

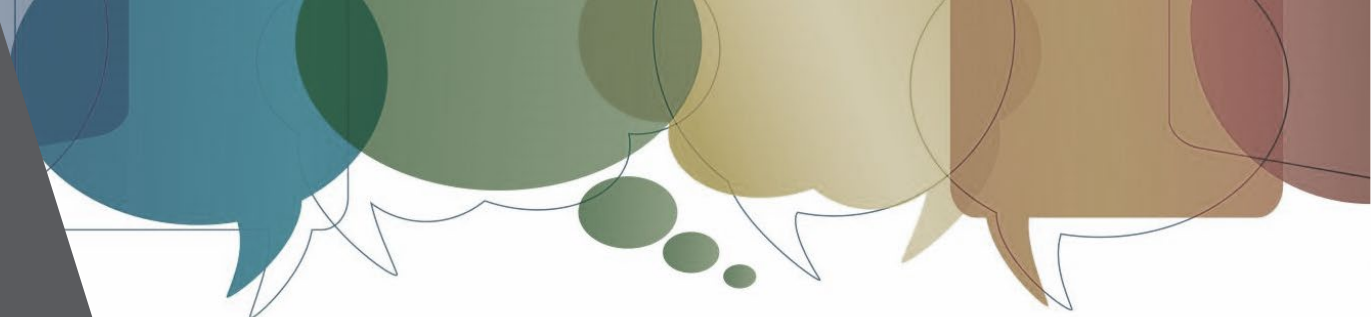


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AUGUST 2020 RESEARCH

PULSE REPORT ON COVID-19 – REPORT #43

CABINET OFFICE

August 14th 2020



KEY FINDINGS

Key Findings

1 Over the past week, the government's 'right track' scores continue to be stable at 78%.

2 Perceptions toward the government's performance on 'ensuring excellent public education' is at its highest point (+24) in over two years. Moreover, the preliminary results indicate that the government is getting a positive rating (+11) on 'managing the re-opening of schools'.

3 The belief that COVID-19 is under control in the province is now at highest point: 66%, up from 36% when we first tracked (May) this perception. And, of course, the gap between Ontario and the rest of world remains wide.

4 Paradoxically, an increasing number (now at 33%, up from 8% in April) of Ontarians feel the government is not doing as much as they should.

One area where Ontarians feel the government is not doing enough: 'planning for the return to school in the fall'.

5 Almost 6-in-10 Ontarians feel the shift to Phase 3 is at the right pace. However, there is a large - but declining - minority (31%) who think the move to Phase 3 has been too quick. Only 9% feel the shift has been moving too slowly.

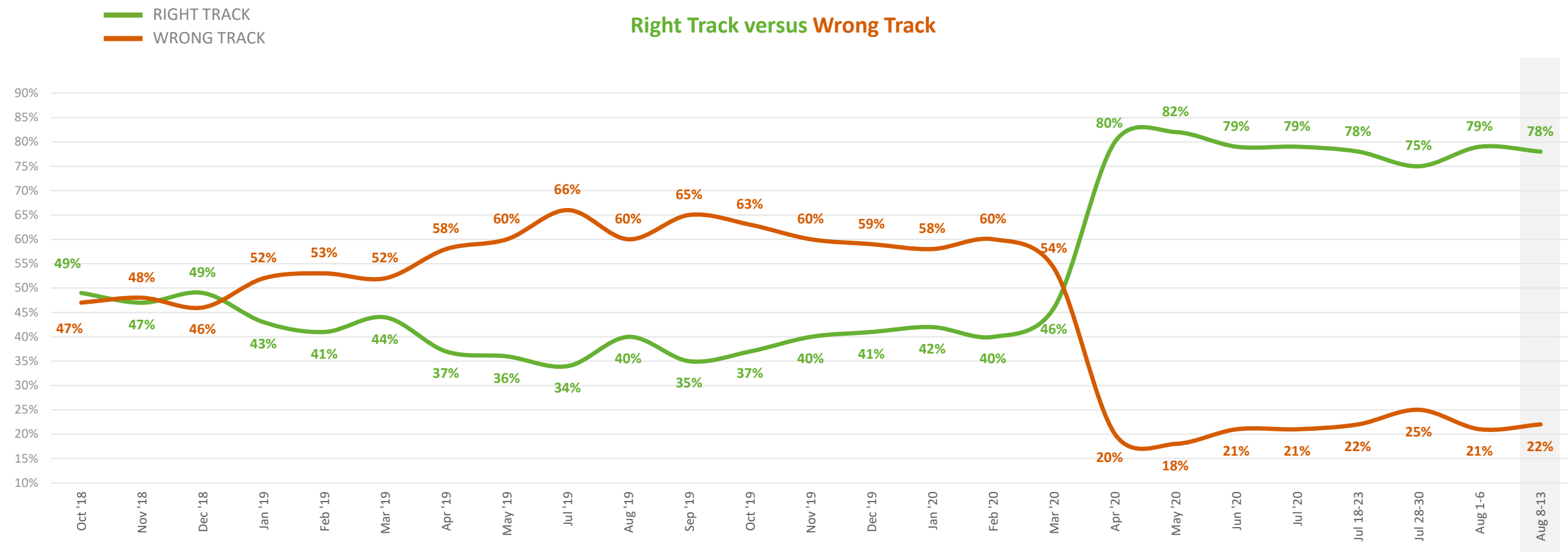
6 There is increasing number of Ontarians (33%, up from 18% in May) who believe that there should be an across the board law requiring everyone to wear a mask when they are outside their home.

Overall, over 8-in-10 continue to want some legal enforcement for mask wearing/face coverings in order to stop the virus spread.

RIGHT TRACK
WRONG TRACK



Over the past week, the government’s ‘right track’ scores have remained stable at 78%.

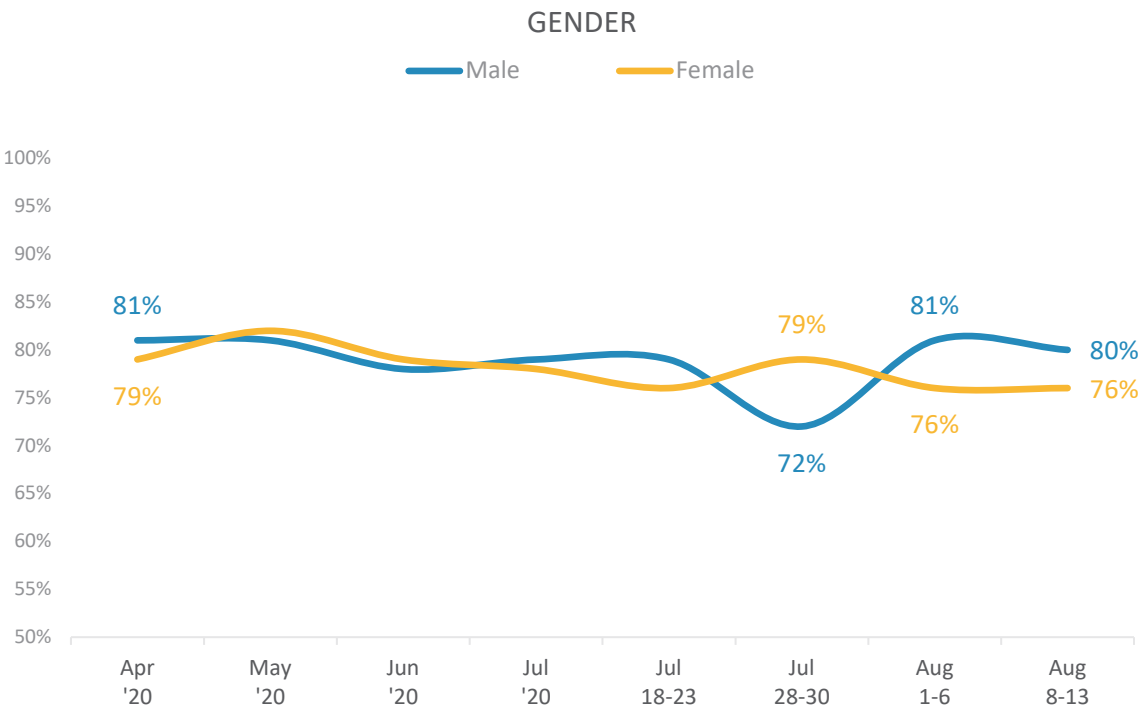
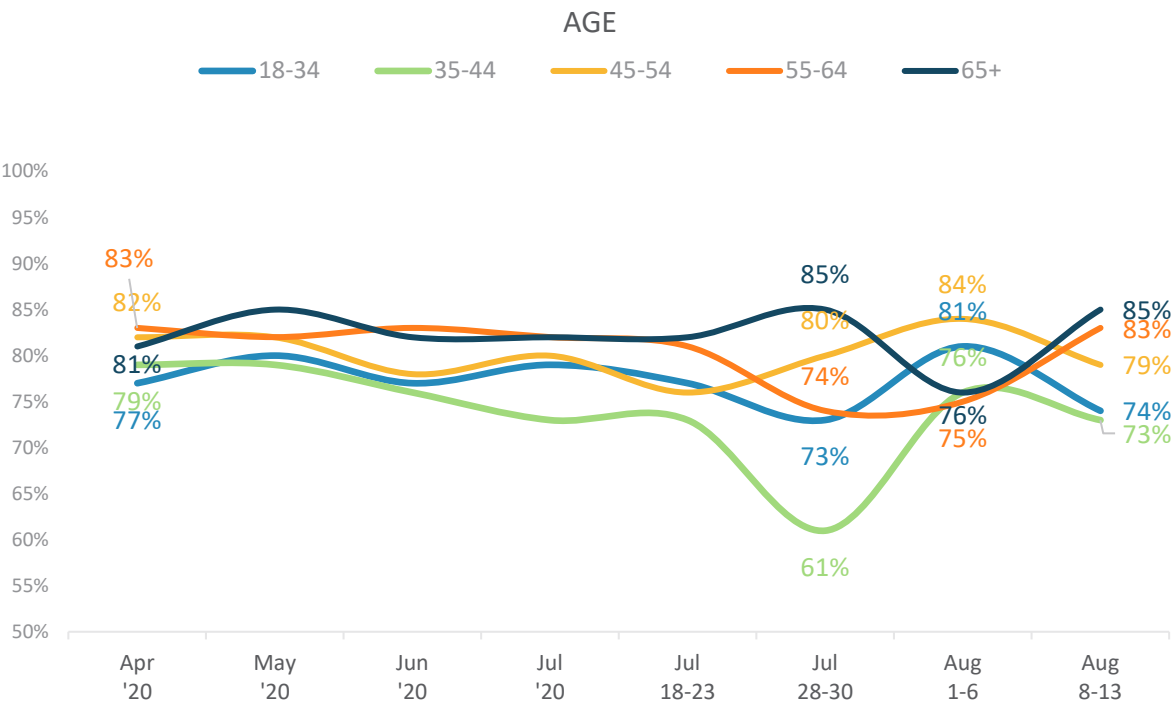


These graphs are based on 4 day roll in order to boost the sample sizes.

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

The ‘right track’ scores are strongest among those aged 55+.

Right Track Scores – 6-Day Roll

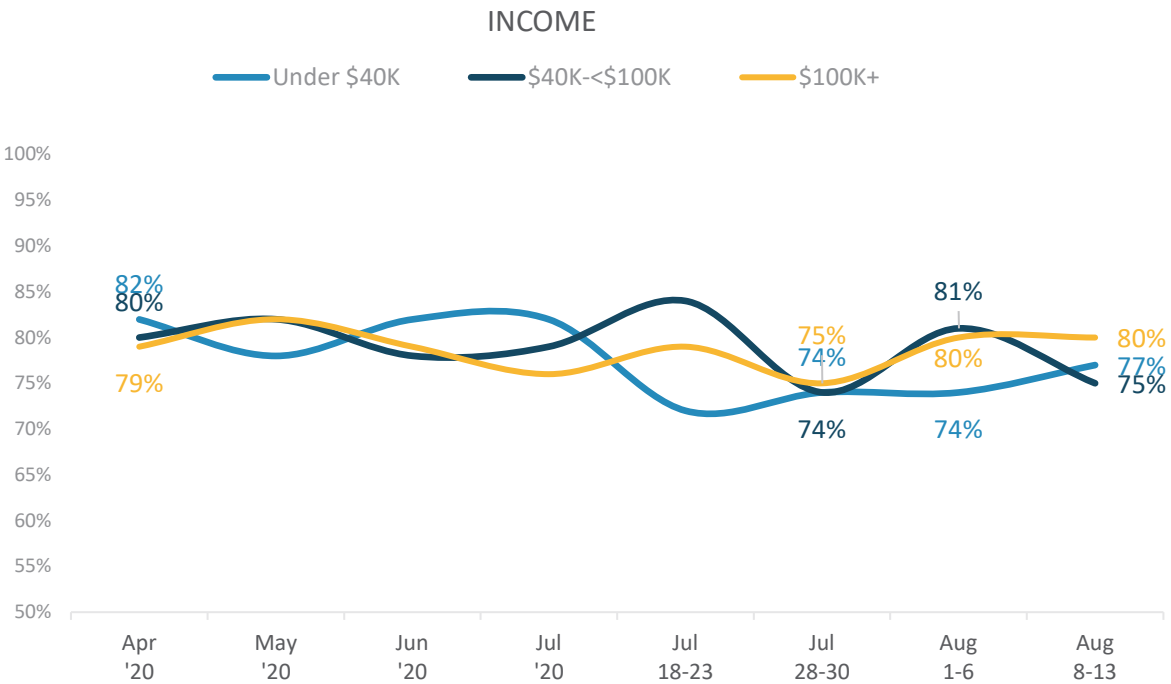
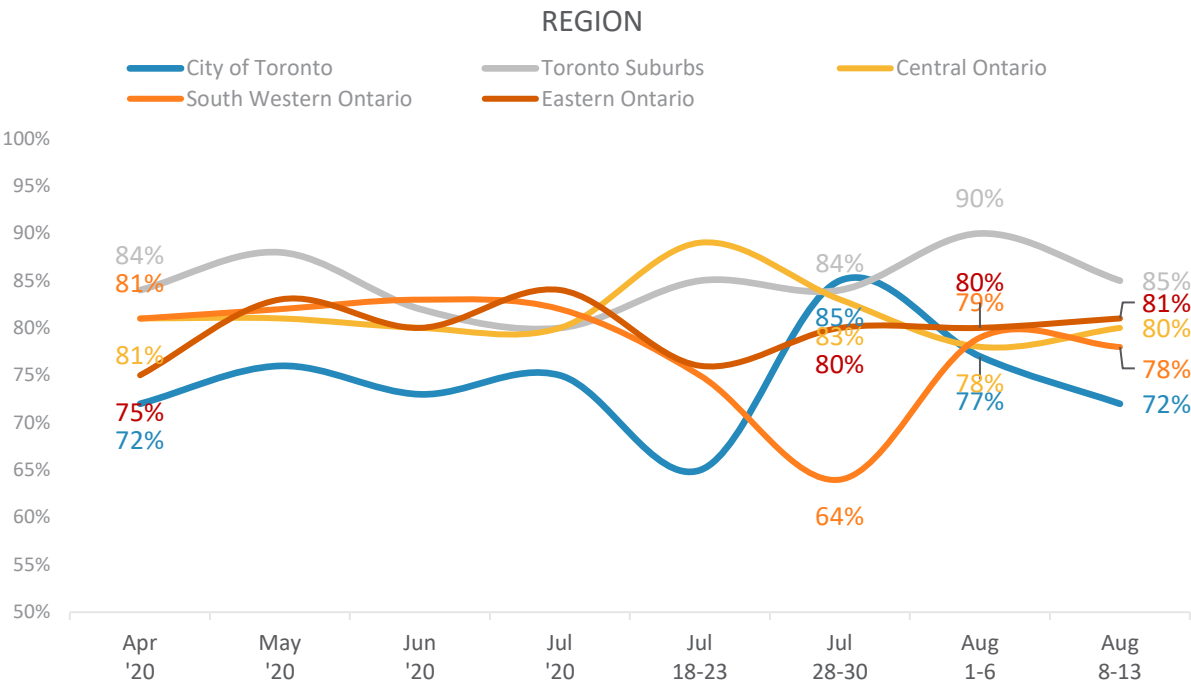


These graphs are based on 5 day roll in order to boost the sample sizes.

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

The ‘right track’ scores are strongest in the Toronto suburbs and weakest in the City of Toronto.

Right Track Scores – 6-Day Roll

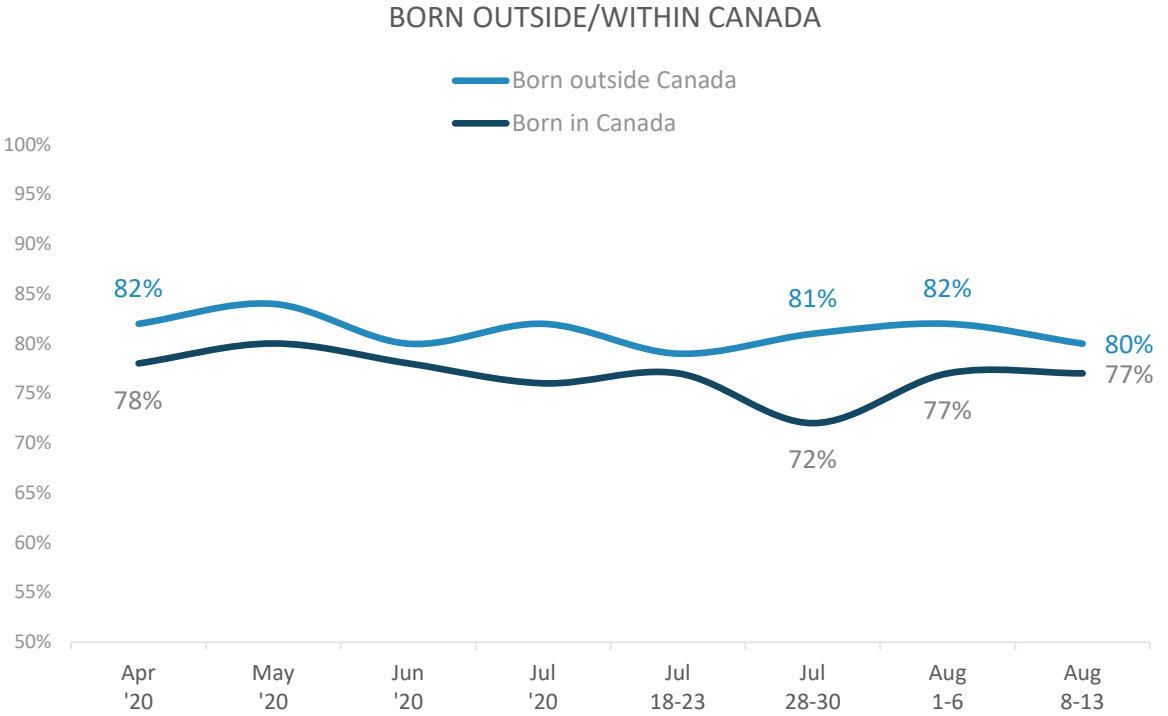
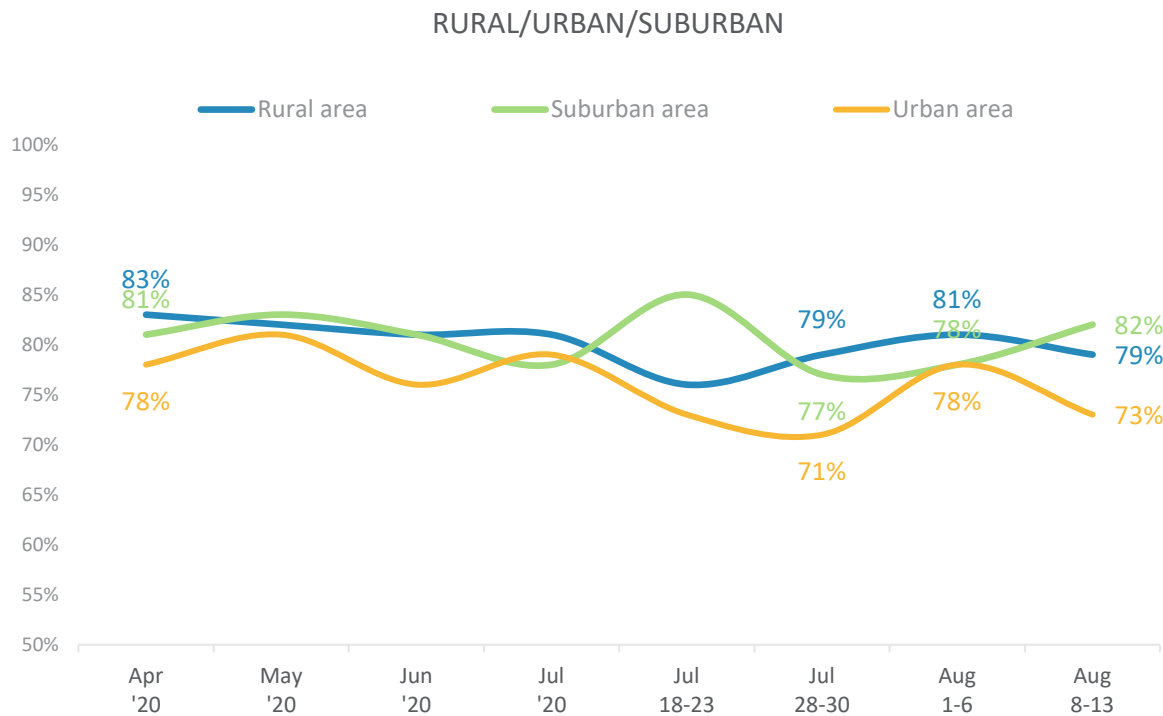


These graphs are based on 5 day roll in order to boost the sample sizes.

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 continue to be slightly higher among those born outside of Canada compared to those born in Canada. These scores are also higher in suburban compared to urban areas.

Right Track Scores – 6-Day Roll



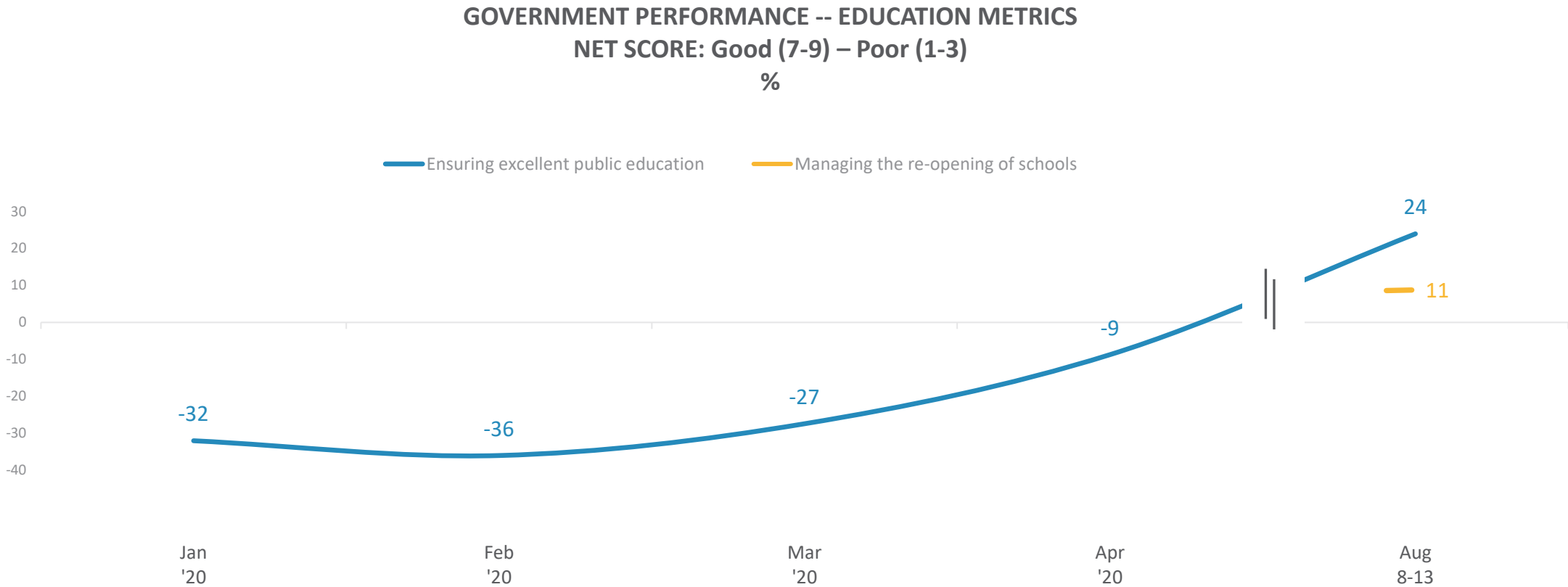
These graphs are based on 5 day roll in order to boost the sample sizes.

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

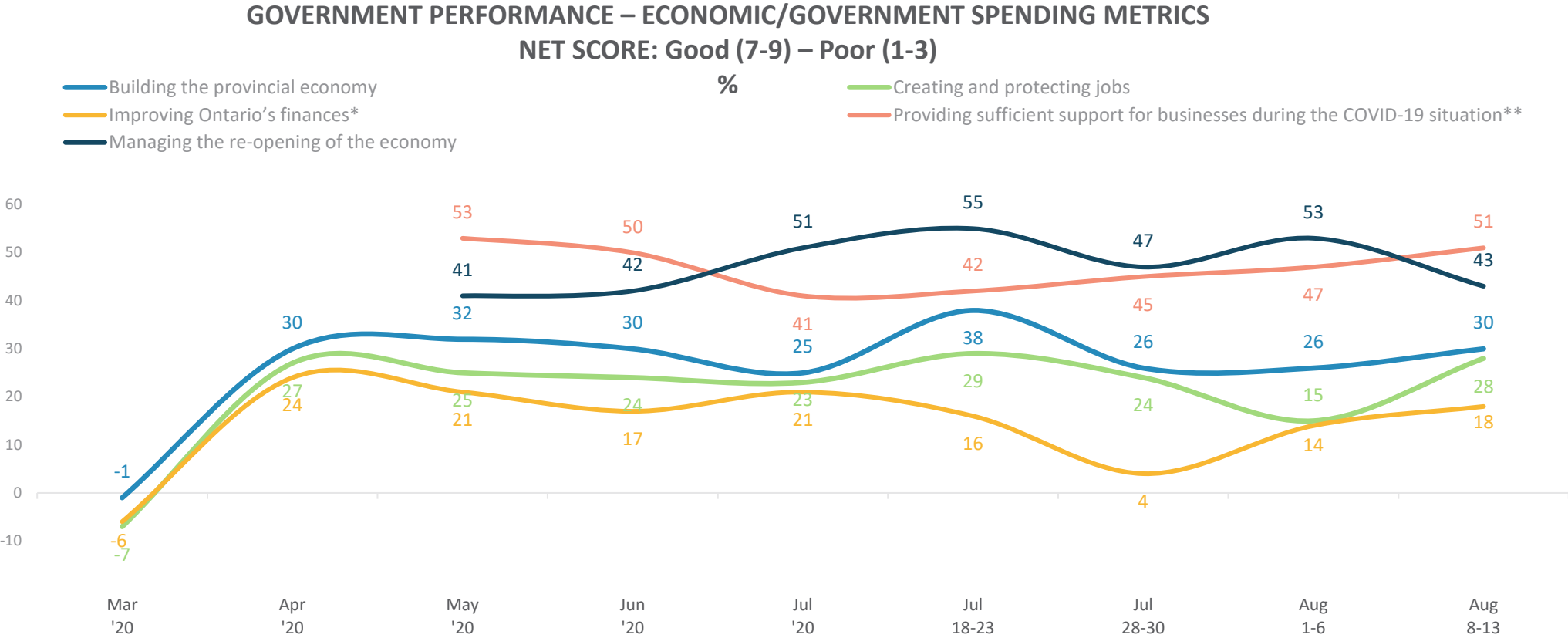


Perceptions toward the government’s performance on ‘ensuring excellent public education’ is at its highest point (+24) in over two years. Moreover, the preliminary results indicate that the government is getting a positive rating (+11) on ‘managing the re-opening of schools’.



Q5. Using a scale where, where 1 means “poor” and nine is “excellent”, how would you rate the performance of Ontario government at managing each of the following? Bases vary

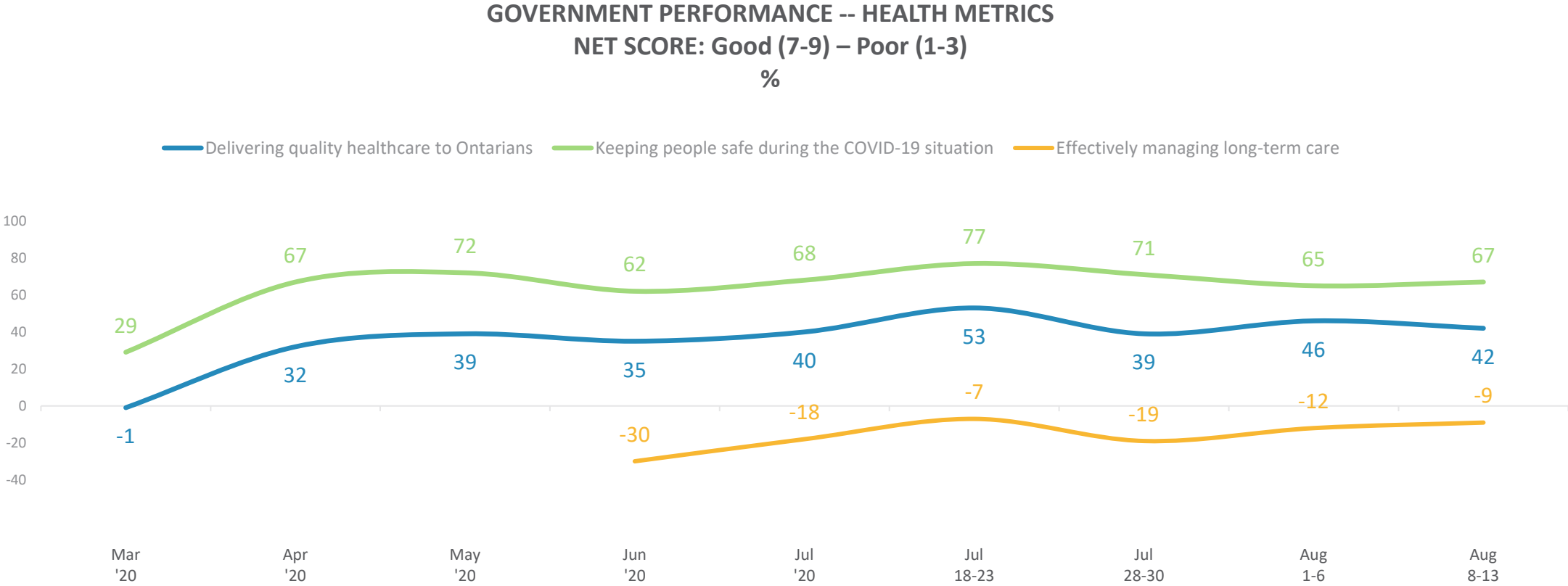
Over the past week, perception of the government’s performance on ‘managing the reopening of the economy’ dipped as the last region was approved to move into Phase 3.



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

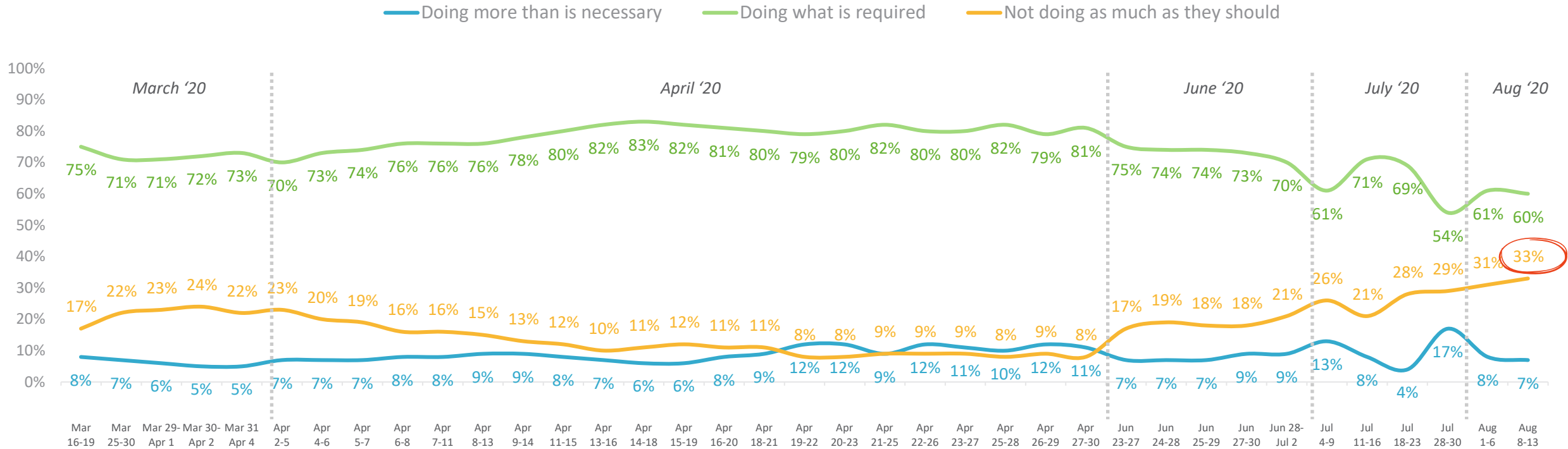
The government’s performance on the three key health metrics remain relatively stable.



Q5. Using a scale where, where 1 means “poor” and nine is “excellent”, how would you rate the performance of Ontario government at managing each of the following? Bases vary

An increased proportion (now at 33%, up from 8% in April) of Ontarians feel the government is ‘not doing as much as they should’.

	Doing more than is necessary				Doing what is required				Not doing as much as they should			
	Jul 18-23	Jul 28-30	Aug 1-6	Aug 8-13	Jul 18-23	Jul 28-30	Aug 1-6	Aug 8-13	Jul 18-23	Jul 28-30	Aug 1-6	Aug 8-13
Right Track	5%	10%	7%	8%	74%	67%	70%	68%	21%	23%	23%	24%
Wrong Track	-	34%	13%	3%	50%	22%	26%	25%	50%	44%	61%	73%



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’ continues to be the one area where many Ontarians feel the government is ‘not doing as much as they should’.

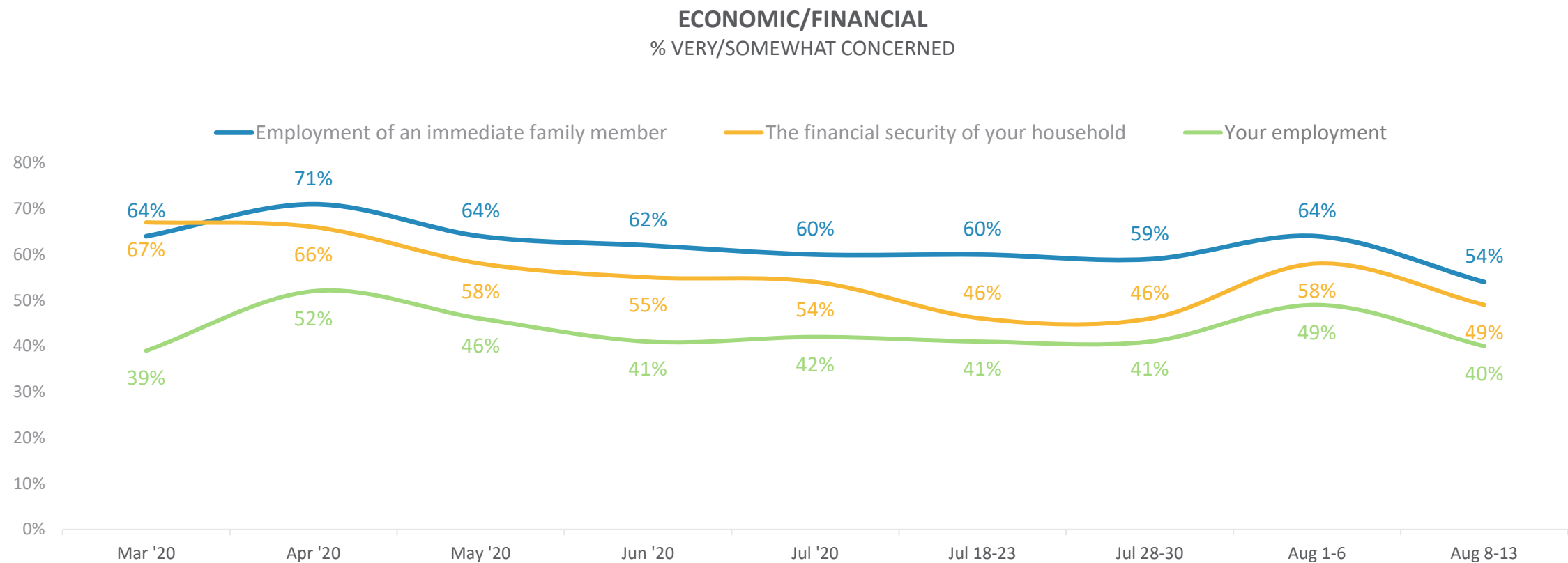
	% DOING MORE THAN IS NECESARY				% DOING WHAT IS REQUIRED				% NOT DOING AS MUCH AS THEY SHOULD			
	Jul 18-23	Jul 28-30	Aug 1-6	Aug 8-13	Jul 18-23	Jul 28-30	Aug 1-6	Aug 8-13	Jul 18-23	Jul 28-30	Aug 1-6	Aug 8-13*
	%	%	%	%	%	%	%	%	%	%	%	%
Advising the public and businesses about the measures they should take to prevent the spread of the virus	10	21	12	19	72	67	70	69	14	10	16	10
Managing the process of gradually re-opening the province	11	11	6	15	71	68	75	70	18	21	13	13
Taking the necessary actions to prevent the spread of the virus	13	10	7	13	68	72	74	70	18	17	15	15
Planning for the return to school in the fall	7	9	6	13	48	37	38	32	35	43	52	50

*It is important to note that much of the interviewing for this COVID-19 Pulse Report was conducted prior to the announcement of increased financial support for boards for school reopening.

CONCERNS ABOUT IMPACT OF COVID-19



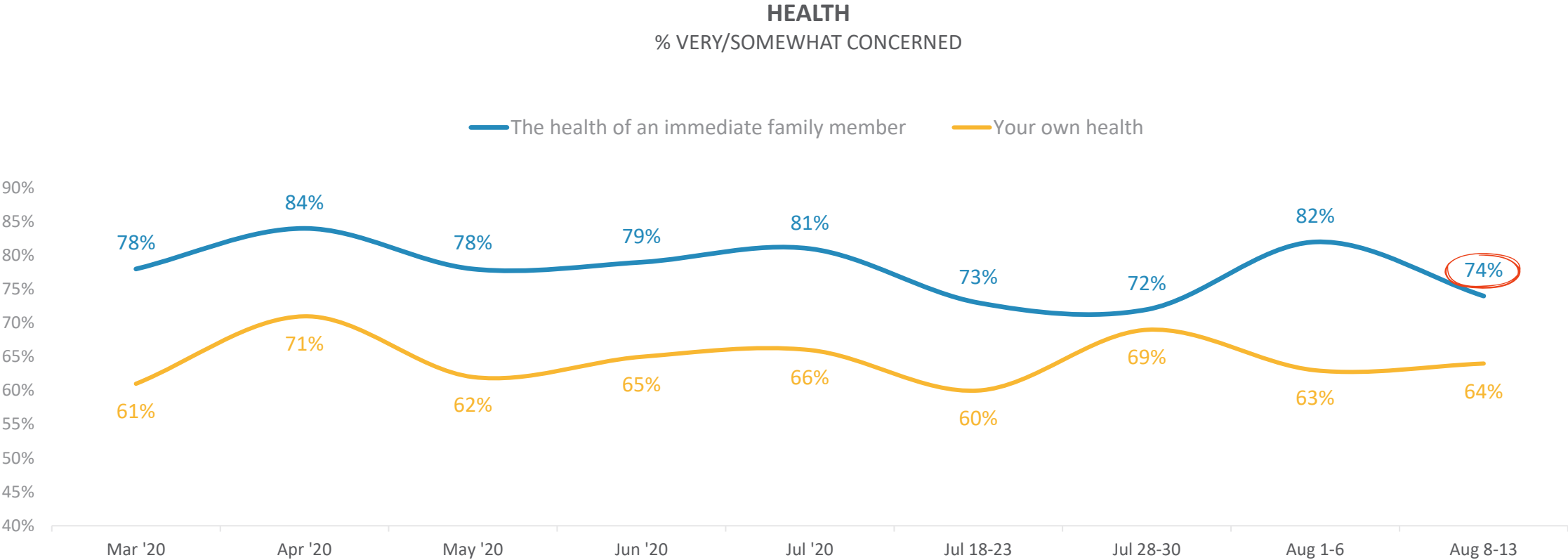
Over the past week, Ontarians’ concern about financial security and employment decreased as all of the province is now fully into Phase 3.



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

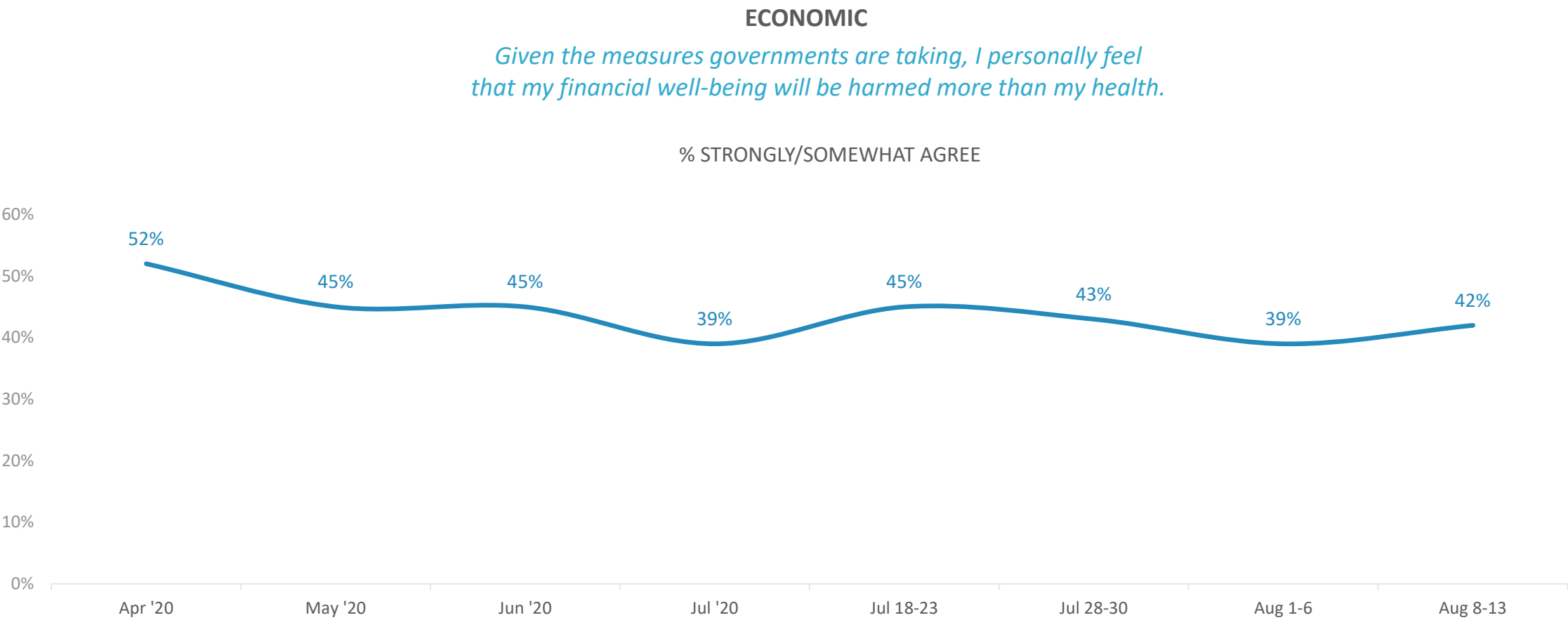
Moreover, concern of Ontarians about the health of an immediate family member continues to be high, but lower compared to last week. Concerns about their own health remain stable.



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.



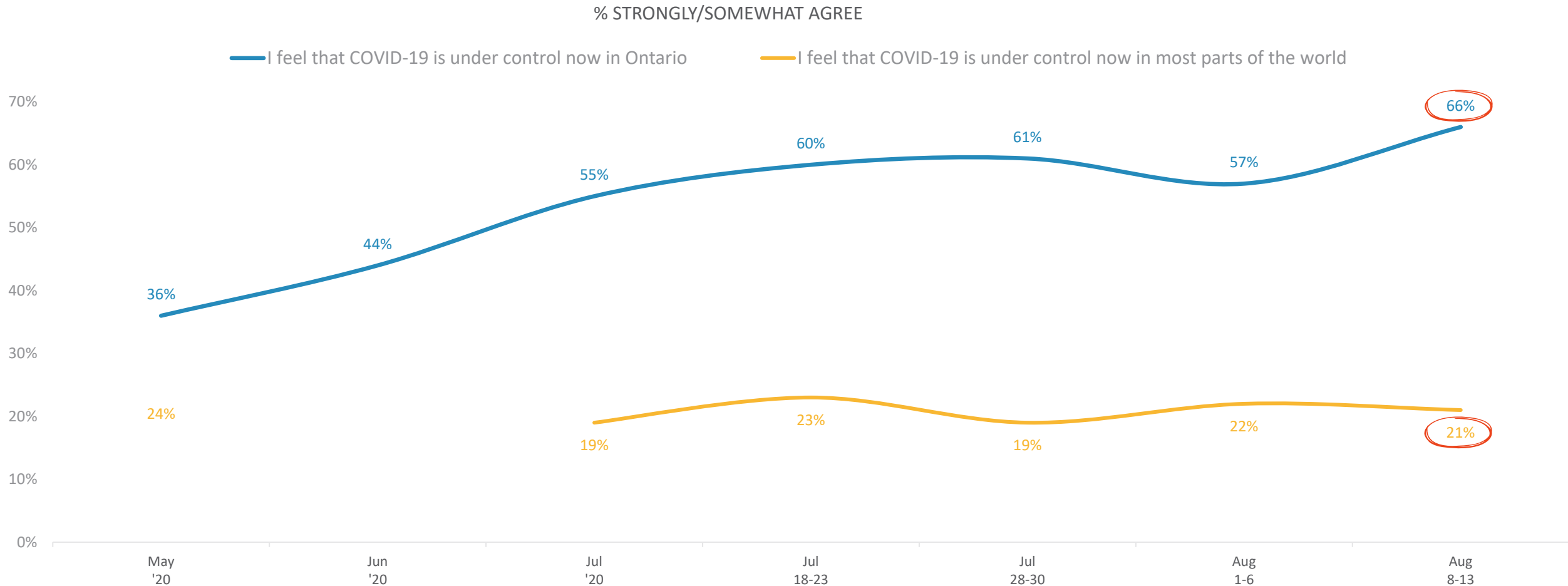
QCV-8B. Do you agree or disagree with each of the following statements about the effects of COVID-19. The first is ...
Base: Total sample, bases vary

COVID-19 RISK TOLERANCE



PERCEPTIONS ABOUT WHETHER COVID-19 IS UNDER CONTROL

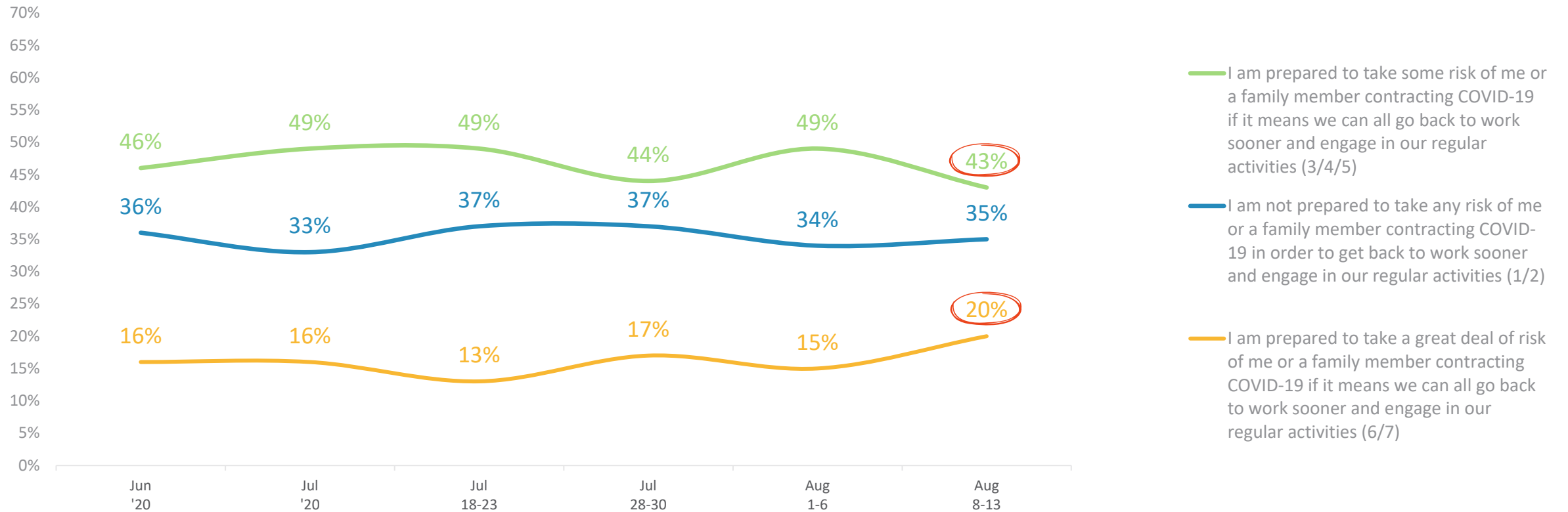
The belief that COVID-19 is under control in the province is now at its highest point: 66%, up from 36% when we first tracked this perception. And, of course, the gap between Ontario and the rest of world remains wide.



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

About 63% continue to be prepared to take at least 'some risk' to get back to work or regular life, while over one-third are 'not prepared to take any risk'.



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)

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MOVING TO PHASE 3 – PACE OF THE SHIFT

Almost 6-in-10 Ontarians continue to feel the shift to Phase 3 is at the right pace. However, there is a large - but declining - minority (31%) who think the move to Phase 3 has been too quick. Only 9% feel the shift has been moving too slowly.

	Jul 18-23	Jul 28-30	Aug 1-6	Aug 8-13
n=	300	300	260	310
	%	%	%	%
Moving too quickly	37	39	33	31
At the right pace	56	52	58	58
Moving too slowly	6	8	5	9
Prefer not to answer/Don't know	1	1	4	2

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

As the province entered into 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 RISKY				% VERY/SOMEWHAT RISKY				Phase 3 Activities – Tiers of Perceived Risk
	Jul 18-23	Jul 28-30	Aug 1-6	Aug 8-13	Jul 18-23	Jul 28-30	Aug 1-6	Aug 8-13	
n=	300	300	260	310	300	300	260	310	
	%	%	%	%	%	%	%	%	
Going inside to an indoor bar	70	69	56	63	92	90	88	94	Higher
Going to a casino	68	77	66	76	91	92	95	90	
Working out in a gym	51	50	55	48	90	86	91	84	Medium
Eating at an indoor restaurant	42	37	43	33	85	87	87	87	
Going to a wedding	42	51	50	51	86	89	91	87	
Sending children to school	42	42	47	49	86	84	86	87	
Sending children to a daycare	39	41	42	47	85	87	86	81	
Returning to work at an office	17	17	23	20	74	73	78	70	Lower
Eating on a restaurant patio	7	7	8	10	53	61	59	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

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Almost 8-in-10 consistently say they are trying their best to get back to living a normal life, and 71% (the highest point) say the threat of contracting COVID-19 is much less now than it was in mid-June.

- About 73% say that they see people not following the social distancing guidelines.

% 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	Jul 28-30	Aug 1-6	Aug 8-13
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	56	60	71
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	72	78	79
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	71	67	73

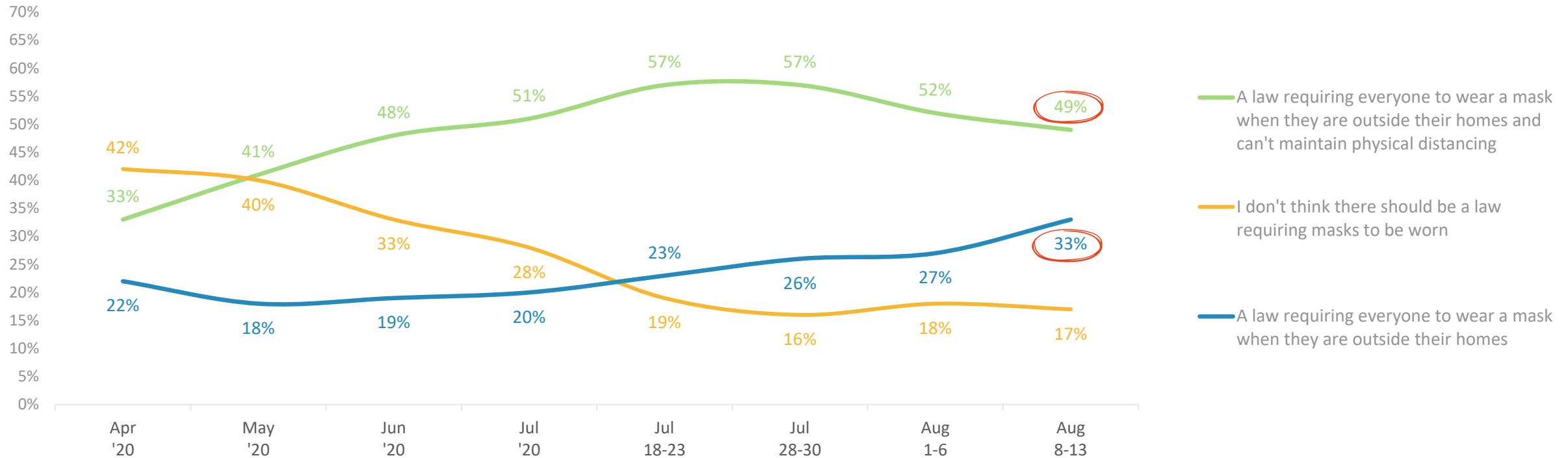
QCV-14. To what extent do you agree or disagree with the following statements about
Base: Total sample

MASK WEARING PERCEPTIONS



An increasing number of Ontarians would like some level of legal codification of face mask wearing: over 8-in-10 continue to want some legal enforcement for this way of stopping the virus spread.

- There is an increasing number of Ontarians (33%) who believe that there should be an across the board law requiring everyone to wear a mask when they are outside their home.



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

Base: Total sample

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FREQUENCY OF FACE MASK WEARING

Wearing masks/face coverings has reached its highest point since we started to track this behavior in mid-June. About 81% say they wear a mask ‘all of the time’ or ‘most of the time’. About 56% (its highest point) claim they are wearing a face mask ‘all of the time’ when away from home.

	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	Jul 28-30	Aug 1-6	Aug 8-13
n=	313	400	400	410	410	410	410	410	410	300	300	300	300	260	310
	%	%	%	%	%	%	%	%	%	%	%	%	%	%	%
TOTAL ALL/MOST OF THE TIME	52	52	52	52	54	55	58	58	60	60	72	76	77	73	81
All of the time	26	27	27	23	25	25	25	29	29	22	45	42	47	48	56
Most of the time	26	25	26	29	29	31	33	29	32	38	27	34	29	24	25
Some of the time	26	26	28	28	26	25	24	26	24	20	20	17	15	17	13
Rarely	19	18	15	17	17	16	15	12	13	18	5	7	7	9	5
Never	4	3	4	3	3	4	3	3	3	3	2	1	1	1	1
RARELY/NEVER	23	21	20	20	20	20	18	15	16	21	7	8	8	10	6

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 or covering?

Base: Total sample

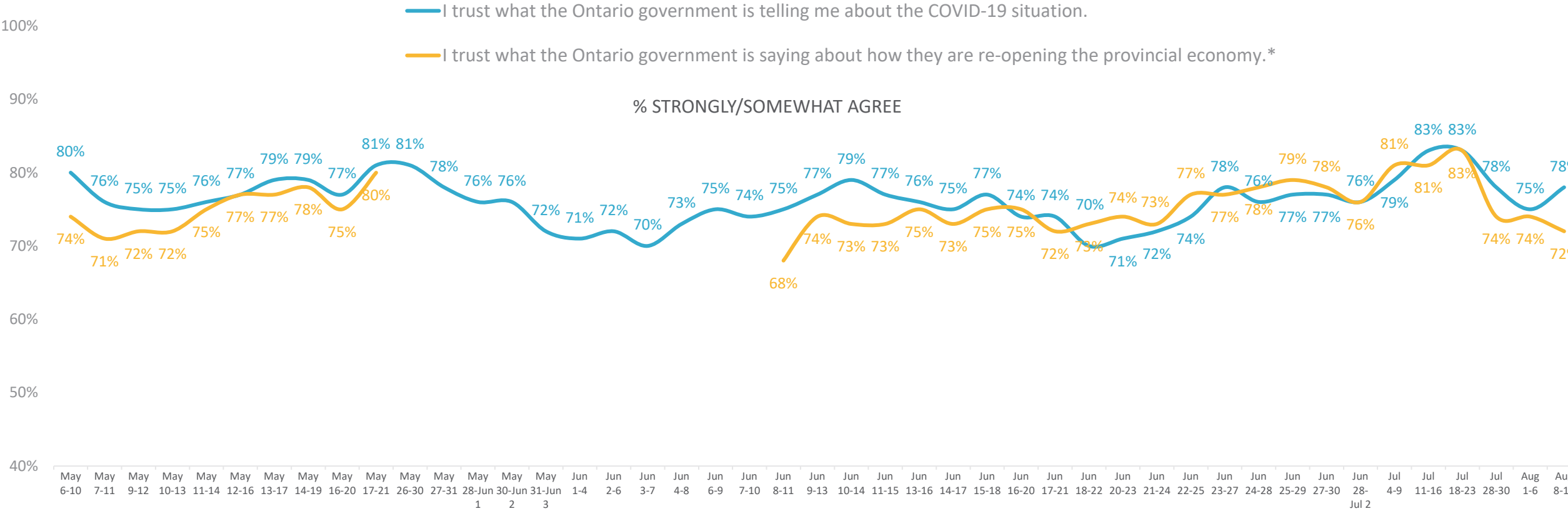
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CONFIDENCE IN GOVERNMENT COVID-19 MESSAGING



TRUST IN THE GOVERNMENT’S COMMUNICATIONS ABOUT COVID-19

Ontarians have slightly more trust in the government’s messaging about the general COVID-19 situation compared to the messaging related to 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

CONSUMER
CONFIDENCE
DURING PHASE 3



Ontarians say they are much less likely to spend now compared to early June despite the province moving into Phase 3 of the economy re-opening.

EXPECTED SPENDING BEHAVIOUR AS THE ECONOMY SHIFTS INTO PHASE 3

	Jul 28-30	Aug 1-6	Aug 8-13
n=	300	260	310
	%	%	%
Spending more than you would normally	14	15	20
Spending about as much as you would normally	40	29	35
Spending less than you would normally	45	54	43
Don't know	2	2	2

EXPECTED SPENDING BEHAVIOUR AS THE ECONOMY OPENS UP

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

QCV111. And Ontario shifts into Phase 3 of the re-opening of the economy, do you anticipate that, for this time of year, you will be ...

Base: Total sample

QCV-81. And as the economy starts to reopen again do you anticipate that, for this time of year, you will be ...

Base: Total sample

VACCINATIONS



LIKELIHOOD OF OBTAINING A COVID-19 VACCINATION

Just over 1-in-2 (54%) continue to say they would be ‘very’ likely be vaccinated when a vaccine is available, while another 21% say they would be ‘somewhat’ likely. About 1-in-5 say they are not likely to be vaccinated.

	Jul 28-30	Aug 1-6	Aug 8-13
n=	300	260	310
	%	%	%
TOTAL LIKELY	81	74	75
Very likely	55	52	54
Somewhat likely	26	22	21
Not very likely	8	9	7
Not likely at all	10	16	15
TOTAL NOT LIKELY	19	25	21
Not sure/Don't know	1	1	4

QCV112. If and when a vaccine for COVID-19 is developed, how likely are you to get vaccinated ... (or should we ask in context of yourself and other family members ... wondering if some people might not have children under the age of 16-18 vaccinated).

Base: Total sample

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LIKELIHOOD OF OBTAINING A COVID-19 VACCINATION FOR THEIR CHILDREN IF THEY HAVE CHILDREN UNDER AGE OF 18

Similarly, 1-in-2 (50%) parents with children under the age of 18 are ‘very’ likely to have them vaccinated. Still, about 1-in-4 indicate they are not likely to have their children vaccinated.

	Jul 28-30	Jul 28-30*	Aug 1-6	Aug 1-6*	Aug 8-13	Aug 8-13*
n=	300	207	260	174	310	204
	%	%	%	%	%	%
TOTAL LIKELY	55	79	49	73	47	71
Very likely	39	56	35	52	33	50
Somewhat likely	16	23	14	21	14	21
Not very likely	6	9	6	9	6	9
Not likely at all	7	10	10	14	10	15
TOTAL NOT LIKELY	13	19	16	23	16	24
Don't have children under 18	31	-	33	-	32	
Not sure/Don't know	1	-	2	-	5	

*Respondents who indicate that they have children under the age of 18 in their households.
 QCV113. And if you are a parent of children under the age of 18, how likely are you to have them vaccinated?
 Base: Total sample

GROUPS WHO SHOULD BE REQUIRED TO BE VACCINATED

‘Health care workers’, ‘migrant workers’, ‘travellers entering Canada’, and ‘residents of long-term care facilities/retirement homes’ should be required to be vaccinated once a vaccine is readily available.

% Yes	Jul 28-30	Aug 1-6	Aug 8-13	
n=	300	260	310	
	%	%	%	Tiers
All health care workers	76	74	68	Higher
All migrant workers coming into Ontario	76	69	67	
Anyone crossing the border from the U.S. into Canada	74	67	66	
People living in long-term care facilities and retirement homes	72	75	65	
Seniors	66	60	59	Middle
Anyone working in a customer-facing job (e.g., restaurant workers, cashiers, etc.)	63	58	67	
School-age children, aged 4 to 17	61	65	66	
Children in day care facilities	61	59	63	
Children of all ages, from infants to youth	53	53	54	Lower
Anyone over the age of 18	52	56	48	

QCV114. Once a vaccine becomes widely available, do you think it should be mandatory for each of the following groups:

Base: Total sample

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ELECTRICITY PRICING



A slight majority continue to prefer a variable rate approach for electricity pricing compared to the fixed option. Among those who review their electricity bill closely, about 6-in-10 continue to opt for the variable scenario.

- Both of the groups who think the government is on the ‘right’ and ‘wrong’ track continue to prefer the variable approach, although those on the ‘wrong track’ have a stronger preference for the variable option.

	Jul 28-30	Aug 1-6	Aug 8-13
n=	300	260	310
	%	%	%
A variable rate, meaning that you would pay a higher price on weekdays and lower on evenings, weekends and holidays, which allows consumers a way to manage their electricity costs if they choose to	57	58	52
Pay a fixed rate, meaning that you would pay the same price at all hours of the day, which provides consumers with a predictable way to pay for electricity	43	42	48

	Don't even look at it			Glance at the electricity bill			Review electricity bill in detail		
	July 28-30	Aug 1-6	Aug 8-13	July 28-30	Aug 1-6	Aug 8-13	July 28-30	Aug 1-6	Aug 8-13
	%	%	%	%	%	%	%	%	%
Variable Rate	57	60	49	50	56	52	60	58	58
Fixed Rate	43	40	51	50	44	48	40	42	42

Overall, Ontarians continue to have a positive view on the performance of the government on managing electricity prices for Ontario consumers. On this consideration, positive or negative feelings are not particularly strong.

	Jul 28-30			Aug 1-6			Aug 8-13		
n=	300			260			310		
	%			%			%		
TOTAL RIGHT TRACK	63			58			56		
Strongly right track	15			13			17		
Somewhat right track	47			45			40		
Somewhat wrong track	13			19			16		
Strongly wrong track	18			14			18		
TOTAL WRONG TRACK	30			34			34		
NET SCORE (RIGHT MINUS WRONG TRACK)	+33			+24			+22		
Don't know/Not sure	7			8			10		
	Don't even look at it			Glance at the electricity bill			Review electricity bill in detail		
	July 28-30	Aug 1-6	Aug 8-13	July 28-30	Aug 1-6	Aug 8-13	July 28-30	Aug 1-6	Aug 8-13
	%	%	%	%	%	%	%	%	%
Net Score	+49	+30	+13	+50	+24	+37	+7	+21	+18

QEP-3. In your view, when it comes to managing electricity prices for Ontario’s consumers, would you say the Government of Ontario is generally on the right track or the wrong track? (PROBE: Would you say the government is strongly or somewhat on the [right/wrong] track?)

Base: Total sample

INTERNATIONAL STUDENTS



Most Ontarians believe that international students paying more in tuition than domestic students make a significant contribution to Ontario universities and colleges.

Because international students pay far more in tuition fees than domestic students they make a significant financial contribution to Ontario universities and colleges.

	Aug 1-6	Aug 8-13
n=	varies	
	%	%
TOTAL AGREE	74	72
Strongly agree	43	50
Somewhat agree	31	22
Neither agree nor disagree	10	10
Somewhat disagree	6	10
Strongly disagree	4	5
TOTAL DISAGREE	10	15
Not applicable	3	<1
Not sure/Don't know	3	3

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

About 1-in-2 believe that the federal government should allow international student into Ontario to study during the COVID-19 pandemic.

The federal government should allow international students into Ontario to study this year during the COVID-19 pandemic.

	Aug 1-6	Aug 8-13
n=	varies	
	%	%
TOTAL AGREE	51	50
Strongly agree	25	27
Somewhat agree	26	23
Neither agree nor disagree	8	9
Somewhat disagree	20	13
Strongly disagree	19	23
TOTAL DISAGREE	39	37
Not applicable/Not sure/Don't know	1	4

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

Most Ontarians believe that international students should be allowed to enter Ontario to study if they have taken a COVID-19 test or quarantine for 14 days upon arrival.

International students should be allowed into Ontario to study if they are first tested for COVID-19 or quarantine for 14 days upon arrival.

	Aug 1-6	Aug 8-13
n=	varies	
	%	%
TOTAL AGREE	85	77
Strongly agree	56	56
Somewhat agree	28	21
Neither agree nor disagree	3	7
Somewhat disagree	6	7
Strongly disagree	3	8
TOTAL DISAGREE	9	15
Not applicable/Not sure/Don't know	3	2

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