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THE EVOLUTION OF CANADIAN VALUES:  
A GROWING SOCIAL DIVIDE

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*THE PANORAMA PROGRAM*

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Presented to Louis Audet, Sept. 20th 2018

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# A numerical overview of the trend towards social division in Canada in 2018

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# 1. A menacing world

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## A menacing world

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For a growing part of the population, there is a perception that the world is changing...for the worse



Loss of control

Failing grasp

Fear of exclusion

Loss in confidence

Reflex of “protecting oneself and one’s belongings”,  
regardless of the impact on society

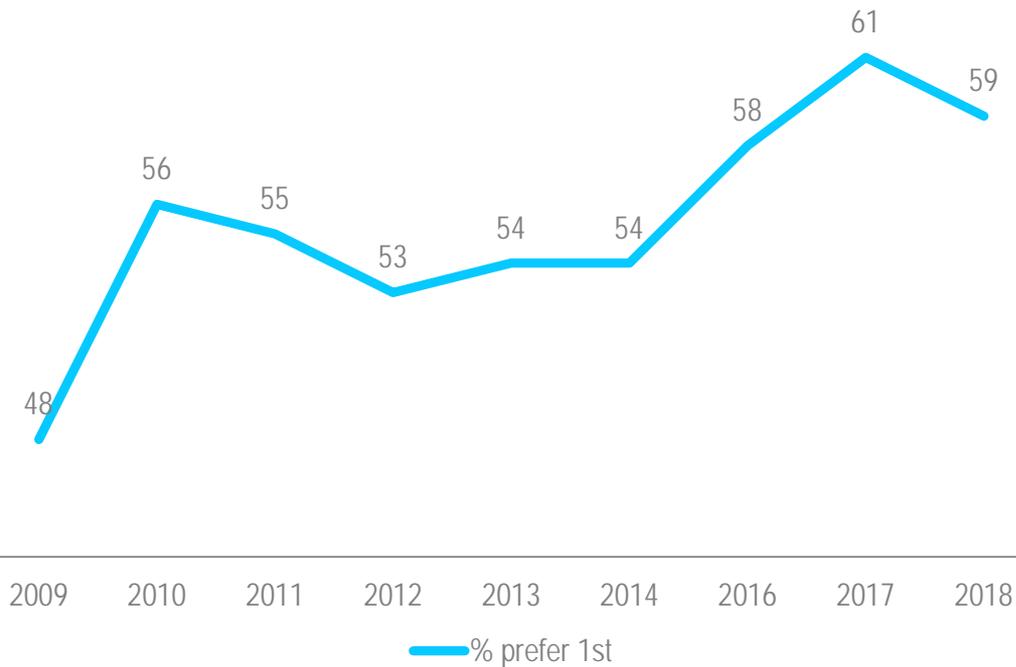
Neo-conservatism



# Apocalyptic anxiety

## Canada, 2009-2018

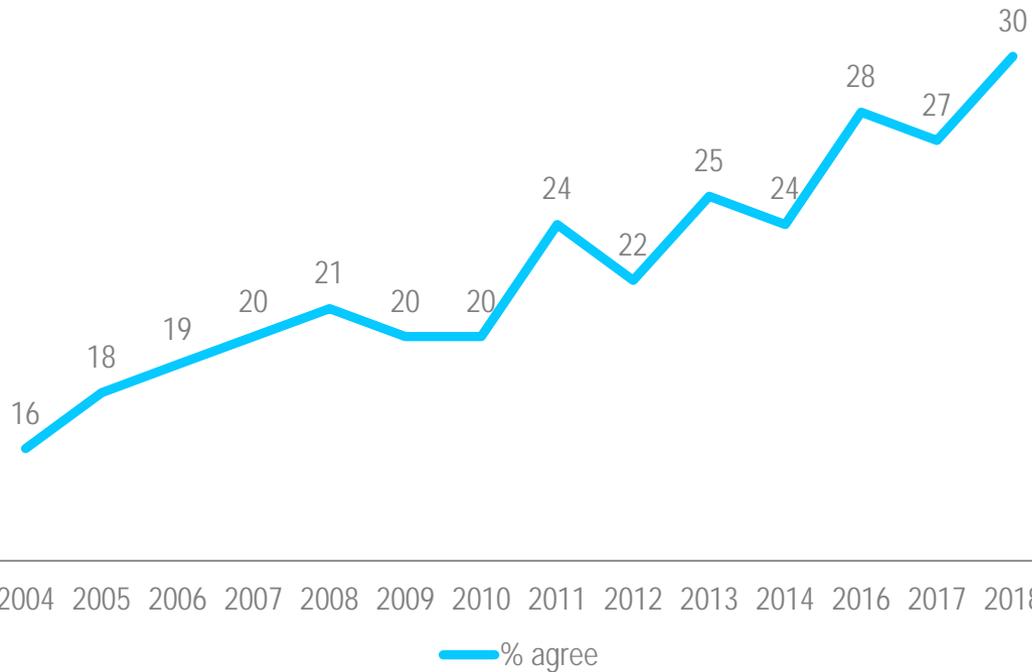
Q163. Which one of these two opinions corresponds to the way you think: the world is heading for disaster: within the next 10 or 20 years there will be a major upheaval OR the world is evolving moving forward: within the next 10 or 20 years we will see the establishment of a more humane and happier society.



# Aimlessness

Canada, 2004-2018

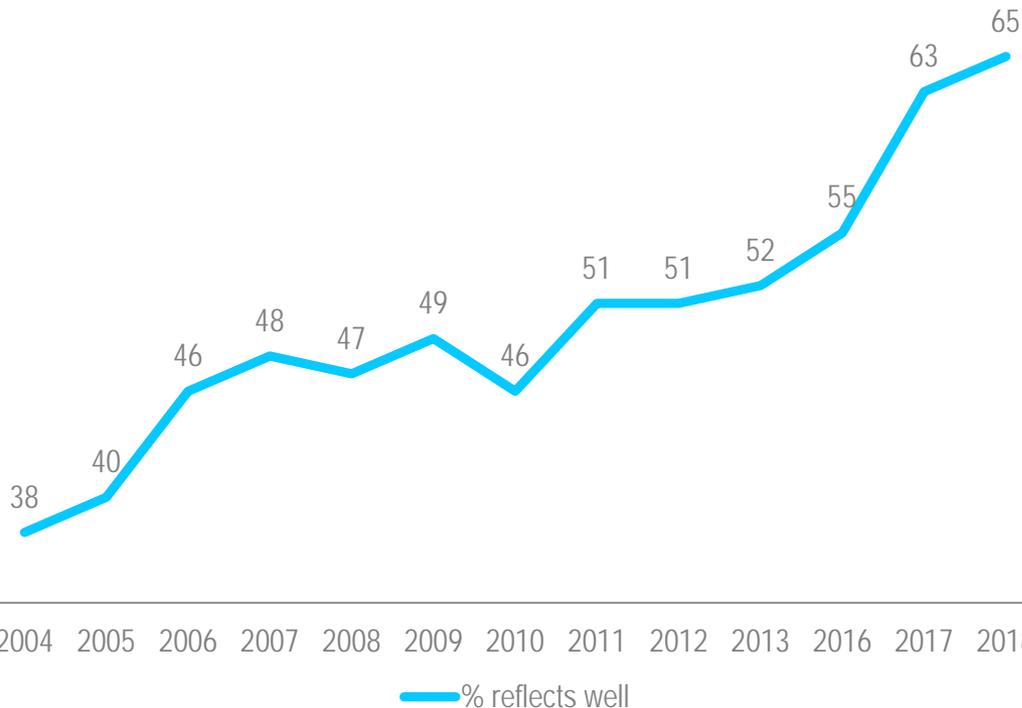
Q119. Generally speaking, I feel that I don't really have any goals in life.



# Cynicism

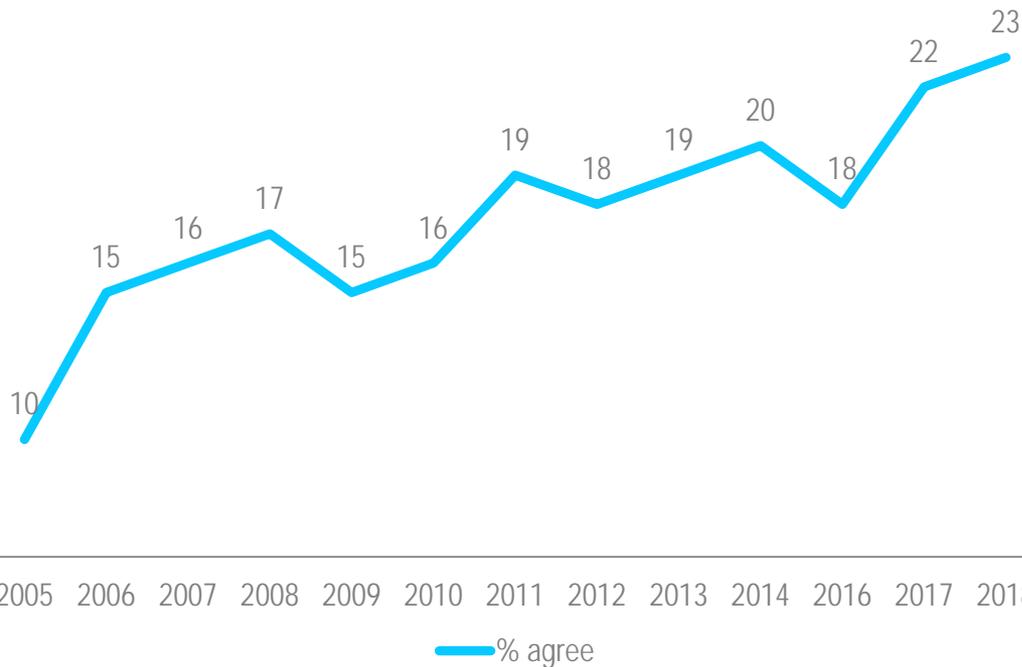
## Canada, 2004-2018

Q185. When I think of politics, business, the scientific field or the media, I can no longer believe anyone, they all have something to sell us.



## Primacy of environmental protection Canada, 2005-2018

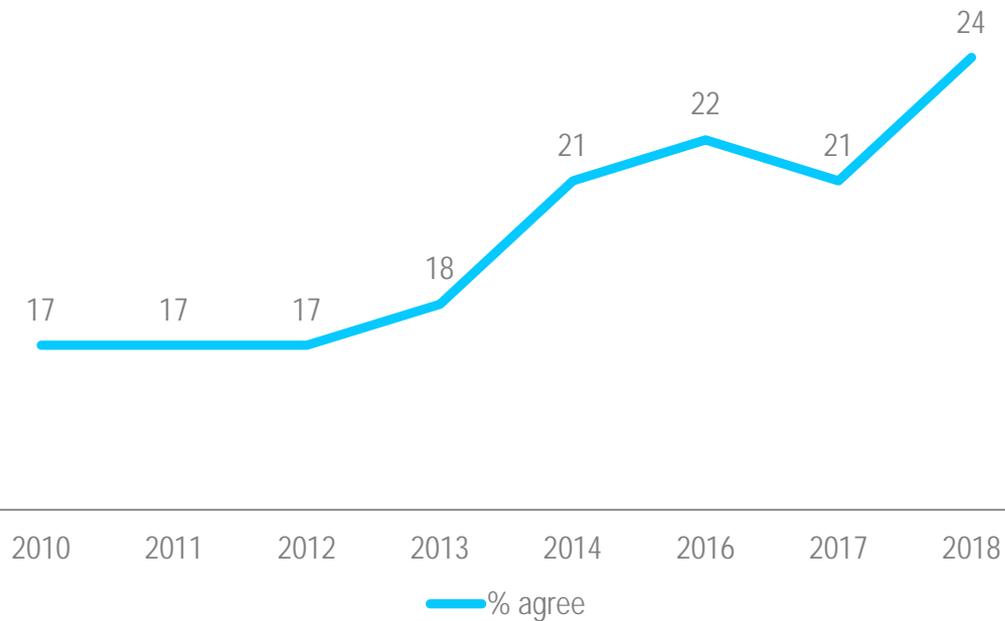
Q47. To preserve people's jobs in this country, we must accept higher degrees of pollution in the future.



## Civil disobedience

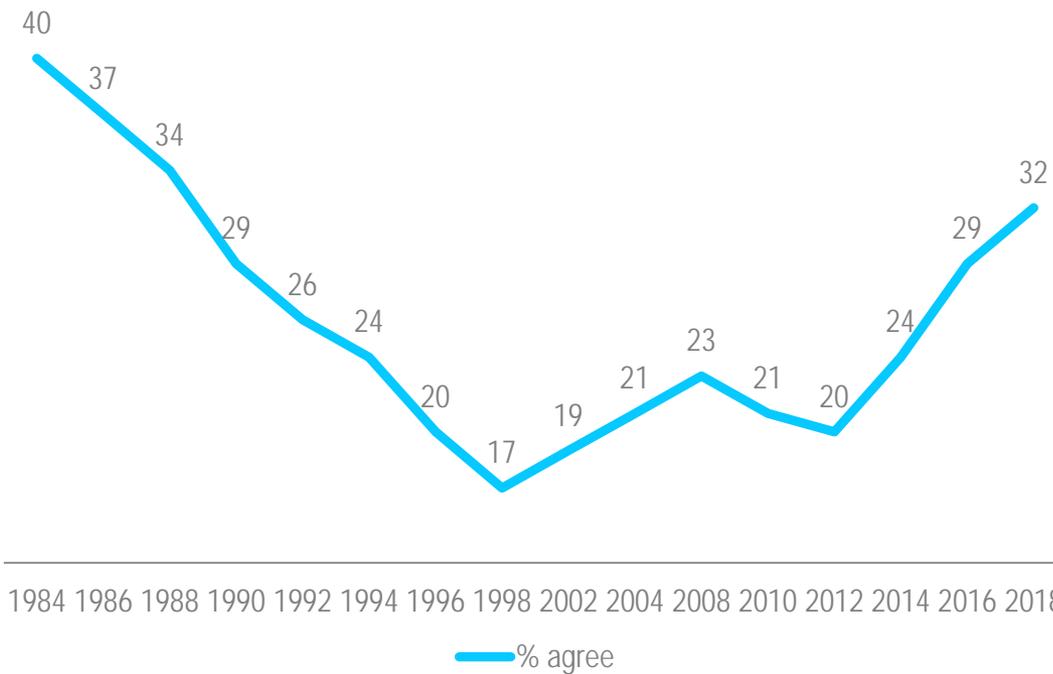
### Canada, 2010-2018

Q130. When you think a law is stupid, it's OK not to obey it.



## Patriarchal authority Canada, 1984-2018

LL2. The father of the family must be master in his own house.



## 2. A stimulating world

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## A stimulating world

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Simultaneously, for another part of the population, there is a perception that the world is changing BUT that this change is the **source of opportunities**



Capacity to adapt

Social diversity seen as a source of richness

Newness and modernity seen as sources of progress

Perception that in opening up to others, in helping one another, in valuing all points of view, we create a better world



## Adaptability

### Canada, 2006-2018

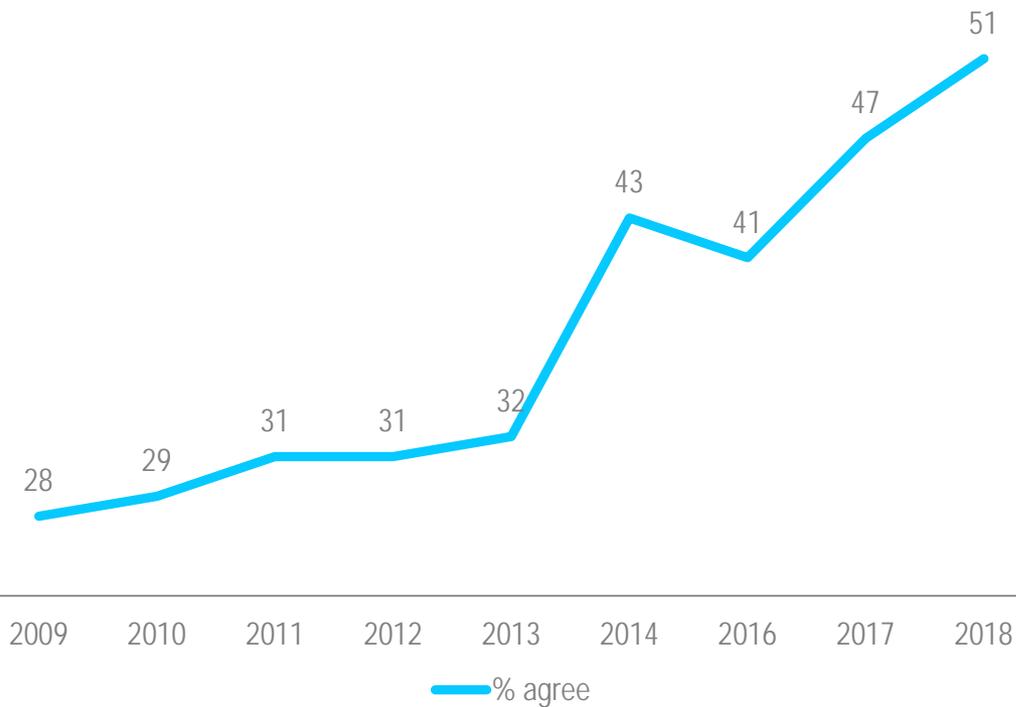
Q181. I do not feel uncomfortable living with the uncertainties and the unexpected in life today.



## Pursuit of novelty

### Canada, 2009-2018

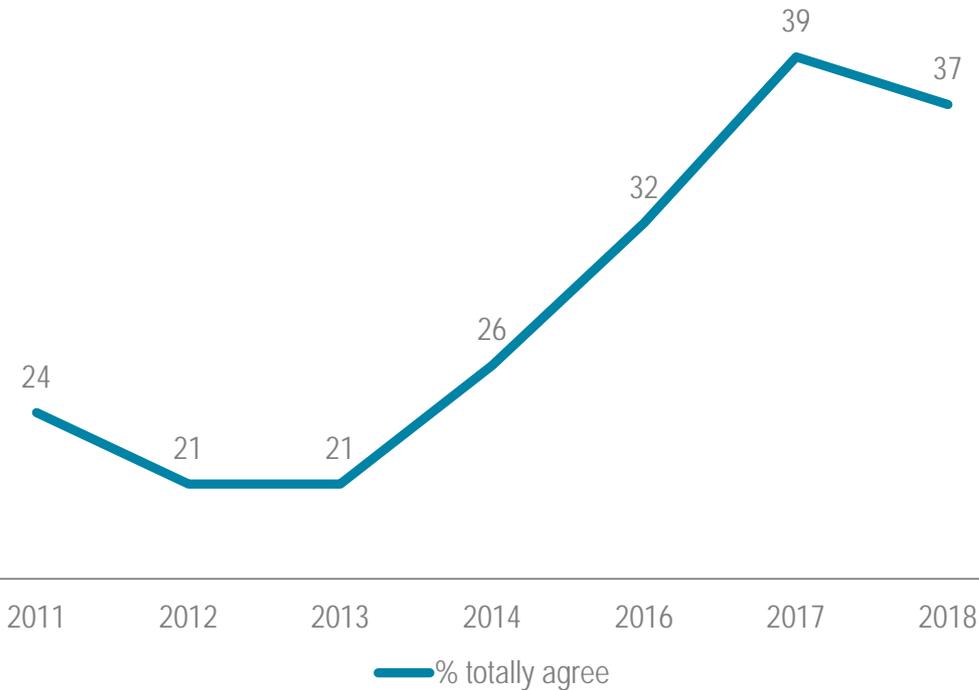
Q59. I like to be immediately informed of new products and services so that I can use them.



## Cultural fusion

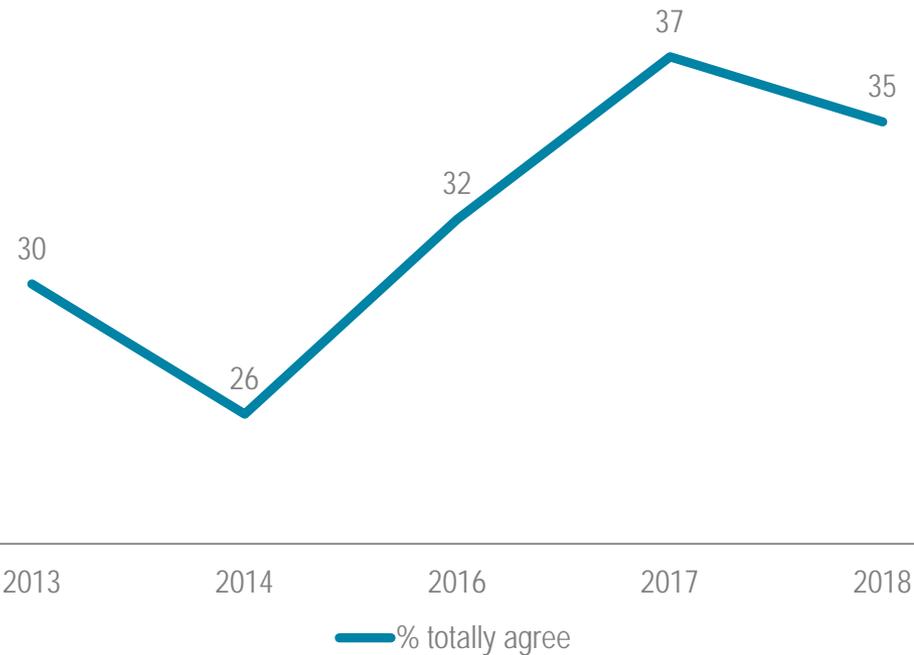
### Canada, 2011-2018

Q5. Other cultures have a lot to teach us; contact with them is enriching for us.



## Social learning Canada, 2013-2018

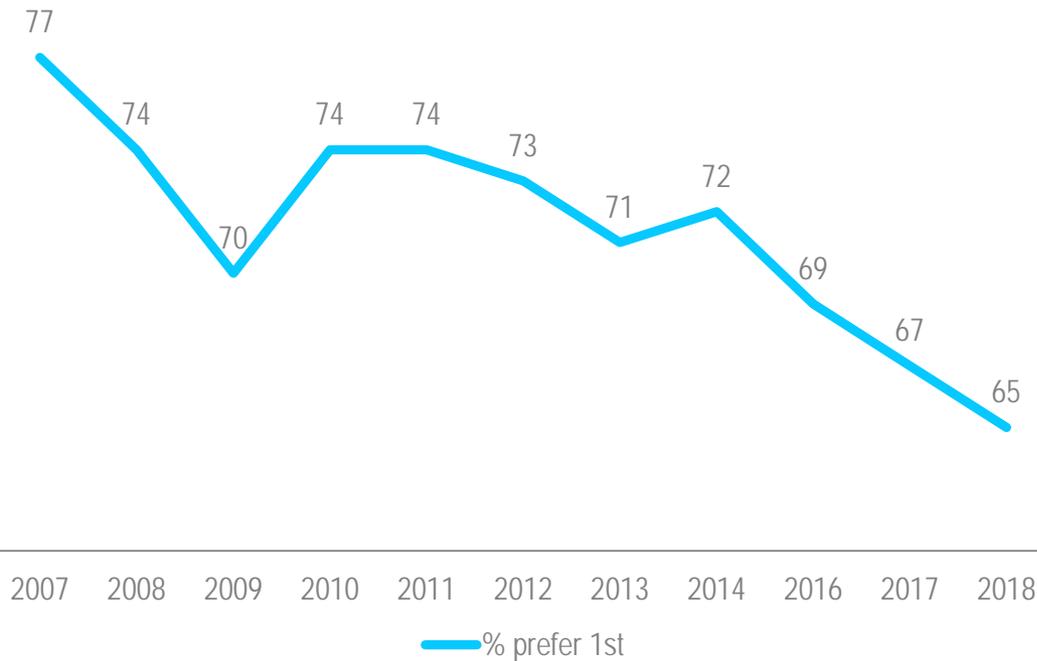
Q18. I learn a great deal from meeting people who are different from me.



## Rejection of authority

Canada, 2007-2018

Q161. I think: that young people should be taught to obey authority OR that young people should be taught to question authority.





# Synthesis of this social division phenomenon

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## Synthesis of this social division phenomenon

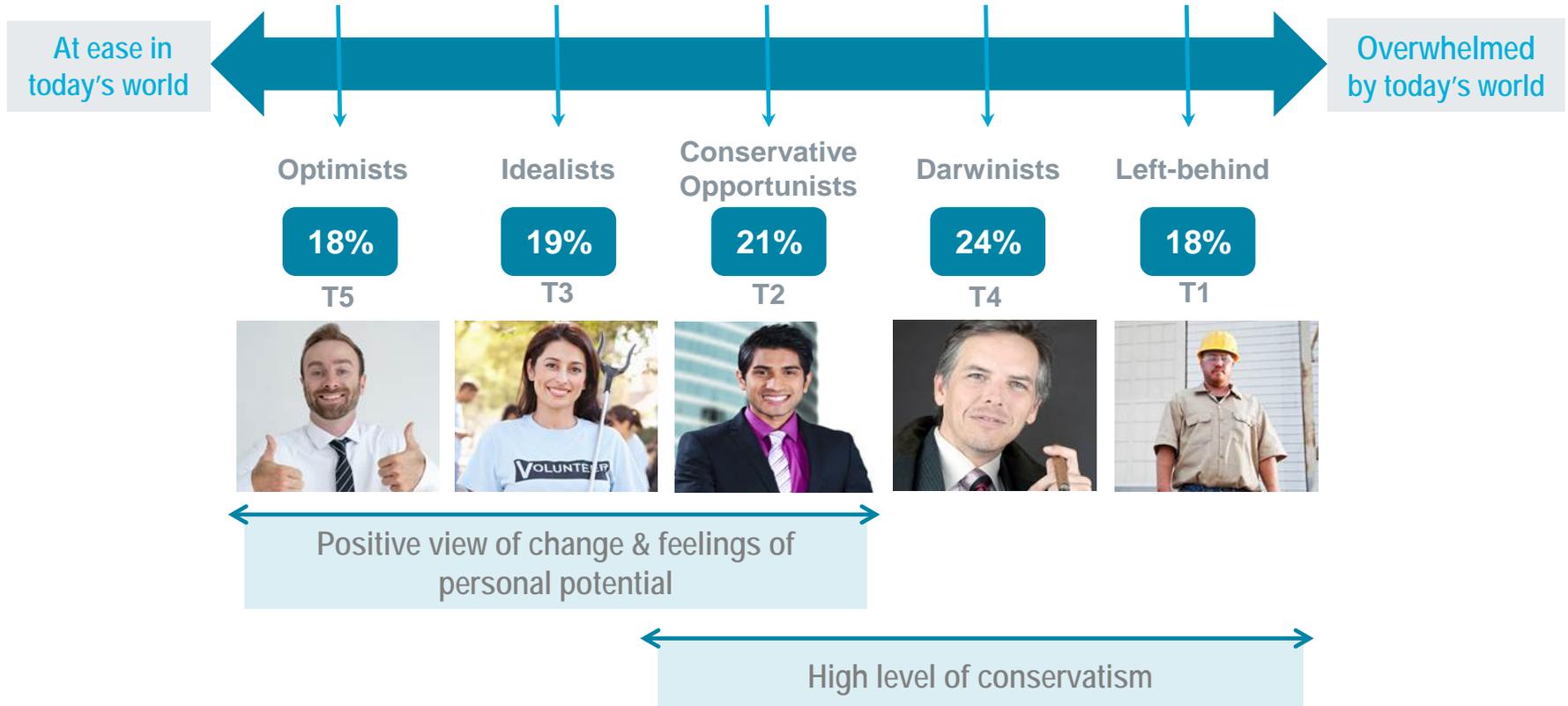
To synthesize this phenomenon and segment the population based on where people sit along an axis of feeling of well-being and adaptation to the realities of the world today, we have selected all the Panorama questions that are likely to capture discomfort or ease with these realities. These have been included in a factor analysis (PCA) followed by a population segmentation exercise. Three factors and five segments emerged from this analysis.

The three major axes (factors) that underlie this social division phenomenon are:

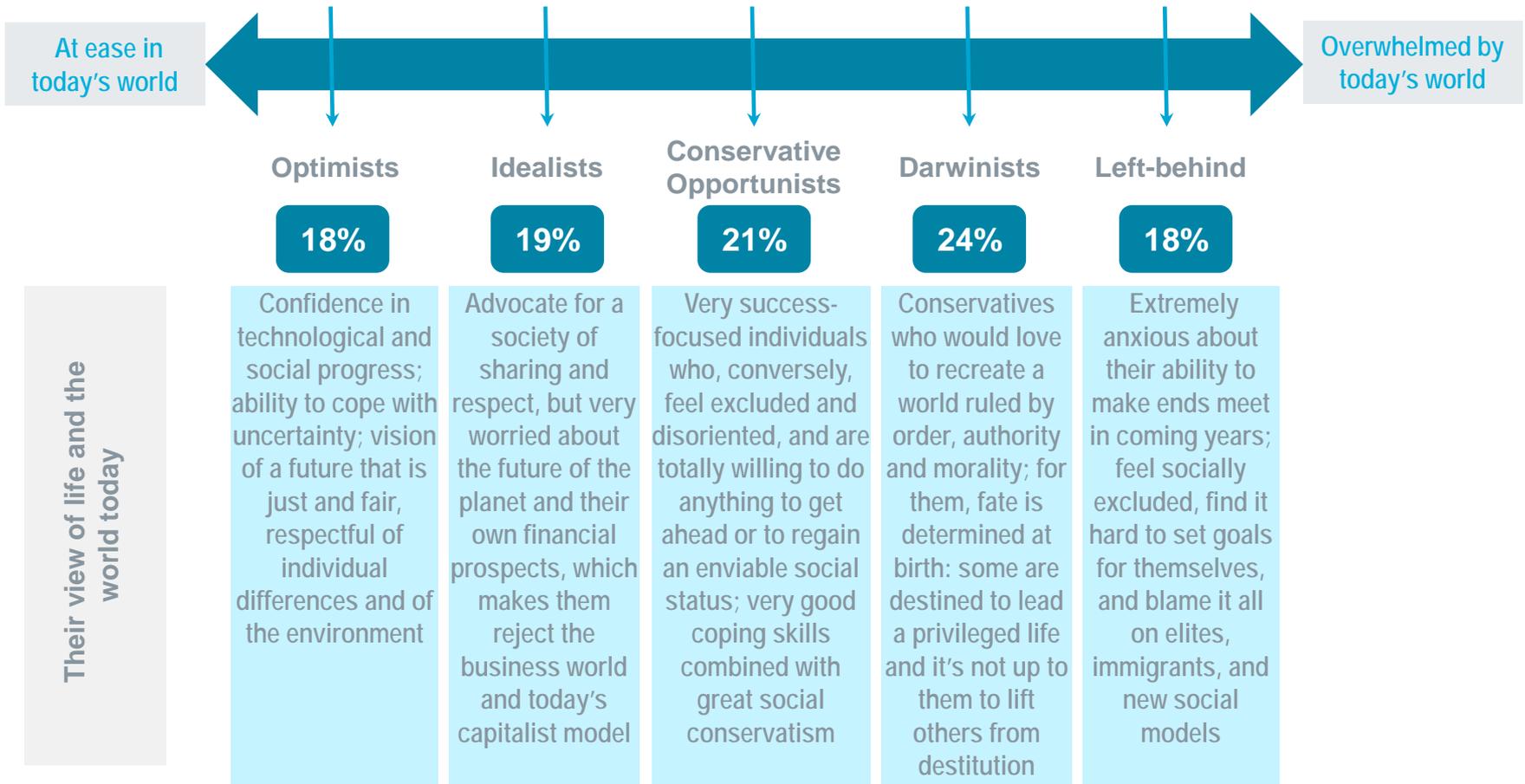


# The social division phenomenon in a nutshell

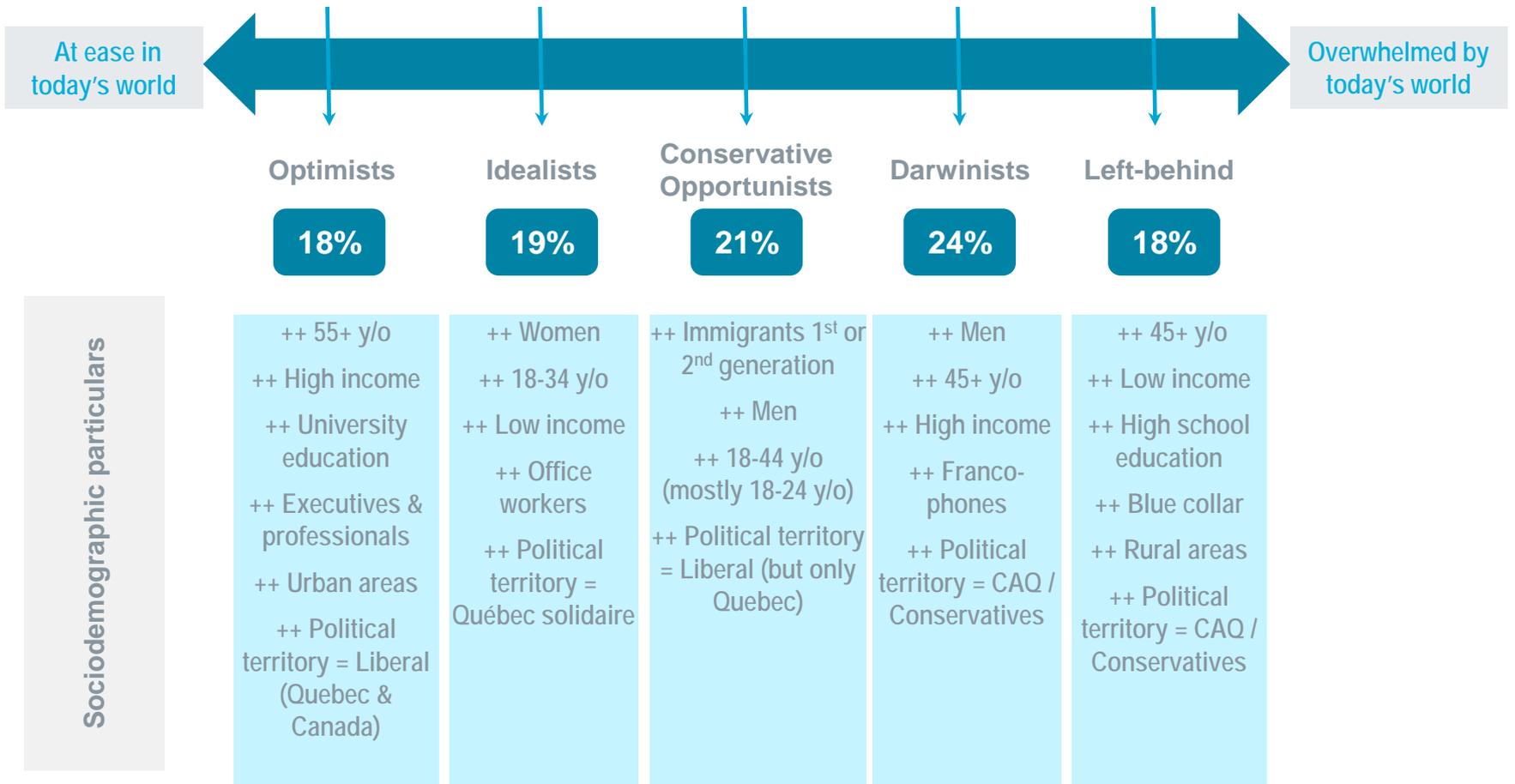
Five segments are distributed along the following axis creating a synthesis of the three preceding factors



# Description of the segments



# Description of the segments



## Description of the segments

	Optimists 18%	Idealists 19%	Conservative Opportunists 21%	Darwinists 24%	Left-behind 18%
Embrace change	+++	++	+ / -	+ / -	---
Confidence in the future	+++	--	++	+	---
Control over one's life	+++	+ / -	--	+	---
Feeling of social connectivity	+++	Average rate	---	++	---
Openness to social diversity	++	+++	--	---	---
Openness to immigration	+++	+++	--	--	---
Social responsibility	+++	++	+	--	---

## Responses, by segment, to the questions that illustrate this social division phenomenon

### Feeling of being overwhelmed by change and loss of confidence in the future

% total agreement with the statement	TOTAL	Optimists	Idealists	Conservative Opportunists	Darwinists	Left-behind
	n= 6,439	1,210	1,262	1,275	1,557	1,135
I think that <u>the world is heading for disaster</u> : within the next 10 to 20 years there will be a major upheaval	59%	33%	73%	61%	47%	87%
<u>Change is part of the problem</u> . It's very hard to keep up with	51%	17%	40%	75%	46%	69%
I really believe that the way we consume and live is <u>leading to the complete destruction of the planet</u>	75%	64%	93%	89%	48%	84%
I am very concerned that I <u>will not have enough money</u> to live comfortably in the future	67%	40%	83%	80%	47%	84%
I am excited by the <u>possibilities</u> presented by the <u>new technologies</u> (% totally agree)	26%	48%	31%	36%	14%	5%
I do not feel uncomfortable living with the uncertainties and the unexpected in life today	49%	58%	42%	71%	42%	29%

Reversed statements

## Responses, by segment, to the questions that illustrate this social division phenomenon

### Cont'd: focus on loss of confidence in the future

Looking at your personal future in the coming years, do you think it will...	TOTAL	Optimists	Idealists	Conservative Opportunists	Darwinists	Left-behind
n=	2,347	479	445	417	581	425
...improve	37%	52%	34%	44%	34%	22%
...stay the same	49%	43%	45%	44%	59%	51%
...get worse?	14%	5%	22%	12%	8%	27%

Which of the following statements best corresponds to your own view of the future?	TOTAL	Optimists	Idealists	Conservative Opportunists	Darwinists	Left-behind
n=	2,347	479	445	417	581	425
I expect there will be lots of opportunities for me to succeed in the future	20%	29%	14%	28%	22%	9%
I think things may be difficult at times in the future but I am hopeful that I will find success	49%	51%	55%	50%	48%	43%
I don't think there is much hope for me to be successful in the future	11%	3%	14%	11%	7%	21%
None of these statements fits my own view	19%	18%	17%	11%	22%	27%

## Responses, by segment, to the questions that illustrate this social division phenomenon

### Feeling of loss of control over one's life, disorientation and exclusion

% total agreement with the statement	TOTAL	Optimists	Idealists	Conservative Opportunists	Darwinists	Left-behind
n=	6,439	1,210	1,262	1,275	1,557	1,135
No matter what I do, <u>I have a lot of trouble changing the course of events that affect me</u>	52%	16%	56%	82%	37%	70%
Generally speaking, I feel that <u>I don't really have any goals in life</u>	30%	5%	31%	52%	13%	48%
<u>I don't really feel in touch</u> with what's happening in society	42%	13%	42%	64%	26%	64%

# Responses, by segment, to the questions that illustrate this social division phenomenon

## Loss of confidence in the elite and a feeling that it's "every man to himself"

% total agreement with the statement	TOTAL	Optimists	Idealists	Conservative Opportunists	Darwinists	Left-behind
n=	6,439	1,210	1,262	1,275	1,557	1,135
Que je pense à la politique, aux affaires, When I think of politics, business, the scientific field or the media, <u>I can no longer believe anyone</u> ; they all have something to sell us.	65%	40%	66%	84%	54%	80%
To preserve people's jobs in this country, <u>we must accept higher degrees of pollution</u> in the future	23%	12%	6%	55%	23%	15%
When you <u>think a law is stupid</u> , it's <u>OK not to obey it</u>	23%	16%	20%	47%	15%	18%
I feel that I have <u>enough trouble taking care of myself</u> without worrying about the needs of the poor	34%	13%	22%	27%	41%	60%
<u>Big businesses</u> generally try to strike a <u>fair balance between profits and the public interest</u>	40%	43%	18%	74%	43%	21%

Reversed statement

## Responses, by segment, to the questions that illustrate this social division phenomenon

### Social conservatism (authoritarianism, being closed to immigration and to new social models)

% total agreement with the statement	TOTAL	Optimists	Idealists	Conservative Opportunists	Darwinists	Left-behind
	n= 6,439	1,210	1,262	1,275	1,557	1,135
The <u>father of the family must be master</u> in his own house	32%	17%	5%	68%	36%	28%
I think that young people should be taught <u>to obey authority</u>	65%	55%	39%	69%	81%	75%
Whatever people say, <u>men have a certain natural superiority over women</u> , and nothing can change this	28%	12%	7%	65%	28%	23%
<u>Getting married and having children</u> is the only real way of having a family	35%	21%	9%	62%	44%	30%
Overall, there is <u>too much immigration</u> . <u>It threatens the purity of the country</u>	42%	13%	14%	63%	48%	66%
I think <u>there will always be people in society who will be hungry</u> and homeless; it may be regrettable, but <u>it's a fact of life</u>	46%	34%	19%	51%	65%	54%

The image features three men in business suits standing in a row against a dark background with a grid pattern. The man on the left has his hands covering his eyes, the man in the middle has his hands covering his ears, and the man on the right has his hand covering his mouth. The entire scene is bathed in a blue light.

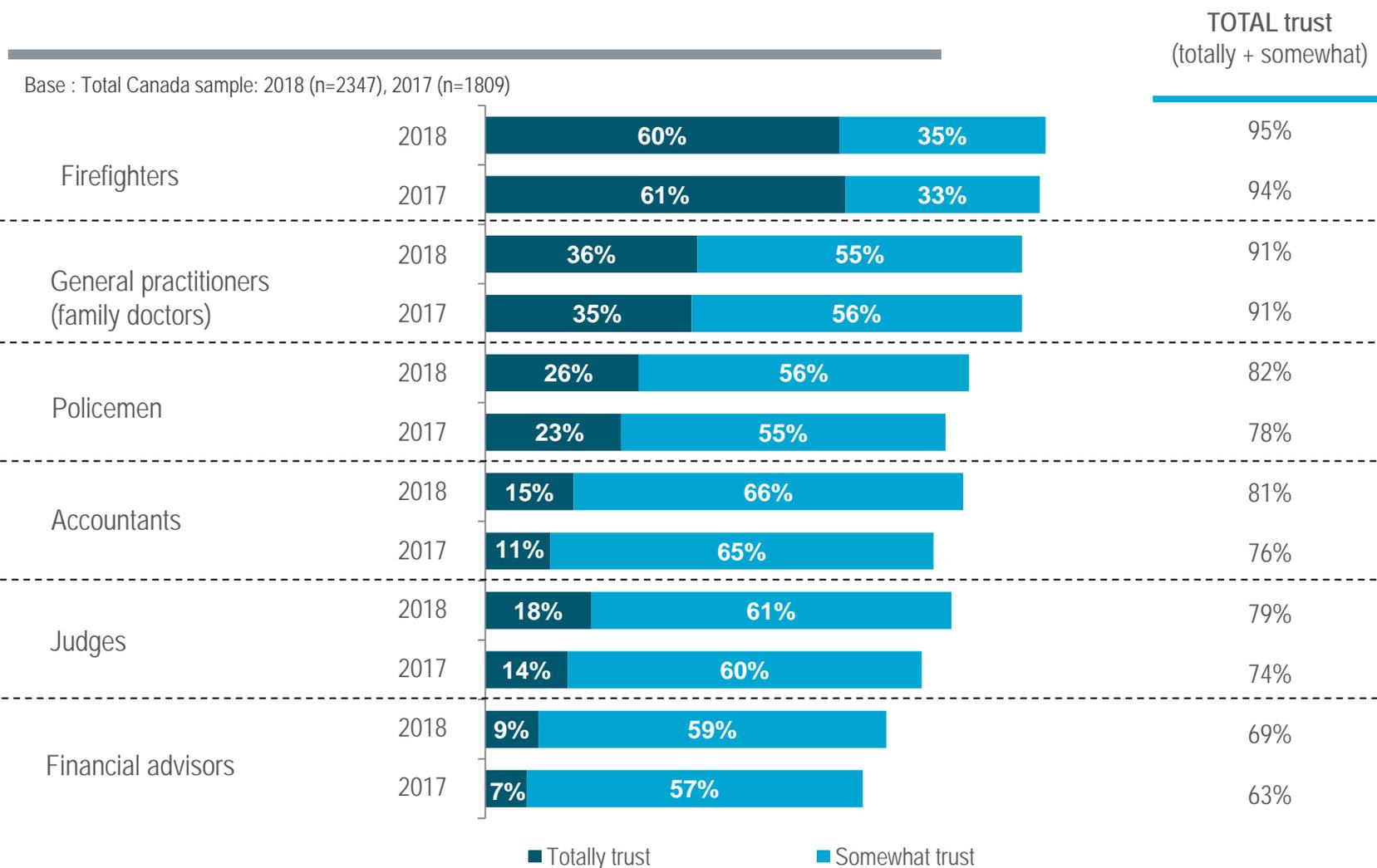
# Confidence in various professions and in political and business leaders

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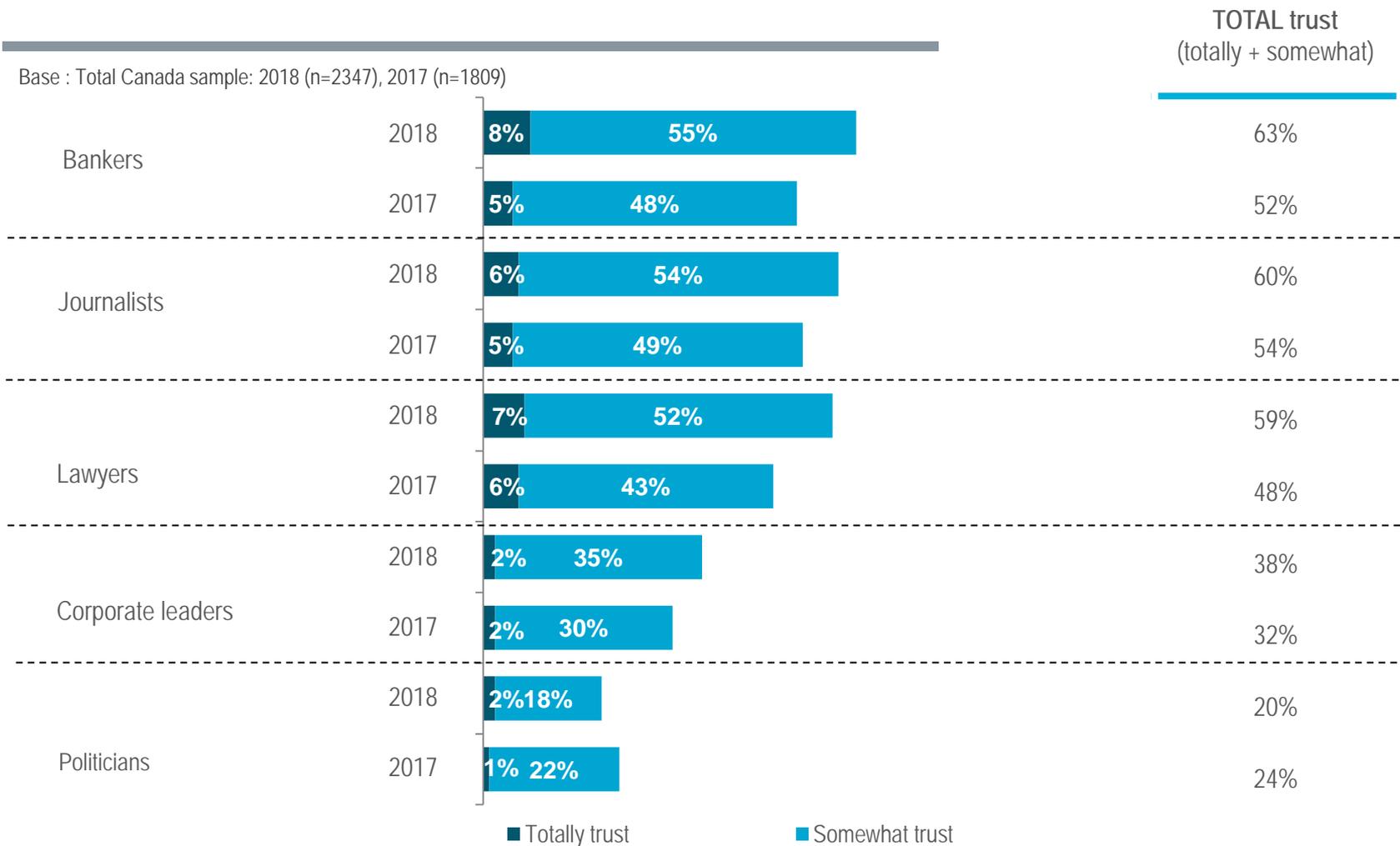
## Trust in various professions



R4. Generally speaking, to what extent do you trust the following professionals? Would you say that you trust them totally, somewhat, not much, or not at all?

## Trust in various professions

Base : Total Canada sample: 2018 (n=2347), 2017 (n=1809)



R4. Generally speaking, to what extent do you trust the following professionals? Would you say that you trust them totally, somewhat, not much, or not at all?

## Trust in various professions

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For several years, firefighters and doctors have come out ahead, while corporate leaders and politicians are placed by Canadians at the bottom of the trust spectrum.

The very low percentage of people who respond “totally trust” when it comes to the legal, financial, media, business or political spheres indicates there is a crisis of confidence in many of our traditional institutions: we see a constant rise in cynicism among the population, fueled by this threatening view of today’s life and a perception that these same institutions are causing it, at least partly, or else doing nothing to alleviate it and help us.

However, something new arose this year in the way Canadians trust these professionals: now, they group two kinds of professionals in their perceptions:

**The traditional elite** who seem to work in their own interests

and **the public servants** who really are there for us, to help, contribute and “serve” the people



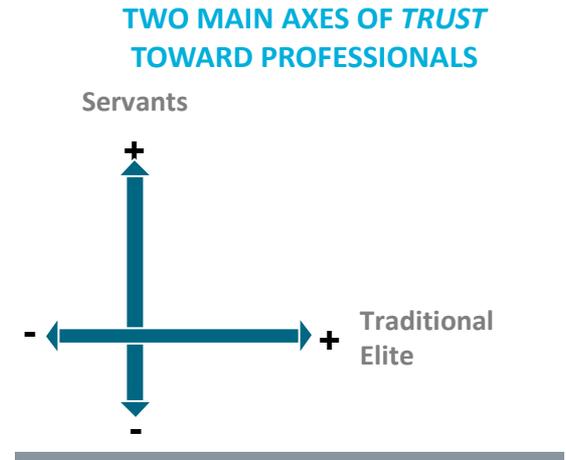
## Key factors driving *trust*

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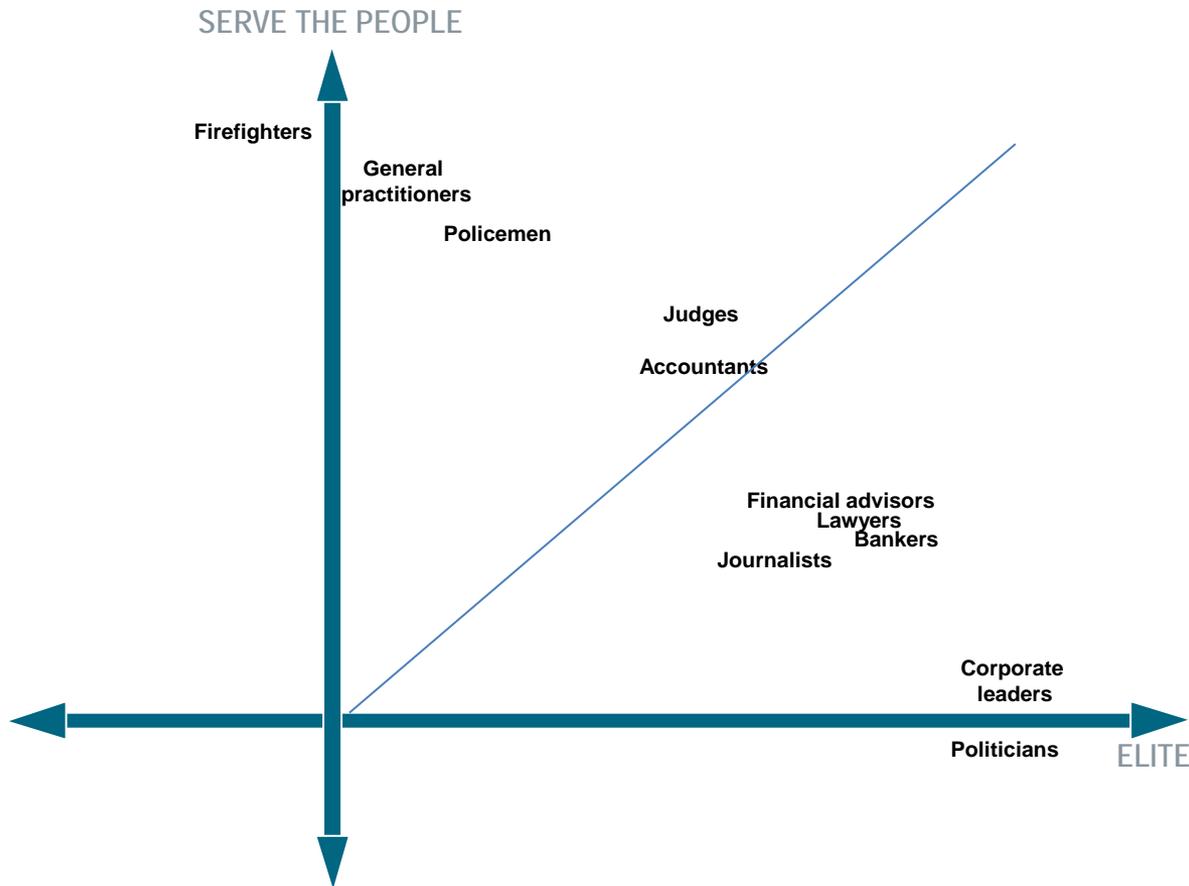
Technically, we saw two factors emerging that explain people's attitudes, while in the past only one determinant existed (trust and don't trust).

It means that even though the numbers have not moved, perceptions toward professionals are really becoming more layered in the minds of Canadians, distinguishing those who do something for "us" and those who don't.

This makes it possible to create a map with the 2 axes and plug the various professionals on it as illustrated on the next page.



# Trust in various professionals according to two major distinguishing axes



From firefighters who are the ultimate servants and not “elitist” at all, to politicians who represent the quintessential traditional elite and are perceived as not being in it to contribute to society!

Business leaders are positioned very close to politicians in this portrait, associated with being people who operate based on their own interests without consideration for the interests of the public or society in general.

## Trust in professionals based on segment

% <i>Totally</i> trust	TOTAL	Optimists	Idealists	Conservative Opportunists	Darwinists	Left-behind
	n= 2,347	479	445	417	581	425
Fire-fighters	60%	73%	68%	49%	57%	55%
General practitioners	36%	49%	37%	33%	33%	31%
Policemen	26%	37%	21%	24%	26%	21%
Accountants	15%	21%	13%	19%	13%	8%
Judges	18%	30%	11%	19%	20%	11%
Financial advisors	9%	13%	6%	15%	7%	5%
Bankers	8%	11%	4%	14%	9%	3%
Journalists	6%	10%	7%	8%	3%	3%
Lawyers	7%	9%	3%	13%	5%	3%
Corporate leaders	2%	2%	1%	5%	2%	0%
Politicians	2%	3%	0%	5%	1%	0%

## Trust in professionals based on segment

% <i>Totally + Somewhat</i> trust	TOTAL	Optimists	Idealists	Conservative Opportunists	Darwinists	Left-behind
	n= 2,347	479	445	417	581	425
Fire-fighters	95%	98%	97%	94%	95%	92%
General practitioners	91%	97%	91%	88%	93%	87%
Policemen	82%	93%	79%	76%	85%	77%
Accountants	81%	92%	80%	80%	79%	74%
Judges	79%	89%	79%	77%	79%	71%
Financial advisors	69%	79%	65%	69%	69%	61%
Bankers	63%	74%	52%	67%	65%	57%
Journalists	60%	72%	66%	57%	56%	50%
Lawyers	59%	71%	52%	65%	58%	47%
Corporate leaders	38%	47%	18%	51%	45%	25%
Politicians	20%	27%	11%	28%	22%	12%



# Conclusion

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# Conclusion

Only a minority of the population, 18% (our Optimists segment) are perfectly at ease with and confident in:

The speed of changes that characterize the world today

AND the diversity in values and origins that comprises Canadian society today

AND what the future holds for them and their capacity to adapt to it.

All other segments of the population display at least one of the following “symptoms” to some degree:

fear about what the future holds for them and their capacity to face it

**58%**

a lack of confidence in companies, to varying degrees

**37%**

cynicism with regard to the country’s elite in general (politicians, media, heads of the largest companies)

**39%**

difficulty living in a country that is increasingly multicultural and that recognizes, accepts and protects diversity in social models and sexual identities

**63%**



## Segments

Idealists + Opportunists + Left-behind

Idealists + Left-behind

Opportunists + Left-behind

Opportunists + Darwinists + Left-behind

## Conclusion

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These difficulties and divisions, that can ultimately be vectors for exclusion, underscore the importance of Canada's current programmes aimed at ensuring a minimum of safety for the most vulnerable population groups.

While, because of its values and social history, Canada may seem relatively safe from the populist and conservative pressures visible in other Western nations, these trends cannot be ignored or taken lightly as our results show that there is fertile ground here, for these ideas that could, in time weaken our social fabric.

As is true in other western nations based in a social-democratic value system, Canada's political and economic leaders would be well advised to reflect on their role in protecting these values and to evaluate the risk of weakening this social fabric when they apply pressure aimed at reducing taxation and regulation.





# Methodology

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## The Panorama research program

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The Panorama research program is conducted via a sample of panelists and this year, it was done from February 27 to March 26, 2018.

A first questionnaire (A) of about 20 minutes long measuring the evolution in values, demographics and the use of certain technologies was administered to 6,439 respondents 18 years of age or older.

A few days later, these respondents were contacted again to answer a second questionnaire (B) dealing with specific questions from our clients, as well as certain issues of interest to us.

Because this questionnaire took 40 minutes to complete, we divided it into two 20-minute parts dealing with specific themes and randomly directed half the respondents to one or the other subgroup.

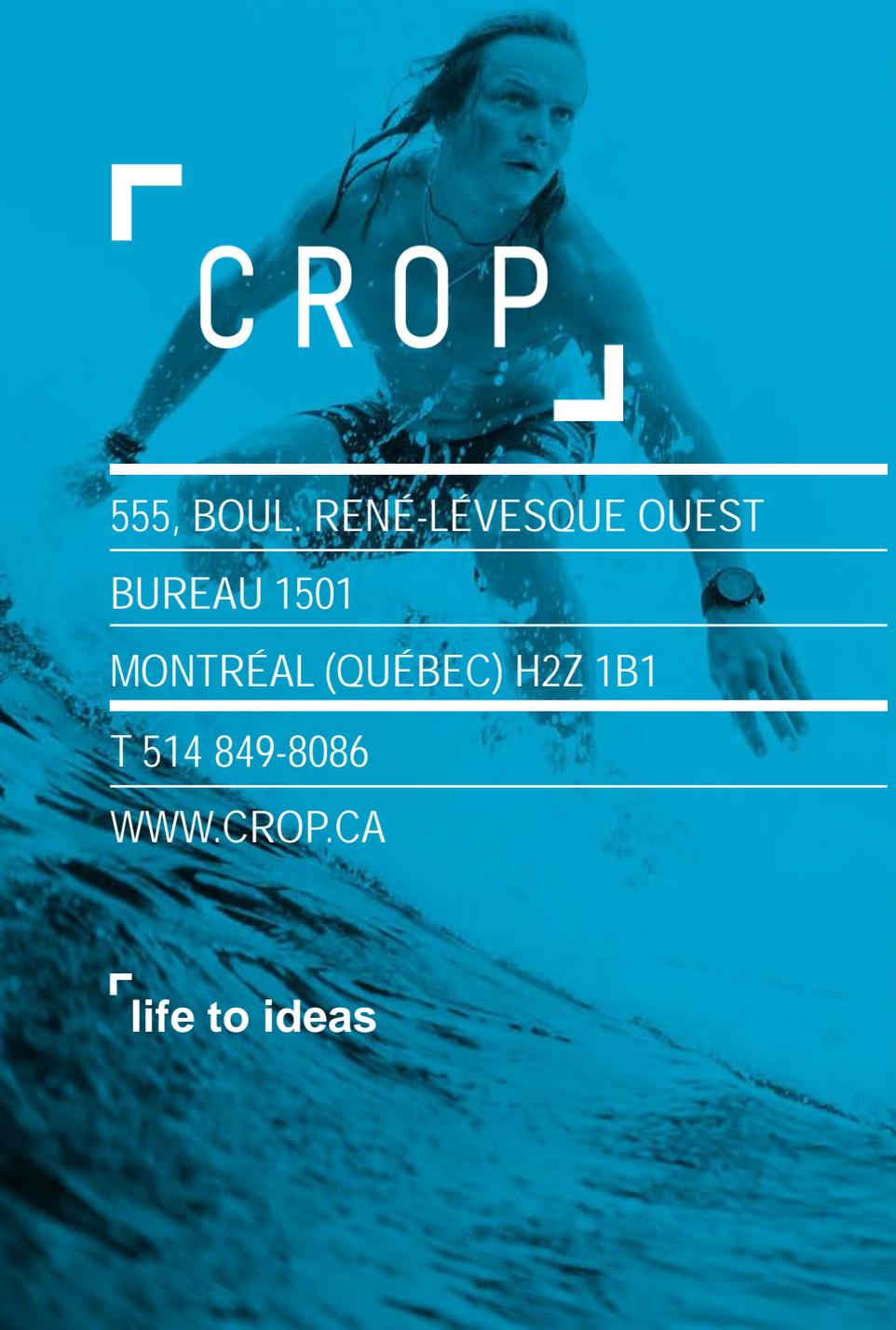
## The Panorama research program

Similar to any operation where you contact the same respondents again for a second phase of a survey, the total number of respondents for the second wave was lower than in the first wave.

Even so, more than 7 in 10 respondents completed both parts of the survey, enabling us to obtain a final sample size of over 2,300 respondents for each portion of the second wave of data collection.

The tables below present the detailed sample sizes for this operation as well as the themes covered in each part.

	A	B1	B2	A	B1	B2
<b>TOTAL</b>	<b>6,439</b>	<b>2,371</b>	<b>2,347</b>	<b>6,439</b>	<b>2,371</b>	<b>2,347</b>
Atlantic	630	221	239	Socio-demographics	Food habits	Food habits
Quebec	2,957	1,126	1,075	New product adoption and technology-related habits	Perception of large companies	Finance
Ontario	1,182	427	444	Voting intentions	Usage and perception of pharmacies	Perception of the future and impact of technology
Prairies	475	178	158	Intention of cannabis consumption	Usage of an electronics chain of stores	Travel and customer loyalty programs
Alberta	541	181	207	Values		
B.C.	654	238	224			



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