

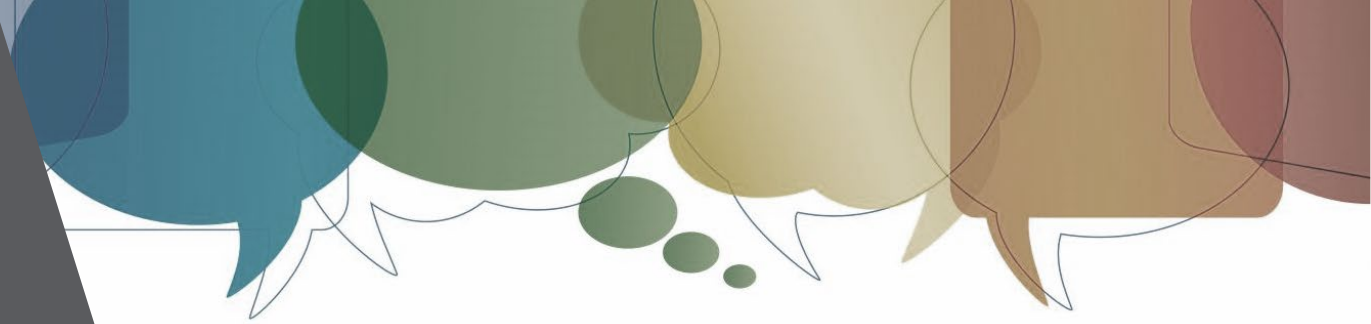


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JULY 2020 RESEARCH

PULSE REPORT ON COVID-19 – REPORT #40

CABINET OFFICE

July 24th 2020



KEY FINDINGS

Key Findings

1 The government's 'right track' scores have stabilized at 78% over the past week. The government is perceived to be managing this pandemic in a cautious, prudent, and careful manner in order to sustain these 'right track' scores over a 4-month period.

4 Since the announcement on long-term care last week, the government's performance on 'effectively managing long-term care' has improved by 11-points from -18 to -7.

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

2 The Ontario government continues to receive strong marks for 'managing the re-opening of the economy'.

A slight majority of Ontarians believe that the pace of moving to Phase 3 has been appropriate, although there is a sizeable minority who thinks it is too fast.

5 However, over the past week, an increased proportion (now at 28%, up from 8% in April) of Ontarians feel the government is 'not doing as much as they should'. Still, over two-thirds say the government is 'doing what is required'.

'Planning for the return to school in the fall' is the one area where many Ontarians feel the government is not doing as much as they should.

3 Over the past week, the government's performance was perceived to be much better (increasing to 38% from 25%) on 'building the provincial economy'.

This rise has likely occurred in response to the government's 'Getting Ontario Back on Track'.

6 Views about mask wearing has changed significantly over the past four months. Ontarians have moved toward some level of legal codification of face mask wearing: 80% (up from 55% in April) want some legal enforcement.

Responding to the intense media focus, the significant shift in Ontarians' behaviour in wearing a mask continued over the past week. Now 76% (up from 60% two weeks ago) claim they are wearing a face mask 'all of the time'/most of the time'.

Key Findings

7 'Going inside to an indoor bar' or 'to a casino' are perceived to be very risky behavior, while 'eating on a restaurant patio' or 'returning to work at an office' are perceived to be much less risky.

The perceived high risk of 'going inside to an indoor bar' is evident across all demographic groups including those aged 18-34.

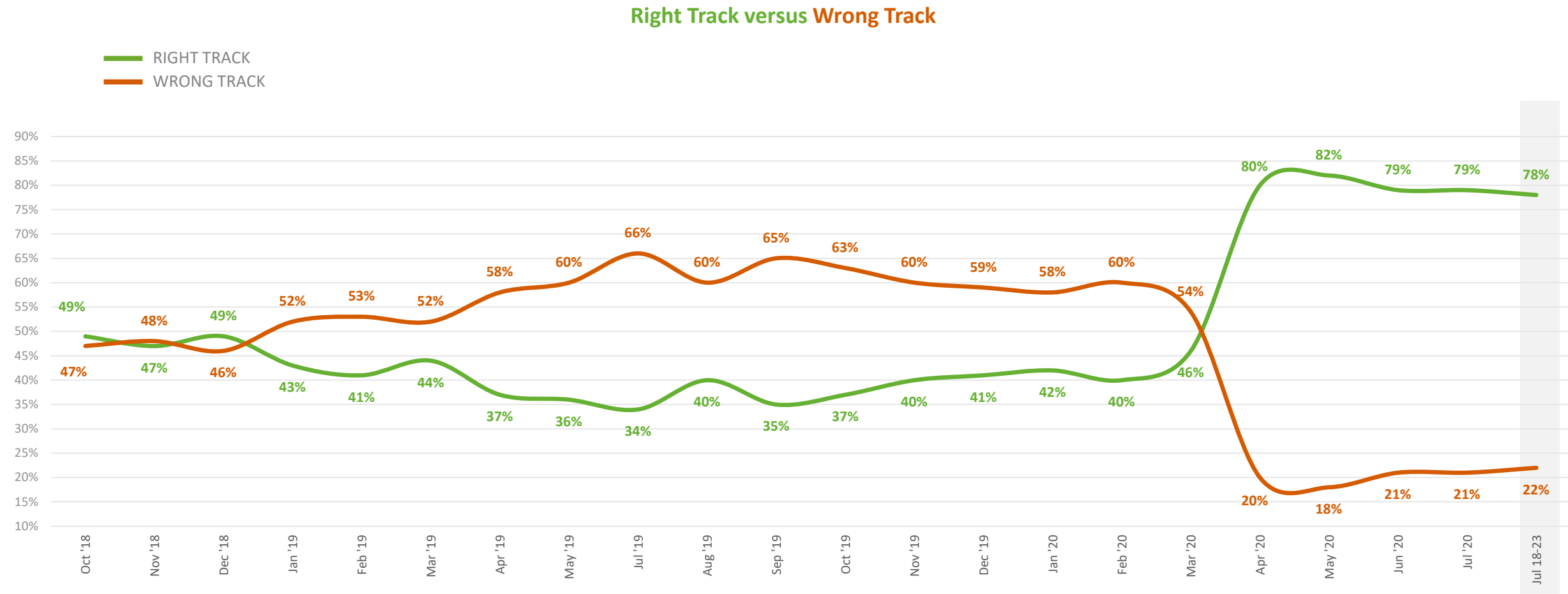
8 Not surprisingly, Ontarians have strong preferences in purchasing Ontario-made products. One-third even claim they are willing to purchase Ontario-made products priced 20% above non-Ontario made products. We know from other research that this pre-disposition does not translate into actual buying behaviour.

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

RIGHT TRACK
WRONG TRACK



Over the past week, the government’s ‘right track’ scores have stabilized at 78%. On a month by month basis, the ‘right track’ scores have remained remarkably stable at historic high levels.

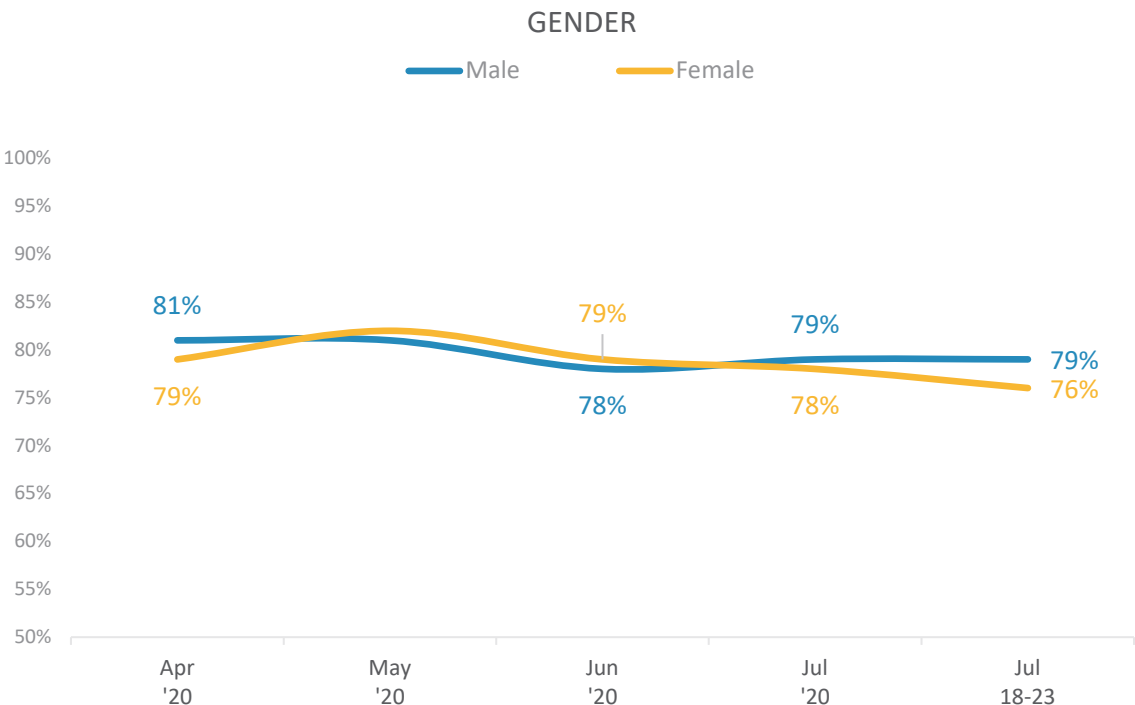
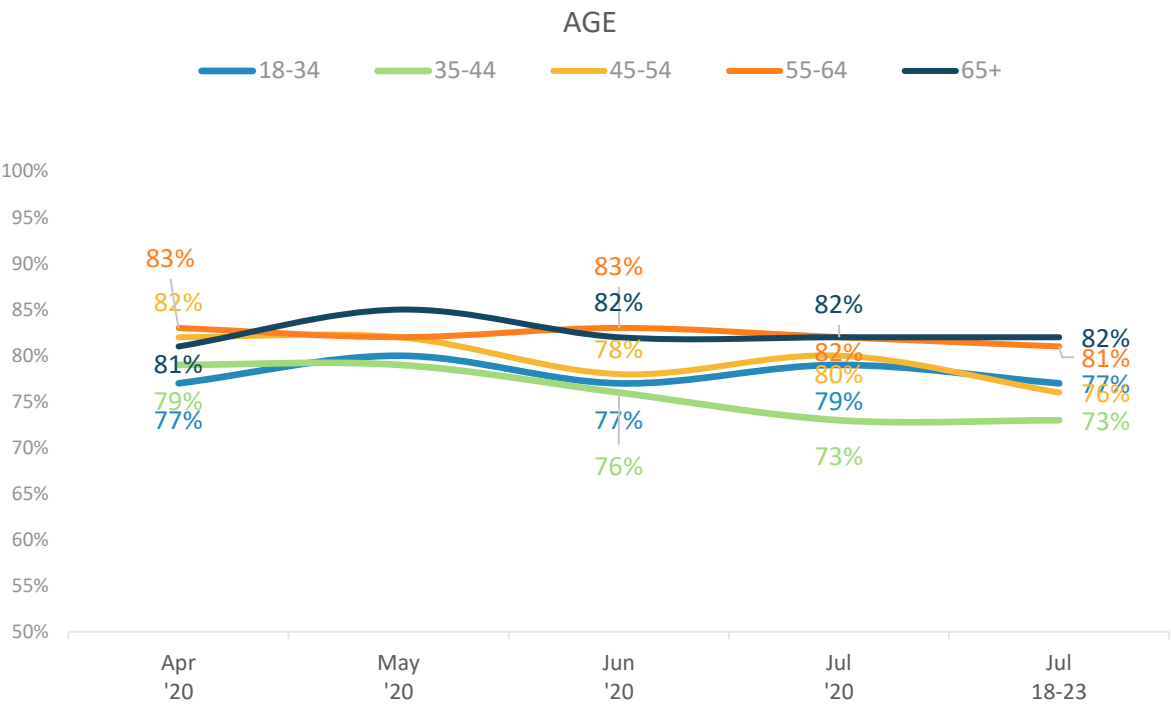


These graphs are based on 4 day roll in order to boost the sample sizes.

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 are weakest among the 35-44 age group.

Right Track Scores – 6-Day Roll

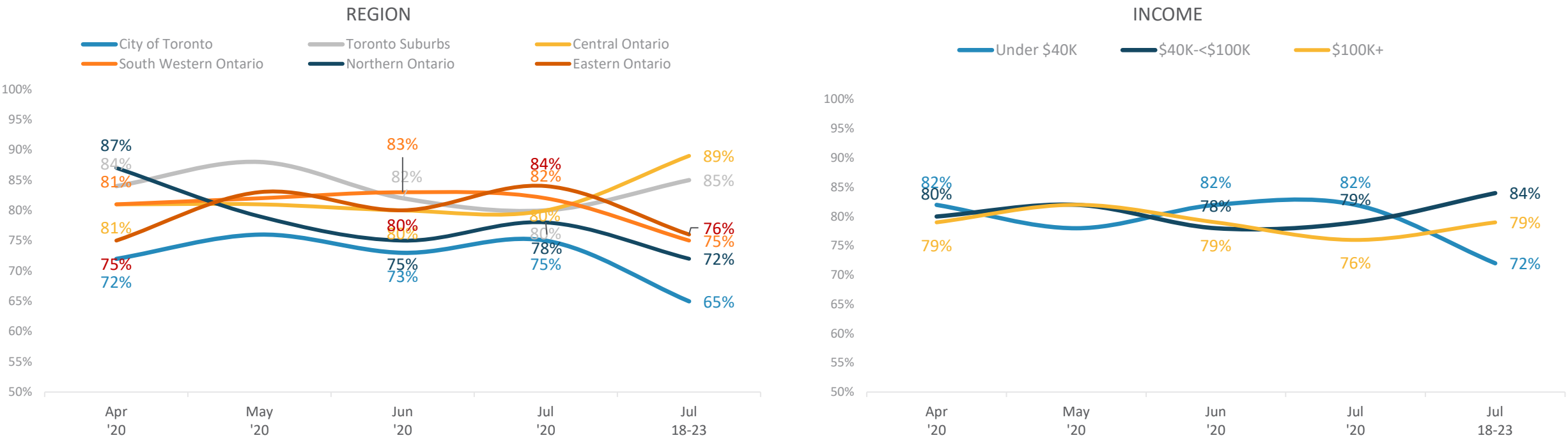


These graphs are based on 5 day roll in order to boost the sample sizes.

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 weakened across most regions except for Toronto suburbs/Central Ontario. These scores are also stronger among those earning \$40k-\$100k, but much weaker among those earning <\$40k.

Right Track Scores – 6-Day Roll

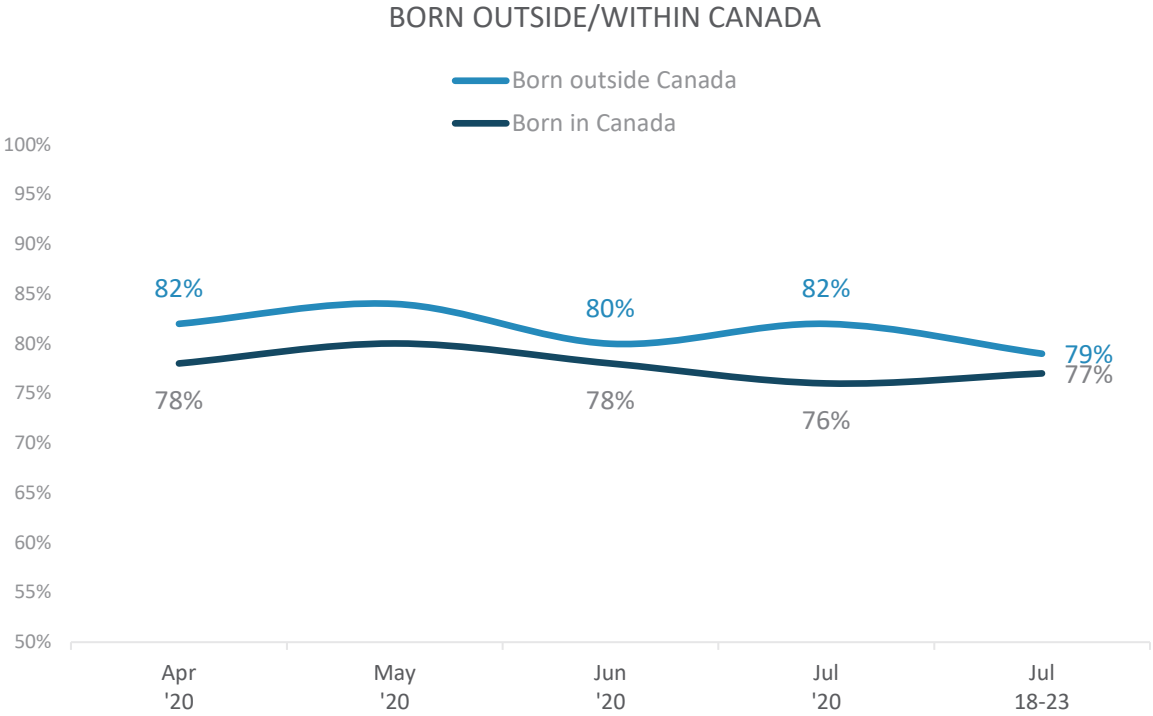
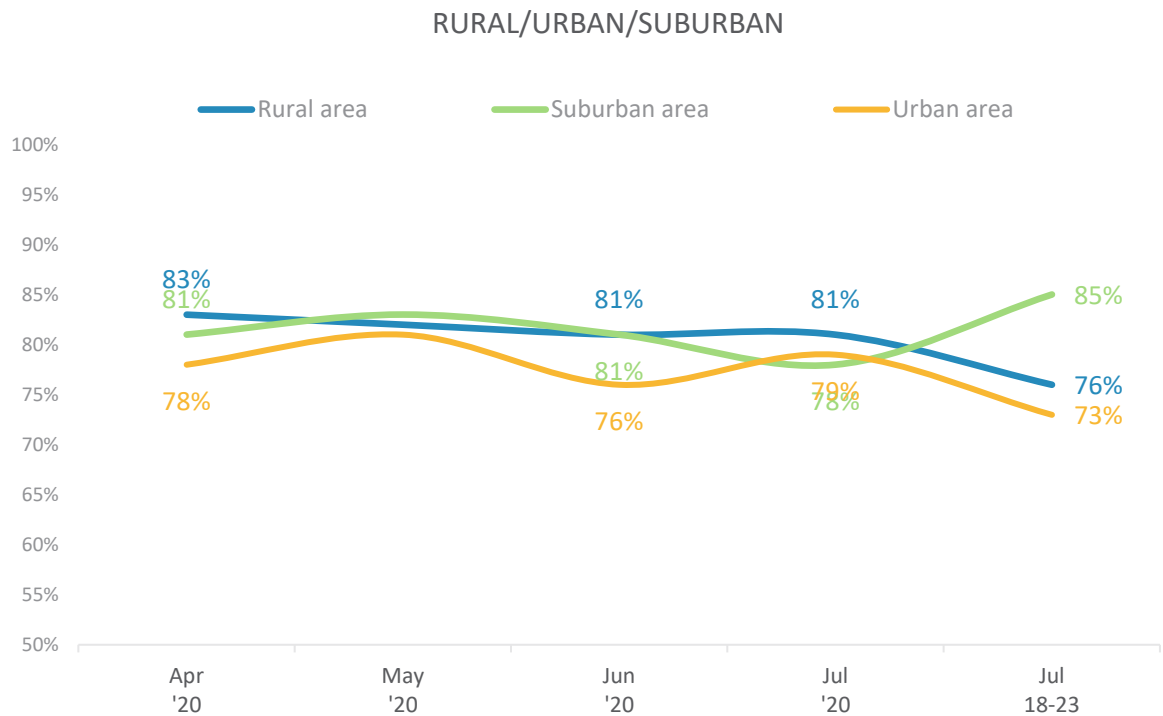


These graphs are based on 5 day roll in order to boost the sample sizes.

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 have weakened among rural/urban residents, while are stronger with suburban residents.

Right Track Scores – 6-Day Roll



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

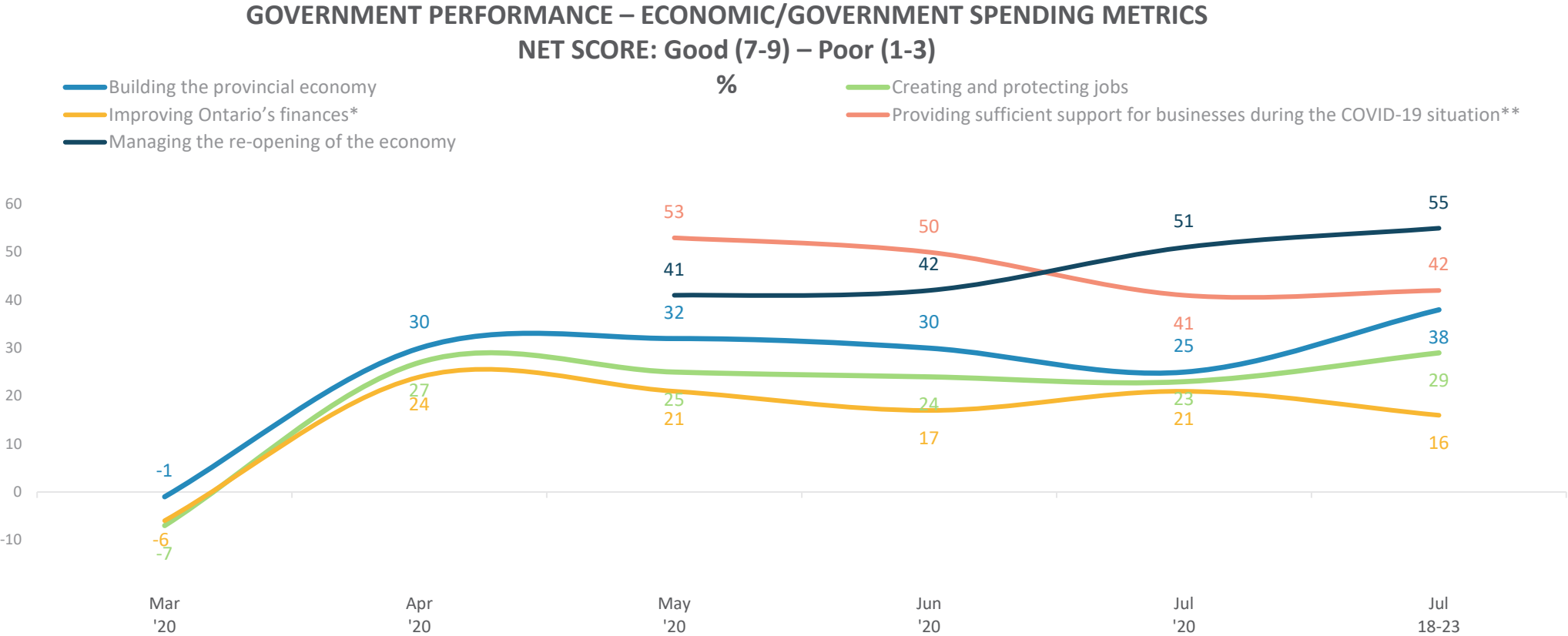
Q2. Overall, do you feel that the Ontario provincial government is on the right track or the wrong track, in terms of how it is governing the province? Base: Total sample

PERCEPTIONS OF GOVERNMENT PERFORMANCE DURING COVID-19 PANDEMIC



As the government opens up the economy, perceptions of its performance on ‘managing the re-opening of the economy’ continues to increase: to 55% over the past week. In addition, ‘building the provincial economy’ has increased to 38% from 25% over the past seven days.

- Perceptions about the government’s performance on providing ‘sufficient support for small business’ has softened in July compared to May/June.

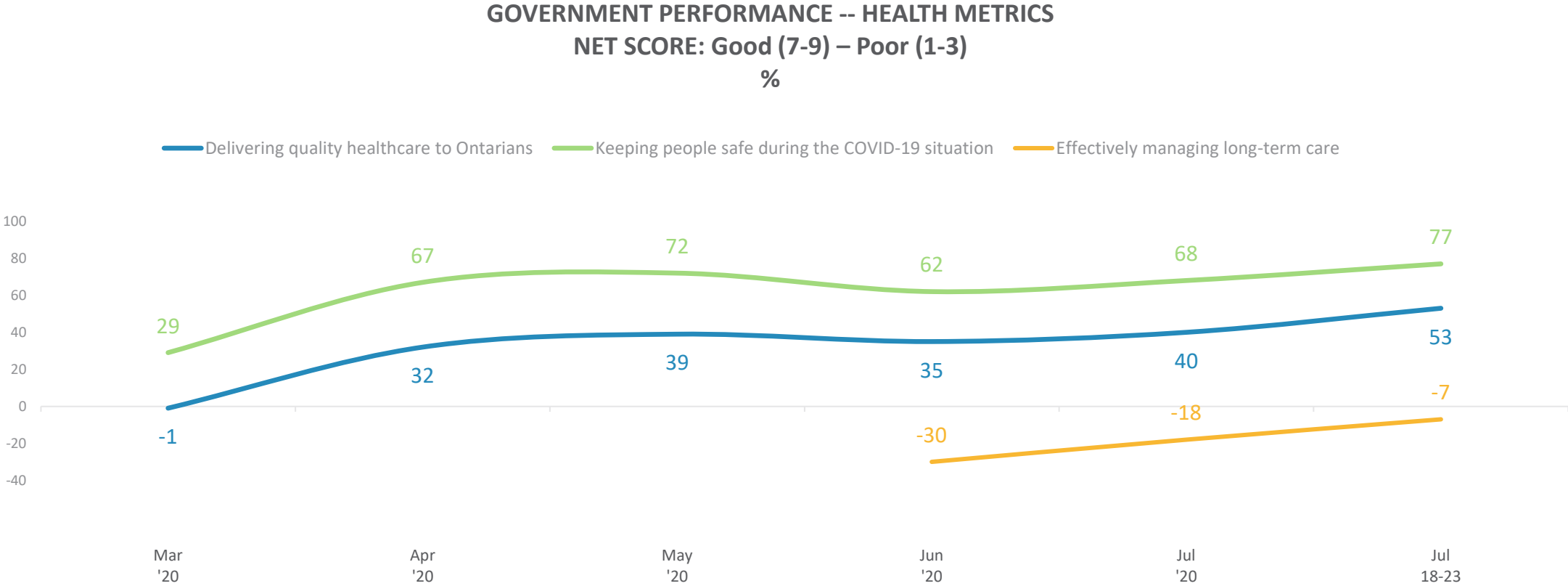


Q5. Using a scale where, where 1 means “poor” and nine is “excellent”, how would you rate the performance of Ontario government at managing each of the following?
*Former phrasing: “Improve Ontario’s finances”
**Former phrasing: “Sufficient business support during the COVID-19 situation”

Bases vary

Since the announcement on long-term care last week, the government’s performance on ‘effectively managing long-term care’ has improved from -18 to -7.

- Moreover, Ontarians continue to give stronger 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.

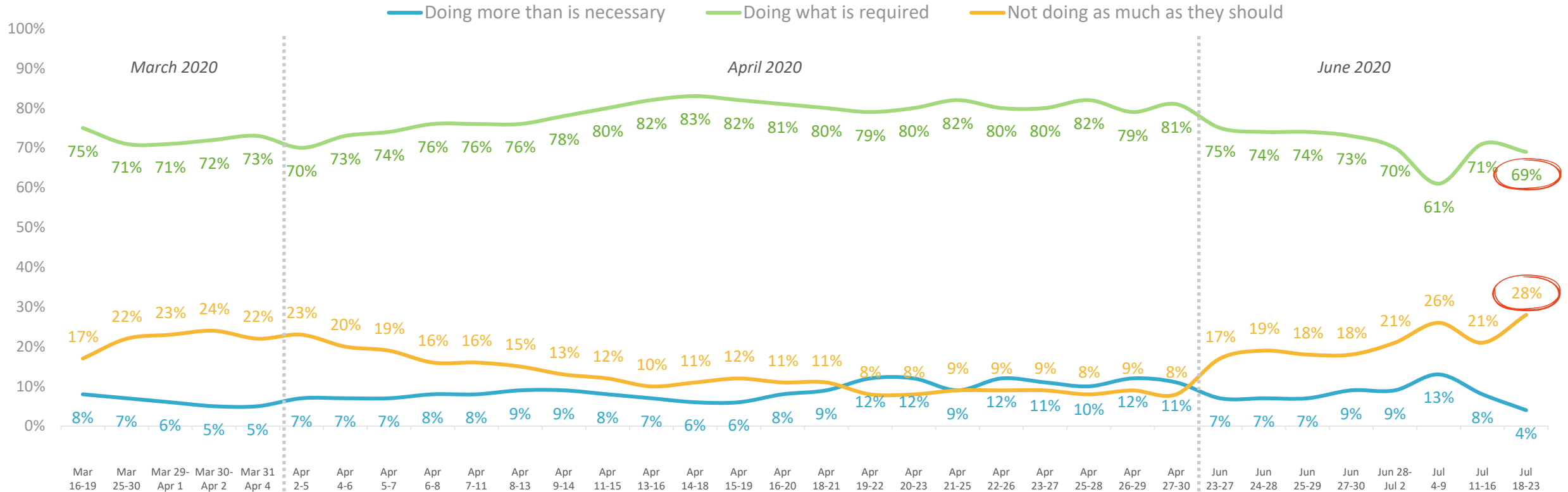
Ontario’s gradual and careful re-opening has been the right approach compared to the more rapid opening process in the United States.

	Jul 4-9	Jul 11-16	Jul 18-23
n=	varies		
	%	%	%
TOTAL AGREE	91	94	93
Strongly agree	72	77	75
Somewhat agree	19	17	19
Neither agree nor disagree	2	1	3
Somewhat disagree	3	2	1
Strongly disagree	3	2	2
TOTAL DISAGREE	6	4	3
Don't know	2	1	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

ONTARIO GOVERNMENT COVID-19 MEASURES

Over the past week, an increased proportion (now at 28%, up from 8% in April) of Ontarians feel the government is ‘not doing as much as they should’. Still, over two-thirds say the government is ‘doing what is required’.



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

‘Planning for the return to school in the fall’ is the one area where many Ontarians feel the government is not doing as much as they should.

	% DOING MORE THAN IS NECESARY	% DOING WHAT IS REQUIRED	% NOT DOING AS MUCH AS THEY SHOULD
	Jul 18-23	Jul 18-23	Jul 18-23
	%	%	%
Advising the public and businesses about the measures they should take to prevent the spread of the virus	10	72	14
Managing the process of gradually re-opening the province	11	71	18
Taking the necessary actions to prevent the spread of the virus	13	68	18
Planning for the return to school in the fall	7	48	35

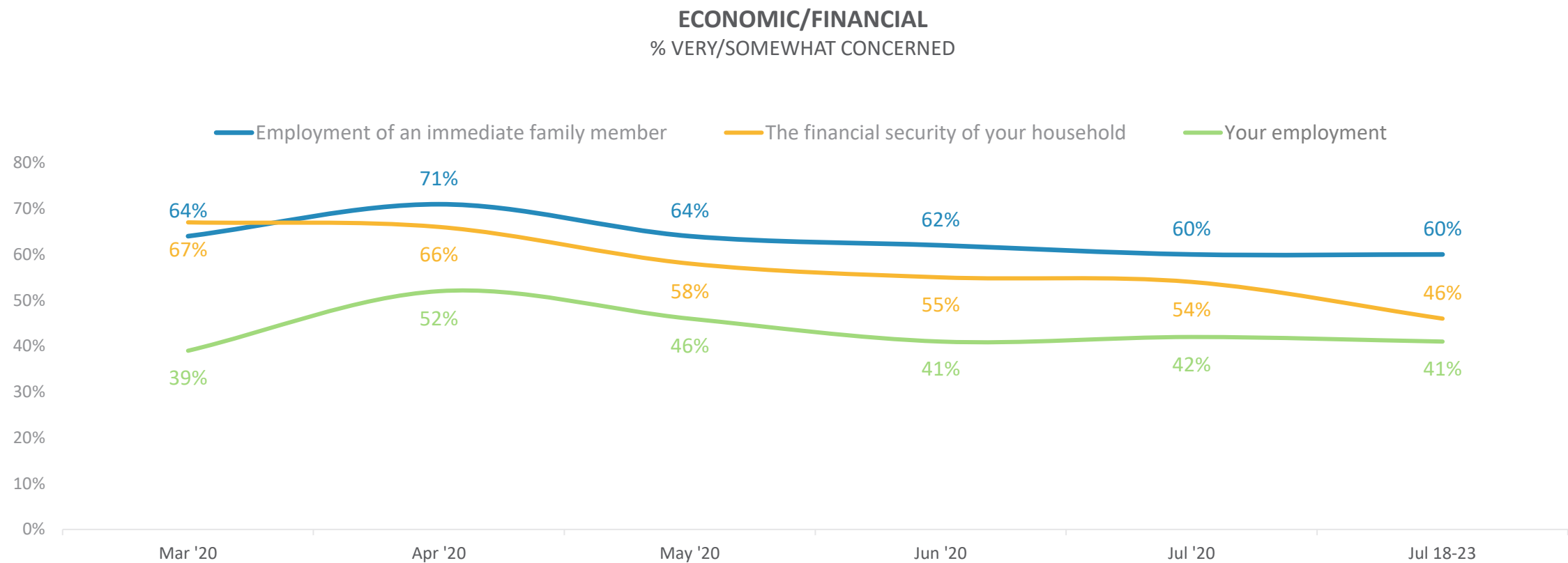
QCV-6a. For each of the following areas dealing with its response to COVID-19, is the Government of Ontario doing more than is necessary, doing what is required, or not doing as much as they should. The first is ...

Base: Total sample

CONCERNS ABOUT IMPACT OF COVID-19



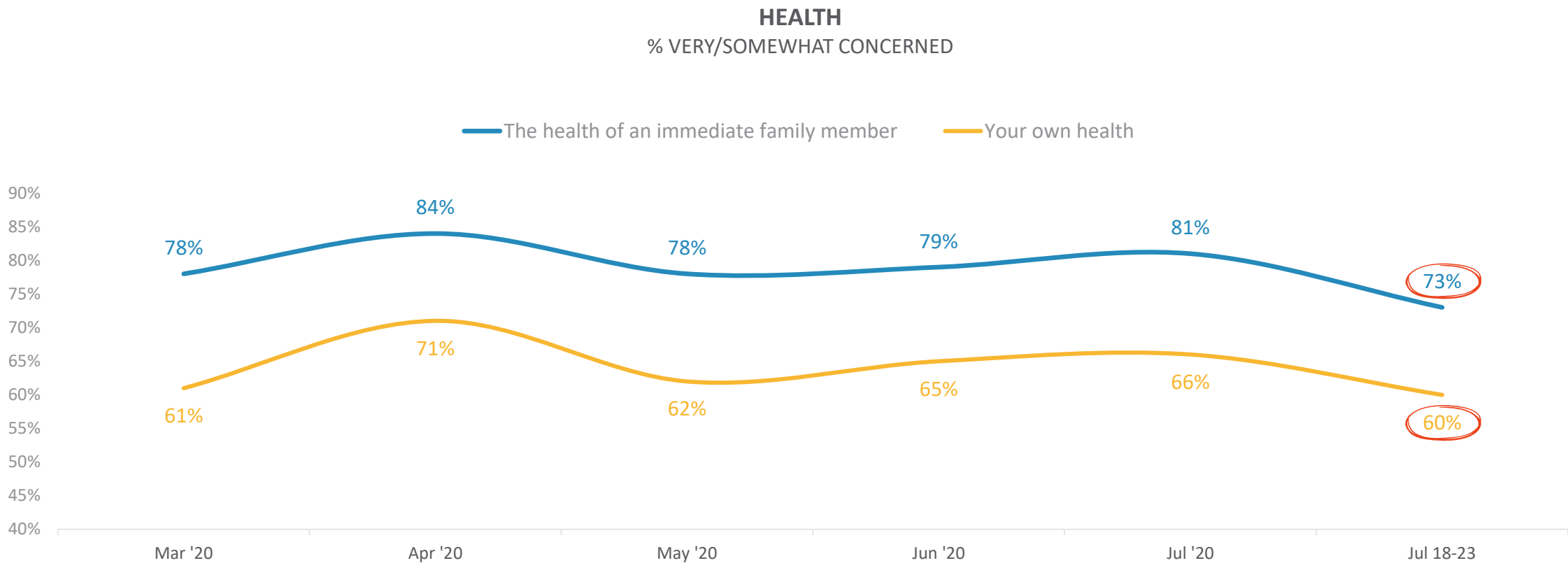
Compared to the early days of the pandemic, Ontarians’ concern about financial security and employment has been easing. However, deep concerns continue to be prevalent.



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

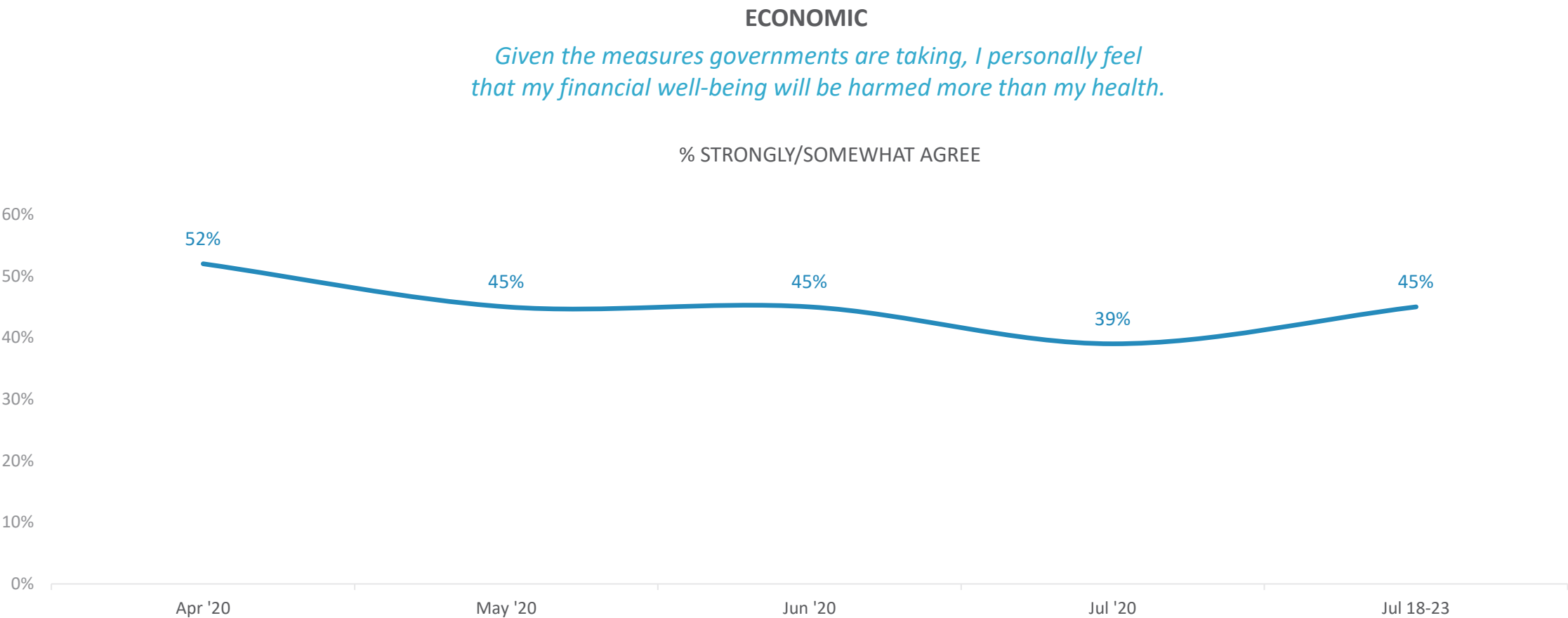
Moreover, concern of Ontarians about their personal health, and health of immediate family members, has eased to its lowest level.



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.



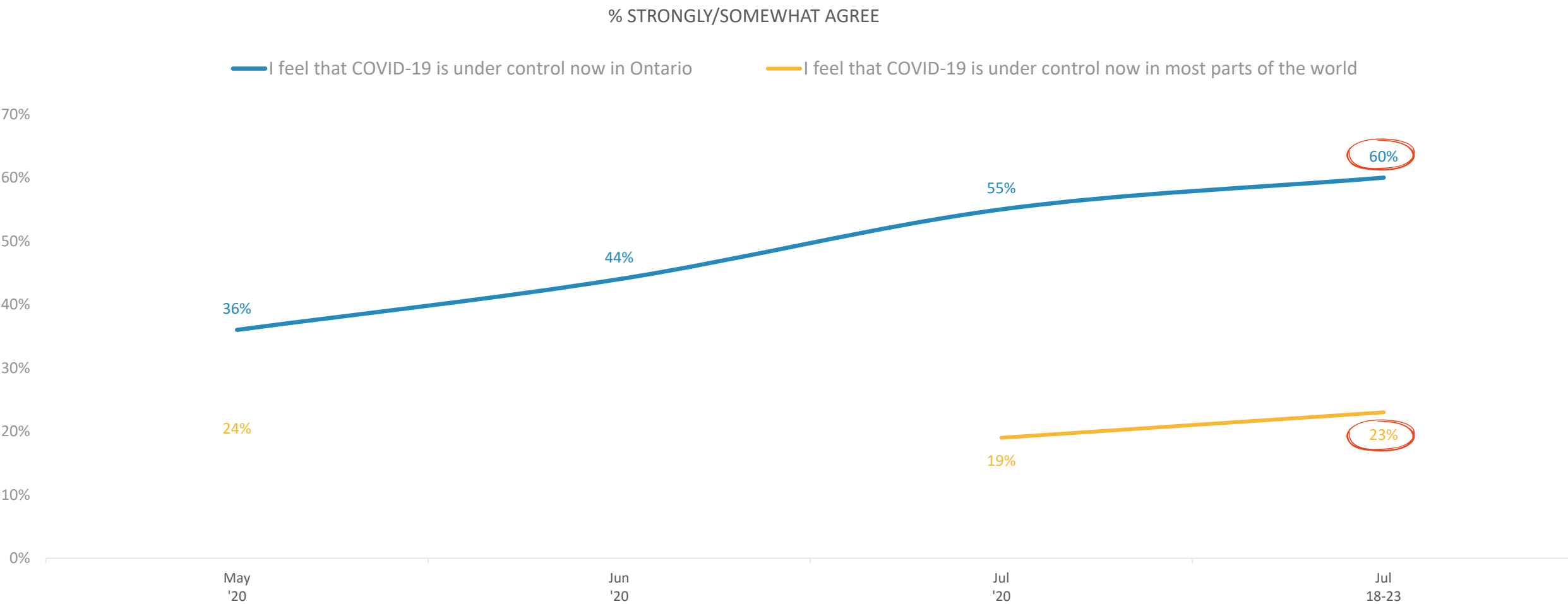
QCV-8B. Do you agree or disagree with each of the following statements about the effects of COVID-19. The first is ...
Base: Total sample, bases vary

COVID-19 RISK TOLERANCE



PERCEPTIONS ABOUT WHETHER COVID-19 IS UNDER CONTROL

Despite slight increases in COVID-19 infections, a majority 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.



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

MOVING TO PHASE 3 – PACE OF THE SHIFT

As the province moves into Phase 3, a modest majority of Ontarians feel the shift to Phase 3 is at the right pace. However there is a large minority (37%) who thinks the move to Phase 3 has been too quick. Only 6% feel the shift has been moving too slowly.

	Jul 18-23
n=	300
	%
Moving too quickly	37
At the right pace	56
Moving too slowly	6
Prefer not to answer/Don't know	1

	Moving too Quickly	At the Right Pace	Moving too Slowly
	%	%	%
Right Track	33	62	4
Wrong Track	52	33	15

QCV-112. Many parts of Ontario are now into Phase 3 of the reopening of the economy and this means that bars, gyms, indoor dining facilities and casinos, among other facilities, are open or soon will be open with restrictions, such as social distancing and wearing a face covering. Do you believe the government is moving too quickly, at the right pace, or moving too slowly in the moving Ontario into Phase 3.

Base: Total sample

PERCEIVED RISK OF PHASE 3 ACTIVITIES

‘Going inside to an indoor bar’ or ‘to a casino’ are perceived to be ‘very’ risky behavior, while ‘eating on a restaurant patio’ or ‘returning to work at an office’ are perceived to be less risky.

	% VERY/SOMEWHAT RISKY		Phase 3 Activities – Tiers of Perceived Risk
	% VERY RISKY		
	Jul 18-23		
n=	300	300	
	%	%	
Going inside to an indoor bar	70	92	Higher
Going to a casino	68	91	
Working out in a gym	51	90	Medium
Eating at an indoor restaurant	42	85	
Going to a wedding	42	86	
Sending children to school	42	86	
Sending children to a daycare	39	85	Lower
Returning to work at an office	17	74	
Eating on a restaurant patio	7	53	

QCV-111. To what extent do you feel that the following activities present a risk for transmission of the COVID-19 virus?

Base: Total sample

Two metrics hit their highest level: 78% are trying their best to get back to living a normal life and 67% (up from 54% in mid-June) say the threat of contracting COVID-19 is much less now than it was a month ago.

- About 77% say that they see people not following the social distance guidelines.
- Only 1-in-10 Ontarians believe that COVID-19 is no longer a significant public health risk.

% 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	Jul 18-23
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	67
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	78
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	11
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	77

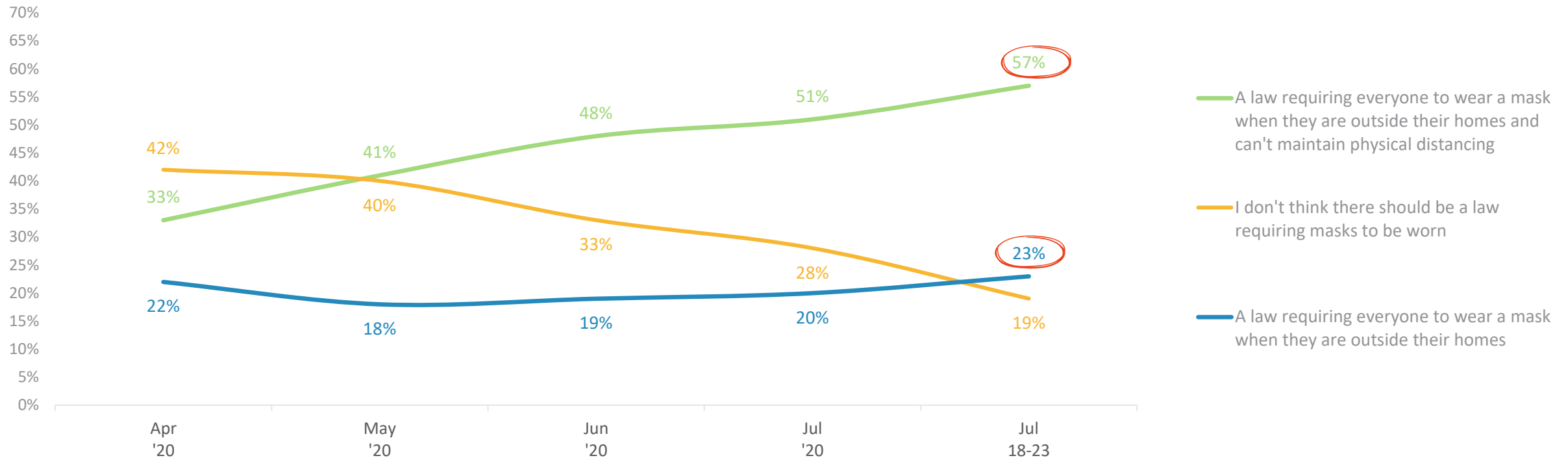
MASK WEARING PERCEPTIONS



MAKING THE WEARING OF A MASK A LEGAL REQUIREMENT

Views about mask wearing has changed significantly over the past four months. Ontarians have moved toward some level of legal codification of face mask wearing: 80% (up from 55% in April) want some legal enforcement for this way of stopping the virus spread.

- Now only 19% (down from 42% in April) do not want an across the board law on mask wearing.



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

Base: Total sample

CONFIDENTIAL

Ontarians are becoming slightly less uncomfortable wearing a mask. And, there has been a slight increase in the number of Ontarians who believe that mask wearing reduces COVID-19 risks.

% 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	Jul 18-23
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	23
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	88
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	34

FREQUENCY OF FACE MASK WEARING

Responding to the intense media focus, the significant shift in Ontarians' behaviour in wearing a mask continued over the past week. Now 76% (up from 60% two weeks ago) claim they are wearing a face mask 'all of the time' or 'most of the time' when away from home.

- At the same time, only 8% now say they 'rarely' or 'never' 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-July 2	Jul 4-9	Jul 11-16	Jul 18-23
n=	313	400	400	410	410	410	410	410	410	300	300	300
	%	%	%	%	%	%	%	%	%	%	%	%
TOTAL ALL/MOST OF THE TIME	52	52	52	52	54	55	58	58	60	60	72	76
All of the time	26	27	27	23	25	25	25	29	29	22	45	42
Most of the time	26	25	26	29	29	31	33	29	32	38	27	34
Some of the time	26	26	28	28	26	25	24	26	24	20	20	17
Rarely	19	18	15	17	17	16	15	12	13	18	5	7
Never	4	3	4	3	3	4	3	3	3	3	2	1
RARELY/NEVER	23	21	20	20	20	20	18	15	16	21	7	8

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

Reflecting the health benefits of mask wearing, most Ontarians continue to strongly support the large municipalities passing by-laws requiring people to wear masks or coverings. Only 6% ‘strongly’ oppose these by-laws.

	Jul 11-16	Jul 18-23
n=	300	300
	%	%
TOTAL SUPPORT	90	90
Strongly support	72	72
Somewhat support	18	18
Somewhat oppose	6	4
Strongly oppose	4	6
TOTAL OPPOSE	10	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?

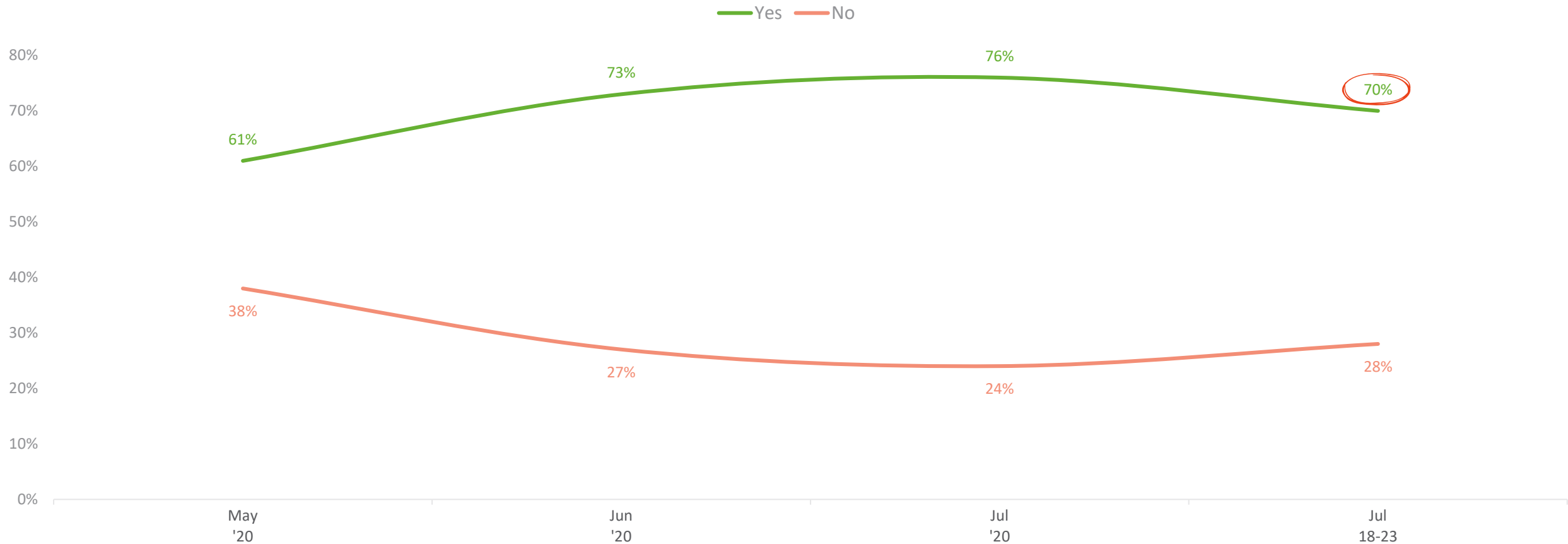
Base: Total sample

GUIDELINES FOR OPENING BUSINESSES



AWARENESS OF PROVINCIAL GUIDELINES 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 70% over the past week.



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

CONFIDENTIAL

FREQUENCY OF BUSINESSES NOT ADHERING TO PUBLIC HEALTH GUIDELINES

About one-third of Ontarians continue to 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 19% say they see these shortcomings ‘very’ frequently.

	Jul 11-16	Jul 18-23
n=	300	300
	%	%
TOTAL FREQUENTLY	33	32
Very frequently	20	19
Somewhat frequently	13	13
Occasionally	16	19
Rarely	29	29
Never	18	19
TOTAL RARELY/NEVER	46	48
Don't know	5	2

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 two-thirds say these guidelines need to be legally enforced.

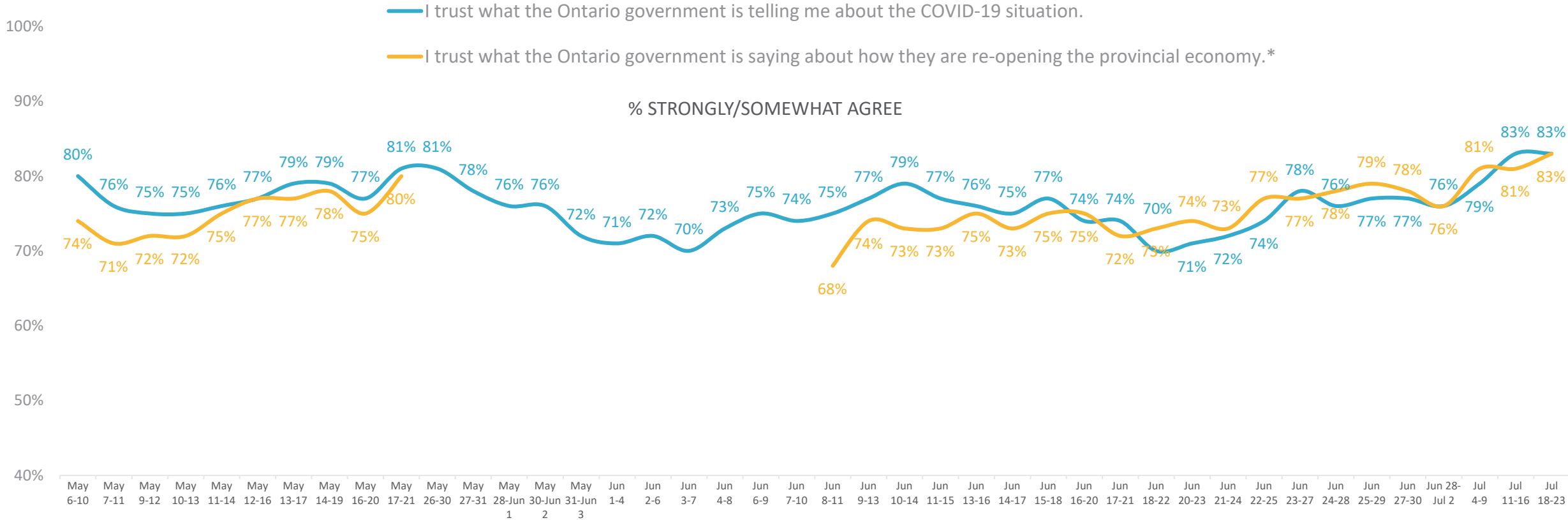
	Jul 11-16	Jul 18-23
n=	100	95
	%	%
Voluntary	43	33
Legally enforced	55	66
Don't know	3	1

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



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

Over the past week, there was a significant increase to its highest level (to 60% from 39%) of Ontarians paying less attention to news or information about COVID-19. Plus, about 70% say they have enough information about the virus. However, only 1-in-4 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	Jul 18-23
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	60
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	70
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	24

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

BUYING ONTARIO MADE PRODUCTS



Ontarians continue to strongly prefer Ontario-made products. If they understand the economic benefits, they are even more pre-disposed to purchase these products. Once they understand the context of buying these products, we may see some boost in purchasing 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	Jul18-23
... the same as a similar non-Ontario made one?	91%	89%
... 5% more than a similar non-Ontario made one?	78%	71%
... 10% more than a similar non-Ontario made one?	65%	60%
... 20% more than a similar non-Ontario made one?	36%	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	Jul 18-23	Change after context provided
... the same as a similar non-Ontario made one?	93%	+2	95%	+6
... 5% more than a similar non-Ontario made one?	83%	+5	86%	+15
... 10% more than a similar non-Ontario made one?	75%	+10	73%	+13
... 20% more than a similar non-Ontario made one?	53%	+17	48%	+12

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