

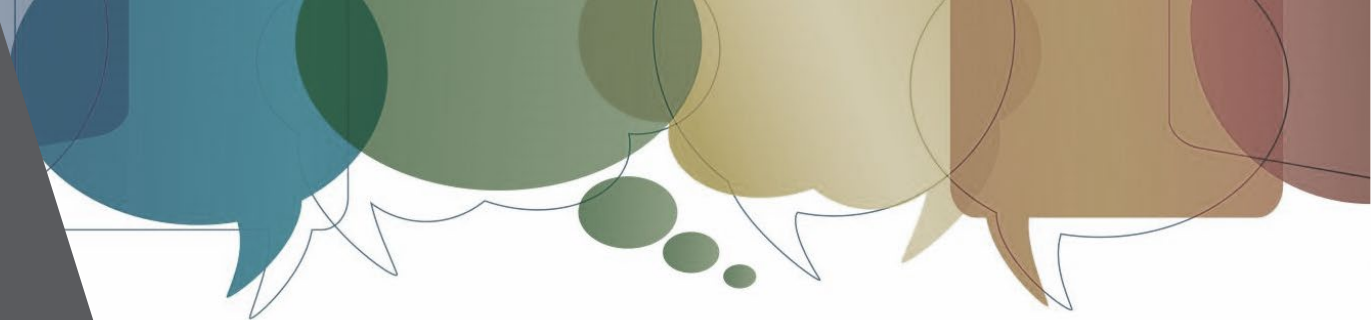


THE
**STRATEGIC
COUNSEL** 25

TORONTO | OTTAWA | CALGARY

www.thestrategiccounsel.com

EXPERIENCE • PASSION • CREATIVITY
CUSTOM SOLUTIONS FOR COMPLEX ISSUES



SEPTEMBER 2020 RESEARCH

PULSE REPORT ON COVID-19 – REPORT #47

CABINET OFFICE

September 11th 2020



KEY FINDINGS

Key Findings

1 Over the past week, the government's 'right track' scores jumped 8-points to 83% from 75%.

This rise is being driven particularly by women, suburban Toronto, Central Ontario, those with household incomes >\$100k, and born in Canada.

4 On the economic front, concern about the economic recession in Ontario has increased.

At the same time, Ontarians are less concerned about the doubling of the Ontario deficit. There has been an uptick in positive perceptions toward 'improving Ontario finances' as the news of the doubling of the provincial deficit fades.

2 Probably in response to increasing infection rates, Ontarians concerned about a second wave has risen to 69% compared to 51% four weeks ago.

The rise in infections in Ontario has caused a significant drop in the proportion of Ontarians who believe that COVID-19 is under control in the province.

Mirroring the perceptions about whether COVID-19 is under control, there has been a significant increase in the belief that Ontario is not over the worst of the pandemic.

5 Ontarians' trust in the government's messaging about the general 'COVID-19 situation' has bounced upward. This increase may reflect the government's direct, tough tone on the being safe and the behavior of Ontarians.

This strong messaging about protecting the health and safety of Ontarians seems to resonate.

3 Likely in response to strong government messaging, concerns about the health impact of the schools reopening has declined 15-points to 42% from 57%. Plus, fewer Ontarians think that the government is 'not doing much as they should' for the reopening of the schools.

6 There is strong support for teachers being declared essential workers. About 1-in-2 say they 'strongly' support this policy action.

Key Findings

7 Notwithstanding these concerns about the COVID-19 virus, fully 6-in-10 Ontarians still continue to feel the shift to Phase 3 is at the right pace. However, there has been a slight uptick (from 26% to 32%) among those who think the move to Phase 3 has been too quick.

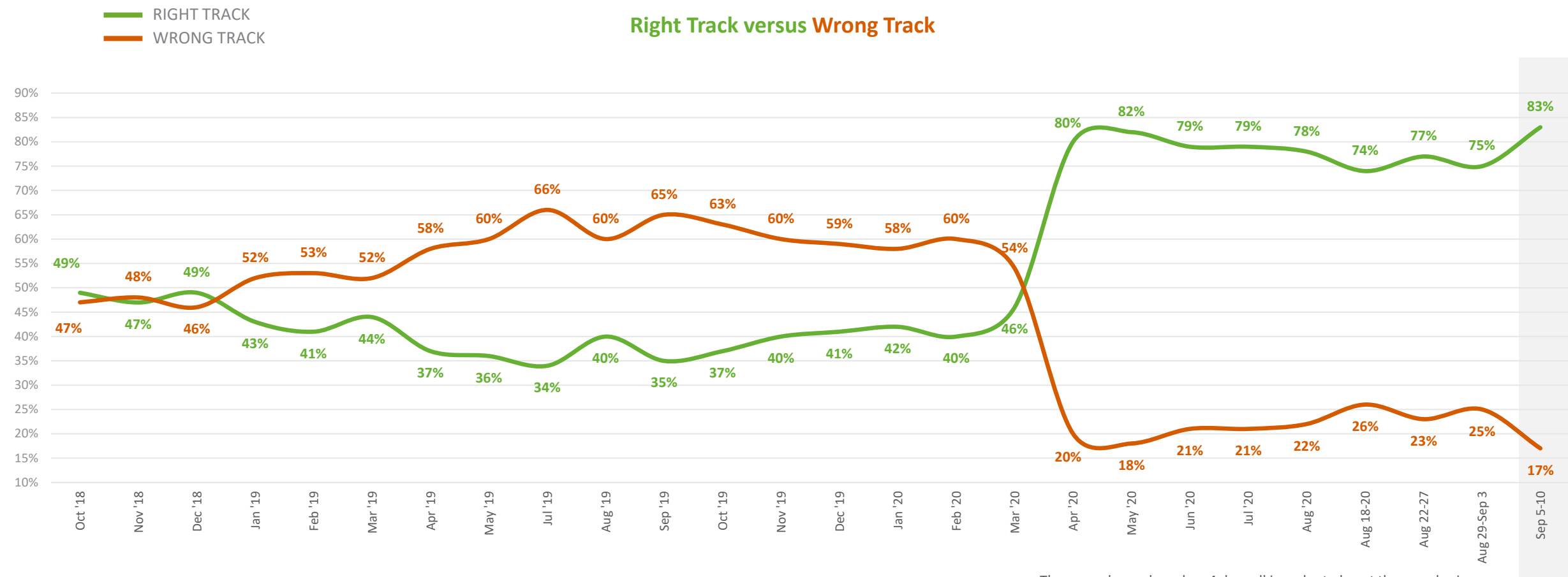
8 At a high level, most Ontarians continue to favour infrastructure spending over tax cuts in order to get the Ontario economy moving again.

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

RIGHT TRACK
WRONG TRACK

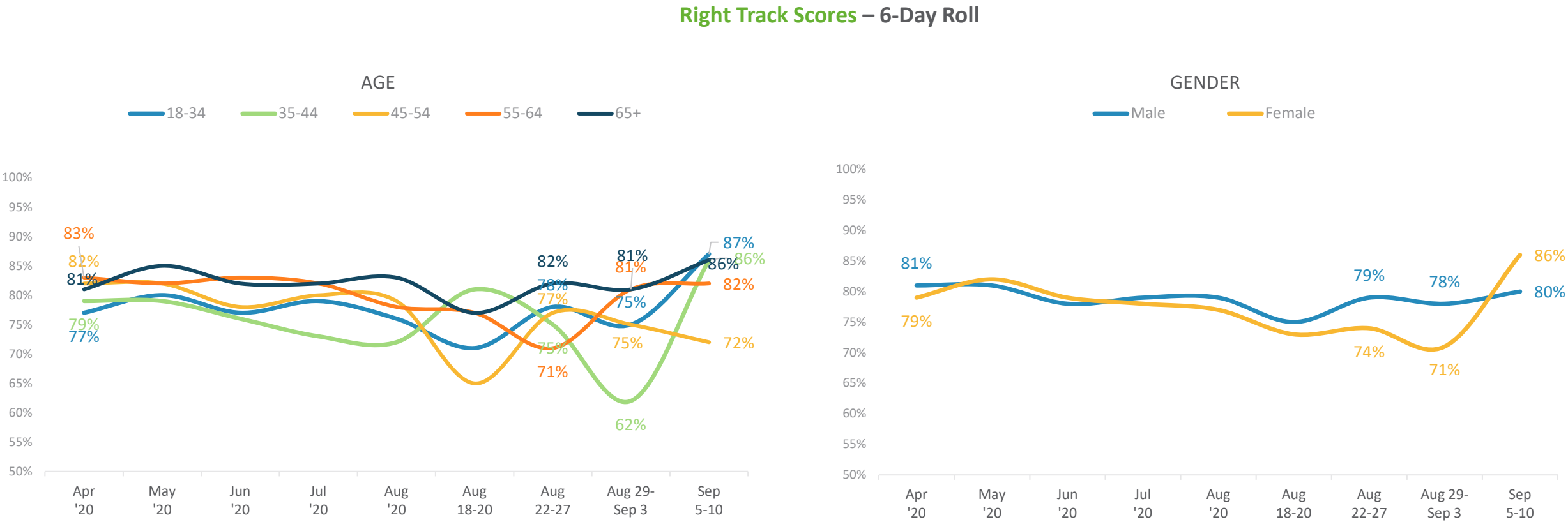


Over the past week, the government’s ‘right track’ scores jumped 8-points to 83%.



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 among women increased 15-points to 86%, probably coming from the public statements of the government on health safety of Ontarians.

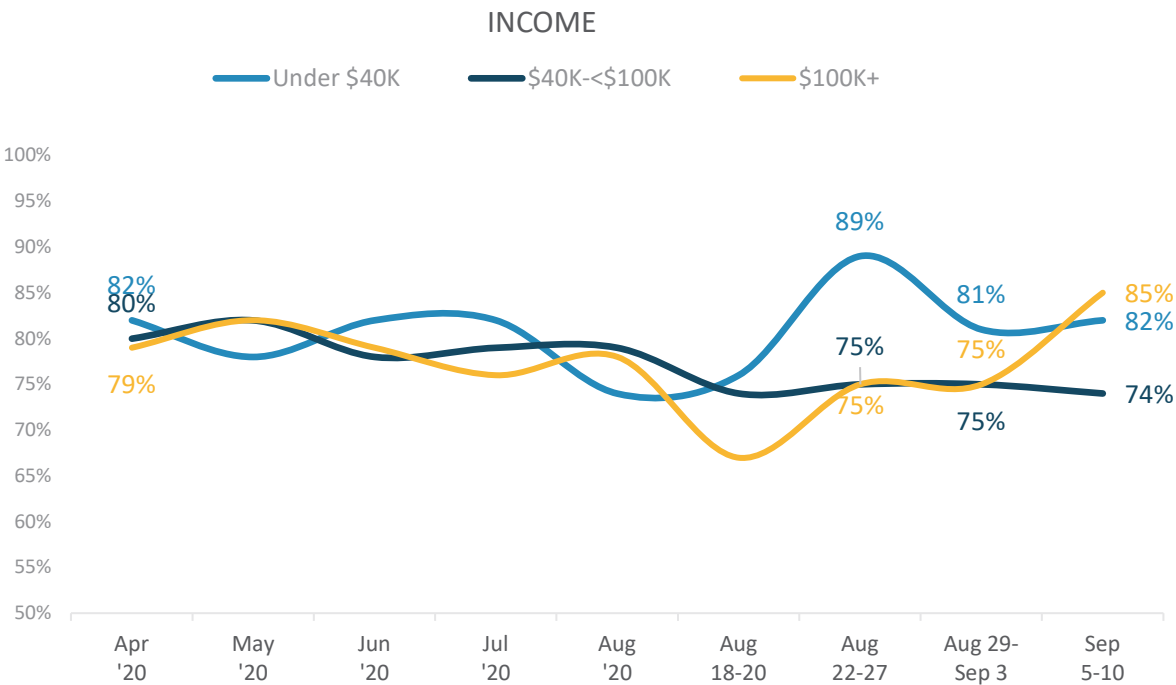
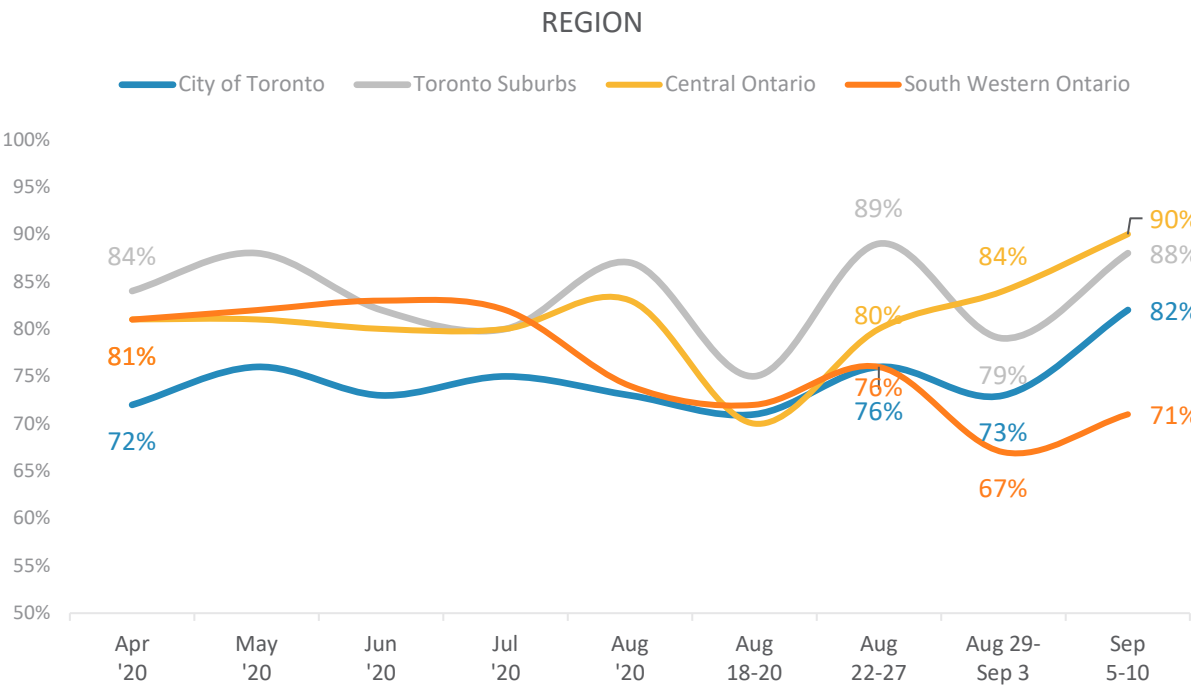


These graphs are based on 5 day roll in order to boost the sample sizes.

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

Given the rise in ‘right track’ scores, there were increases in the four regions.

Right Track Scores – 6-Day Roll

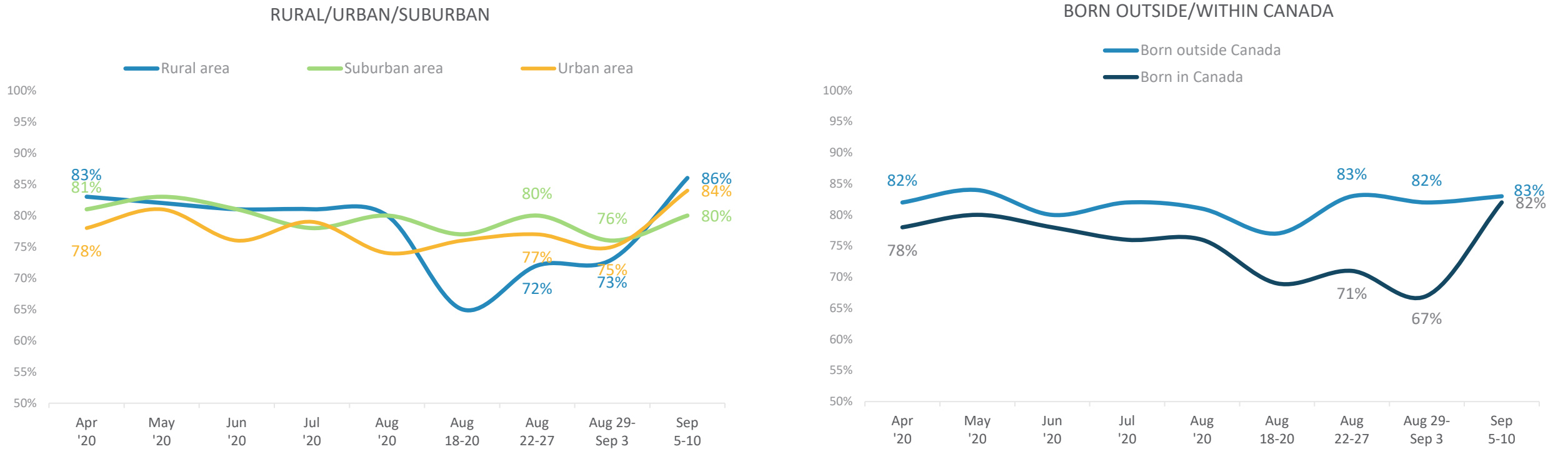


These graphs are based on 5 day roll in order to boost the sample sizes.

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

After dipping over several weeks, ‘right track’ scores rebounded by 15-points among those born in Canada. Moreover, the increases occurred in rural, suburban, and urban regions of Ontario.

Right Track Scores – 6-Day Roll



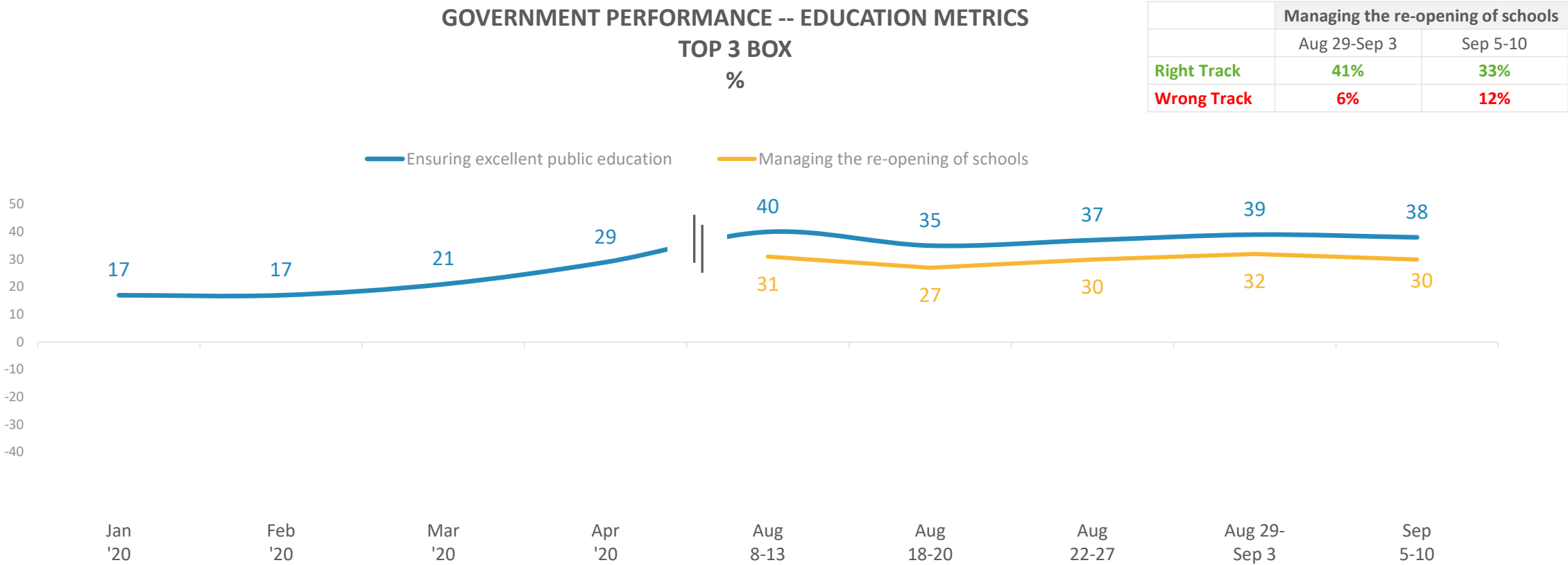
These graphs are based on 5 day roll in order to boost the sample sizes.

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

PERCEPTIONS OF GOVERNMENT PERFORMANCE DURING COVID-19 PANDEMIC

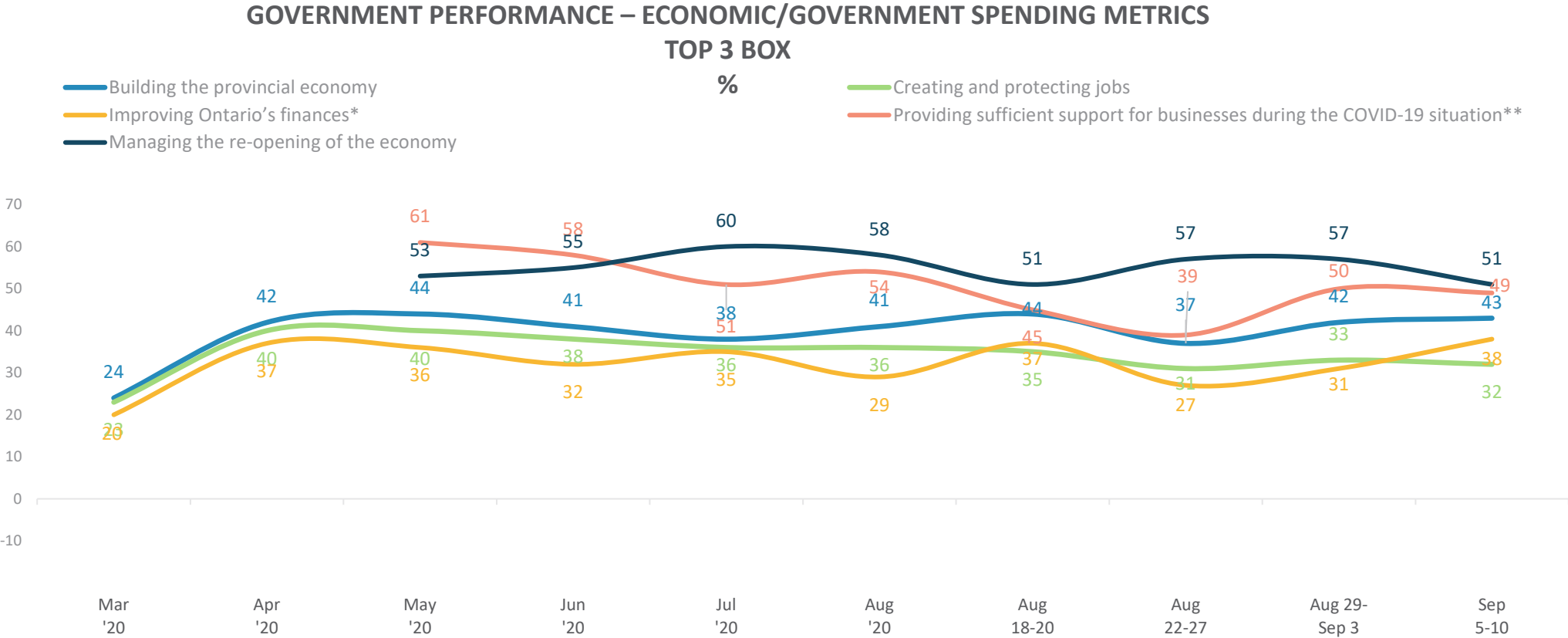


Positive perceptions toward the government’s performance on ‘ensuring excellent public education’ and ‘managing the re-opening of schools’ remains stable.



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

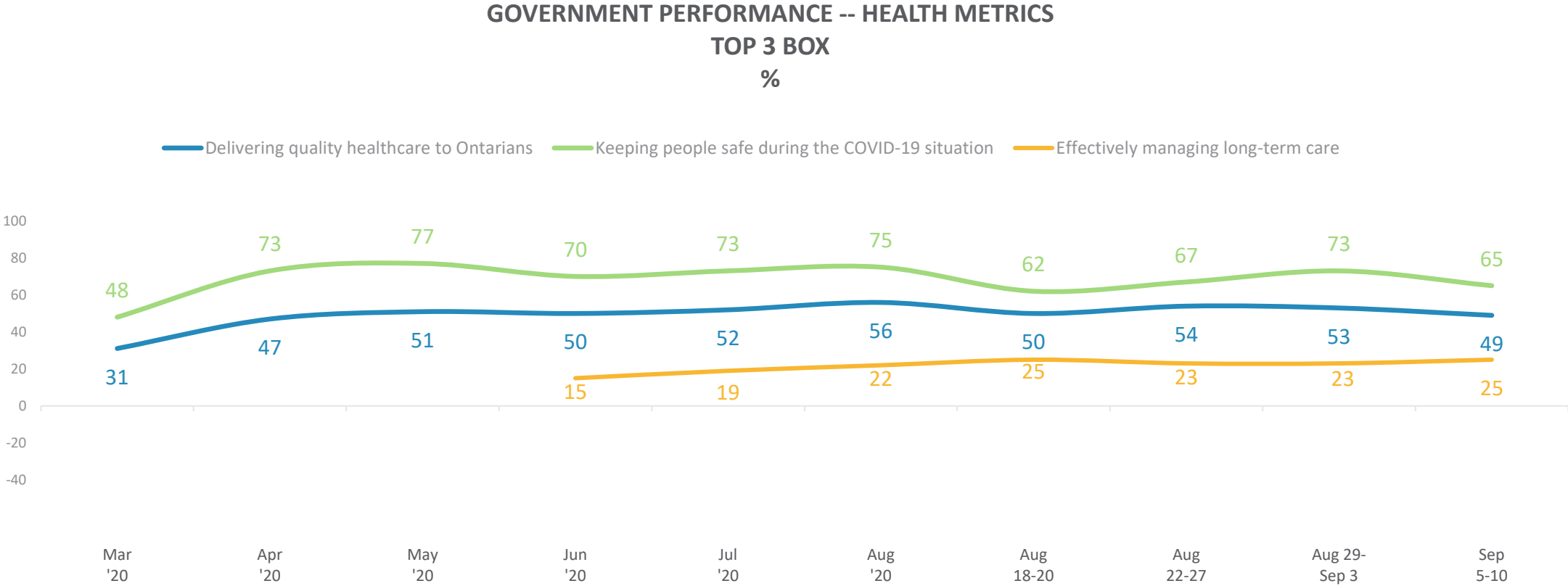
Perceptions toward the government’s performance continues to be strongest on ‘managing the re-opening of the economy’ but has dropped over the past week. There has been an uptick in positive perceptions toward ‘improving Ontario finances’ as the news of the doubling of the provincial deficit fades.



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”

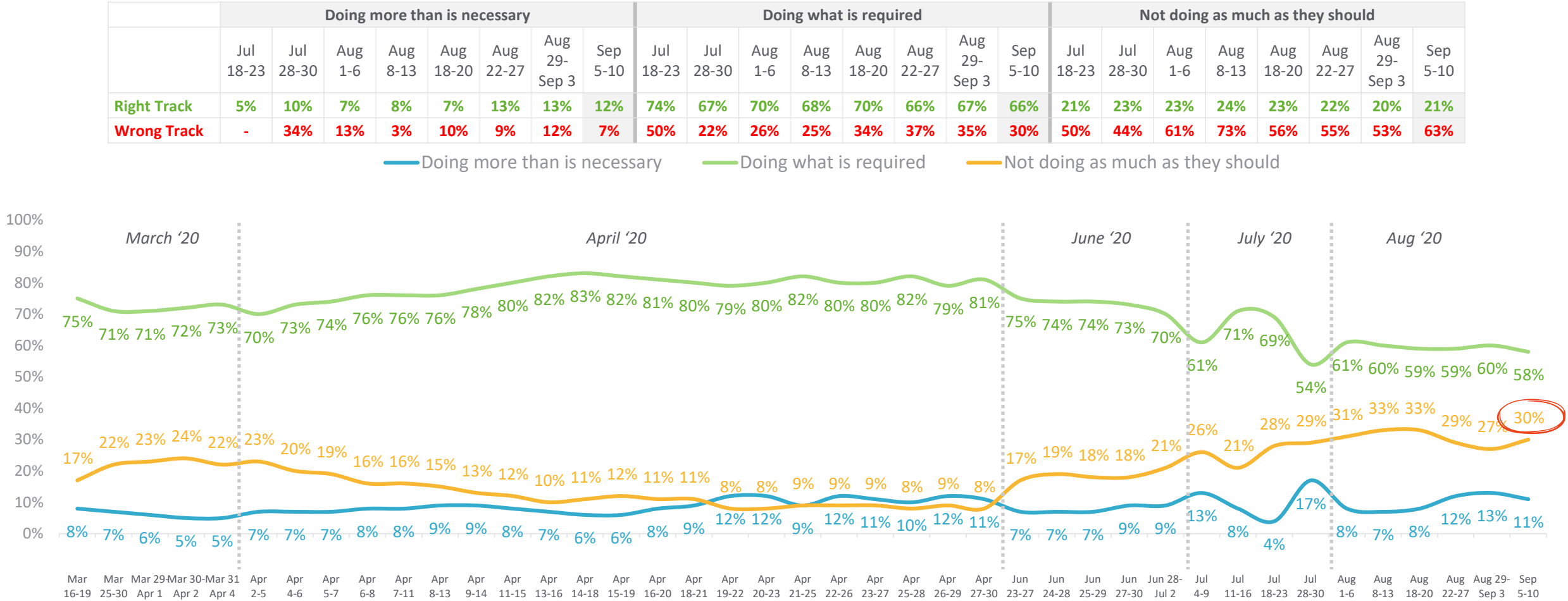
Bases vary

Positive perceptions toward the government’s performance on ‘keeping people safe during the COVID-19 situation’ has trended downwards, 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’. However, over the past two weeks, the proportion of Ontarians who share this view has dropped 8-points to 43%.

	% 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	Sep 5-10	Jul 18-23	Jul 28-30	Aug 1-6	Aug 8-13	Aug 18-20	Aug 22-27	Aug 29-Sep 3	Sep 5-10	Jul 18-23	Jul 28-30	Aug 1-6	Aug 8-13*	Aug 18-20	Aug 22-27	Aug 29-Sep 3	Sep 5-10
	%	%	%	%	%	%	%	%	%	%	%	%	%	%	%	%	%	%	%	%	%	%	%	%
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	17	72	67	70	69	68	72	70	68	14	10	16	10	7	13	12	14
Managing the process of gradually re-opening the province	11	11	6	15	15	9	13	4	71	68	75	70	68	75	67	72	18	21	13	13	15	15	18	17
Taking the necessary actions to prevent the spread of the virus	13	10	7	13	18	11	15	9	68	72	74	70	60	70	71	69	18	17	15	15	19	19	12	20
Planning for the return to school in the fall	7	9	6	13	12	9	9	5	48	37	38	32	39	31	39	37	35	43	52	50	43	51	47	43

TOP CONCERNS AT THIS POINT IN THE COVID-19 PANDEMIC

At this point, Ontarians concerned about a second wave of COVID-19 has increased to 69% compared to 51% four weeks ago. At the same time, concern about the health impact of the schools reopening has declined 15-points to 42% from 57%.

- Plus, concern about the economic recession has increased, while declining for the doubling of the Ontario deficit.

% VERY CONCERNED	Aug 18-20	Aug 22-27	Aug 29-Sep 3	Sep 5-10
n=	varies			
	%	%	%	%
The health impacts of the schools being reopened in September	55	57	47	42
A second wave of COVID-19 infections in the fall	51	55	56	69
That the Ontario economy is now officially in recession	41	45	47	48
The doubling of the provincial budget deficit in the past 5 months	35	38	39	32

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



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	Sep 5-10
n=	varies	
	%	%
<i>Teachers should be declared essential workers</i>		
TOTAL AGREE	70	71
Strongly agree	50	49
Somewhat agree	20	22
Neither agree nor disagree	6	4
Somewhat disagree	10	11
Strongly disagree	13	12
TOTAL DISAGREE	23	23
Not applicable	-	<1
Don't know	1	2
<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	69
Strongly agree	52	46
Somewhat agree	19	23
Somewhat disagree	10	13
Strongly disagree	15	14
TOTAL DISAGREE	26	27
Don't know	4	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?

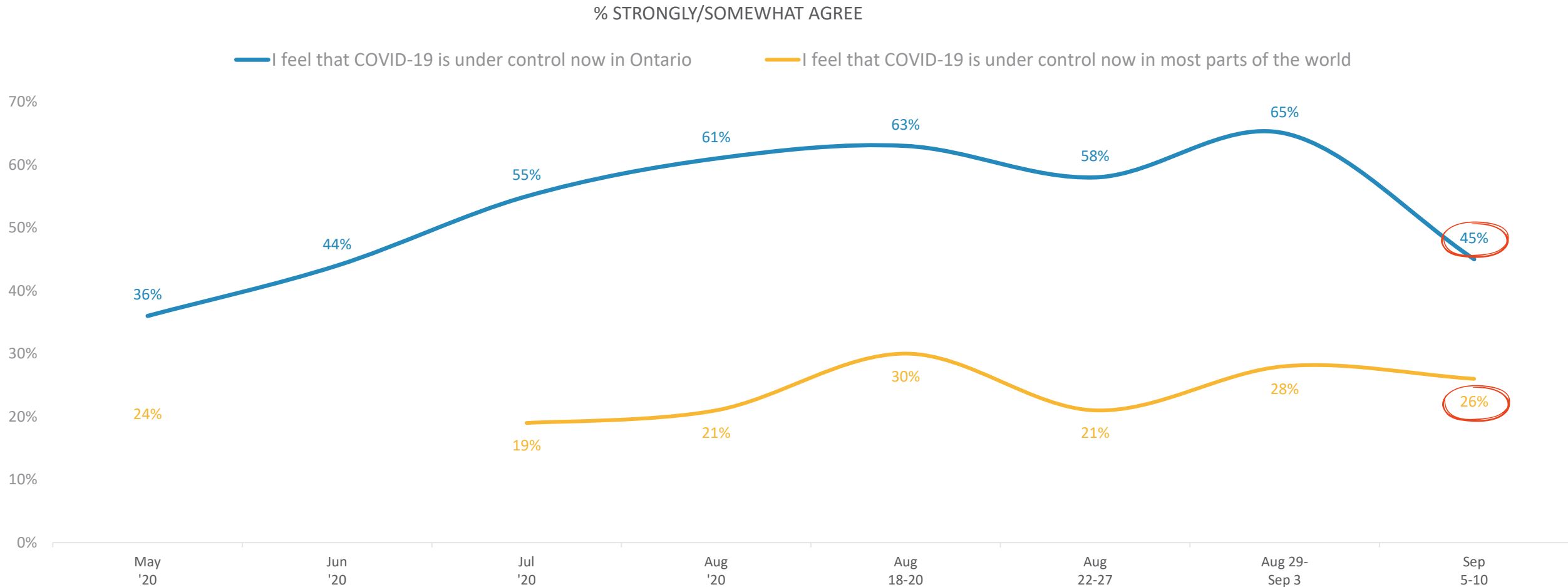
Base: Total sample, base varies (Aug 29-Sep 3 n=310)

COVID-19 INFECTIONS



PERCEPTIONS ABOUT WHETHER COVID-19 IS UNDER CONTROL

The rising infections in Ontario has caused a significant drop in the proportion of Ontarians who believe that COVID-19 is under control in the province.



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?

Mirroring the perceptions about whether COVID-19 is under control, there has been a significant increase in the belief that Ontario is not over the worst of the pandemic.

I believe Ontario is over the worst of the pandemic

	Aug 18-20	Aug 22-27	Aug 29-Sep 3	Sep 5-10
n=	varies			
	%	%	%	%
TOTAL AGREE	44	40	44	30
Strongly agree	14	21	27	14
Somewhat agree	30	19	17	15
Neither agree nor disagree	5	7	9	3
Somewhat disagree	19	21	16	30
Strongly disagree	28	30	28	35
TOTAL DISAGREE	47	51	43	65
Don't know	3	1	3	3

Notwithstanding these concerns about the COVID-19 virus, fully 6-in-10 Ontarians still continue to feel the shift to Phase 3 is at the right pace. However, there has been slight uptick (from 26% to 32%) 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	Sep 5-10
n=	300	300	260	310	300	310	310	300
	%	%	%	%	%	%	%	%
Moving too quickly	37	39	33	31	27	28	26	32
At the right pace	56	52	58	58	60	60	60	61
Moving too slowly	6	8	5	9	12	9	12	6
Prefer not to answer/Don't know	1	1	4	2	2	3	3	1

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

CONFIDENTIAL

There has been a significant drop over the past four weeks (from 71% to 43%) in the proportion of Ontarians who believe the threat of contracting COVID-19 is much less now.

- There has also been a drop in the proportion of Ontarians who are doing their best to get back to living in a normal pre-COVID-19 life.

% 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	Aug 18-20	Aug 22-27	Aug 29- Sep 3	Sep 5-10
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	58	57	52	43
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	75	76	82	72
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	68	72	70	66

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

Base: Total sample

MASK WEARING PERCEPTIONS



FREQUENCY OF FACE MASK WEARING

Perhaps in response to growing concerns about the spread of the virus, there has been an increase in face mask wearing: about 87%, a high point since June, say they wear a mask ‘all of the time’ or ‘most of the time’. Now, about 61% (another high 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	Aug 18-20	Aug 22-27	Aug 29-Sep 3	Sep 5-10
n=	313	400	400	410	410	410	410	410	410	300	300	300	300	260	310	300	310	310	300
	%	%	%	%	%	%	%	%	%	%	%	%	%	%	%	%	%	%	%
TOTAL ALL/MOST OF THE TIME	52	52	52	52	54	55	58	58	60	60	72	76	77	73	81	80	84	81	87
All of the time	26	27	27	23	25	25	25	29	29	22	45	42	47	48	56	49	55	54	61
Most of the time	26	25	26	29	29	31	33	29	32	38	27	34	29	24	25	30	29	28	26
Some of the time	26	26	28	28	26	25	24	26	24	20	20	17	15	17	13	14	11	12	12
Rarely	19	18	15	17	17	16	15	12	13	18	5	7	7	9	5	4	4	5	1
Never	4	3	4	3	3	4	3	3	3	3	2	1	1	1	1	2	1	1	<1
RARELY/NEVER	23	21	20	20	20	20	18	15	16	21	7	8	8	10	6	6	5	6	1

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



About one-third hold some misperceptions about the COVID-19 virus being similar to flu viruses. About 42% (up from 31%) believe that flu vaccinations provide some protection from other viruses including COVID-19.

	Aug 29-Sep 3	Sep 5-10
n=	varies	
	%	%
<i>I believe that COVID-19 virus is similar to flu viruses</i>		
TOTAL AGREE	36	32
Strongly agree	17	12
Somewhat agree	19	19
Neither agree nor disagree	4	3
Somewhat disagree	17	15
Strongly disagree	41	48
TOTAL DISAGREE	57	63
Don't know	3	2
<i>Getting the flu vaccination provides some protection from other viruses including COVID-19</i>		
TOTAL AGREE	31	42
Strongly agree	18	20
Somewhat agree	13	22
Neither agree nor disagree	4	3
Somewhat disagree	15	13
Strongly disagree	43	37
TOTAL DISAGREE	58	50
Don't know	6	4

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

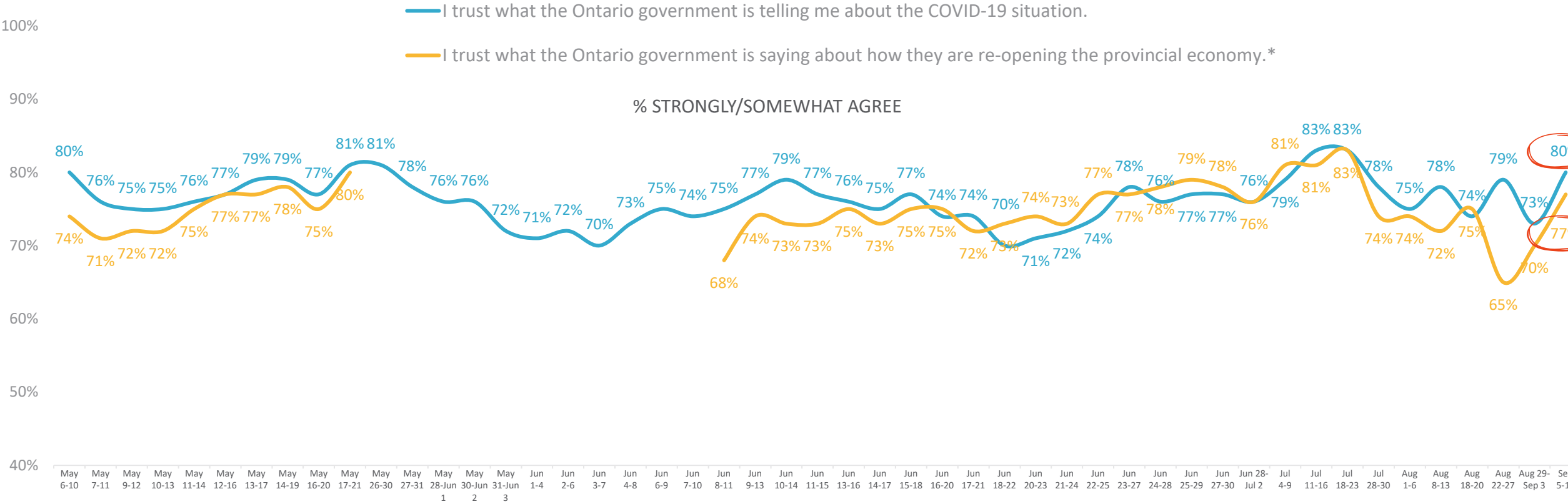
Base: Total sample, base varies
CONFIDENTIAL

CONFIDENCE IN GOVERNMENT COVID-19 MESSAGING



TRUST IN THE GOVERNMENT’S COMMUNICATIONS ABOUT COVID-19

Ontarians’ trust in the government’s messaging about the general ‘COVID-19 situation’ bounced upward. This upward shift may reflect the direct, tough tone on the safety and protection of Ontarians.



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 are a bit less likely to say they would spend as much as they would normally.

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	Sep 5-10
n=	300	260	310	300	310	310	300
	%	%	%	%	%	%	%
Spending more than you would normally	14	15	20	18	19	12	22
Spending about as much as you would normally	40	29	35	30	41	45	38
Spending less than you would normally	45	54	43	52	38	42	40
Don't know	2	2	2	<1	2	1	<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

CONFIDENTIAL

ONTARIO ECONOMY



Most Ontarians consistently 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	Sep 5-10
n=	varies			
	%	%	%	%
TOTAL NECESSARY	85	89	83	91
Very necessary	56	47	52	53
Somewhat necessary	29	42	31	38
Not too necessary	6	2	8	5
Not at all necessary	5	5	4	1
TOTAL NOT NECESSARY	11	7	12	6
Not sure/Don't know	4	4	5	3

Ontarians are divided on the current state of the economy: 36% feel the economy is not worsening, but it is not getting better; while 49% say that the economy is starting to recover. Only 12% feel the economy is getting worse.

	Aug 18-20	Aug 22-27	Aug 29-Sep 3	Sep 5-10
n=	varies			
	%	%	%	%
The economy continues to get worse	10	12	15	12
The economy is not worsening, but is also not recovering	43	42	38	36
The economy is starting to recover	44	41	43	49
Don't know/not sure	3	5	4	3

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 confident about the economic recovery over the next year.

	Aug 18-20	Aug 22-27	Aug 29-Sep 3	Sep 5-10
n=	varies			
	%	%	%	%
TOTAL CONFIDENT	49	60	46	55
Very confident	16	15	10	13
Somewhat confident	33	45	36	42
Not too confident	34	20	29	24
Not at all confident	16	19	24	19
TOTAL NOT CONFIDENT	50	39	53	43
Not sure/Don't know	1	1	1	2

EXPECTED LENGTH OF THE ECONOMIC RECOVERY

Ontarians are very cautious about the expected length of an economic recovery: about 58% expect it will take at least 24 months for the economy to recover.

	Aug 18-20	Aug 22-27	Aug 29-Sep 3	Sep 5-10
n=	varies			
	%	%	%	%
6 months or less	5	2	1	3
9 months	2	4	5	5
12 months	18	12	11	13
18 months	9	13	12	12
24 months	25	26	25	25
36 months or more	30	31	38	33
The economy will never fully recover	8	8	5	2
Don't know/not sure	3	5	3	6

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 cuts in order to get the Ontario economy moving again.

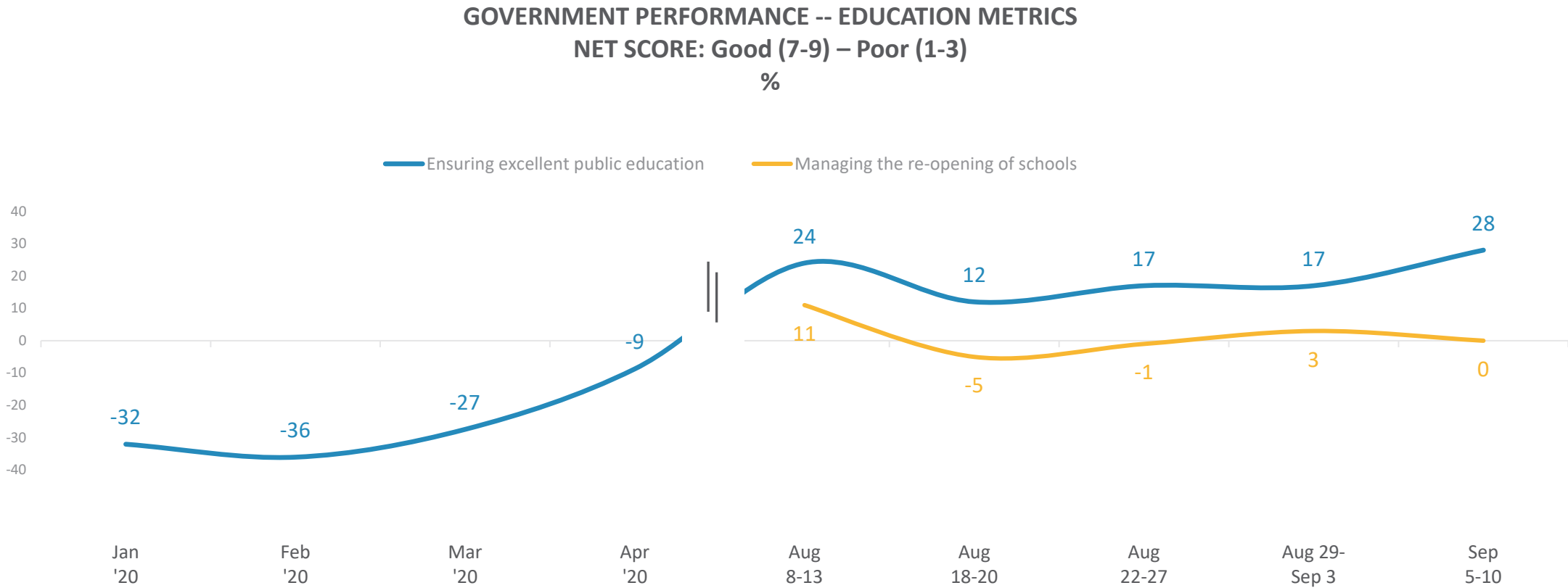
	Jun '20	Aug 29-Sep 3	Sep 5-10
n=	1617	310	300
	%	%	%
Across the board tax cuts designed to give Ontarians more spending power	34	27	22
Increased infrastructure spending designed to create more jobs	62	63	67
Don't know	5	10	11

When asked about specific initiatives, Ontarians seem to prefer tax relief for Ontario manufacturers, lower personal and business taxes, and financial assistance to Ontario companies to undertake R&D.

% VERY/SOMEWHAT EFFECITVE	Aug 29-Sep 3	Sep 5-10
n=	310	300
	%	%
Giving tax relief to Ontario manufacturers	74	72
Lowering personal taxes for Ontario taxpayers	74	70
Lowering taxes for Ontario businesses	72	74
Providing financial assistance to Ontario companies to undertake R&D	70	75
Expanding public transit infrastructure systems	58	61
Initiating a buy-Ontario advertising campaign	54	61

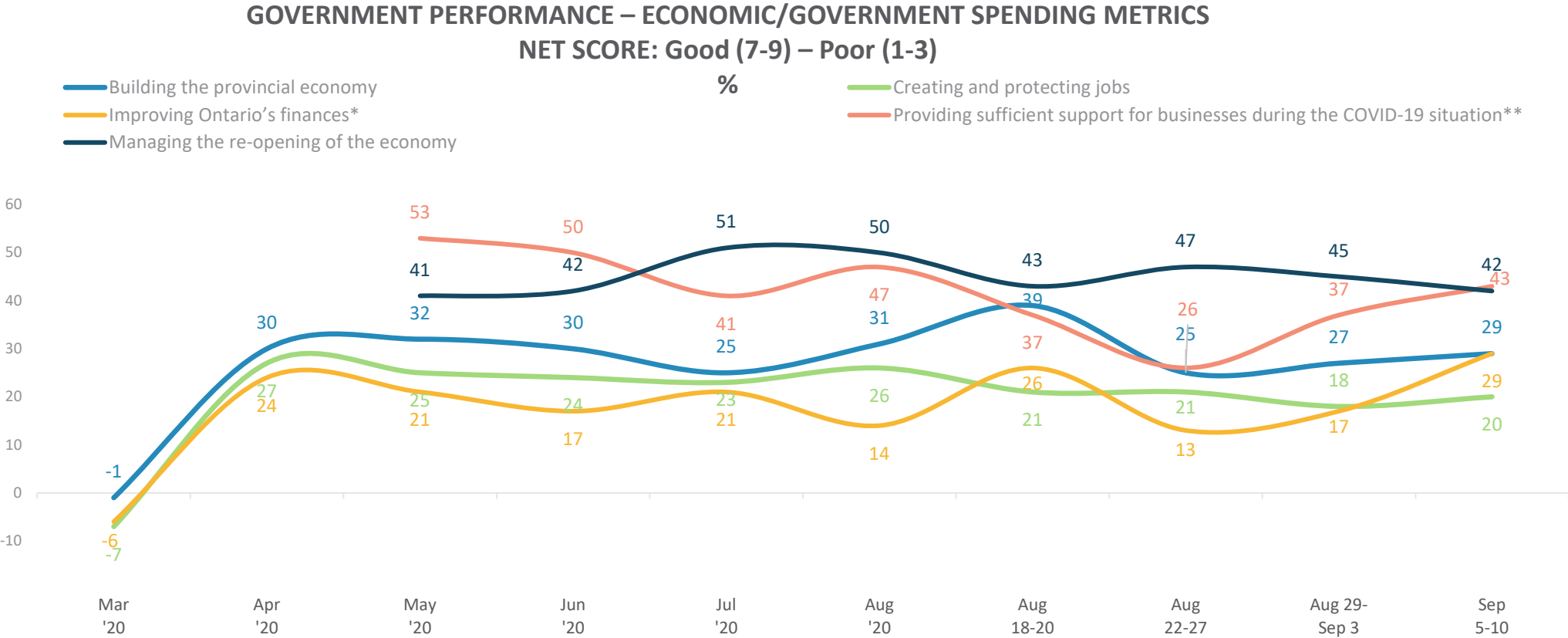
APPENDIX

Perceptions toward the government’s performance on ‘ensuring excellent public education’ has reached its highest point, while views on ‘managing the re-opening of schools’ 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

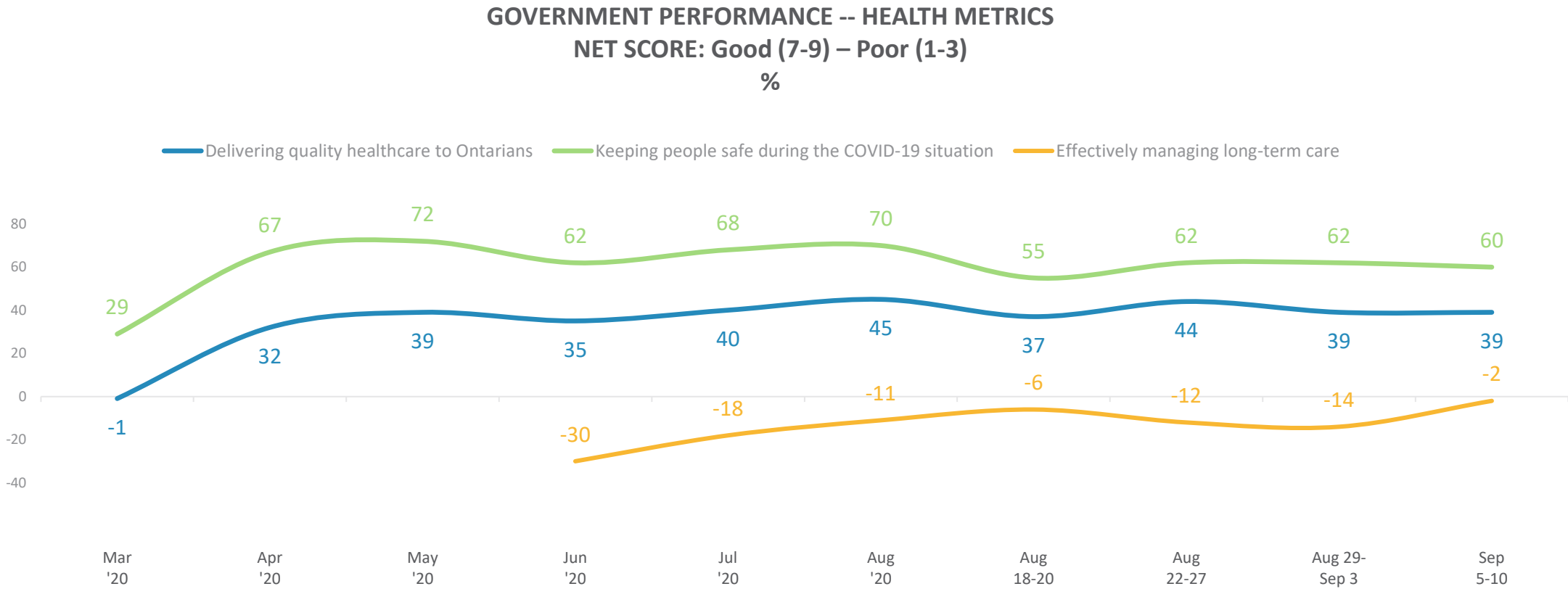
Perceptions toward the government’s performance on ‘managing the re-opening of the economy’ is dipping, while public views on ‘sufficient support for businesses during the COVID-19 situation’ and ‘improving Ontario’s finances’ have improved.



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’ and on ‘delivering quality healthcare’ are stable, while there has been trending upwards 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