



COVID-19 RECOVERY

MINISTRY OF HERITAGE SPORT, TOURISM AND CULTURE INDUSTRIES

CONSUMER SENTIMENT AND BEHAVIOUR SURVEY (MAY 29-31, 2020)

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Survey Methodology

An online survey was conducted between May 29 and 31, 2020.

For this survey, a sample of n=501 Ontarians aged 18+ was interviewed online.

Quotas and weighting were employed to ensure that the sample's composition reflects that of the Ontario population according to census parameters.

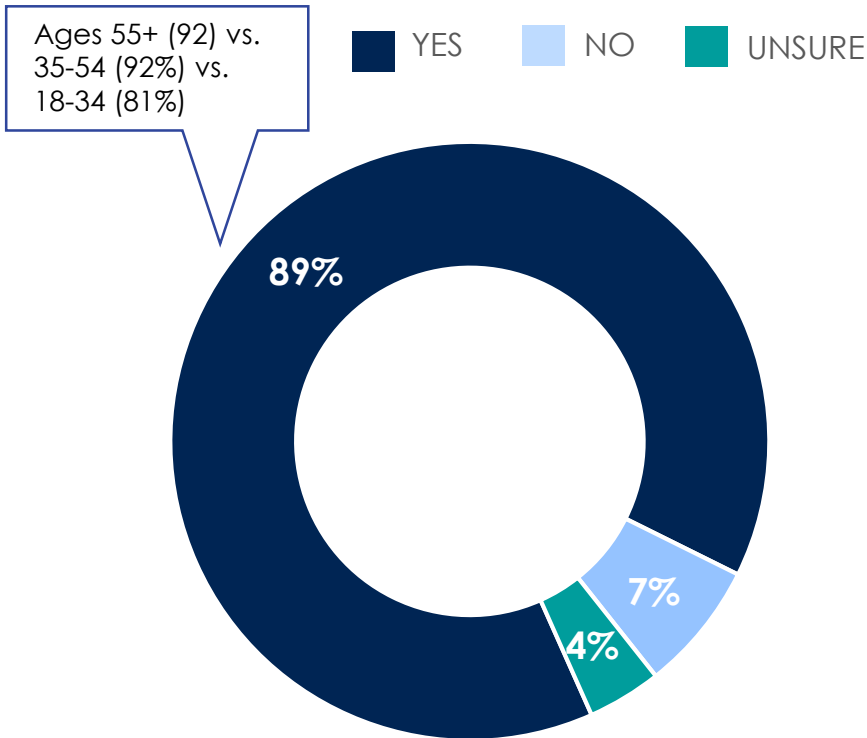
The precision of Ipsos online surveys is measured using a credibility interval. In this case, the poll is accurate to within ± 5.0 percentage points, 19 times out of 20, had all Canadians aged 18+ been polled. The credibility interval will be wider among subsets of the population.

All sample surveys and polls may be subject to other sources of error, including, but not limited to coverage error, and measurement error.



Stage One Reopen Our Province

Most Ontarians have heard Ontario has announced Stage One of the Reopening Framework.

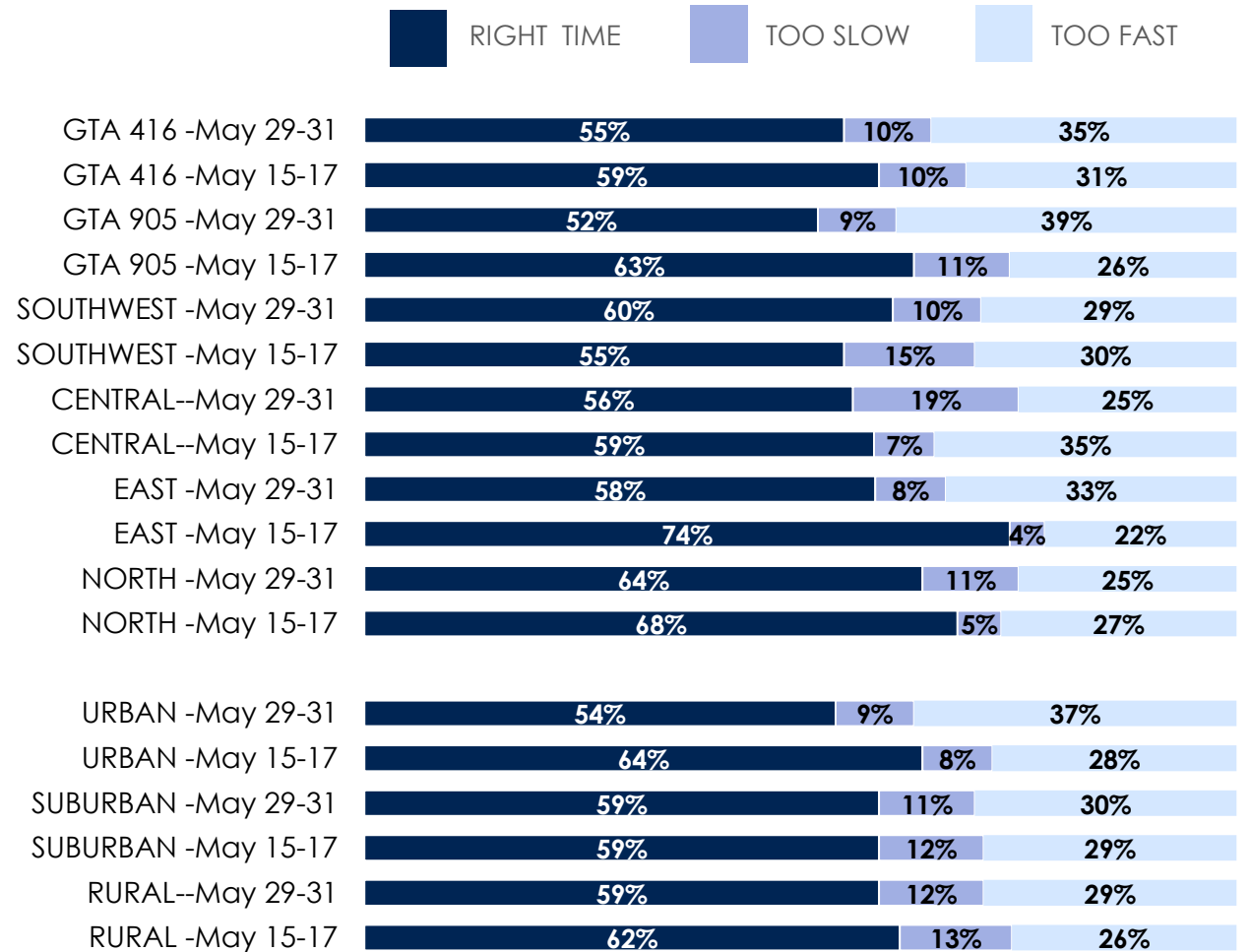
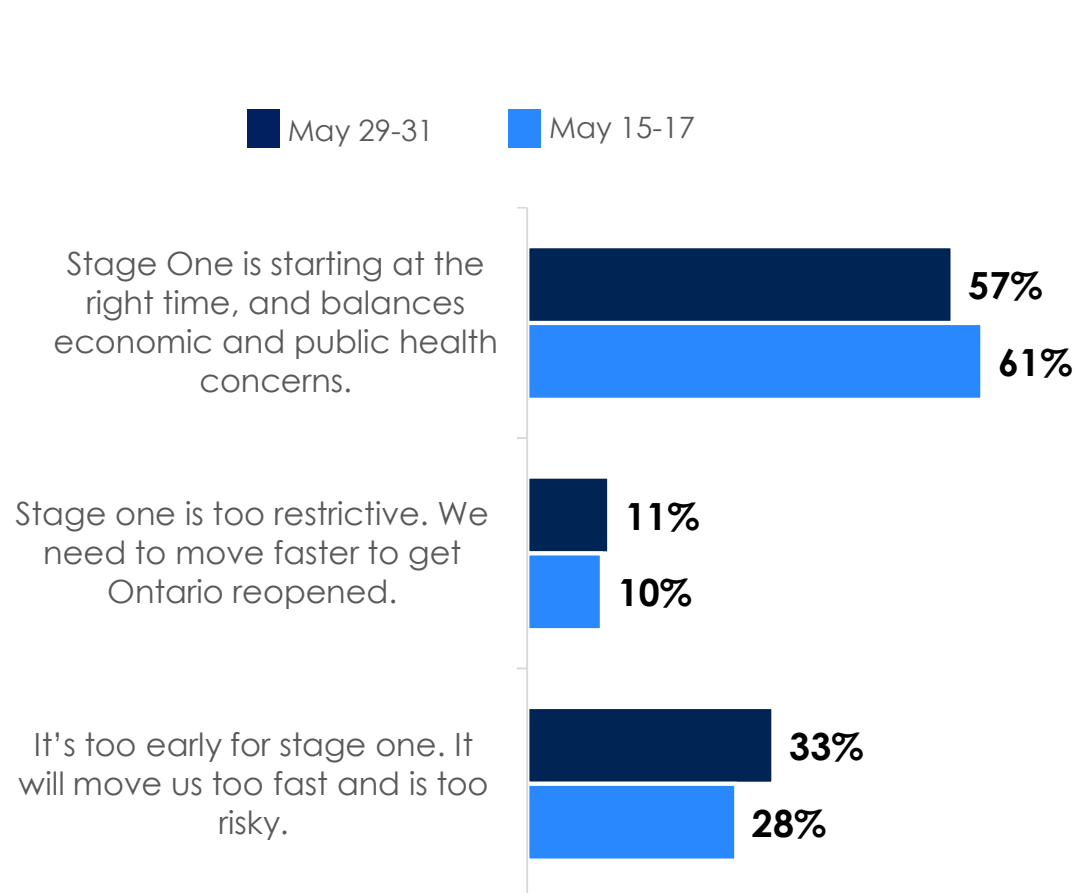


This week the Government of Ontario announced Stage One of its Framework for Reopening Our Province. Stage One, which begins on Tuesday, May 19, will allow certain workplaces to reopen if they are able to follow public health advice. This includes retail, construction, and seasonal activities, like golf courses. Other workplaces will remain closed until it's safe to reopen based on public health advice.

5b. Have you heard about stage one of the Framework to reopen the province? Base: All respondents (May 15-17 n=401).

Speed of Reopening

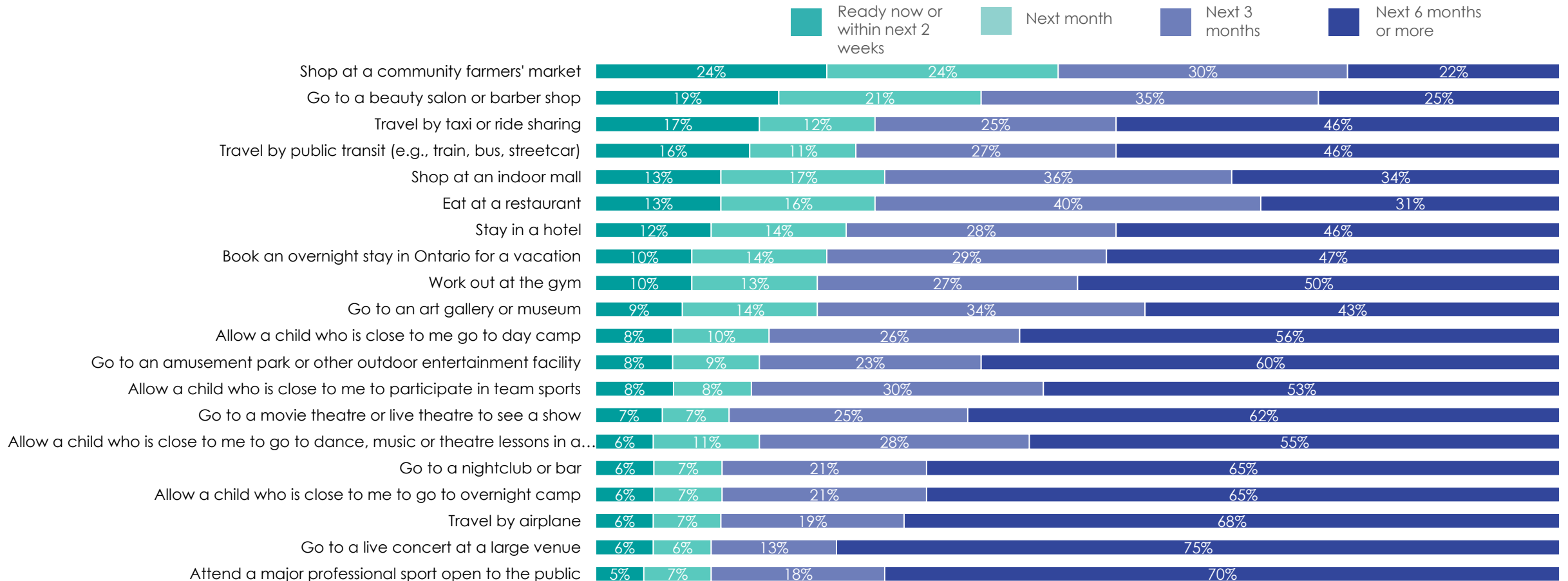
Most believe reopening is moving at **right** pace. Those who believe pace is too quick outnumber those who say it is too slow 3:1.



Q1a. The Government of Ontario recently announced Stage One of its Framework for Reopening Our Province, which began on May 19. Stage One allows certain workplaces to reopen if they are able to follow public health advice. This includes retail, construction, and seasonal activities, like golf courses. Other workplaces will remain closed until it's safe to reopen based on public health advice. Which of the following is closest to your personal point of view about Ontario's Framework for Reopening? (May 15-17 n=401, May 29-31 n=501)

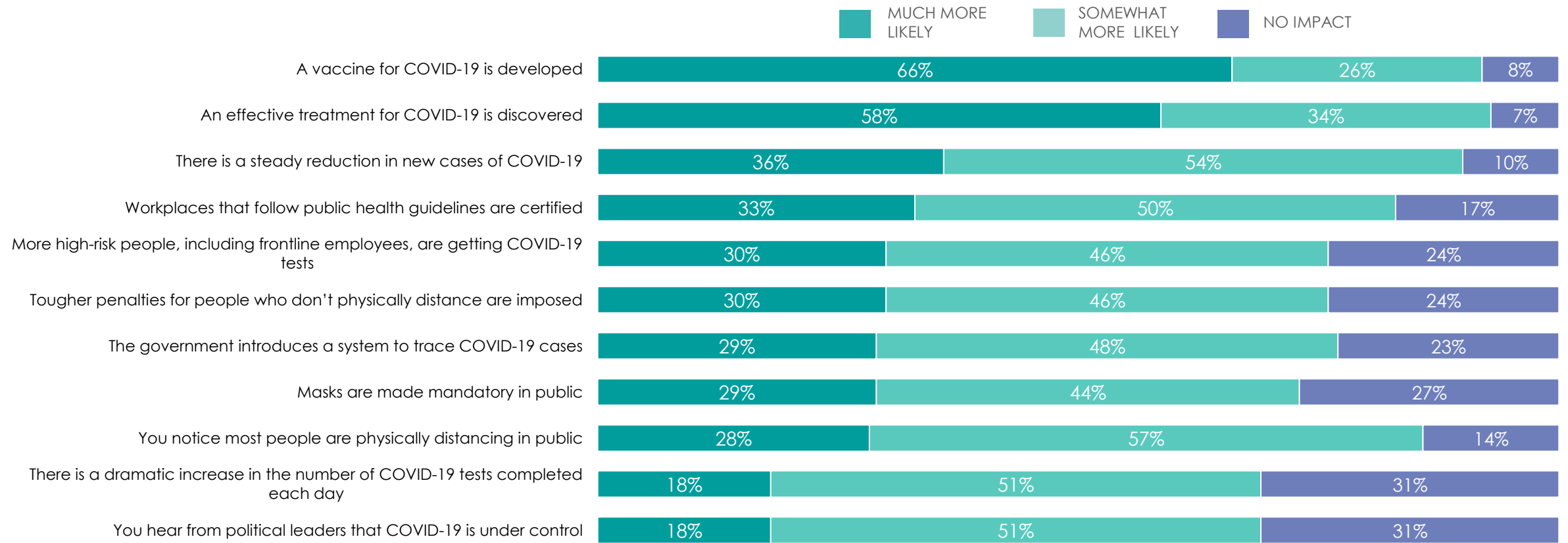
Comfort With Resuming Activities

While there is some variation between activities, the majority of the population does not anticipate being ready to resume regular activities this summer (within the next 3 months). Three months is the prevailing view on the earliest they will re-start most activities. Most Ontarians do not anticipate being comfortable to going to a bar or nightclub, travelling by airplane, going to a large venue or large sporting event for 6 months or more. Half to six in ten do not think they will allow a child close to them to go to day or overnight camp for 6 months at least.



Impact Of Protective Measures

Having a vaccine or effective treatment for COVID-19 are the strongest motivators to resuming normal activities. However, just about every other intervention tested moves some of those reluctant. Most Ontarians (72%) say they would be much more likely to resume activities based on at least one of these (excluding vaccine or treatment) -- suggesting a possible combination of interventions could move a significant number of people. The most effective are fewer cases being reported and enforcement of public health guidelines by imposing a certification process for businesses,. Noticing that people are adhering to physical distancing is a motivation for many. Interestingly, increased testing is not as motivating as other intervention options.



Summary

Awareness of Stage 1 universal.

Public confident with present pace of reopening. More concern with too fast than too slow.

Little regional variation in opinions.

Ontarians remain reluctant to reengage with economy and society. Similar to comparative markets.

Desire – Risk = Time

Combination of risk mitigation measures increases speed of reengaging.

Contact

Darrell Bricker
Global CEO
Ipsos Public Affairs

Darrell.bricker@ipsos.com



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