2019 Election: Values
September Survey Results

INNOVATIVE
RESEARCH GROUP

September 2019

Methodology

This is the second release from INNOVATIVE of an online survey conducted between August 30th and September 5th, 2019. While the first release looked in depth at specific riding clusters, this release focuses on the values voters hold.

This online survey of 3,236 adult Canadians was conducted using Dynata, a leading provider of online samples. The results are weighted to n=2,500 based on Census data from Statistics Canada.

Respondents from the Dynata panel are recruited from a wide variety of sources to reflect the age, gender, region, and language 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. Sub-regional quotas are set within regions to ensure there is a representative sample of respondents from across the entire region.

A total of 549 panelists started but did not finish the survey and another 247 panelists were screened out.

Confidence: This is a representative sample. However, since the online survey was not a random probability based sample, a margin of error cannot be calculated. Statements about margins of sampling error or population estimates do not apply to most online panels.

Weighting: Results for Canada are weighted by age, gender, and region to ensure that the overall sample's composition reflects that of the actual population according to Census data; in order to provide results that are intended to approximate a probability. Weighted and unweighted frequencies are reported in the table.

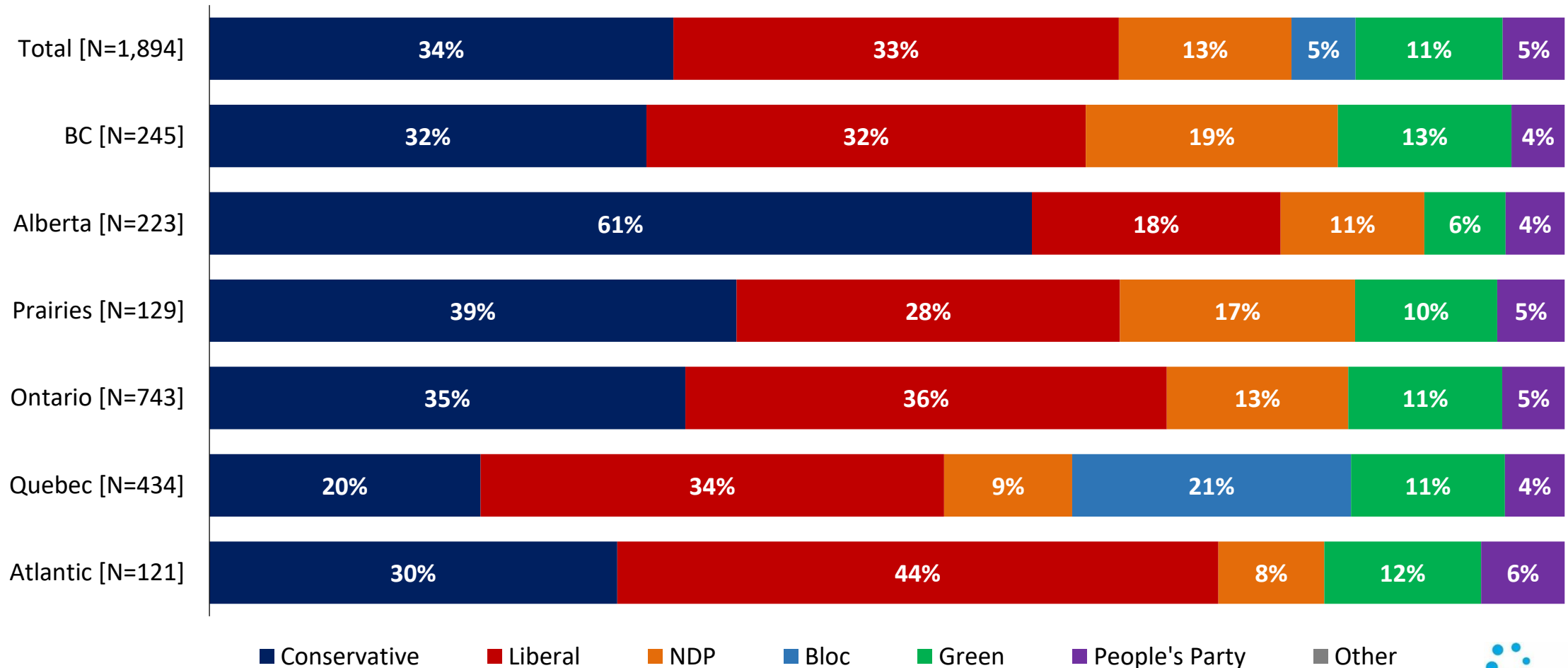|	Unweighted (n)	Unweighted (%)	Weighted (n)	Weighted (%)
Males 18-34	269	8.3%	341	13.7%
Males 35-54	510	15.8%	418	16.7%
Males 55+	681	21.1%	452	18.1%
Females 18-34	437	13.5%	340	13.6%
Females 35-54	593	18.4%	434	17.4%
Females 55+	741	22.9%	511	20.5%
BC	393	12.1%	341	13.6%
Alberta	277	8.6%	285	11.4%
Prairies	164	5.1%	167	6.7%
Ontario	1245	38.5%	953	38.1%
Quebec	980	30.3%	586	23.4%
Atlantic	177	5.5%	168	6.7%

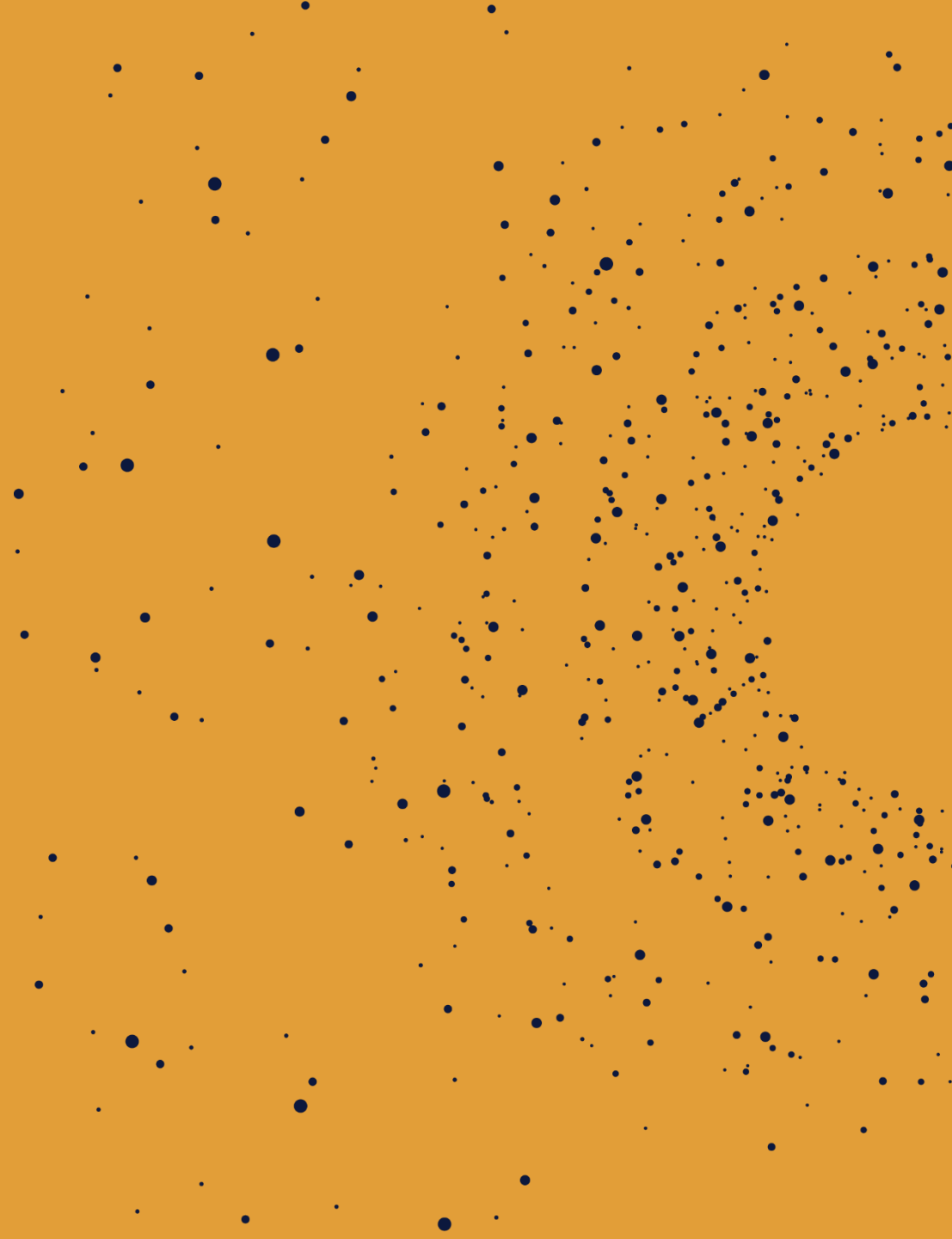# Federal Vote
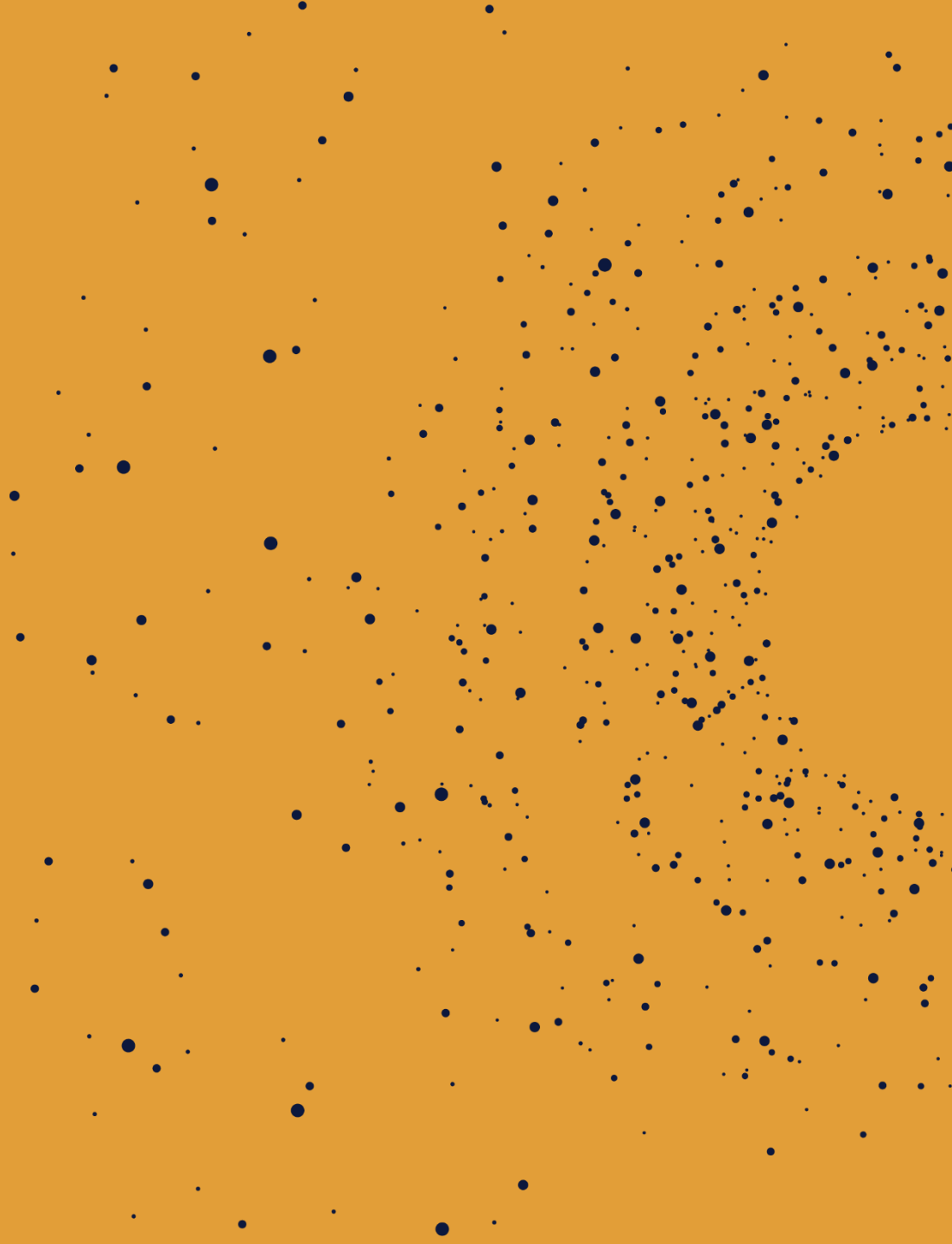
Decided Vote by Region

Q AUGUST-SEPTEMBER: If the federal election were held today, how likely would you be to vote for each of the following federal political parties? Please answer on a scale from 0 to 10 where 0 means you definitely will not vote for that party and 10 means you definitely will vote for that party.

[Vote choice defined as the party a respondent ranks the highest. Ties are treated as undecided voters. Voters who are undecided or select don't know for every party are not shown]

Region	Conservative	Liberal	NDP	Bloc	Green	People's Party
Total [N=1,894]	34%	33%	13%	5%	11%	5%
BC [N=245]	32%	32%	19%		13%	4%
Alberta [N=223]	61%	18%	11%		6%	4%
Prairies [N=129]	39%	28%	17%		10%	5%
Ontario [N=743]	35%	36%	13%		11%	5%
Quebec [N=434]	20%	34%	9%	21%	11%	4%
Atlantic [N=121]	30%	44%	8%		12%	6%

■ Conservative ■ Liberal ■ NDP ■ Bloc ■ Green ■ People's Party ■ Other
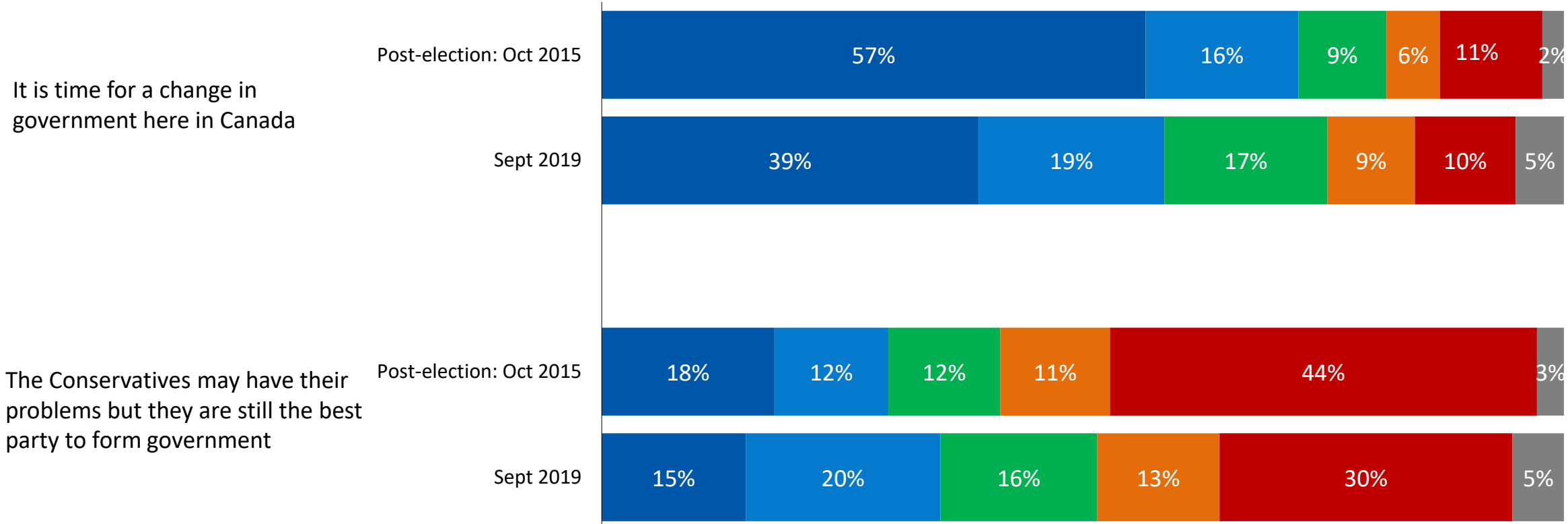
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Time-for-a-Change:

2015 Post-election vs. Now

Key attitudes: Strong agreement that it is time for a change is 18-points lower now (39%) than for CPC loss in 2015 (57%)

Q Do you agree or disagree with the following statements?
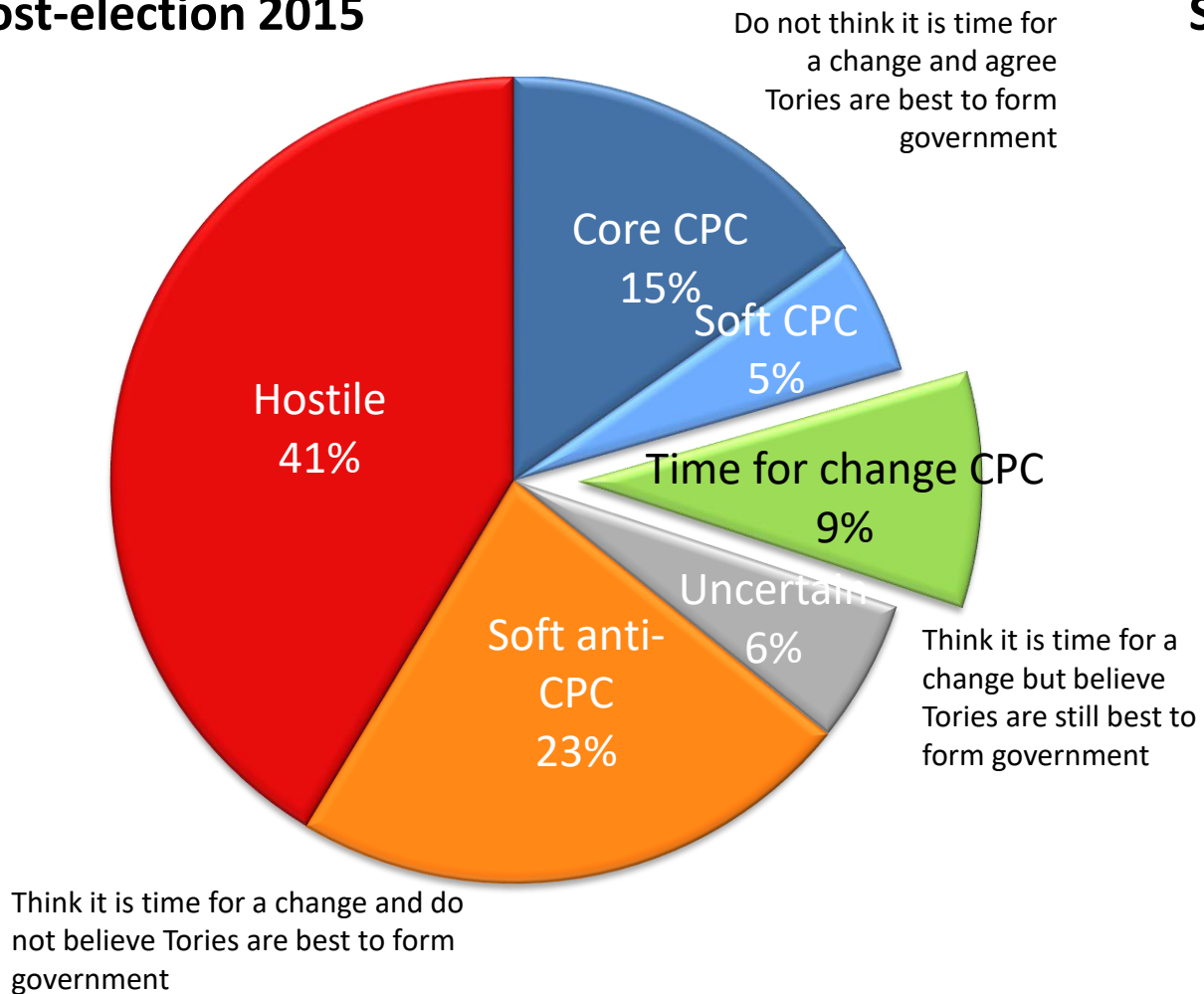[2015 Post-election: n=2000; September 2019: n=2,500; all respondents]

It is time for a change in government here in Canada

	Strongly agree	Somewhat agree	Neither agree nor disagree	Somewhat disagree	Strongly disagree	Don't know
Post-election: Oct 2015	57%	16%	9%	6%	11%	2%
Sept 2019	39%	19%	17%	9%	10%	5%

The Conservatives may have their problems but they are still the best party to form government

	Strongly agree	Somewhat agree	Neither agree nor disagree	Somewhat disagree	Strongly disagree	Don't know
Post-election: Oct 2015	18%	12%	12%	11%	44%	3%
Sept 2019	15%	20%	16%	13%	30%	5%

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

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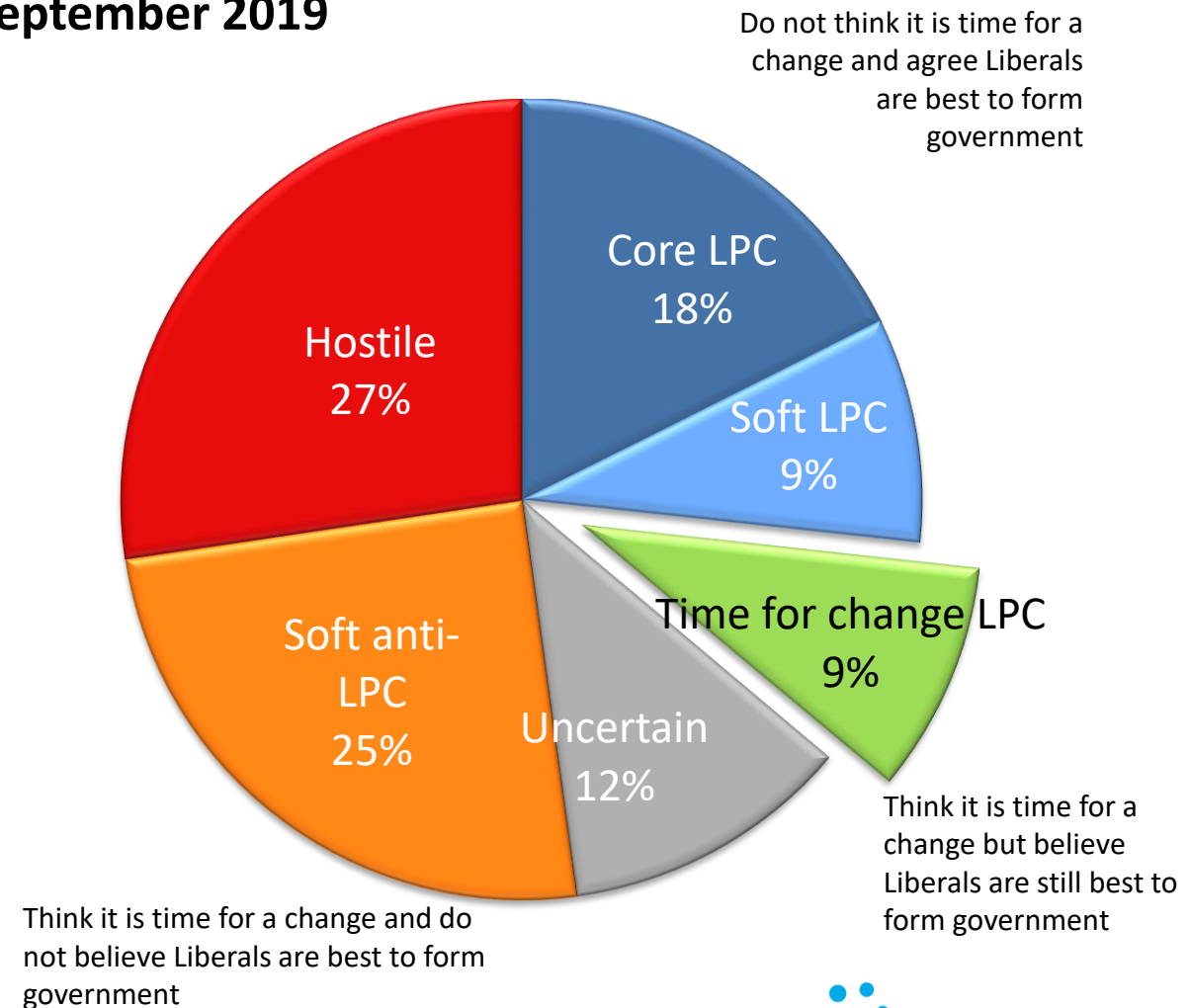
Time for Change Segmentation

Post-election 2015

Do not think it is time for a change and agree Tories are best to form government

Core CPC 15%

Soft CPC 5%

Hostile 41%

Time for change CPC 9%

Uncertain 6%

Think it is time for a change but believe Tories are still best to form government

Soft anti-CPC 23%

Think it is time for a change and do not believe Tories are best to form government

September 2019

Do not think it is time for a change and agree Liberals are best to form government

Core LPC 18%

Soft LPC 9%

Hostile 27%

Time for change LPC 9%

Uncertain 12%

Think it is time for a change but believe Liberals are still best to form government

Soft anti-LPC 25%

Think it is time for a change and do not believe Liberals are best to form government

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In the end nearly 1-in-2 TfC Tories voted CPC, but LPC performed well among soft-antis and hostiles
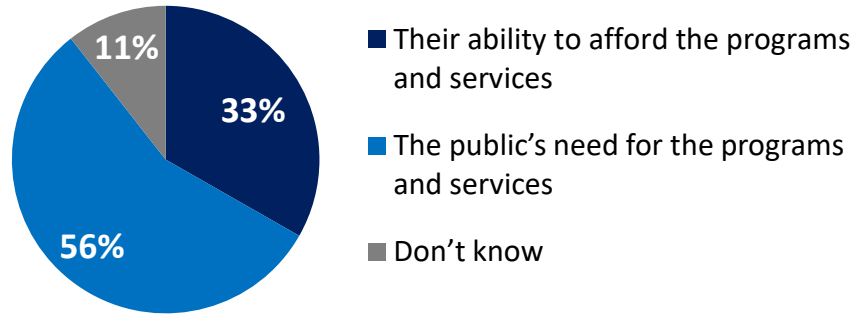
Time for a change segmentations

	Core Supporter		Soft Supporter		Time-for-change Supporter		Uncertain		Soft Anti		Hostile	
	2015 Post election	Sept. 2019	2015 Post election	Sept. 2019	2015 Post election	Sept. 2019	2015 Post election	Sept. 2019	2015 Post election	Sept. 2019	2015 Post election	Sept. 2019
CPC	**95%**	1%	**83%**	8%	**46%**	14%	**29%**	19%	**6%**	40%	**1%**	69%
Liberal	1%	**93%**	6%	**65%**	34%	**44%**	27%	**24%**	55%	**8%**	55%	**1%**
NDP	1%	3%	1%	7%	13%	16%	25%	26%	22%	22%	32%	11%
Bloc Quebecois	2%	1%	3%	5%	2%	2%	5%	9%	9%	7%	6%	5%
People's Party	N/A	1%	N/A	2%	N/A	8%	N/A	10%	N/A	7%	N/A	4%
Green/Other	1%	2%	2%	14%	4%	16%	10%	11%	7%	16%	5%	10%

Decided Vote

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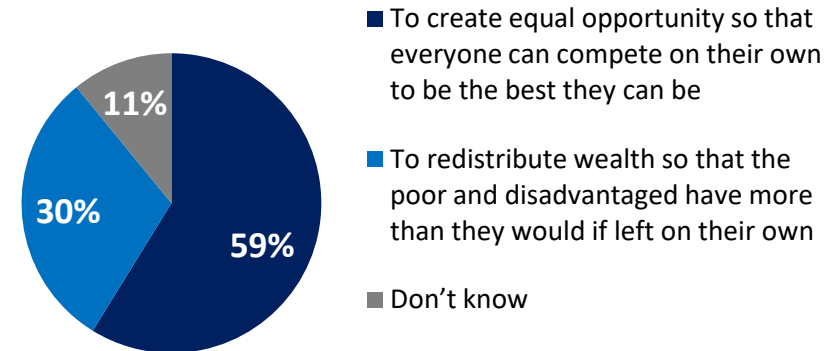
2015 Value Clusters:
Where are we now?
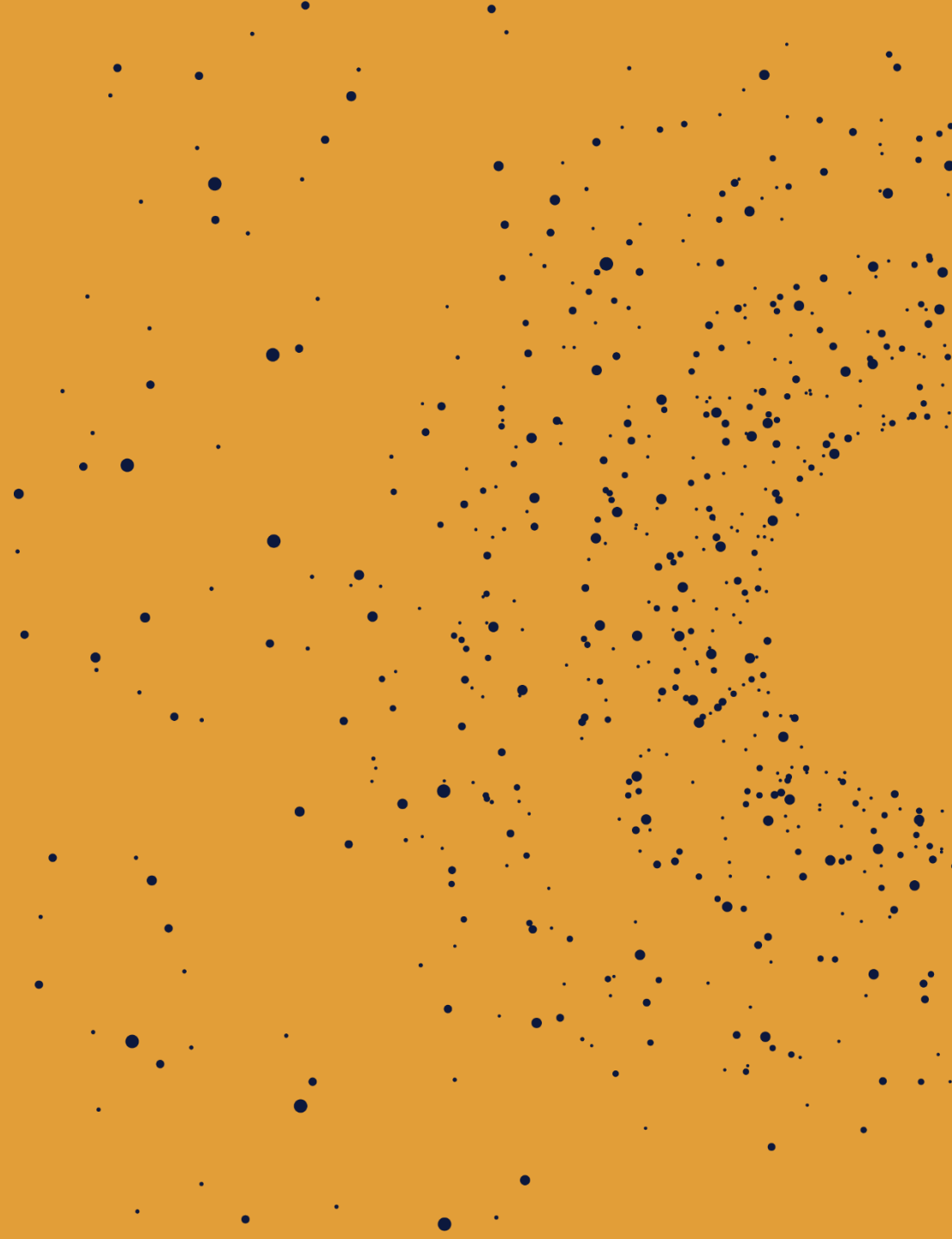
Core Political Values: Tracked since the 2015 federal election

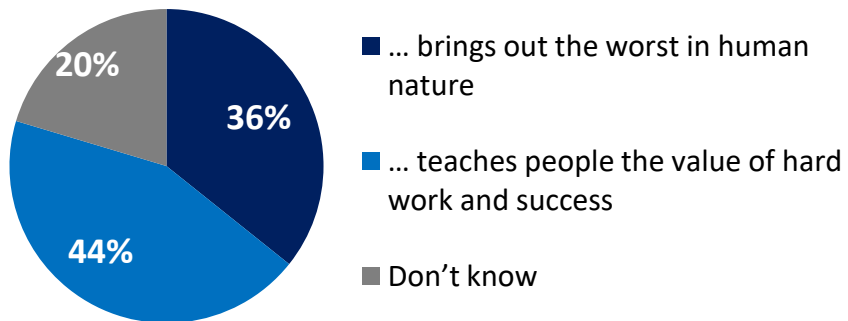**Q** When governments make major decisions concerning spending on programs and services, do you think they should be based on …?
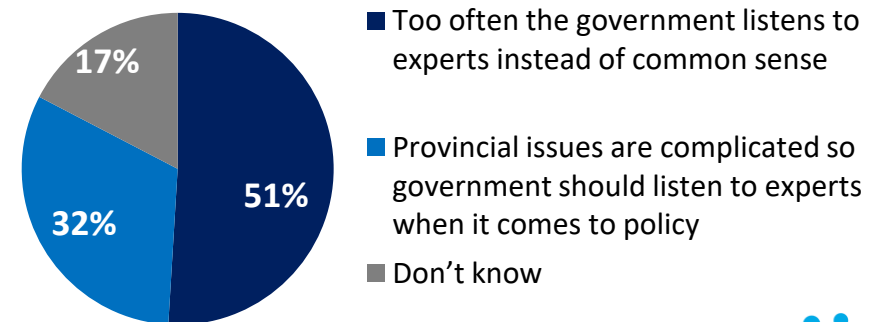

- **Their ability to afford the programs and services** — 33%
- **The public's need for the programs and services** — 56%
- **Don't know** — 11%

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** — 59%
- **To redistribute wealth so that the poor and disadvantaged have more than they would if left on their own** — 30%
- **Don't know** — 11%

Q Which one of the following statements comes closest to your view? The profit system …

- **… brings out the worst in human nature** — 36%
- **… teaches people the value of hard work and success** — 44%
- **Don't know** — 20%

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** — 51%
- **Provincial issues are complicated so government should listen to experts when it comes to policy** — 32%
- **Don't know** — 17%

Note: Showing September 2019 results.

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Value Clusters: Respondents are clustered into groups based on their answers to the core value questions

Clusters are based on 4 basic values: equal opportunity versus redistribution; trust in the profit system; whether spending should be based on ability to afford or public need; and whether government should listen to experts or common sense.
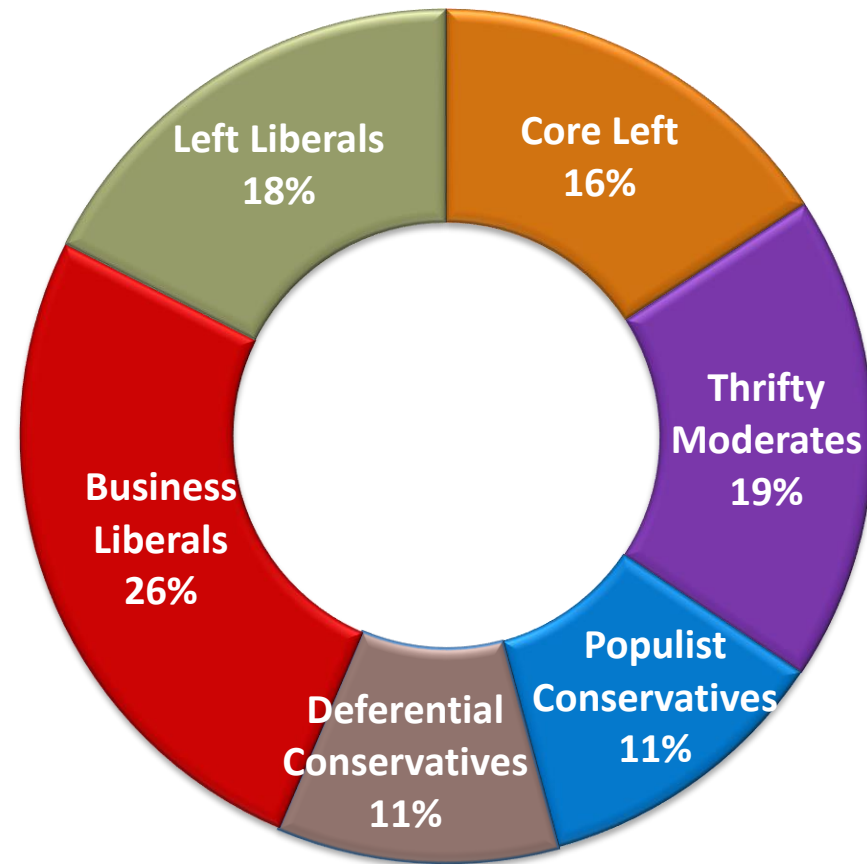
Note: Showing September 2019 results.

Defining Value Clusters

Core Political Values by Value Clusters

| Column %		Core Left	Thrifty Moderates	Populist Conservatives	Deferential Conservatives	Business Liberals	Left Liberals
Is the main role of government to …?	Create equal opportunity	0%	32%	99%	72%	65%	97%
	Redistribute wealth	96%	36%	0%	20%	24%	0%
The profit system …	Brings out worst in human nature	76%	57%	0%	0%	0%	75%
	Teaches value of hard work and success	0%	8%	83%	89%	90%	0%
When gov't make decisions on spending on programs/services, do you think they should base their decisions on…	Ability to afford	0%	74%	88%	90%	0%	0%
	Public need	94%	0%	0%	0%	96%	93%
When it comes to government decision making…	Rely on common sense	53%	49%	100%	0%	48%	56%
	Listen to experts	30%	19%	0%	84%	39%	25%

Note: Showing September 2019 results.

Value Clusters: The Liberals are down among the Core Left, a group that was critical to their 2015 election win
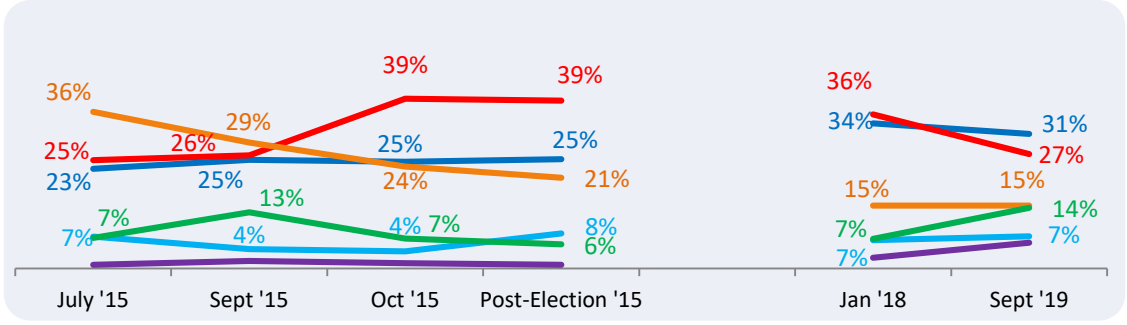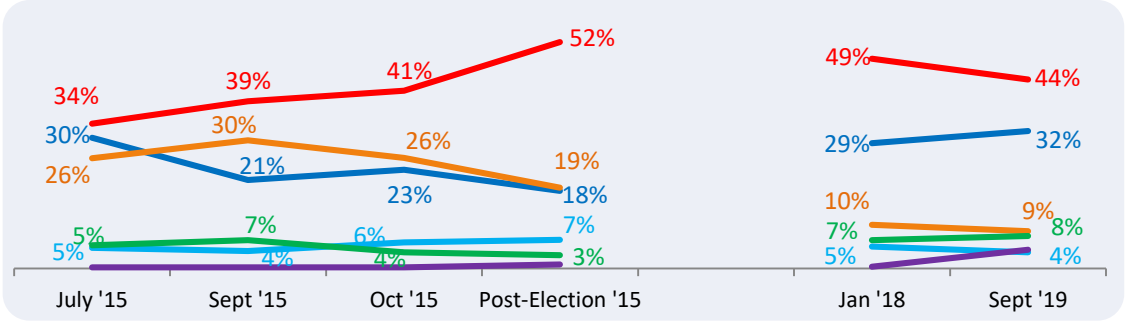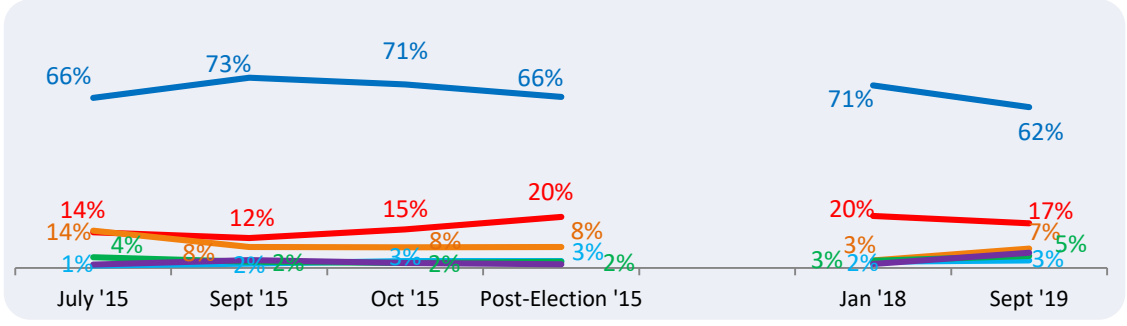
Core Left
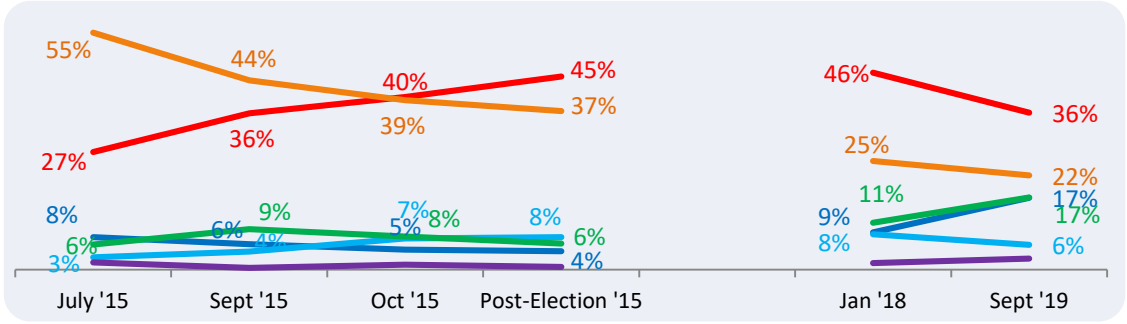
Left Liberals
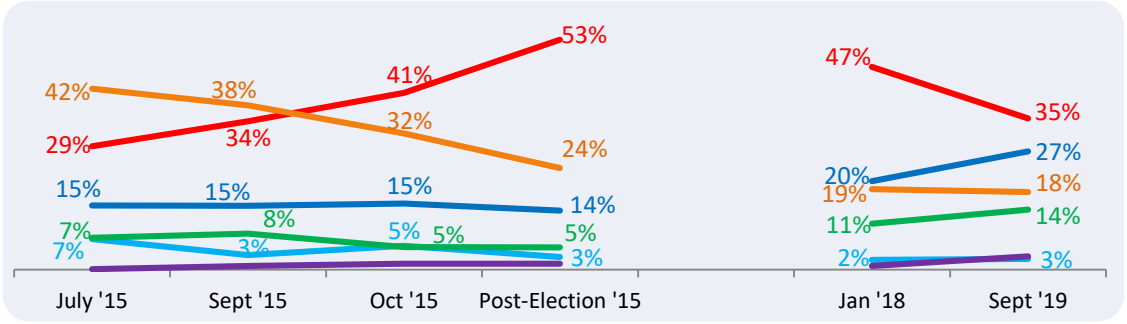
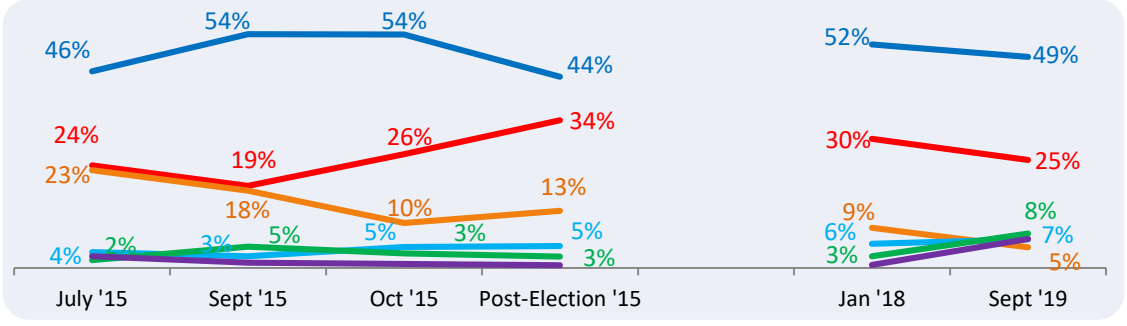

Thrifty Moderates

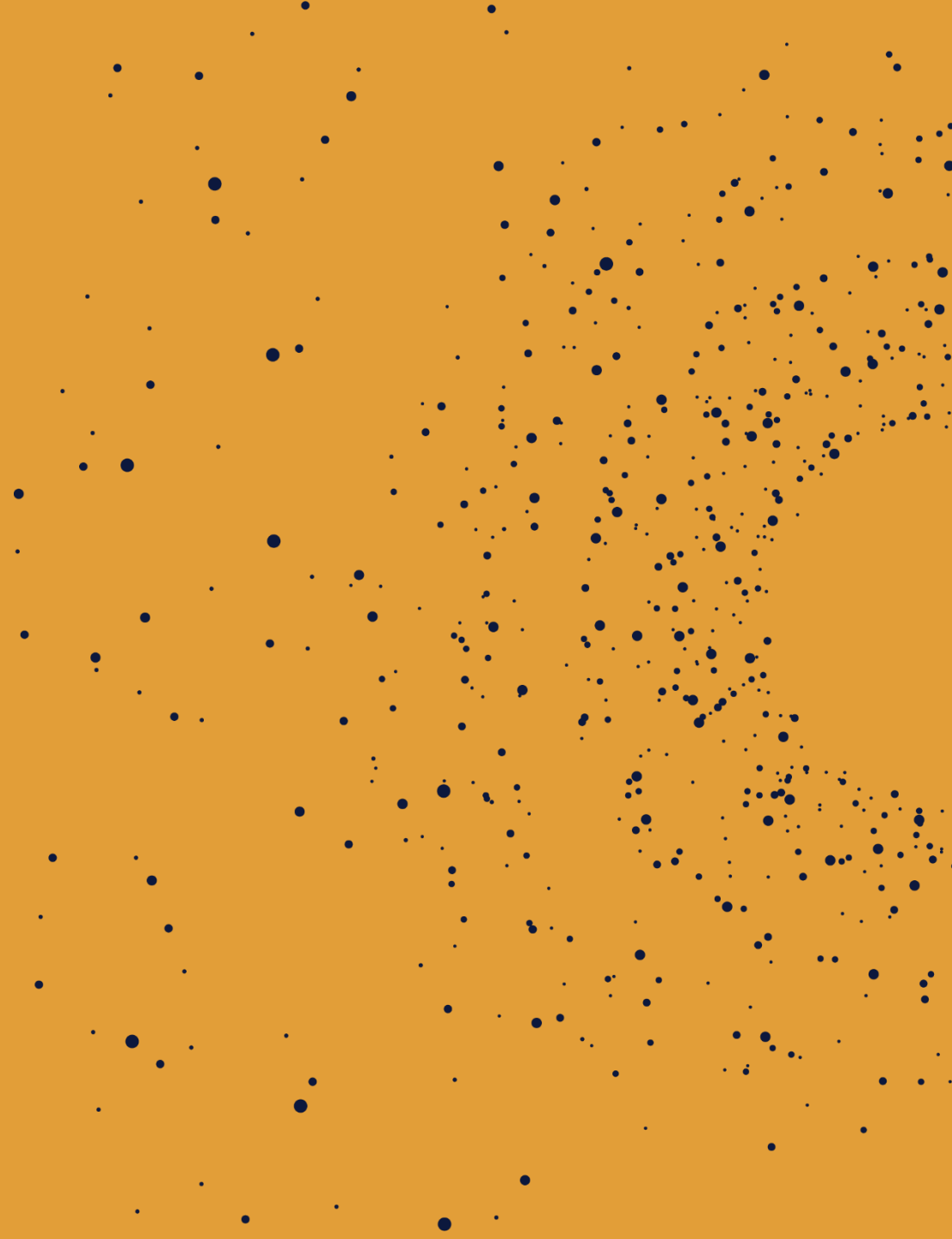## Business Liberals

Populist Conservatives

Deferential Conservatives

Note: Individual charts use different scales.
Use caution when comparing across charts.

Decided vote: **Liberal** **Conservative** **NDP** **Green** **Bloc** **PPC/Other**
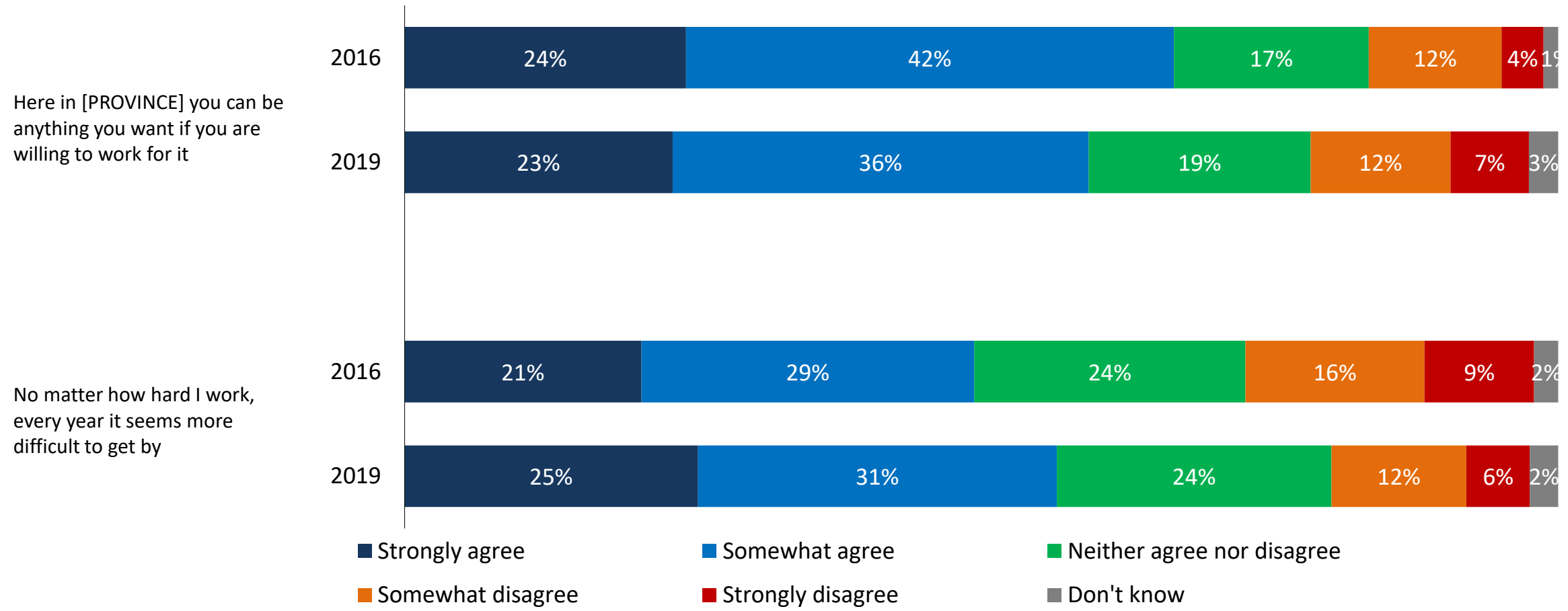
The Economic Gap

Segmentation Attitudes: A majority of Canadians both believe in the Canadian dream and say it is harder to get by

Q Now turning to a different subject...Do you agree or disagree with the following statements?
[asked of all respondents]

Here in [PROVINCE] you can be anything you want if you are willing to work for it

Year	Strongly agree	Somewhat agree	Neither agree nor disagree	Somewhat disagree	Strongly disagree	Don't know
2016	24%	42%	17%	12%	4%	1%
2019	23%	36%	19%	12%	7%	3%

No matter how hard I work, every year it seems more difficult to get by

Year	Strongly agree	Somewhat agree	Neither agree nor disagree	Somewhat disagree	Strongly disagree	Don't know
2016	21%	29%	24%	16%	9%	2%
2019	25%	31%	24%	12%	6%	2%

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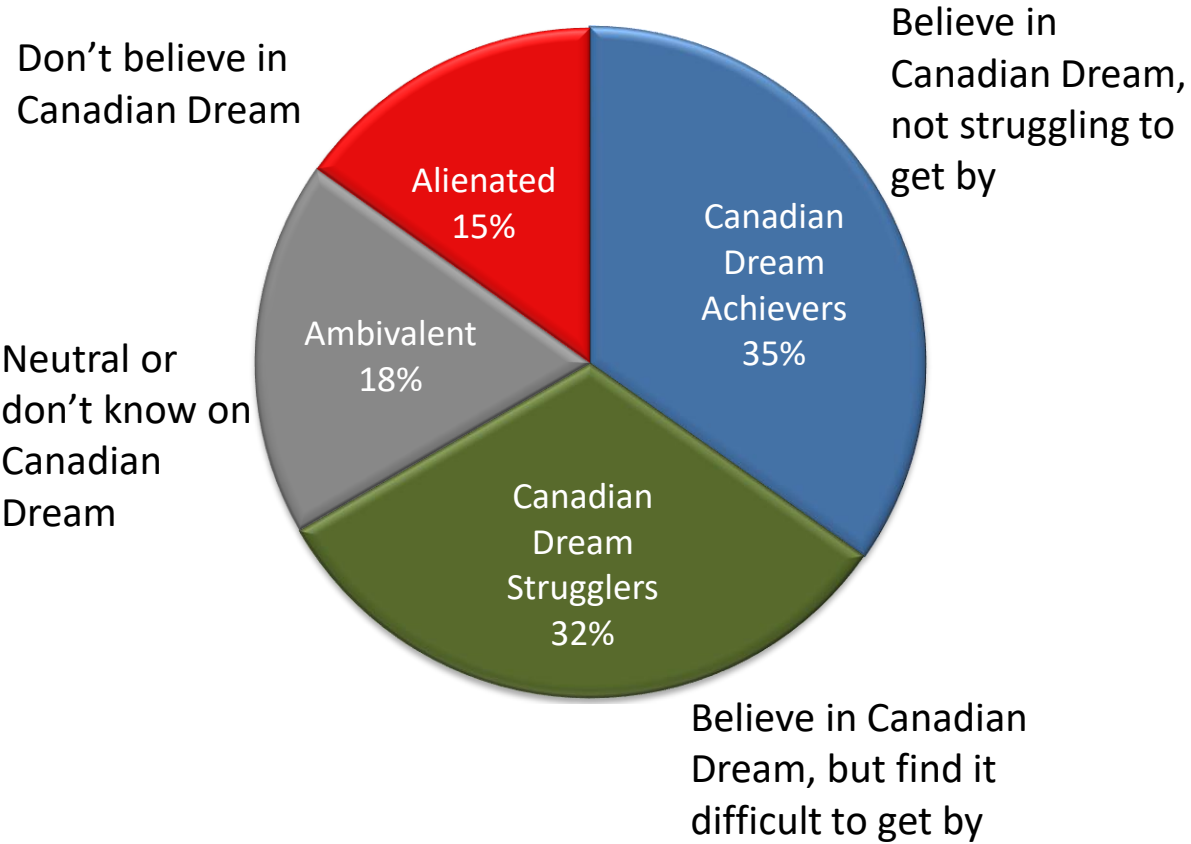- Don't know

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Economic Gap Segmentation: A third of respondents (33%) believe in the Canadian dream but are struggling to get by
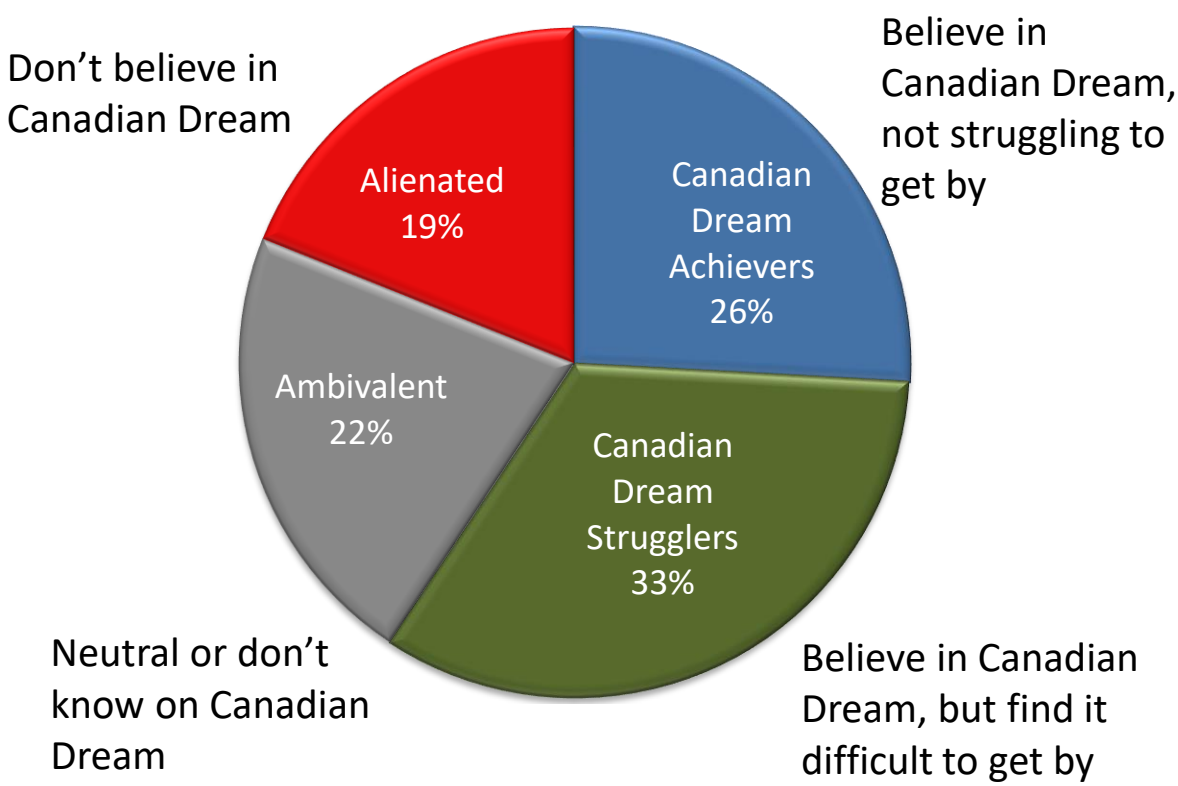
Q Gap segmentation: Agree with *"Here in [PROVINCE] you can be anything you want if you are willing to work for it"* BY Agree with *"No matter how hard I work, every year it seems more difficult to get by"*.

Post-election 2015

Don't believe in Canadian Dream

Believe in Canadian Dream, not struggling to get by

Neutral or don't know on Canadian Dream

Believe in Canadian Dream, but find it difficult to get by

- Alienated 15%
- Ambivalent 18%
- Canadian Dream Achievers 35%
- Canadian Dream Strugglers 32%

September 2019

Don't believe in Canadian Dream

Believe in Canadian Dream, not struggling to get by

Neutral or don't know on Canadian Dream

Believe in Canadian Dream, but find it difficult to get by

- Alienated 19%
- Ambivalent 22%
- Canadian Dream Achievers 26%
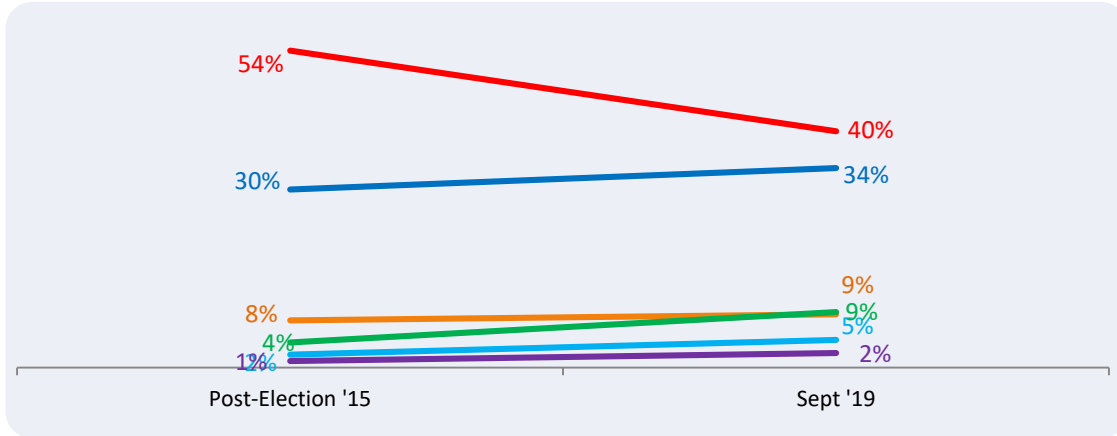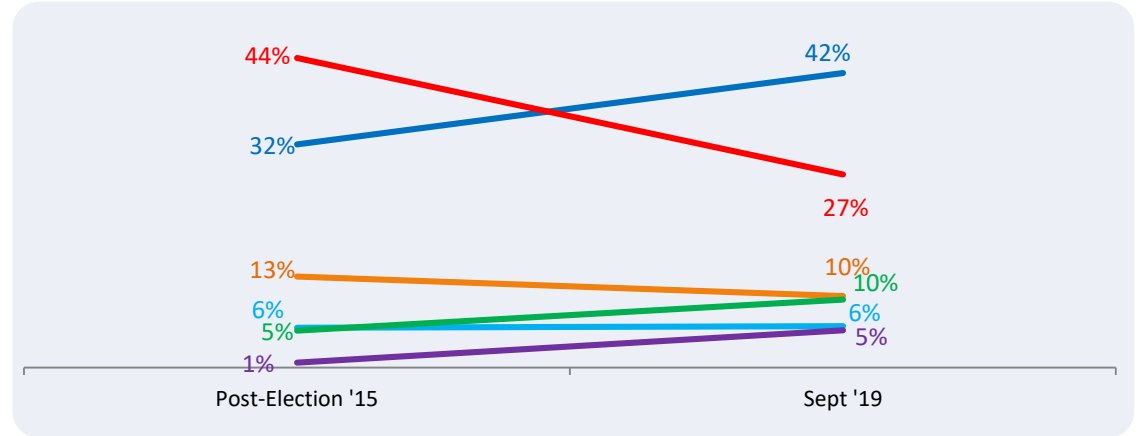- Canadian Dream Strugglers 33%

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Federal Vote by Gap Segments: While the Liberals led among Strugglers in 2015, the Conservatives now have a strong lead

Canadian Dream Achievers
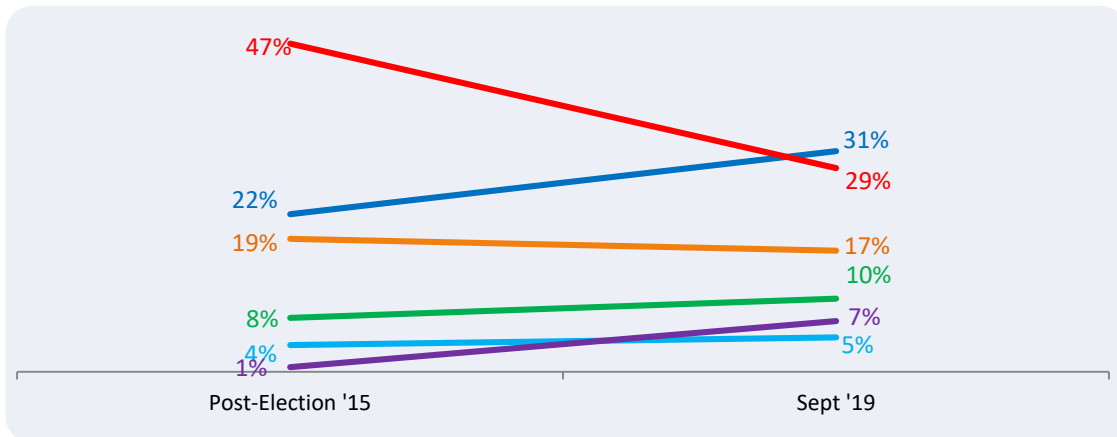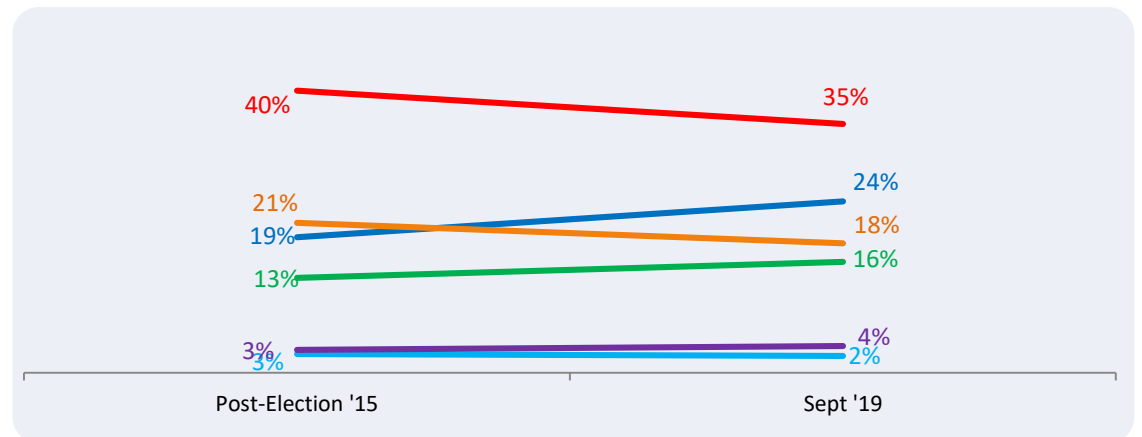

- 54% → 40% (Liberal)
- 30% → 34% (Conservative)
- 8% → 9% (NDP)
- 4% → 9% (Green)
- 1% → 5% (Bloc)
- 1% → 2% (PPC/Other)

Post-Election '15 — Sept '19

Canadian Dream Strugglers

- 44% → 27% (Liberal)
- 32% → 42% (Conservative)
- 13% → 10% (NDP)
- 6% → 6% (Bloc)
- 5% → 10% (Green)
- 1% → 5% (PPC/Other)

Post-Election '15 — Sept '19

Ambivalent

- 47% → 29% (Liberal)
- 22% → 31% (Conservative)
- 19% → 17% (NDP)
- 8% → 10% (Green)
- 4% → 5% (Bloc)
- 1% → 7% (PPC/Other)

Post-Election '15 — Sept '19

Alienated

- 40% → 35% (Liberal)
- 21% → 18% (NDP)
- 19% → 24% (Conservative)
- 13% → 16% (Green)
- 3% → 4% (PPC/Other)
- 3% → 2% (Bloc)

Post-Election '15 — Sept '19

Decided vote: **Liberal** **Conservative** **NDP** **Green** **Bloc** **PPC/Other**

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