INNOVATIVE RESEARCH GROUP

Ontario Election

Online Public Opinion Research
Field Dates: Feb 19 to Feb 24, 2025
Release Date: February 25, 2025
Sponsored and Conducted by Innovative Research Group Inc.

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Survey Methodology

The findings in this survey report are based on an online survey conducted by INNOVATIVE.

WHO?

Adults (18+) in Ontario

HOW MANY?

A survey of 917 adults. The final sample is weighted to n=800 among all adults.

WHEN?

February 19th to February 24th, 2025

HOW?

Online survey using online sample from INNOVATIVE's Canada 20/20 national research panel with additional respondents from Lucid, a leading provider of online sample.

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Key Findings

1. Liberals have grown over the campaign and are well positioned to gain seats in Toronto and, to a lesser degree, in the GTA. Their gains have come from the Core Left, Left Liberals and Deferential Conservatives.

2. While Ford and the PCs continue to do well with people who identify with the PC party and with people who hold Populist Conservatives values, they have lost ground with Deferential Conservatives and Left Liberals.

3. The Liberals have done particularly well in the fight for the Doug Ford personal vote. Among the roughly one-in-five Ontario voters who like Doug Ford and don't identify as PCs, the PCs have dropped from 49% to 37% while the Liberals are up from 22% to 33%.

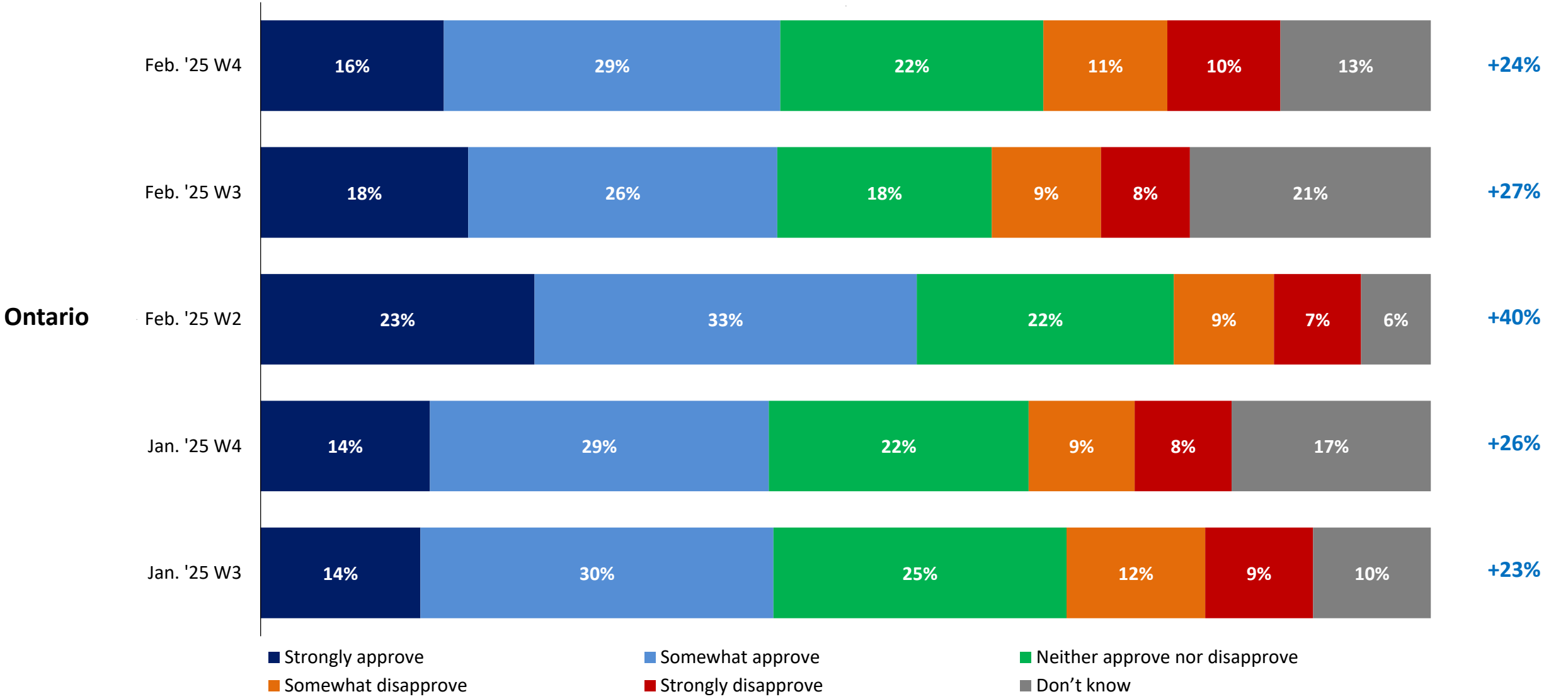
4. The NDP have not been able to get the attention of more than 20% of Ontario's voters and have lost 15% of NDP identifiers to the Liberal party.

5. While only 35% of respondents have read, seen or heard anything about the recent election debates, of those who have, nearly half (47%) felt Ford performed as well as expected while Stiles had the highest net exceeded expectation score of +5%.

Trump Reaction

Provincial Leadership Approval: Approval of the Progressive Conservative's response to Trump's presidency is stable this week

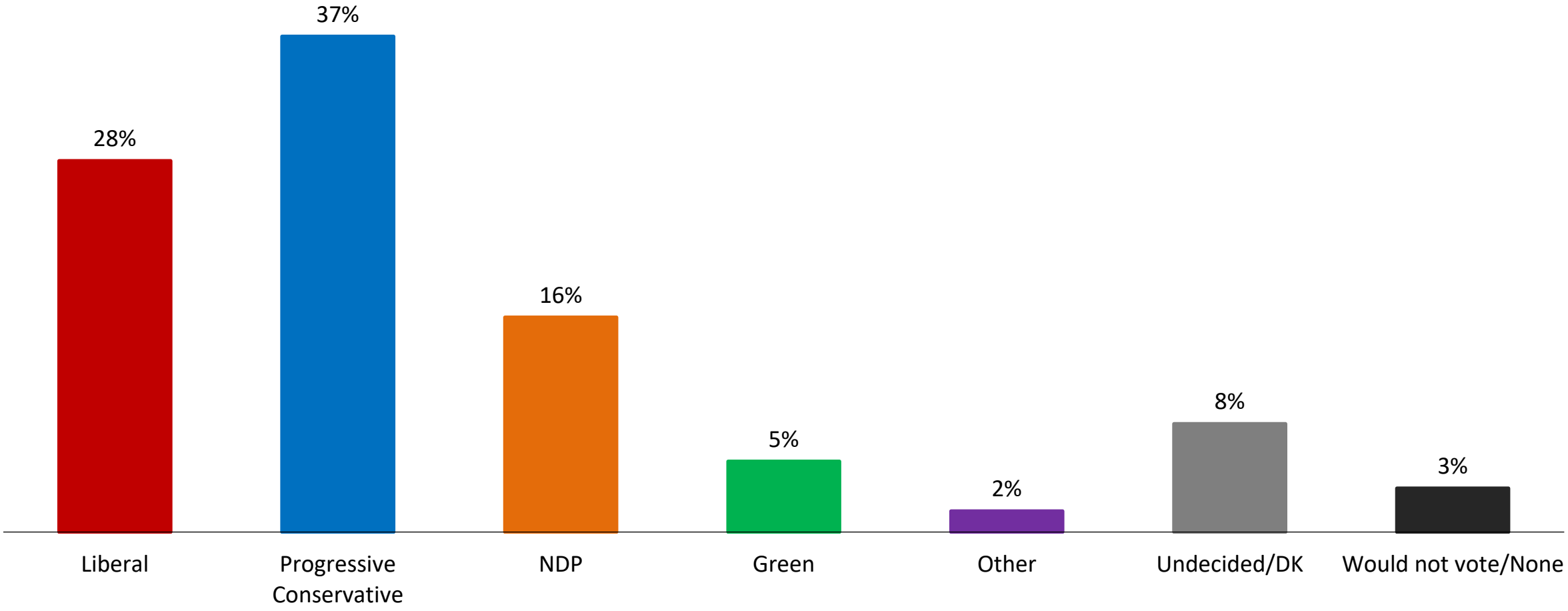
Q Do you approve or disapprove of the way the [PROV] government is responding to issues resulting from Donald Trump's Presidency?
[asked of all Ontario respondents]



Provincial Vote:
Snap Shot and Tracking

Provincial Combined Vote: Progressive Conservatives lead on combined vote at 37% with Liberals following at 28%

Q If a provincial election were held today, which party would you vote for? In that case, which party do you lean toward slightly? **[Vote + Lean]**
[asked of all respondents; n=800]



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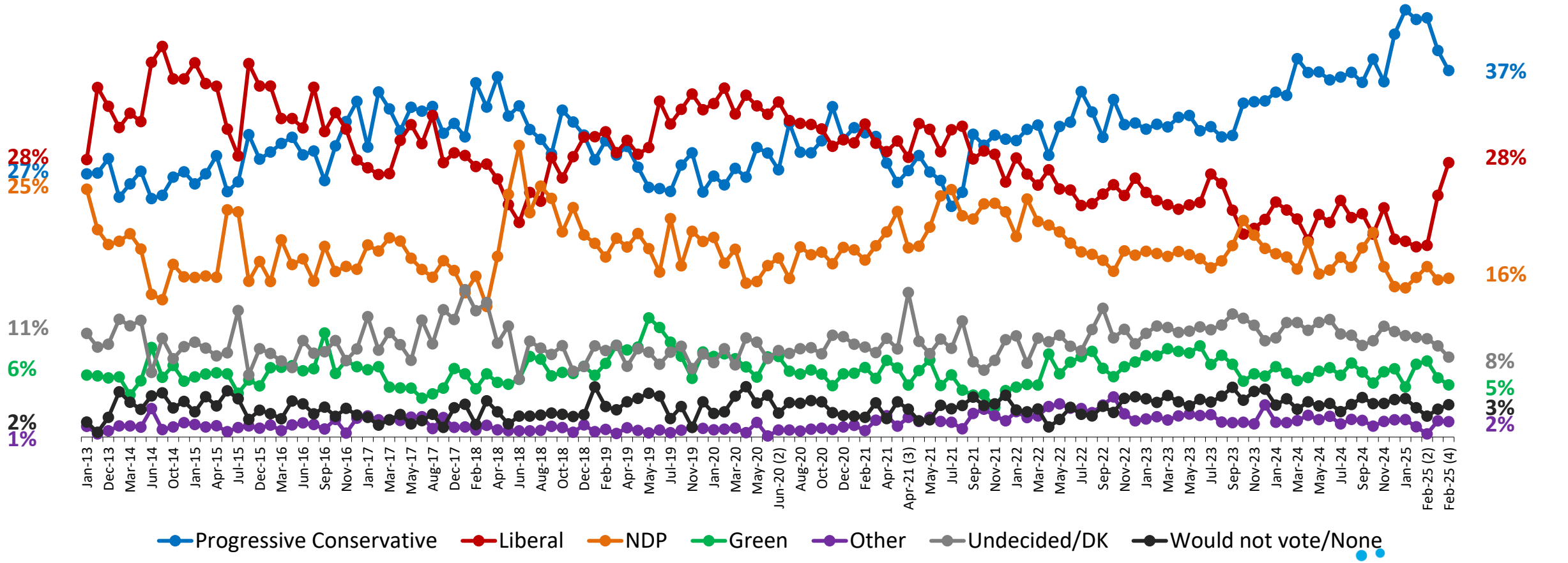
Current data: February 2025

Provincial Vote Tracking: Progressive Conservatives maintain the lead though Liberals have narrowed the gap

Q If a provincial election were held today, which party would you vote for? In that case, which party do you lean toward slightly? **[Vote + Lean]**

[asked of all respondents; n=800]



Current data: February 2025

Combined Vote by Value Cluster: Liberals lead over NDP among Core Left; 30% of Business Liberals would vote Liberals

Value Clusters

Provincial Combined Vote	Populist Conservatives (N=91)	Deferential Conservatives (N=76)	Business Liberals (N=158)	Left Liberals (N=153)	Core Left (N=142)	Pay-as-you-go Moderates (N=179)
Liberal	14%	29%	30%	33%	38%	21%
Progressive Conservative	62%	48%	41%	32%	20%	35%
NDP	9%	7%	14%	17%	26%	17%
Green	4%	7%	6%	6%	7%	3%
Other	7%	2%	1%	1%	0%	1%
Undecided/DK	3%	5%	5%	11%	6%	15%
Would not vote/None	2%	1%	4%	1%	2%	8%

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Note: Current data: February 2025

Combined Vote by Economic Gap: While PCs lead in nearly all segments; PCs and Liberals are tied among those Alienated

Economic Gap

Provincial Combined Vote	Achievers (N=145)	Strugglers (N=267)	Ambivalent (N=175)	Alienated (N=213)
Liberal	30%	28%	25%	29%
Progressive Conservative	46%	44%	30%	29%
NDP	12%	13%	19%	21%
Green	4%	5%	7%	6%
Other	1%	2%	1%	2%
Undecided/DK	6%	6%	11%	10%
Would not vote/None	0%	2%	8%	3%

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Current data: February 2025

Combined Vote by Time for Change: Over half (52%) of the 'Time for a Change' would still vote Progressive Conservatives

Time for Change

Provincial Combined Vote	Core Government (N=145)	Soft Government (N=63)	Time for a change Government (N=162)	Uncertain (N=70)	Soft anti-Government (N=188)	Hostile (N=173)
Liberal	1%	14%	23%	12%	38%	55%
Progressive Conservative	93%	69%	52%	23%	11%	0%
NDP	3%	3%	14%	11%	19%	33%
Green	1%	6%	3%	7%	11%	4%
Other	1%	1%	1%	1%	1%	3%
Undecided/DK	1%	4%	7%	29%	13%	3%
Would not vote/None	0%	3%	1%	17%	5%	1%

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Note: Current data: February 2025

Combined Vote by Party ID: Progressive Conservatives are most loyal to their party with 83% indicating they would vote their party

Provincial Party Identification

Provincial Combined Vote	Liberal (N=208)	Progressive Conservative (N=267)	NDP (N=115)	Green (N=41)	Other (N=12)	Unaligned (N=156)
Liberal	75%	5%	22%	9%	0%	16%
Progressive Conservative	13%	83%	6%	11%	27%	23%
NDP	5%	4%	66%	19%	41%	12%
Green	3%	3%	2%	51%	0%	4%
Other	0%	2%	1%	0%	23%	3%
Undecided/DK	4%	3%	3%	11%	5%	27%
Would not vote/None	0%	0%	0%	0%	5%	16%

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Note: Current data: February 2025

Combined Vote by Ford Segment: Liberals have narrowed PCs lead among Non-PC Ford supporters; Liberals lead among unaligned

Ford Segment

Provincial Combined Vote	Core PCs (n=267)	Non-PC Ford Supporters (n=145)	Unaligned (n=116)	Other Supporters (n=273)
Liberal	5%	33%	19%	52%
Progressive Conservative	83%	37%	10%	4%
NDP	4%	13%	15%	30%
Green	3%	6%	5%	8%
Other	2%	1%	3%	1%
Undecided/DK	3%	9%	29%	4%
Would not vote/None	<1%	1%	20%	<1%

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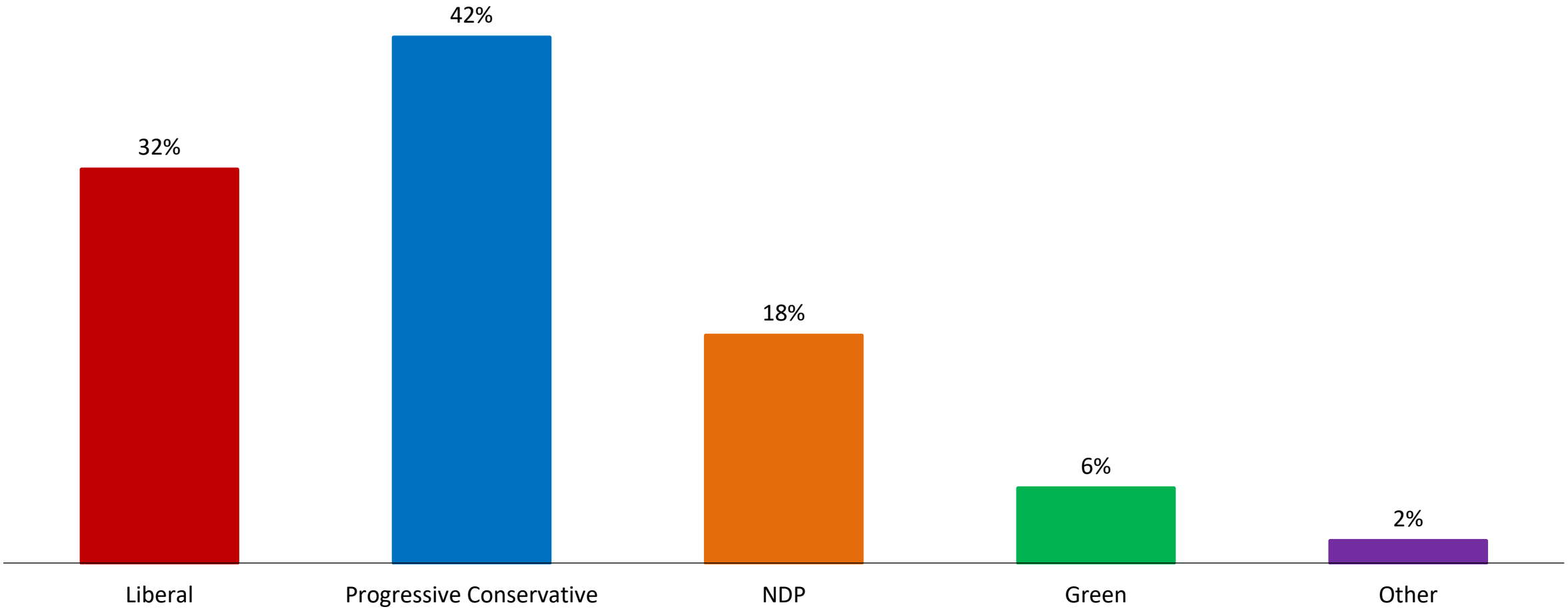
Current data: February 2025

Provincial Decided Vote: Progressive Conservatives have a 10-pt lead over Liberals with 42% of the decided vote

Q If a provincial election were held today, which party would you vote for? In that case, which party do you lean toward slightly? **[DECIDED]**
[decided voters only; n=708]



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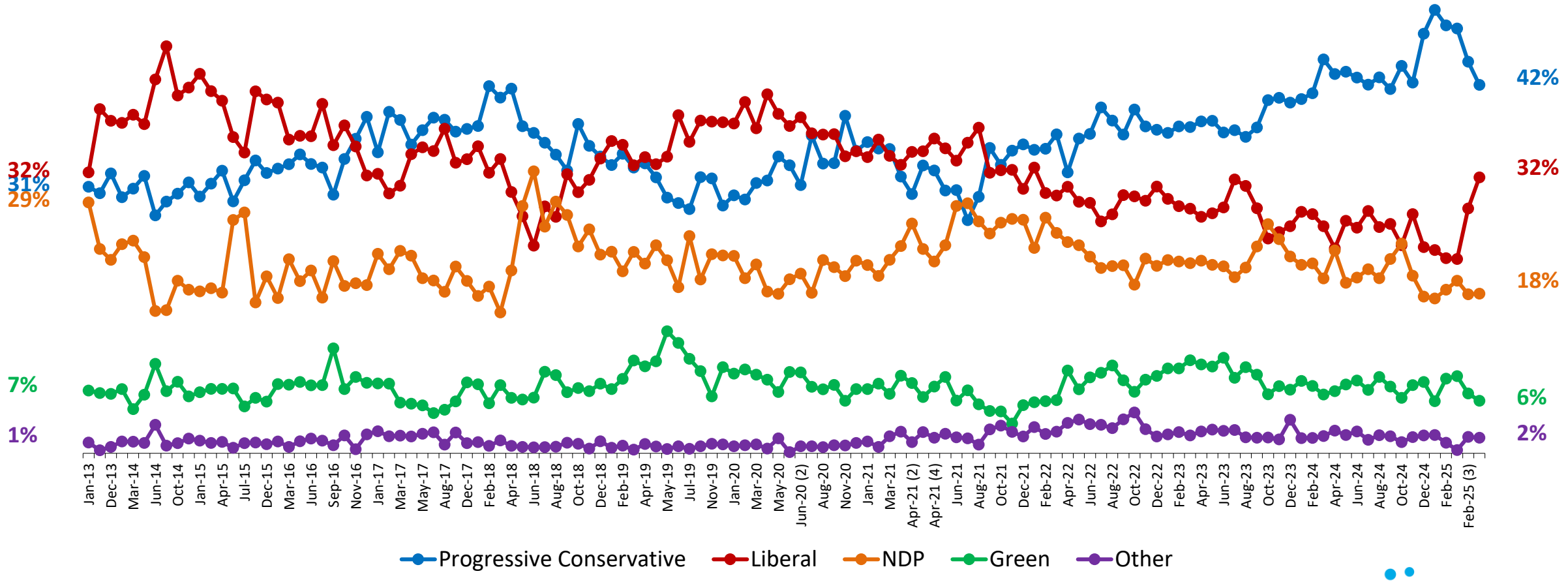
Current data: February 2025

Provincial Decided Vote Tracking: Progressive Conservative the lead on decided vote but Liberals have narrowed the gap

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

[only decided voters; n=708]



Current data: February 2025

Combined Vote by Region: PCs lead in all regions though the Liberals have narrowed the gap in Toronto

Region

Provincial Combined Vote	Toronto	Rest of GTA	South/West	North/East
	(N=161)	(N=206)	(N=210)	(N=222)
Liberal	34%	32%	25%	23%
Progressive Conservative	36%	43%	33%	37%
NDP	19%	9%	22%	15%
Green	3%	4%	7%	7%
Other	<1%	<1%	2%	3%
Undecided/DK	5%	9%	8%	9%
Would not vote/None	2%	2%	3%	6%

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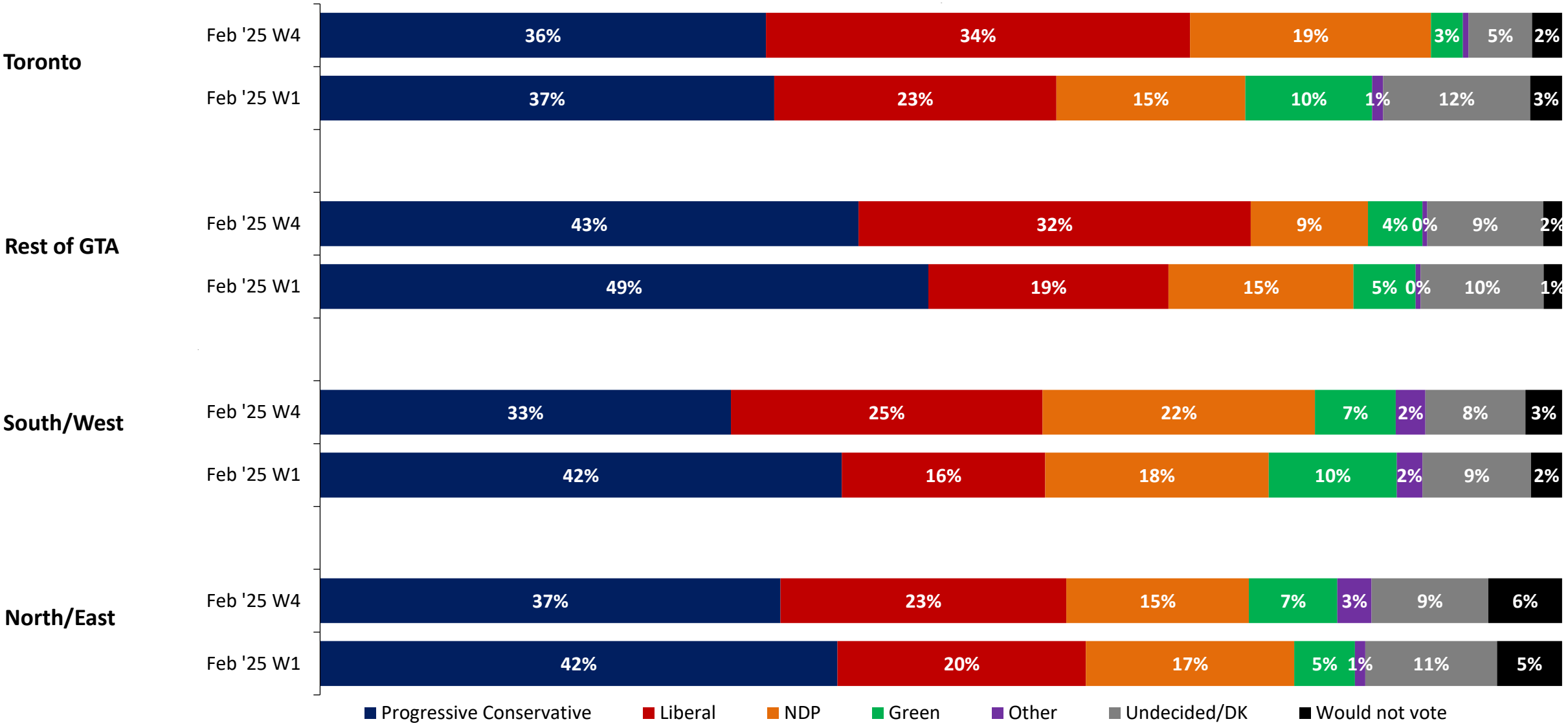
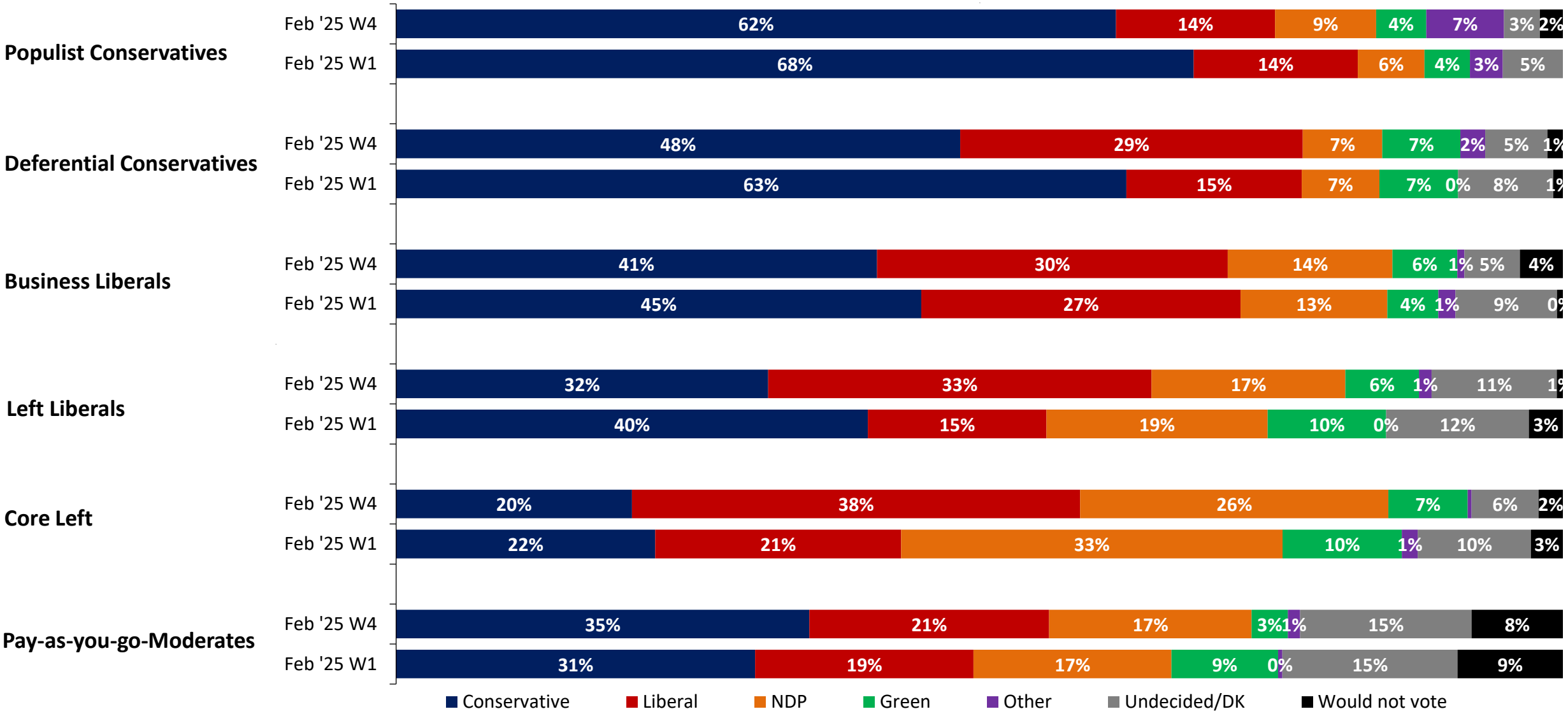
Note: Current data: February 2025

Provincial Vote: Who Moved?

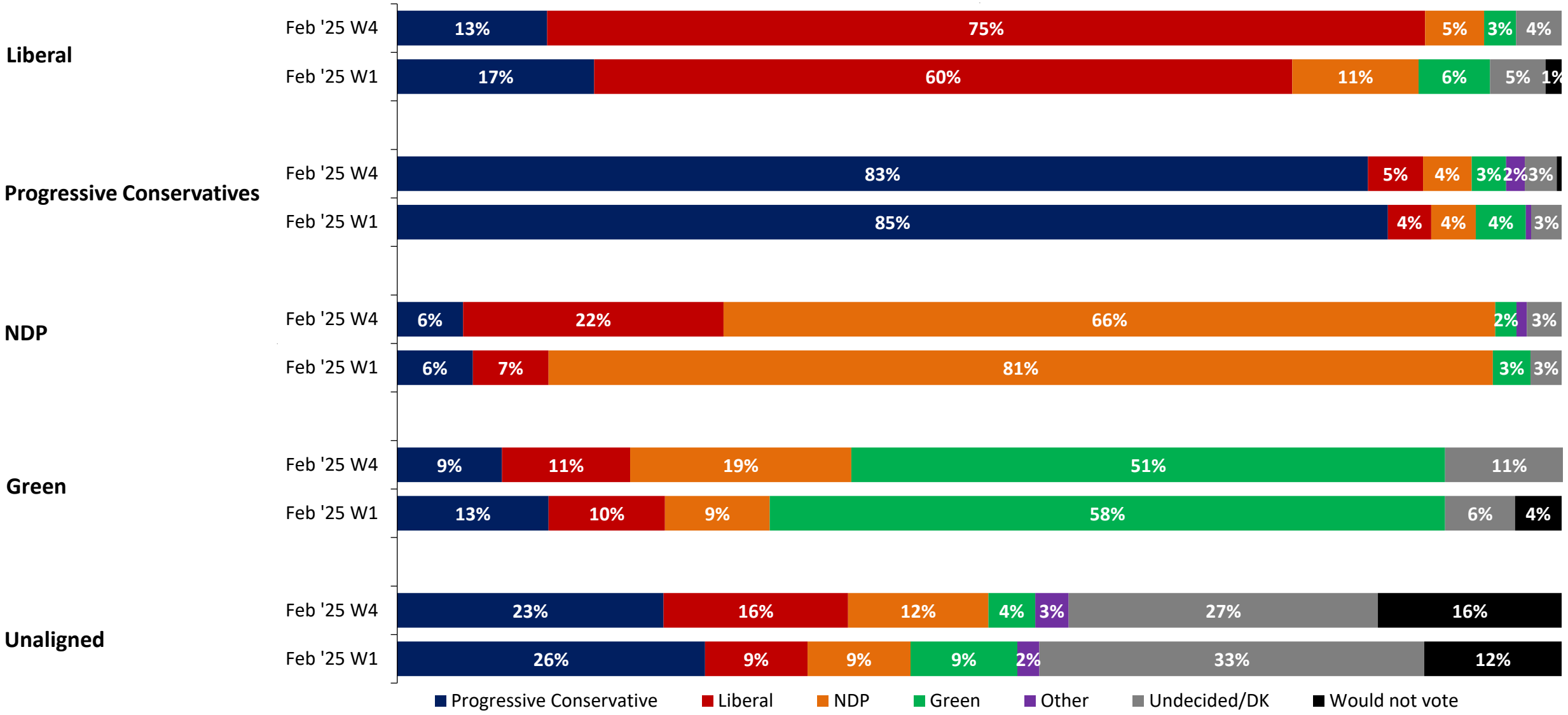
Combined Vote by Region Comparison: Since the beginning of February, PCs have lost support across all region while Liberals gained



Combined Vote by Value Cluster Comparison: Since W1, Liberals gained ground among Deferential Conservatives, Left Liberals and Core Left

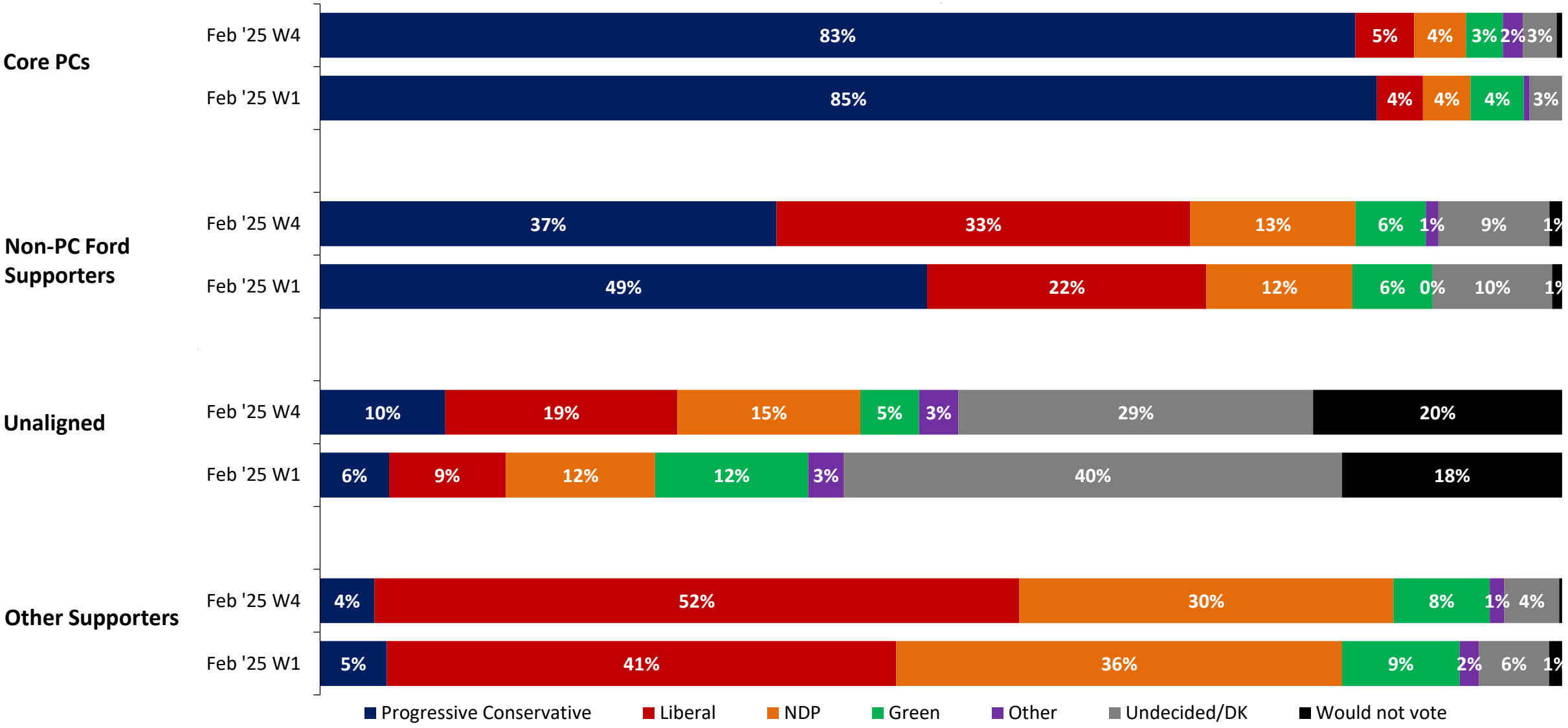


Combined Vote by Party ID Comparison: Liberals have made gains among their own base as well as among the NDP



Note: 'Other' on Party ID is not shown due to small n size.

Combined Vote by Ford Segment Comparison: Among Non-PC Ford supporters, PCs lost ground while Liberals gained

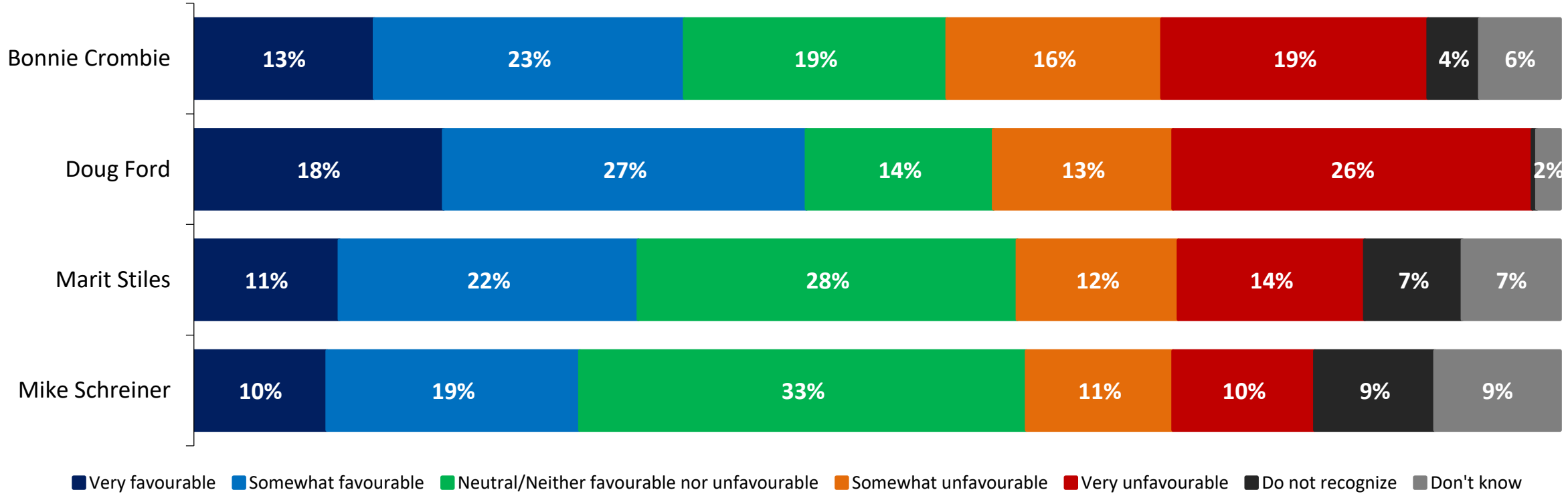


Leadership

Leader Favourables: Ford leads on leader favourability at 45% while Crombie follows behind at 36%

Q Below are the names of several individuals who have been mentioned in the news recently. For each one, please indicate whether you have heard of that person and, if so, whether you have a very favourable, somewhat favourable, neither favourable or unfavourable, somewhat unfavourable or very unfavourable impression of that person. If you do not recognize the name, just indicate.

[asked of all respondents; n=800]

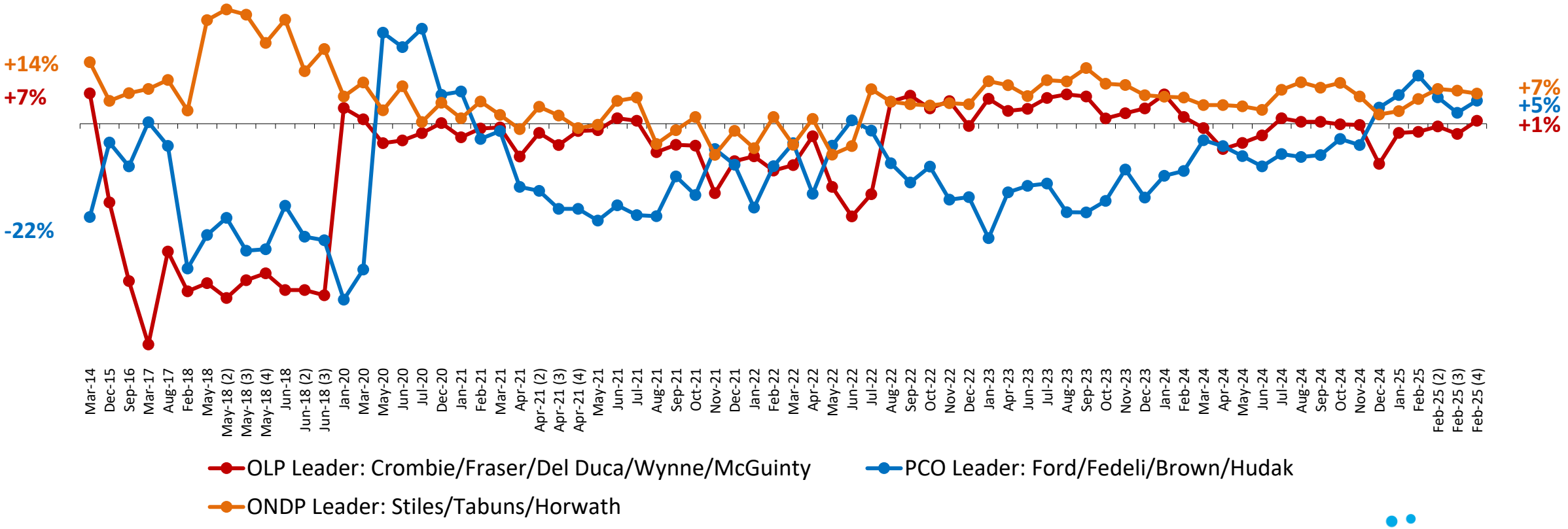


Current data: February 2025

Ontario Party Leader NET Favourables Tracking: Stiles continues to lead on net favourability at +7% with Ford following close behind at +5%

Q Below are the names of several individuals who have been mentioned in the news recently. For each one, please indicate whether you have heard of that perso and, if so, whether you have a very favourable, somewhat favourable, neither favourable or unfavourable, somewhat unfavourable or very unfavourable impression of that person. If you do not recognize the name, just indicate.

[asked of all respondents; n=800]



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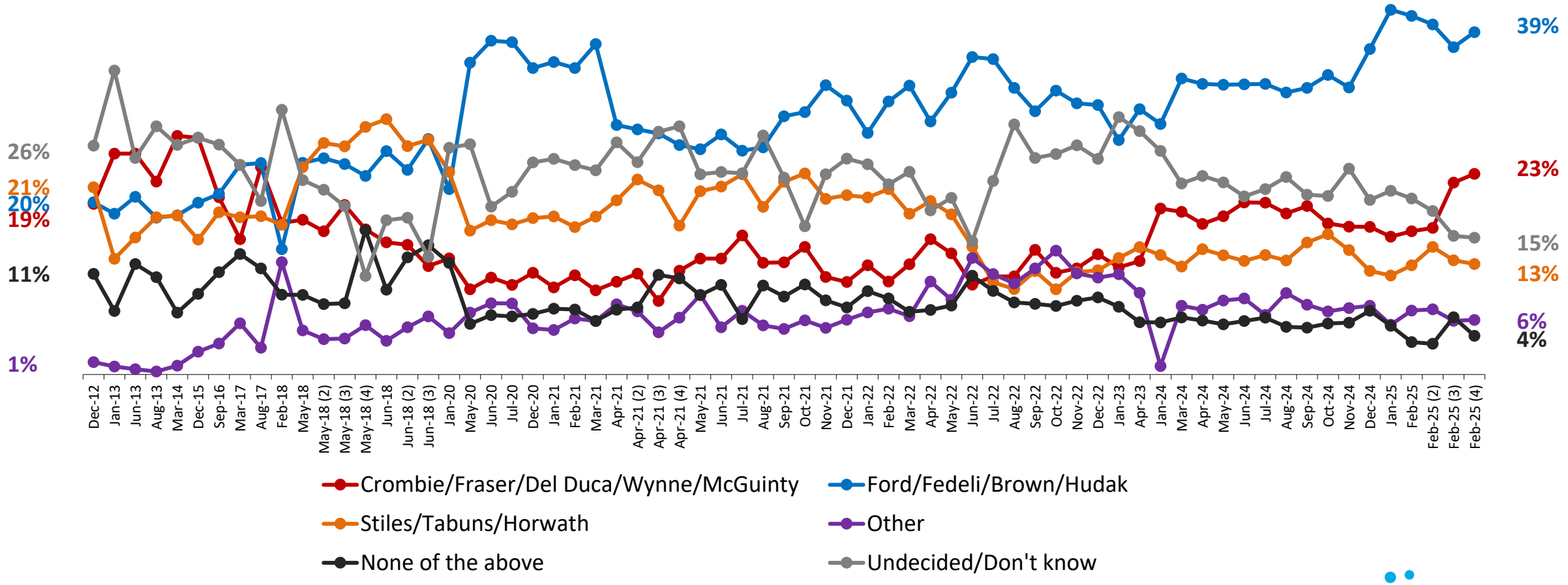
Current data: February 2025

Best Premier Tracking: Ford maintains his lead on ‘best Premier’ at 39% though Crombie have made recent gains and follows at 23%

Q Which of the following leaders would make the best Premier of [PROV]?

[asked of all respondents; n=800]

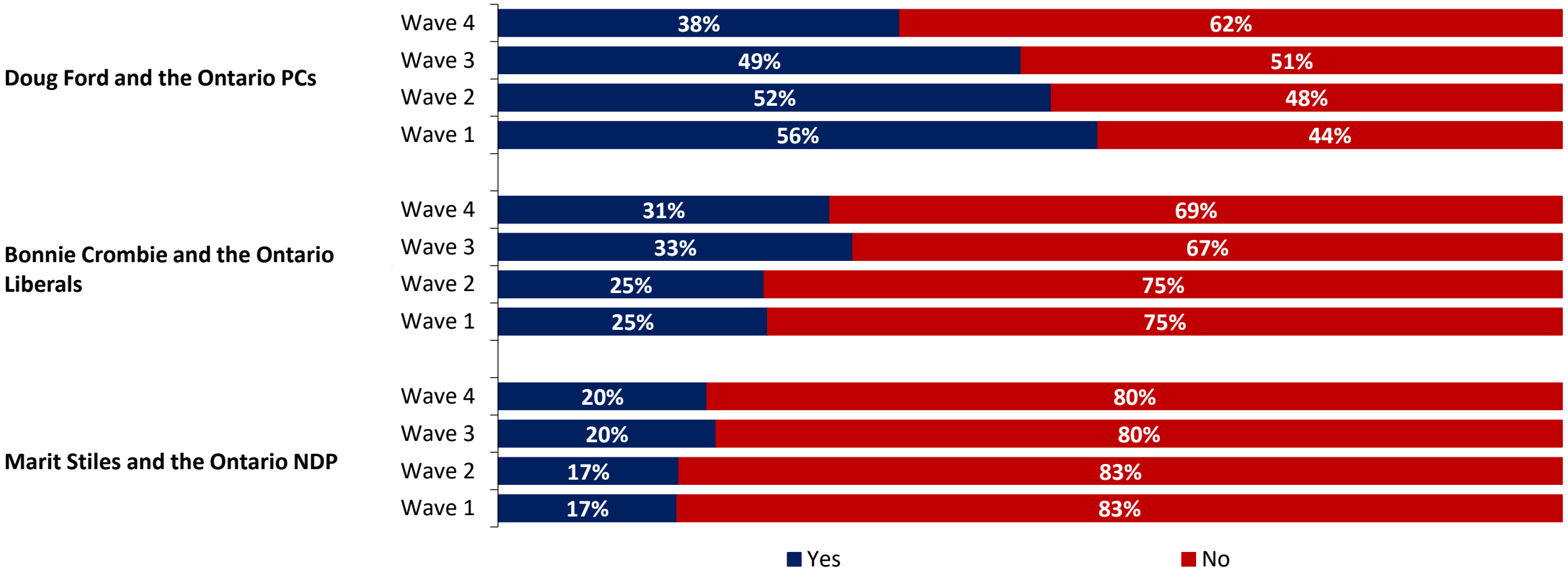


Current data: February 2025

Read, Seen, Heard

Campaign Attention: RSH about Ford have dropped off since the beginning of the month; RSH about Crombie and Stiles stable

Q Have you read, seen or heard anything about [LEADER] and the [PARTY] in the last few days?
[asked of all respondents; n=800]



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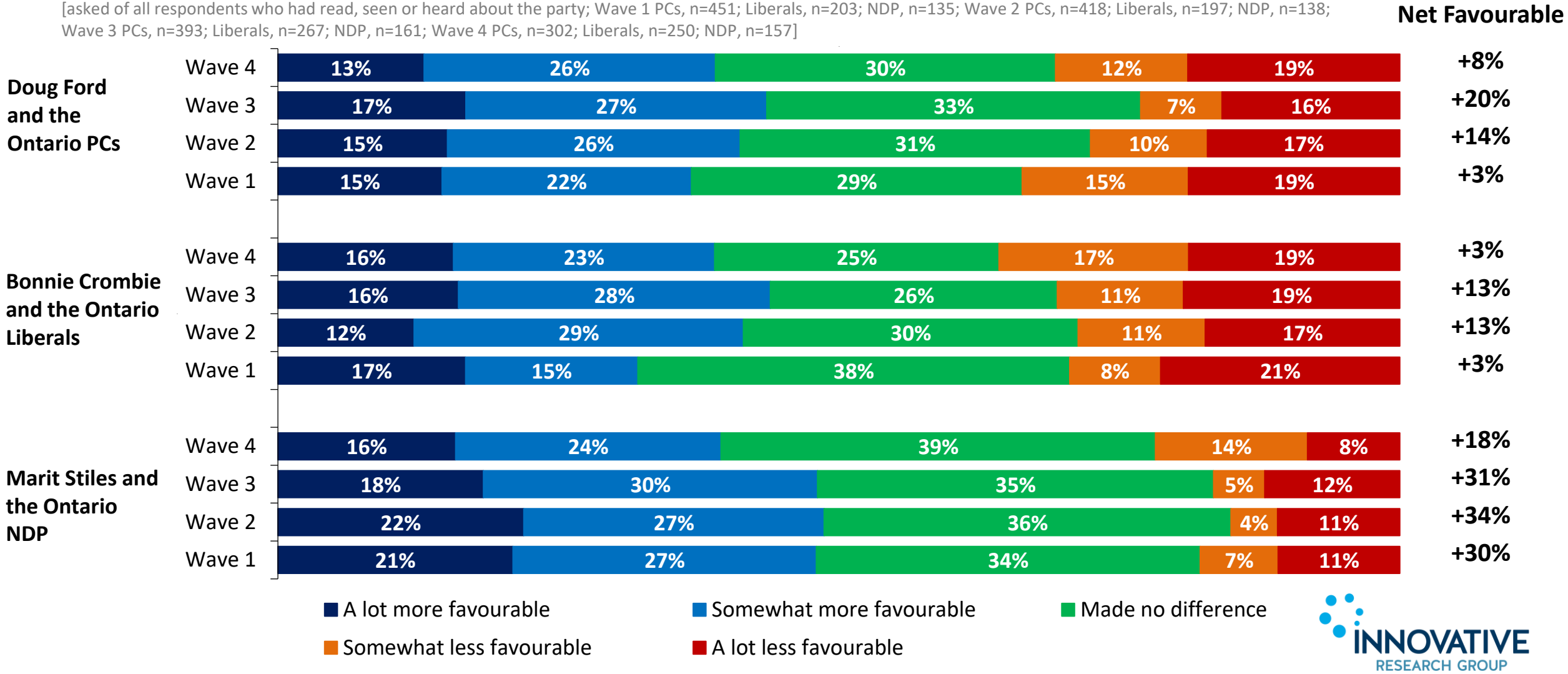
RSH Impact: Across all three parties asked, RSH impact is down; Crombie has the lowest net favourability

Q Did what you read, see or hear leave you feeling a lot more favourable, somewhat more favourable, somewhat less favourable or a lot less favourable towards [LEADER] and the [PARTY], or did it make no difference?

[asked of all respondents who had read, seen or heard about the party; Wave 1 PCs, n=451; Liberals, n=203; NDP, n=135; Wave 2 PCs, n=418; Liberals, n=197; NDP, n=138; Wave 3 PCs, n=393; Liberals, n=267; NDP, n=161; Wave 4 PCs, n=302; Liberals, n=250; NDP, n=157]



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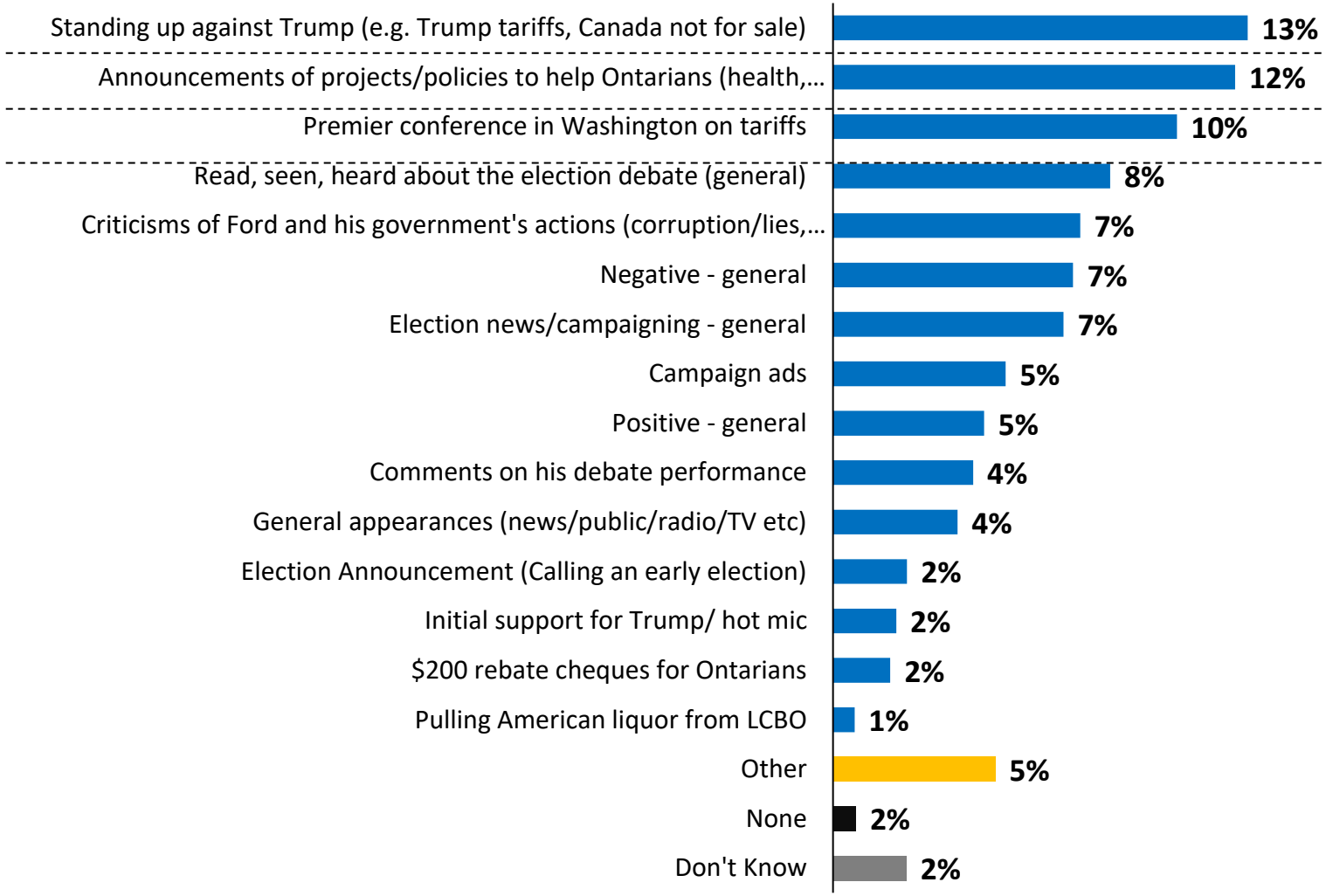
RSH PCs: Top mention is Ford standing up against Trump, followed by announcements of projects/policies to help Ontarians

Q And what did you read, see, or hear about Doug Ford and the Progressive Conservative party? [OPEN END]

[asked only of those who RSH about Doug Ford and the PCs; Wave 4 n=302]



Impact by RSH

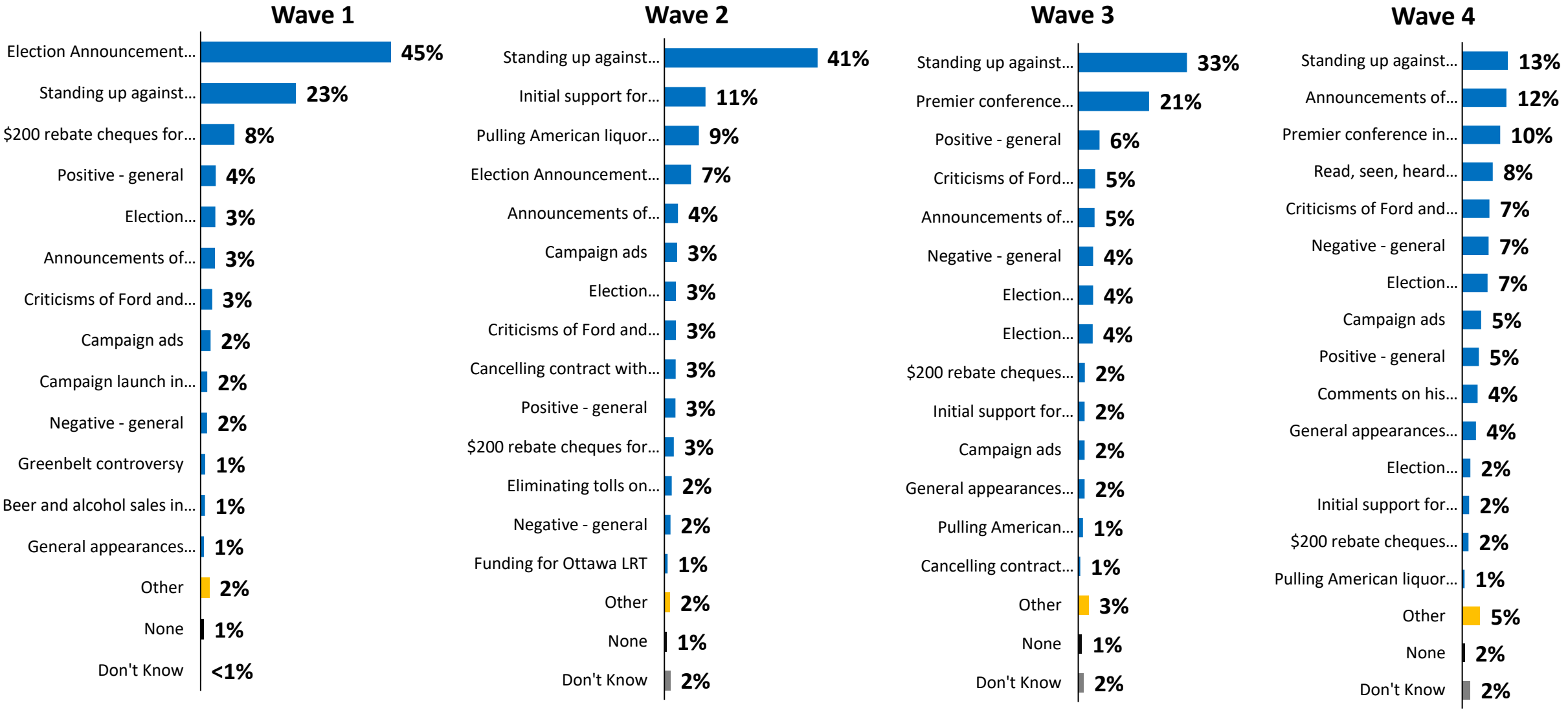
	More fav.	No Difference	Less fav.	NET
Standing up against Trump (e.g. Trump tariffs, Canada not for sale)	54%	37%	10%	+44%
Announcements of projects/policies to help Ontarians (health,...	51%	20%	29%	+22%
Premier conference in Washington on tariffs	39%	46%	16%	+23%

Note: 'No response' (3%) not shown.

RSH PCs (Tracking): Across all waves of tracking, top recall of Ford is him standing up against Trump

Q And what did you read, see, or hear about Doug Ford and the Progressive Conservative party? [OPEN END]

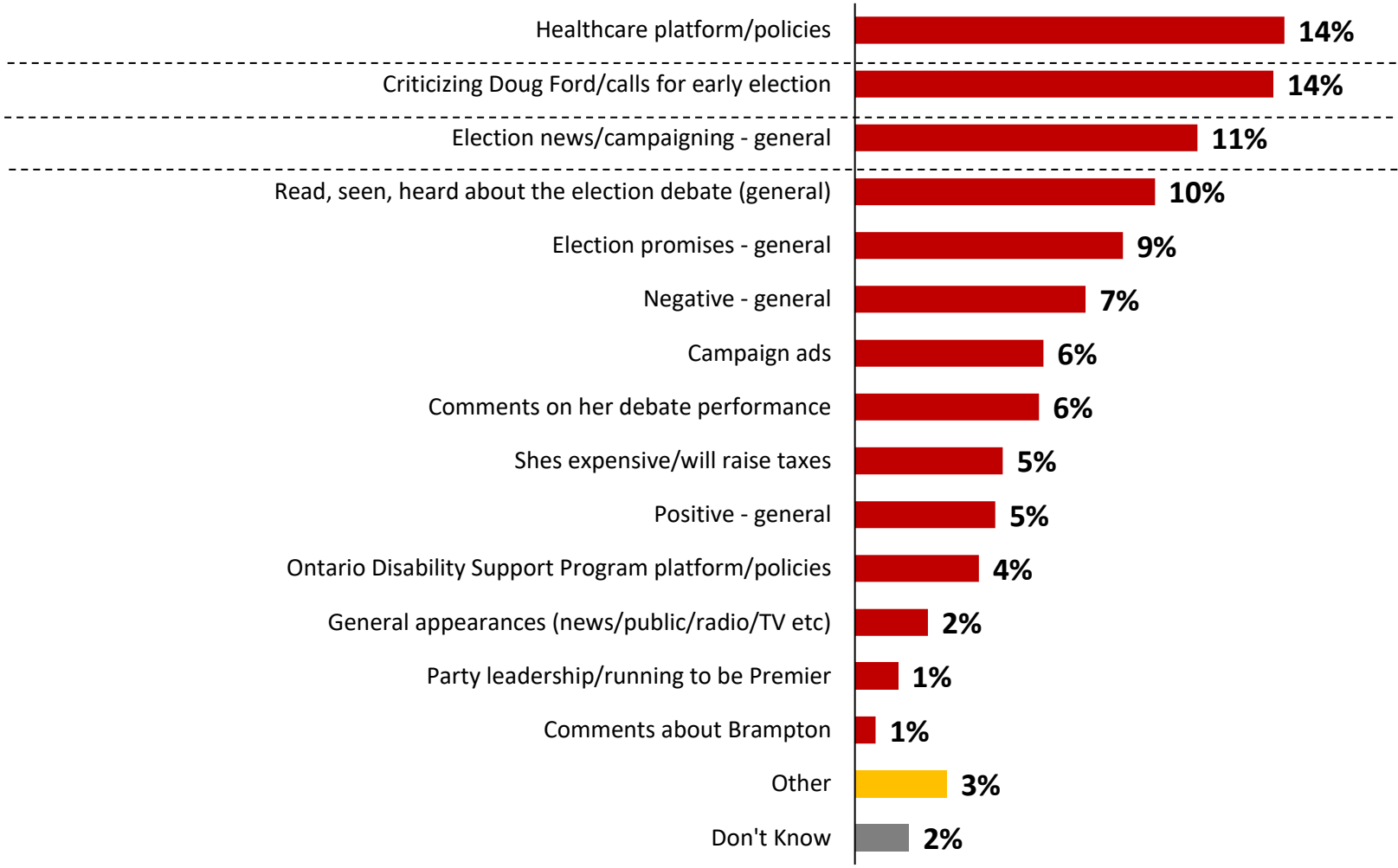
[asked only of those who RSH about Doug Ford and the PCs; Wave 1 n=451; Wave 2 n=418; Wave 3 n=393; Wave 4 n=302]



RSH Liberals: Top mention of Crombie is her healthcare platform which had a positive impact of +35%

Q And what did you read, see, or hear about Bonnie Crombie and the Ontario Liberal party? [OPEN END]

[asked only of those who RSH about Bonnie Crombie and the Liberals; Wave 4 n=250]



Impact by RSH

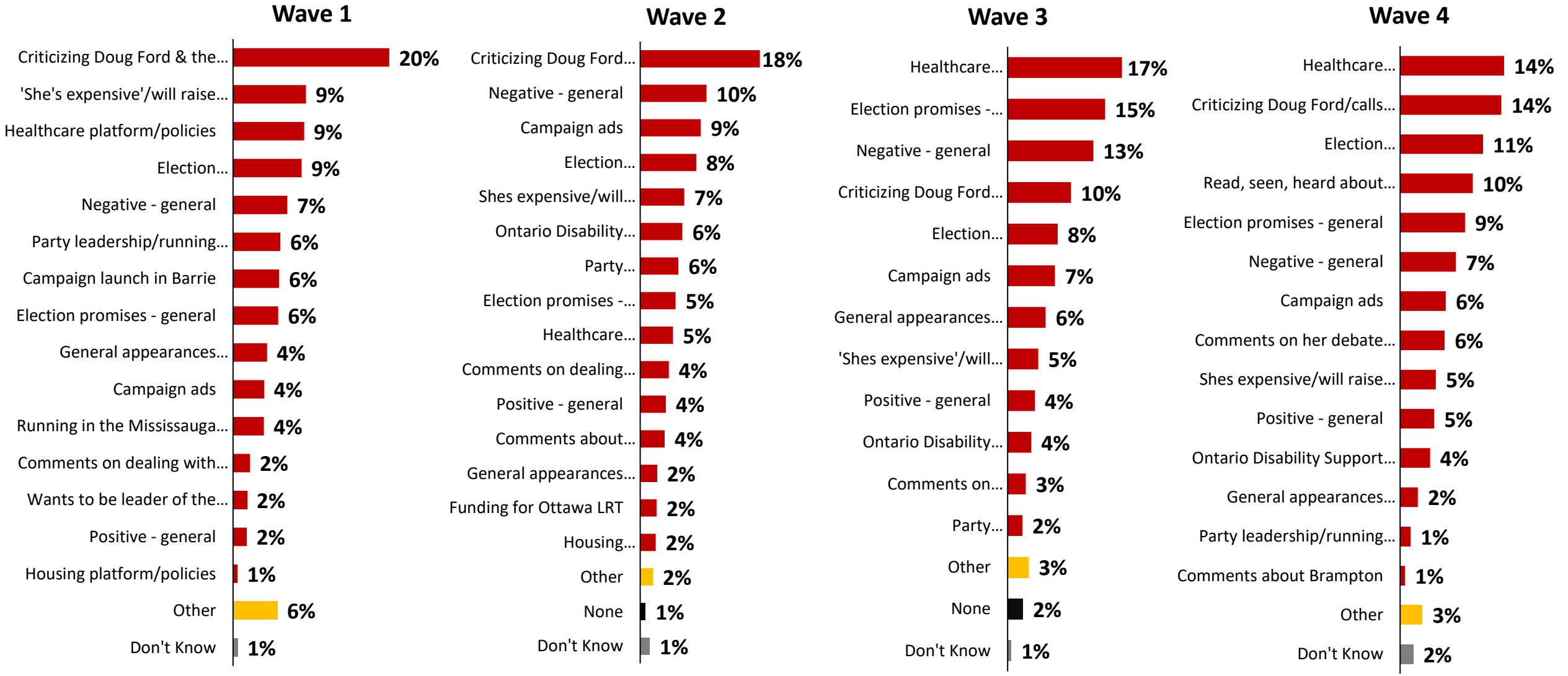
	More fav.	No Difference	Less fav.	NET
Healthcare platform/policies	61%	14%	26%	+35%
Criticizing Doug Ford/calls for early election	21%	25%	53%	-32%
Election news/campaigning - general	30%	28%	42%	-11%

Note: 'No response' (1%) not shown.

RSH Liberals (Tracking): Crombie's healthcare platform/policies remain top mention for the last couple waves

Q And what did you read, see, or hear about Bonnie Crombie and the Ontario Liberal party? [OPEN END]

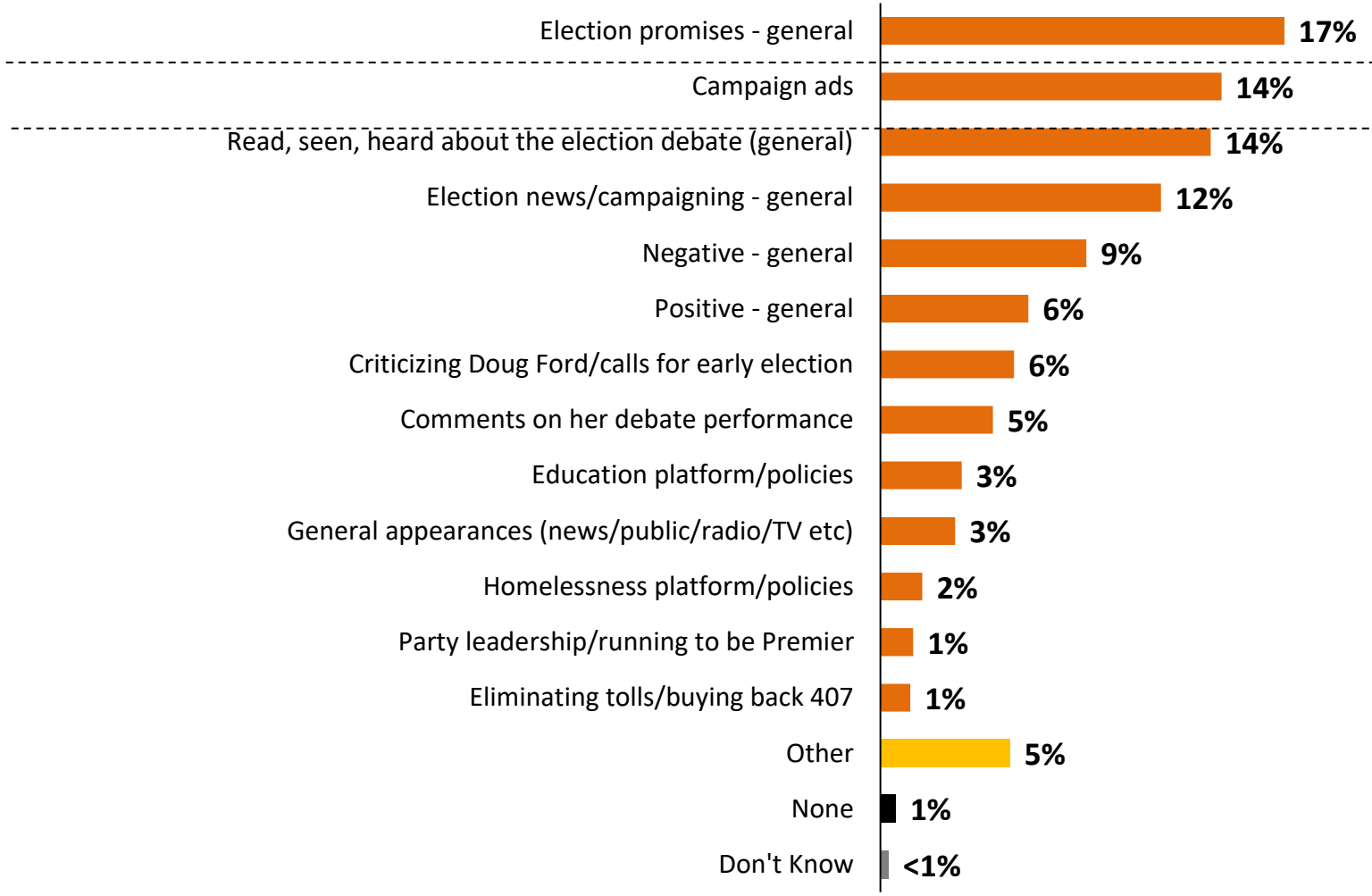
[asked only of those who RSH about Bonnie Crombie and the Liberals; Wave 1 n=203; Wave 2 n=197; Wave 3 n=267; Wave 4 n=250]



RSH New Democrats: Top two mentions for Stiles election promises and campaign ads

Q And what did you read, see, or hear about Marit Stiles and the New Democratic Party? [OPEN END]

[asked only of those who RSH about Marit Stiles and the NDP; Wave 4 n=157]



Impact by RSH

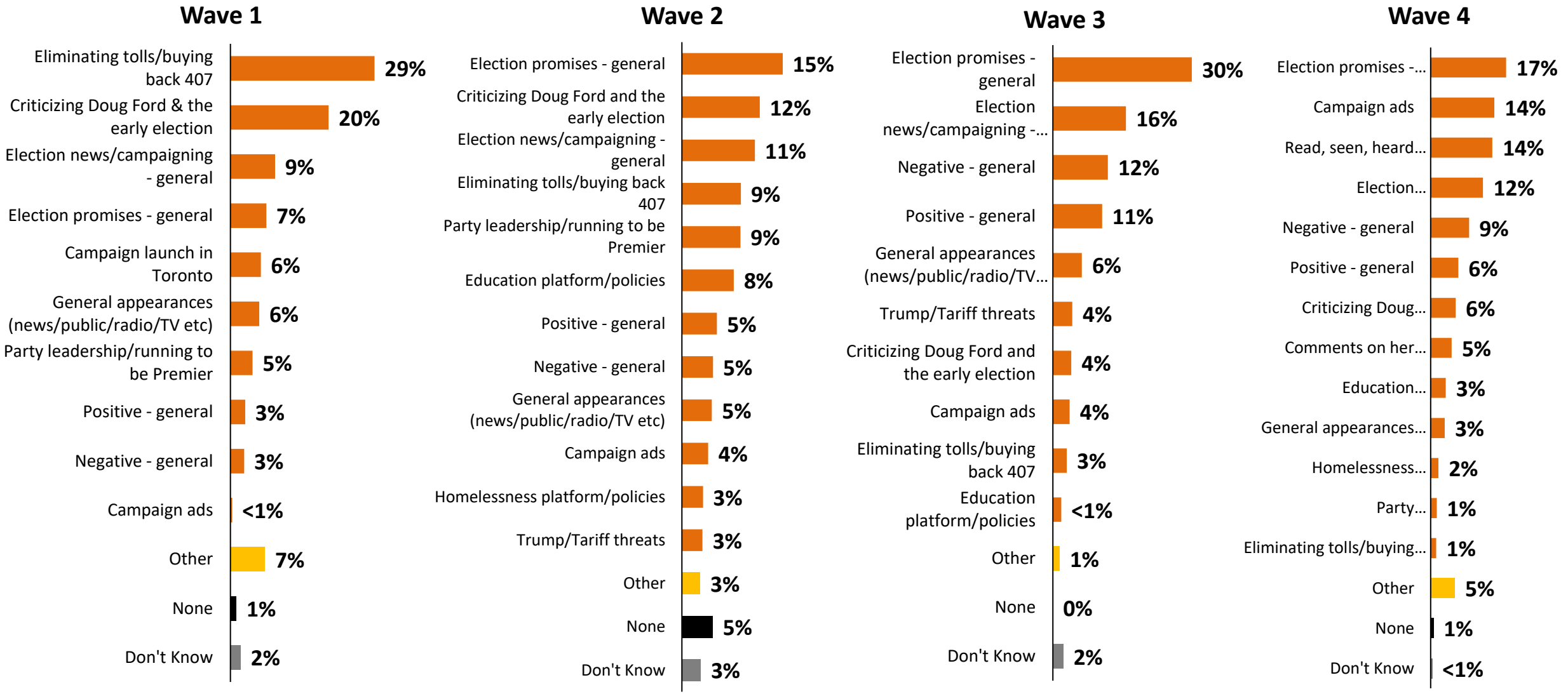
	More fav.	No Difference	Less fav.	NET
Election promises - general	52%	30%	18%	+35%
Campaign ads	26%	61%	13%	+13%

Note: 'No response' (1%) not shown. Impact only shown for top 2 mentions due to small n-size.

RSH NDP (Tracking): Election promises from Stiles was the top mention in the previous couple waves

Q And what did you read, see, or hear about Marit Stiles and the New Democratic Party? [OPEN END]

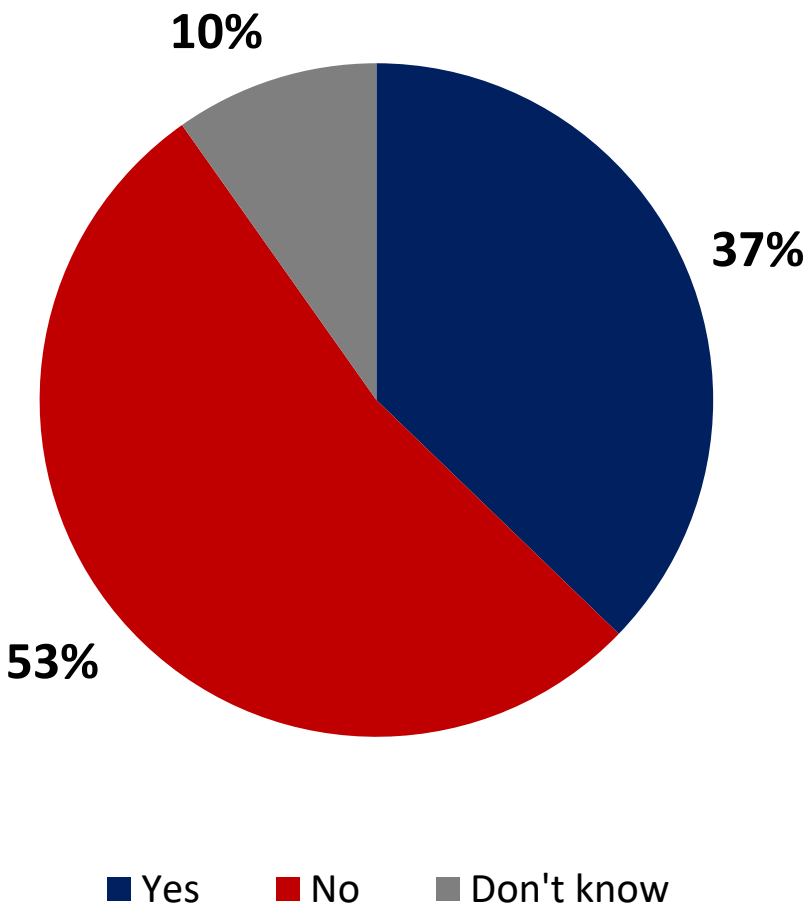
[asked only of those who RSH about Marit Stiles and the NDP; Wave 1 n=135; Wave 2 n=138; Wave 3 n=161; Wave 4 n=157]



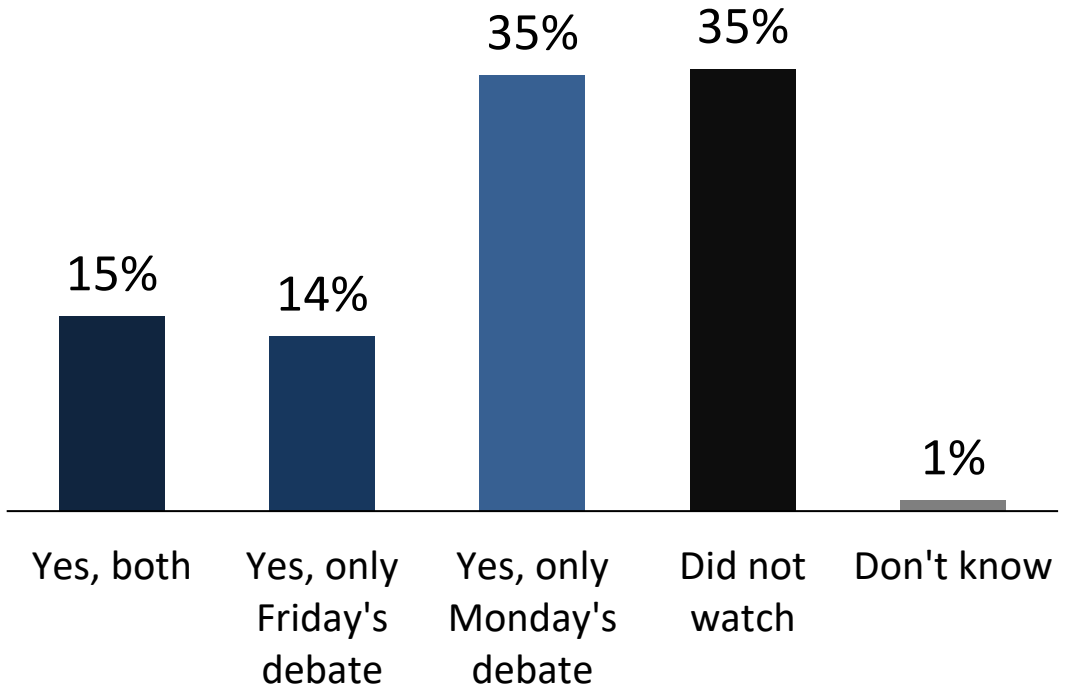
Election Debate

Attention: Over half did not RSH about the ON leader debate; of those who did, 1-in-3 (35%) watched only Monday's debate

Q Have you read, seen, or heard anything about the Ontario leader's debates held on Friday, February 14th and Monday, February 17th?
[asked of all respondents, n=800]



Q Did you happen to watch either of the leader's debates yourself?
[asked of those who at least RSH about the debate; n=298]



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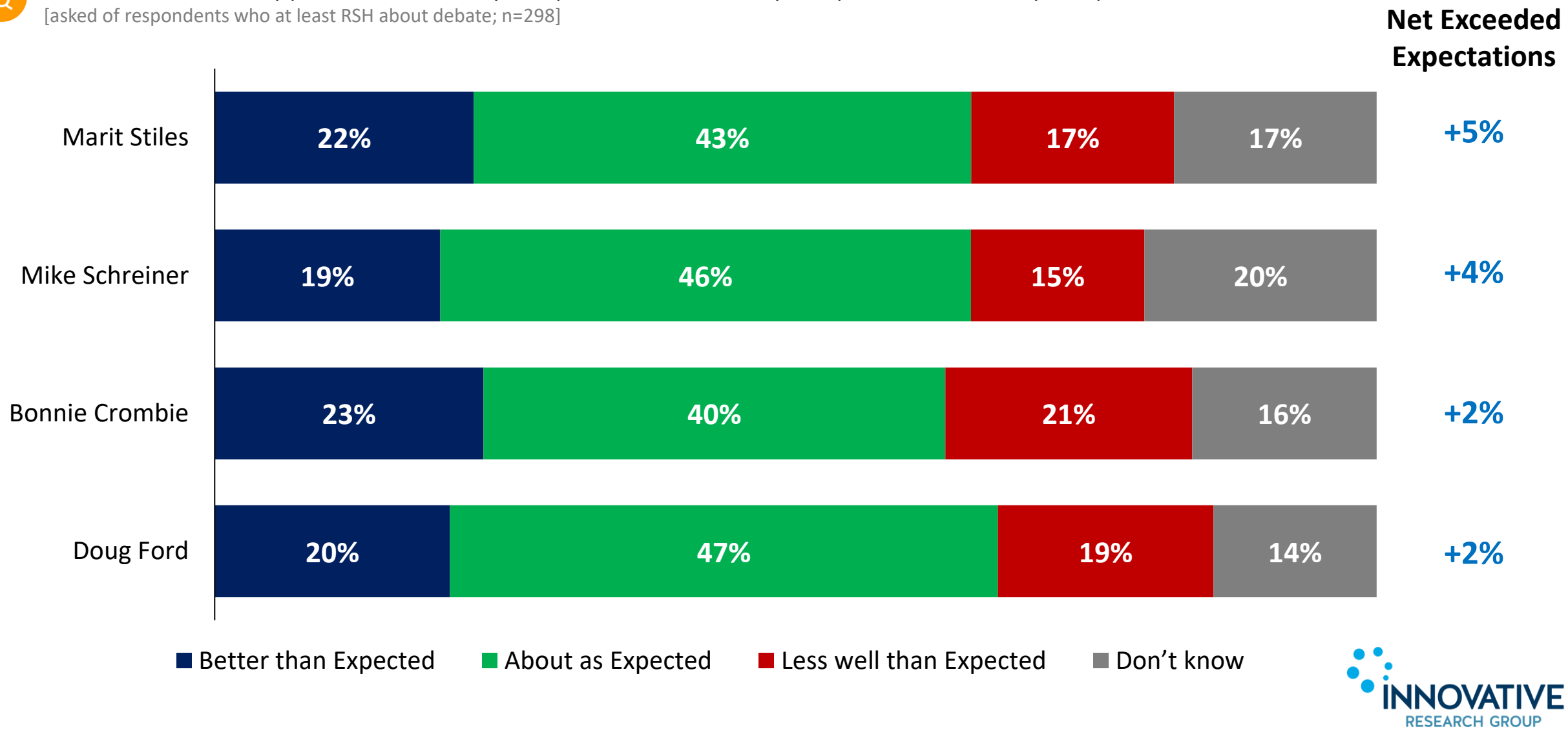
Expectations: Nearly half (47%) say Ford performed about as expected; Stiles has the highest net score at +5%

Q For each leader, did they perform better than you expected, less well than you expected, or about as you expected in the leader's debate?
[asked of respondents who at least RSH about debate; n=298]



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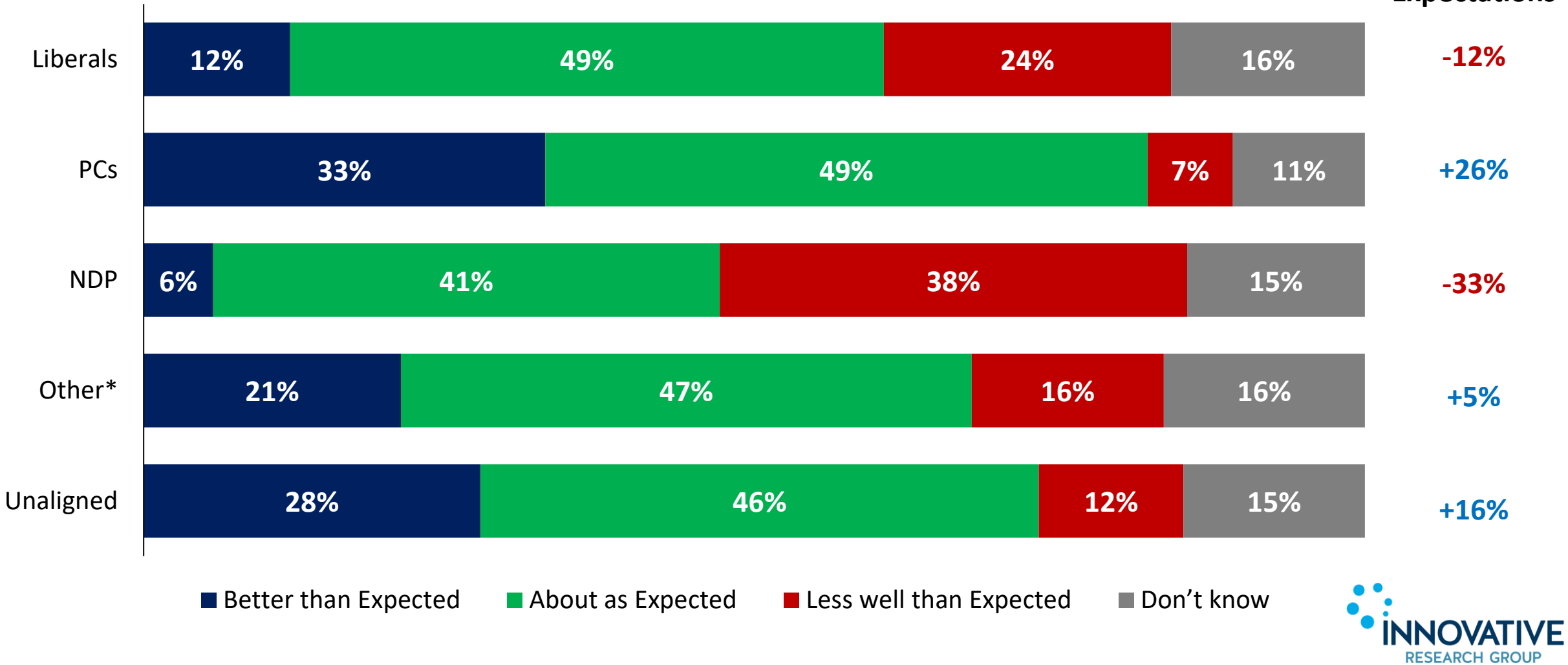
Doug Ford: Ford does better than expected among PCs and those unaligned but worse than expected among NDP partisans

Q For each leader, did they perform better than you expected, less well than you expected, or about as you expected in the leader's debate?

Doug Ford

[asked of respondents who at least RSH about debate; n=298]



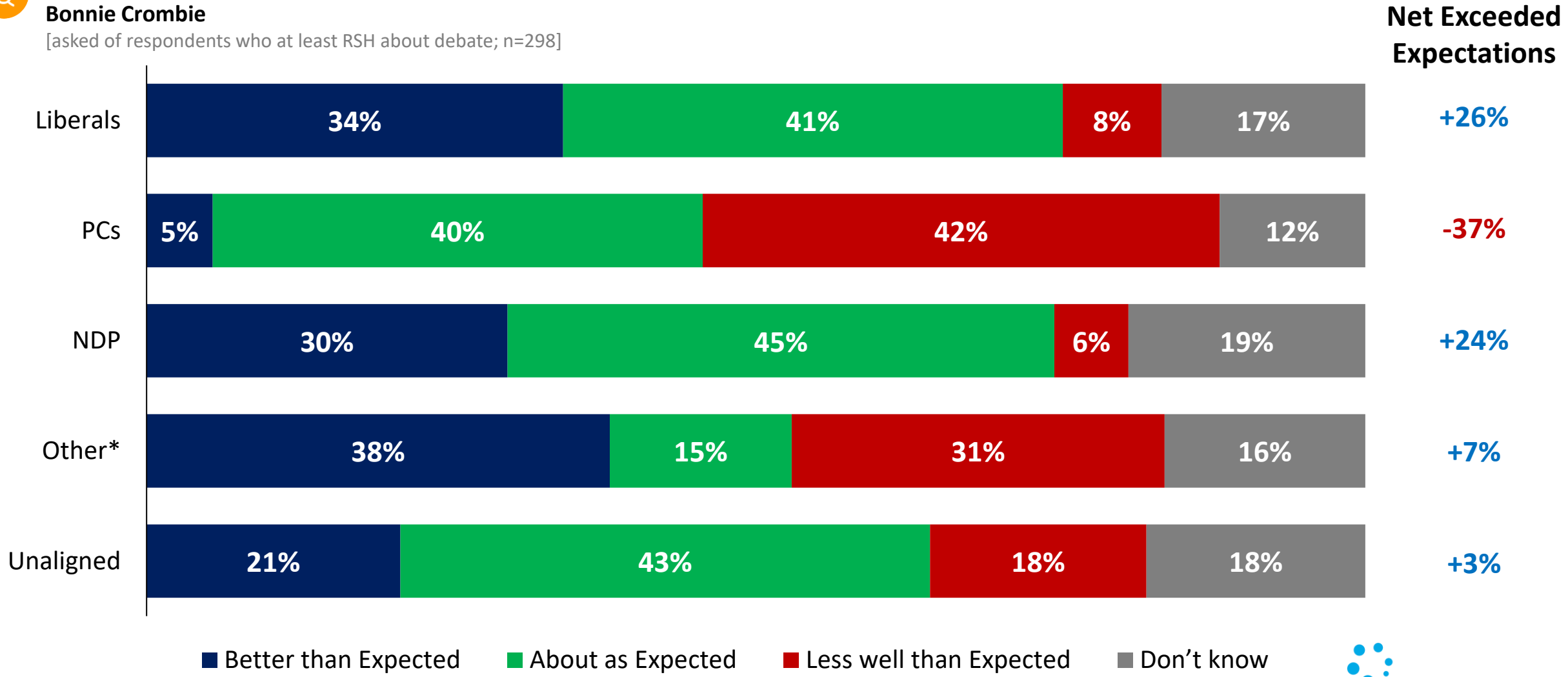
Note: * indicates a small sample size. Treat results with caution.

Bonnie Crombie: Crombie did better than expected among Liberals and other partisans but did worse than expected among PCs

Q For each leader, did they perform better than you expected, less well than you expected, or about as you expected in the leader's debate?

Bonnie Crombie

[asked of respondents who at least RSH about debate; n=298]



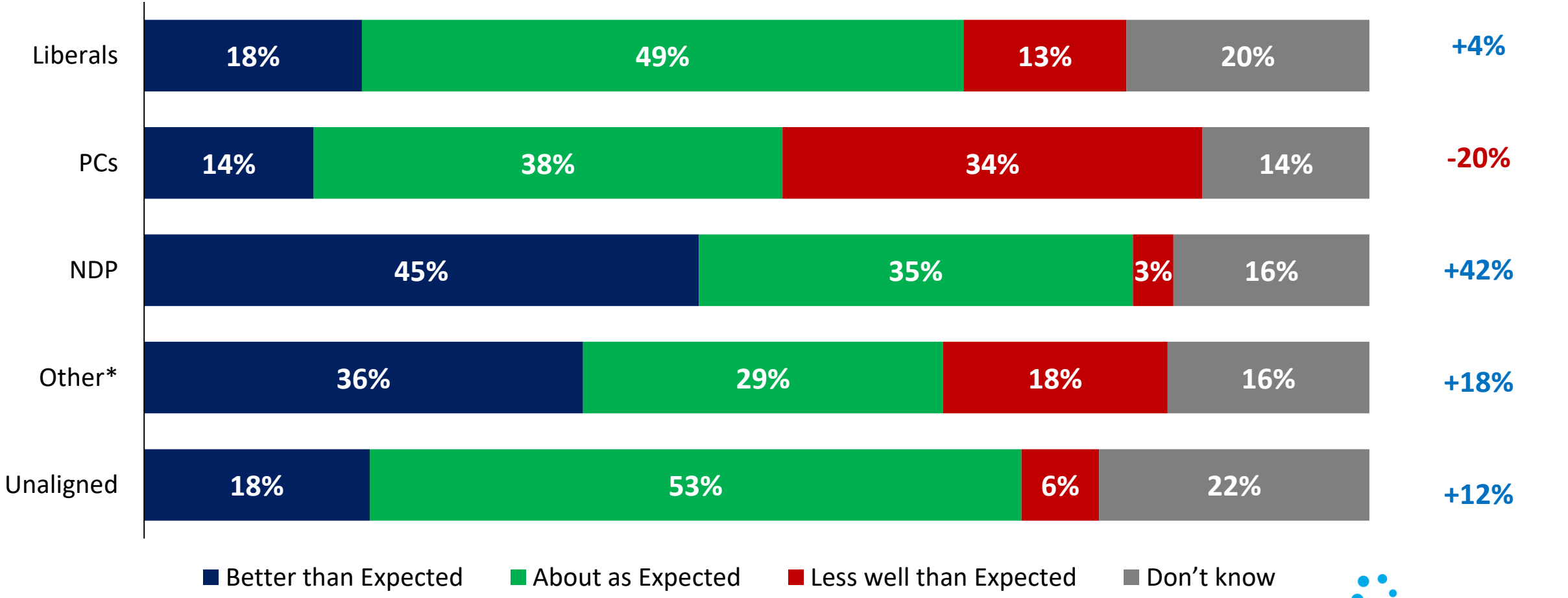
Note: * indicates a small sample size. Treat results with caution.

Marit Stiles: Stiles performs the best among NDP and other but worse than expected among PCs

Q For each leader, did they perform better than you expected, less well than you expected, or about as you expected in the leader's debate?

Marit Stiles

[asked of respondents who at least RSH about debate; n=298]



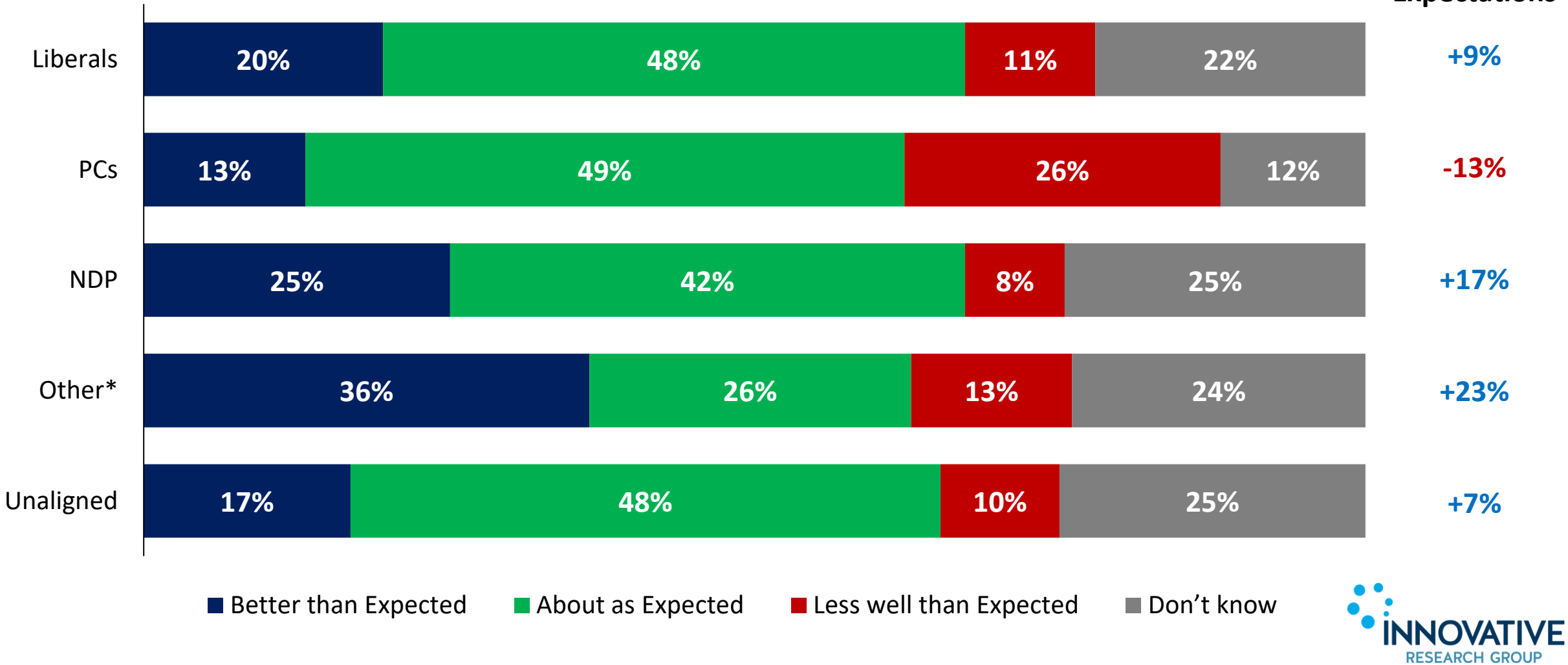
Note: * indicates a small sample size. Treat results with caution.

Mike Schreiner: Schreiner does better among NDP and Liberals though worse than expected among PCs

Q For each leader, did they perform better than you expected, less well than you expected, or about as you expected in the leader's debate?

Mike Schreiner

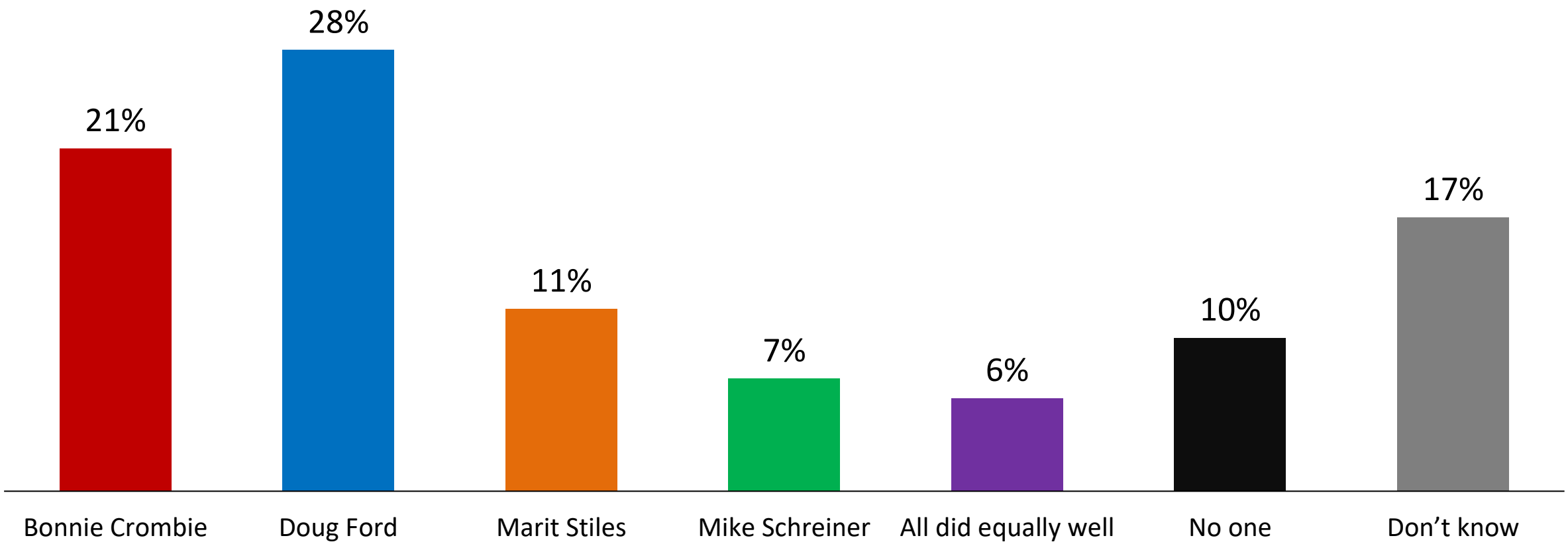
[asked of respondents who at least RSH about debate; n=298]



Note: * indicates a small sample size. Treat results with caution.

Winning: Over 1-in-4 (28%) say Ford did the best in the debate followed by Crombie at 21%

Q In your opinion, which leader did the best in that debate?
[asked of those who RSH; n=298]



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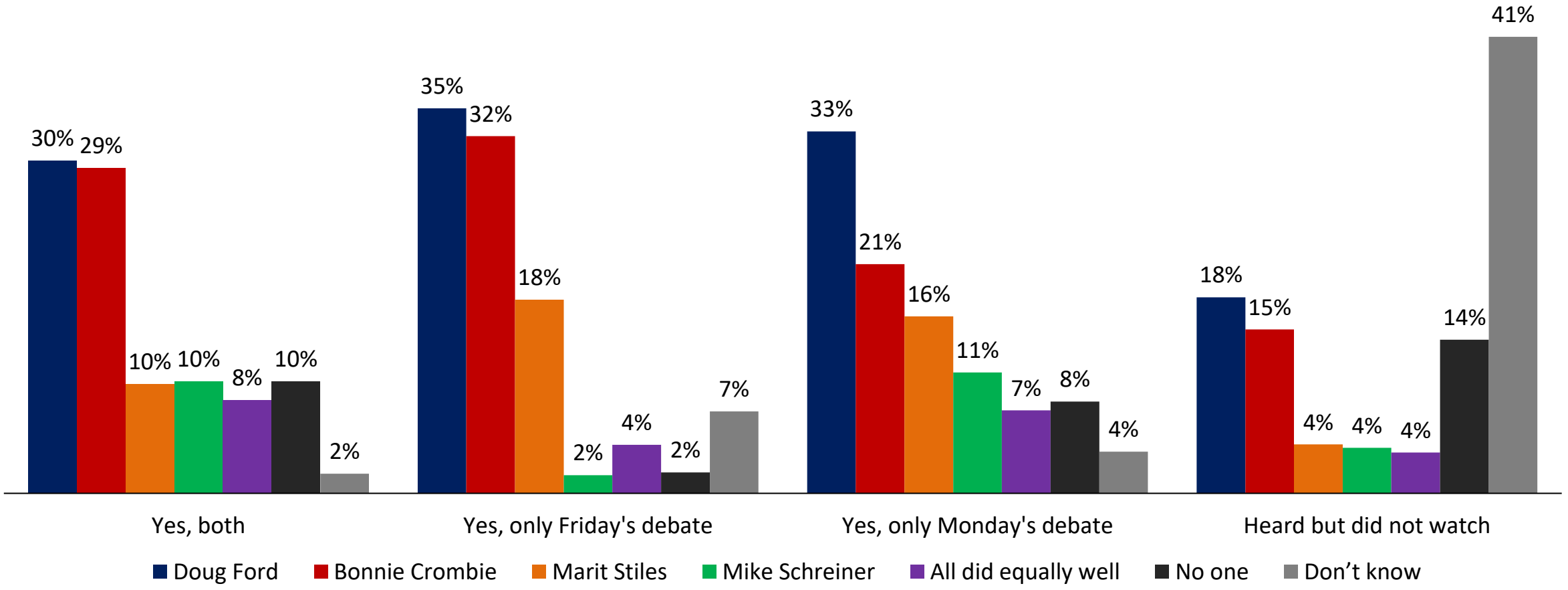
Winning: Across the board, more felt Ford did the best followed by Crombie

Q In your opinion, which leader did the best in that debate? By RSH about debate
[asked of those who RSH; n=298]



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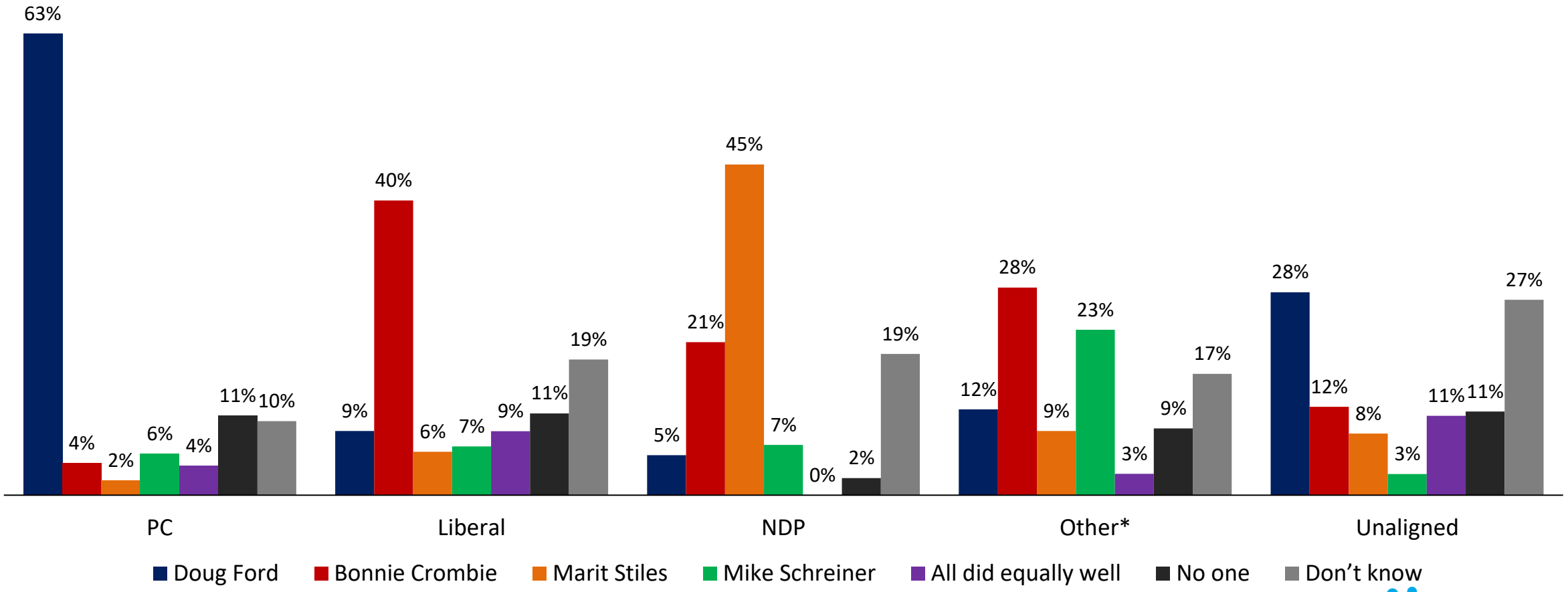
Winning: Each candidate did best among their own respective parties; Crombie performed best among, while Ford was best among unaligned

Q In your opinion, which leader did the best in that debate? **By Partisanship**

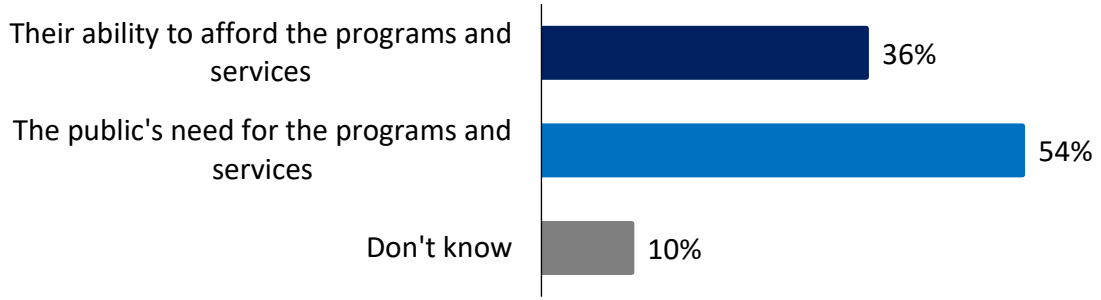


Note: * indicates a small sample size. Treat results with caution.

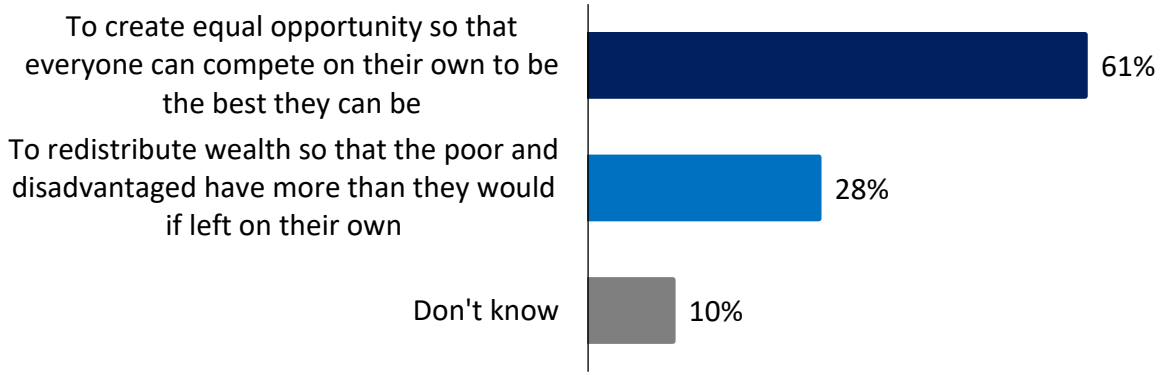
Segmentations

Core Political Values: 3-in-5 say the main role of government is to create equal opportunity

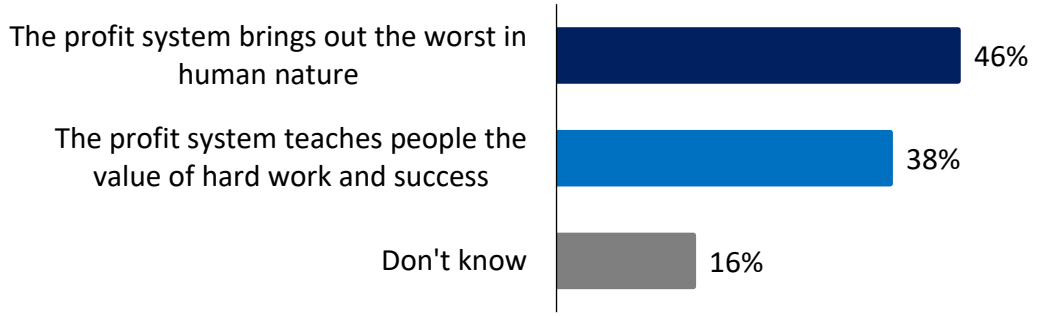
Q When governments make major decisions concerning spending on programs and services, do you think they should be basing their decisions mainly on…?
[asked of all respondents; n=800]



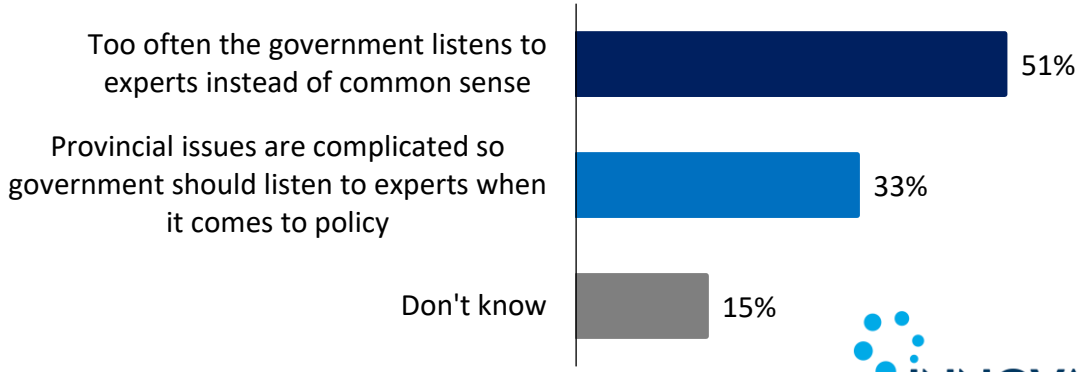
Q Is the main role of government to…?
[asked of all respondents; n=800]



Q Which of the following statements comes closest to your view?
[asked of all respondents; n=800]



Q When it comes to government decision making, which of the following statements is closest to your view?
[asked of all respondents; n=800]



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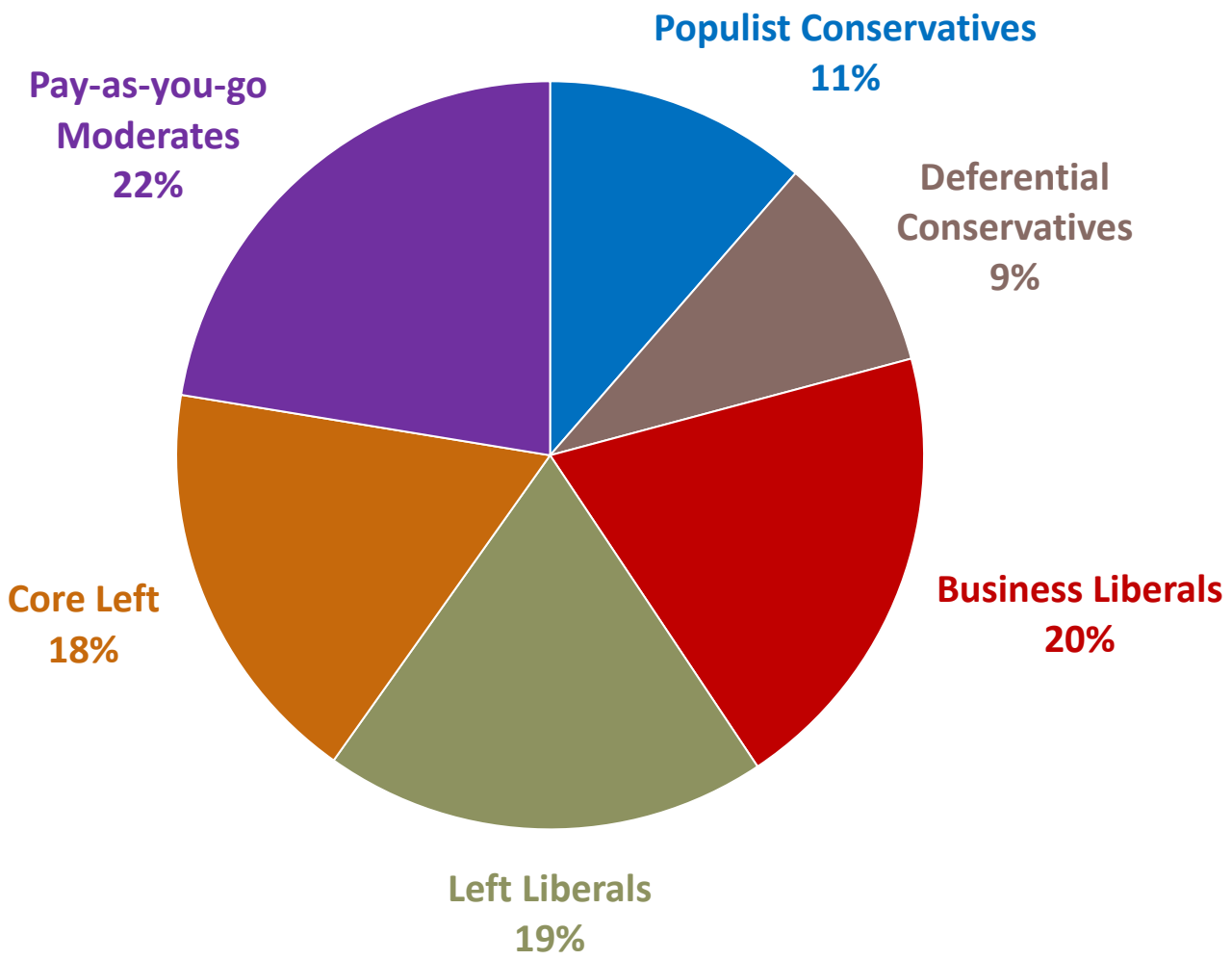
Current data: February 2025

Value Clusters: Pay-as-you-go Moderates each make up of around 20% of Ontarians

Q 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.

[asked of all respondents; n=800]



Current data: February 2025

Defining Value Clusters: Business Liberals split between government decision making though more lean towards listening to experts

Core Political Values by Value Clusters

Column %		Populist Conservatives	Deferential Conservatives	Business Liberals	Left Liberals	Core Left	Pay-as-you-go Moderates
Governments should base decisions on...	Ability to afford	96%	90%	0%	0%	0%	75%
	Public Need	0%	0%	94%	94%	95%	0%
Is the main role of government to...?	Create equal opportunity	100%	70%	75%	99%	0%	42%
	Redistribute wealth	0%	25%	18%	0%	95%	25%
When it comes to government decision making...	Rely on common sense	100%	0%	41%	58%	41%	57%
	Listen to experts	0%	83%	45%	28%	47%	13%
The profit system...	Brings out the worst in human nature	0%	0%	0%	82%	87%	67%
	Teaches value of hard work and success	88%	91%	93%	0%	0%	6%

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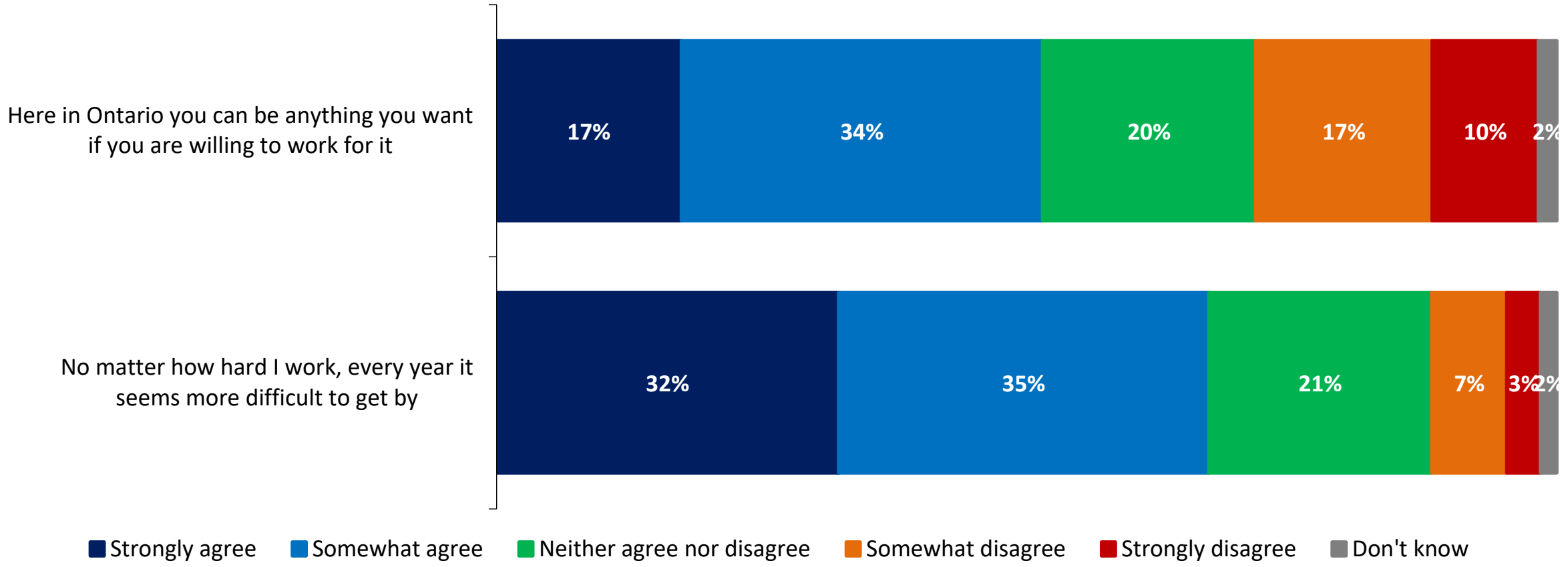
Note: Current data: February 2025

Economic Gap Segmentation: Half agree that you can anything you want if you work for it; 67% say every year it is more difficult to get by

Q Do you agree or disagree with the following statements?
[asked of all respondents; n=800]



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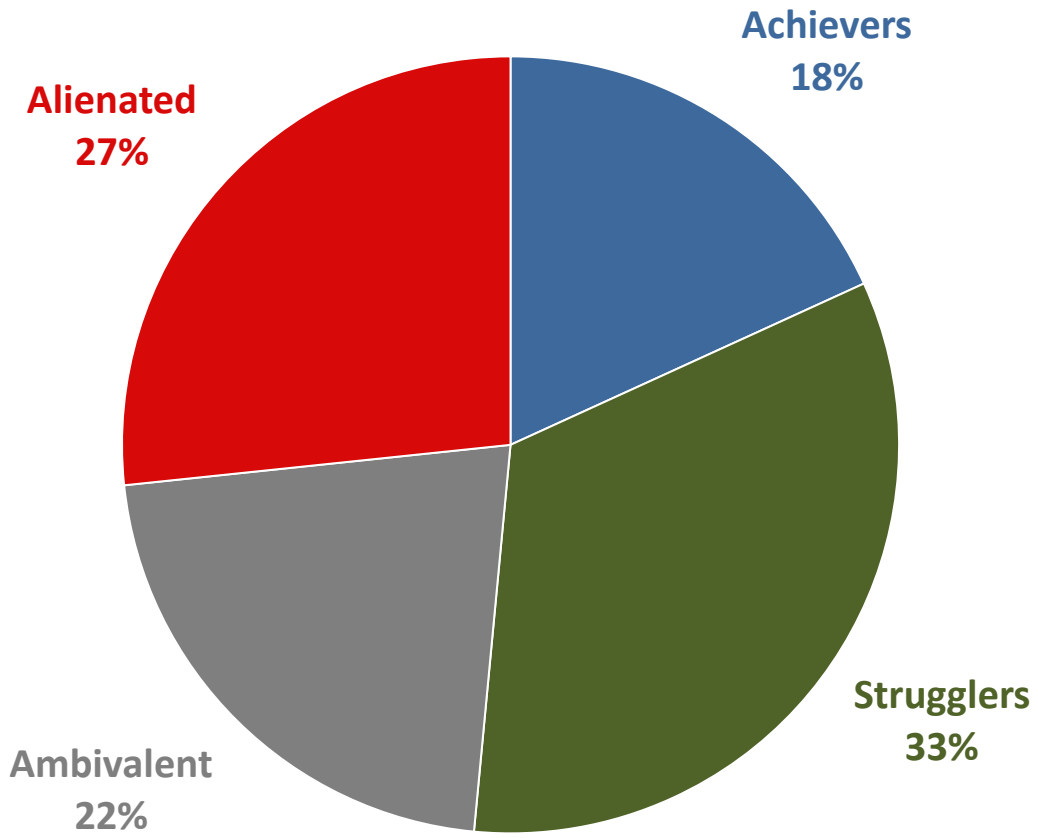
Current data: February 2025

Economic Gap Segmentation: A third of Ontarians are strugglers while 27% are Alienated

Q Gap segmentation: Agree with 'Here in Ontario 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'.

[asked of all respondents; n=800]



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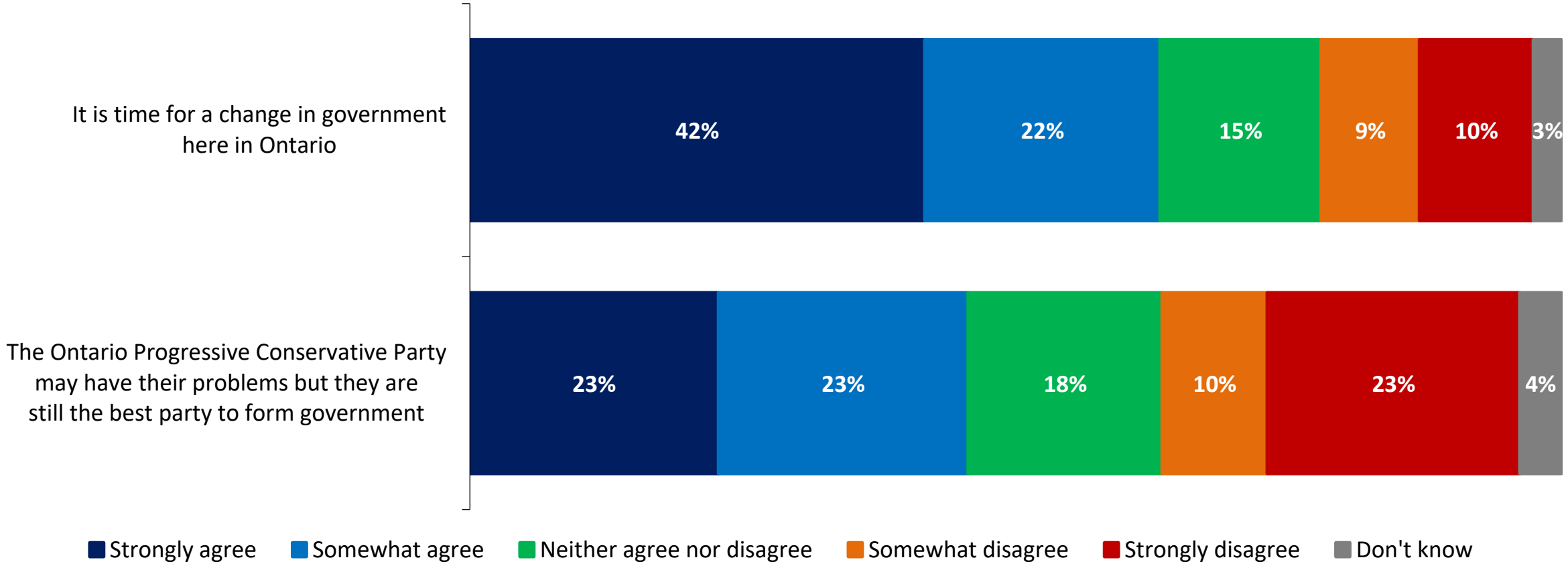
Current data: February 2025

Time for Change Attitudes: Over 3-in-5 (63%) agree it is time for a change in government; 46% say PCs are still the best party to lead

Q Do you agree or disagree with the following statements?
[asked of all respondents; n=800]



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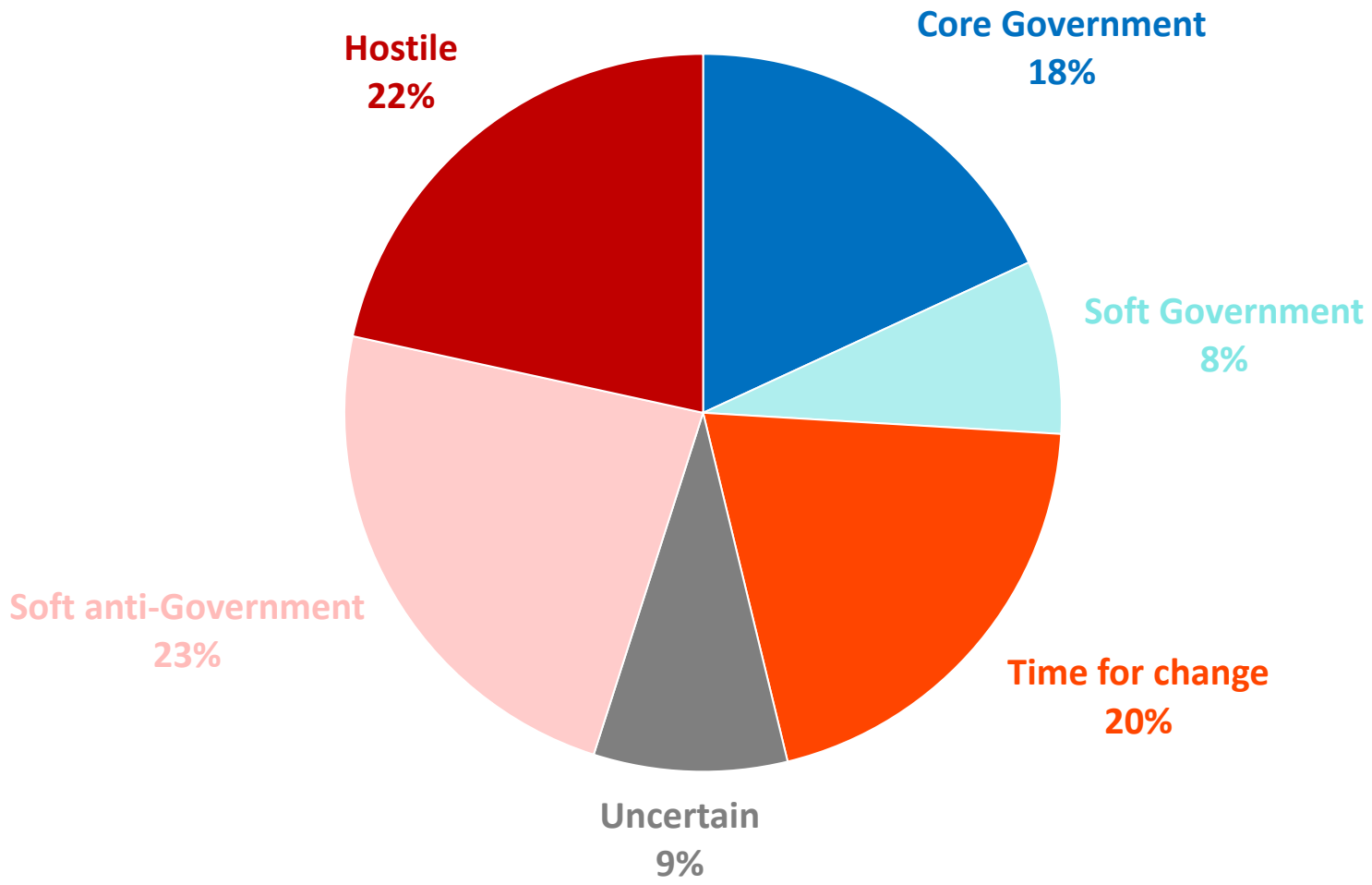
Current data: February 2025

Time for Change Segmentation: 20% are ‘Time for a change’ while another 23% are Soft anti-government and 22% are hostile

Q Time for Change segmentation: Agree with 'The PCs may have their problems but they are still the best party to form government' BY Agree with 'It is time for a change in government here in Ontario'.

[asked of all respondents; n=800]



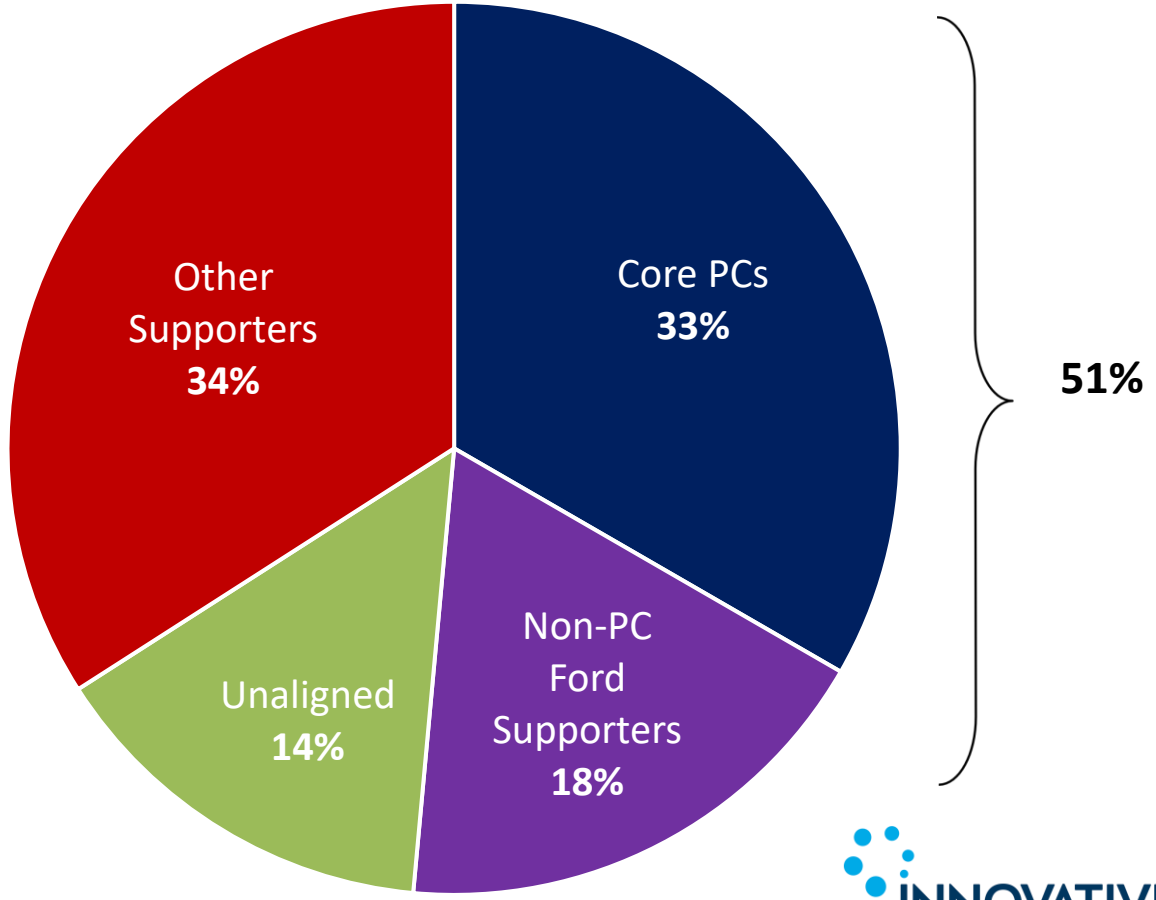
Current data: February 2025

Ford Personal Vote: Half are Ford supporters, including 18% who have a positive impression of Ford, but are not PC identifiers

Q Respondents are grouped according to their impression of Doug Ford **BY Provincial Party ID and Doug Ford Impression**
[asked of all respondents; n=800]

Impression of Doug Ford BY Party ID

Segment	Description
Core PCs	Positive impression of Doug Ford and identify as a PC
Non-PC Ford Supporters	Positive impression of Doug Ford and DO NOT identify as a PC
Unaligned	Unaligned and neutral or negative impression of Doug Ford
Other Supporters	Neutral or negative impression of Doug Ford and identify as a partisan for another party



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Current data: February 2025

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Building Understanding.

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