

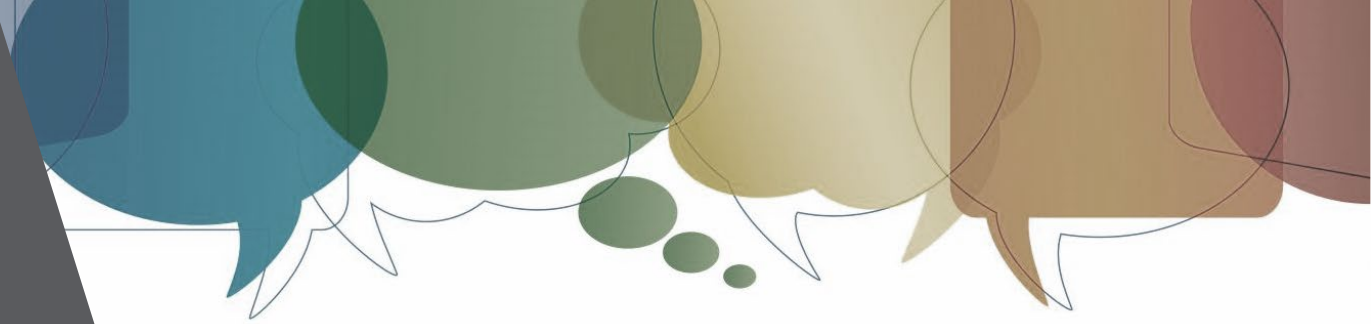


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SEPTEMBER 2020 RESEARCH

PULSE REPORT ON COVID-19 – REPORT #44

CABINET OFFICE

August 21st 2020



KEY FINDINGS

Key Findings

1 Over the past week, the government's 'right track' scores have softened to 74%. 'Strongly right track' has weakened as well.

2 Not surprisingly, 'COVID-19' continues to dwarf all issues in terms of what Ontarians want from their government. In response to the media coverage on school re-opening, 'education' has increased slightly as a priority.

3 Mirroring the softening 'right track' scores, perceptions toward the government's performance on education metrics have weakened over the past week. Ratings for 'ensuring excellent public education' and 'managing the re-opening of schools' have softened.

4 Perceptions toward the government's performance on 'managing the reopening of the economy' and 'providing sufficient support for businesses' have softened. Despite the announcement of a much larger deficit, perceptions on 'improving Ontario's finances' have improved over the past week.

5 At this point of the COVID-19 pandemic, Ontarians' top concerns are the health impact of the schools re-opening and a possible second wave of COVID-19. The increased size of the provincial deficit is perceived as a lessor concern.

6 Preliminary results indicate most Ontarians agree that it was necessary to double the provincial deficit to fight COVID-19. And, the strength of the agreement ('very' necessary) is strong.

Plus, early results indicate that Ontarians are divided on the state of the economy: 43% feel the economy is not worsening, but it is not getting better; while 44% say that the economy is starting to recover. Only 10% feel the economy is getting worse.

Key Findings

7 Preliminary results suggest that Ontarians are divided over whether they are confident about the economic recovery over the next year.

These early results also show that Ontarians are very cautious about the expected length of an economic recovery: about 55% expect it will take at least 24 months for the economy to recover.

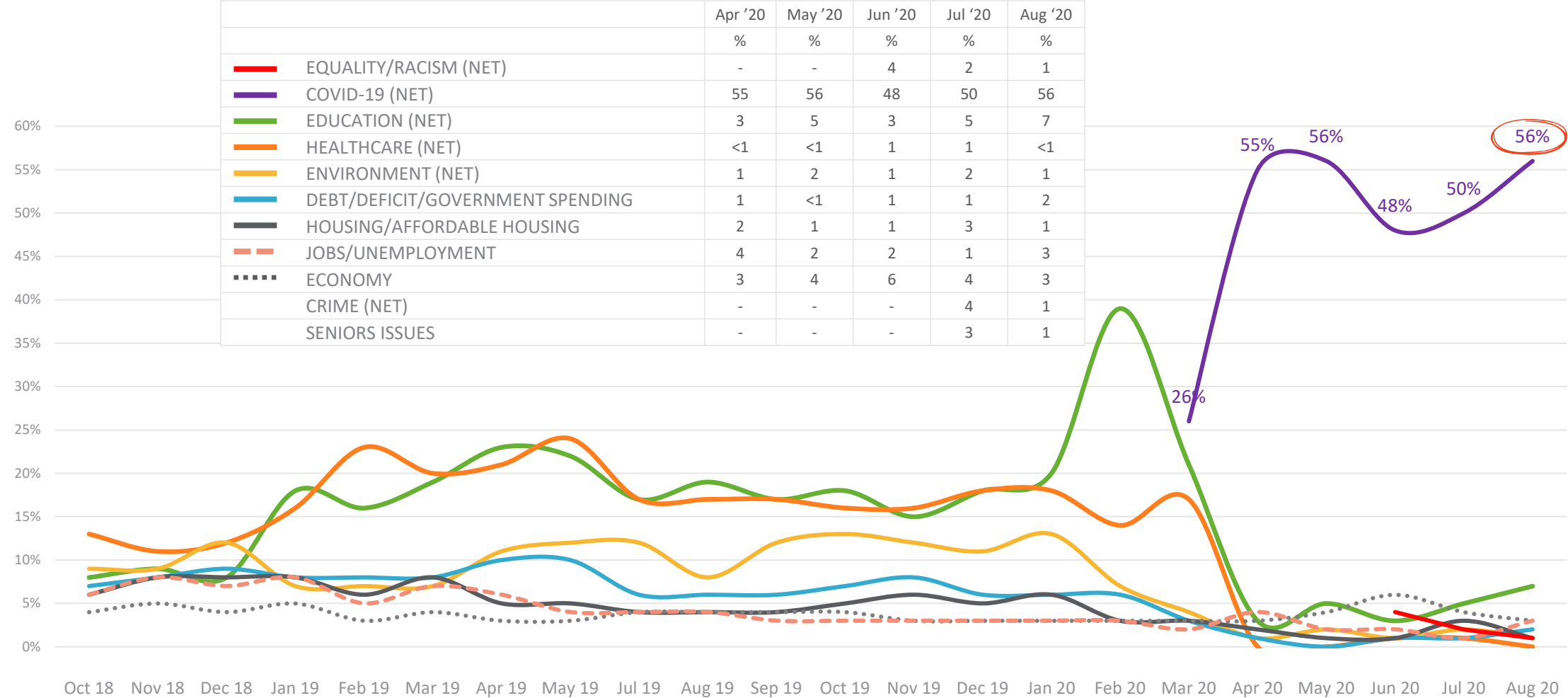
8 Ontarians' cautious views about the economic recovery help to explain why they continue to say they are much less likely to spend now compared to early June despite the province moving into Phase 3 of the economy re-opening.

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. In response to the media coverage on school re-opening, ‘education’ has increased slightly as a priority.



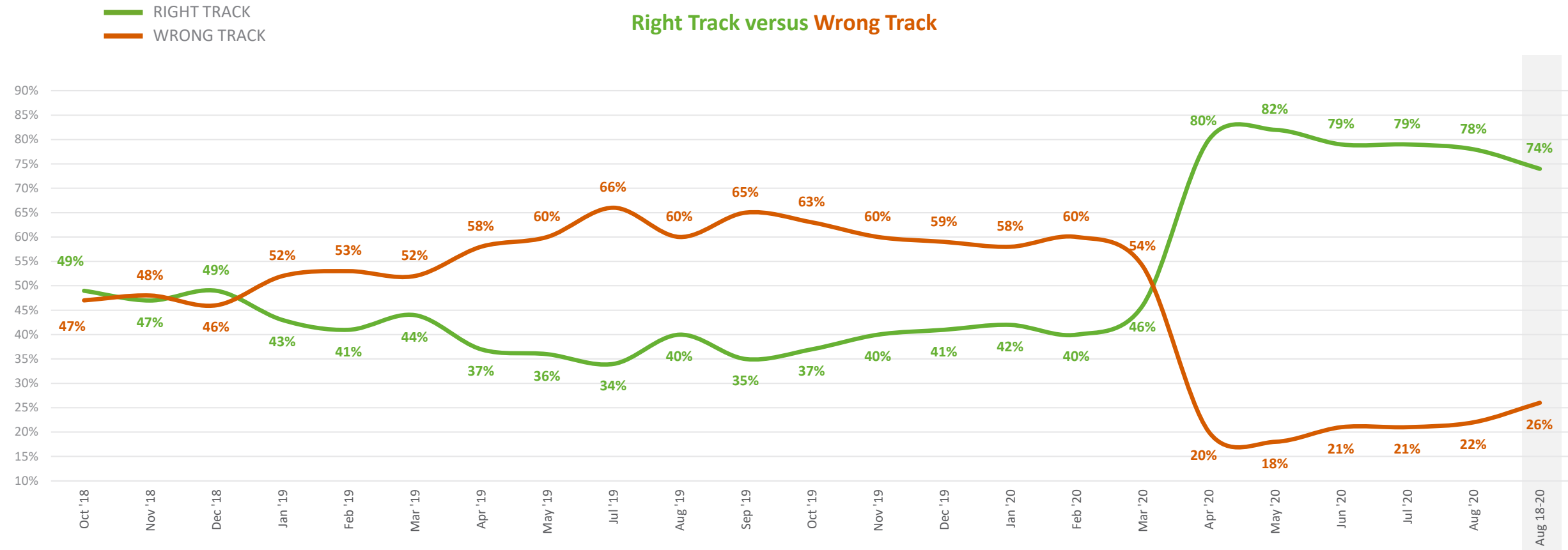
Q1. Thinking about the issues presently facing Ontario, which ONE do you feel should receive the GREATEST attention from the Ontario provincial government? That is, what should be the top priority?

RIGHT TRACK
WRONG TRACK



Over the past week, the government’s ‘right track’ scores have softened to 74%. ‘Strongly right track’ has weakened as well.

	Mar'20	Apr'20	May'20	Jun'20	Jul'20	Aug'20	Aug 18-20
'Strongly' Right Track	12%	31%	32%	27%	28%	28%	23%

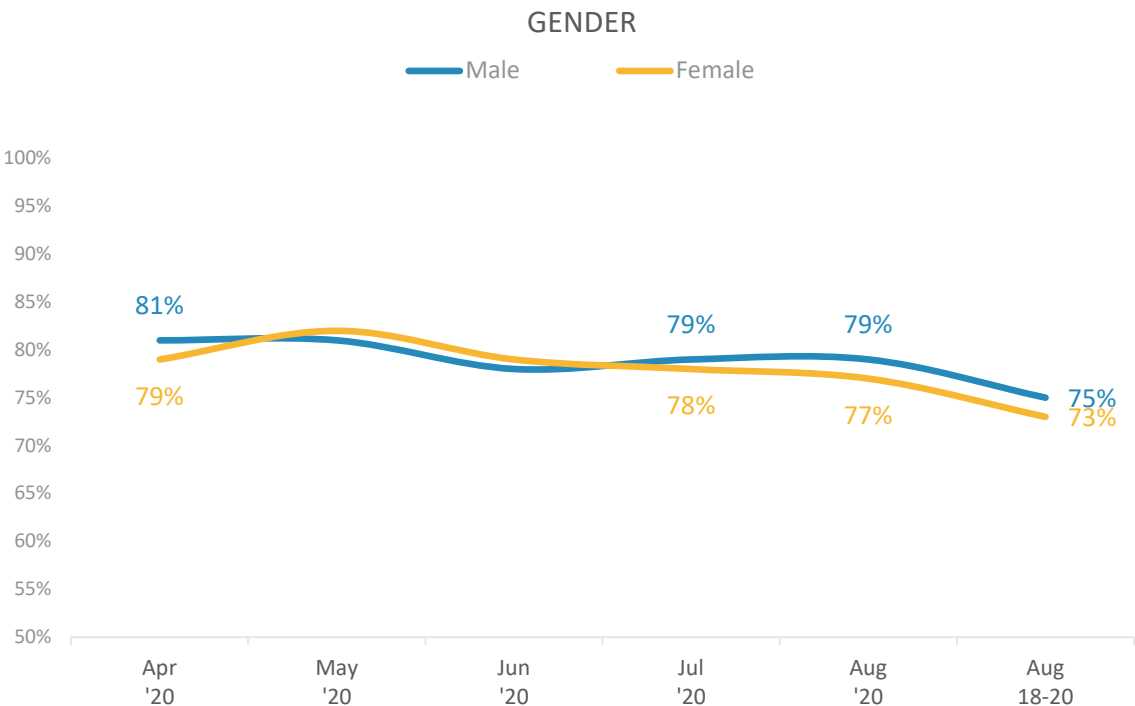
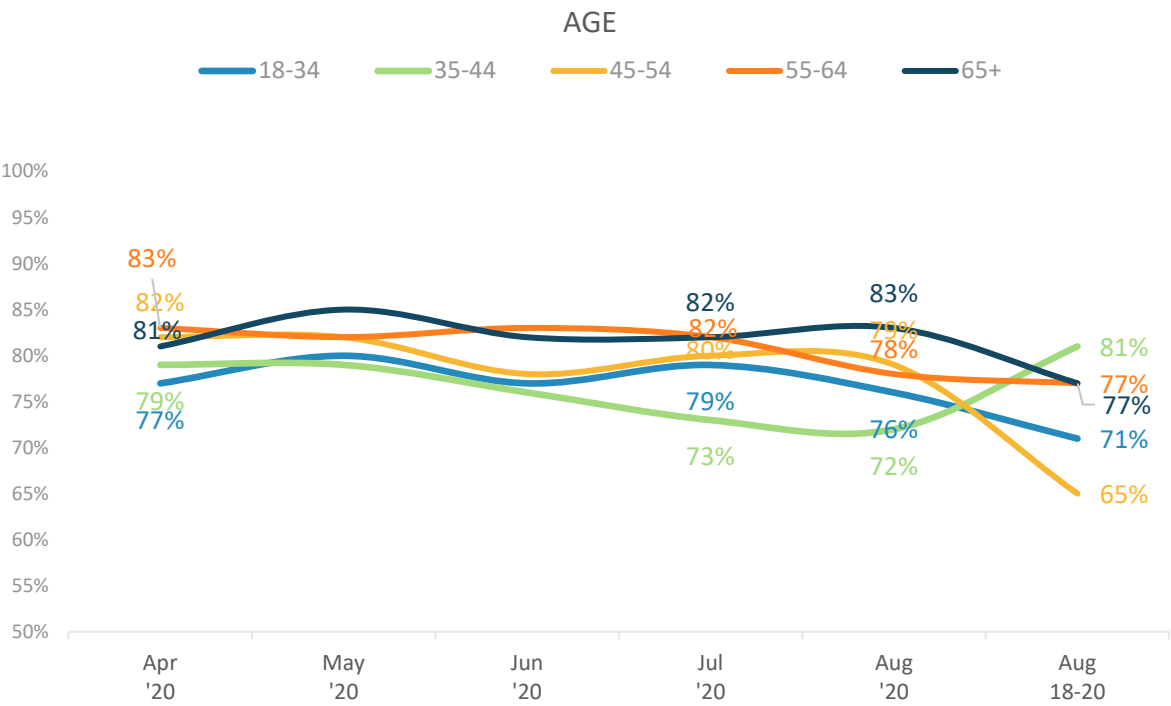


These graphs are based on 4 day roll in order to boost the sample sizes.

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 softer among all age groups except for those aged 35-44.

Right Track Scores – 6-Day Roll

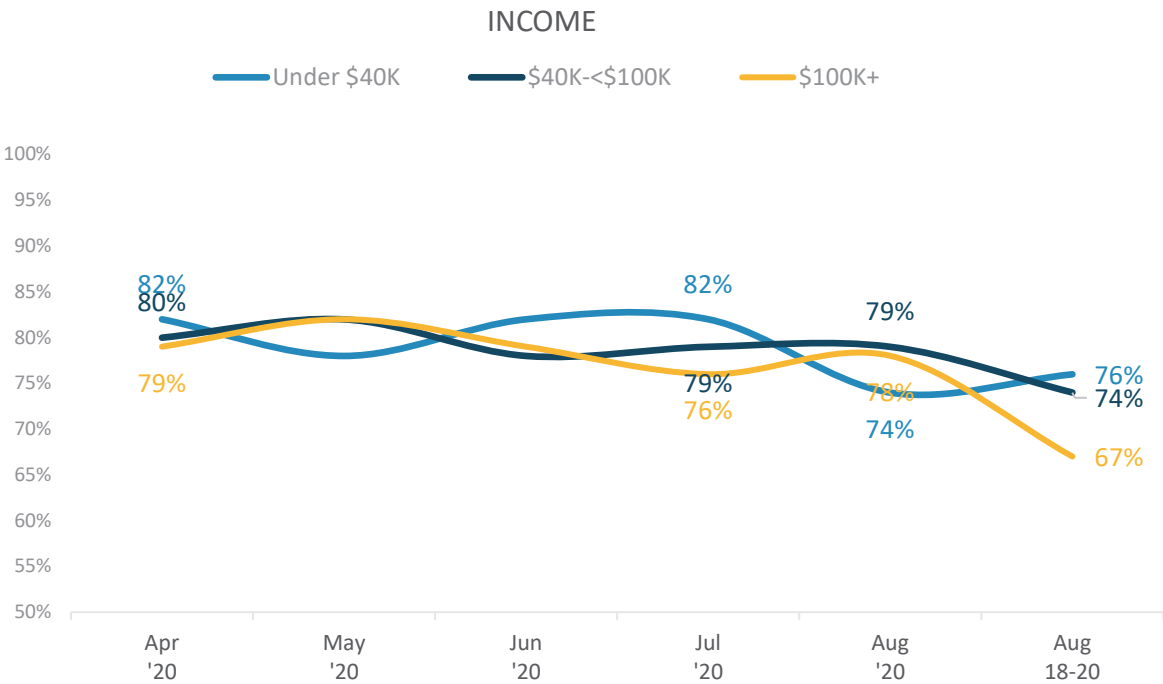
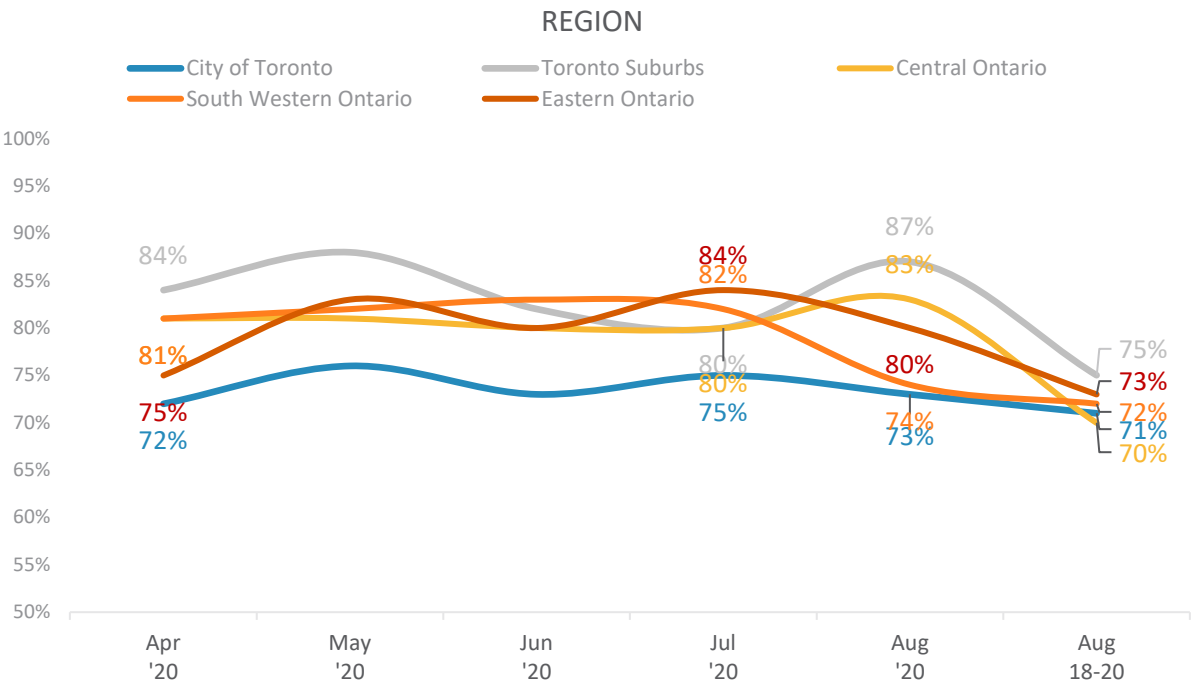


These graphs are based on 5 day roll in order to boost the sample sizes.

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 softer in all regions except the City of Toronto which remains stable. These scores are particularly weaker among those earning \$100K+.

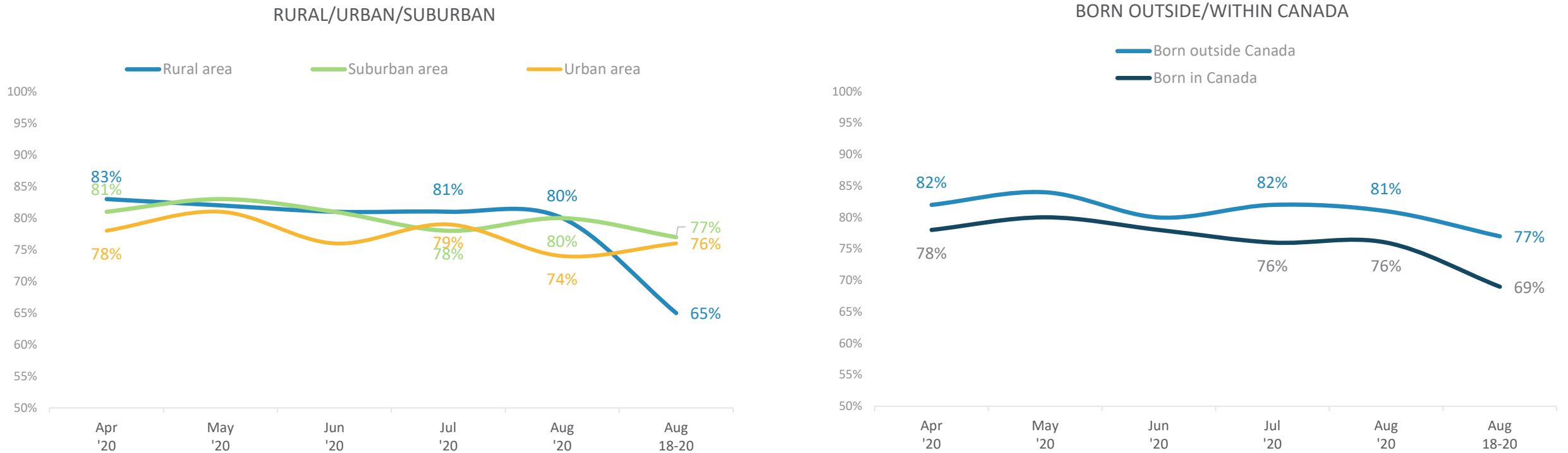
Right Track Scores – 6-Day Roll



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

Over the past week, ‘right track’ scores declined in rural Ontario. ‘Right track’ scores remain higher among those born outside Canada compared to those born in Canada.

Right Track Scores – 6-Day Roll



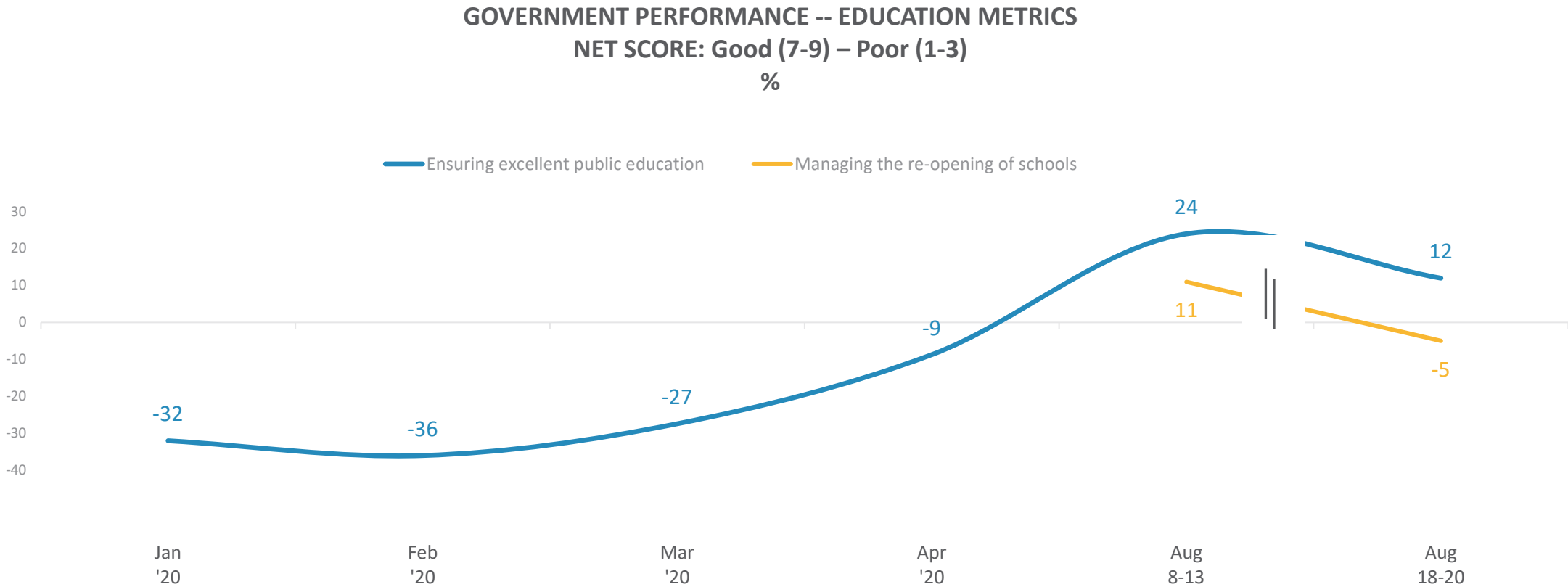
These graphs are based on 5 day roll in order to boost the sample sizes.

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

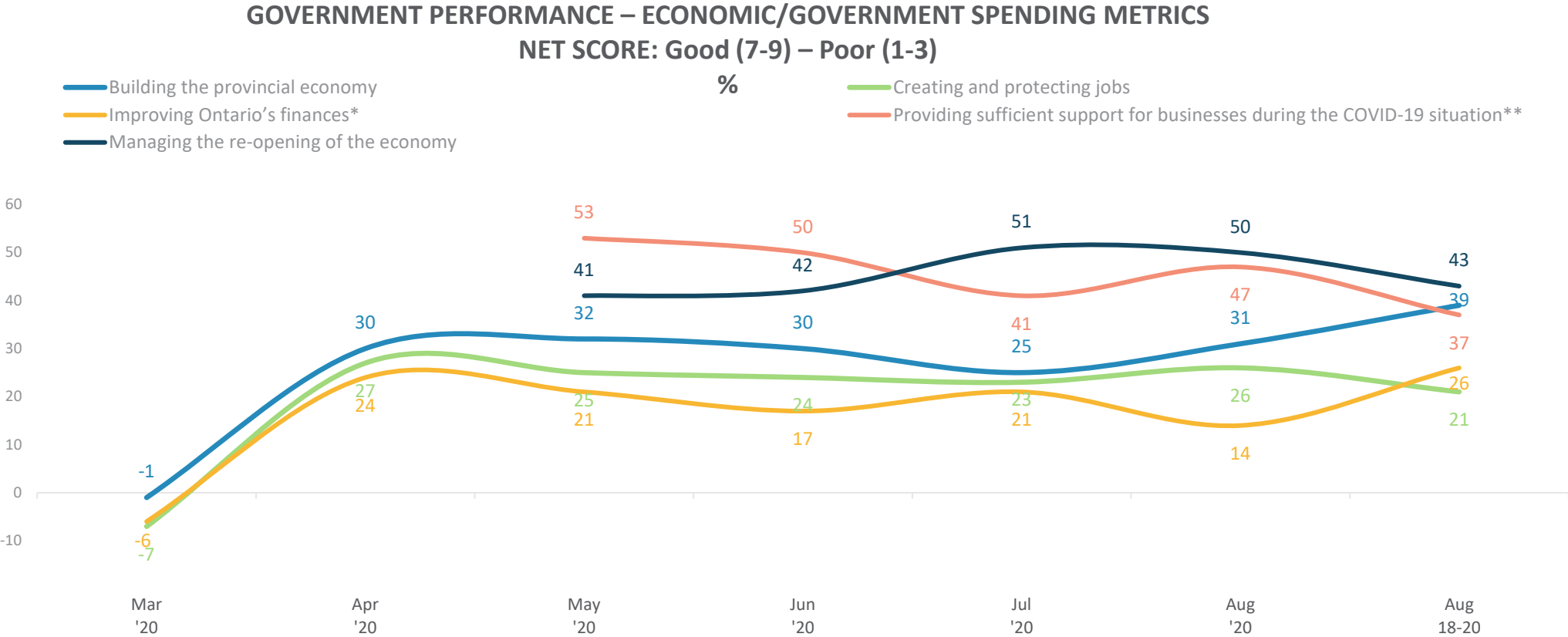


Perceptions toward the government’s performance on education metrics have weakened over the past week. Rating for both ‘ensuring excellent public education’ and ‘managing the re-opening of schools’ have softened.



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

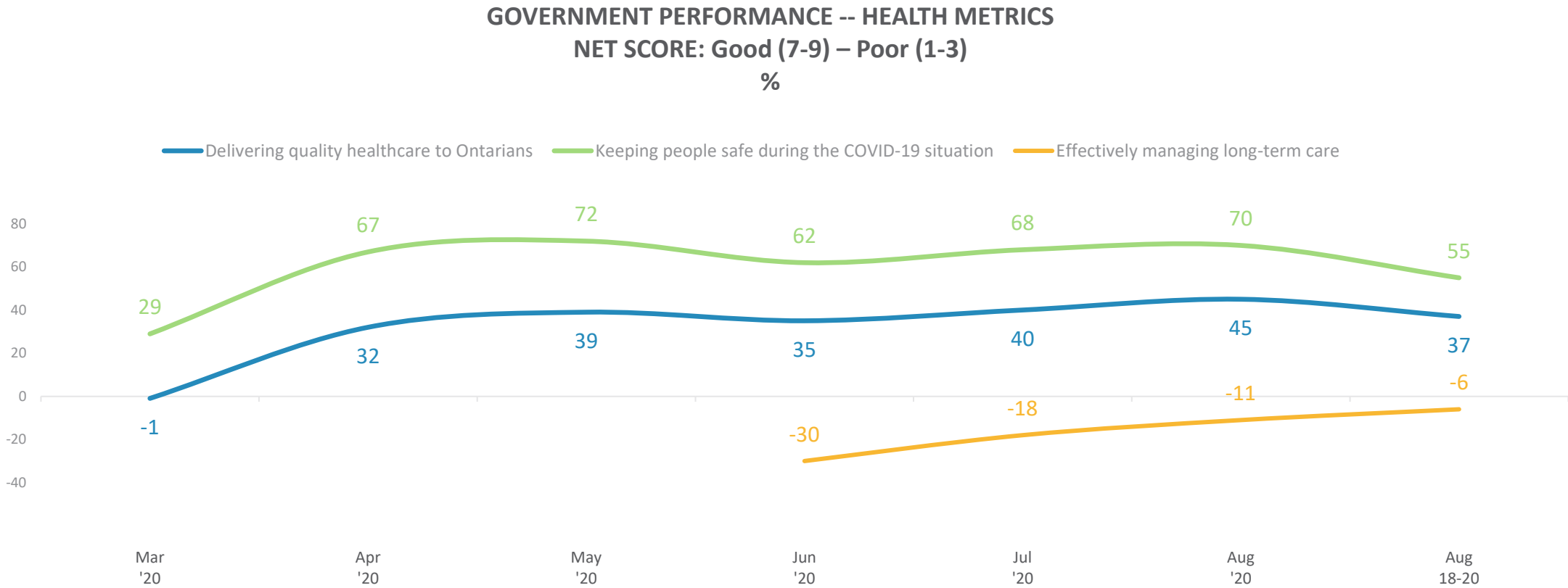
Perceptions toward the government’s performance on ‘managing the reopening of the economy’ and ‘providing sufficient support for businesses’ have softened. Despite the announcement of a much larger deficit, perceptions on ‘improving Ontario’s finances’ have improved over the past week.



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

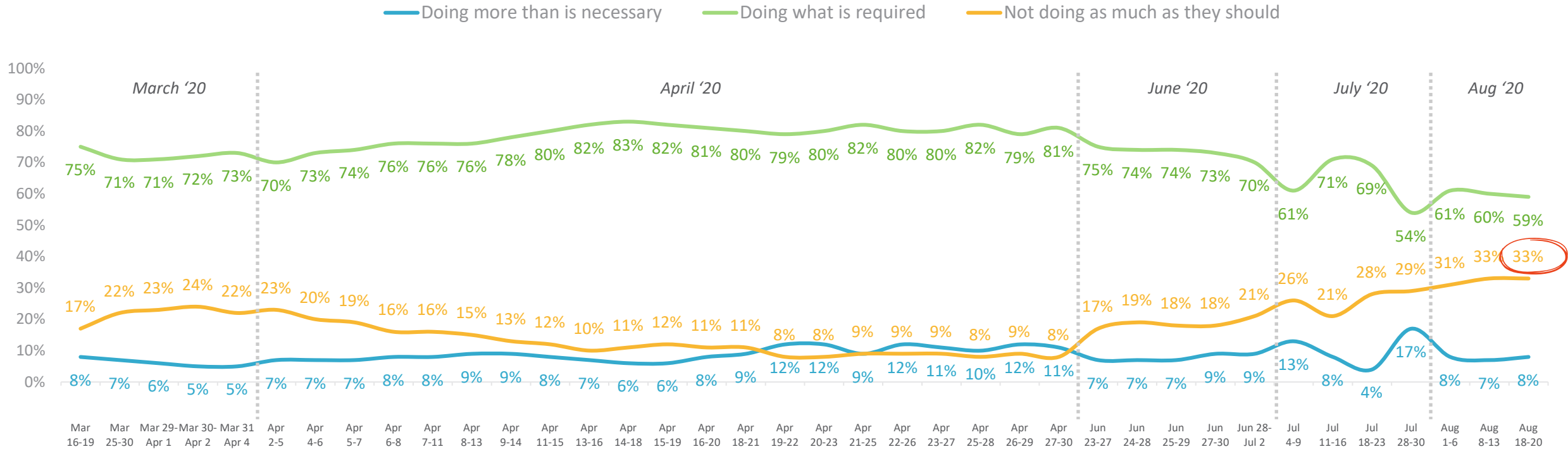
The government’s performance on the two key health metrics ‘keeping people safe during COVID-19’ and ‘delivering quality healthcare’ has softened. In contrast, there are improving perceptions about the government’s performance on ‘managing long-term care’.



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

About one-third 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	Aug 18-20	Jul 18-23	Jul 28-30	Aug 1-6	Aug 8-13	Aug 18-20	Jul 18-23	Jul 28-30	Aug 1-6	Aug 8-13	Aug 18-20
Right Track	5%	10%	7%	8%	7%	74%	67%	70%	68%	70%	21%	23%	23%	24%	23%
Wrong Track	-	34%	13%	3%	10%	50%	22%	26%	25%	34%	50%	44%	61%	73%	56%



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’. Over the past week, fewer Ontarians held this view.

	% 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	Aug 18-20	Jul 18-23	Jul 28-30	Aug 1-6	Aug 8-13	Aug 18-20	Jul 18-23	Jul 28-30	Aug 1-6	Aug 8-13*	Aug 18-20
	%	%	%	%	%	%	%	%	%	%	%	%	%	%	%
Advising the public and businesses about the measures they should take to prevent the spread of the virus	10	21	12	19	24	72	67	70	69	68	14	10	16	10	7
Managing the process of gradually re-opening the province	11	11	6	15	15	71	68	75	70	68	18	21	13	13	15
Taking the necessary actions to prevent the spread of the virus	13	10	7	13	18	68	72	74	70	60	18	17	15	15	19
Planning for the return to school in the fall	7	9	6	13	12	48	37	38	32	39	35	43	52	50	43

Ontarians’ top concerns are the health impact of the schools re-opening and a possible second wave of COVID-19.

% VERY CONCERNED	Aug 18-20
n=	varies
	%
The health impacts of the schools being reopened in September	55
A second wave of COVID-19 infections in the fall	51
That the Ontario economy is now officially in recession	41
The doubling of the provincial budget deficit in the past 5 months	35

QCV-115. Considering the current situation with COVID-19 in Ontario how concerned are you, personally, about each of the following. For each, please tell me if you are very concerned, somewhat concerned, not very concerned, or not at all concerned about...

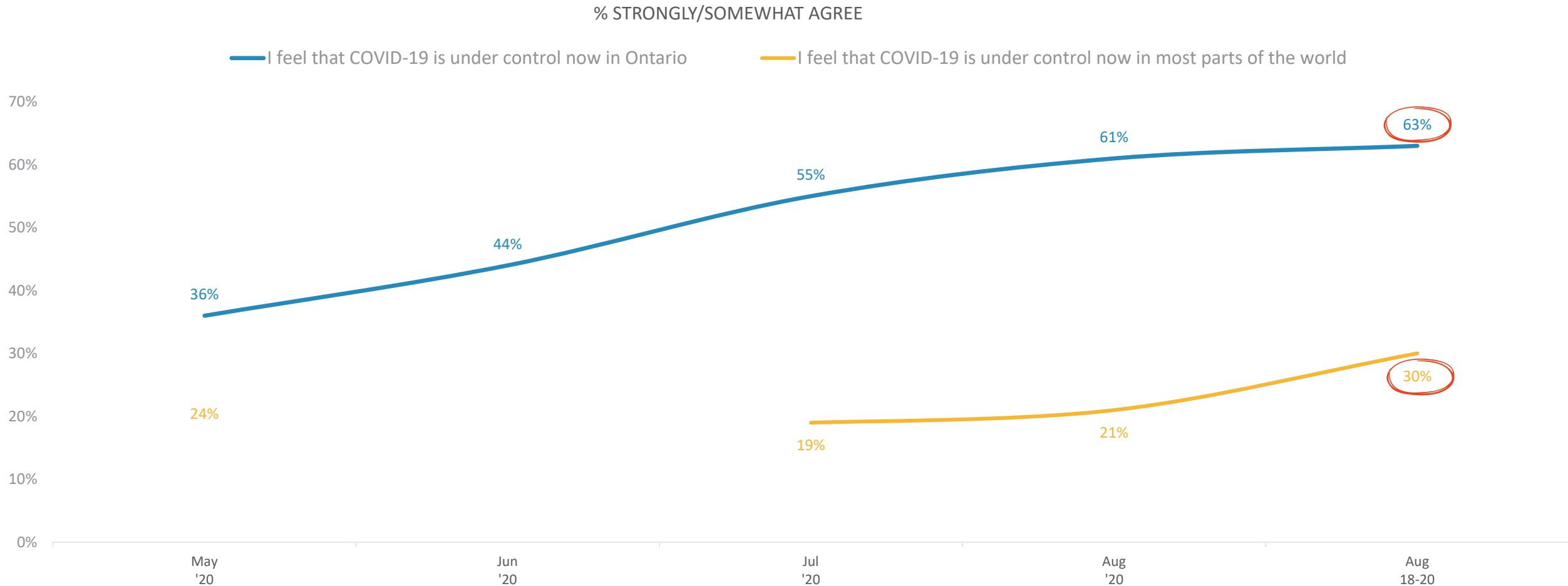
Base: Total sample

COVID-19 RISK TOLERANCE



PERCEPTIONS ABOUT WHETHER COVID-19 IS UNDER CONTROL

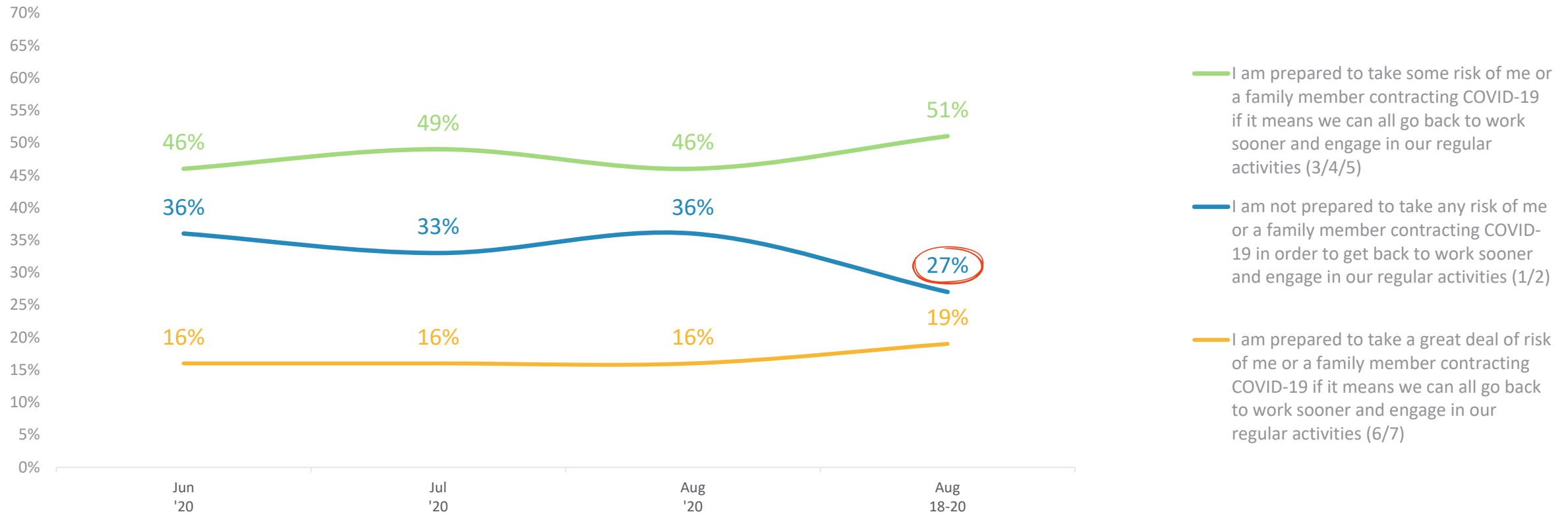
The belief that COVID-19 is under control in the province remains high. Interestingly, there are increasing perceptions that the rest of the world is getting the virus under control.



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

Over the past week, there has been an increase (from 62% to 70%) in the willingness to take at least 'some risk' to get back to work or regular life. There has also been a decline in the proportion who 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)

CONFIDENTIAL

IS WORST OF THE PANDEMIC OVER IN ONTARIO?

Preliminary results suggest Ontarians are divided over whether they think the worst of the pandemic is over. However, the intensity of those disagreeing (‘strongly’ disagree) with this assertion is stronger than those who ‘strongly’ agree.

I believe Ontario is over the worst of the pandemic

	Aug 18-20
n=	varies
	%
TOTAL AGREE	44
Strongly agree	14
Somewhat agree	30
Neither agree nor disagree	5
Somewhat disagree	19
Strongly disagree	28
TOTAL DISAGREE	47
Don't know	3

MOVING TO PHASE 3 – PACE OF THE SHIFT

Fully 6-in-10 Ontarians continue to feel the shift to Phase 3 is at the right pace. Moreover, there has been a declining perception among those who think the move to Phase 3 has been too quick. Only 12% feel the shift has been moving too slowly.

	Jul 18-23	Jul 28-30	Aug 1-6	Aug 8-13	Aug 18-20
n=	300	300	260	310	300
	%	%	%	%	%
Moving too quickly	37	39	33	31	27
At the right pace	56	52	58	58	60
Moving too slowly	6	8	5	9	12
Prefer not to answer/Don't know	1	1	4	2	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

Initial results show that most Ontarians disagree with the idea of relaxing the COVID-19 mitigation methods. The strength of disagreement is strong, too.

I feel it is now safe to relax most of the COVID 19 control measures, such as mask wearing and social distancing

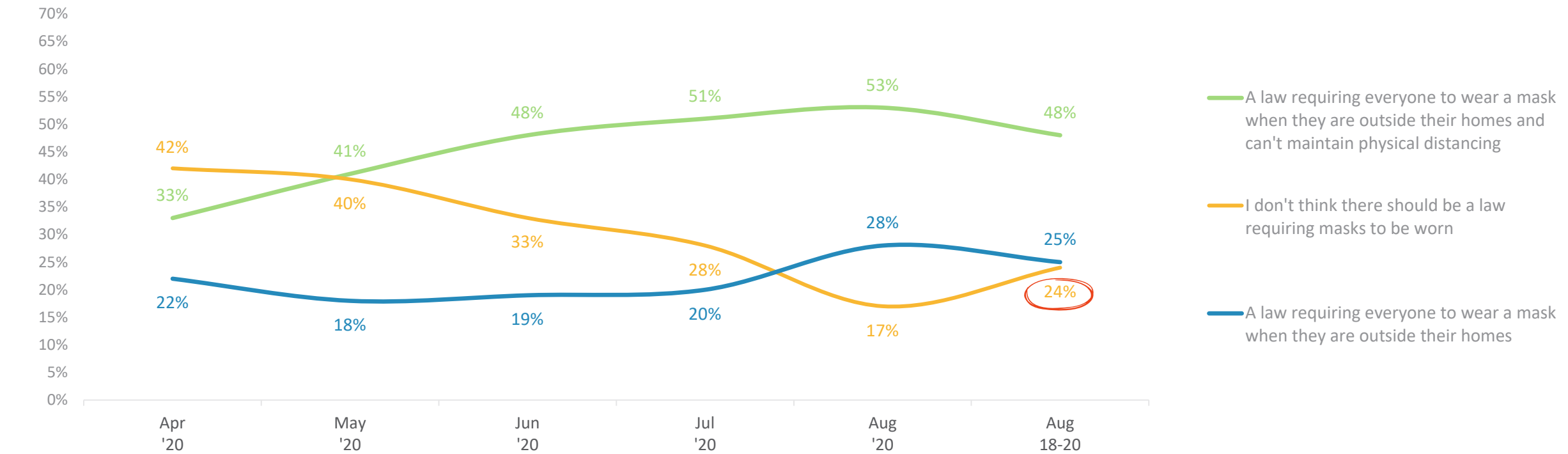
	Aug 18-20
n=	varies
	%
TOTAL AGREE	27
Strongly agree	11
Somewhat agree	16
Neither agree nor disagree	2
Somewhat disagree	13
Strongly disagree	57
TOTAL DISAGREE	70
Don't know	<1

MASK WEARING PERCEPTIONS



MAKING THE WEARING OF A MASK A LEGAL REQUIREMENT

Many Ontarians would like some level of legal codification of face mask wearing. There has been a slight increase in the proportion who think that there should be no across the board law.



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

FREQUENCY OF FACE MASK WEARING

Fully 80% say they wear a mask ‘all of the time’ or ‘most of the time’. About 49% 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	Aug 18-20
n=	313	400	400	410	410	410	410	410	410	300	300	300	300	260	310	300
	%	%	%	%	%	%	%	%	%	%	%	%	%	%	%	%
TOTAL ALL/MOST OF THE TIME	52	52	52	52	54	55	58	58	60	60	72	76	77	73	81	80
All of the time	26	27	27	23	25	25	25	29	29	22	45	42	47	48	56	49
Most of the time	26	25	26	29	29	31	33	29	32	38	27	34	29	24	25	30
Some of the time	26	26	28	28	26	25	24	26	24	20	20	17	15	17	13	14
Rarely	19	18	15	17	17	16	15	12	13	18	5	7	7	9	5	4
Never	4	3	4	3	3	4	3	3	3	3	2	1	1	1	1	2
RARELY/NEVER	23	21	20	20	20	20	18	15	16	21	7	8	8	10	6	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

CONFIDENTIAL

Many Ontarians (59%) are not tired of the COVID-19 mitigation measures.

I am getting very tired of all the COVID 19 control measures, such as mask wearing and social distancing

	Aug 18-20
n=	varies
	%
TOTAL AGREE	37
Strongly agree	21
Somewhat agree	16
Neither agree nor disagree	4
Somewhat disagree	15
Strongly disagree	44
TOTAL DISAGREE	59
Don't know	-

QCV-8B. Do you agree or disagree with each of the following statements about the effects of COVID-19. The first is ...

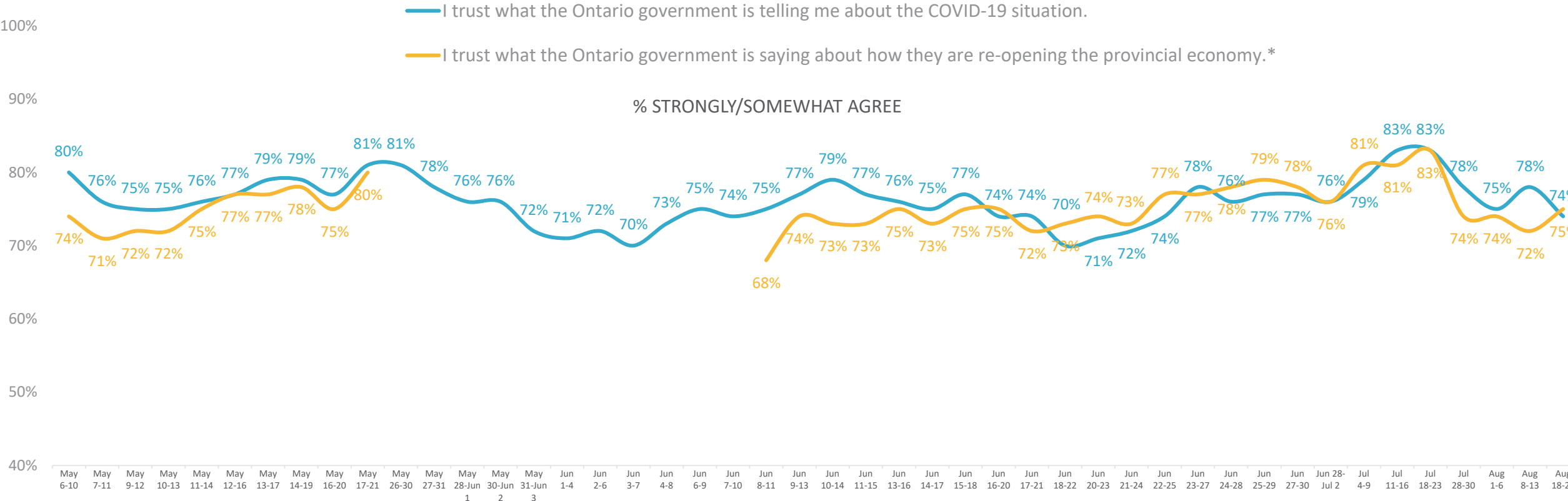
Base: Total sample, base varies

CONFIDENCE IN GOVERNMENT COVID-19 MESSAGING



TRUST IN THE GOVERNMENT’S COMMUNICATIONS ABOUT COVID-19

Ontarians continue to have trust in the government’s messaging about the general COVID-19 situation and re-opening of the economy. The trust levels are down a bit compared to mid-July scores.



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 continue to 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	Aug 18-20
n=	300	260	310	300
	%	%	%	%
Spending more than you would normally	14	15	20	18
Spending about as much as you would normally	40	29	35	30
Spending less than you would normally	45	54	43	52
Don't know	2	2	2	<1

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

ONTARIO ECONOMY



Preliminary results indicate most Ontarians agree that it was necessary to double the provincial deficit to fight COVID-19. Again, the strength of the agreement (‘very’ necessary) is strong.

	Aug 18-20
n=	varies
	%
TOTAL NECESSARY	85
Very necessary	56
Somewhat necessary	29
Not too necessary	6
Not at all necessary	5
TOTAL NOT NECESSARY	11
Not sure/Don't know	4

The initial results show that Ontarians are divided on the current state of the economy: 43% feel the economy is not worsening, but it is not getting better; while 44% say that the economy is starting to recover. Only 10% feel the economy is getting worse.

	Aug 18-20
n=	varies
	%
The economy continues to get worse	10
The economy is not worsening, but is also not recovering	43
The economy is starting to recover	44
Don't know/not sure	3

QCV-117. Thinking about the state of the provincial economy, which of the following best reflects your own experience?

Base: Total sample

Preliminary results suggest that Ontarians are divided over whether they are confident about the economic recovery over the next year.

	Aug 18-20
n=	Varies
	%
TOTAL CONFIDENT	49
Very confident	16
Somewhat confident	33
Not too confident	34
Not at all confident	16
TOTAL NOT CONFIDENT	50
Not sure/Don't know	1

QCV-118. How confident or not are you that the economy will recover fully by some time next year?

Base: Total sample

EXPECTED LENGTH OF THE ECONOMIC RECOVERY

These early results again show that Ontarians are very cautious about the expected length of an economic recovery: about 55% expect it will take at least 24 months for the economy to recover.

	Aug 18-20
n=	VARIES
	%
6 months or less	5
9 months	2
12 months	18
18 months	9
24 months	25
36 months or more	30
The economy will never fully recover	8
Don't know/not sure	3

QCV-119. Overall how long from now do you think it will take for the economy to fully recover?

Base: Total sample

Initial results indicate that a slight majority of Ontarians feel that estimates that the government has enabled 90% of the economic activity after the shutdown are realistic.

	Aug 18-20
n=	173
	%
TOTAL REALISTIC	55
Very realistic	11
Somewhat realistic	44
Not too realistic	29
Not at all realistic	13
TOTAL NOT REALISTIC	42
Not sure/Don't know	4

IF THE 90% ESTIMATE OF THE ECONOMIC ACTIVITY HAS RESUMED IS REALISTIC, IS THE ECONOMIC RECOVER UNDERWAY?

The early findings suggest that Ontarians are divided whether the estimate that 90% of the economic activity has resumed is an indication of an economic recovery.

	Aug 18-20
	n= varies
	%
Yes	47
No	47
Don't know/not sure	6

QCV-121. If, in fact, the estimate of 90% of the economic activity has resumed is realistic, does this suggest that the economic recovery is well underway?
Base: Total sample