

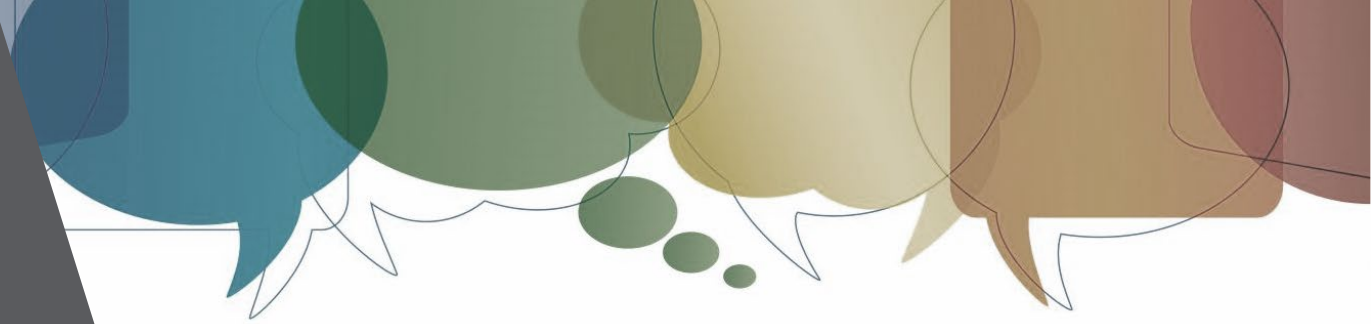


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SEPTEMBER 2020 RESEARCH

PULSE REPORT ON COVID-19 – REPORT #46

CABINET OFFICE

September 4th 2020



KEY FINDINGS

Key Findings

1 The government's 'right track' scores are beginning to settle in the mid- seventies after being in the low 80s for five months. This week's score is 75%.

2 Despite the ongoing media controversy about re-opening the schools', positive perceptions toward the government's performance on 'ensuring excellent public education' and 'managing the re-opening of schools' remains stable.

Those who see the government on the 'right track' are much more positive about its performance on the management of school re-opening compared to those who see the government on the 'wrong track'.

3 The preliminary results show that there is strong support for teachers being declared essential workers. About 1-in-2 say they 'strongly' support this policy action.

Those who see the government on the 'right track' are only slightly more likely to support this policy action compared to those who see the government on the 'wrong track'.

4 Early findings suggest that about one-third hold some misperceptions about the COVID-19 virus being similar to flu viruses and flu vaccinations providing some protection from other viruses including COVID-19.

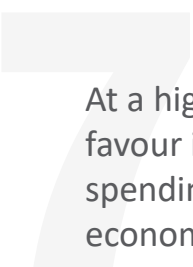
5 Consumer confidence may be on the rise. Over the past two weeks, Ontarians are a bit more likely to say they would spend as much as they would normally.

We should continue to monitor this metric.

6 Ontarians are divided on the current state of the economy: 38% feel the economy is not worsening, but it is not getting better; while 43% say that the economy is starting to recover. Only 15% feel the economy is getting worse.

Ontarians are very cautious about the expected length of an economic recovery: about 63% (up from 55% two weeks ago) expect it will take at least 24 months for the economy to recover

Key Findings



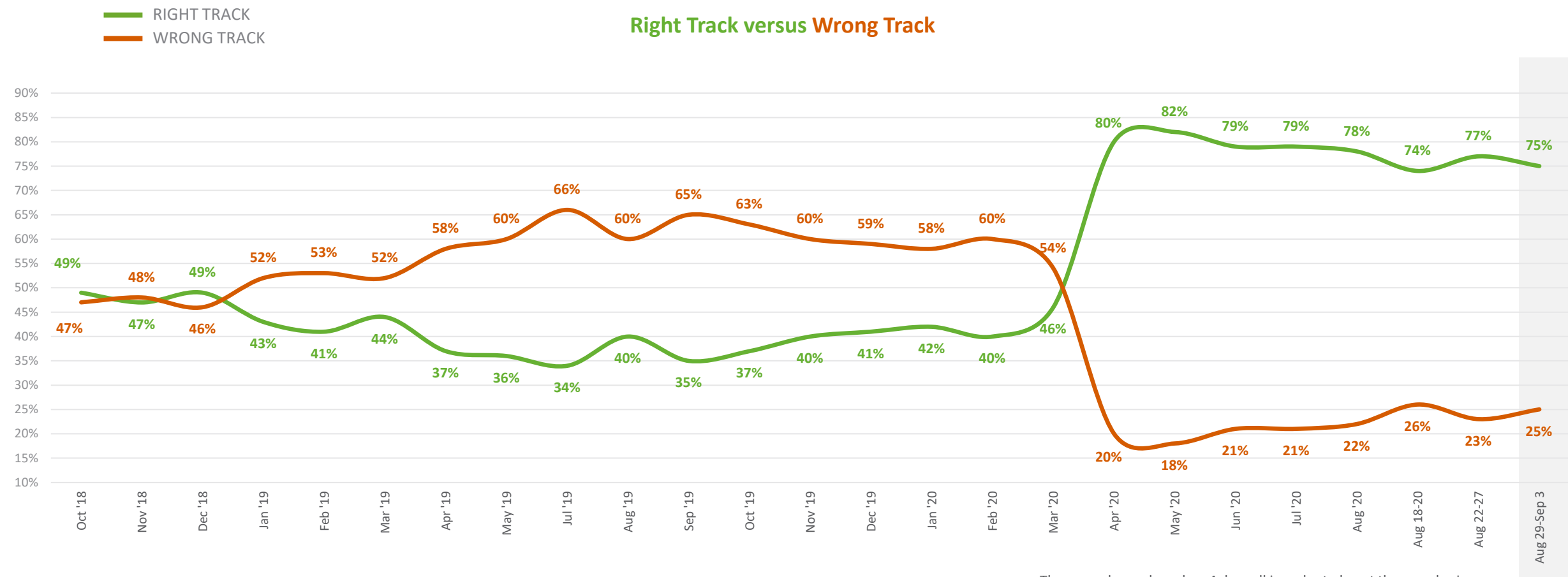
At a high level, most Ontarians continue to favour infrastructure spending over tax spending in order to get the Ontario economy moving again.

When asked about specific initiatives, Ontarians seem to prefer tax relief to Ontario manufacturers and lower personal and business taxes.

RIGHT TRACK
WRONG TRACK



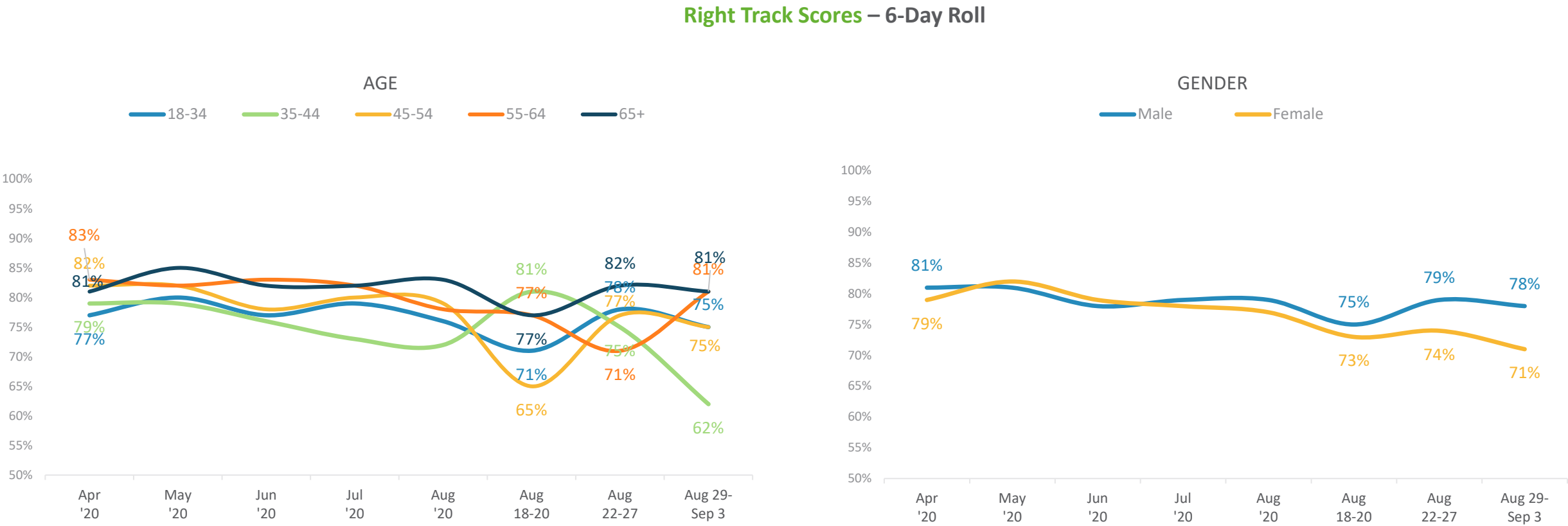
Over the past week, the government’s ‘right track’ scores remained relatively stable at 75%



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 slightly stronger among men compared to women over the past two weeks.

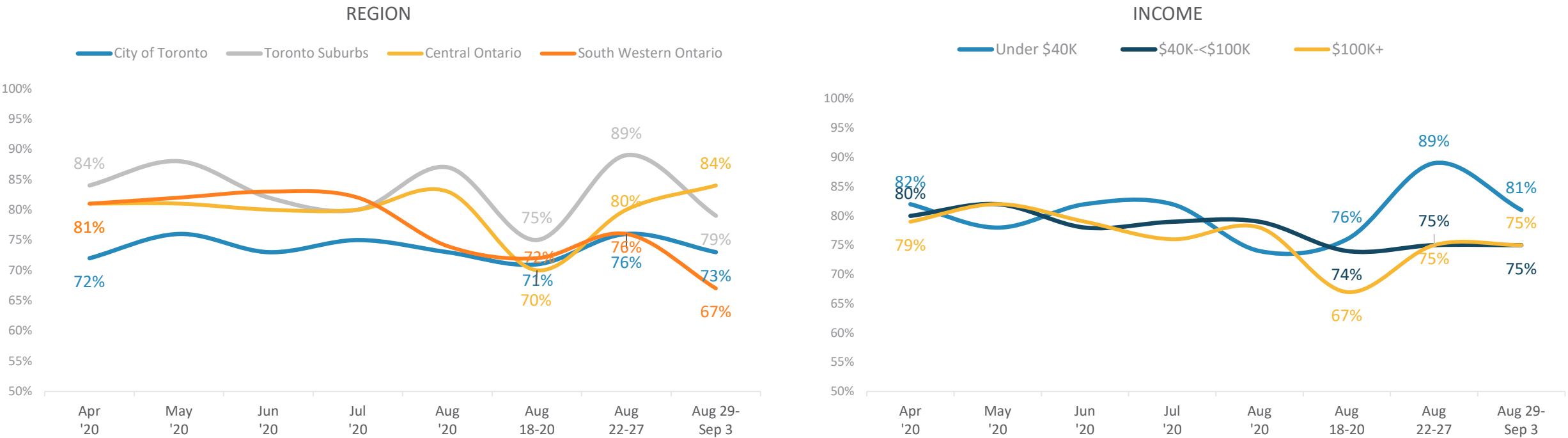


These graphs are based on 5 day roll in order to boost the sample sizes.

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 strong among those earning <\$40k and in Suburban Toronto and Central Ontario.

Right Track Scores – 6-Day Roll

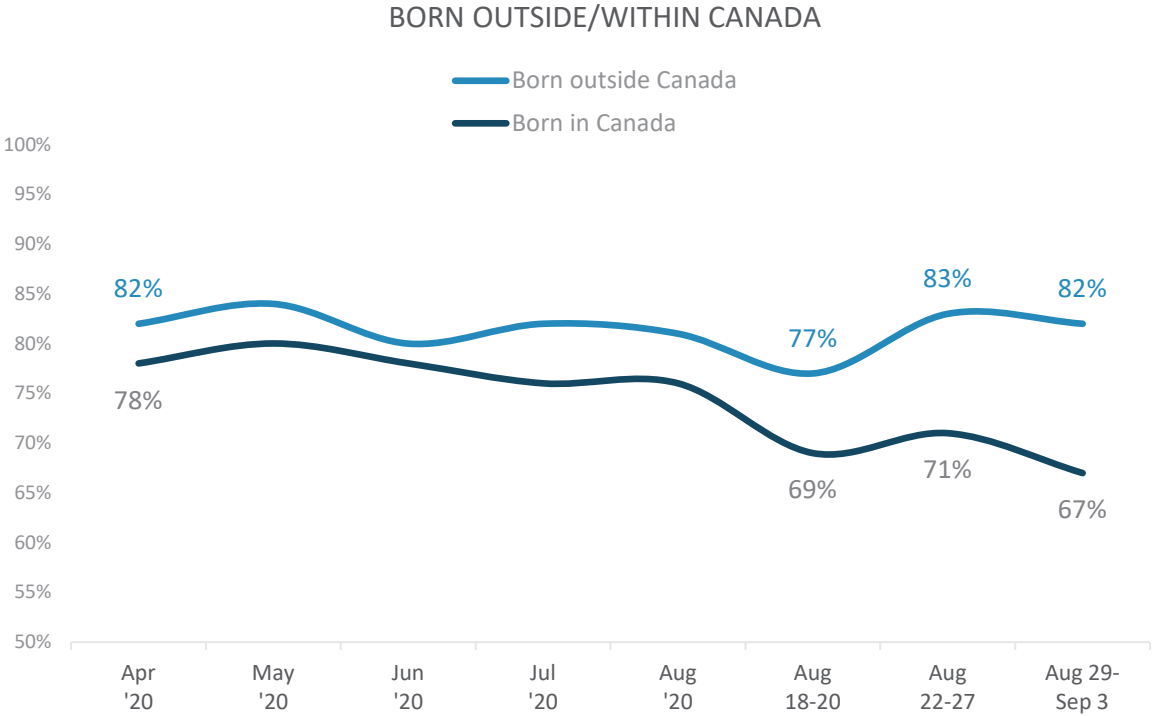
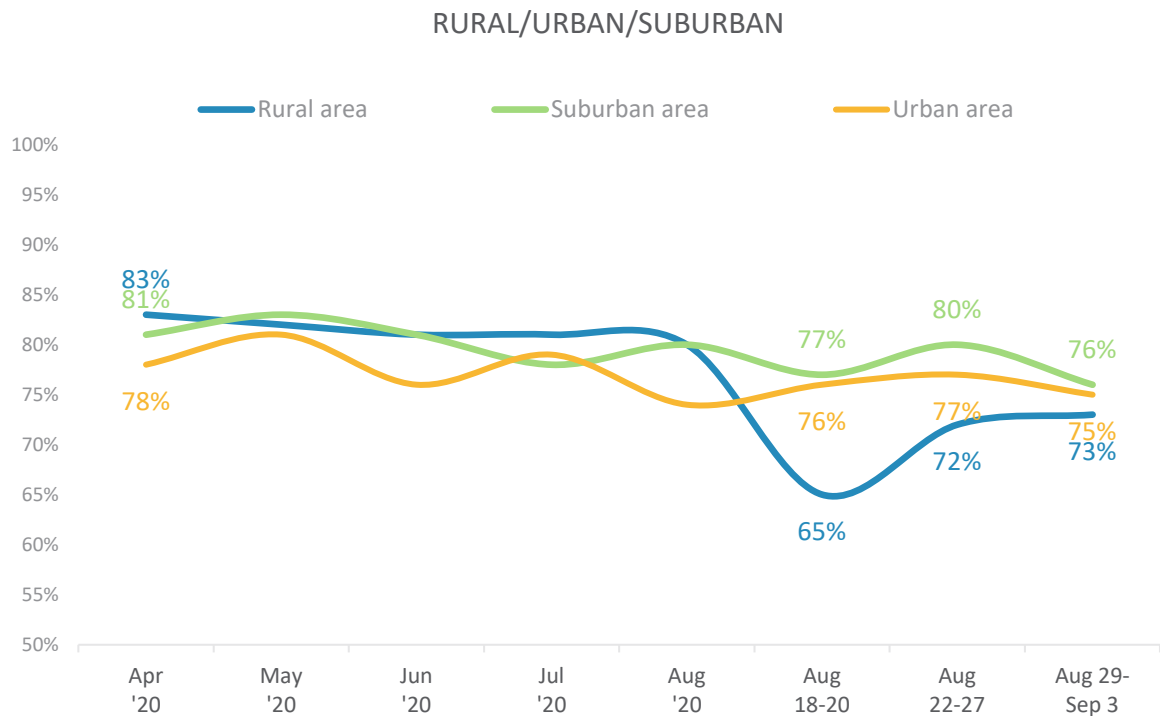


These graphs are based on 5 day roll in order to boost the sample sizes.

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 a bit weaker in rural Ontario, while stronger among those born outside Canada.

Right Track Scores – 6-Day Roll

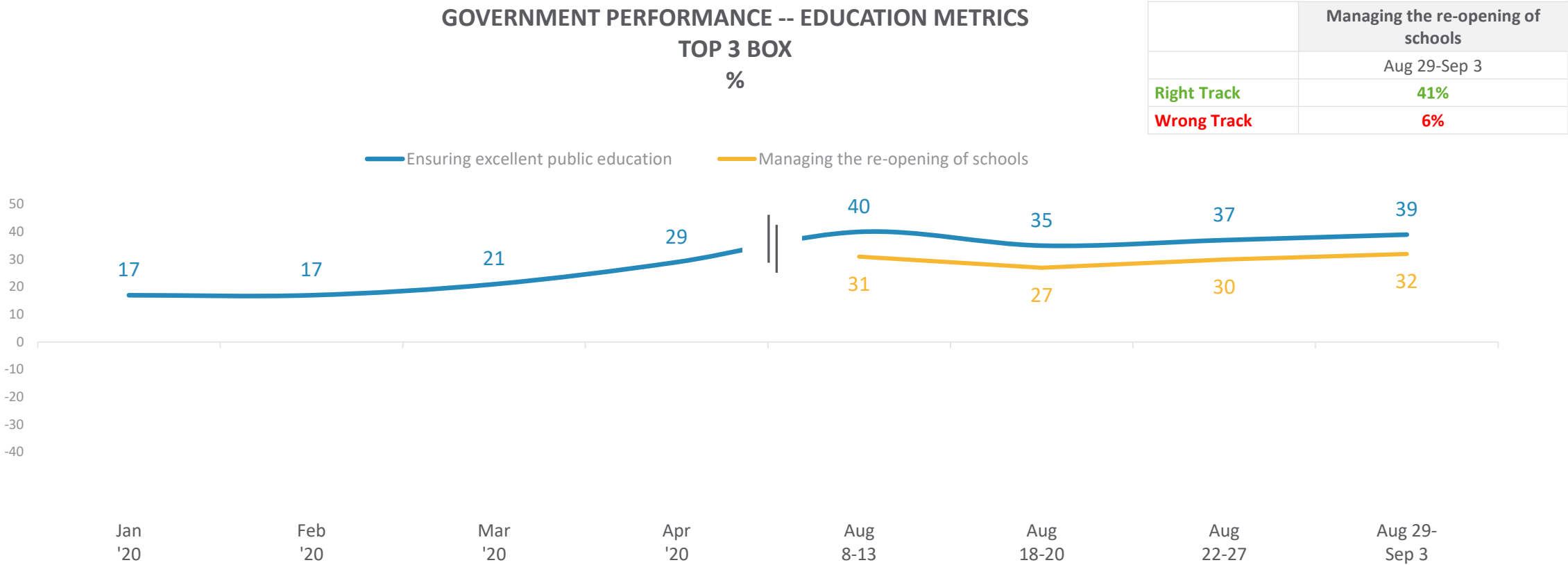


These graphs are based on 5 day roll in order to boost the sample sizes.

PERCEPTIONS OF GOVERNMENT PERFORMANCE DURING COVID-19 PANDEMIC

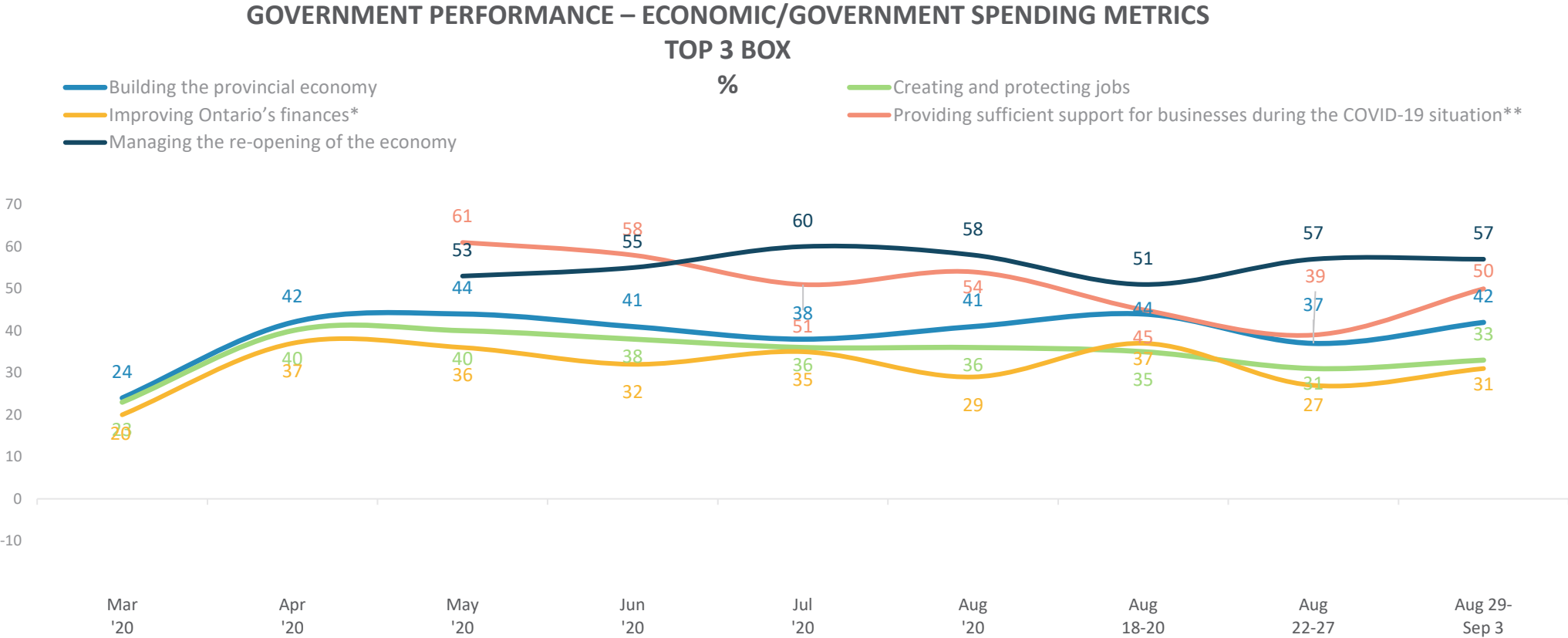


Positive perceptions toward the government’s performance on ‘ensuring excellent public education’ and ‘managing the re-opening of schools’ remains stable. Those who see the government on the ‘right track’ are much more positive about its performance on the management of re-opening schools.



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

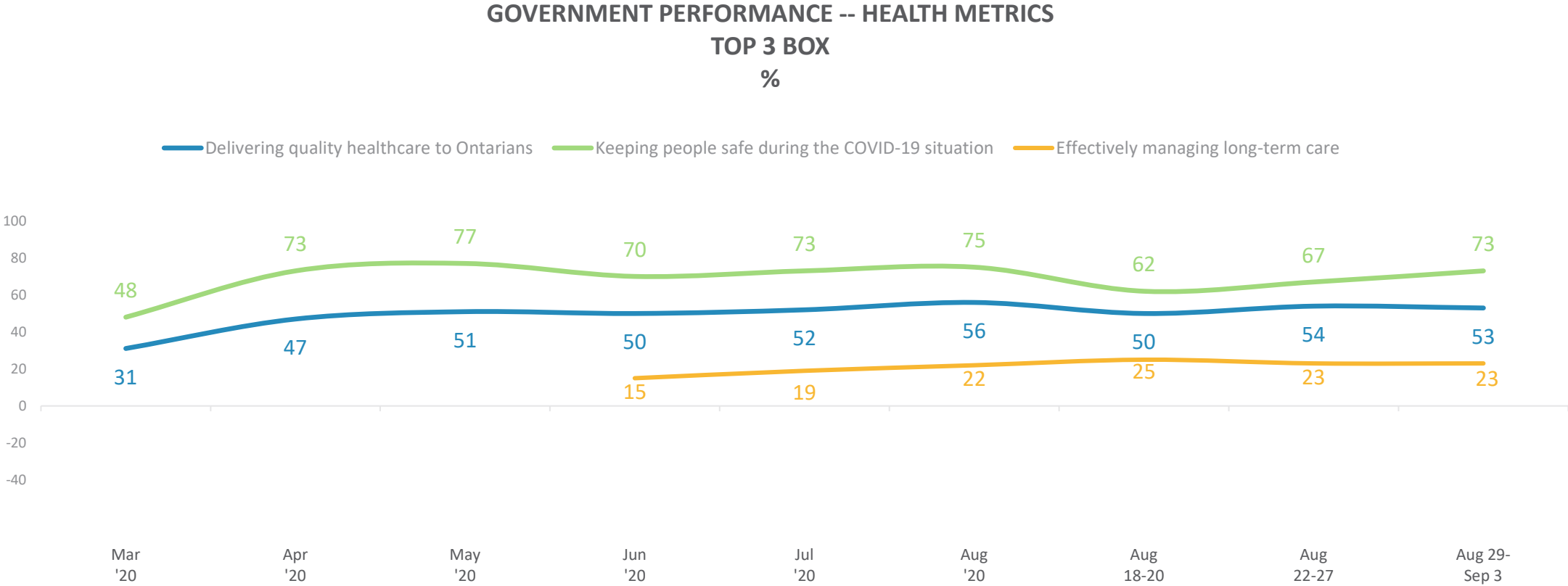
Perceptions toward the government’s performance continues to be strongest on ‘managing the re-opening of the economy’. There has been an uptick in positive perceptions toward ‘providing sufficient support for businesses during the COVID-19 situation’.



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”

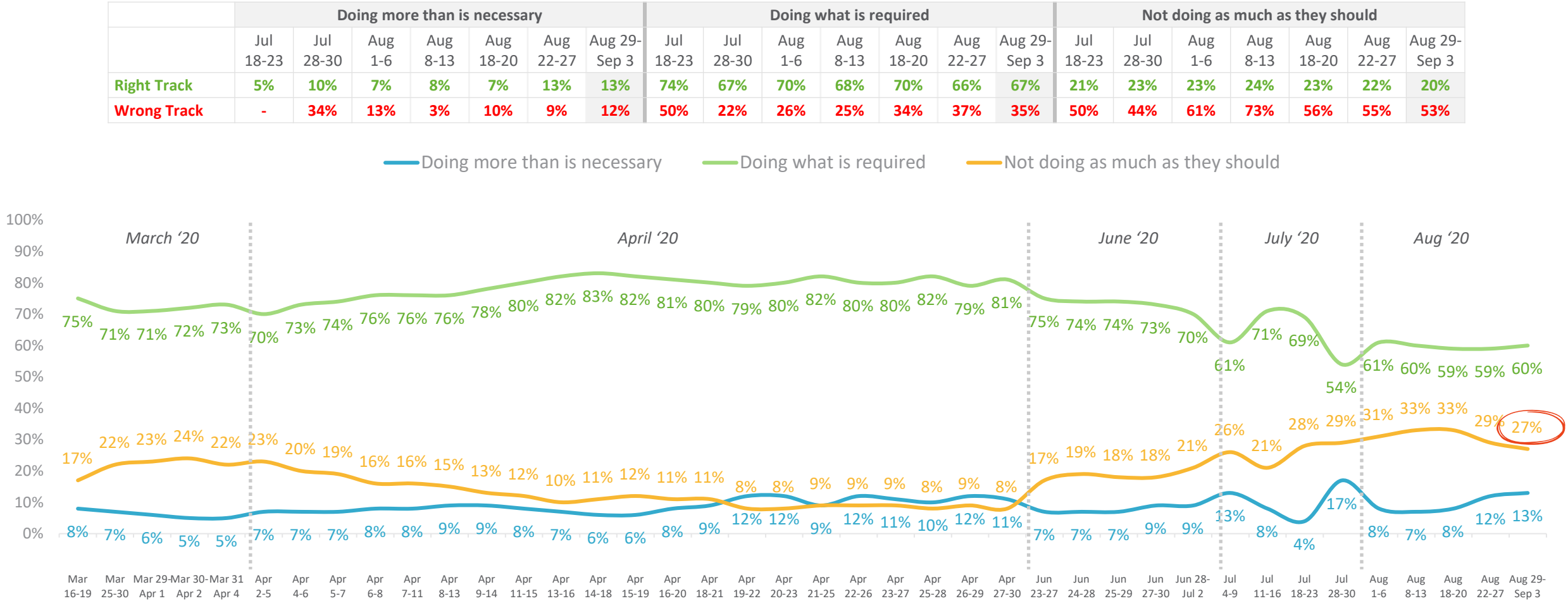
Bases vary

Positive perceptions toward the government’s performance on ‘keeping people safe during the COVID-19 situation’ has been trending upwards, while its performance on the metrics ‘delivering quality healthcare’ and ‘managing long-term care’ remains 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

Just under 3-in-10 feel 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

‘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	Aug 18-20	Aug 22-27	Aug 29-Sep 3	Jul 18-23	Jul 28-30	Aug 1-6	Aug 8-13	Aug 18-20	Aug 22-27	Aug 29-Sep 3	Jul 18-23	Jul 28-30	Aug 1-6	Aug 8-13*	Aug 18-20	Aug 22-27	Aug 29-Sep 3
	%	%	%	%	%	%	%	%	%	%	%	%	%	%	%	%	%	%	%	%	%
Advising the public and businesses about the measures they should take to prevent the spread of the virus	10	21	12	19	24	13	16	72	67	70	69	68	72	70	14	10	16	10	7	13	12
Managing the process of gradually re-opening the province	11	11	6	15	15	9	13	71	68	75	70	68	75	67	18	21	13	13	15	15	18
Taking the necessary actions to prevent the spread of the virus	13	10	7	13	18	11	15	68	72	74	70	60	70	71	18	17	15	15	19	19	12
Planning for the return to school in the fall	7	9	6	13	12	9	9	48	37	38	32	39	31	39	35	43	52	50	43	51	47

Ontarians’ are less concerned about the provincial deficit compared to health impacts of the schools re-opening, a possible second wave of COVID-19, and economic recession.

% VERY CONCERNED	Aug 18-20	Aug 22-27	Aug 29-Sep 3
n=	varies		
	%	%	%
The health impacts of the schools being reopened in September	55	57	47
A second wave of COVID-19 infections in the fall	51	55	56
That the Ontario economy is now officially in recession	41	45	47
The doubling of the provincial budget deficit in the past 5 months	35	38	39

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

DECLARING TEACHERS ESSENTIAL WORKERS



DECLARING TEACHERS AN ESSENTIAL WORKERS

The preliminary results show that there is strong support for teachers being declared essential workers. About 1-in-2 say they ‘strongly’ support this policy action.

	Aug 29-Sep 3
n=	varies
	%
<i>Teachers should be declared essential workers</i>	
TOTAL AGREE	70
Strongly agree	50
Somewhat agree	20
Neither agree nor disagree	6
Somewhat disagree	10
Strongly disagree	13
TOTAL DISAGREE	23
Don't know	1
<i>During the pandemic, there have been a number of occupations which have been declared essential workers, including grocery clerks, pharmacists and truck drivers. Do you agree or disagree that teachers should also be classified essential workers?</i>	
TOTAL AGREE	70
Strongly agree	52
Somewhat agree	19
Somewhat disagree	10
Strongly disagree	15
TOTAL DISAGREE	26
Don't know	4

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

Base: Total sample, base varies

QCV-123 During the pandemic, there have been a number of occupations which have been declared essential workers, including grocery clerks, pharmacists and truck drivers.

Do you agree or disagree that teachers should also be classified essential workers?

Base: Total sample, base varies (Aug 29-Sep 3 n=310)

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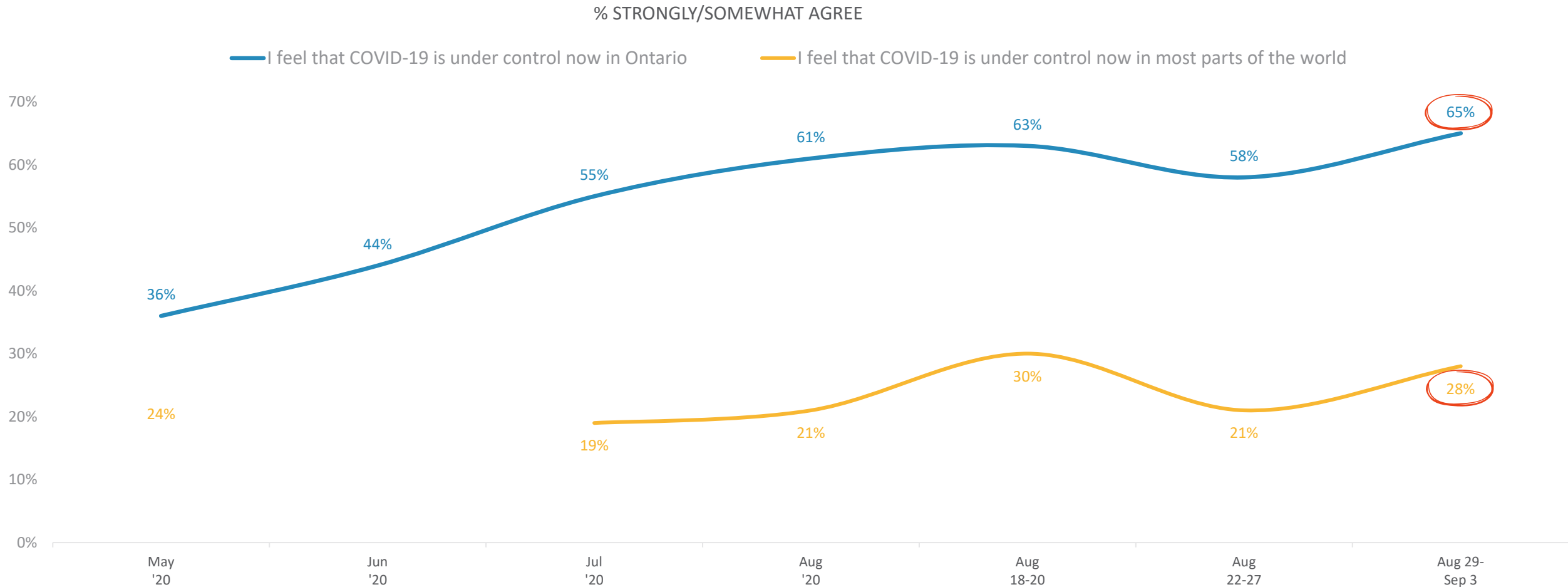
COVID-19

RISK TOLERANCE



PERCEPTIONS ABOUT WHETHER COVID-19 IS UNDER CONTROL

The belief that COVID-19 is under control in the province remains high, particularly compared to the rest of the world.



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

IS WORST OF THE PANDEMIC OVER IN ONTARIO?

Ontarians are divided over whether they think the worst of the pandemic is over.

I believe Ontario is over the worst of the pandemic

	Aug 18-20	Aug 22-27	Aug 29-Sep 3
n=	varies		
	%	%	%
TOTAL AGREE	44	40	44
Strongly agree	14	21	27
Somewhat agree	30	19	17
Neither agree nor disagree	5	7	9
Somewhat disagree	19	21	16
Strongly disagree	28	30	28
TOTAL DISAGREE	47	51	43
Don't know	3	1	3

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 (from 39% to 26%) among those who think the move to Phase 3 has been too quick.

	Jul 18-23	Jul 28-30	Aug 1-6	Aug 8-13	Aug 18-20	Aug 22-27	Aug 29- Sep 3
n=	300	300	260	310	300	310	310
	%	%	%	%	%	%	%
Moving too quickly	37	39	33	31	27	28	26
At the right pace	56	52	58	58	60	60	60
Moving too slowly	6	8	5	9	12	9	12
Prefer not to answer/Don't know	1	1	4	2	2	3	3

QCV-112. All 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

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MASK WEARING PERCEPTIONS



FREQUENCY OF FACE MASK WEARING

About 81% say they wear a mask ‘all of the time’ or ‘most of the time’, while about 54% 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	Aug 22-27	Aug 29-Sep 3
n=	313	400	400	410	410	410	410	410	410	300	300	300	300	260	310	300	310	310
	%	%	%	%	%	%	%	%	%	%	%	%	%	%	%	%	%	%
TOTAL ALL/MOST OF THE TIME	52	52	52	52	54	55	58	58	60	60	72	76	77	73	81	80	84	81
All of the time	26	27	27	23	25	25	25	29	29	22	45	42	47	48	56	49	55	54
Most of the time	26	25	26	29	29	31	33	29	32	38	27	34	29	24	25	30	29	28
Some of the time	26	26	28	28	26	25	24	26	24	20	20	17	15	17	13	14	11	12
Rarely	19	18	15	17	17	16	15	12	13	18	5	7	7	9	5	4	4	5
Never	4	3	4	3	3	4	3	3	3	3	2	1	1	1	1	2	1	1
RARELY/NEVER	23	21	20	20	20	20	18	15	16	21	7	8	8	10	6	6	5	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

THE FLU VACCINE



Early results suggest that about one-third hold some misperceptions about the COVID-19 virus being similar to flu viruses and flu vaccinations providing some protection from other viruses including COVID-19.

	Aug 29-Sep 3
n=	varies
	%
<i>I believe that COVID-19 virus is similar to flu viruses</i>	
TOTAL AGREE	36
Strongly agree	17
Somewhat agree	19
Neither agree nor disagree	4
Somewhat disagree	17
Strongly disagree	41
TOTAL DISAGREE	57
Don't know	3
<i>Getting the flu vaccination provides some protection from other viruses including COVID-19</i>	
TOTAL AGREE	31
Strongly agree	18
Somewhat agree	13
Neither agree nor disagree	4
Somewhat disagree	15
Strongly disagree	43
TOTAL DISAGREE	58
Don't know	6

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

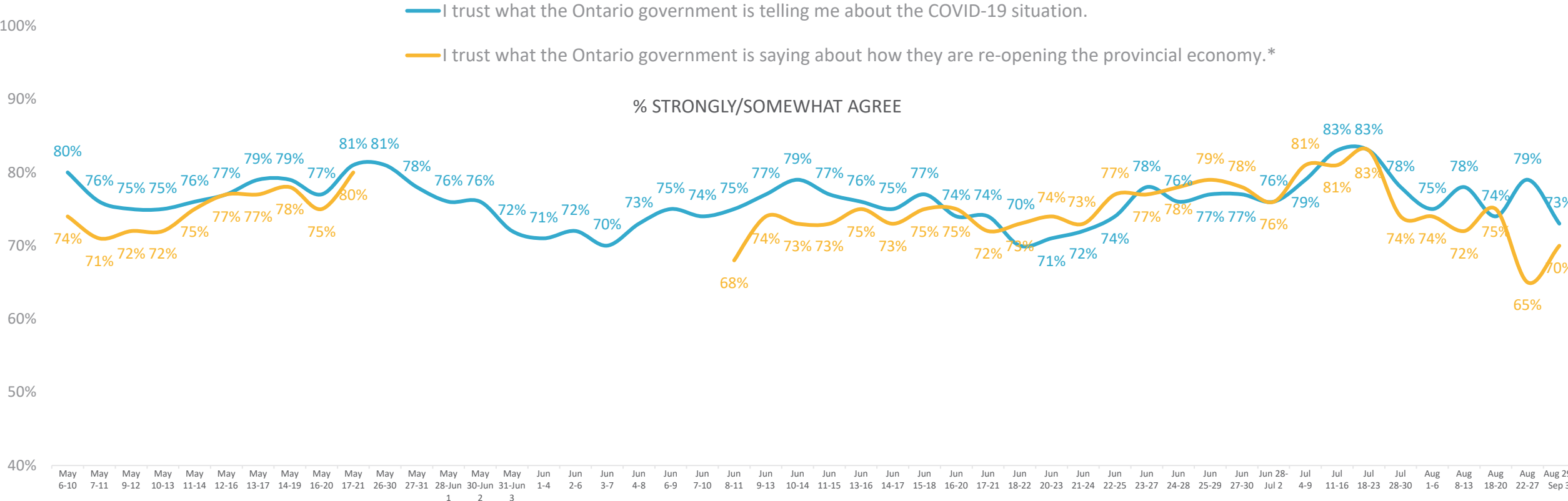
Base: Total sample, base varies

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’, although there has been a slight decline this week.



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



CONSUMER CONFIDENCE AS THE PROVINCE'S ECONOMY MOVES INTO PHASE 3

Interestingly, over the past two weeks, Ontarians are a bit more likely to say they would spend as much as they would normally. We should continue to monitor this metric.

EXPECTED SPENDING BEHAVIOUR AS THE ECONOMY SHIFTS INTO PHASE 3

	Jul 28-30	Aug 1-6	Aug 8-13	Aug 18-20	Aug 22-27	Aug 29- Sep 3
n=	300	260	310	300	310	310
	%	%	%	%	%	%
Spending more than you would normally	14	15	20	18	19	12
Spending about as much as you would normally	40	29	35	30	41	45
Spending less than you would normally	45	54	43	52	38	42
Don't know	2	2	2	<1	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

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ONTARIO ECONOMY



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	Aug 22-27	Aug 29-Sep 3
n=	varies		
	%	%	%
TOTAL NECESSARY	85	89	83
Very necessary	56	47	52
Somewhat necessary	29	42	31
Not too necessary	6	2	8
Not at all necessary	5	5	4
TOTAL NOT NECESSARY	11	7	12
Not sure/Don't know	4	4	5

Ontarians are divided on the current state of the economy: 38% feel the economy is not worsening, but it is not getting better; while 43% say that the economy is starting to recover. Only 15% feel the economy is getting worse.

	Aug 18-20	Aug 22-27	Aug 29-Sep 3
n=	varies		
	%	%	%
The economy continues to get worse	10	12	15
The economy is not worsening, but is also not recovering	43	42	38
The economy is starting to recover	44	41	43
Don't know/not sure	3	5	4

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

Base: Total sample

This week, there is a slight majority of Ontarians who are not confident about the economic recovery over the next year.

	Aug 18-20	Aug 22-27	Aug 29-Sep 3
n=	varies		
	%	%	%
TOTAL CONFIDENT	49	60	46
Very confident	16	15	10
Somewhat confident	33	45	36
Not too confident	34	20	29
Not at all confident	16	19	24
TOTAL NOT CONFIDENT	50	39	53
Not sure/Don't know	1	1	1

EXPECTED LENGTH OF THE ECONOMIC RECOVERY

Ontarians are very cautious about the expected length of an economic recovery: about 63% (up from 55% two weeks ago) expect it will take at least 24 months for the economy to recover.

	Aug 18-20	Aug 22-27	Aug 29-Sep 3
n=	varies		
	%	%	%
6 months or less	5	2	1
9 months	2	4	5
12 months	18	12	11
18 months	9	13	12
24 months	25	26	25
36 months or more	30	31	38
The economy will never fully recover	8	8	5
Don't know/not sure	3	5	3

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

Base: Total sample

Most Ontarians continue to favour infrastructure spending over tax spending in order to get the Ontario economy moving again.

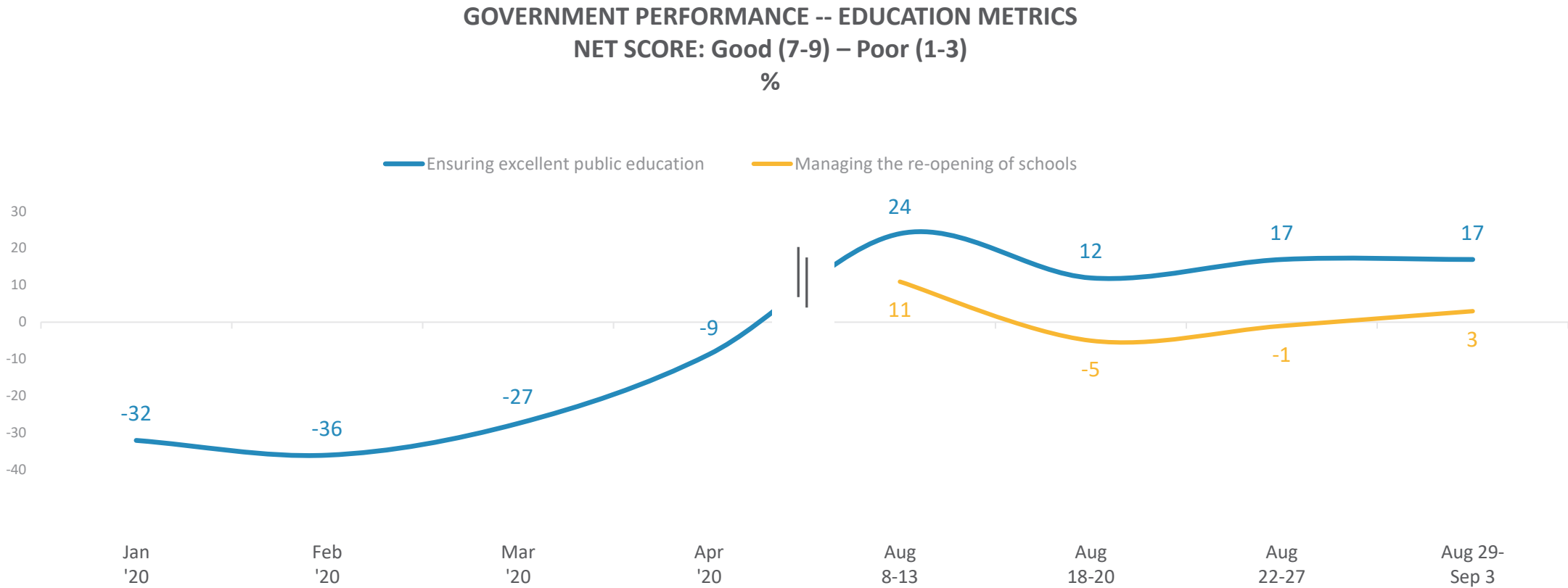
	Jun '20	Aug 29-Sep 3
n=	1617	310
	%	%
Across the board tax cuts designed to give Ontarians more spending power	34	27
Increased infrastructure spending designed to create more jobs	62	63
Don't know	5	10

When asked about specific initiatives, Ontarians seem to prefer tax relief to Ontario manufacturers and lower personal and business taxes.

% VERY/SOMEWHAT EFFECITVE	Aug 29-Sep 3
n=	310
	%
Giving tax relief to Ontario manufacturers	74
Lowering personal taxes for Ontario taxpayers	74
Lowering taxes for Ontario businesses	72
Providing financial assistance to Ontario companies to undertake R&D	70
Expanding public transit infrastructure systems	58
Initiating a buy-Ontario advertising campaign	54

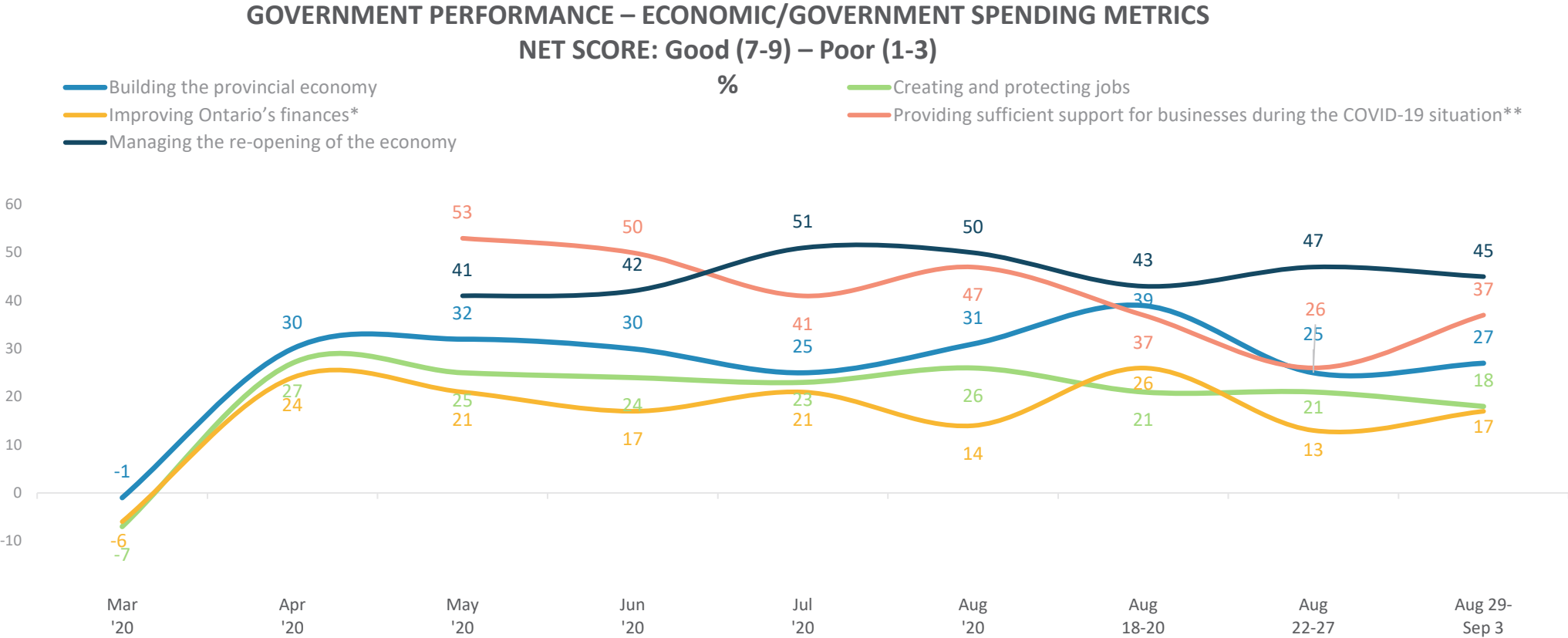
APPENDIX

Perceptions toward the government’s performance on ‘ensuring excellent public education’ and ‘managing the re-opening of schools’ remain 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

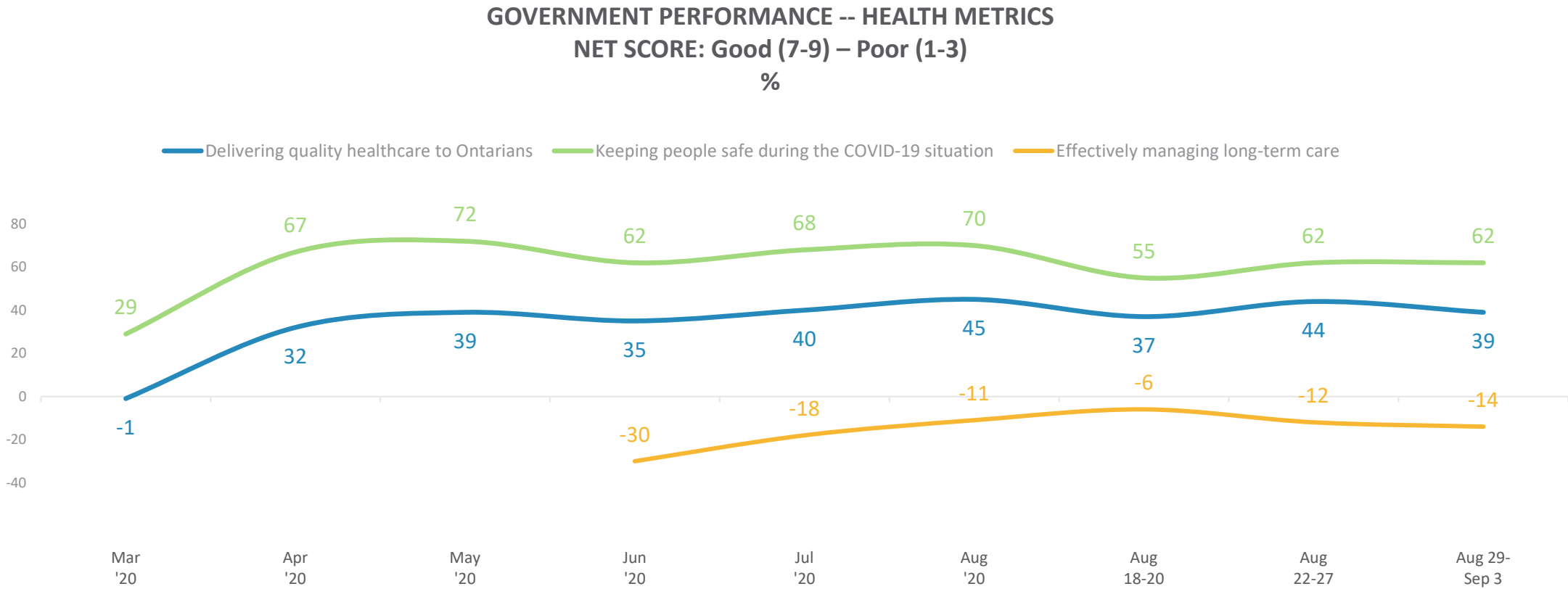
Perceptions toward the government’s performance continues to be strongest on ‘managing the re-opening of the economy’. There has been an uptick in the positive perceptions toward ‘sufficient support for businesses during the COVID-19 situation’.



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

Perceptions toward the government’s performance on ‘keeping people safe during the COVID-19 situation’ has been trending upwards, while its performance on ‘delivering quality healthcare’ and ‘managing long-term care’ remains 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