

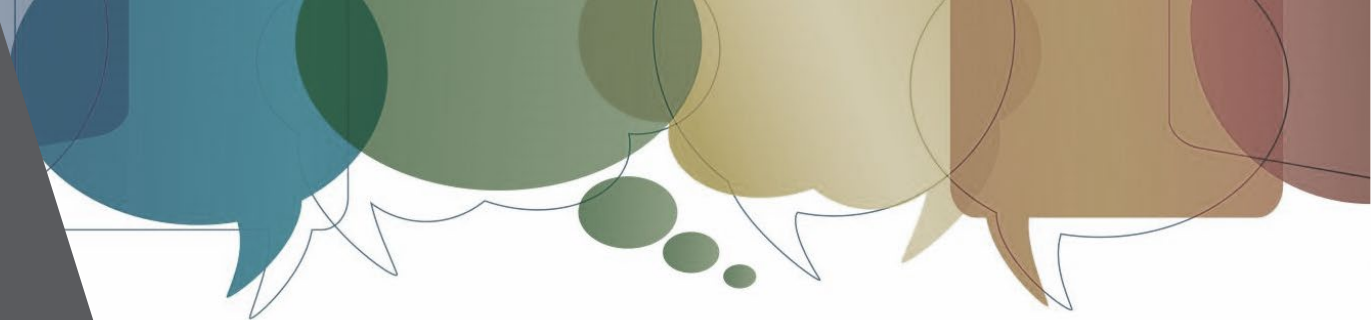


THE
**STRATEGIC
COUNSEL** 25

TORONTO | OTTAWA | CALGARY

www.thestrategiccounsel.com

EXPERIENCE • PASSION • CREATIVITY
CUSTOM SOLUTIONS FOR COMPLEX ISSUES



JULY 2020 RESEARCH

PULSE REPORT ON COVID-19 – REPORT #39

CABINET OFFICE

July 17th 2020



KEY FINDINGS

Key Findings

1 The government's 'right track' scores have stabilized at 81% over the past week.

'Right track' scores have improved across most regions (except for Northern Ontario) and most age groups (except for those aged 45-54).

4 At the same time, Ontarians continue to give strong positive scores to the government regarding 'keeping people safe during the COVID-19 situation' and 'delivering quality healthcare'.

2 Perceptions of the government's performance on 'managing the re-opening of the economy' spiked upward to 67% from 48% (a 19-point increase). Much of this increase occurred after the government's announcement that much of the province would move into Phase 3.

5 Ontarians' concern about their financial security has been easing – from 60% in late June to 47% in mid-July. However, concern with regard to their employment has moved upward.

Moreover, concern of Ontarians about their personal health and health of immediate family members has generally eased slightly over the past two weeks.

3 This positive view of the government's performance stems from the fact Ontarians are strongly aligned with the government's management of the re-opening: Virtually all Ontarians think the government's gradual and careful reopening has been the right approach compared to the process in the United States. The level of intensity has increased slightly from 72% to 77% 'strongly' agree.

6 As most of the province moves into Phase 3, views about the amount of risk people wish to take has also shifted. There has been spike (up to 40%) in the proportion who 'do not wish to take any risk', while those who wish to take at least 'some risk' has dropped from 80% to 58%.

Key Findings

7 Responding to the media focus, there has been a significant shift in Ontarians' behaviour in wearing a mask over the past week. Now 72% (up from 60%) claim they are wearing a face mask 'all of the time' or 'most of the time' when away from home.

8 About 71% say they are aware of the issue of COVID-19 illnesses among farm workers in South West Ontario.

Ontarians are divided on the management of the COVID-19 health issues among farm workers in South West Ontario. About 40% say the government managed it well, but 48% believe it was managed poorly.

Most Ontarians say they are concerned about the issue with 44% saying they are 'very' concerned.

9 Not surprisingly, 'COVID-19' continues to dwarf all issues in terms of what Ontarians want from their government. It is worth noting that crime and seniors' issues are starting to be mentioned as top issues.

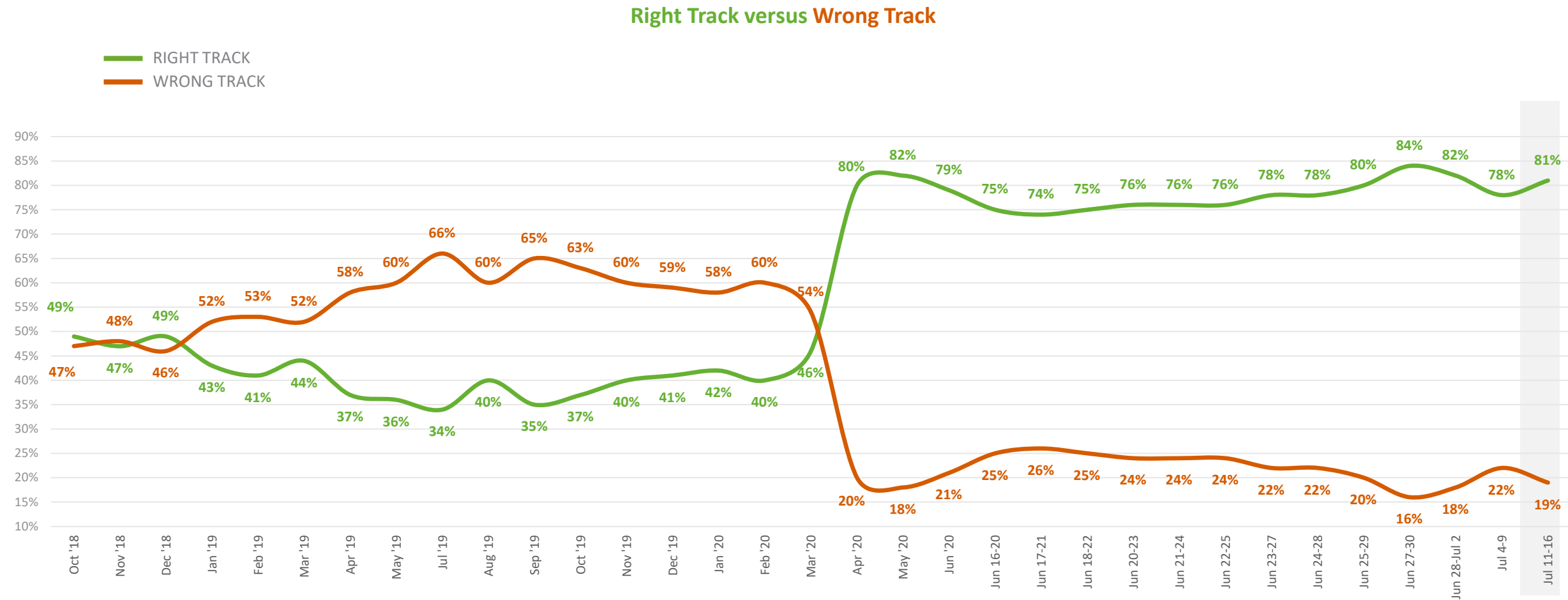
10 Not surprisingly, Ontarians are pre-disposed to purchase Ontario-made products. One-third even claim they are willing to purchase Ontario-made products priced 20% above non-Ontario made products. We know from other research that this pre-disposition does not translate into actual buying behaviour.

However, when Ontarians understand the economic benefits (i.e. jobs) associated with buying Ontario-made products, they are even more pre-disposed to purchase Ontario-made products. In other words, if Ontarians understand the context of buying Ontario-made products, we may see some boost in Ontario consumers buying Ontario-made products and services.

RIGHT TRACK
WRONG TRACK



Over the past week, the government’s ‘right track’ scores have stabilized at 81% over the past week.

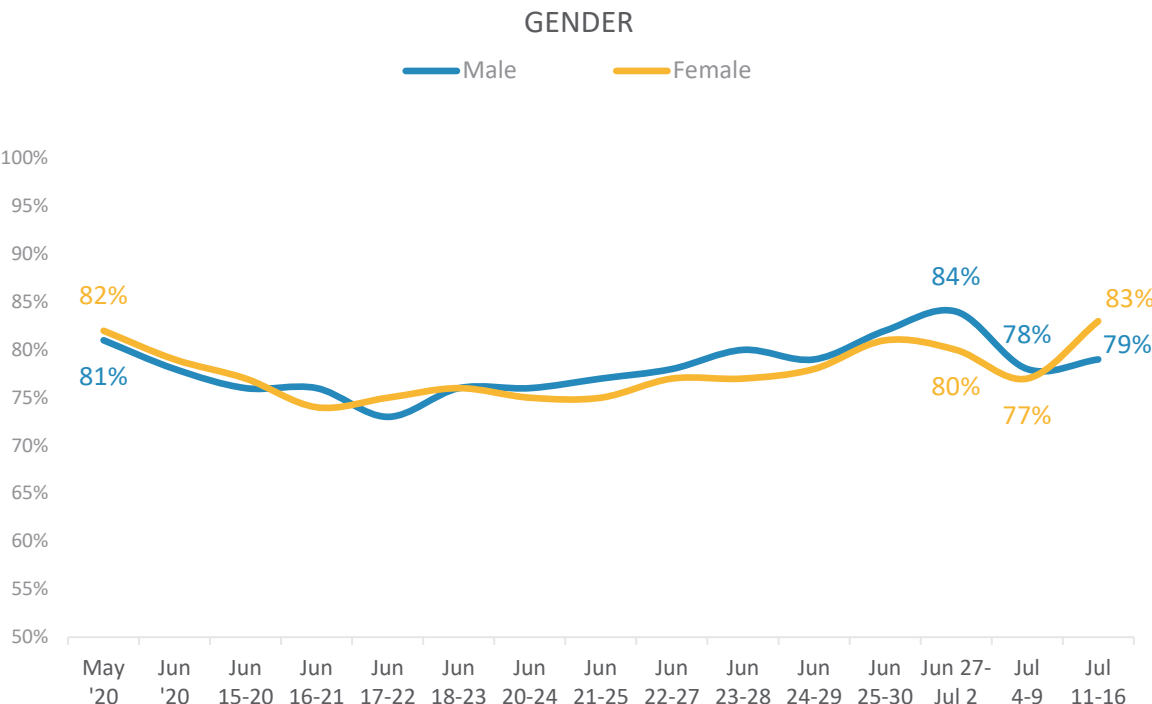
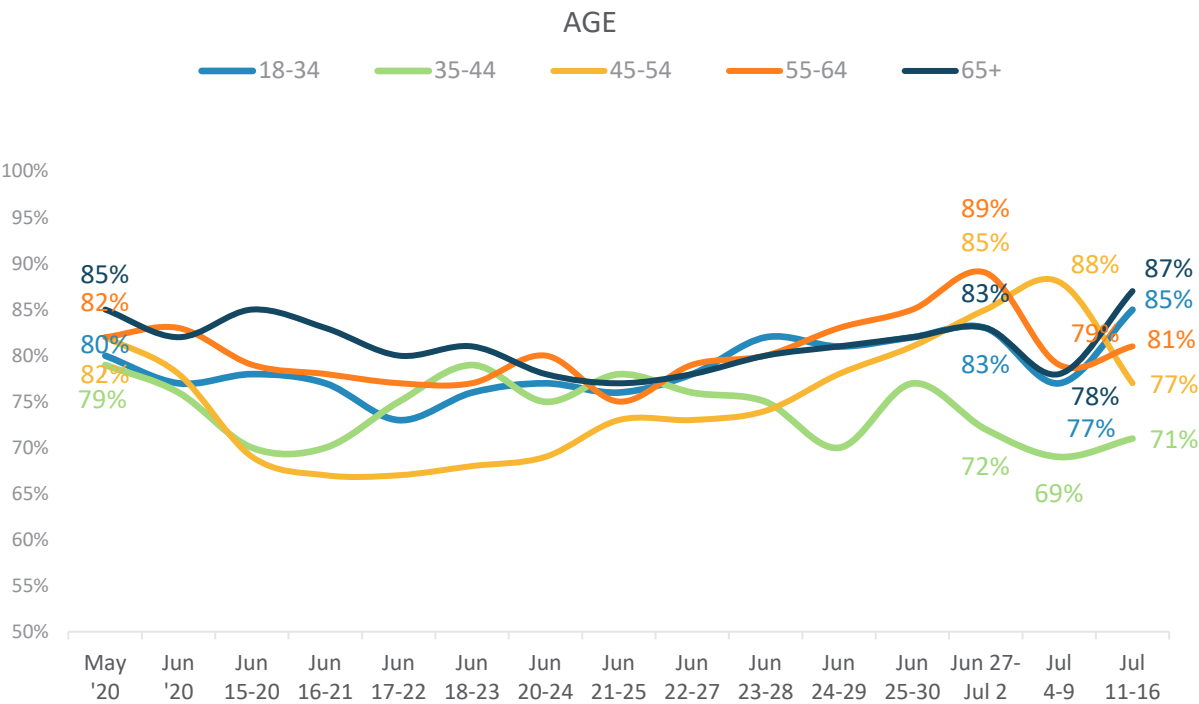


These graphs are based on 4 day roll in order to boost the sample sizes.

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 age groups except for those aged 45-54.

Right Track Scores – 6-Day Roll

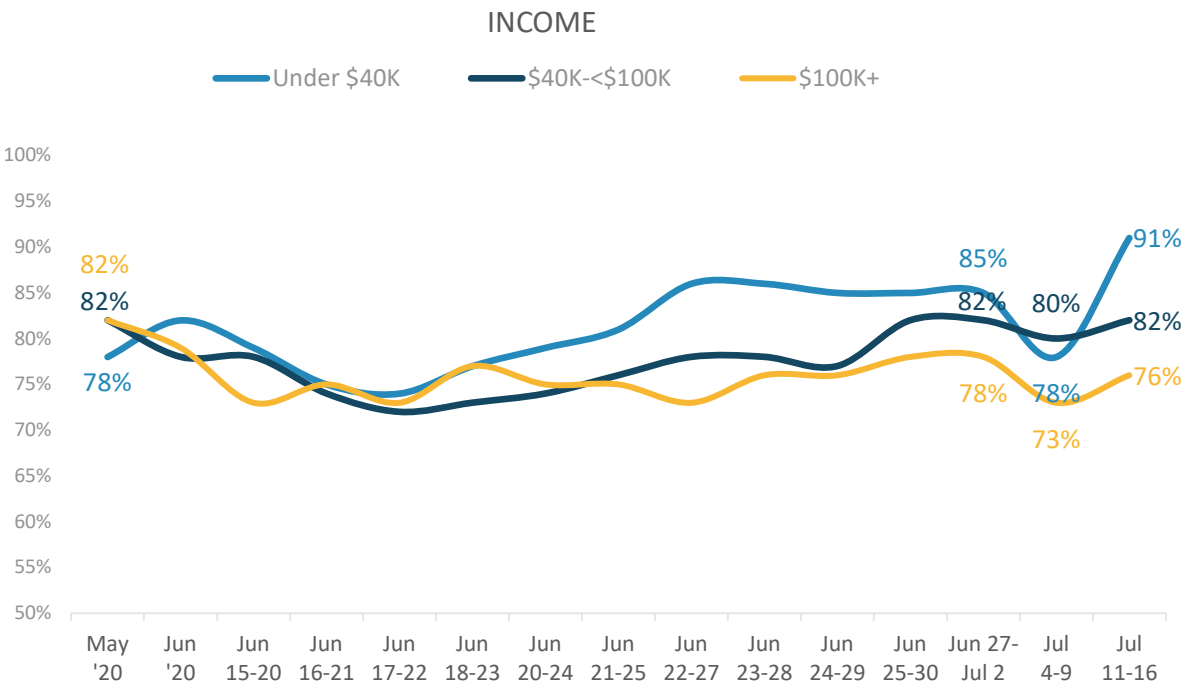
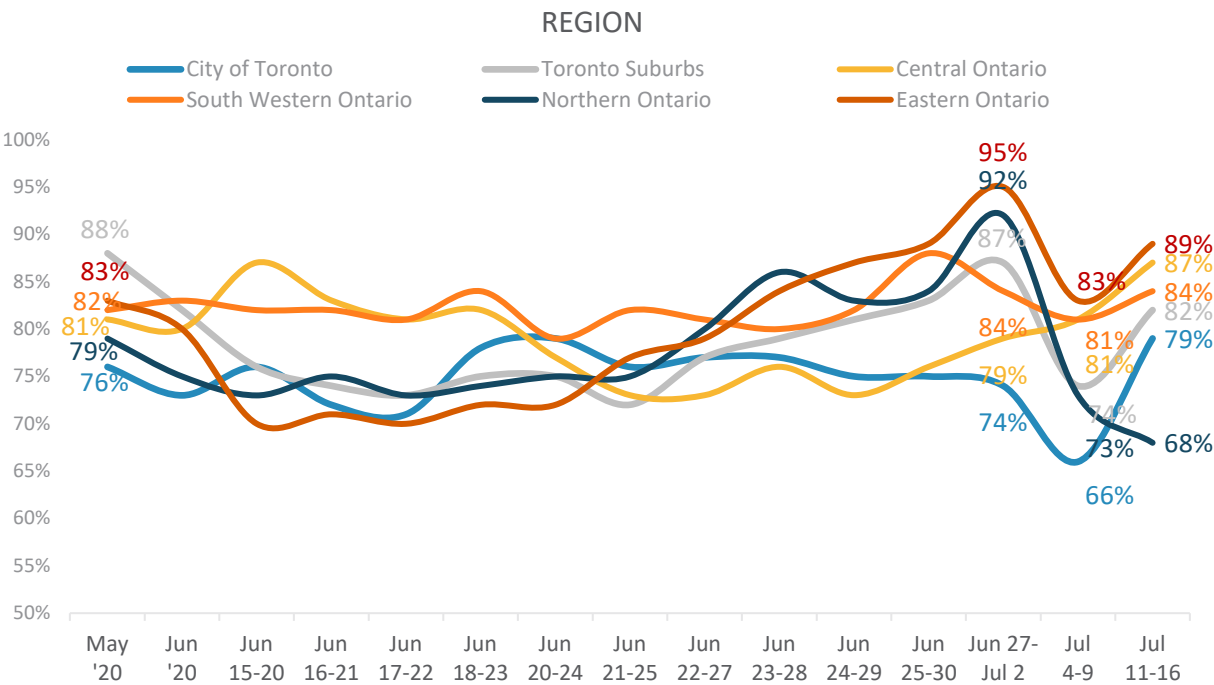


These graphs are based on 5 day roll in order to boost the sample sizes.

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 across most regions except for Northern Ontario. ‘Right track’ scores are weaker among those earning >\$100k, but much stronger among those earning <\$40k.

Right Track Scores – 6-Day Roll

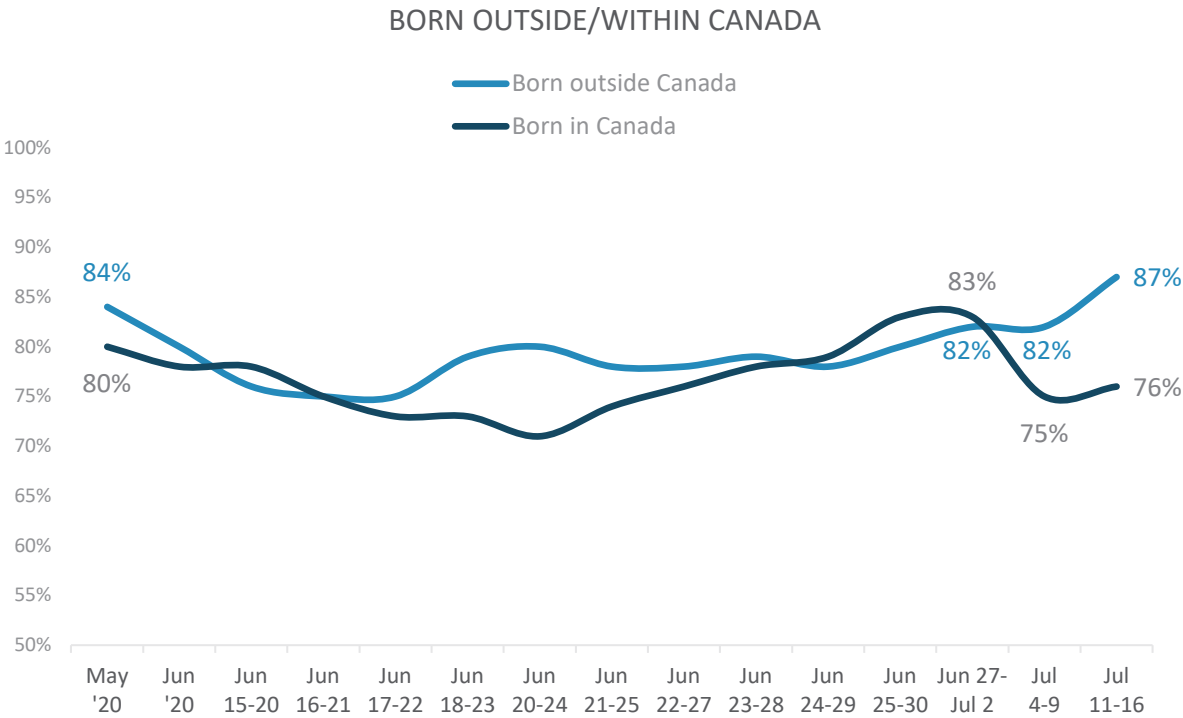
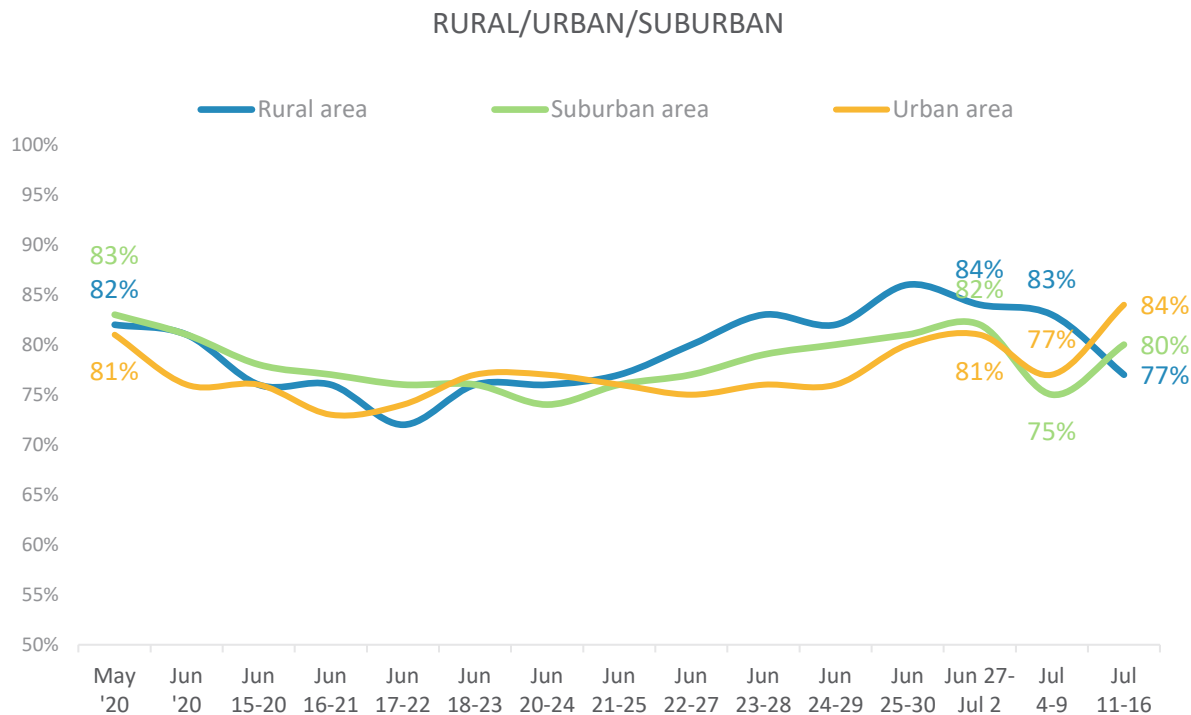


These graphs are based on 5 day roll in order to boost the sample sizes.

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

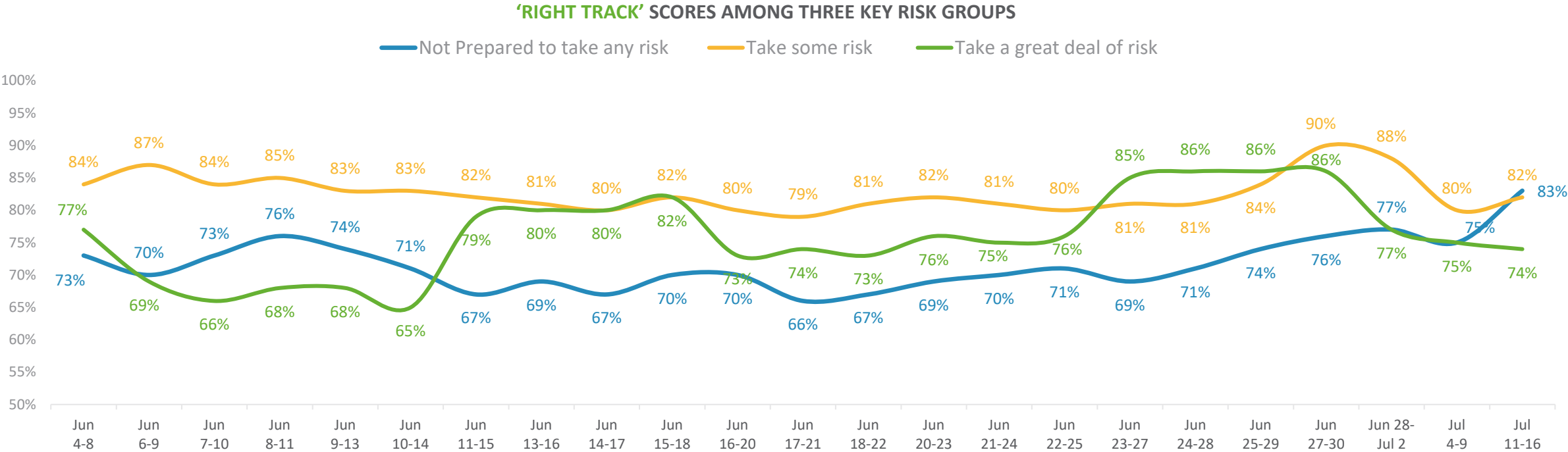
Over the past week, ‘right track’ scores are weaker among rural residents, while stronger with suburban/urban residents. These scores are also weaker among those born in Canada.

Right Track Scores – 6-Day Roll



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

Over the past week, ‘right track’ scores for those wanting to ‘take a great deal of risk’ have softened, while the scores for ‘not prepared to take any risk’ have increased.



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

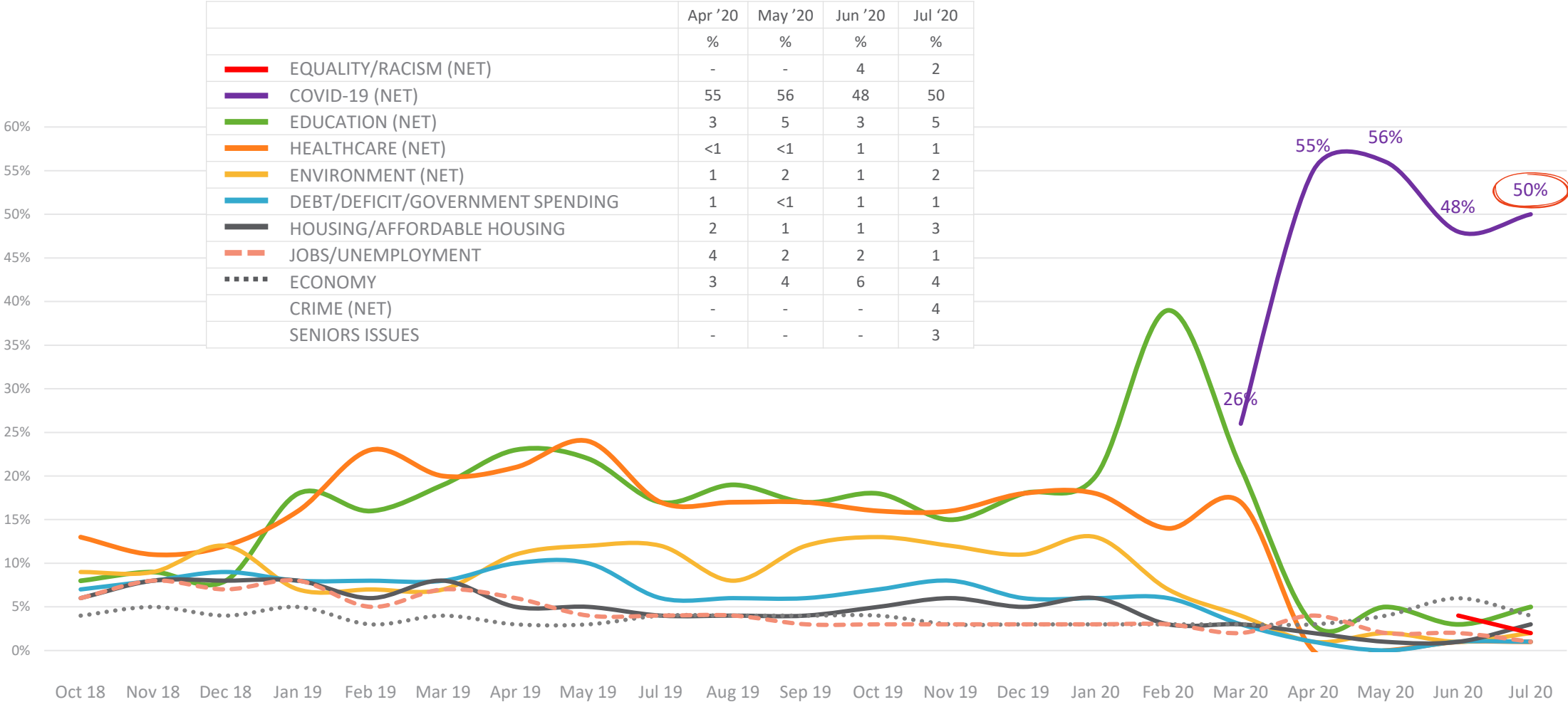
QCV-73. Where would you place yourself on the following scale about the risk of contracting COVID – 19 and opening up the economy more quickly?: I am not prepared to take any risk of me or a family member contracting COVID-19 in order to get back to work sooner and engage in our regular activities (1/2); 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)

TOP ONTARIO GOVERNMENT PRIORITIES



TOP ISSUES REQUIRING ATTENTION FROM THE GOVERNMENT

Not surprisingly, ‘COVID-19’ continues to dwarf all issues in terms of what Ontarians wants from their government. It is worth noting that crime and senior issues are starting to be mentioned as top issues.



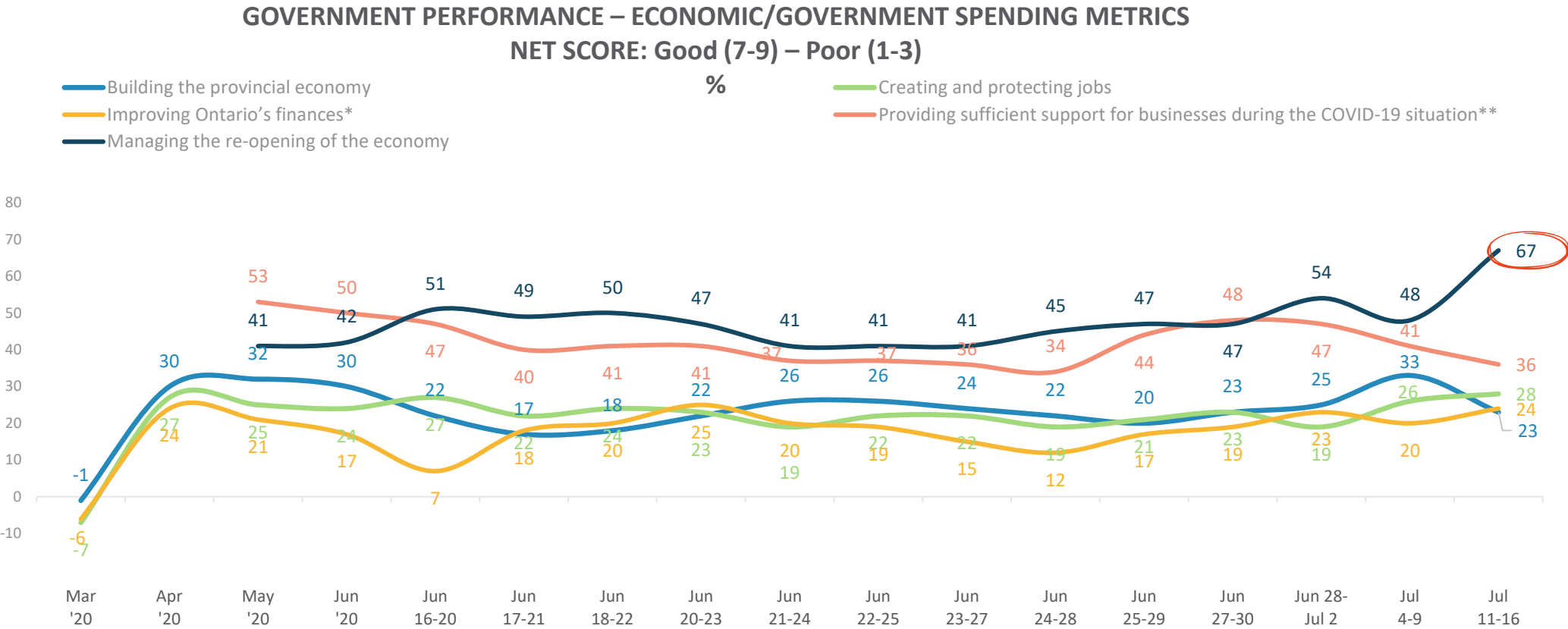
Q1. Thinking about the issues presently facing Ontario, which ONE do you feel should receive the GREATEST attention from the Ontario provincial government? That is, what should be the top priority?

PERCEPTIONS OF GOVERNMENT PERFORMANCE DURING COVID-19 PANDEMIC



Perceptions of the government’s performance on ‘managing the re-opening of the economy’ spiked upward to 67%, a 19-point increase. Much of this increase occurred after the government’s announcement that much of the province would move into Phase 3.

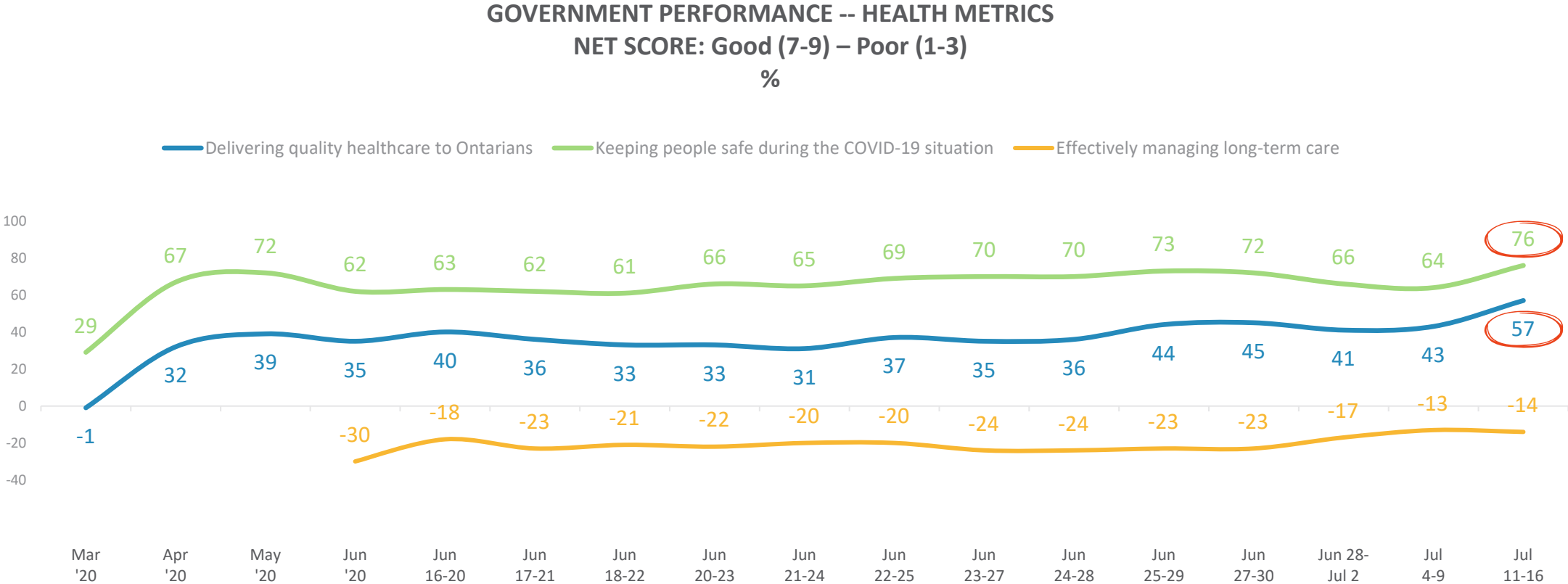
- ‘Managing the re-opening of the economy’ peaked at 70% in the Monday-Thursday interviewing.



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

Moreover, Ontarians continue to give strong positive scores to the government regarding ‘keeping people safe during the COVID-19 situation’ and ‘delivering quality healthcare’.



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

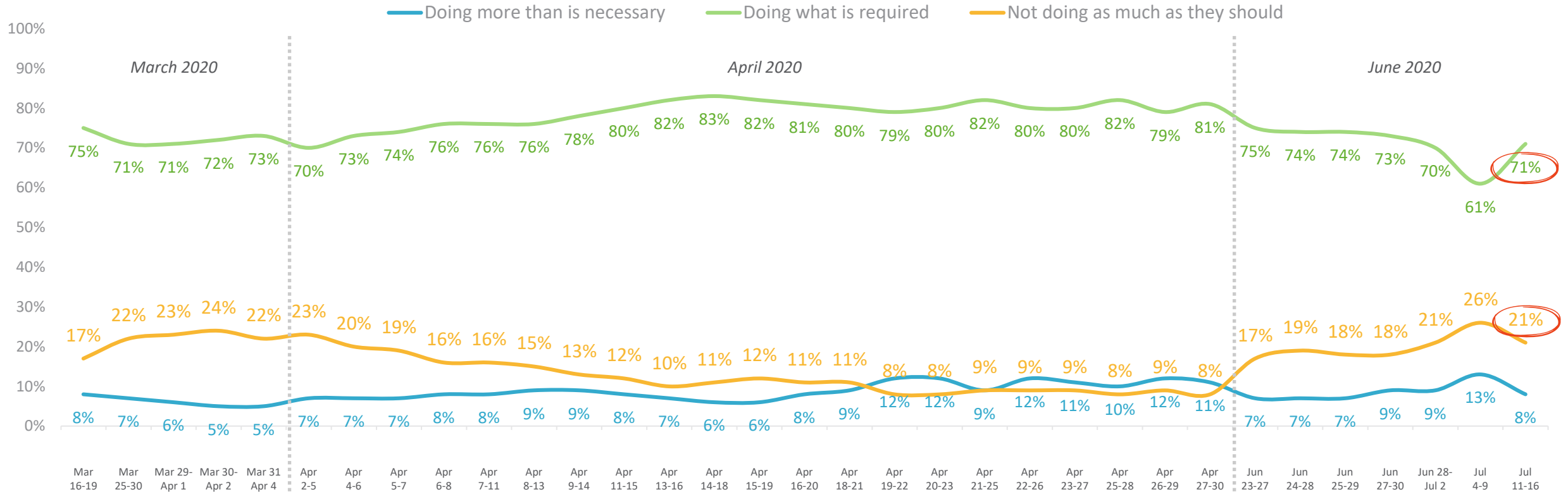
Virtually all Ontarians continue to think the government’s gradual and careful reopening has been the right approach compared to the process in the United States. The level of intensity has edged upward: from 72% to 77% ‘strongly’ agree.

Ontario’s gradual and careful re-opening has been the right approach compared to the more rapid opening process in the United States.

	Jul 4-9	Jul 11-16
n=	300	300
	%	%
TOTAL AGREE	91	94
Strongly agree	72	77
Somewhat agree	19	17
Neither agree nor disagree	2	1
Somewhat disagree	3	2
Strongly disagree	3	2
TOTAL DISAGREE	6	4
Don't know	2	1

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

Over the past week, an increased proportion (from 61% to 71%) of Ontarians feel the government is ‘doing what is required’. Now, only 1-in-5 say that the government is ‘not doing as much as they should’.



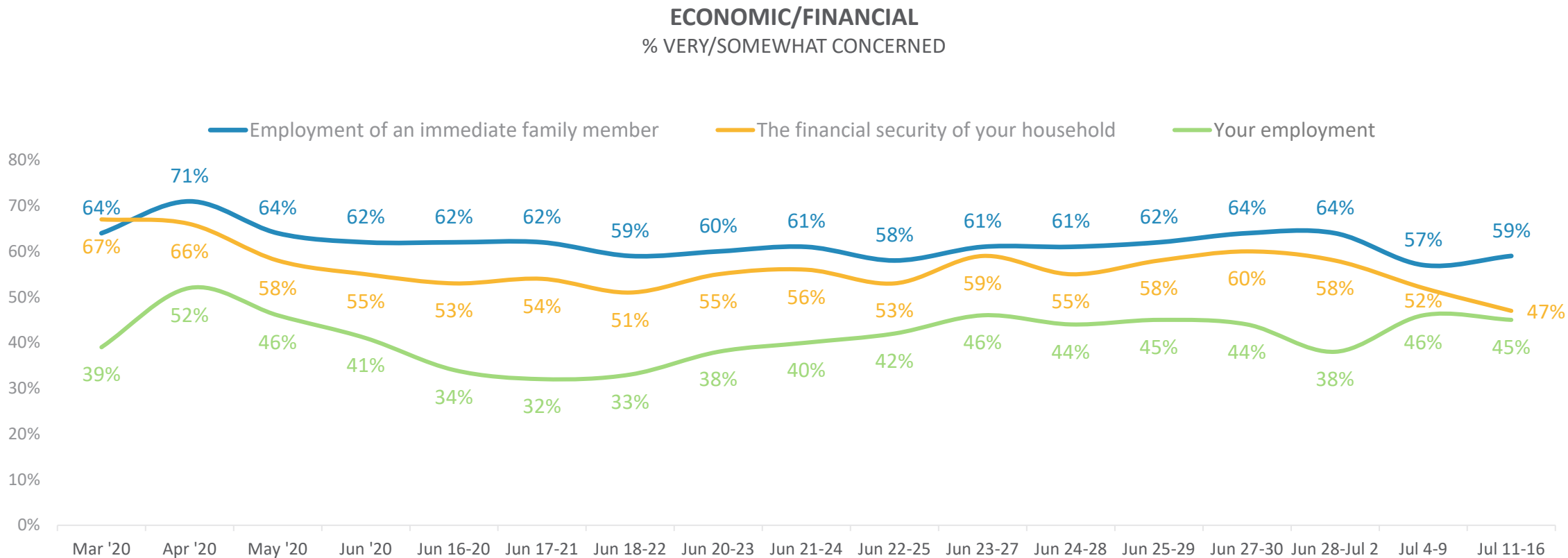
QCV-6. Thinking about the measures that the Government of Ontario has already taken to limit the spread of the virus, including advising the public and businesses about prevention measures, gradually reopening the province, and planning for the return to school in the fall, at this time would you say 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



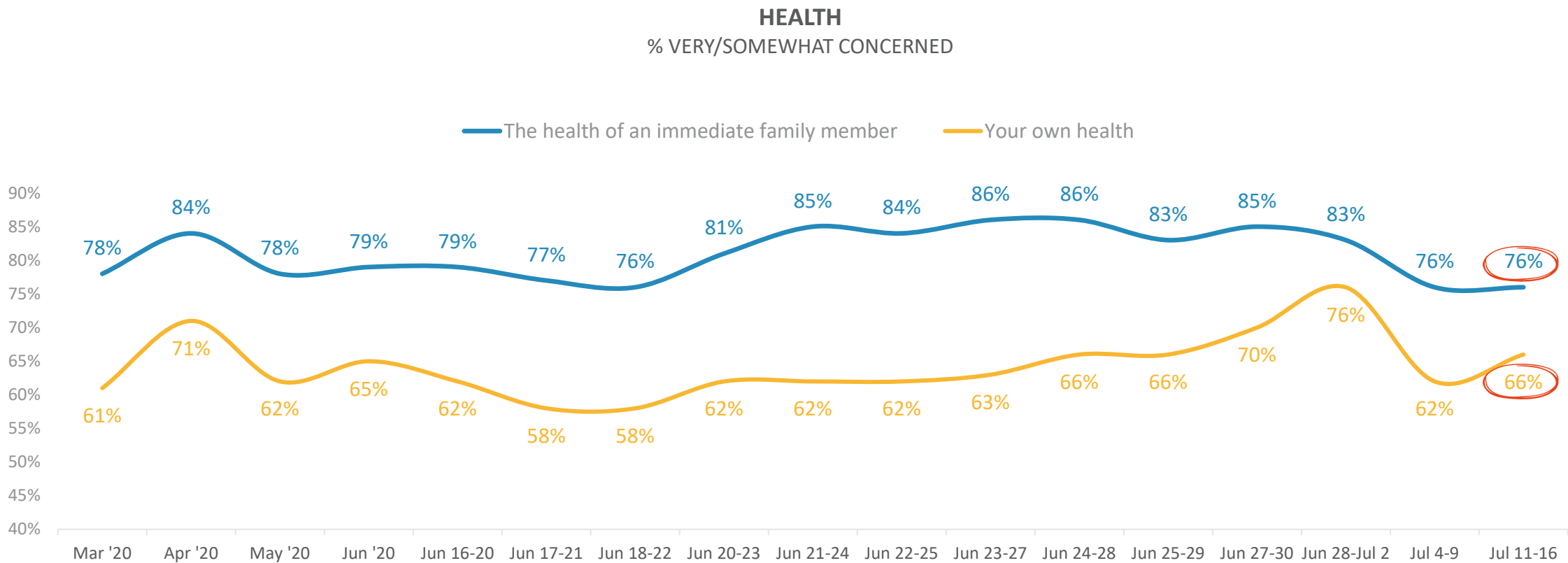
Ontarians’ concern about financial security has been easing – from 60% in late June to 47% in mid-July. However, concern with regard to their employment has moved upward.



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

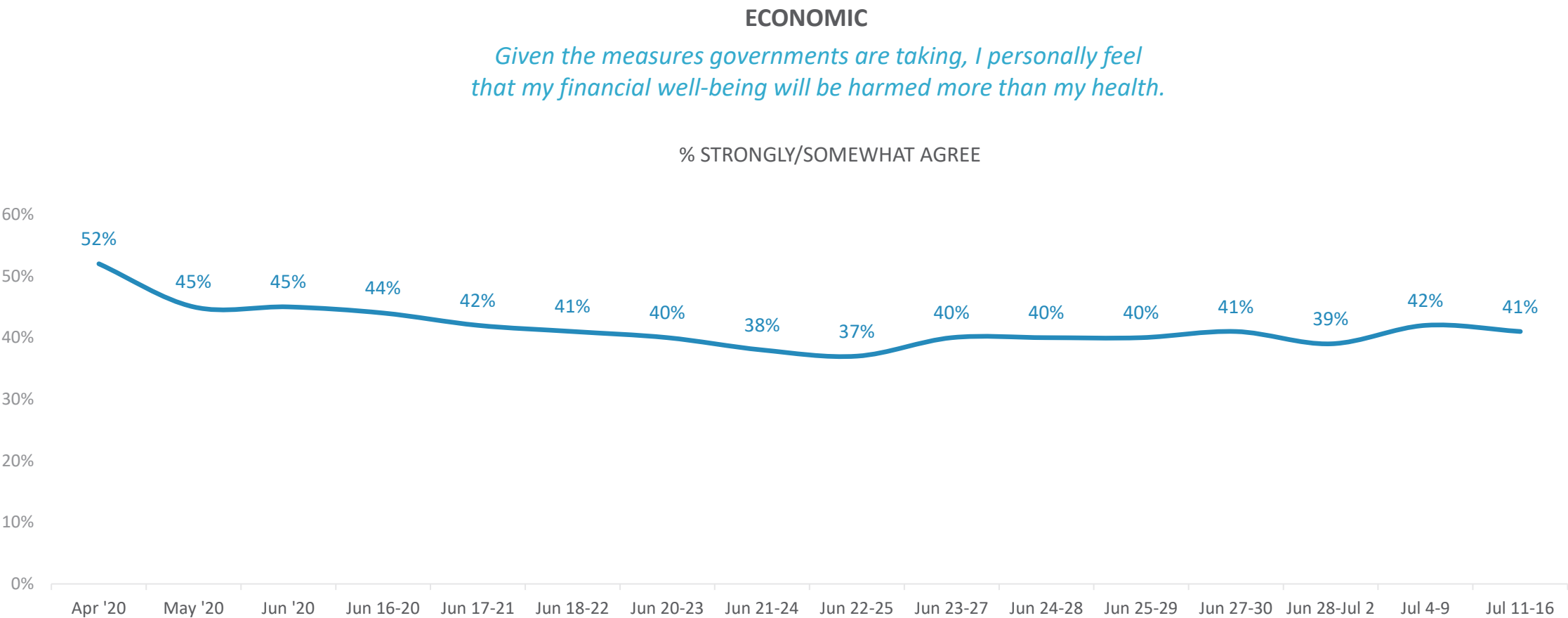
Moreover, concern of Ontarians about their personal health, and health of immediate family members, has generally eased slightly over the past two weeks.



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 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

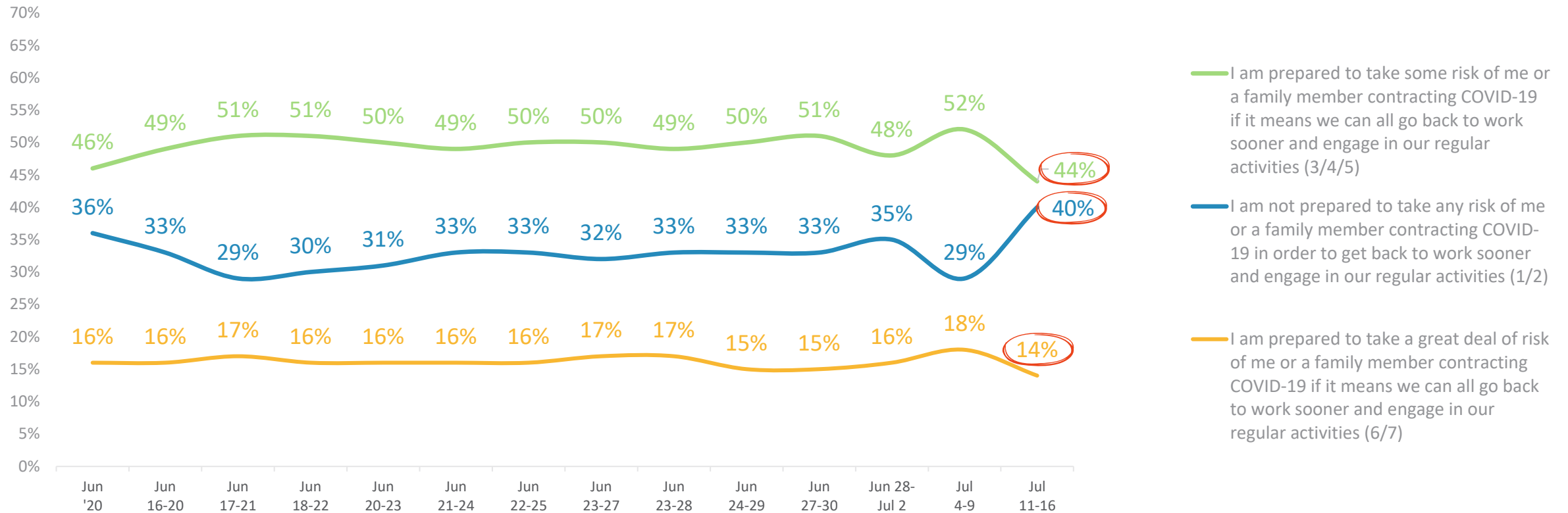
COVID-19 RISK TOLERANCE



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 has shifted. As the province moves to Phase 3, there has been a spike (up to 40%) in the proportion who are 'not prepared to take any risk', while those who wish to take at least 'some risk' has dropped from 80% to 58%.

- Women, those aged 35-44 and 65+, and those with no children in the household 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, rural residents, and those born in Canada.



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?

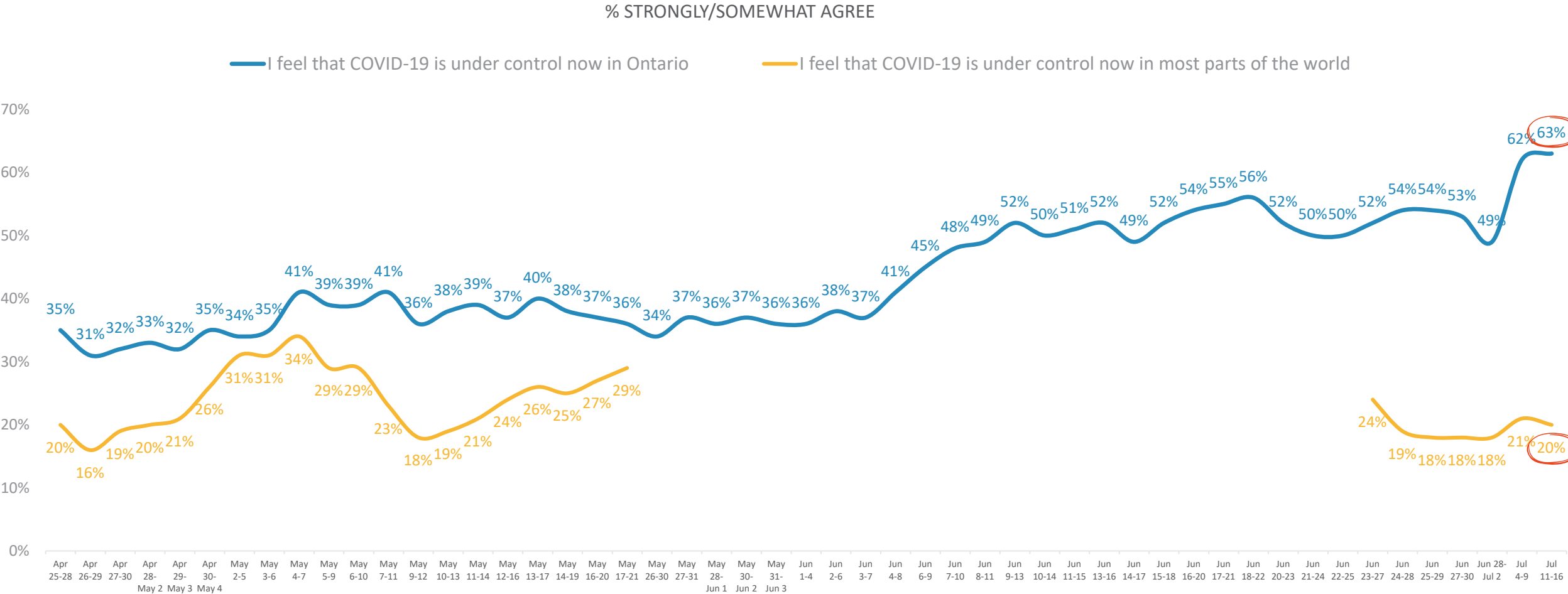
Base: Total sample ("Engage in our regular activities" added to statements June 11)

CONFIDENTIAL

PERCEPTIONS ABOUT WHETHER COVID-19 IS UNDER CONTROL

A majority (63%) of Ontarians believe that COVID-19 is under control in the province. And, the significant gap between Ontario and the rest of world continues to be evident.

- Men, city of Toronto residents, rural residents, those who think the government is on the ‘right track’, and those born outside Canada 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

About 76% say that they see people not following the social distance guidelines, while 70% are trying their best to get back to living a normal life. About two-thirds say the threat of contracting COVID-19 is much less now than it was a month ago.

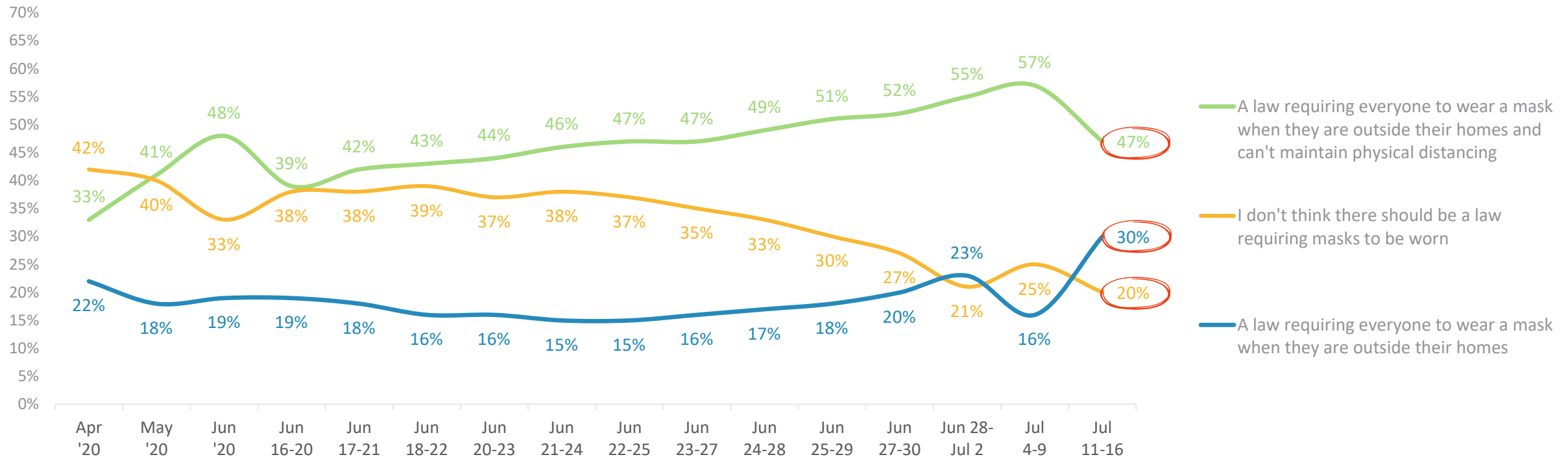
% STRONGLY/SOMEWHAT AGREE	June 10-14	June 11-15	June 13-16	June 14-17	June 15-18	June 16-20	June 17-21	June 18-22	June 20-23	June 21-24	June 22-25	June 23-27	June 24-28	June 25-29	June 27-30	June 28-July 2	Jul 4-9	Jul 11-16
n=	varies																	
	%	%	%	%	%	%	%	%	%	%	%	%	%	%	%	%	%	%
I think the threat 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	64	64
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	76	70
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	14	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	77	77	84	76

MASK WEARING PERCEPTIONS



Ontarians have shifted slightly toward some level of legal codification of face mask wearing: 77% want some legal requirement for this way of stopping the virus spread, but now some 30% want an across the board law on mask wearing.

- Men, those earning >\$100k, rural residents, 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 aged 65+, and those born outside Canada 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 continue to believe that mask wearing reduces COVID-19 risks. Just over one-quarter continues to think it is uncomfortable to wear a mask. And, some 36% think it is uncomfortable to wear a mask for more than a few minutes.

% 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	Jul 4-9	Jul 11-16
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	30	26
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	81	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	32	36

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 focus, there has been a significant shift in Ontarians' behaviour in wearing a mask over the past week. Now 72% (up from 60%) claim they are wearing a face mask 'all of the time' or 'most of the time' when away from home.

- Moreover, 45% (up from 22% a week ago) now say they wear a mask 'all of the time'.
- At the same time, only 5% now say they 'rarely' wear a mask.

	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-Jul 2	Jul 4-9	Jul 11-16
n=	313	400	400	410	410	410	410	410	410	300	300
	%	%	%	%	%	%	%	%	%	%	%
TOTAL ALL/MOST OF THE TIME	52	52	52	52	54	55	58	58	60	60	72
All of the time	26	27	27	23	25	25	25	29	29	22	45
Most of the time	26	25	26	29	29	31	33	29	32	38	27
Some of the time	26	26	28	28	26	25	24	26	24	20	20
Rarely	19	18	15	17	17	16	15	12	13	18	5
Never	4	3	4	3	3	4	3	3	3	3	2
RARELY/NEVER	23	21	20	20	20	20	18	15	16	21	7

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

Most Ontarians strongly support the large municipalities passing by-laws requiring people to wear masks or coverings. Only 4% ‘strongly’ oppose these by-laws.

	Jul 11-16
n=	300
	%
TOTAL SUPPORT	90
Strongly support	72
Somewhat support	18
Somewhat oppose	6
Strongly oppose	4
TOTAL OPPOSE	10
Don't know	<1

QCV-30A. Many of Ontario's largest cities have passed a by-law requiring face masks or coverings...Do you strongly support, somewhat support, somewhat oppose or strongly oppose this law?

Base: Total sample

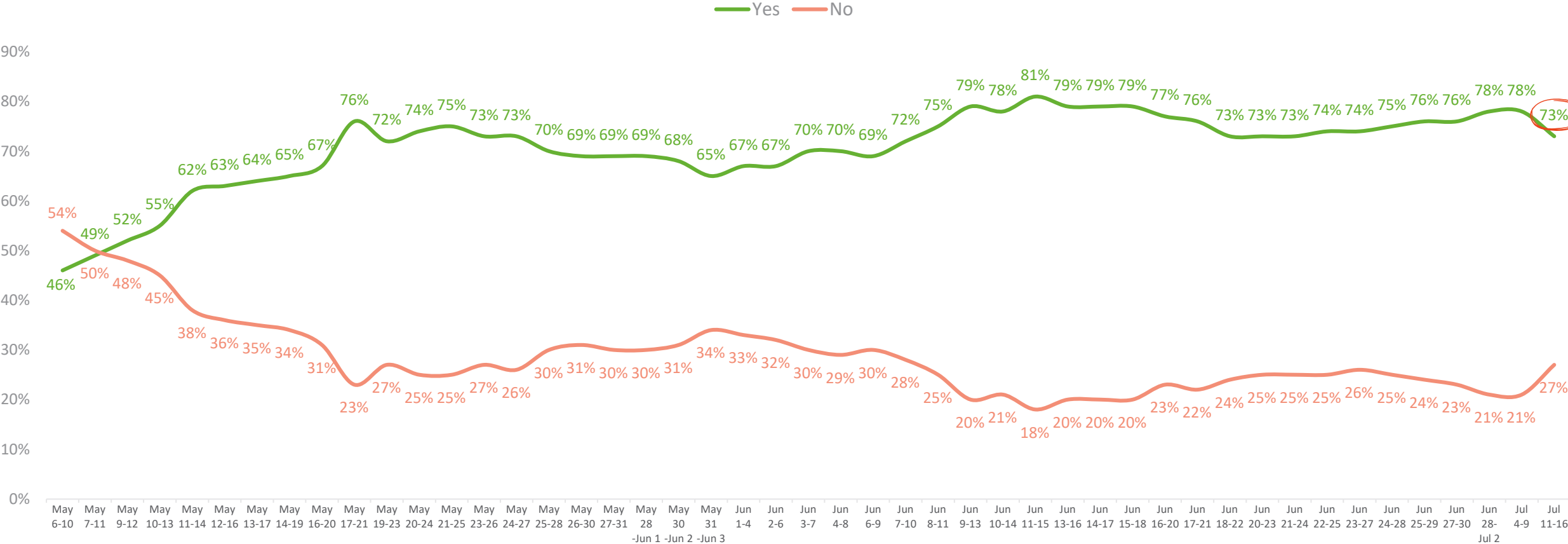
GUIDELINES FOR OPENING BUSINESSES



AWARENESS OF PROVINCIAL GUIDELINESS FOR RE-OPENING BUSINESSES

Even though much of the province is moving into Phase 3, awareness of the guidelines for the re-opening of Ontario businesses has slipped slightly to 73%.

- Women, those earning >\$40k, those born in Canada, and those aged 45-54 are the most aware of these guidelines.



FREQUENCY OF BUSINESSES NOT ADHERING TO PUBLIC HEALTH GUIDELINES

About one-third of Ontarians say they see retailers failing to ensure physical distancing, sanitizing surfaces, providing physical barriers at cash registers, and providing opportunities to do contactless payment options. About 20% say they see these shortcomings ‘very’ frequently.

	Jul 11-16
n=	300
	%
TOTAL FREQUENTLY	33
Very frequently	20
Somewhat frequently	13
Occasionally	16
Rarely	29
Never	18
TOTAL RARELY/NEVER	46
Don't know	5

QCV-54A. How frequently to do you see retailers who are failing to ensure physical distancing, sanitizing surfaces, providing physical barriers at cash registers, and giving opportunities to do contactless payment options?

Base: Total sample

GUIDELINES SHOULD REMAIN VOLUNTARY OR BE LEGALLY ENFORCED.

Among those Ontarians who see retailers not adhering to the guidelines, just over 1-in-2 say these guidelines need to be legally enforced.

	Jul 11-16
n=	100
	%
Voluntary	43
Legally enforced	55
Don't know	3

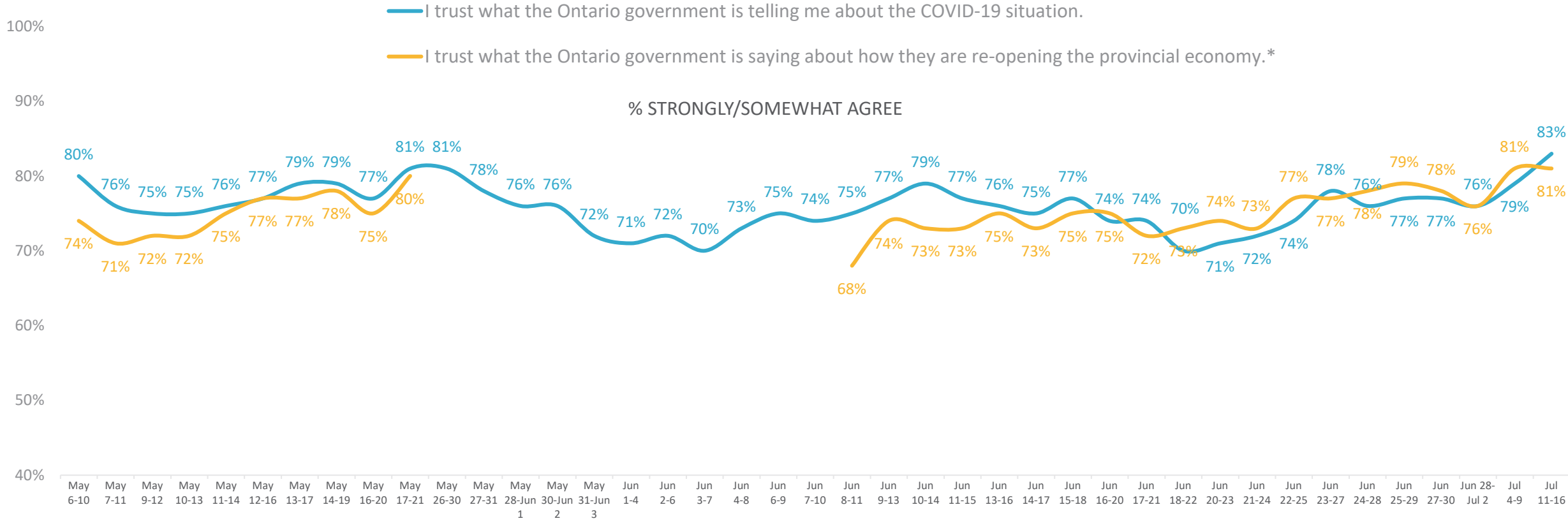
QCV-54B. Do you believe that these guidelines should be legally enforced or should remain voluntary?
Base: Very/somewhat frequently at Q54A

CONFIDENCE IN GOVERNMENT COVID-19 MESSAGING



TRUST IN THE GOVERNMENT’S COMMUNICATIONS ABOUT COVID-19

Ontarians continue to trust the government’s messaging about the economic re-opening and general COVID-19 situation, with both reaching their highest points.



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 74% say they have enough information about the virus. And, about 39% say they are paying less attention to COVID-19 news or information. However, interestingly, only 1-in-5 reject the view that they don't need to hear any more news about the virus.

% 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	Jul 4-9	Jul 11-16
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	52	39
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	78	74
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	22	20

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

Base: Total sample

COVID-19 ISSUES
AMONG FARM
WORKERS IN
SOUTH WEST ONTARIO



About 71% say they are aware of the issue of COVID-19 illnesses among farm workers in South West Ontario.

	Jul 11-16
n=	300
	%
Yes	71
No	28
Don't know	1

QCV-106. Are you aware or not of the issue of COVID-19 illnesses among farm workers in South West Ontario?

Base: Total sample

Ontarians are divided on the management of the COVID-19 health issues among farm workers in South West Ontario. About 40% say the government has managed it well, but 48% believe it was managed poorly.

	Jul 11-16
n=	213
	%
TOTAL WELL	40
Very well	9
Somewhat well	31
Somewhat poorly	33
Very poorly	15
TOTAL POORLY	48
Don't know	12

QCV-107. How well or poorly has the Ontario Government managed the issue of COVID-19 among farm workers in South West Ontario?

Base: Total sample

Most Ontarians say they are concerned about the issue, with 44% saying they are ‘very’ concerned.

	Jul 11-16
n=	213
	%
TOTAL CONCERNED	89
Very concerned	44
Somewhat concerned	44
Not too concerned	8
Not at all concerned	3
TOTAL NOT CONCERNED	11
Don't know	1

QCV-108. How concerned are you about the issue of farm workers in South West Ontario contracting COVID-19?

Base: Total sample

BUYING ONTARIO MADE GOODS



Ontarians are pre-disposed to buy Ontario-made products. However, if they understand the economic benefits (i.e. jobs) they are even more pre-disposed to purchase Ontario-made products. Once Ontarians understand the context of buying Ontario-made products, we may see some boost

If a product was identified as Ontario made, how likely would you be to buy the Ontario made product versus one made elsewhere and if the Ontario made product cost ... (% Very Likely)	July 11-16
... the same as a similar non-Ontario made one?	91%
... 5% more than a similar non-Ontario made one?	78%
... 10% more than a similar non-Ontario made one?	65%
... 20% more than a similar non-Ontario made one?	36%

WITH CONTEXT: As you likely know, the response to the COVID-19 pandemic has led to the loss of many jobs in the province and significant damage to Ontario businesses. One way to help bring jobs back is for Ontarians to buy Ontario made products.

If a product was identified as Ontario made, how likely would you be to buy the Ontario made product versus one made elsewhere and if the Ontario made product cost ... (% Very Likely)	July 11-16	Change after context provided:
... the same as a similar non-Ontario made one?	93%	+2
... 5% more than a similar non-Ontario made one?	83%	+5
... 10% more than a similar non-Ontario made one?	75%	+10
... 20% more than a similar non-Ontario made one?	53%	+17

QCV-110AA-AD. For the following situation, if a product was identified as Ontario made, how likely would you be to buy the Ontario made product versus one made elsewhere and if ?

QCV-110BA-BD. As you likely know, the response to the COVID-19 pandemic has led to the loss of many jobs in the province and significant damage to Ontario businesses. One way to help bring jobs back is for Ontarians to buy Ontario made products.

For the following situation, if a product was identified as Ontario made, how likely would you be to buy the Ontario made product versus one made elsewhere and if ?

Base: Total sample