urban 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	June 27-30	June 28-July 2
n=	294	410	410
	%	%	%
TOTAL SUPPORT	16	17	14
Strongly support	5	7	7
Somewhat support	10	10	7
Neither support nor oppose	3	3	3
Somewhat oppose	13	13	13
Strongly oppose	66	66	69
TOTAL OPPOSE	79	78	82
Don't know/not sure	2	2	1

QCV-100B2. To what extent do you support or oppose the opening up of the Canadian border to non-essential US visitors?

Base: Total sample

BUYING GOODS AND SERVICES
LOCALLY



Not surprisingly, two-thirds of Ontarians support buying food and goods locally and from Ontario-owned retailers. There is a significant decline in likelihood to buy if Ontario products cost 20% more.

How important is it to you personally that you ... % Very Important	June 28- July 2
... buy food produced in Ontario	70%
... buy goods produced in Ontario	64%
... 'Shop local'	68%
... Buy goods and services from Ontario-owned retailers	66%

How likely would you be to buy an Ontario-produced product if it cost ... % Very Likely	June 28- July 2
... 5% more than a similar, non-Ontario produced one?	47%
... 10% more than a similar, non-Ontario produced one?	53%
... 20% more than a similar, non-Ontario produced one?	28%

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