

# *Public Opinion Research* ▶▶ **Canada This Month**

*February 2018*

*Field Dates: October 26th to November 8th, 2017*  
*Sample Size: n=1,200*

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# Methodology & Demographics

# Methodology

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- These are the findings of a values study Innovative Research Group (INNOVATIVE) conducted from October 26<sup>th</sup> to November 8<sup>th</sup>, 2017 with topline vote findings from our latest poll, fielded January 11<sup>th</sup> to January 17<sup>th</sup> (n=2,315 unweighted; n=1200 weighted).
- This October survey of 2,777 adult Canadians was conducted on INNOVATIVE's Canada 20/20 national research panel with additional sample from Survey Sampling International, a leading provider of online sample. The results are weighted to n=1,200 based on the most recent Census data from Statistics Canada.
- The Canada 20/20 Panel is recruited from a wide variety of sources to reflect the age, gender, and region characteristics of the country as a whole. Each survey is administered to a series of randomly selected samples from the panel and weighted to ensure that the overall sample's composition reflects that of the actual Canadian population according to Census data to provide results that are intended to approximate a probability sample.
- INNOVATIVE provides each panellist with a unique URL via an email invitation so that only invited panel members are able to complete the survey, and panel members can only complete a particular survey once.
- This is a representative sample. We have set targets to ensure we properly reflect key regional and demographic distribution and then used weights to ensure we reflect the country properly. However, since the online survey was not a random probability based sample, a margin of error can not be calculated. The Marketing Research and Intelligence Association prohibits statements about margins of sampling error or population estimates with regard to most online panels.

**Note:** *Graphs and tables may not always total 100% due to rounding values rather than any error in data. Sums are added before rounding numbers.*

# Regions: Where did respondents come from?

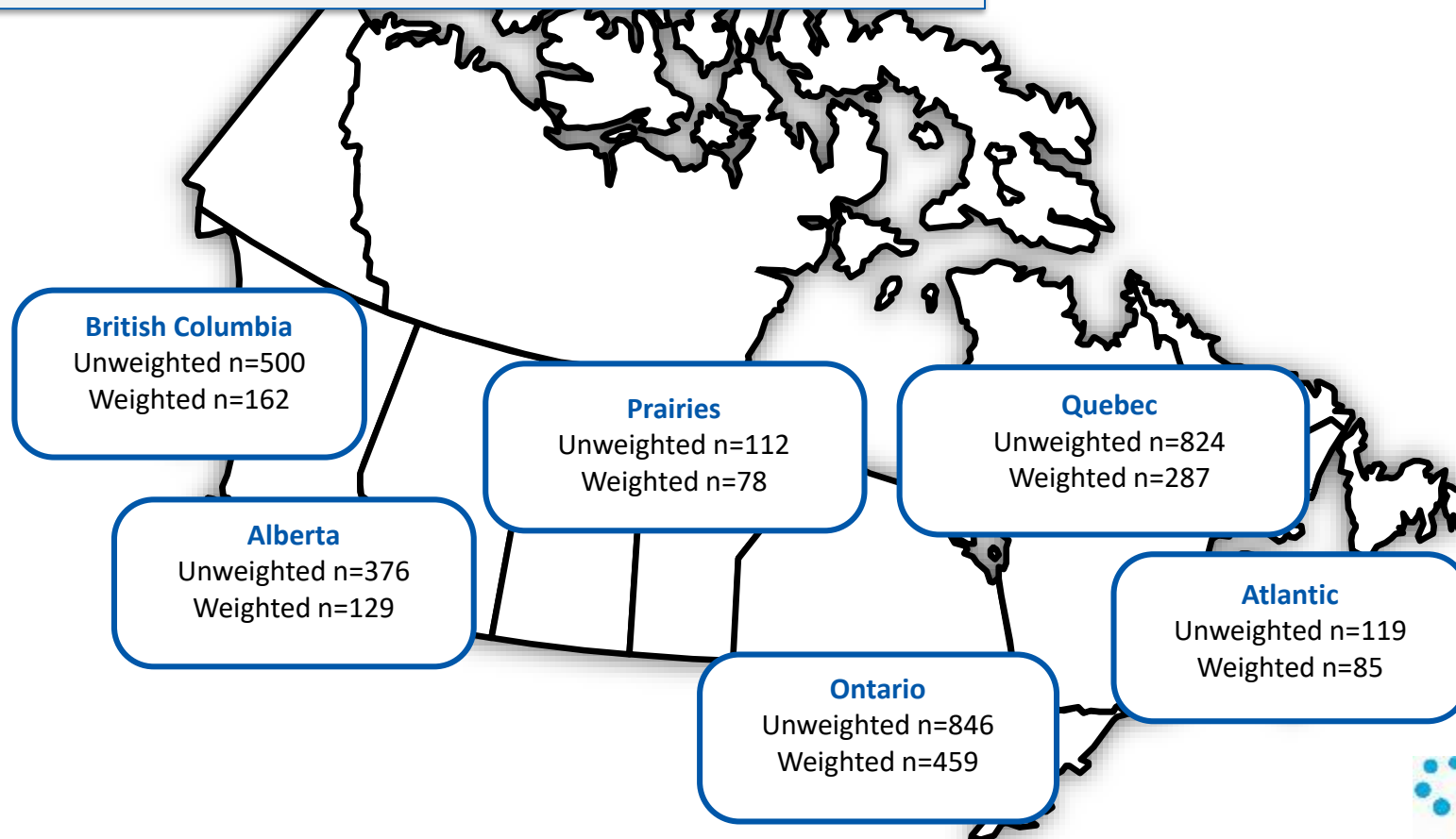
Regional groupings include:

- British Columbia (Yukon)
- Alberta (Northwest Territories)
- Prairie Region (Manitoba, Saskatchewan and Nunavut)
- Ontario
- Quebec
- Atlantic (PEI, New Brunswick, Nova Scotia and Newfoundland & Labrador)

## National

Unweighted n= 2,777

Weighted n=1,200

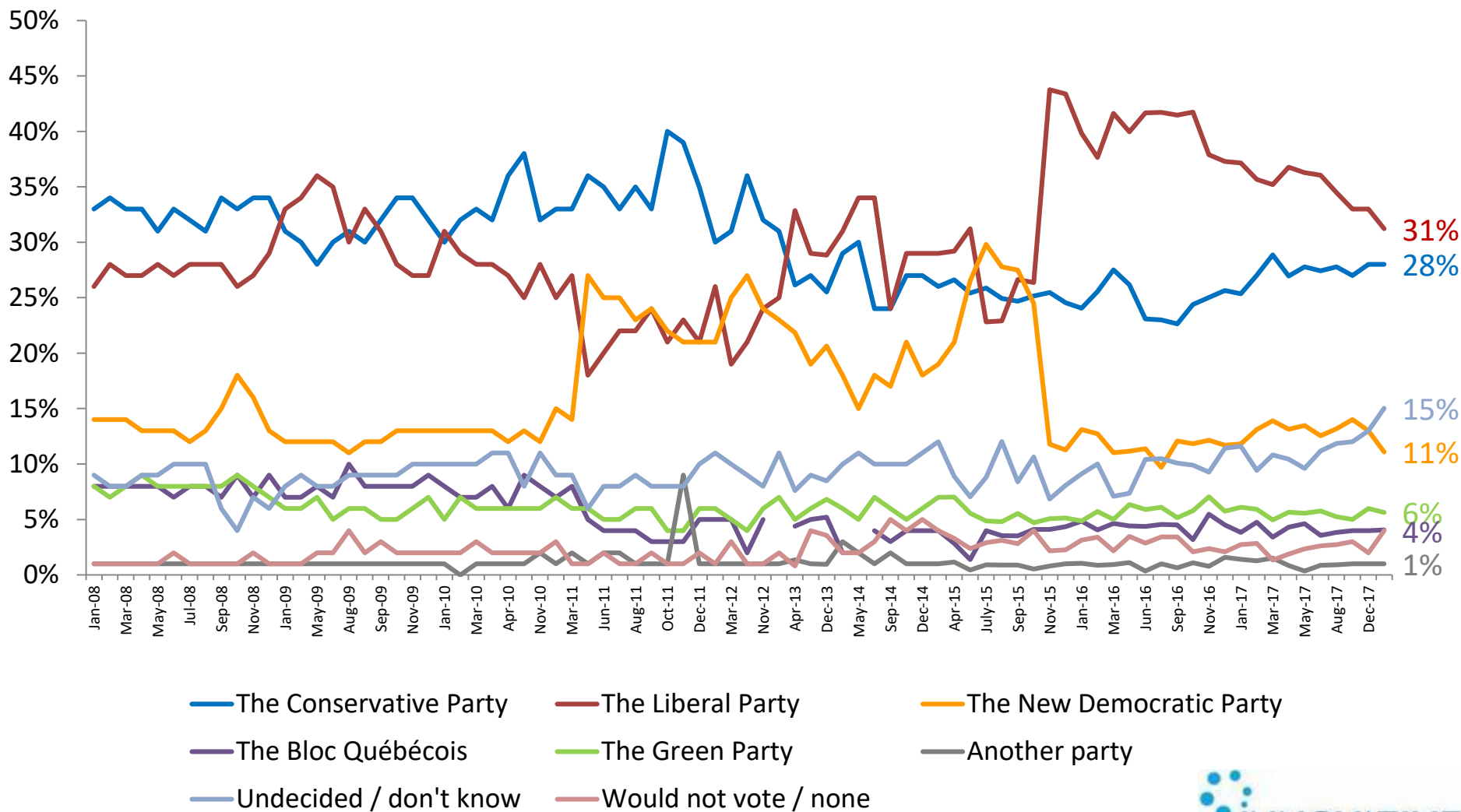


# Federal Vote

# Combined Federal Vote: Gap between Liberals and PC continues to narrow; undecided now higher than NDP

Q

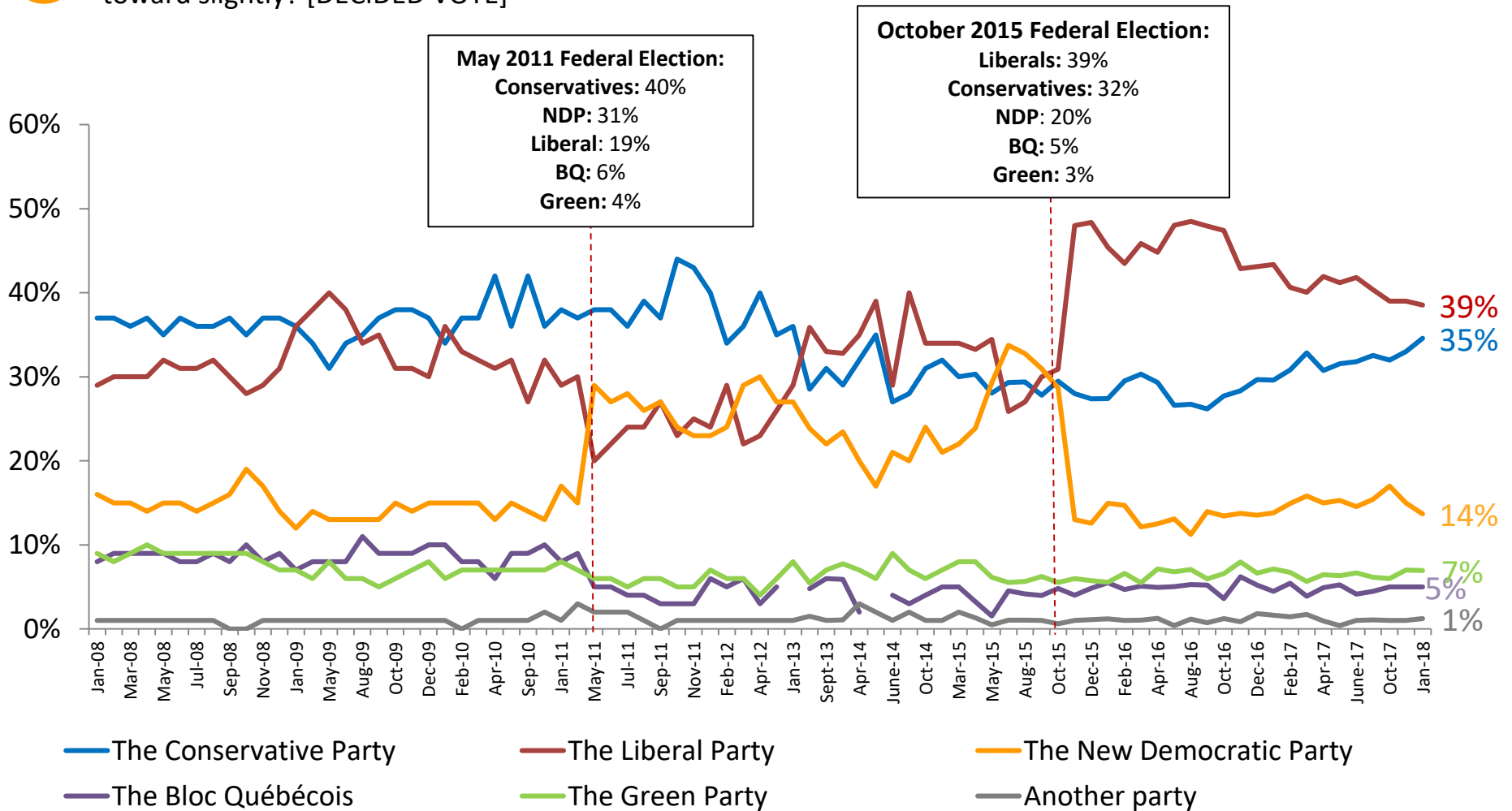
If a federal election were held today, which party would you vote for? In that case, which party do you lean toward slightly? [VOTE + LEAN]



# Decided Federal Vote: Liberal vote returns to 2015 election;<sup>7</sup> PCs continue to gain, while NDP drops below election results

Q

If a federal election were held today, which party would you vote for? In that case, which party do you lean toward slightly? [DECIDED VOTE]



# Value Indices

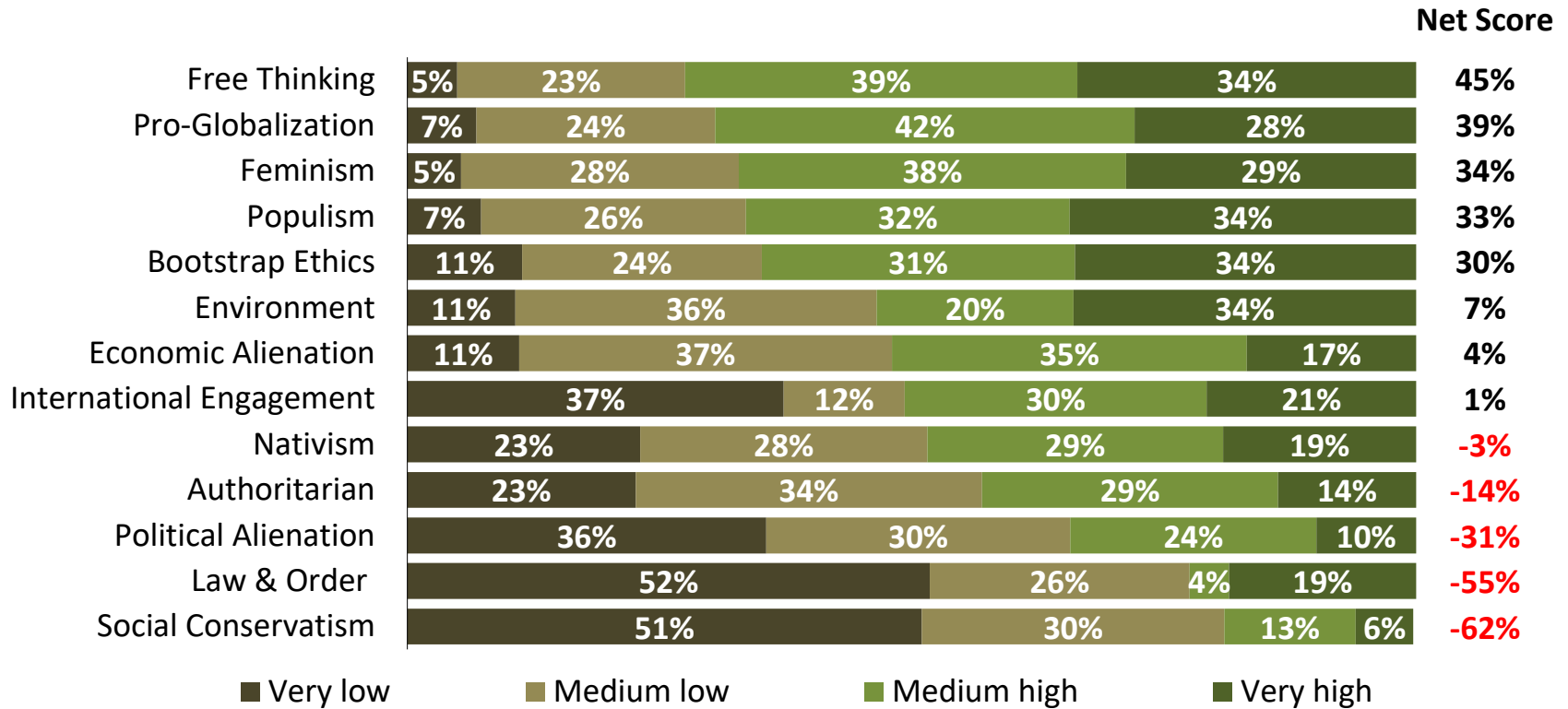


# Value Indices Methodology

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- Exploring respondents' reactions to the 59 value statements in this survey found many statements were connected by underlying value dimensions.
- The initial analysis found 13 underlying value dimensions: Free Thinkers, Authoritarianism, Economic Alienation, Environment, Feminism, Pro-Globalization, Law & Order, Nativism, International engagement, Social Conservatism, Bootstrap Ethics, Populism (government skeptic), and Political Alienation (government skeptic). An additional 16 values were found to be standalone, not adding to any of the above dimensions. (Note: not all standalones are included in the current analysis.)
- An index was created for each of those 13 dimensions. Questions were scaled in an index from 0 to 1, with 1 being the highest value across all questions, and zero representing the lowest value across all questions. "Don't know" and "Neither/Neutral" options were scored as 0.5.

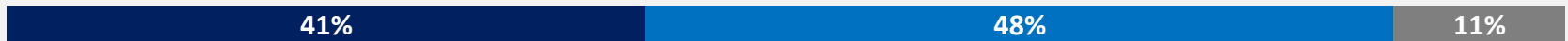
# Values Indices and Standalone: Canadians embrace a mix of values creating opportunities for different political parties<sup>10</sup>



## Standalone Values



When governments make major decisions concerning spending on programs and services, do you think they should be based on ...?



Their ability to afford the programs and services
  The public's need for the programs and services
  Don't know

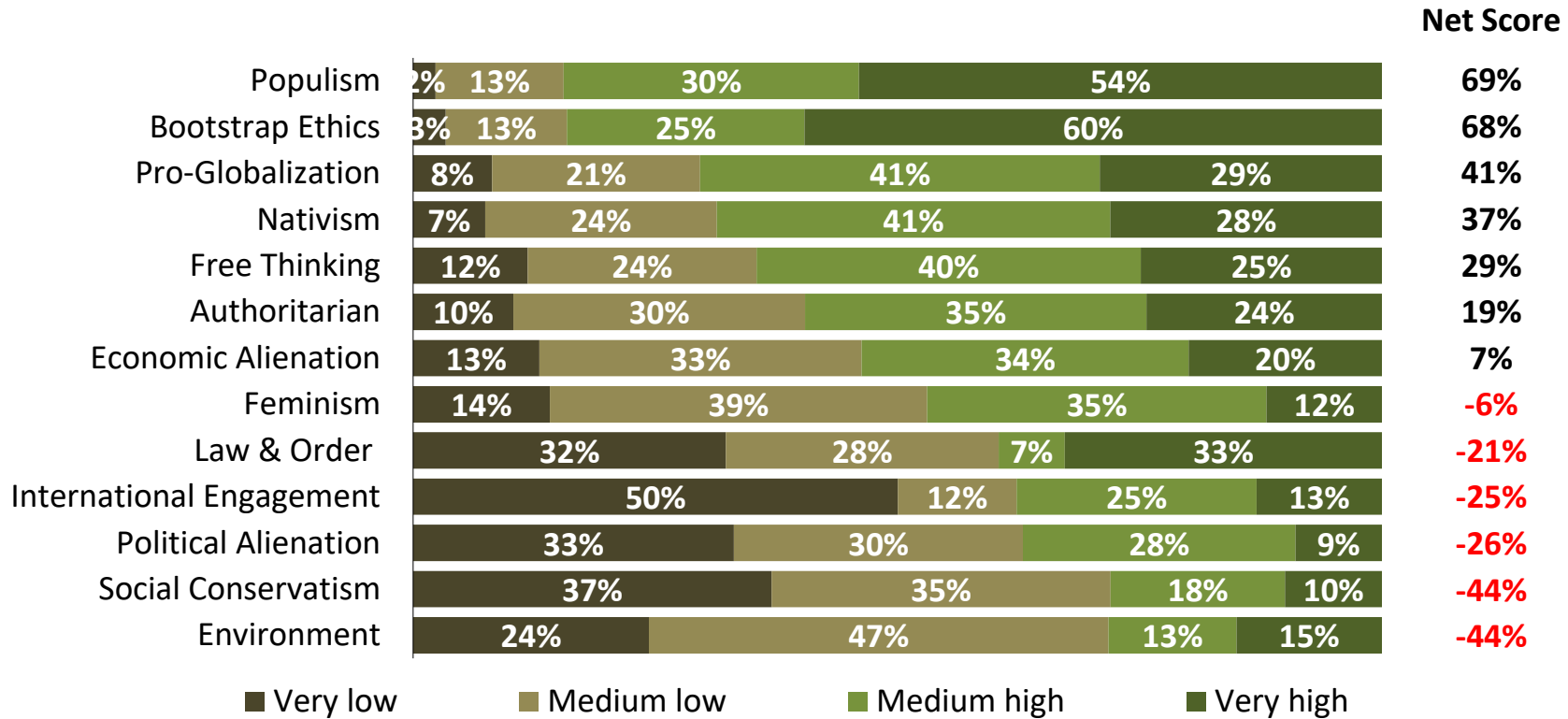


Thinking about the role of the federal government when it comes to the economy, which statement is closest to your point of view?

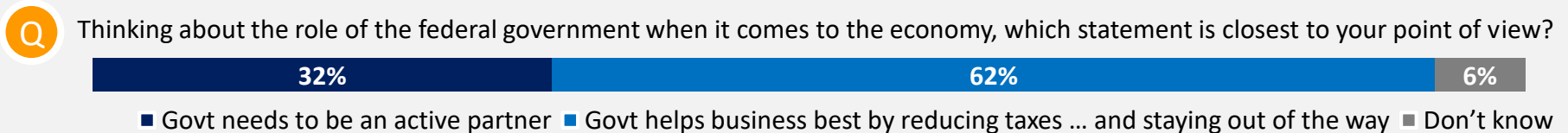
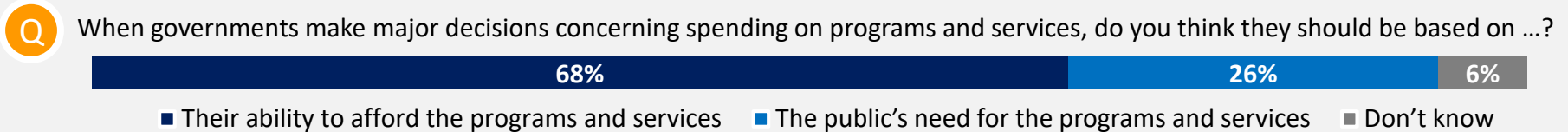


Govt needs to be an active partner
  Govt helps business best by reducing taxes ... and staying out of the way
  Don't know

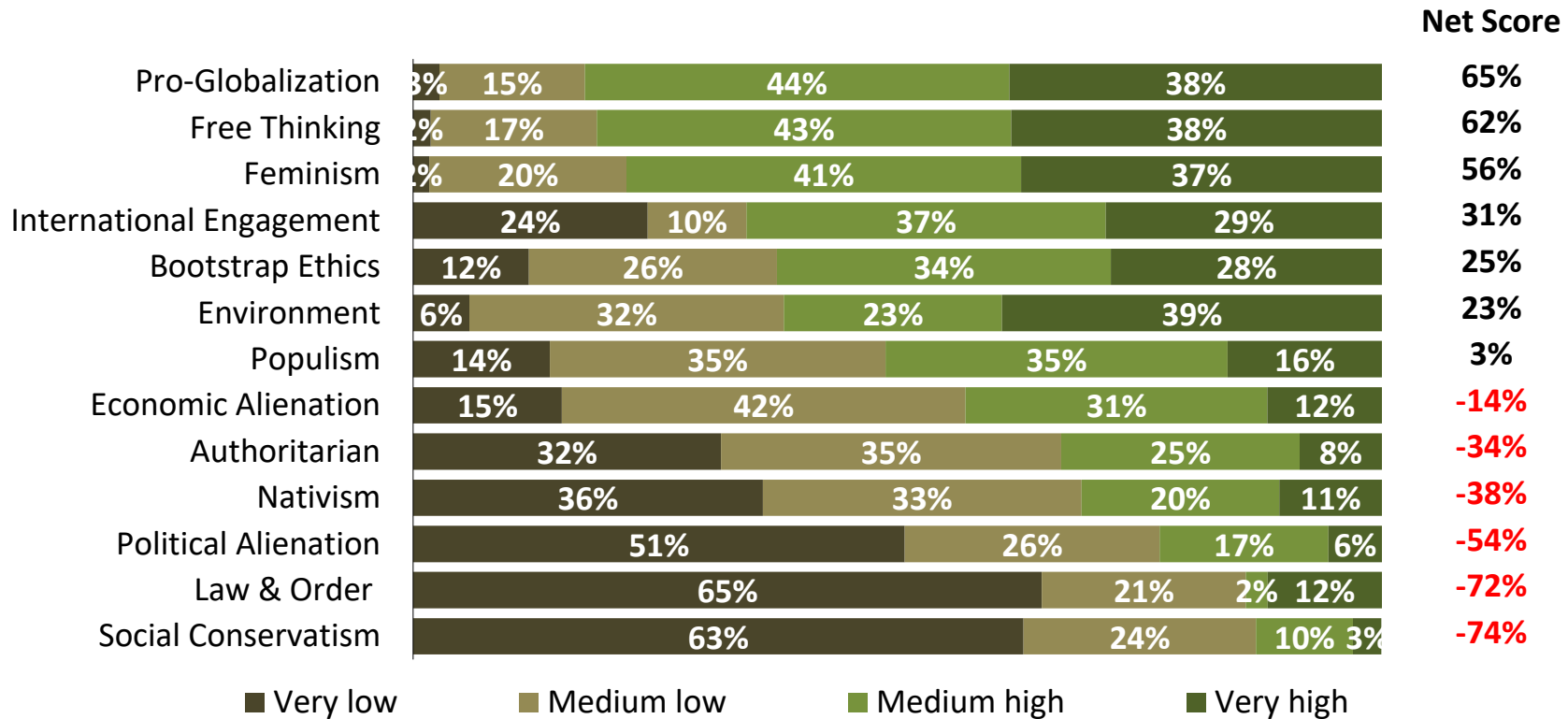
# Values Indices and Standalone (CPC Voters): Populism and bootstrap ethics top; higher than avg on law/order, social con. <sup>11</sup>



## Standalone Values



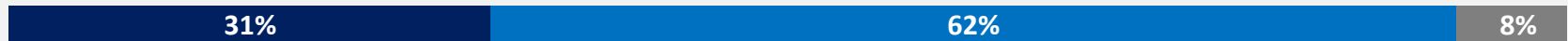
# Values Indices and Standalone (LPC Voters): Globalism, socially liberal values top for LPC voters



## Standalone Values



When governments make major decisions concerning spending on programs and services, do you think they should be based on ...?



■ Their ability to afford the programs and services    ■ The public's need for the programs and services    ■ Don't know

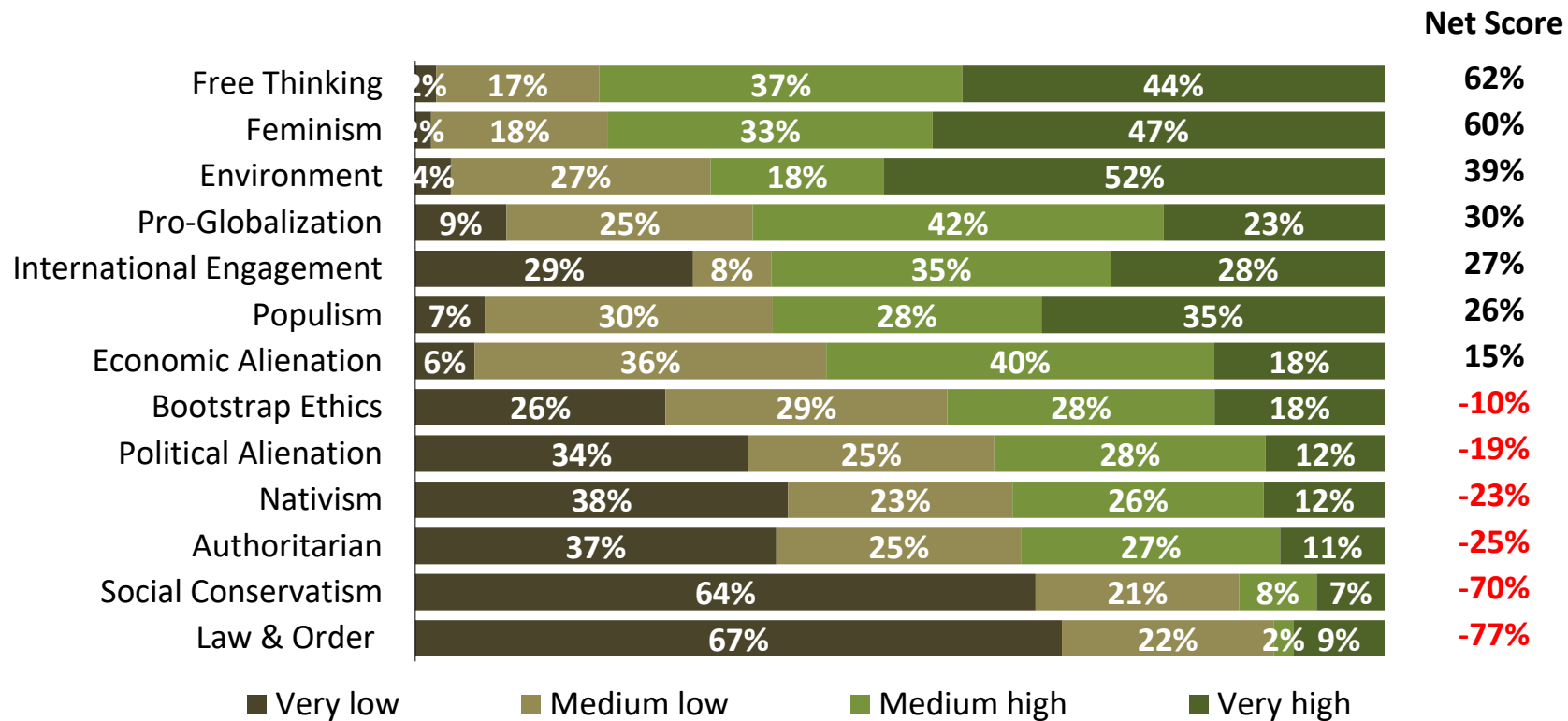


Thinking about the role of the federal government when it comes to the economy, which statement is closest to your point of view?

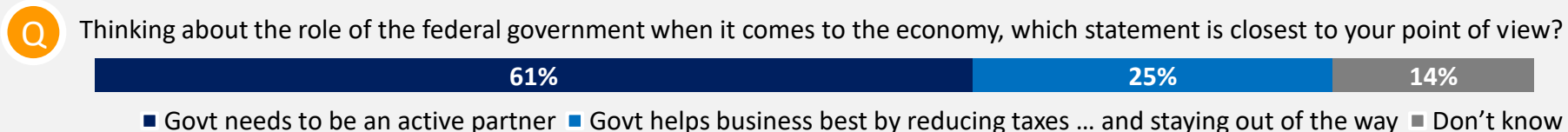
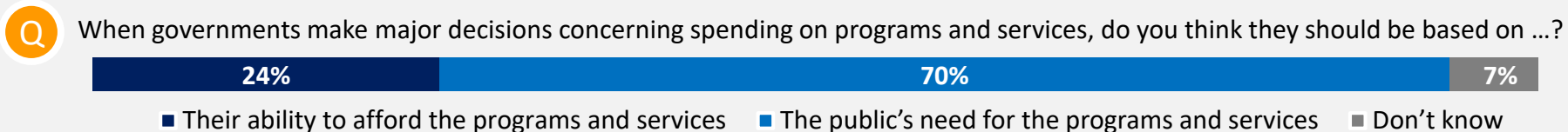


■ Govt needs to be an active partner    ■ Govt helps business best by reducing taxes ... and staying out of the way    ■ Don't know

# Values Indices and Standalone (NDP Voters): Environment a top 3-value, globalism and bootstrap values lowest of 3 parties <sup>13</sup>



## Standalone Values



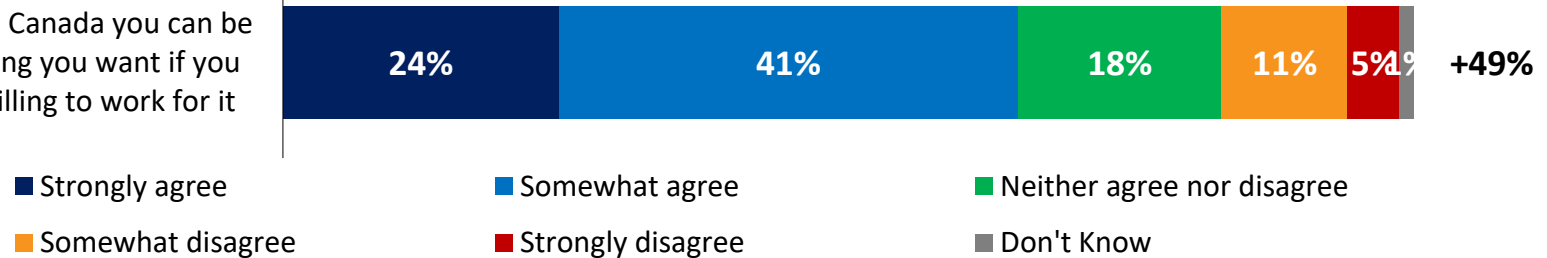
# CPC Universe by Economic Value Indices

# Bootstrap Ethics Index

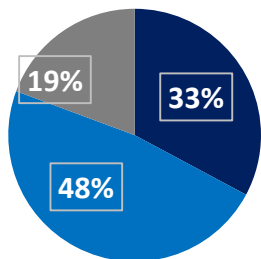
Q Do you agree or disagree with the following statement?

Here in Canada you can be anything you want if you are willing to work for it

**Net Agree**

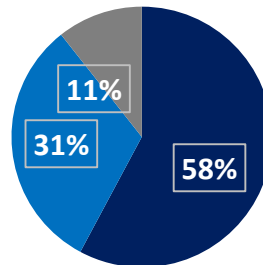


Q Which of the following statements best describes your personal point of view?  
The profit system ...



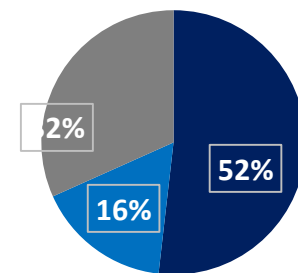
- ... brings out the worst in human nature
- ... teaches people the value of hard work and success
- Don't know

Q Is the main role of government ...?

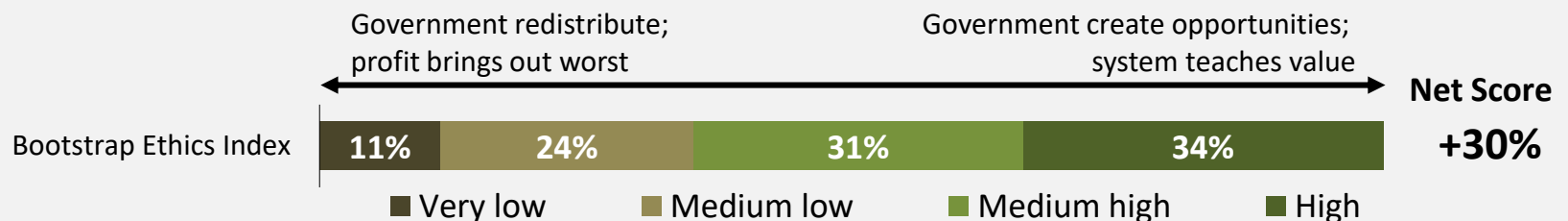


- To create equal opportunity so that everyone can compete on their own to be the best they can be
- To redistribute wealth so that the poor and disadvantaged have more than they would if left on their own
- Don't know

Q Generally, do you think people who don't get ahead in life should blame ...?



- Themselves
- The system
- Don't know



# CPC Universe by Bootstrap Ethics Index

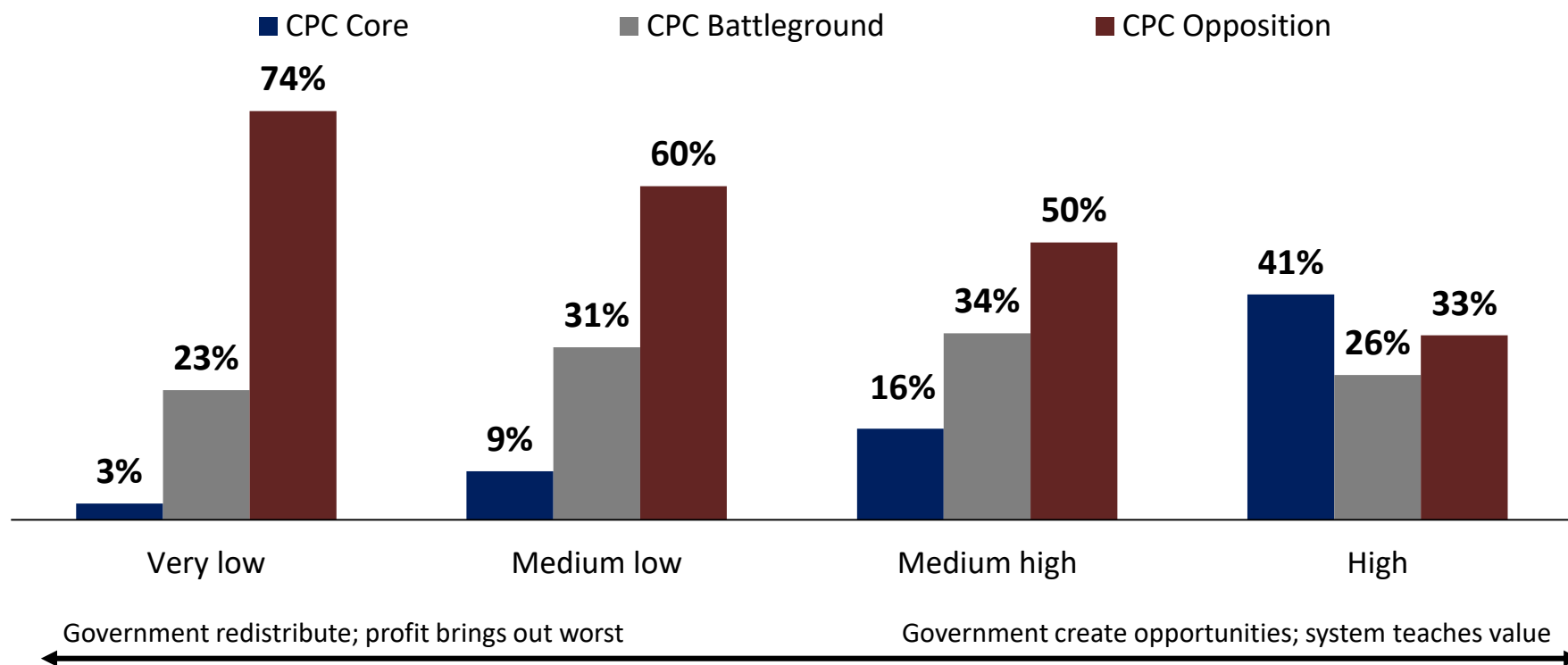
Q

If a federal election were held today, which party would you vote for? In that case, which party do you lean toward slightly? [VOTE + LEAN]

BY

Bootstrap Ethics Index (4 questions):

- Profit system encourages hard work/success NOT brings out the worst
- Main role of government to create opportunity NOT redistribution
- Don't get ahead should blame themselves self NOT system
- Agree: Here in Canada you can be anything you want if you are willing to work for it

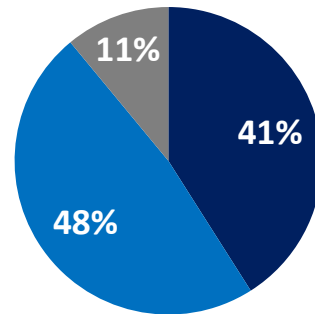




# Combined Vote by Fiscal Standalone Value



When governments make major decisions concerning spending on programs and services, do you think they should be based on ...?

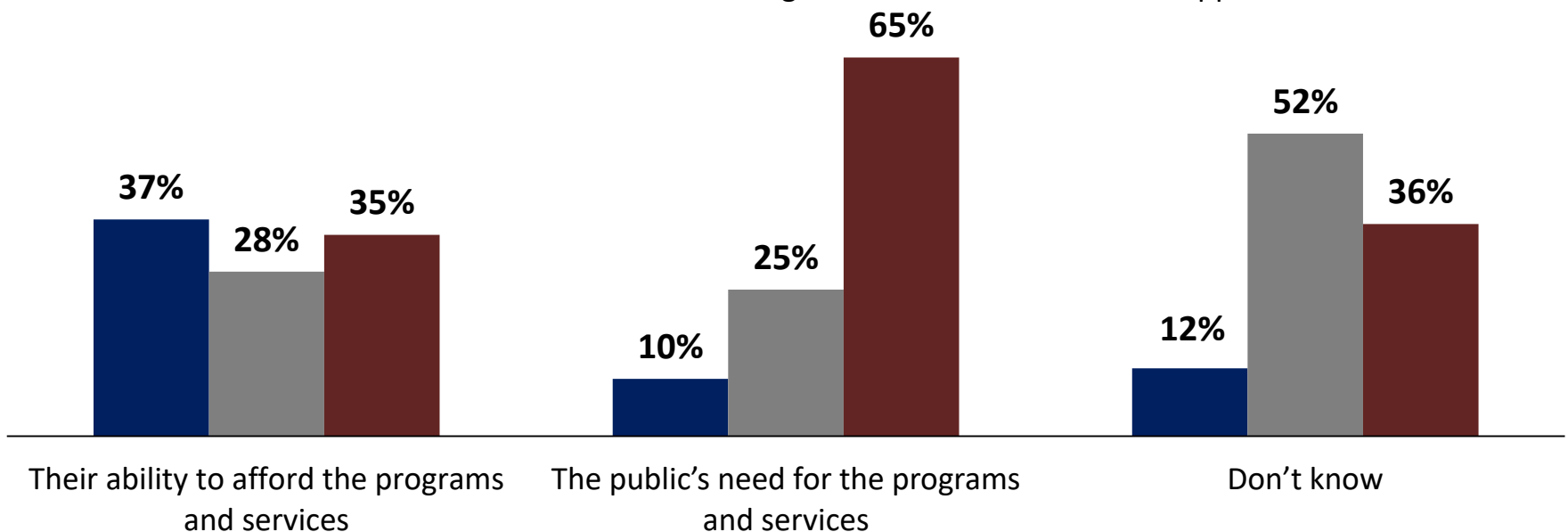


- Their ability to afford the programs and services
- The public's need for the programs and services
- Don't know

■ CPC Core

■ CPC Battleground

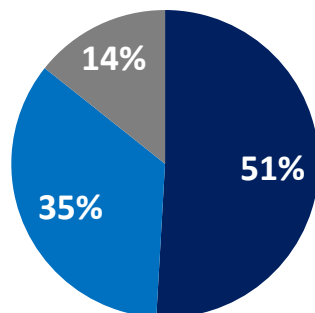
■ CPC Opposition



# Combined Vote by Economic Activism Standalone Value

Q

Thinking about the role of the federal government when it comes to the economy, which statement is closest to your point of view?

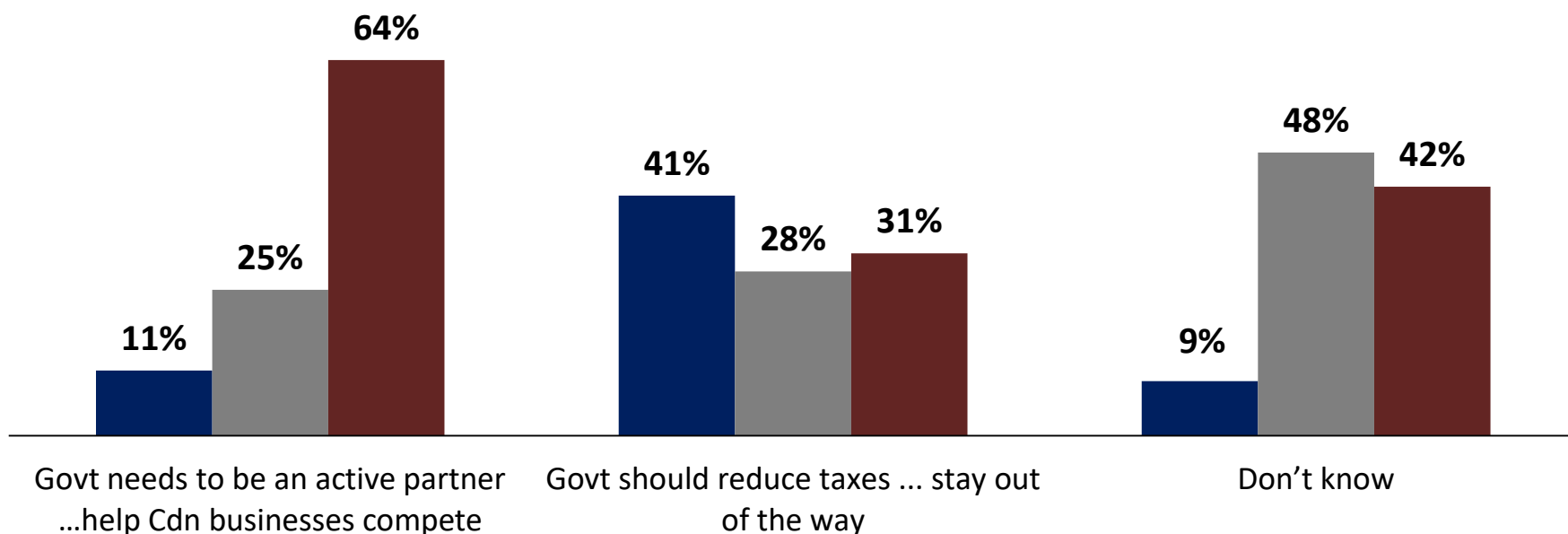


- Government needs to be an active partner to help Canadian businesses compete in the world with incentives to encourage research and development, training programs and other initiatives to support high potential industries
- Government helps business the best by reducing taxes and red tape and staying out of the way, not by trying to pick winners with taxpayers' money
- Don't know

■ CPC Core

■ CPC Battleground

■ CPC Opposition

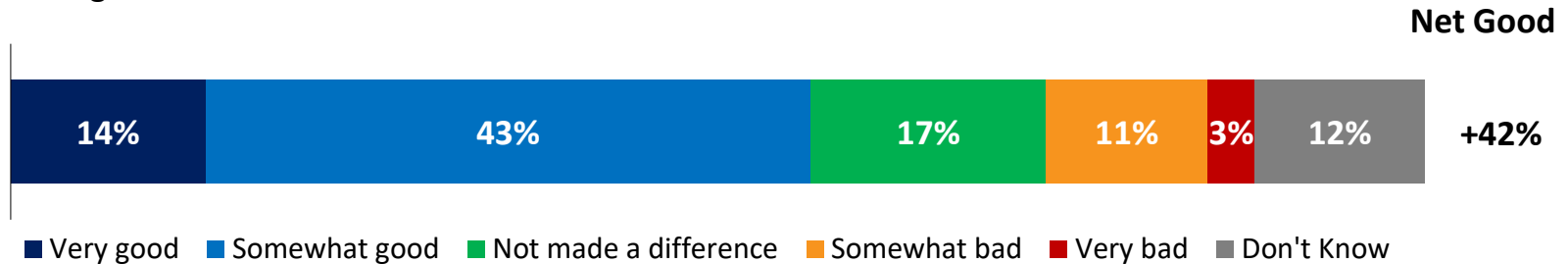


# CPC Universe by International Value Indices

# Pro-Globalization Index

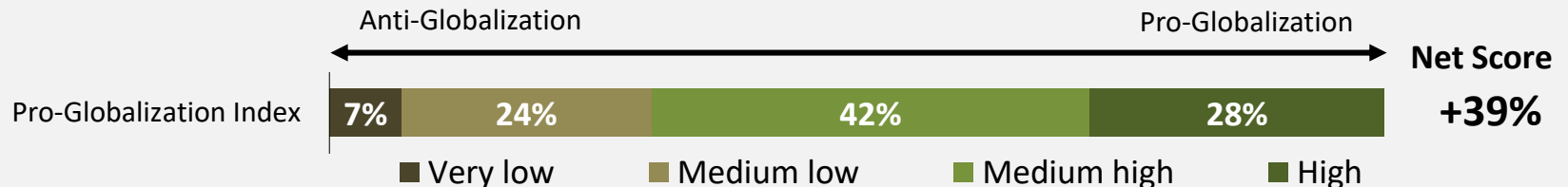
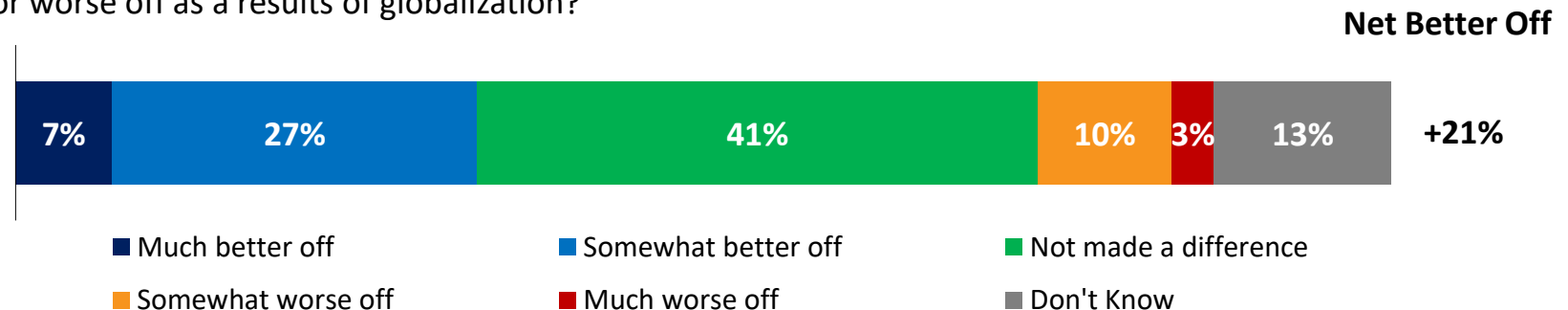
Q

Thinking about globalization, the way in which the economies of different countries have become more closely connected, do you feel globalization has generally been a good thing for Canada or a bad thing for Canada?



Q

And what do you think the impact of globalization has been on you? Do you feel you are better off or worse off as a results of globalization?



# CPC Universe by Pro-Globalization Index

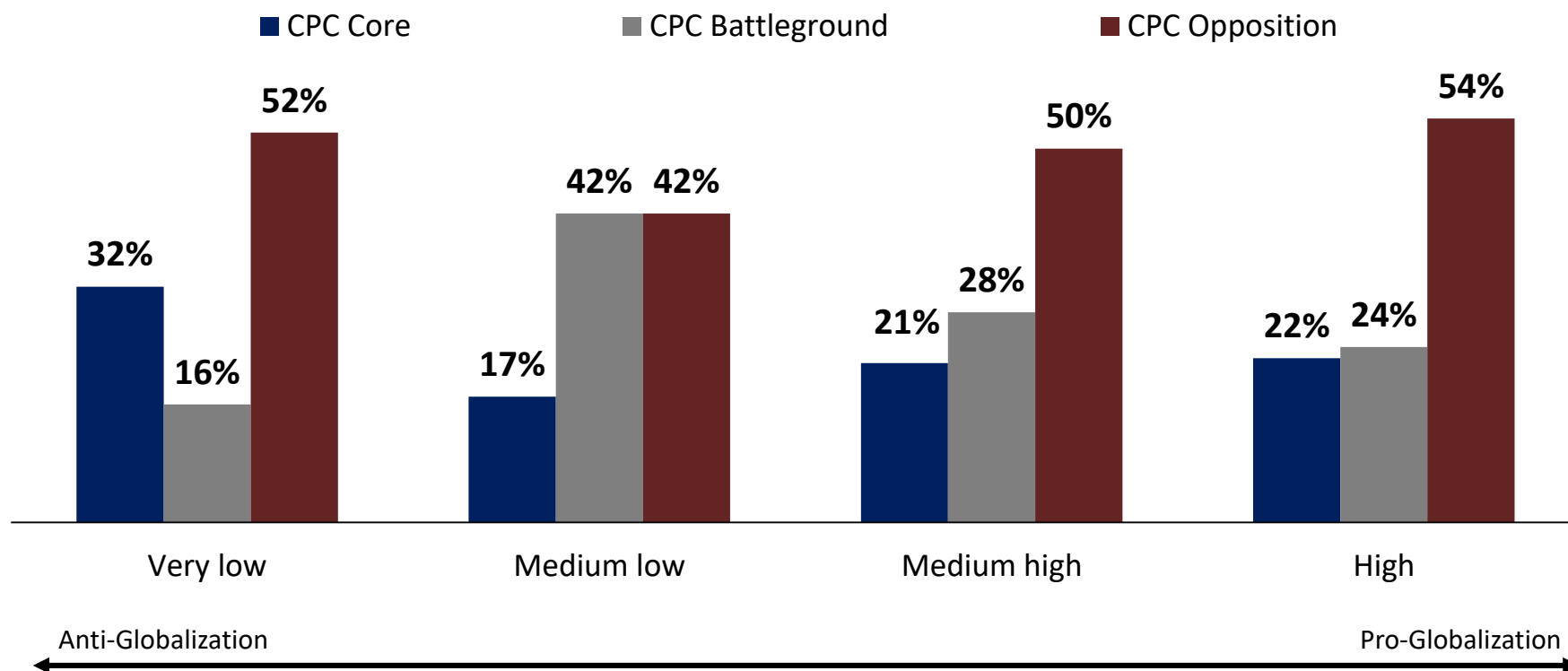
Q

If a federal election were held today, which party would you vote for? In that case, which party do you lean toward slightly? [VOTE + LEAN]

BY

Pro-Globalization Index (2 questions):

- Globalization has been a good thing for Canada
- Personal impact of globalization- feel better off as a result



# International Engagement Index

Q

Do you think it would be better for the future of the country if we take an active part in world affairs or if we stay out of world affairs?



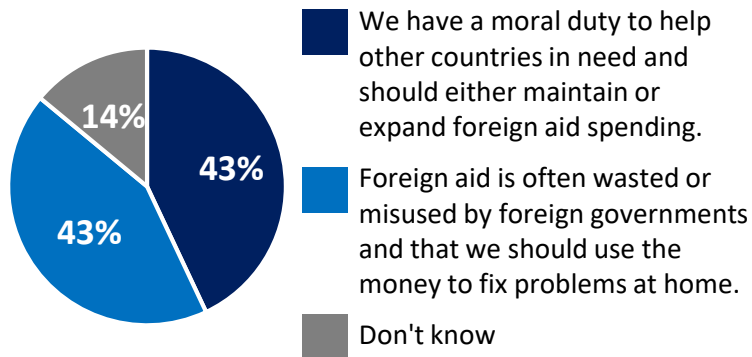
**Net Agree  
+58%**

- Strongly agree we should take an active part
- Somewhat agree we should stay out
- Don't Know

- Somewhat agree we should take an active part
- Strongly agree we should stay out

Q

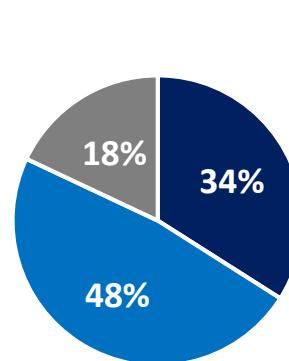
Which of the following statements comes closest to your own point of view?



- We have a moral duty to help other countries in need and should either maintain or expand foreign aid spending.
- Foreign aid is often wasted or misused by foreign governments and that we should use the money to fix problems at home.
- Don't know

Q

Whenever Canada sends our military into dangerous circumstances around the world, there is always a chance some members of our military may be killed. Which of the following statements about the military is closest to your view?

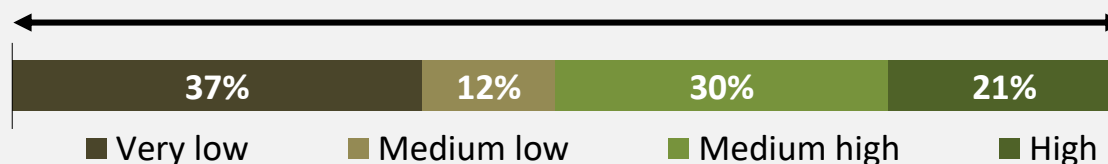


- Canada should send troops to help when people in Asia and Africa are threatened by systematic human rights violations or countries collapse, even if no Canadian civilians are at risk and Canada has no direct interest at stake.
- Canada should do what we can to help people in Asia and Africa when countries collapsed or there are serious human rights violations, we should not put the lives of members of the Canadian military at risk unless there is a real threat to Canadian civilians or our national interest.
- Don't know

Not active in world affairs

Active in world affairs

International Engagement Index



**Net Score  
+2%**

# CPC Universe by International Engagement Index

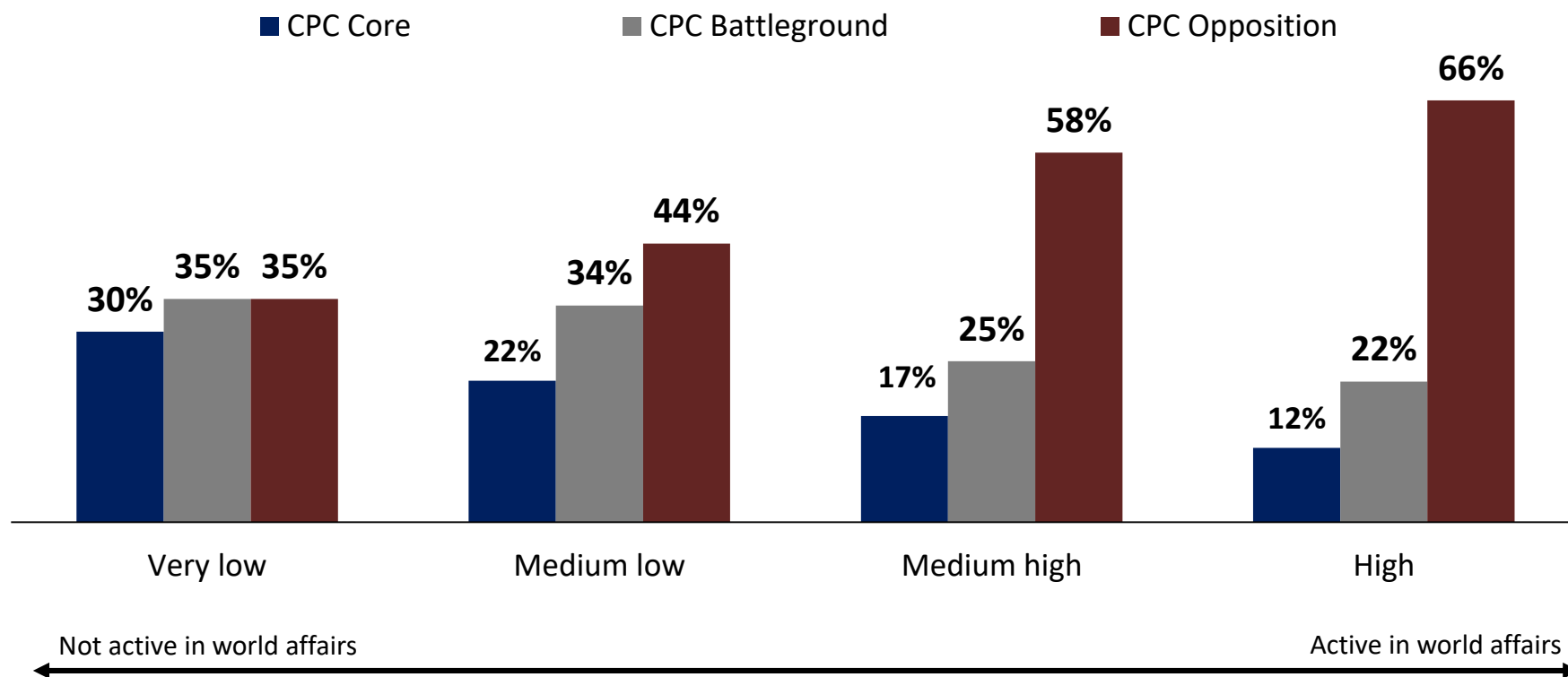
Q

If a federal election were held today, which party would you vote for? In that case, which party do you lean toward slightly? [VOTE + LEAN]

BY

International Engagement Index (3 questions):

- We have a moral duty to help countries in need, should maintain or expand foreign aid spending
- Send Canadian troops to Asia and Africa to prevent human rights violations or countries collapse, even if no direct interest
- Agree: Take active part in world affairs



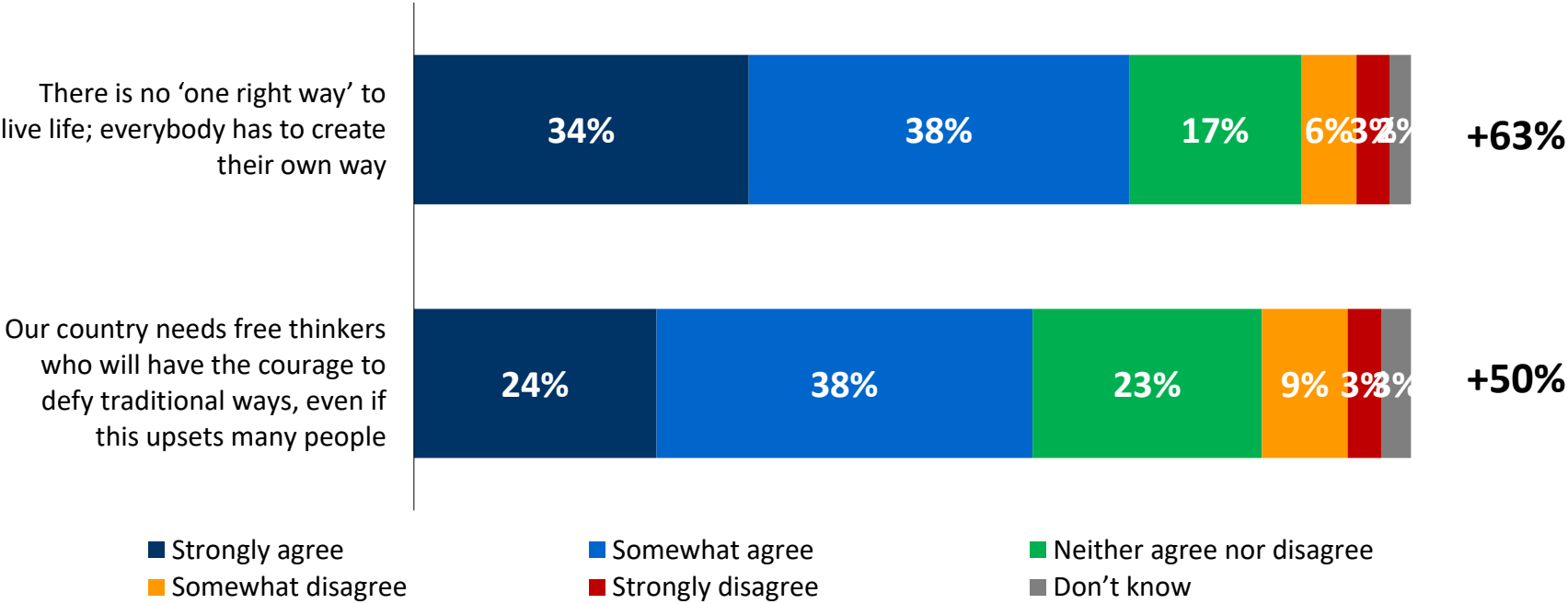
# CPC Universe by Progressive Value Indices



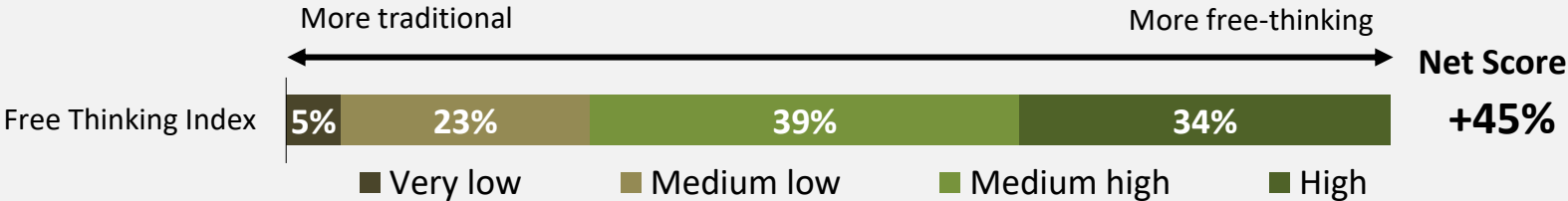
# Free Thinking Index

**Q** Do you agree or disagree with the following statements?

**Net Agree**



■ Strongly agree
■ Somewhat agree
■ Neither agree nor disagree
■ Somewhat disagree
■ Strongly disagree
■ Don't know



# CPC Universe by Free Thinking Index

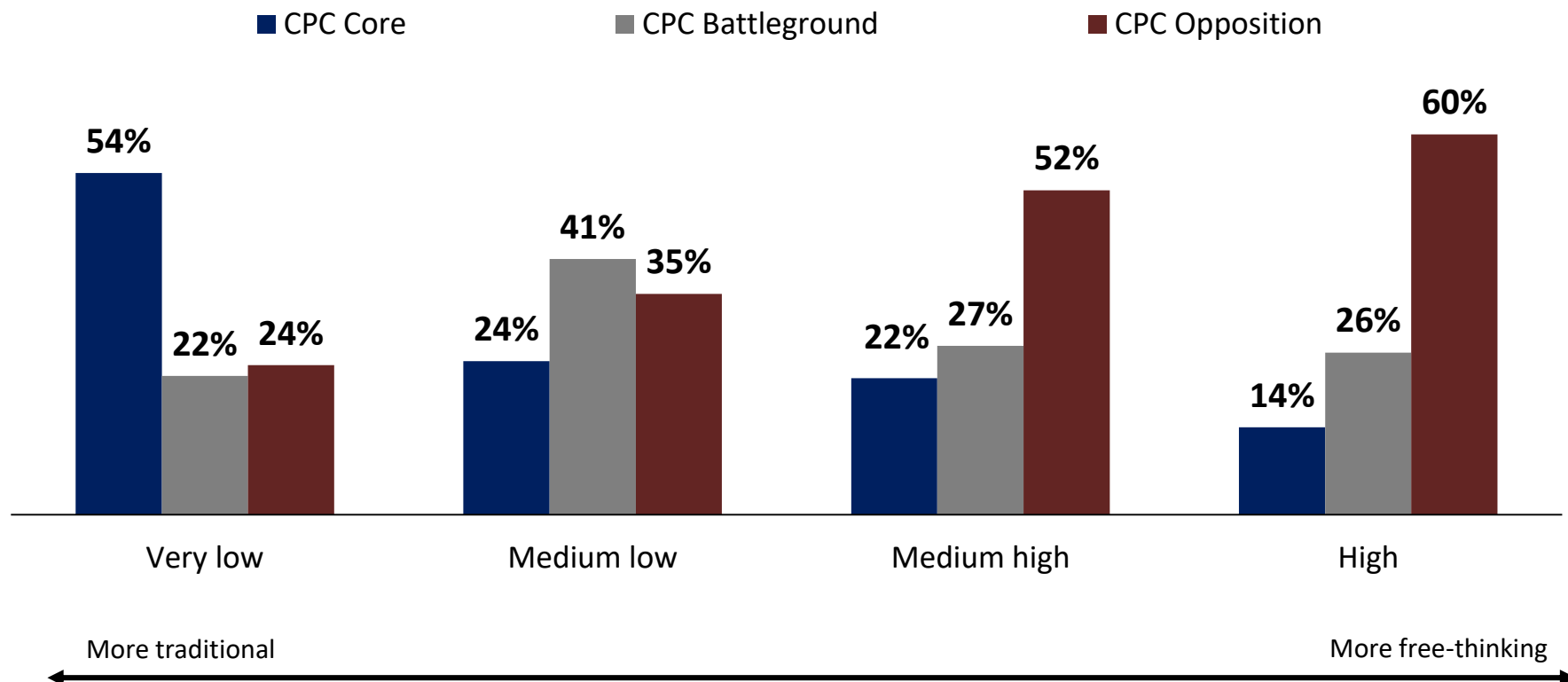
Q

If a federal election were held today, which party would you vote for? In that case, which party do you lean toward slightly? [VOTE + LEAN]

BY

Free Thinking Index (2 questions):

- Agree: No one right way to live, everybody has to create their own way
- Agree: Our country needs free thinkers to defy traditions, even if it upsets many people

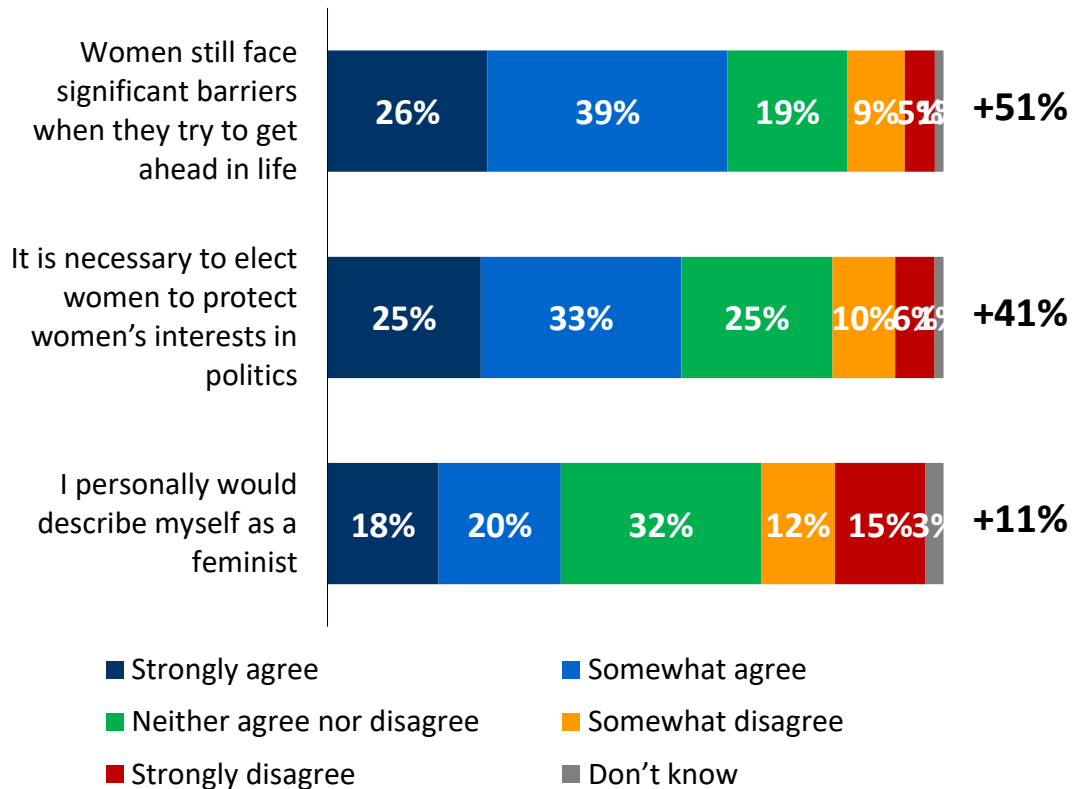


# Feminism Index

Q

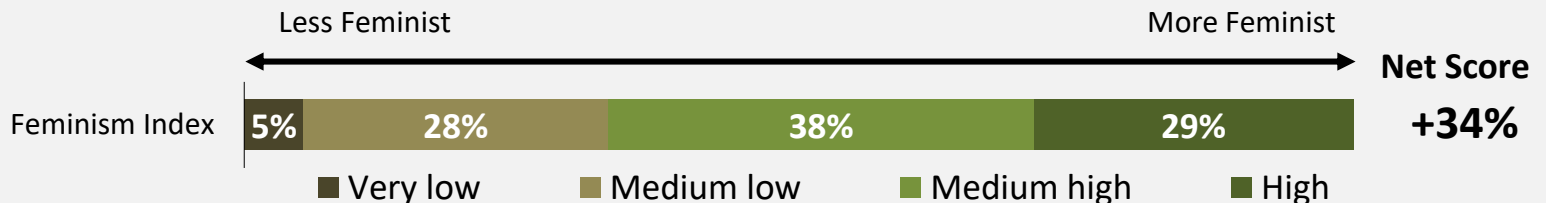
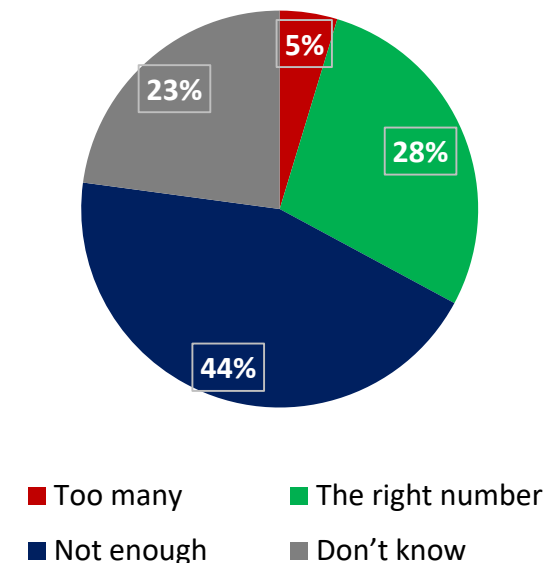
Do you agree or disagree with the following statements?

**Net Agree**



Q

When it comes to the number of women in elected office in Canada, do you think there are too many, not enough, or the right amount?



# CPC Universe by Feminism Index

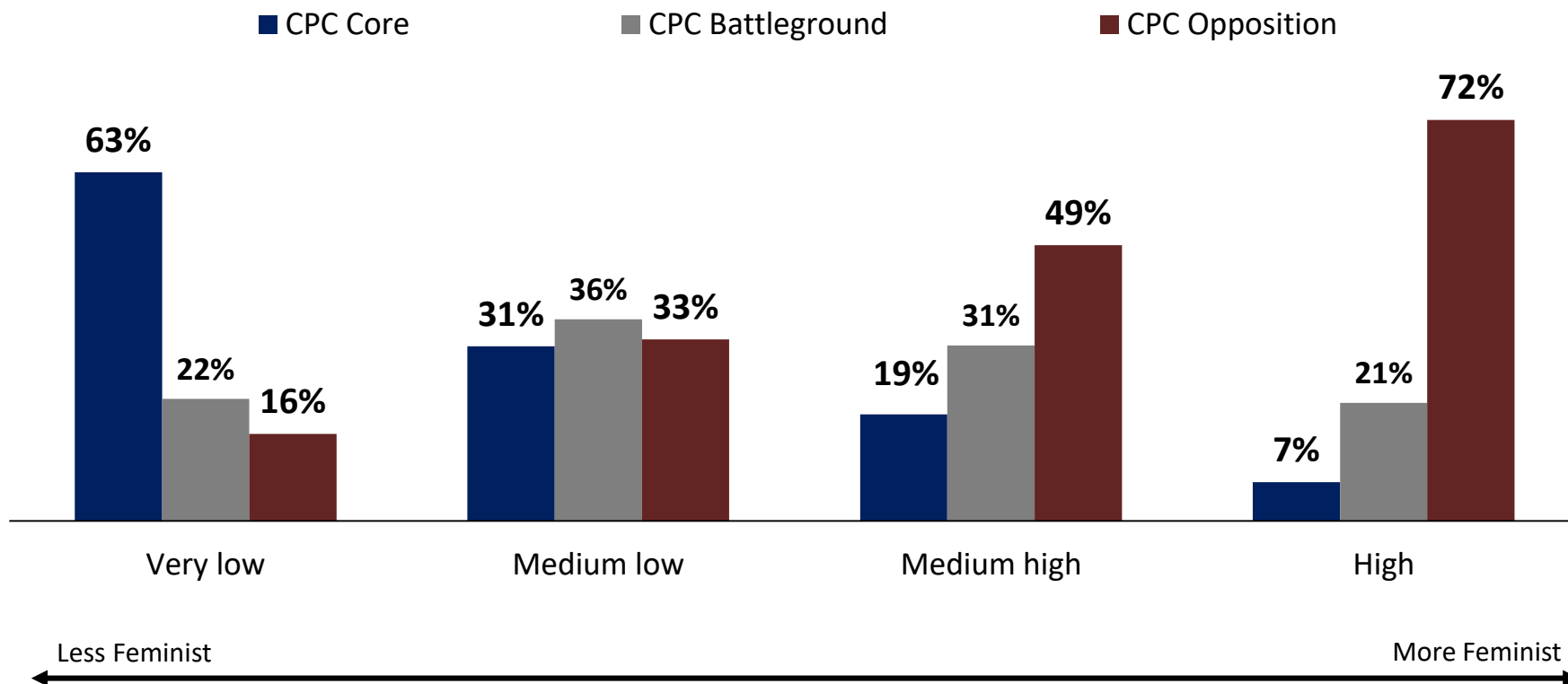
Q

If a federal election were held today, which party would you vote for? In that case, which party do you lean toward slightly? [VOTE + LEAN]

BY

Feminism Index (4 questions):

- Agree: It is necessary to elect women to protect women's interests in politics
- Agree: Women still face significant barriers when they try to get ahead in life
- Agree: I personally would describe myself as a feminist
- Number of women in elected office not enough (1) vs. too much (0)



# CPC Universe by Alientation Value Indices

# Populism Index

**Q** Do you agree or disagree with the following statement?

Governments care more about special interests than they do about the average person.

**Net Agree**

**+55%**

■ Strongly agree

■ Somewhat disagree

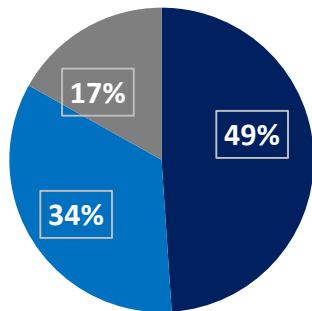
■ Somewhat agree

■ Strongly disagree

■ Neither agree nor disagree

■ Don't Know

**Q** When it comes to government decision making, which of the following statements is closest to your view?

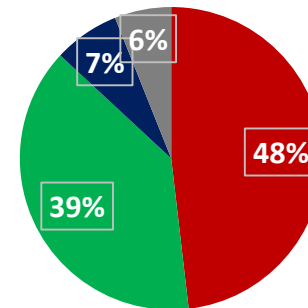


■ Too often the government listens to experts instead of common sense

■ Political issues are complicated so government should listen to experts when it comes to policy

■ Don't know

**Q** Do you think the people in government waste a lot of the money we pay in taxes, waste some of it, or don't waste very much of it?

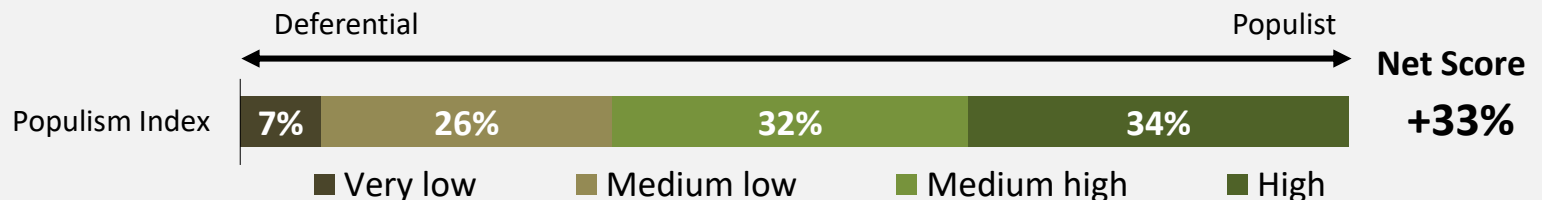


■ Waste a lot of the money

■ Waste some of it

■ Don't waste very much of it

■ Don't know



# CPC Universe by Populism Index

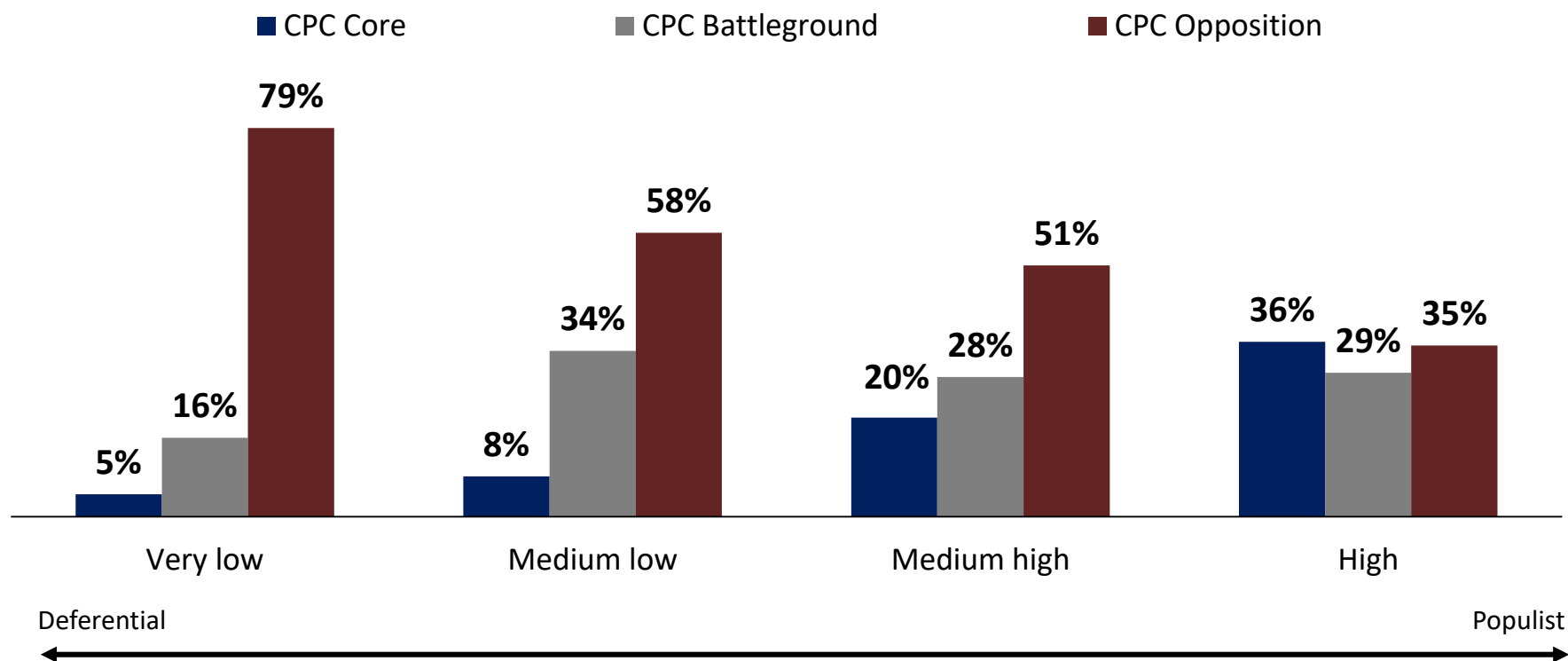
Q

If a federal election were held today, which party would you vote for? In that case, which party do you lean toward slightly? **[VOTE + LEAN]**

BY

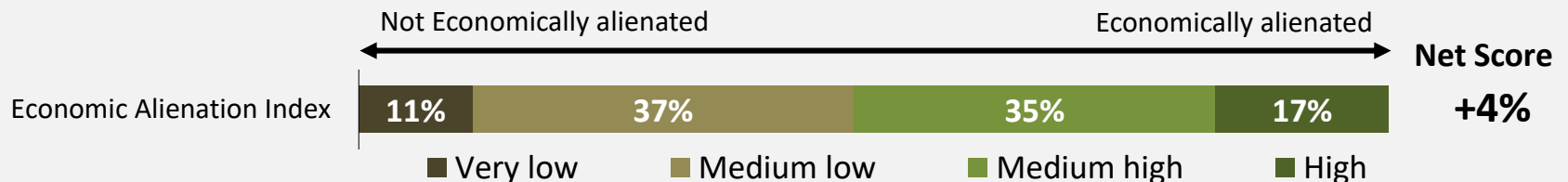
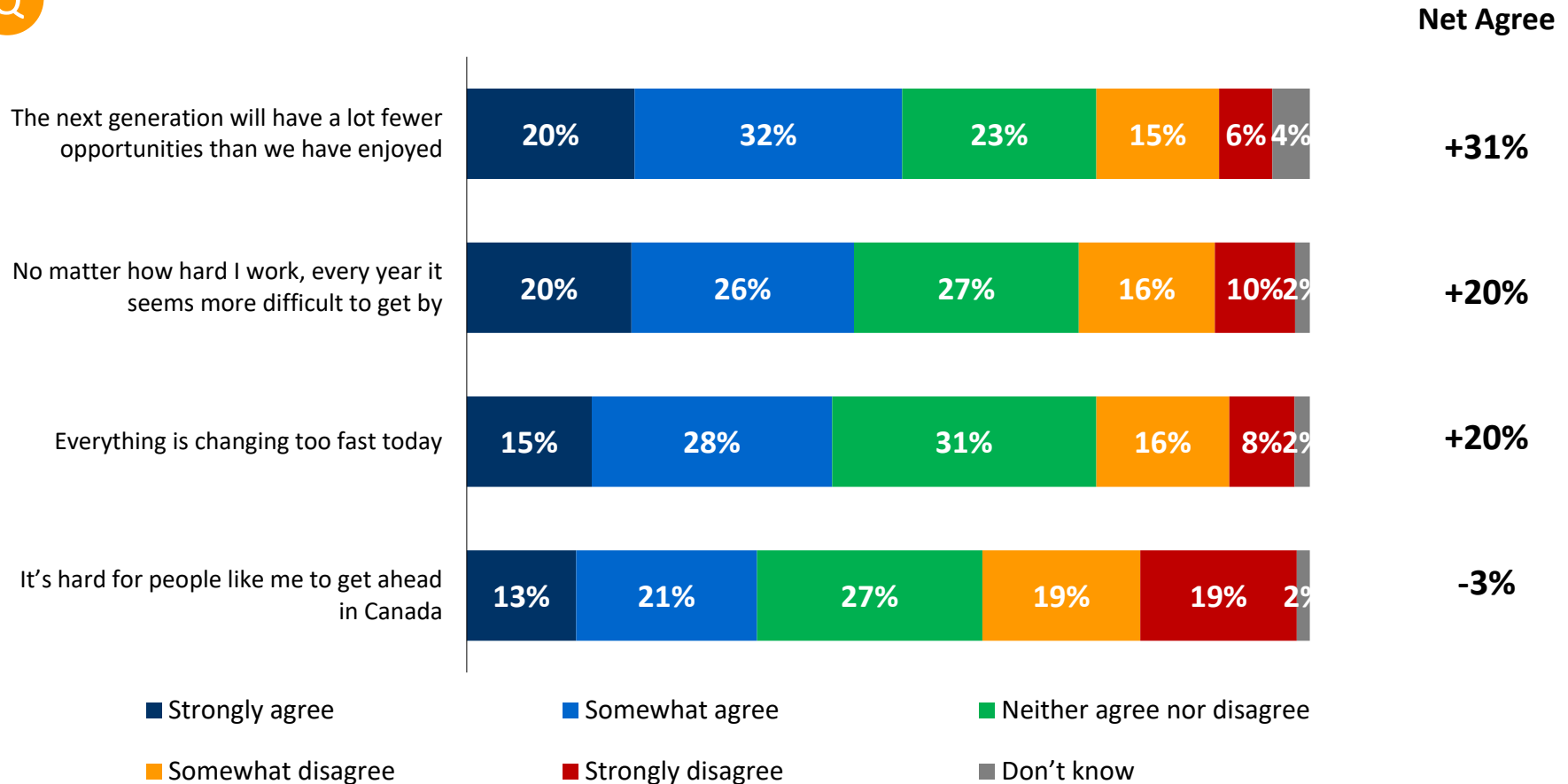
Populism Index (3 questions):

- Agree: Governments care more about special interests than they do about the average person
- Govt listens to experts too often instead of common sense (NOT listen to experts)
- People in government waste money we pay in taxes



# Economic Alienation Index

Q Do you agree or disagree with the following statements?





# CPC Universe by Economic Alienation Index

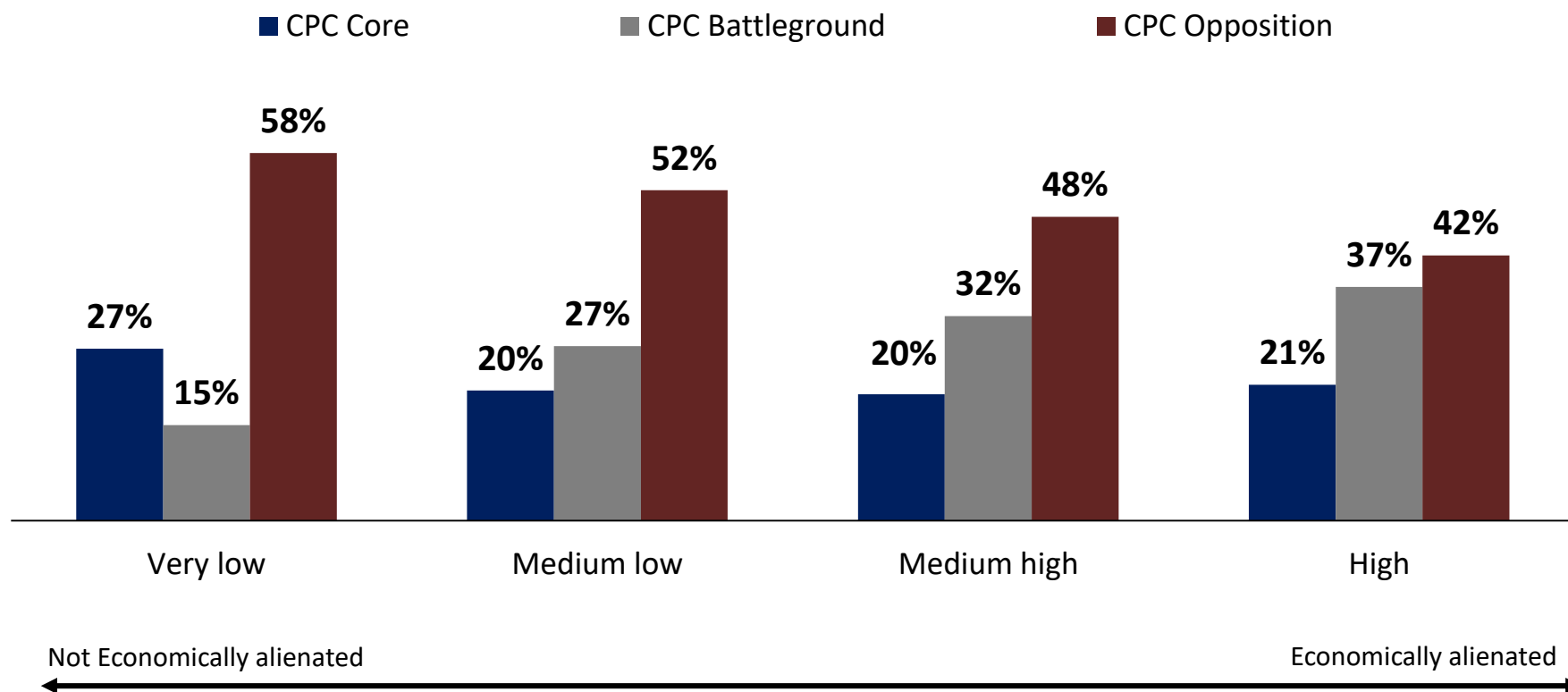
Q

If a federal election were held today, which party would you vote for? In that case, which party do you lean toward slightly? [VOTE + LEAN]

BY

Economic Alienation Index (4 questions):

- Agree: Hard for people like me to get ahead in Canada
- Agree: No matter how hard I work, every year it seems more difficult to get by
- Agree: Next generation will have fewer opportunities than the ones we enjoyed
- Agree: Everything changing too fast today



# Political Alienation Index

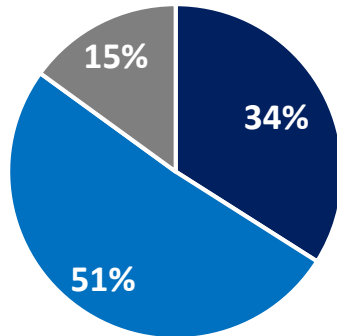
**Q** Do you agree or disagree with the following statements?

Sometimes politics seems so complicated that a person like me can't really understand what's going on



■ Strongly agree ■ Somewhat agree ■ Neither agree nor disagree ■ Somewhat disagree ■ Strongly disagree ■ Don't know

**Q** Which of the following statements comes closest to your own point of view?

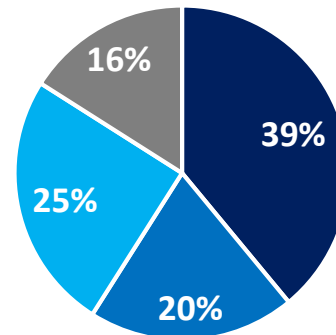


■ Most of the compromising that goes on in politics turns out to be bad for the public

■ Compromise and bargaining among politicians is necessary to make democracy work

■ Don't know

**Q** Which statement best represents your view of the political process in Canada?

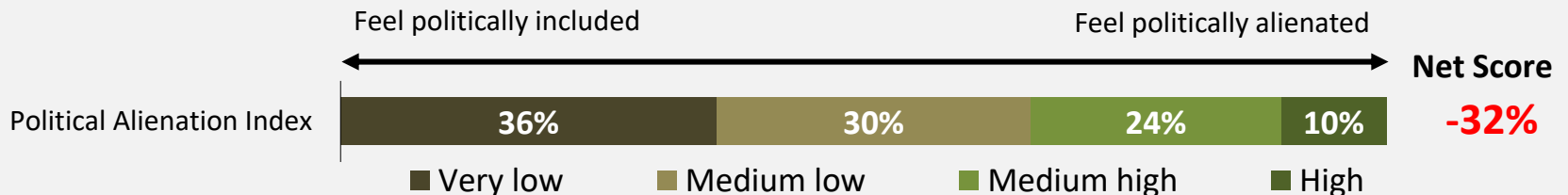


■ The best way to make a difference is to work within the existing political system

■ The best way to make a difference is to get involved with political or protest movements outside the traditional political system

■ It doesn't matter what you do, you can't really make a difference in politics

■ Don't know



# CPC Universe by Political Alienation Index

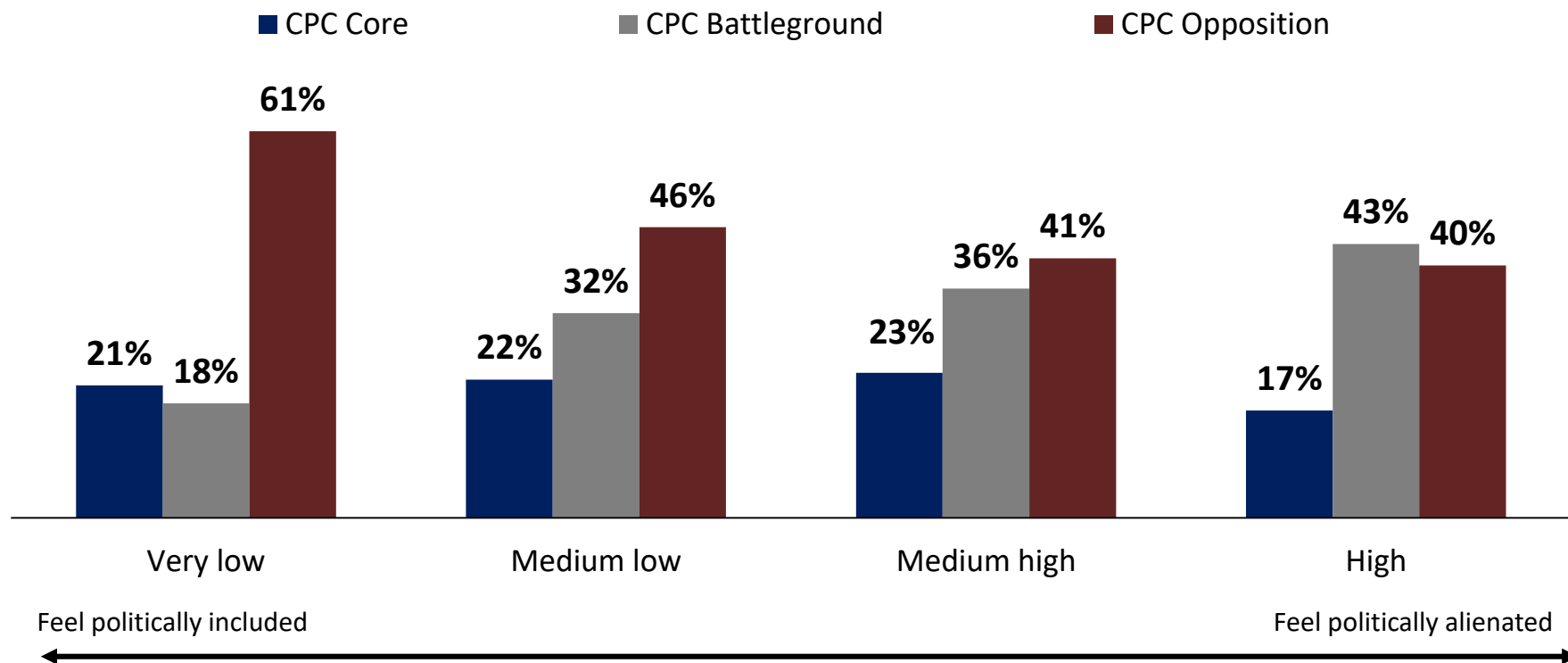
Q

If a federal election were held today, which party would you vote for? In that case, which party do you lean toward slightly? [VOTE + LEAN]

BY

Political alienation Index (3 questions):

- Compromising in politics bad for the public (NOT necessary to make democracy work)
- Best way to make a difference work with system (1)/get involved with protest (0.75) vs. can't make a difference(0)
- Agree: sometimes politics seems so complicated that a person like me can't really understand what's going on

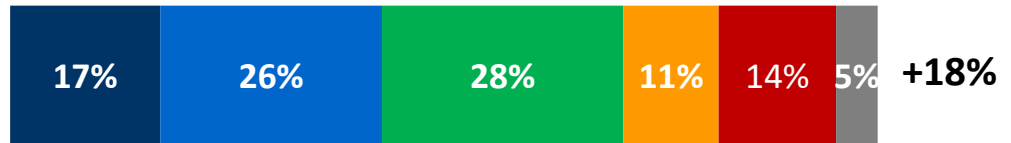


# Authoritarian Index

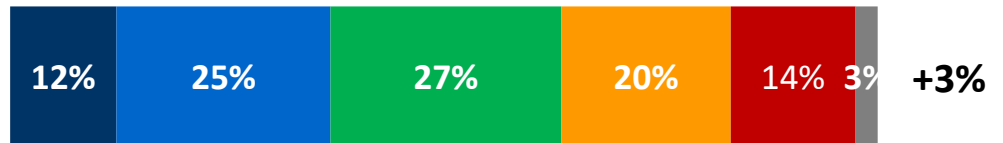
Q Do you agree or disagree with the following statements?

Net Agree

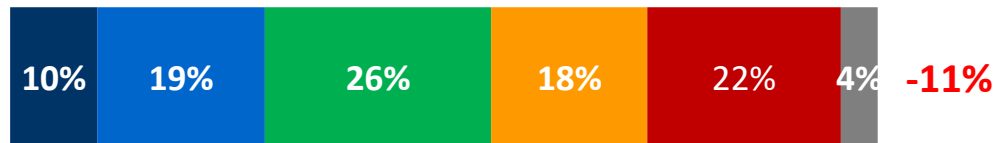
What this country needs is strong, determined leaders who will destroy the negative forces that have taken us from our true path and silence the trouble makers spreading bad ideas



The 'old-fashioned ways' and 'old-fashioned values' still show the best way to live."



Our country will be great if we honour the ways of our forefathers, do what the authorities tell us to do, and get rid of the 'rotten apples' who are ruining everything



■ Strongly agree

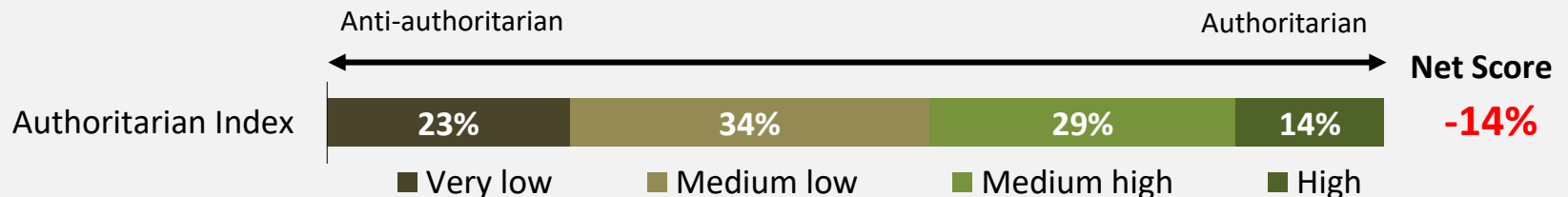
■ Somewhat agree

■ Neither agree nor disagree

■ Somewhat disagree

■ Strongly disagree

■ Don't know



# CPC Universe by Authoritarianism Index

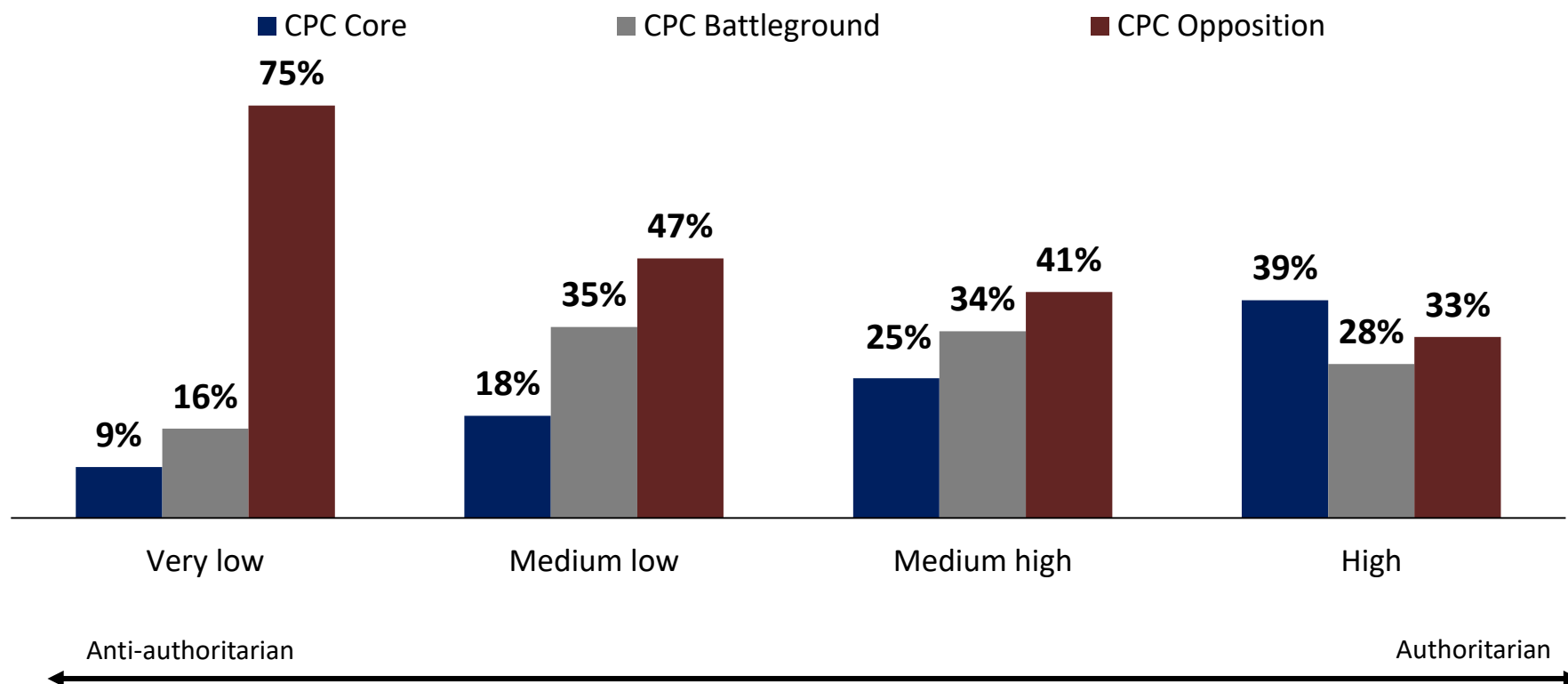
Q

If a federal election were held today, which party would you vote for? In that case, which party do you lean toward slightly? [VOTE + LEAN]

BY

Authoritarian Index (3 questions):

- Agree: Honour ways of forefathers, do what authorities tell us and get rid of rotten apples
- Agree: Old-fashioned ways and values still best way to live
- Agree: Country needs strong leader to destroy negative forces, silence troublemakers spreading bad ideas

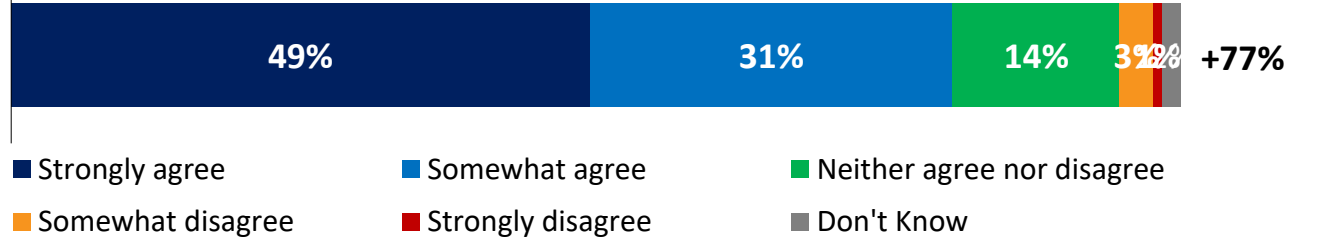


# CPC Universe by Additional Value Indices

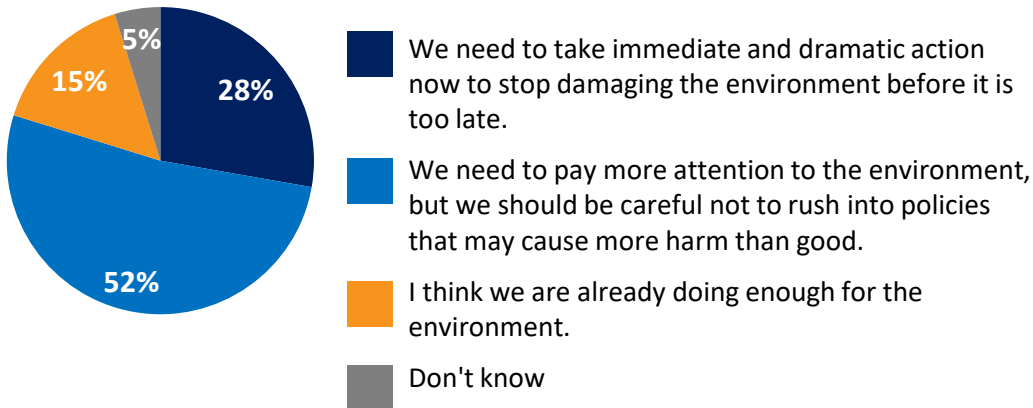
# Environment Index

Q Do you agree or disagree with the following statement?

Our wilderness areas are a legacy that we should protect for our children

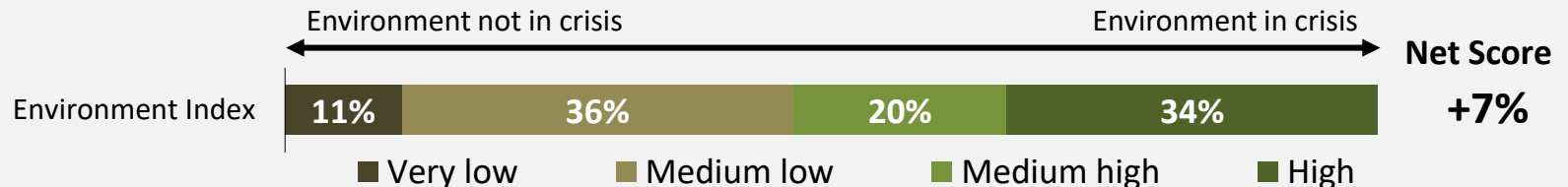
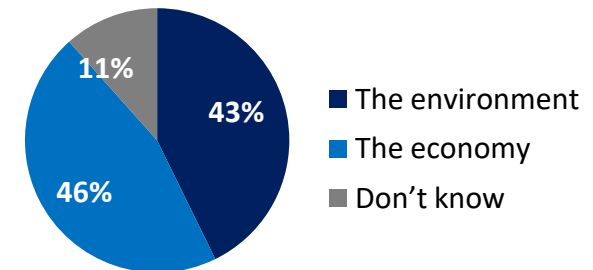


Q Which of the following statements best describes your personal point of view? We need to ...



Q

When it comes to trade-offs between the environment and the economy, which is more important to you?



# CPC Universe by Environment Index

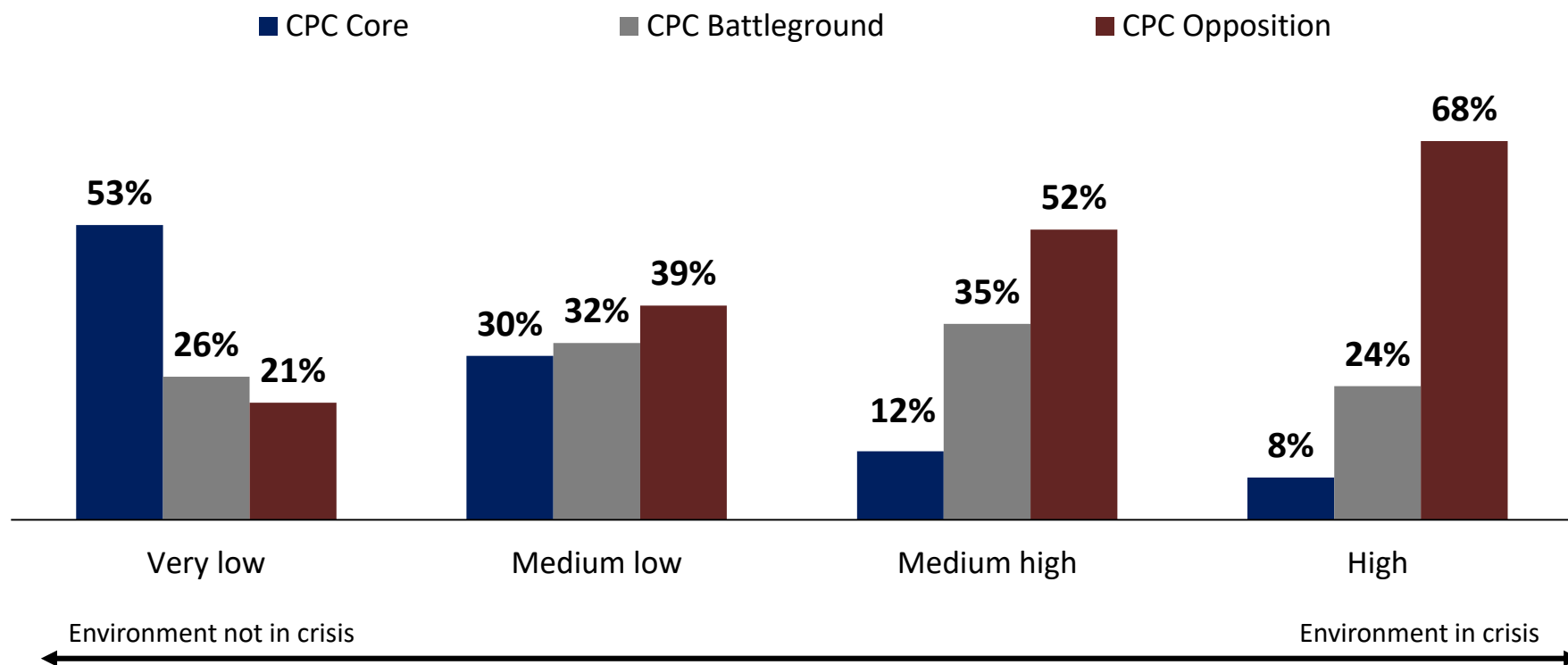
Q

If a federal election were held today, which party would you vote for? In that case, which party do you lean toward slightly? [VOTE + LEAN]

BY

Environment Index (3 questions):

- Environment over economy
- Need to take dramatic action to stop damaging environment before it's too late
- Agree: Wilderness is a legacy we should protect for our children





Immigrants should adapt to Canadian society and not the other way around



All Canadians should have the freedom to wear any item of clothing associated with their religious beliefs such as a headscarf, turban or crucifix



## Immigrants take jobs away from other Canadians



■ Strongly agree

■ Somewhat agree

■ Neither agree nor disagree


■ Somewhat disagree

Strongly disagree

■ Don't know

Frequency	Percentage
Daily	43%
Weekly	44%
Monthly	13%

■ The growing number of newcomers from other countries threaten traditional Canadian customs and values.

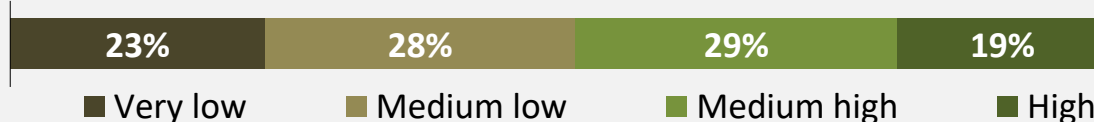
 The growing number of newcomers from other countries strengthens Canadian society

☐ Don't know

Not threatened by immigrants

Threatened by immigrants

## Nativism Index



## Net Score

**-3%**

# CPC Universe by Nativism Index

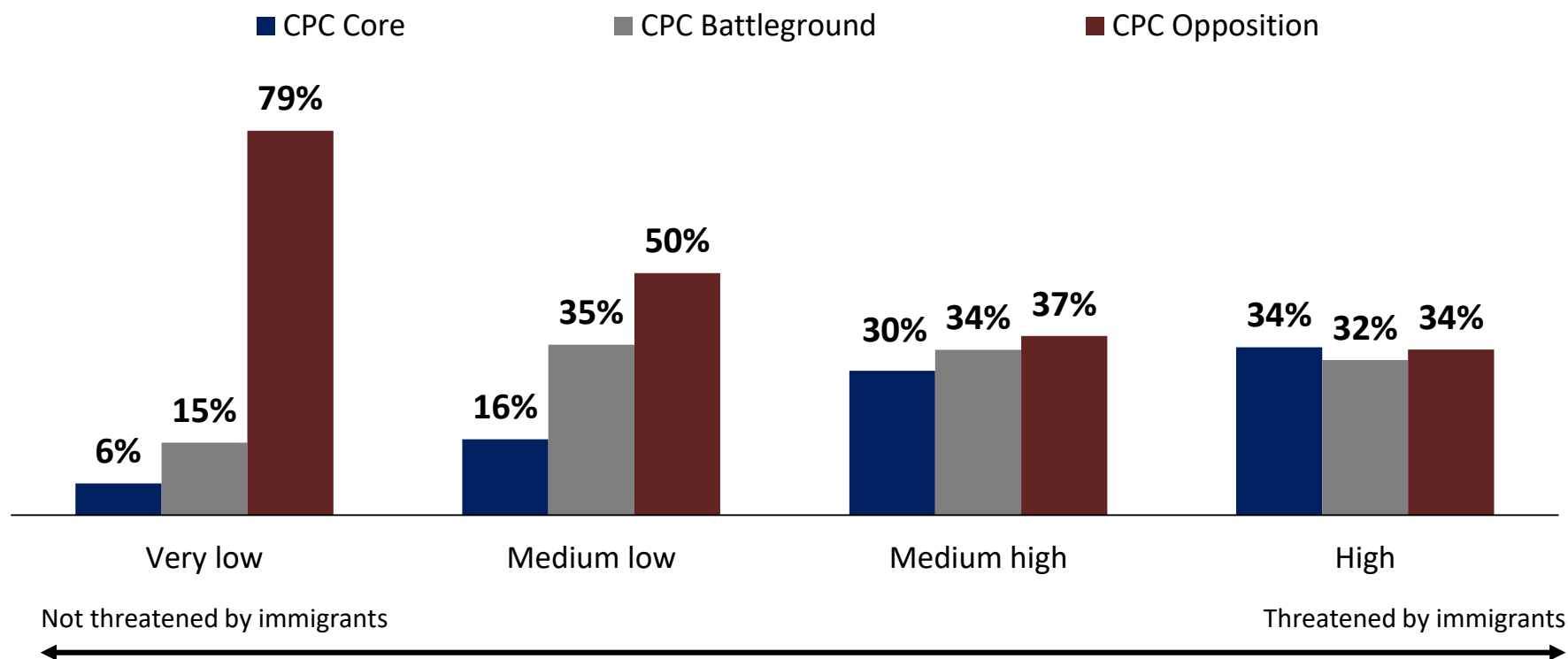
Q

If a federal election were held today, which party would you vote for? In that case, which party do you lean toward slightly? [VOTE + LEAN]

BY

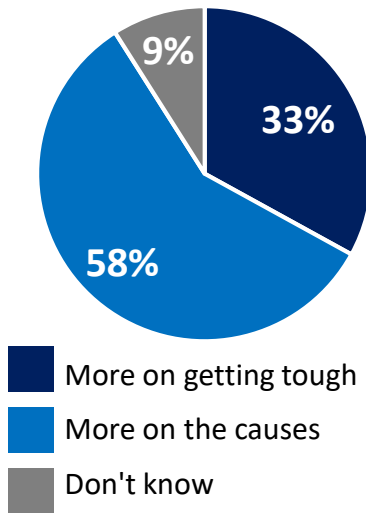
Nativism Index (4 questions):

- The growing number of newcomers from other countries threaten (NOT strengthens) traditional Canadian customs and values
- NOT Agree: All Canadians should have freedom to wear any item of clothing associated with their religious beliefs
- Agree: Immigrants take jobs away from other Canadians
- Agree: Immigrants should adapt to Canadian society and not the other way around

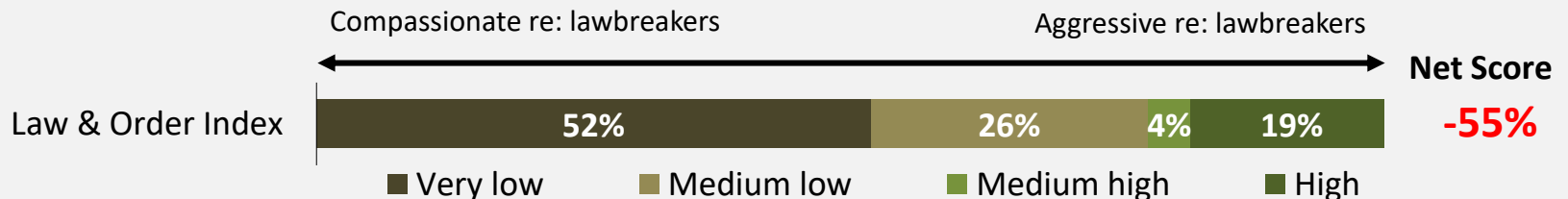
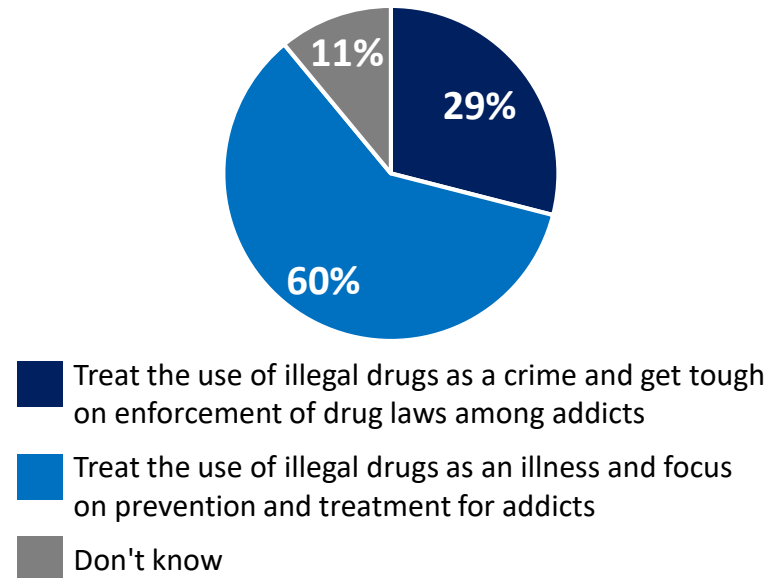


# Law & Order Index

**Q** If the government introduces new policies to deal with crime, should it focus more on getting tougher on crime or should it focus more on dealing with the causes of crime?



**Q** Do you think the best approach to drug abuse is...?



# CPC Universe by Law and Order Index

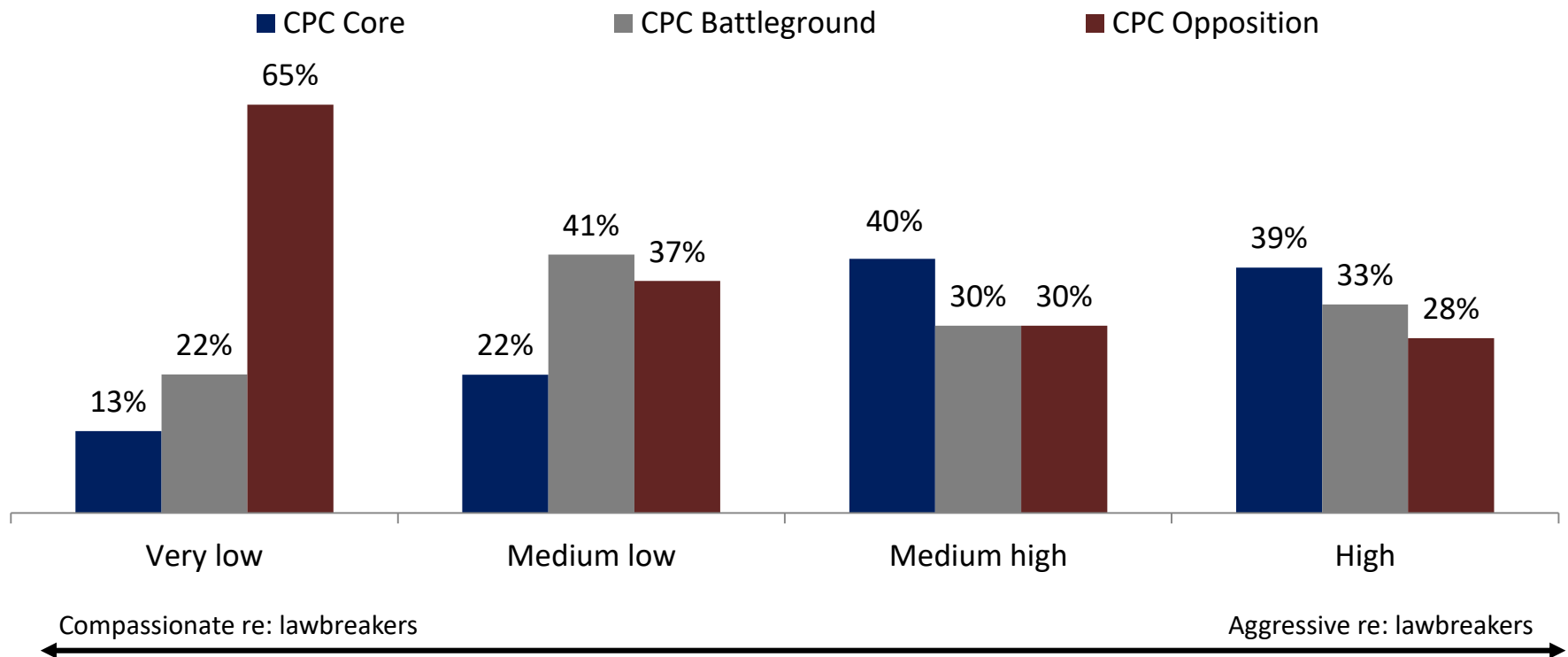
Q

If a federal election were held today, which party would you vote for? In that case, which party do you lean toward slightly? [VOTE + LEAN]

BY

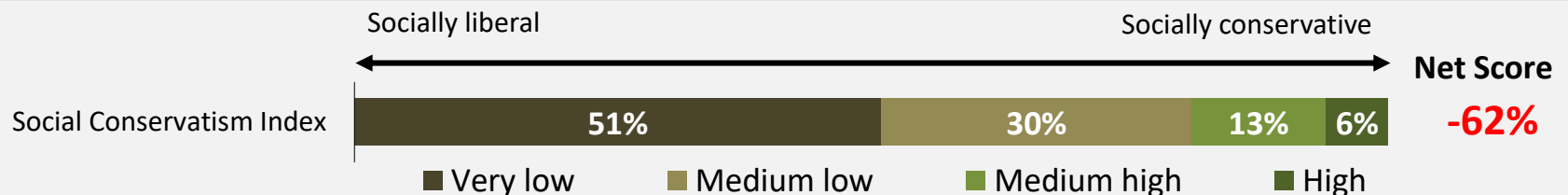
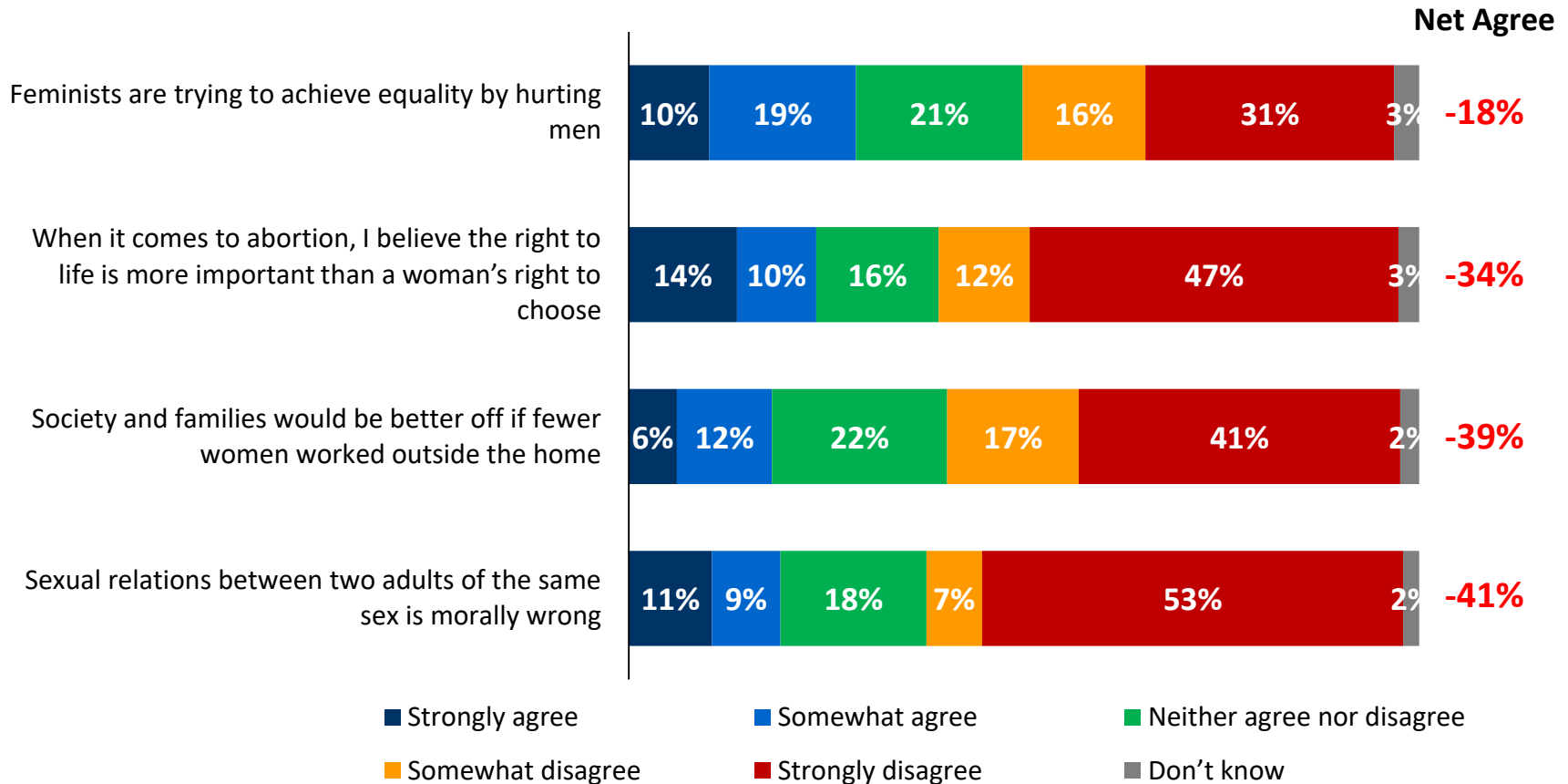
Law and Order Index (2 questions):

- Government should get tough on crime
- Best approach to drug abuse to treat as crime, tough on enforcement among addicts



# Social Conservatism Index

Q Do you agree or disagree with the following statements?



# CPC Universe by Social Conservatism Index

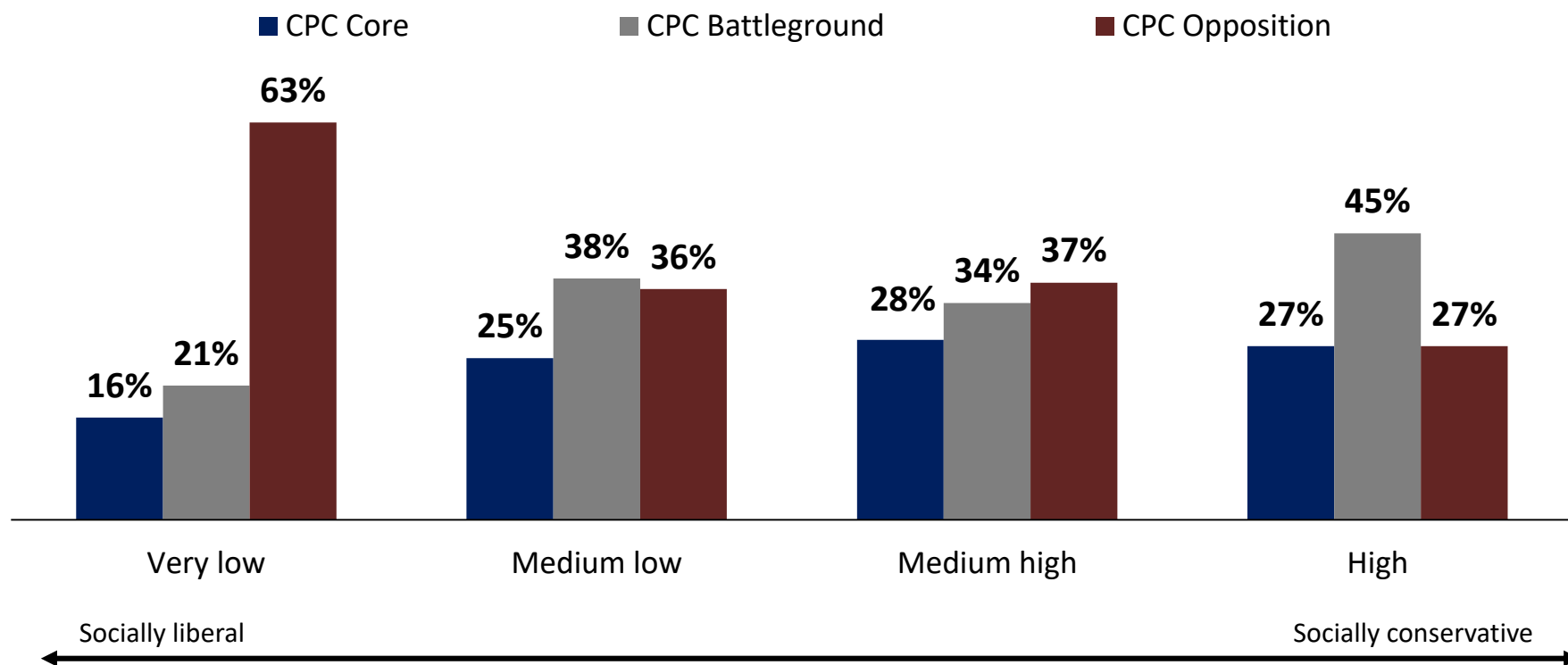
Q

If a federal election were held today, which party would you vote for? In that case, which party do you lean toward slightly? [VOTE + LEAN]

BY

Social Conservatism Index (4 questions):

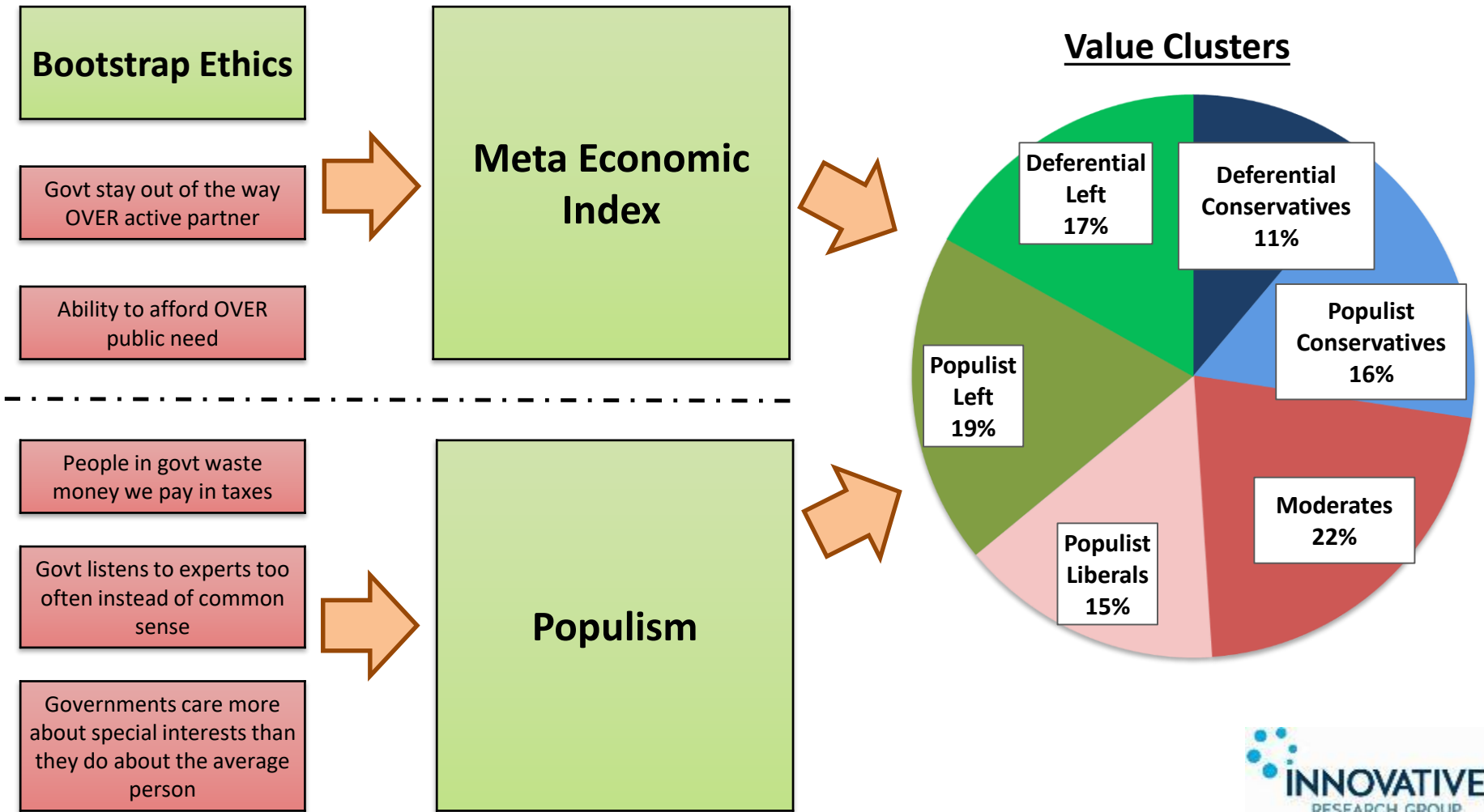
- Agree: Pro-life over woman's right to choose
- Agree: Sex between same-sex adults is wrong
- Agree: Feminists are trying to achieve equality by hurting men
- Agree: Society and families would be better off if fewer women worked outside the home



# Value Clusters

# Value Clusters

We created a set of value clusters based on two major axes: **populism** and **economic conservatism**. The measure of **populism** is drawn from three value statements on perceptions of government, as seen below. The measure of conservatism, called the **meta economic index**, is drawn from an index on **bootstrap ethics**, as well as statements on government intervention and spending priorities.





# What Defines Each Value Cluster?

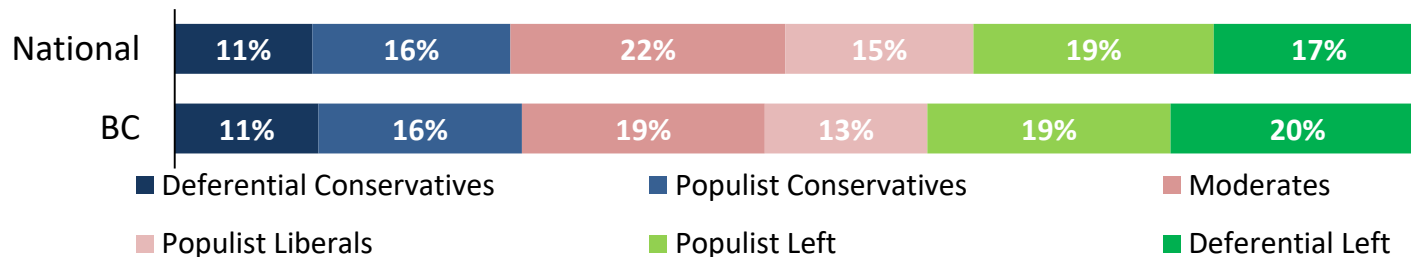
The table below shows the net score on the two key indices for each value cluster

Value Clusters							
	Overall	Deferential Conservatives	Populist Conservatives	Moderates	Populist Liberals	Populist Left	Deferential Left
Meta Economic Index	-2%	+100%	+100%	+16%	+22%	-100%	-100%
Populism Index	+33%	-60%	+100%	+28%	+100%	+100%	-100%

# CPC Universe by Cluster: At least a third of Moderates (38%) and Populist Liberals (34%) are CPC Battleground

Value Clusters						
	Deferential Conservatives	Populist Conservatives	Moderates	Populist Liberals	Populist Left	Deferential Left
CPC Core	24%	60%	16%	25%	7%	1%
CPC Battleground	32%	25%	38%	34%	25%	21%
CPC Opposition	44%	16%	46%	40%	67%	78%

# CPC Universe by Cluster in BC: A plurality (46%) of Deferential Conservatives in BC are CPC Opposition

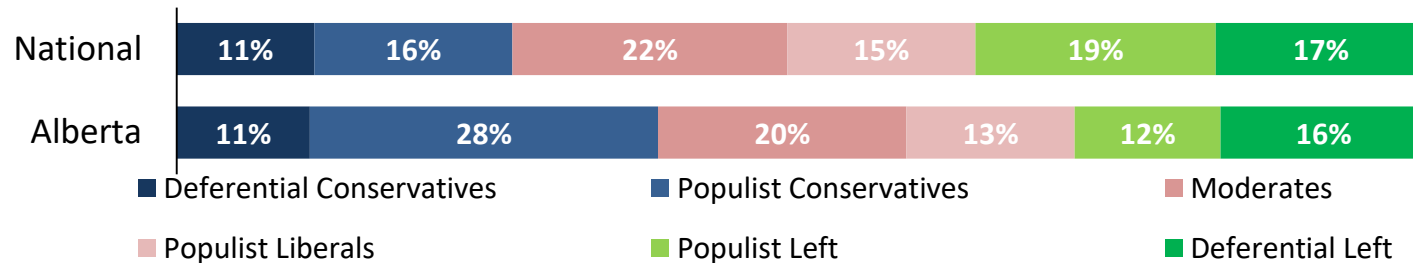


## Value Clusters

	Deferential Conservatives	Populist Conservatives	Moderates	Populist Liberals	Populist Left	Deferential Left
CPC Core	16%	53%	22%	30%	5%	2%
CPC Battleground	38%	31%	30%	21%	26%	15%
CPC Opposition	46%	16%	48%	49%	70%	83%

# CPC Universe by Cluster in Alberta: 4-in-10 (42%)

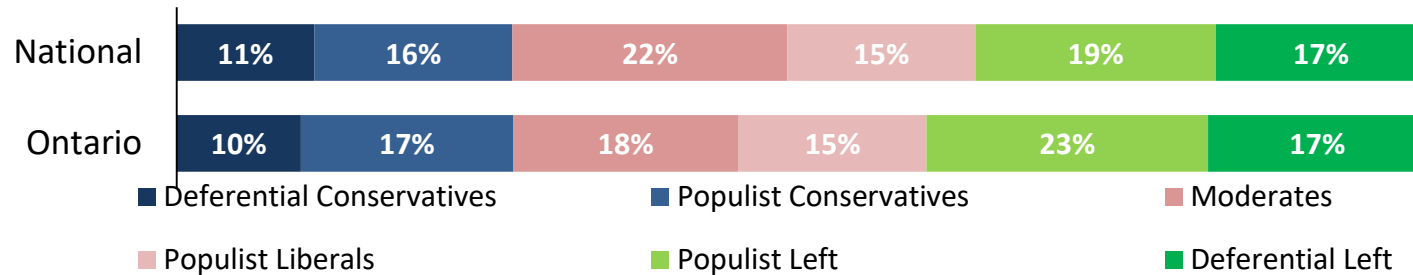
## Moderates in Alberta are CPC Battleground



### Value Clusters

	Deferential Conservatives	Populist Conservatives	Moderates	Populist Liberals	Populist Left	Deferential Left
CPC Core	46%	76%	24%	62%	25%	6%
CPC Battleground	34%	21%	42%	22%	29%	17%
CPC Opposition	20%	3%	35%	16%	46%	77%

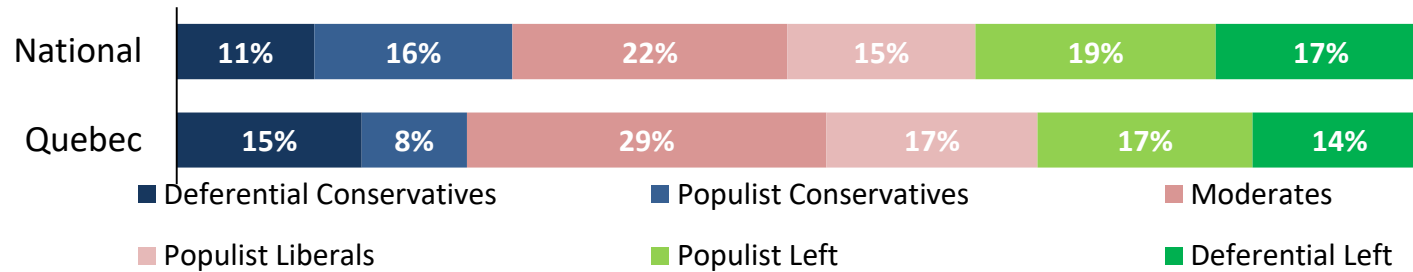
# CPC Universe by Cluster in Ontario: Almost half (46%) of Populist Liberals in Ontario are CPC Battleground



## Value Clusters

	Deferential Conservatives	Populist Conservatives	Moderates	Populist Liberals	Populist Left	Deferential Left
CPC Core	28%	67%	17%	23%	7%	0%
CPC Battleground	28%	19%	35%	46%	24%	15%
CPC Opposition	44%	14%	48%	31%	69%	85%

# CPC Universe by Cluster in Quebec: A majority of all but Populist Conservatives in Quebec are CPC Opposition



Value Clusters

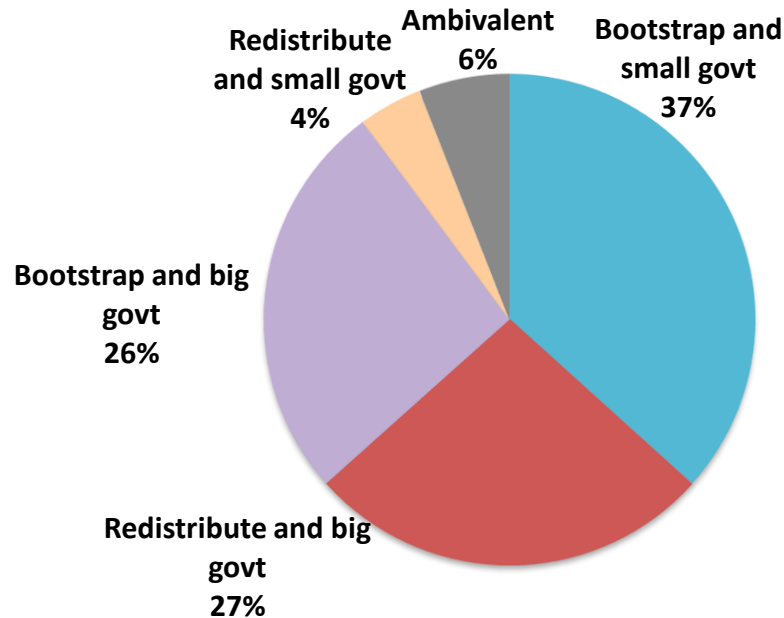
	Deferential Conservatives	Populist Conservatives	Moderates	Populist Liberals	Populist Left	Deferential Left
CPC Core	13%	24%	7%	15%	2%	2%
CPC Battleground	35%	37%	40%	25%	31%	37%
CPC Opposition	52%	39%	54%	60%	67%	62%

# Value Trade-Off Analysis

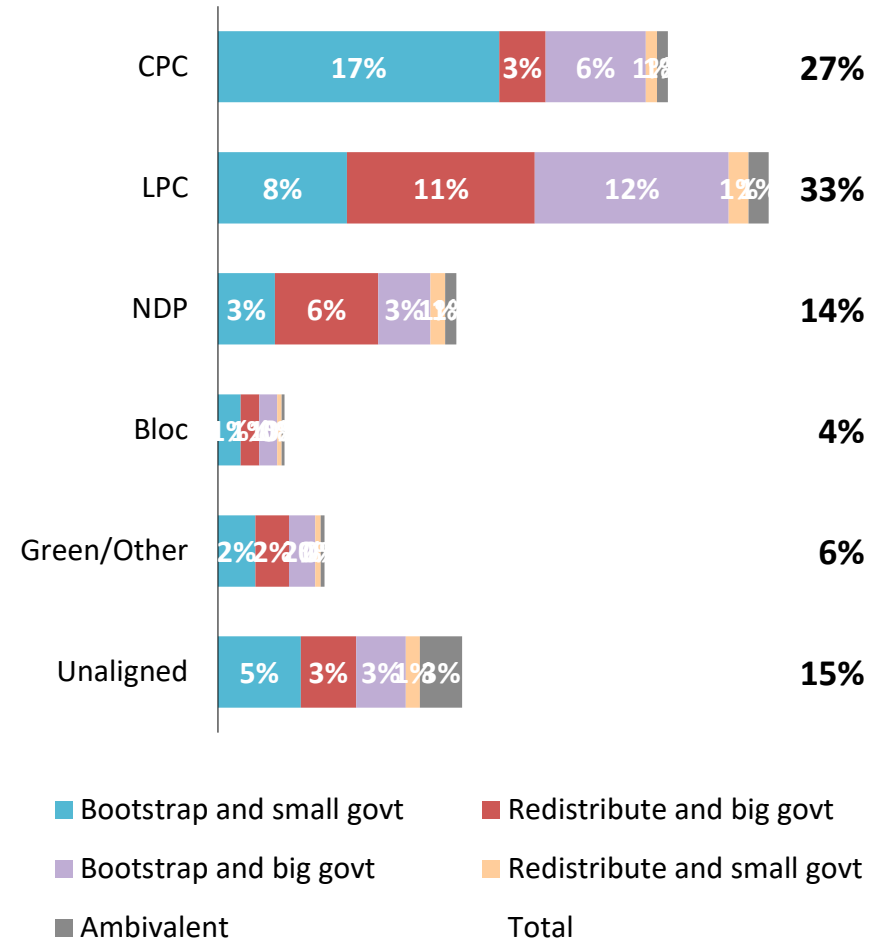
# CPC has big opportunity with LPC voters who value equal opportunity over redistribution

We study value trade-offs to understand how trade-offs between different dimensions could impact vote choice. Some people's values align consistently with one party, but others are conflicted. The policy and messaging choices that parties make have an impact on where these conflicted voters end up come election day.

Here we are examining the trade-off between **bootstrap ethics** and **government interventionism**.



## Value trade-offs within vote choice



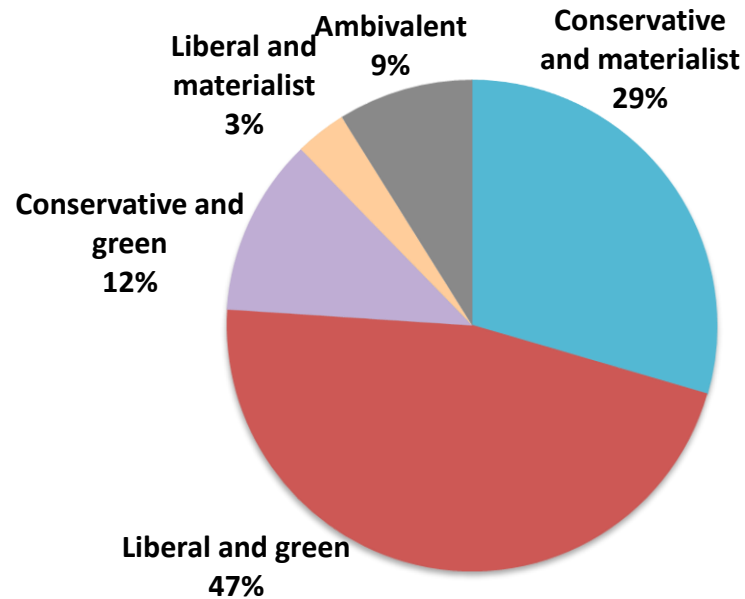
\*Note: "Bootstrap/small govt" and "Redistribute/big govt" voters include both those who hold a left or right view on each value dimension and also those who hold a view on one dimension and are ambivalent on the other. Ambivalent voters are those who are ambivalent on *both* dimensions.



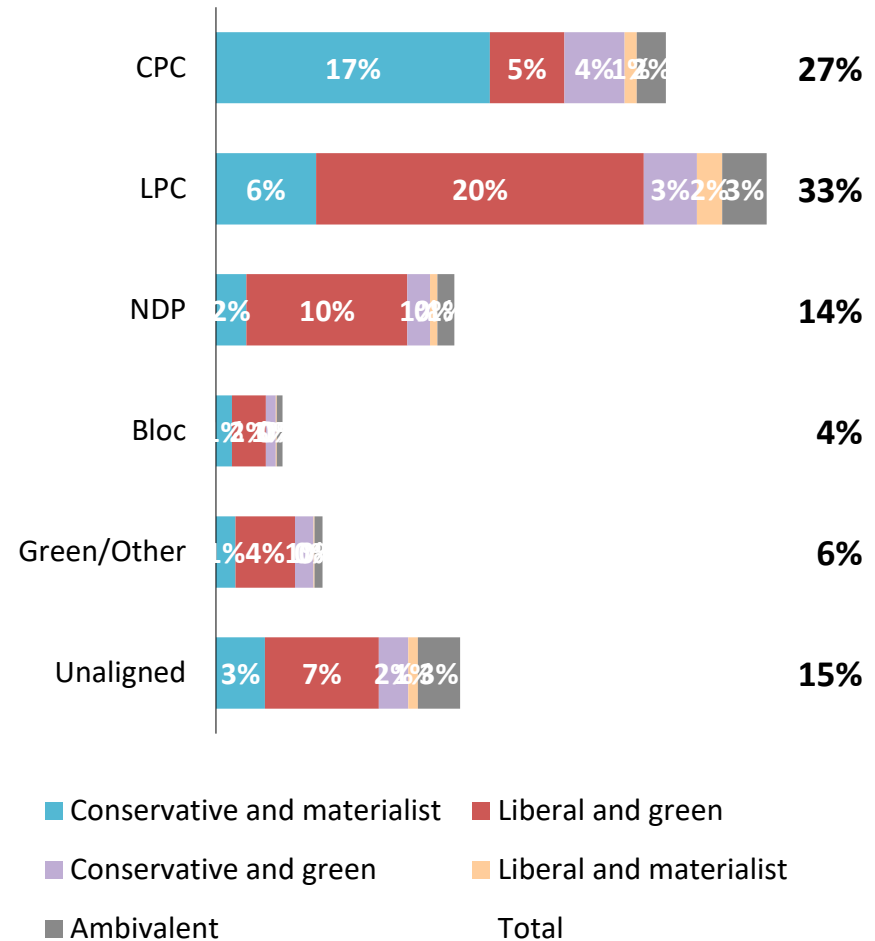
# If economically conservative/green conflicted voters switched from LPC to CPC, race would be tied

We study value trade-offs to understand how trade-offs between different dimensions could impact vote choice. Some people's values align consistently with one party, but others are conflicted. The policy and messaging choices that parties make have an impact on where these conflicted voters end up come election day.

Here we are examining the trade-off between **economic conservatism** and **environmentalism**.



## Value trade-offs within vote choice



\*Note: "Conservative/materialist" and "Liberal/green" voters include both those who hold a left or right view on each value dimension and also those who hold a view on one dimension and are ambivalent on the other. Ambivalent voters are those who are ambivalent on *both* dimensions.



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