Ontario Election

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 838 adults. The final sample is weighted to n=800 among all adults.

WHEN?

February 5th to February 6th, 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. The Ontario PCs continue to maintain a huge lead with 49% in the decided vote.

2. The Ontario PC lead is built on a firm foundation. The Ontario PC's and Doug Ford enjoy significant leads on every issue and performance attribute asked in this survey.

3. While 49% of the electorate is open to hearing more before they make their final choice, the Liberals and NDP have been unable to gain attention given the tariff drama unfolding.

4. The PC lead is built on a firm foundation. More than half (57%) approve the provincial government's response to Donald Trump. Almost half (45%) say Doug Ford is the leader best suited to respond to the tariff threat. Crombie is at 15% and Stiles sits at 9%

5. Doug Ford beats the other leaders on all other positive attributes, even on delivering positive change!

6. The PC party leads on every issue. It even edges out the Green party on environment!

Most Important Issue

Most Important Issue Tracking: Cost of living stands out as the top issue with 43%, health care follows at 19%

Q Which of the following issues is the most important issue to you?
[asked of all respondents; n=800]

Legend:
- Health care
- Education
- Jobs
- Debt and the deficit
- The environment
- Social issues
- Electricity
- The cost of living and housing
- Indigenous issues
- Crime
- K-12 Education
- Post-secondary education
- Immigration
- Other
- Don't know
- Relations with the US
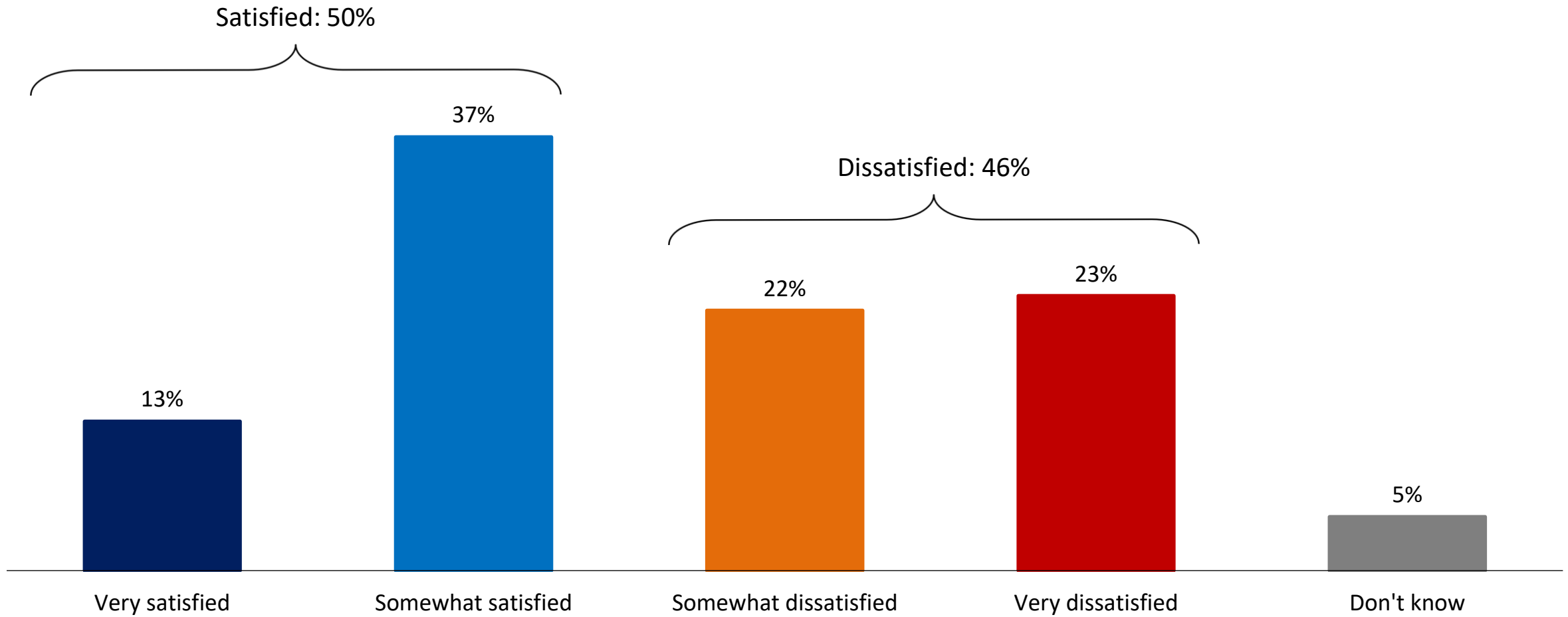
Current data: February 2025

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Government Approval

Ontario Government Approval: At 50%, slightly more respondents are satisfied with the Ontario government than unsatisfied
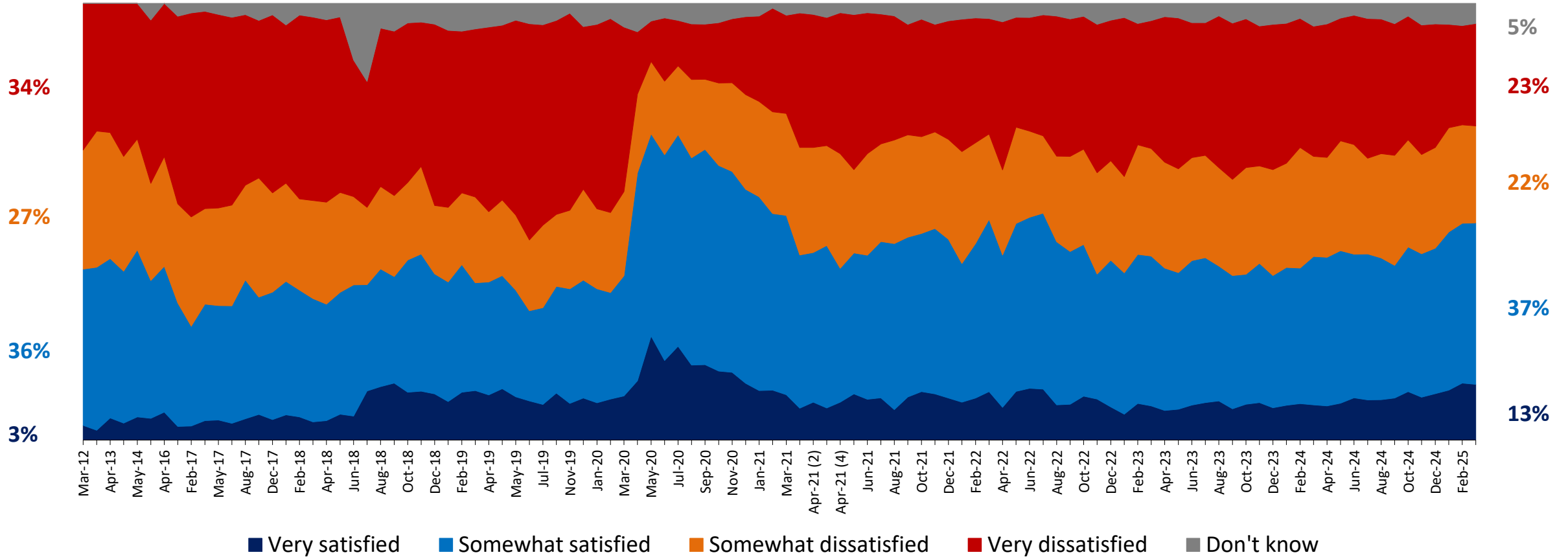
Satisfied: 50%

Dissatisfied: 46%

Very satisfied	Somewhat satisfied	Somewhat dissatisfied	Very dissatisfied	Don't know
13%	37%	22%	23%	5%

Current data: February 2025

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Government Approval Tracking: Government satisfaction similar to previous election

Q Generally speaking, how satisfied are you with the performance of the PROVINCIAL government in Ontario? Would you say you are...?
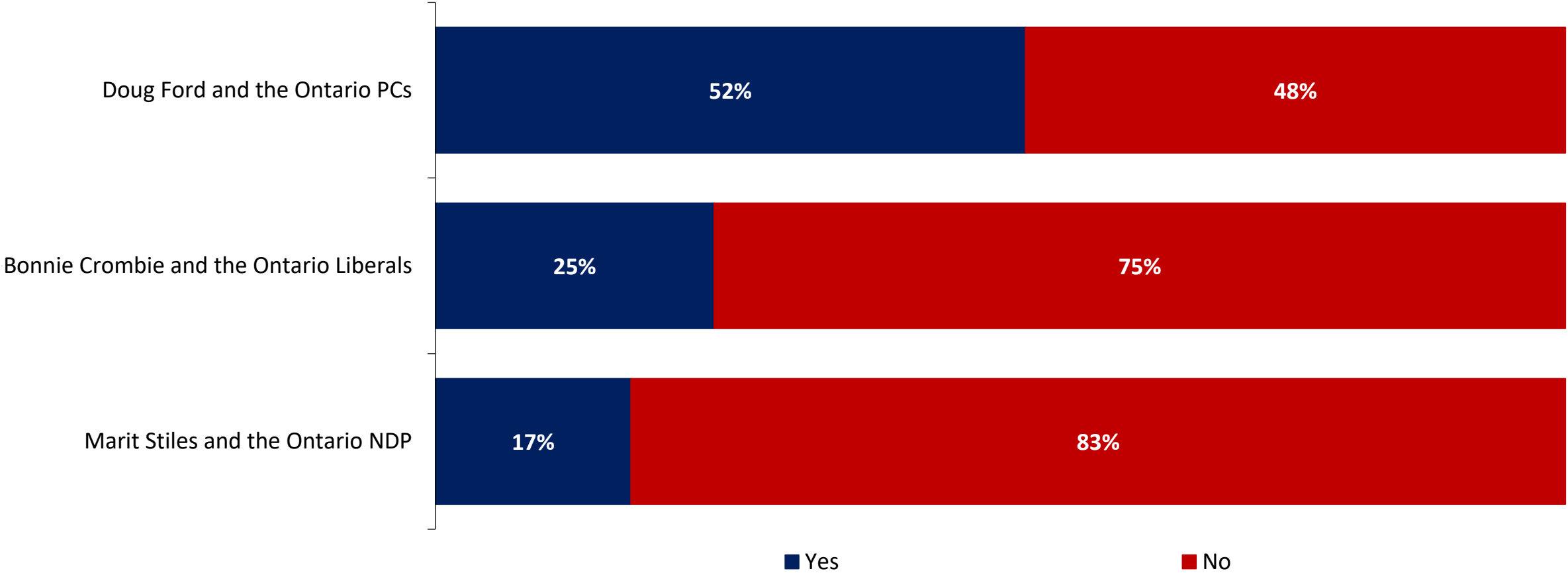[asked of all respondents; n=800]

Legend: Very satisfied | Somewhat satisfied | Somewhat dissatisfied | Very dissatisfied | Don't know

Left axis labels: 34%, 27%, 36%, 3%

Right axis labels: 5%, 23%, 22%, 37%, 13%

X-axis: Mar-12, Apr-13, May-14, Apr-16, Feb-17, May-17, Aug-17, Dec-17, Feb-18, Apr-18, Jun-18, Aug-18, Oct-18, Dec-18, Feb-19, Apr-19, May-19, Jul-19, Nov-19, Jan-20, Mar-20, May-20, Jul-20, Sep-20, Nov-20, Jan-21, Mar-21, Apr-21 (2), Apr-21 (4), Jun-21, Aug-21, Oct-21, Dec-21, Feb-22, Apr-22, Jun-22, Aug-22, Oct-22, Dec-22, Feb-23, Apr-23, Jun-23, Aug-23, Oct-23, Dec-23, Feb-24, Apr-24, Jun-24, Aug-24, Oct-24, Dec-24, Feb-25

Current data: February 2025

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Read, Seen, Heard

Campaign Attention: More than half (52%) have read, seen, or heard about Ford and the PCs, 25% have R/S/H about Crombie and the Liberals

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

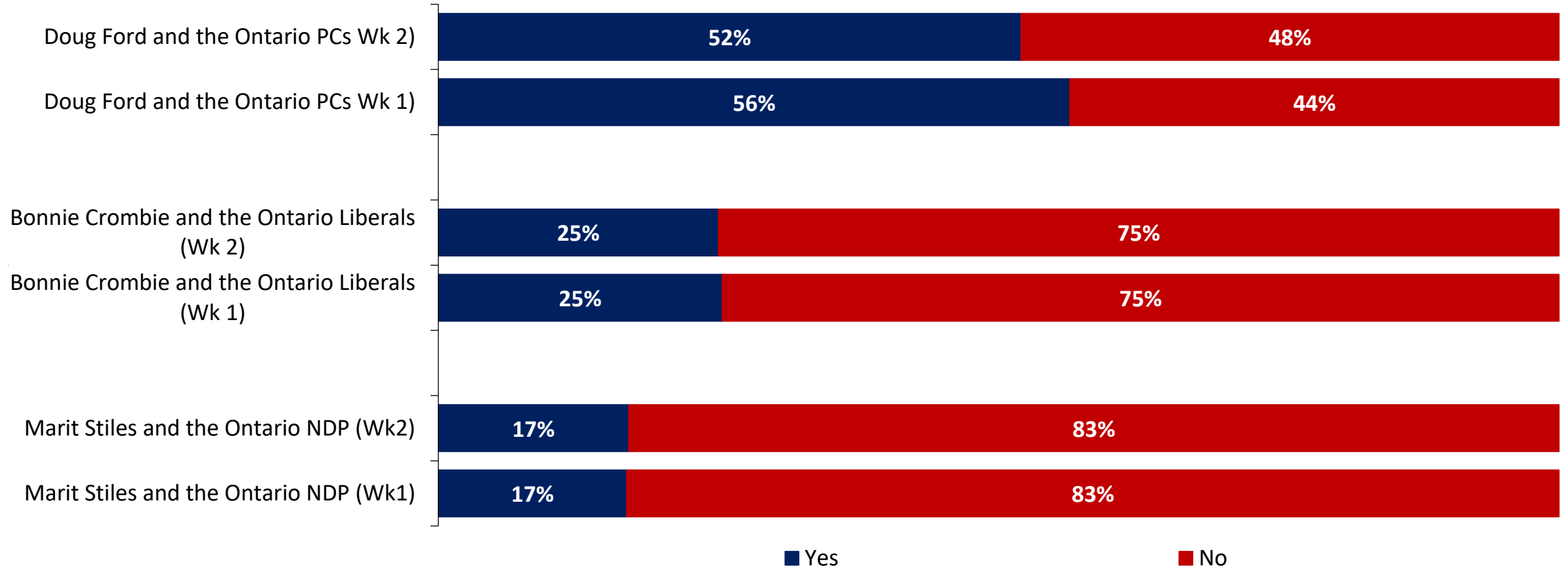|	Yes	No
Doug Ford and the Ontario PCs	52%	48%
Bonnie Crombie and the Ontario Liberals	25%	75%
Marit Stiles and the Ontario NDP	17%	83%

■ Yes   ■ No

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Campaign Attention: Just over half have read, seen, or heard about Ford and the PCs, 25% have R/S/H about Crombie and the Liberals

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

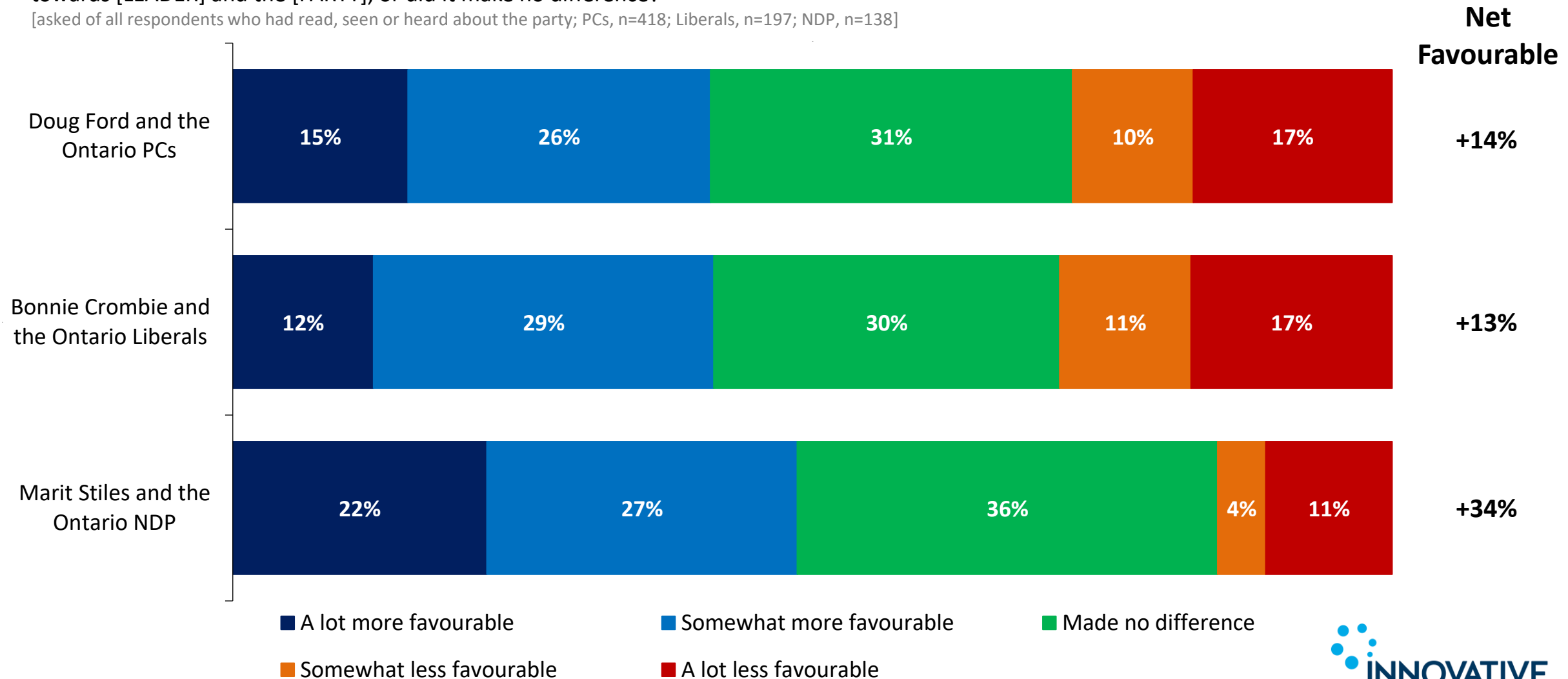|	Yes	No
Doug Ford and the Ontario PCs Wk 2)	52%	48%
Doug Ford and the Ontario PCs Wk 1)	56%	44%
Bonnie Crombie and the Ontario Liberals (Wk 2)	25%	75%
Bonnie Crombie and the Ontario Liberals (Wk 1)	25%	75%
Marit Stiles and the Ontario NDP (Wk2)	17%	83%
Marit Stiles and the Ontario NDP (Wk1)	17%	83%

■ Yes   ■ No

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RSH Impact: Those who R/S/H about Ford and the PCs or Crombie and the Liberals were left with divided impressions

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; PCs, n=418; Liberals, n=197; NDP, n=138]
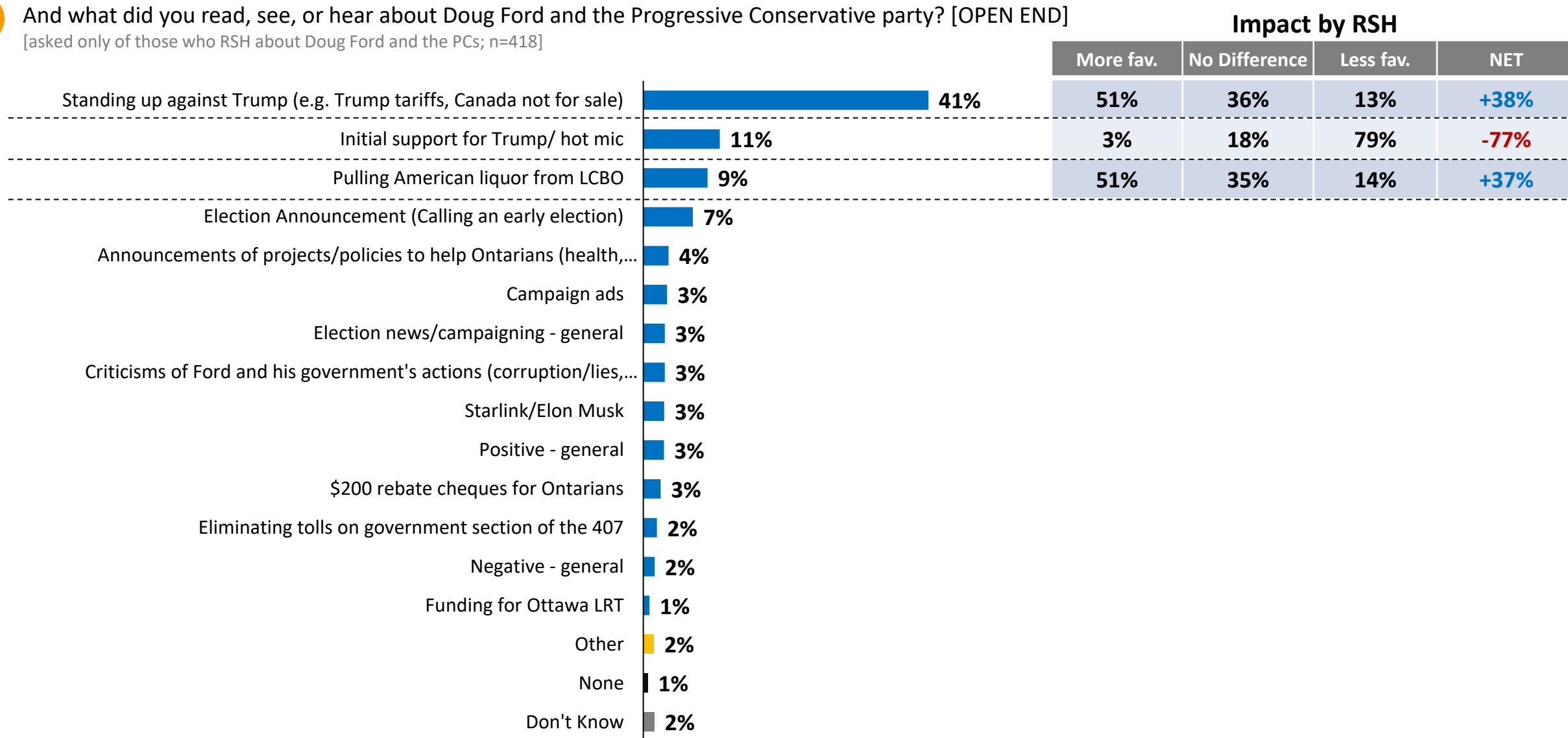
Net Favourable

	A lot more favourable	Somewhat more favourable	Made no difference	Somewhat less favourable	A lot less favourable	Net Favourable
Doug Ford and the Ontario PCs	15%	26%	31%	10%	17%	+14%
Bonnie Crombie and the Ontario Liberals	12%	29%	30%	11%	17%	+13%
Marit Stiles and the Ontario NDP	22%	27%	36%	4%	11%	+34%

- ■ A lot more favourable
- ■ Somewhat more favourable
- ■ Made no difference
- ■ Somewhat less favourable
- ■ A lot less favourable

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RSH PCs: Ford standing up to Trump is most mentioned and is viewed favourably, while his initial support for him is not

Q And what did you read, see, or hear about Doug Ford and the Progressive Conservative party? [OPEN END]
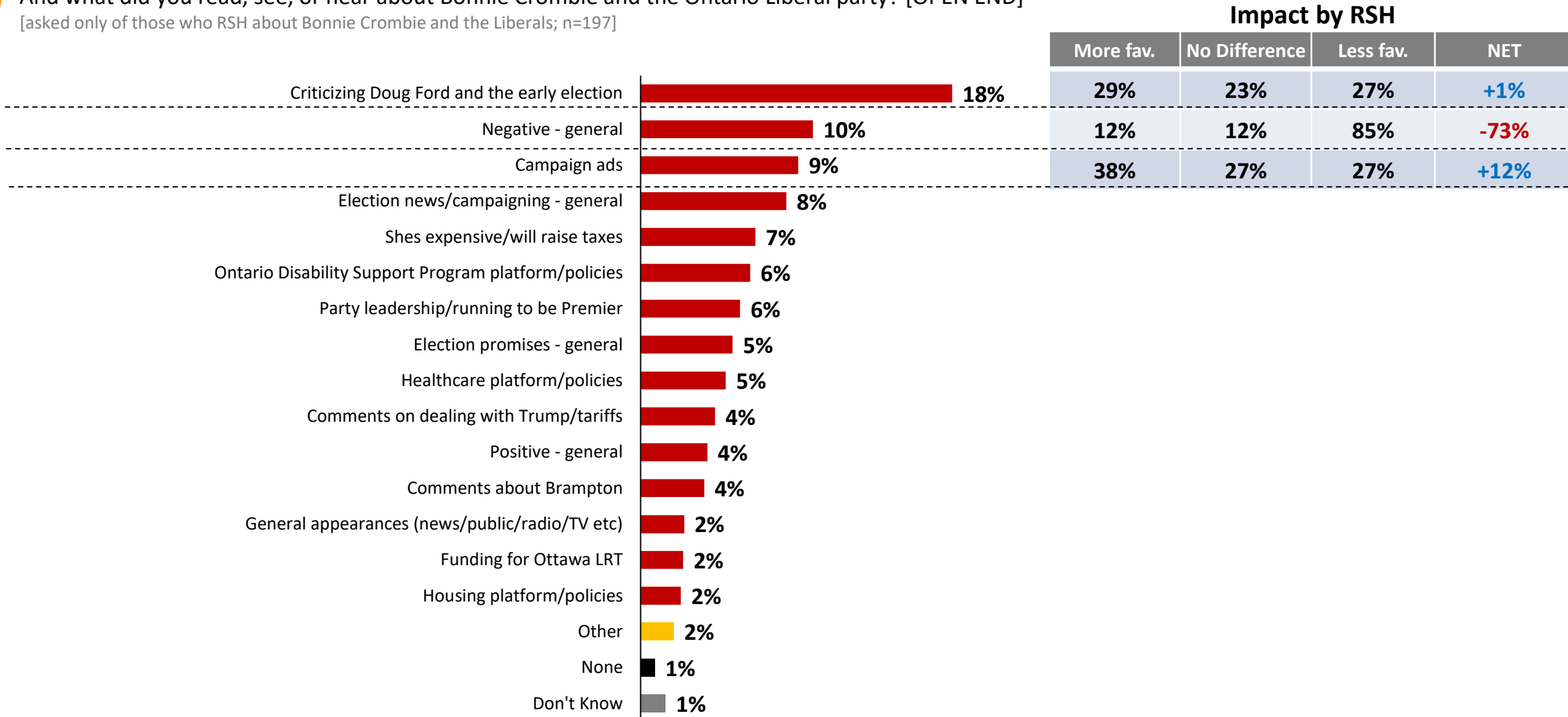[asked only of those who RSH about Doug Ford and the PCs; n=418]

	Standing up against Trump (e.g. Trump tariffs, Canada not for sale)	41%
	Initial support for Trump/ hot mic	11%
	Pulling American liquor from LCBO	9%
	Election Announcement (Calling an early election)	7%
	Announcements of projects/policies to help Ontarians (health,…	4%
	Campaign ads	3%
	Election news/campaigning - general	3%
	Criticisms of Ford and his government's actions (corruption/lies,…	3%
	Starlink/Elon Musk	3%
	Positive - general	3%
	$200 rebate cheques for Ontarians	3%
	Eliminating tolls on government section of the 407	2%
	Negative - general	2%
	Funding for Ottawa LRT	1%
	Other	2%
	None	1%
	Don't Know	2%

Impact by RSH

	More fav.	No Difference	Less fav.	NET
Standing up against Trump	51%	36%	13%	+38%
Initial support for Trump/ hot mic	3%	18%	79%	-77%
Pulling American liquor from LCBO	51%	35%	14%	+37%

Note: 'No response' (2%) not shown.

RSH Liberals: Top mention are Crombie's criticisms of Ford and the call for an early election, which leave respondents with divided impressions

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; n=197]

Impact by RSH

	More fav.	No Difference	Less fav.	NET
Criticizing Doug Ford and the early election — 18%	29%	23%	27%	+1%
Negative - general — 10%	12%	12%	85%	-73%
Campaign ads — 9%	38%	27%	27%	+12%

- Election news/campaigning - general — 8%
- Shes expensive/will raise taxes — 7%
- Ontario Disability Support Program platform/policies — 6%
- Party leadership/running to be Premier — 6%
- Election promises - general — 5%
- Healthcare platform/policies — 5%
- Comments on dealing with Trump/tariffs — 4%
- Positive - general — 4%
- Comments about Brampton — 4%
- General appearances (news/public/radio/TV etc) — 2%
- Funding for Ottawa LRT — 2%
- Housing platform/policies — 2%
- Other — 2%
- None — 1%
- Don't Know — 1%

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

RSH New Democrats: Top mention for Stiles is election promises, which nets very favourable impressions

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; n=138]

Impact by RSH

	More fav.	No Difference	Less fav.	NET
Election promises - general — **15%**	78%	19%	3%	+75%
Criticizing Doug Ford and the early election — **12%**	47%	44%	10%	+37%

Category	%
Election promises - general	15%
Criticizing Doug Ford and the early election	12%
Election news/campaigning - general	11%
Eliminating tolls/buying back 407	9%
Party leadership/running to be Premier	9%
Education platform/policies	8%
Positive - general	5%
Negative - general	5%
General appearances (news/public/radio/TV etc)	5%
Campaign ads	4%
Homelessness platform/policies	3%
Trump/Tariff threats	3%
Other	3%
None	5%
Don't Know	3%

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

Provincial Vote

Likelihood to Vote: Majority of respondents say they will definitely vote in the upcoming election

Q As you may have heard there is going to be a provincial election on February 27th of this year. How likely are you to vote in the upcoming Ontario provincial election?

[asked of all respondents; n=800]

Definitely	Very likely	Somewhat likely	Not very likely	Definitely will not vote	Don't Know
57%	21%	12%	3%	3%	5%

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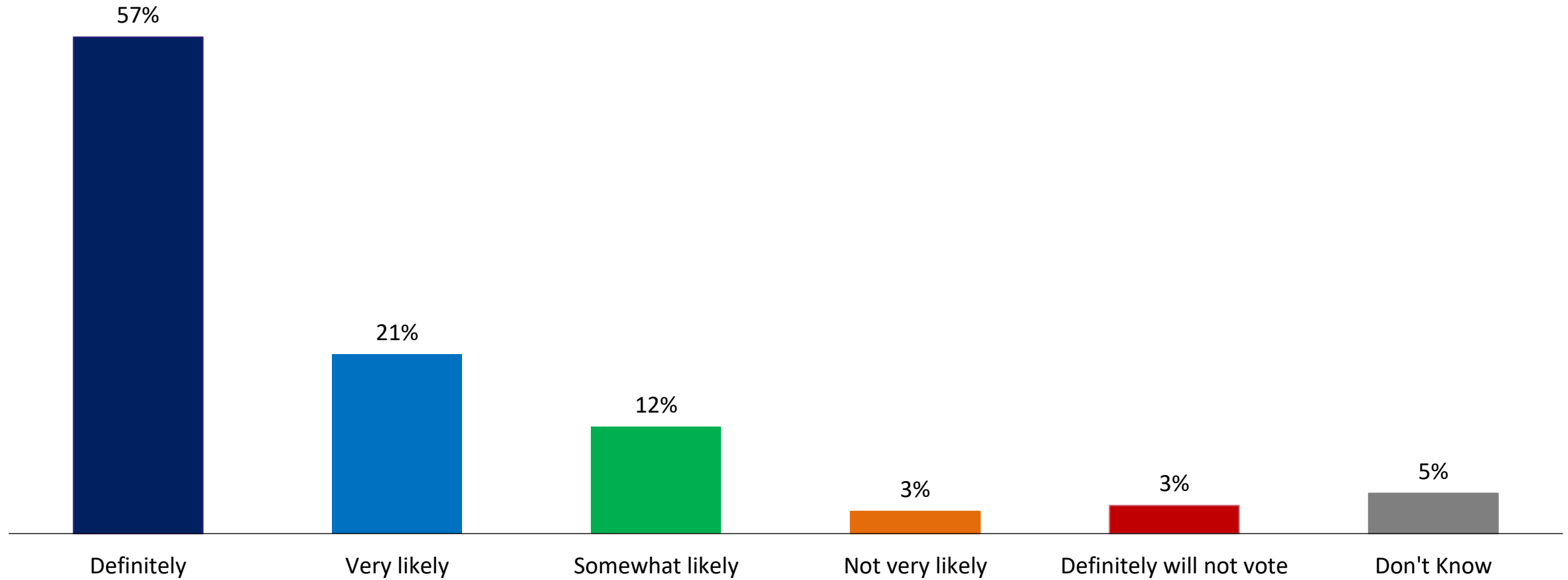
Provincial Combined Vote: At 43%, the Progressive Conservatives lead the Liberals by 23 points

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

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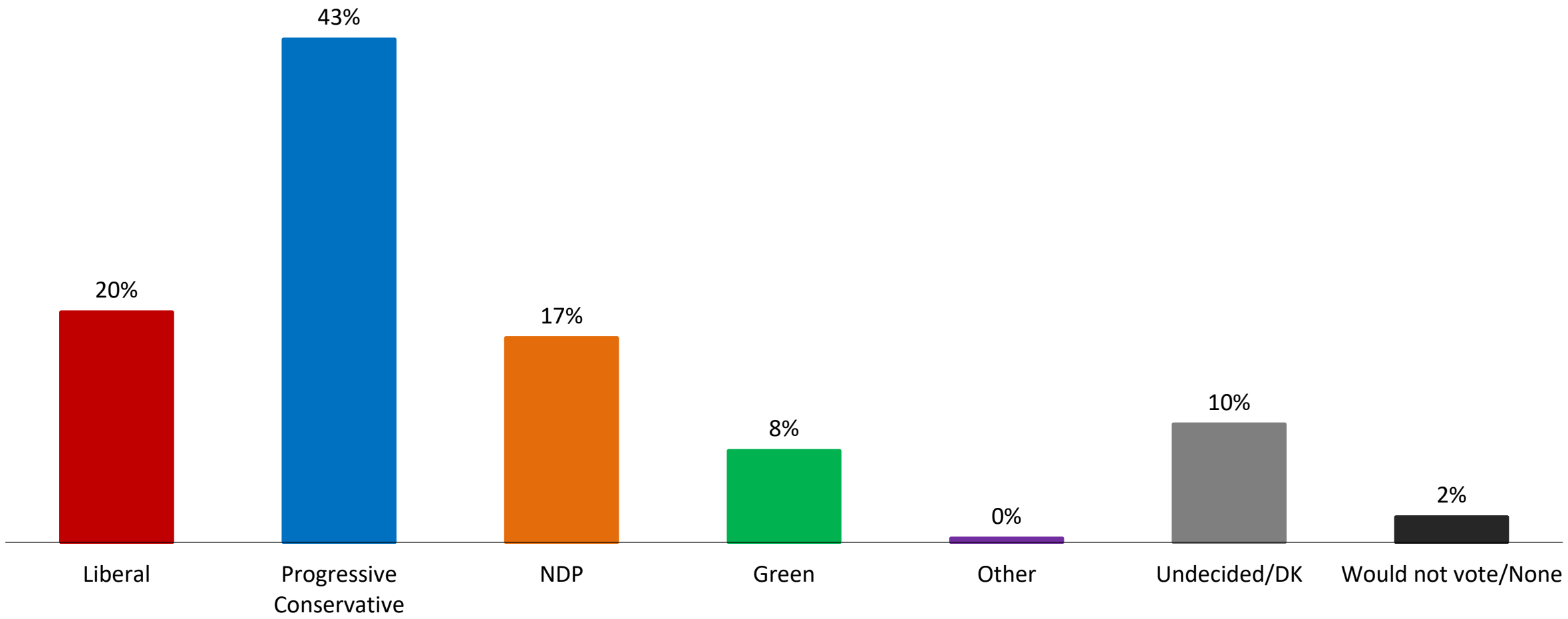
Provincial Vote Tracking: The Progressive Conservatives continue to hold a comfortable lead over the other parties

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]
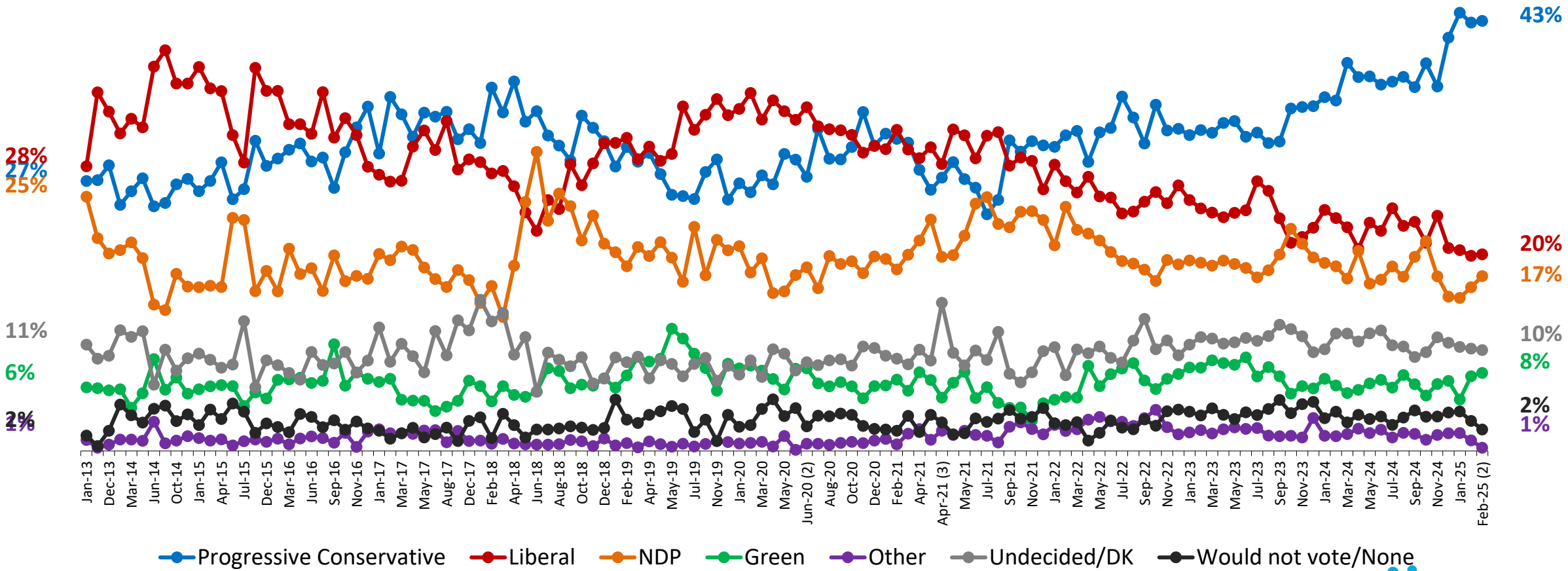
Legend: Progressive Conservative — Liberal — NDP — Green — Other — Undecided/DK — Would not vote/None

Current data: February 2025

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Combined Vote by Value Cluster: Progressive Conservatives lead in all value clusters except Core Left where the NDP lead

Value Clusters

Provincial Combined Vote	Populist Conservatives (N=87)	Deferential Conservatives (N=65)	Business Liberals (N=181)	Left Liberals (N=154)	Core Left (N=122)	Pay-as-you-go Moderates (N=191)
Liberal	4%	19%	24%	18%	29%	18%
Progressive Conservative	77%	52%	47%	41%	19%	37%
NDP	8%	14%	15%	24%	28%	13%
Green	3%	7%	5%	9%	13%	9%
Other	2%	0%	0%	0%	0%	1%
Undecided/DK	7%	8%	10%	7%	7%	17%
Would not vote/None	0%	0%	0%	1%	4%	5%

Current data: February 2025

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Combined Vote by Economic Gap: PCs lead in all economic segments; Liberals perform best among Strugglers, NDP among Alienated

Economic Gap

Provincial Combined Vote	Achievers (N=189)	Strugglers (N=254)	Ambivalent (N=174)	Alienated (N=183)
Liberal	21%	22%	15%	19%
Progressive Conservative	53%	50%	35%	30%
NDP	11%	18%	18%	22%
Green	7%	5%	8%	12%
Other	1%	0%	0%	0%
Undecided/DK	6%	5%	16%	15%
Would not vote/None	0%	0%	7%	1%

Current data: February 2025

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Combined Vote by Time for Change: 6-in-10 of the 'Time for a change government' segment would still vote Progressive Conservatives

Time for Change

	Core Government	Soft Government	Time for a change Government	Uncertain	Soft anti-Government	Hostile
	(N=140)	(N=66)	(N=172)	(N=65)	(N=215)	(N=142)
Liberal	0%	5%	17%	14%	25%	43%
Progressive Conservative	99%	78%	58%	28%	14%	3%
NDP	0%	1%	12%	11%	28%	36%
Green	0%	3%	10%	5%	12%	10%
Other	0%	0%	1%	0%	0%	1%
Undecided/DK	0%	13%	3%	29%	19%	6%
Would not vote/None	0%	0%	1%	13%	2%	2%

Provincial Combined Vote

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Combined Vote by Ford Segment: PCs have nearly half (49%) of the Non-PC Ford personal supporter vote, Liberals have 22%

Ford Segment

Provincial Combined Vote	Core PCs (n=274)	Non-PC Ford Personal Supporters (n=130)	Unaligned (n=124)	Other Supporters (n=271)
Liberal	4%	18%	10%	40%
Progressive Conservative	87%	56%	10%	7%
NDP	3%	14%	15%	34%
Green	3%	7%	7%	13%
Other	1%	0%	0%	0%
Undecided/DK	2%	4%	46%	5%
Would not vote/None	0%	1%	12%	0%

Current data: February 2025

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Provincial Decided Vote: Nearly half are decided on voting for the Progressive Conservatives, Liberals at 22%, NDP at 20%

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=703]

Liberal	Progressive Conservative	NDP	Green	Other
22%	49%	20%	9%	0%

Current data: February 2025

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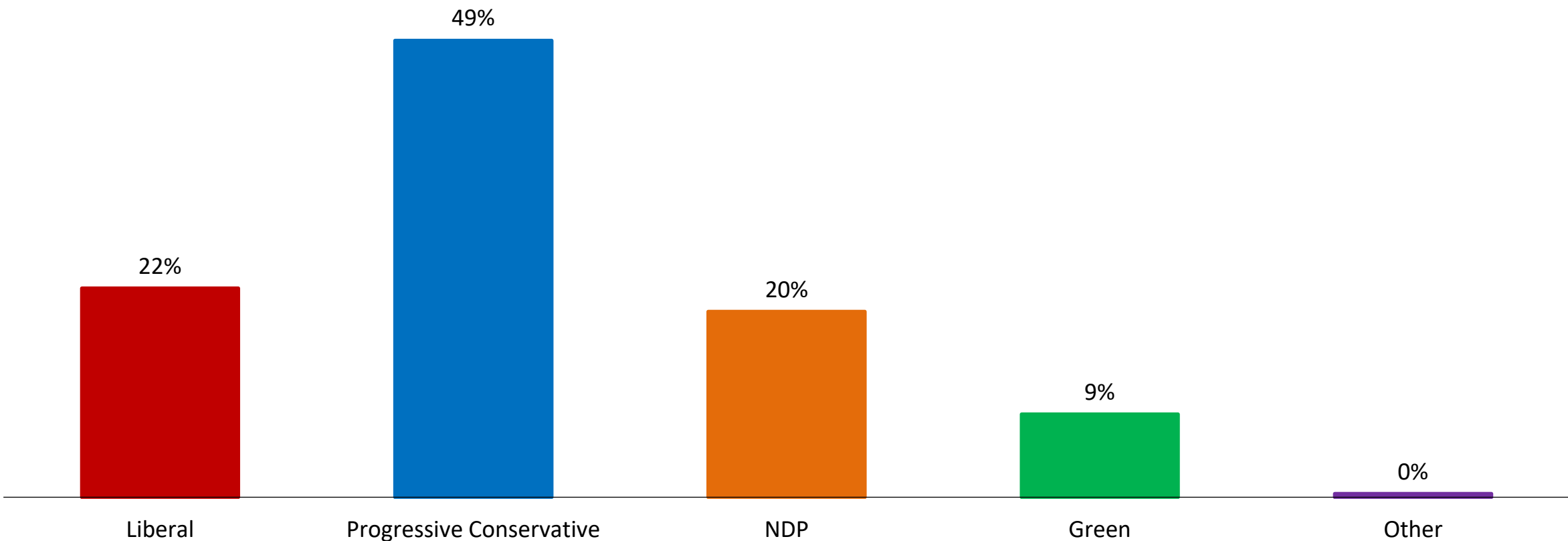
Provincial Decided Vote Tracking: Progressive Conservatives maintain their strong lead over the other parties on decided vote

Current data: February 2025
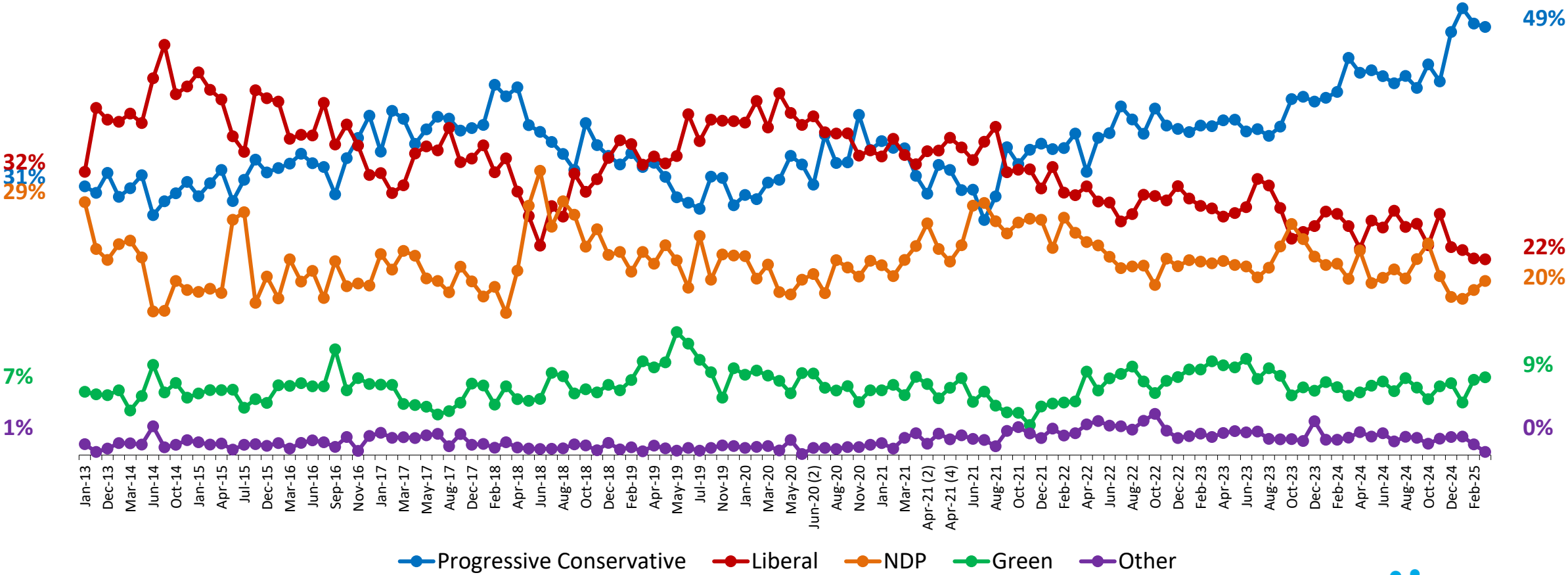
Decided Vote by Likelihood to Vote: PCs lead both definite and probable voters, with half, or close to half, the vote

Decided Vote by Likelihood to Vote

| | Likelihood to Vote | |
Decided Vote	Definite Voters	Probable Voters
	(N=434)	(N=235)
Liberal	25%	17%
Progressive Conservative	50%	48%
NDP	18%	23%
Green	6%	12%
Other	0%	0%

Note: Unlikely voters not shown due to small sample size.

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Satisficing: Just under half (49%) of respondents would like to hear more before they make up their mind in this election

Q Which statement is closest to your view about the upcoming election?
[asked of all respondents; n=800]

W2	44%	49%	7%
W1	45%	49%	7%

■ I have heard all I need to make up my mind in this election
■ I would like to hear more before I finally make up my mind in this election
■ Don't Know

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Firmness of Vote: PC voters appear most firm in their vote choice, followed by the Liberals

Which statement is closest to your view about the upcoming election BY Combined Vote [Vote+Lean]

	Combined Vote			
	Liberal	**Progressive Conservative**	**NDP**	**Green**
	(N=157)	(N=342)	(N=139)	(N=62)
I have heard all I need to make up my mind in this election	45%	57%	35%	38%
I would like to hear more before I finally make up my mind in this election	54%	39%	63%	59%
Don't know	2%	4%	2%	2%

Satisficing

Note: 'Other' in Combined Vote not shown due to insufficient sample size.
Current data: February 2025

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Provincial Party ID: A plurality of respondents identify as a Progressive Conservative (34%), while 1-in-4 (25%) identify as a Liberal

Q Thinking about politics in Ontario, generally speaking, do you usually think of yourself as a…
[asked of all respondents; n=800]

Liberal	Progressive Conservative	NDP	Green	Other	None/Independent	Don't know
25%	34%	13%	6%	1%	16%	5%

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Current data: February 2025
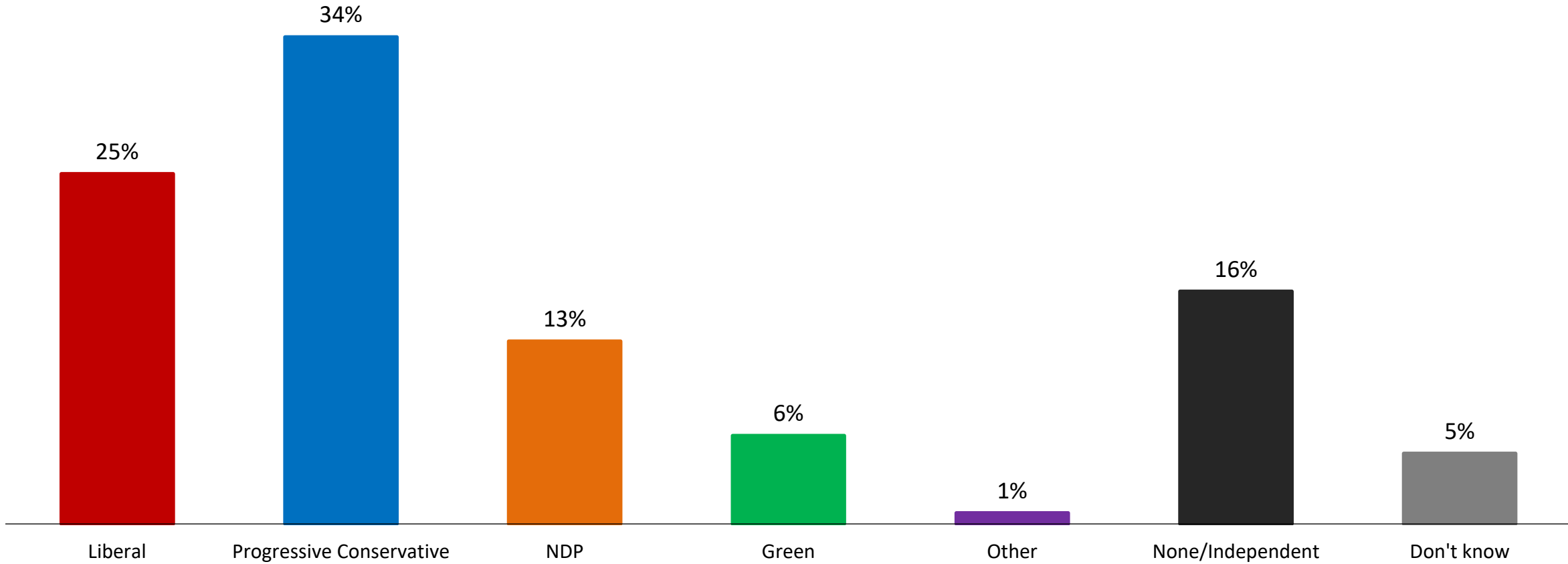
Combined Vote by Party ID: The PCs and NDP are more successfully rallying their base than the Liberals

Provincial Party Identification

Provincial Combined Vote	Liberal (N=197)	Progressive Conservative (N=274)	NDP (N=103)	Green (N=50)	Other (N=6)	Unaligned (N=170)
Liberal	60%	4%	7%	12%	22%	7%
Progressive Conservative	17%	87%	9%	18%	54%	29%
NDP	10%	3%	80%	9%	8%	14%
Green	6%	3%	3%	58%	9%	6%
Other	0%	1%	0%	0%	7%	0%
Undecided/DK	7%	2%	1%	1%	0%	35%
Would not vote/None	0%	0%	0%	2%	0%	9%

Note: Current data: February 2025

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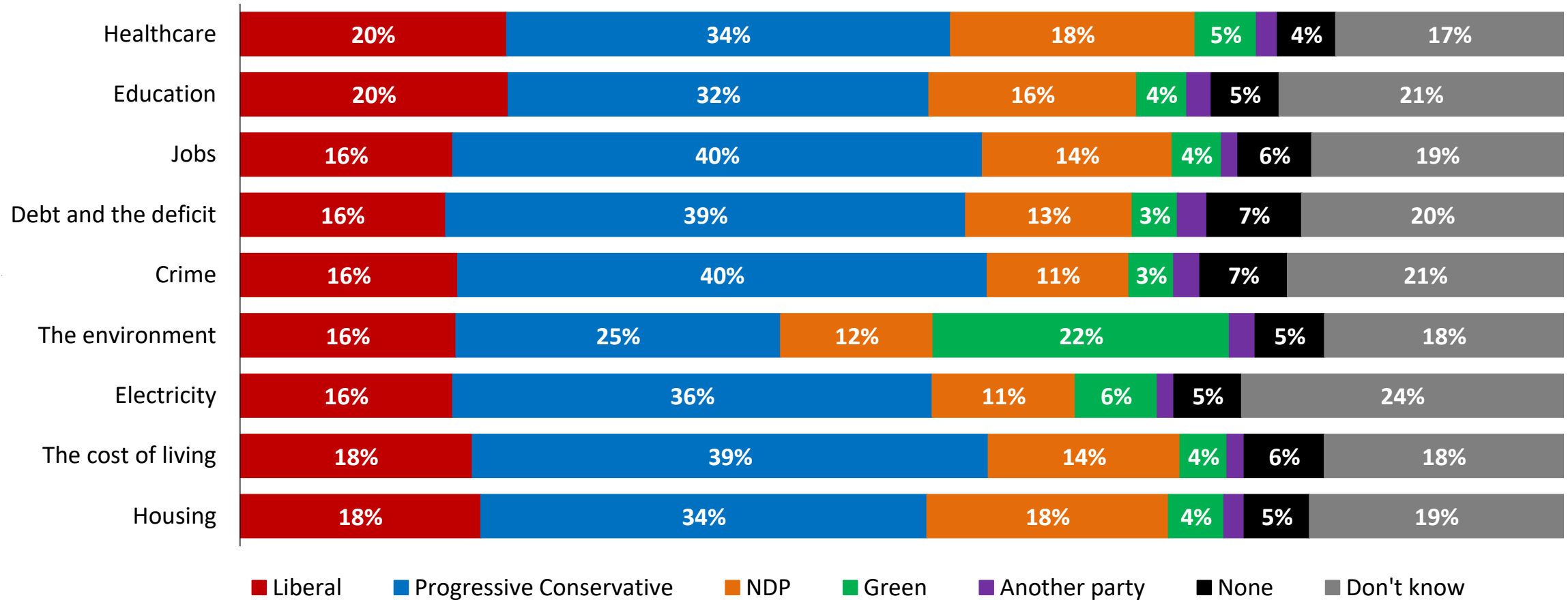RESEARCH GROUP

Party Attributes: PCs lead in all issues

Q For each of the following issues, please indicate which party you think would do the best job of dealing with that issue or if you think none of the parties would do a good job on that issue.
[asked of all respondents; n=800]

| Issue	Liberal	Progressive Conservative	NDP	Green	Another party	None	Don't know
Healthcare	20%	34%	18%	5%		4%	17%
Education	20%	32%	16%	4%		5%	21%
Jobs	16%	40%	14%	4%		6%	19%
Debt and the deficit	16%	39%	13%	3%		7%	20%
Crime	16%	40%	11%	3%		7%	21%
The environment	16%	25%	12%	22%		5%	18%
Electricity	16%	36%	11%	6%		5%	24%
The cost of living	18%	39%	14%	4%		6%	18%
Housing	18%	34%	18%	4%		5%	19%

Legend: ■ Liberal ■ Progressive Conservative ■ NDP ■ Green ■ Another party ■ None ■ Don't know

Current data: February 2024

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Leadership Favourables

Leader Favourables: Ford leads favourables at 43%; 16% have a very favourable impression of Ford

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.
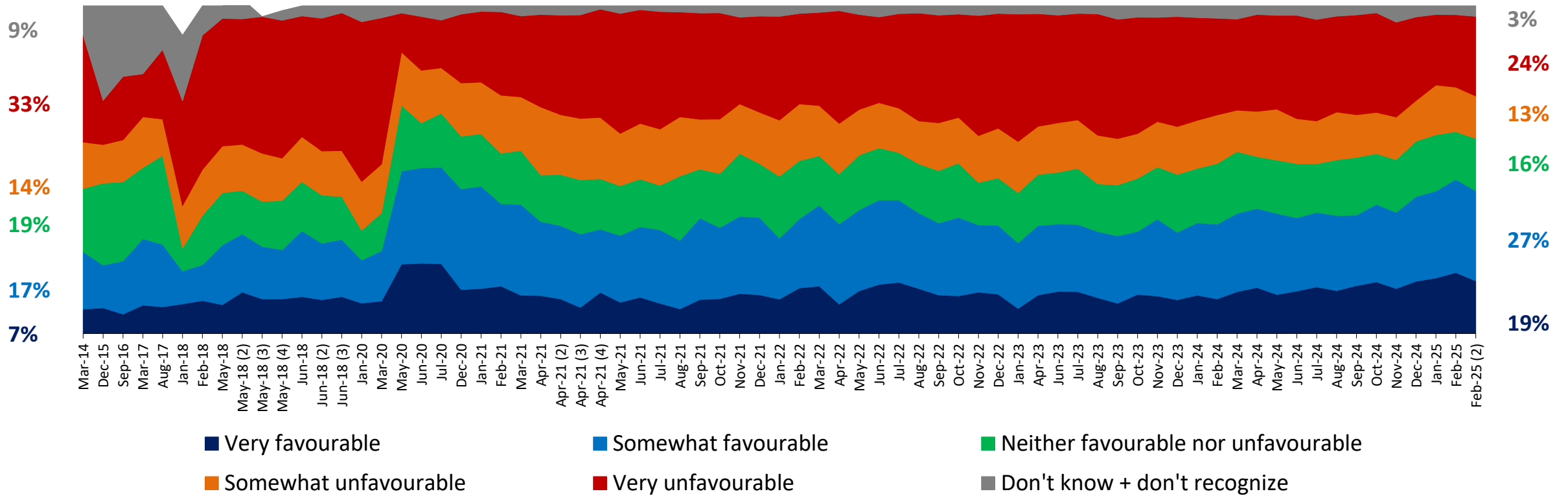
[asked of all respondents; n=800]

	Very favourable	Somewhat favourable	Neutral/Neither favourable nor unfavourable	Somewhat unfavourable	Very unfavourable	Do not recognize	Don't know
Bonnie Crombie	10%	23%	23%	14%	19%	4%	6%
Doug Ford	16%	27%	16%	13%	24%		3%
Marit Stiles	11%	22%	26%	12%	13%	7%	9%
Mike Schreiner	8%	20%	35%	9%	9%	8%	11%

■Very favourable ■Somewhat favourable ■Neutral/Neither favourable nor unfavourable ■Somewhat unfavourable ■Very unfavourable ■Do not recognize ■Don't know

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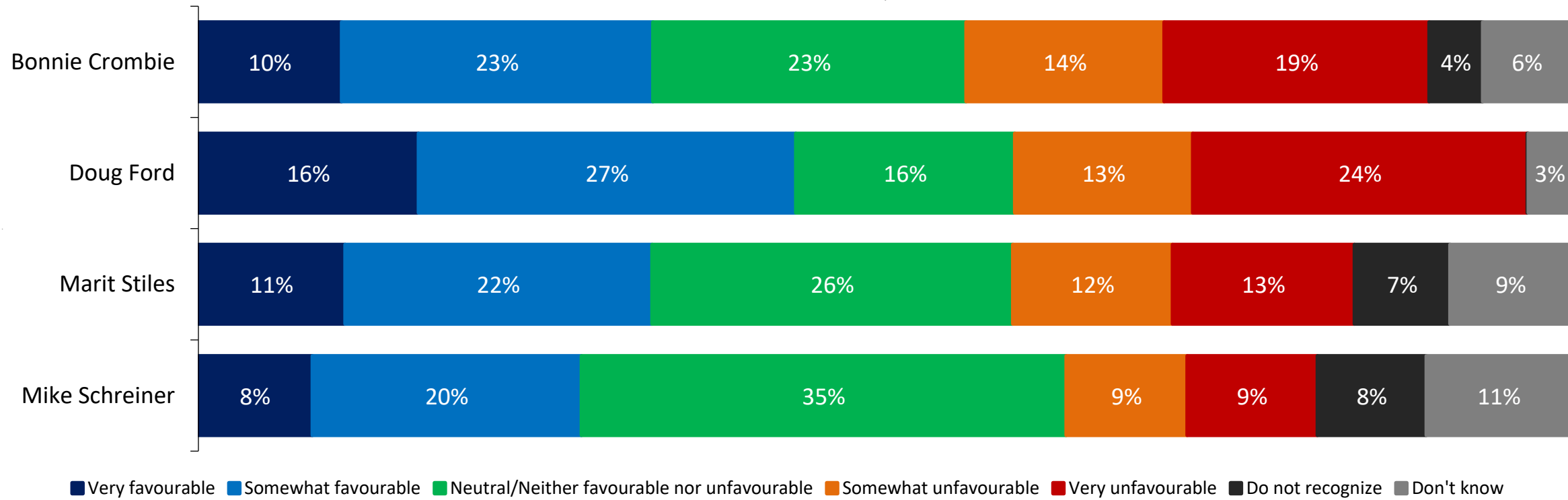
Ontario Liberal Leader Favourability: Bonnie Crombie sees slight increase in favourability

Legend:
- Very favourable
- Somewhat favourable
- Neither favourable nor unfavourable
- Somewhat unfavourable
- Very unfavourable
- Don't know + don't recognize

Left axis values (top to bottom): 9%, 21%, 12%, 16%, 25%, 16%

Right axis values (top to bottom): 10%, 19%, 14%, 23%, 23%, 10%

Current data: February 2025

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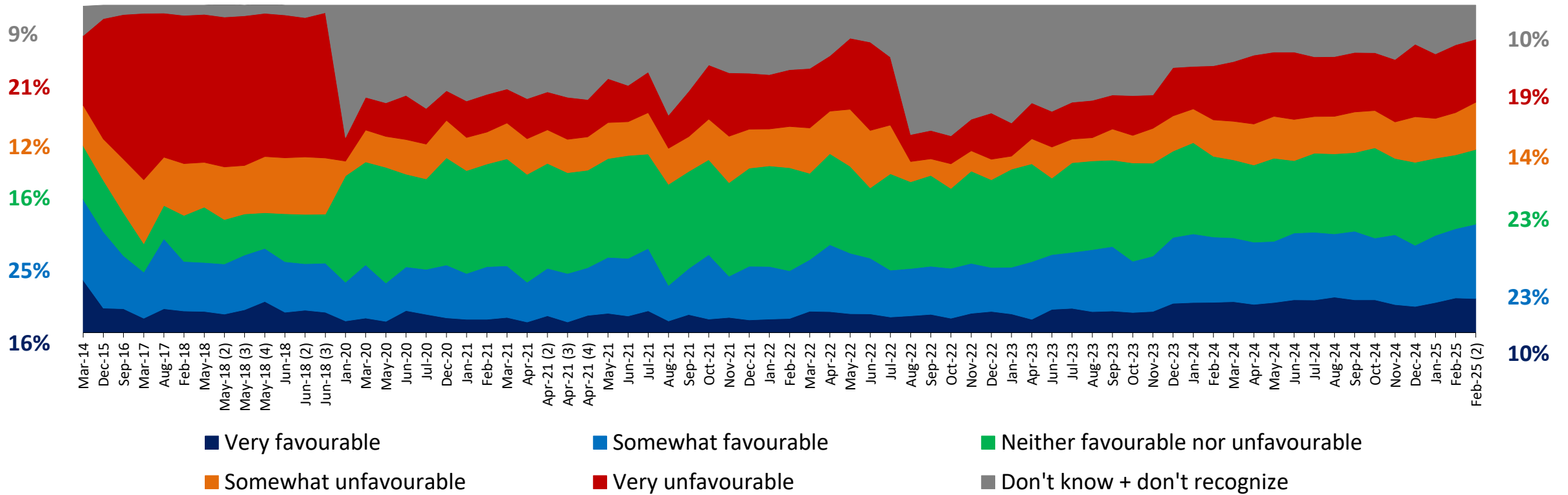
Ontario PC Leader Favourability: Doug Ford's favourability is down slightly since the first week of February

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]

Legend:
- Very favourable
- Somewhat favourable
- Neither favourable nor unfavourable
- Somewhat unfavourable
- Very unfavourable
- Don't know + don't recognize

Left axis labels: 9%, 33%, 14%, 19%, 17%, 7%

Right axis labels: 3%, 24%, 13%, 16%, 27%, 19%

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Ontario NDP Leader Favourability: While more respondents recognize the leader than in recent years, favourability remains largely stagnant

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.
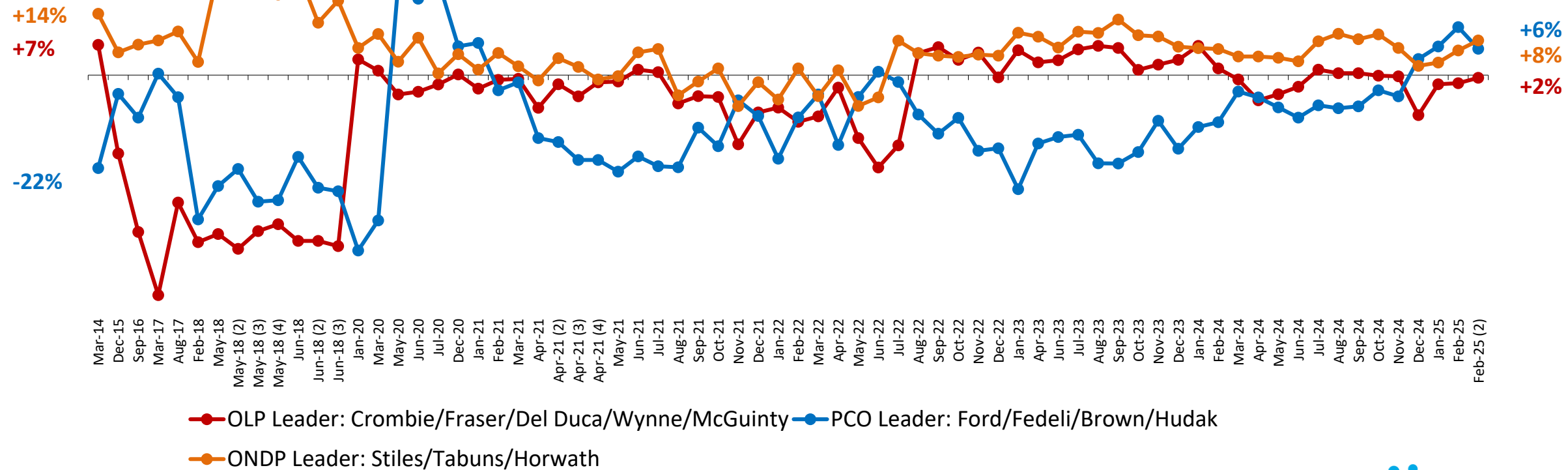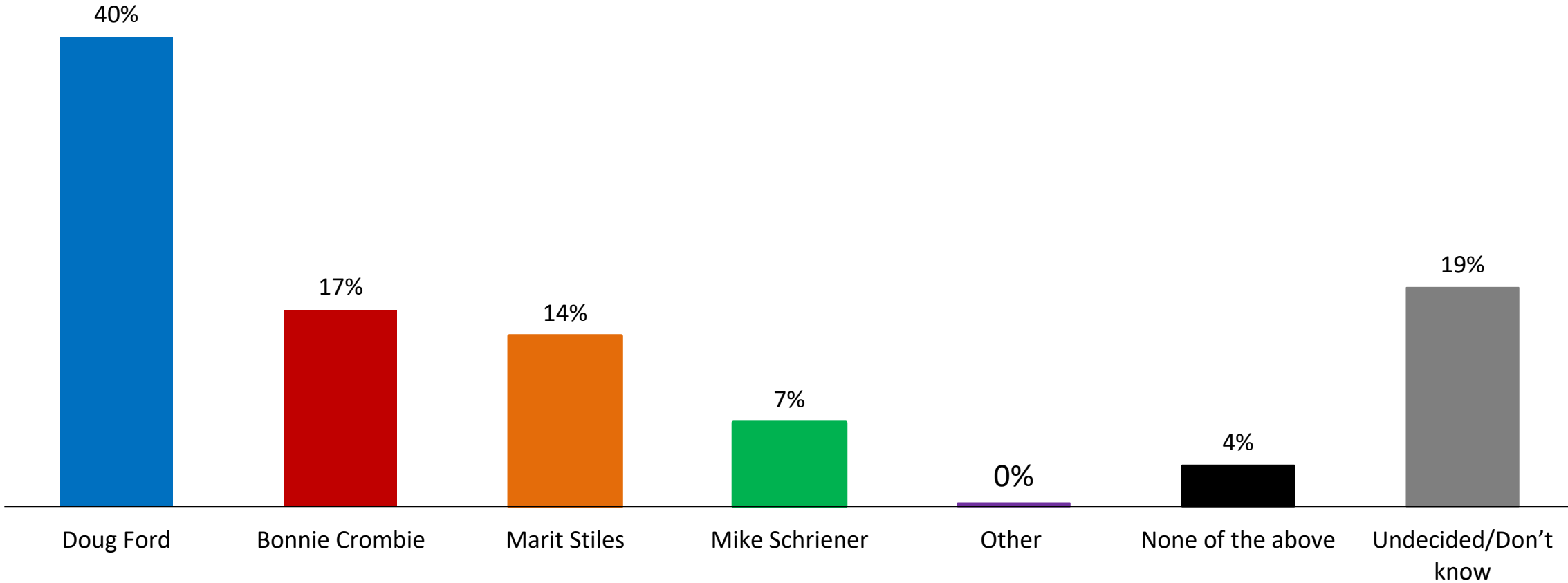
[asked of all respondents; n=800]

Legend:
- Very favourable
- Somewhat favourable
- Neither favourable nor unfavourable
- Somewhat unfavourable
- Very unfavourable
- Don't know + don't recognize

Left axis values (top to bottom): 11%, 12%, 13%, 26%, 27%, 12%
Right axis values (top to bottom): 16%, 13%, 12%, 26%, 22%, 11%

Current data: February 2025

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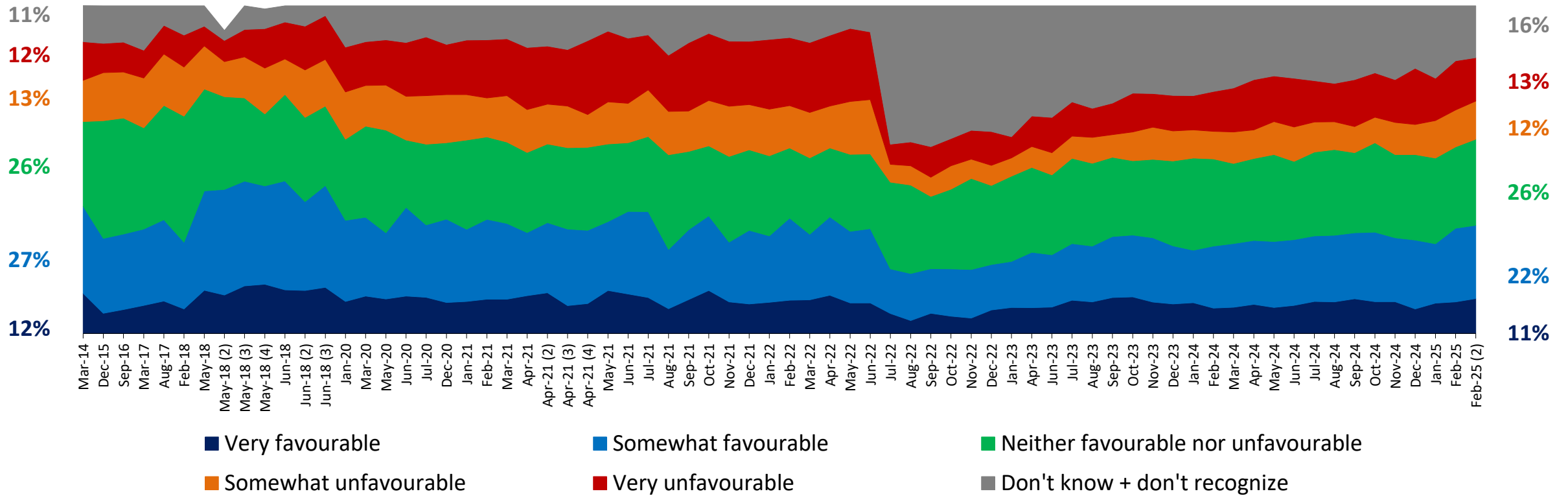
Ontario Party Leader NET Favourables Tracking: Ford sees a decline in net favourability, down 5 points

OLP Leader: Crombie/Fraser/Del Duca/Wynne/McGuinty

PCO Leader: Ford/Fedeli/Brown/Hudak

ONDP Leader: Stiles/Tabuns/Horwath

Current data: February 2025

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Best Premier Tracking: Ford has built his strong lead as best premier since undecided peaked in January 2023

Q Which of the following leaders would make the best Premier of [PROV]?
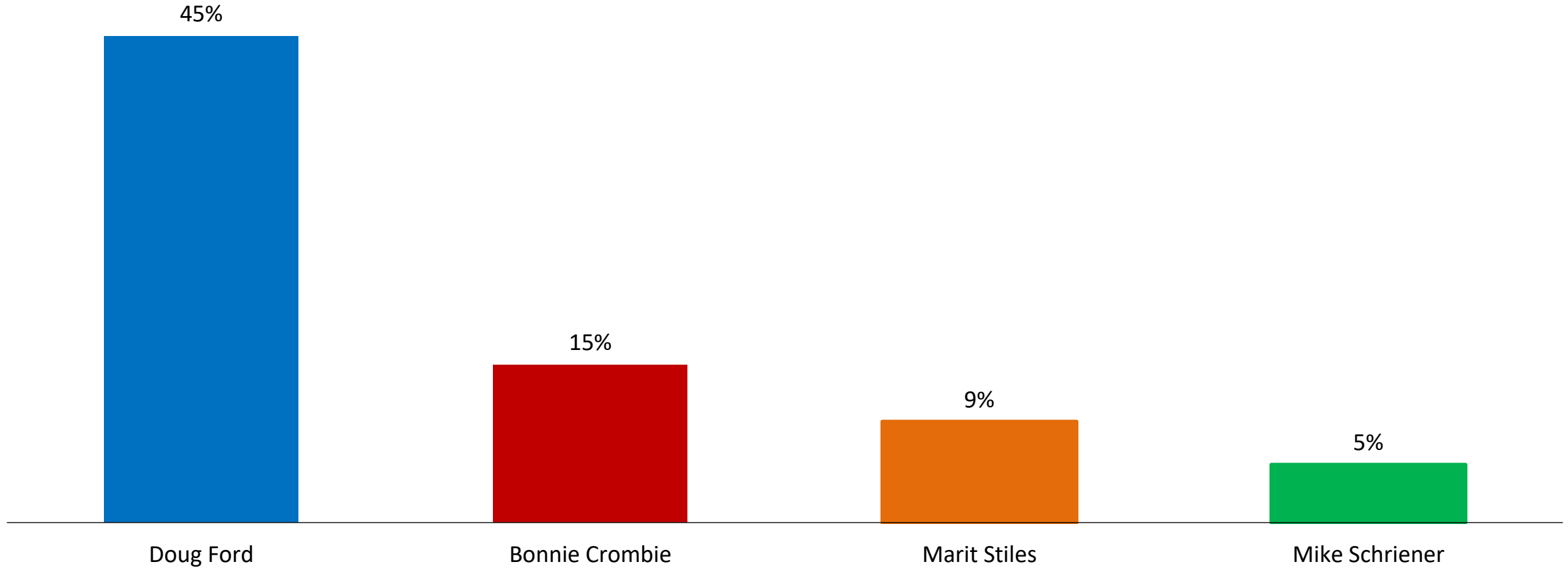[asked of all respondents; n=800]

Legend:
- Crombie/Fraser/Del Duca/Wynne/McGuinty (red)
- Ford/Fedeli/Brown/Hudak (blue)
- Stiles/Tabuns/Horwath (orange)
- Other (purple)
- None of the above (black)
- Undecided/Don't know (grey)

Left axis labels: 26%, 21%, 20%, 19%, 11%, 1%

Right axis labels: 40%, 19%, 17%, 14%, 7%, 4%

X-axis: Dec-12, Jan-13, Jun-13, Aug-13, Mar-14, Dec-15, Sep-16, Mar-17, Aug-17, Feb-18, May-18, May-18 (2), May-18 (3), May-18 (4), Jun-18, Jun-18 (2), Jun-18 (3), Jan-20, May-20, Jun-20, Jul-20, Dec-20, Jan-21, Feb-21, Mar-21, Apr-21, Apr-21 (2), Apr-21 (3), Apr-21 (4), May-21, Jun-21, Jul-21, Aug-21, Sep-21, Oct-21, Nov-21, Dec-21, Jan-22, Feb-22, Mar-22, Apr-22, May-22, Jun-22, Jul-22, Aug-22, Sep-22, Oct-22, Nov-22, Dec-22, Jan-23, Apr-23, Jan-24, Mar-24, Apr-24, May-24, Jun-24, Jul-24, Aug-24, Sep-24, Oct-24, Nov-24, Dec-24, Jan-25, Feb-25, Feb-25 (2)

Current data: February 2025

Best Leader to Deal With Trump: At 45%, Ford is considered the best leader to respond to the tariff threats

Q Which of the following leaders would be best suited to respond to the tariff threats posed by US President Donald Trump?
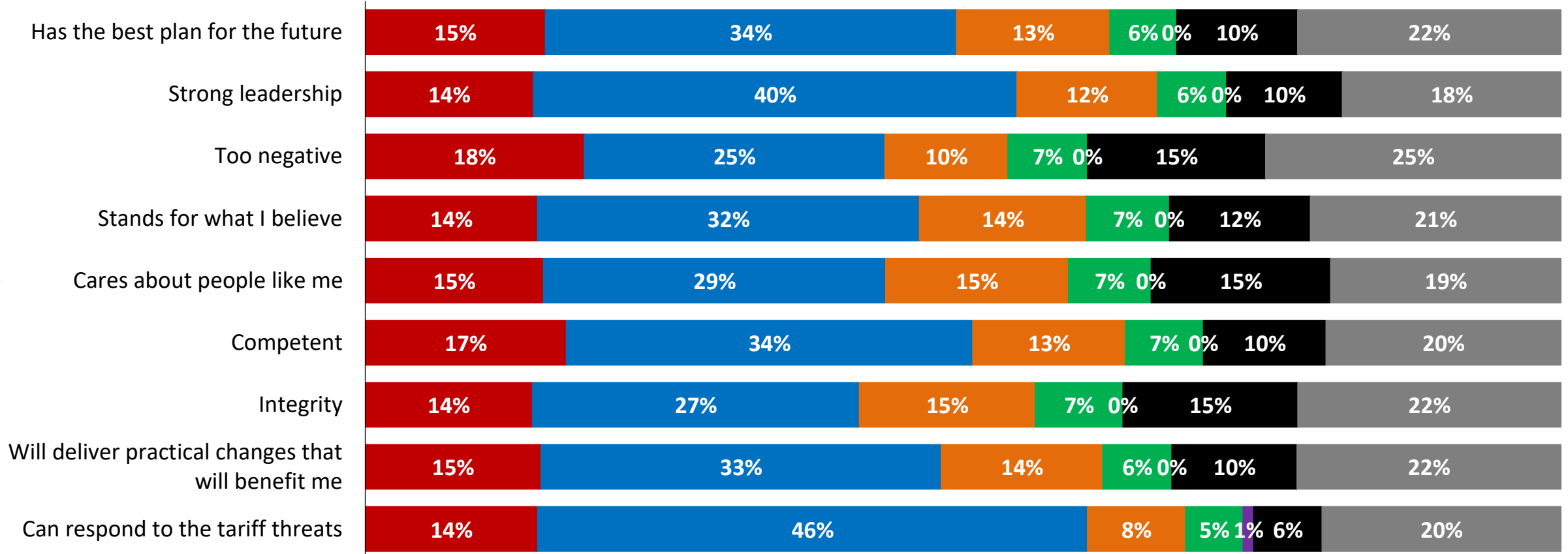[decided voters only; n=800]

Doug Ford	Bonnie Crombie	Marit Stiles	Mike Schriener
45%	15%	9%	5%

Current data: February 2025

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Leader Attributes: Ford outperforms opponents in all attributes, particularly on 'strong leadership' and 'can respond to tariffs'

Q Now we would like you to read a list of different words or phrases that describe some political leaders. For each word or phrase, please indicate who it BEST describes.
[asked of all respondents; n=800]

Attribute	Bonnie Crombie	Doug Ford	Marit Stiles	Mike Schreiner	Other	None	Undecided
Has the best plan for the future	15%	34%	13%	6%	0%	10%	22%
Strong leadership	14%	40%	12%	6%	0%	10%	18%
Too negative	18%	25%	10%	7%	0%	15%	25%
Stands for what I believe	14%	32%	14%	7%	0%	12%	21%
Cares about people like me	15%	29%	15%	7%	0%	15%	19%
Competent	17%	34%	13%	7%	0%	10%	20%
Integrity	14%	27%	15%	7%	0%	15%	22%
Will deliver practical changes that will benefit me	15%	33%	14%	6%	0%	10%	22%
Can respond to the tariff threats	14%	46%	8%	5%	1%	6%	20%

Legend:
- Bonnie Crombie, leader of the Ontario Liberal Party
- Doug Ford, leader of the Ontario PC Party
- Marit Stiles, leader of the Ontario NDP
- Mike Schreiner, leader of the Ontario Green Party
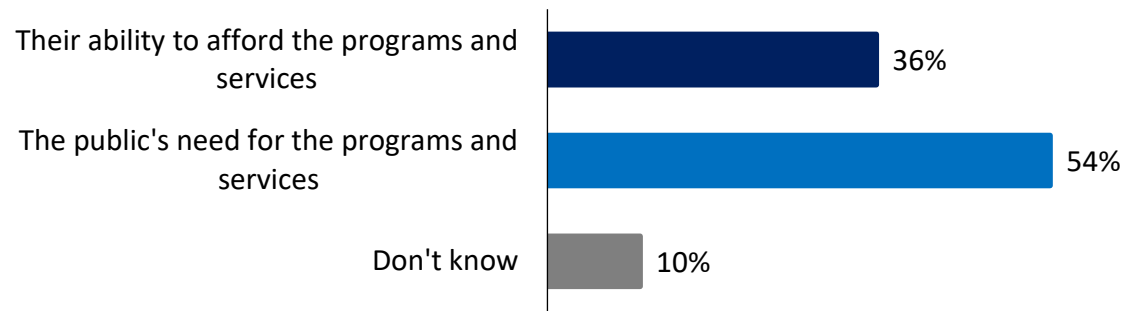- Other
- None
- Undecided

Current data: February 2025
Note: 'Other' only provided as an option for the question "Which of the following leaders would be best suited to respond to the tariff threats posed by US President Donald Trump?"
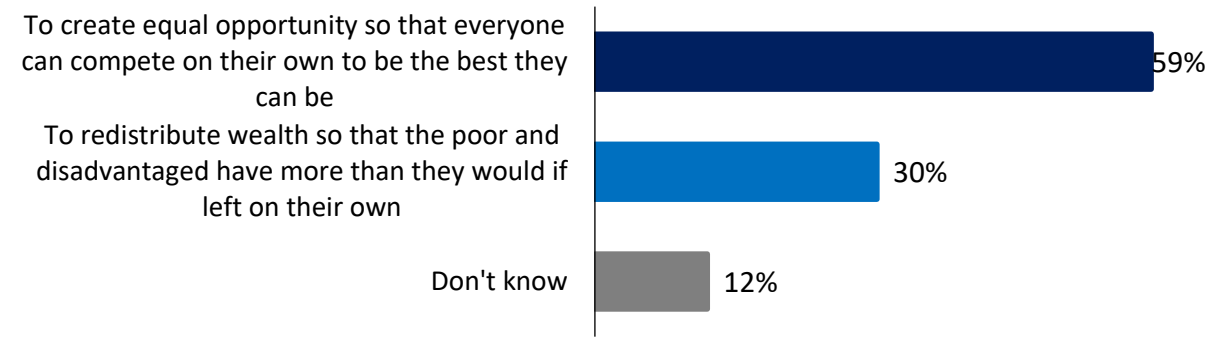
Segmentations

Core Political Values: 3-in-5 think the main role of govt is creating equal opportunity, half (53%) think govt listens to experts too often
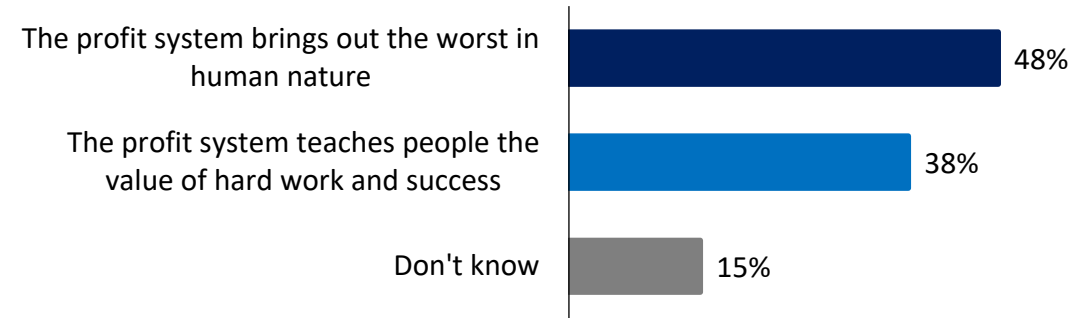
Q When governments make major decisions concerning spending on programs and services, do you think they should be basing their decisions mainly on…?
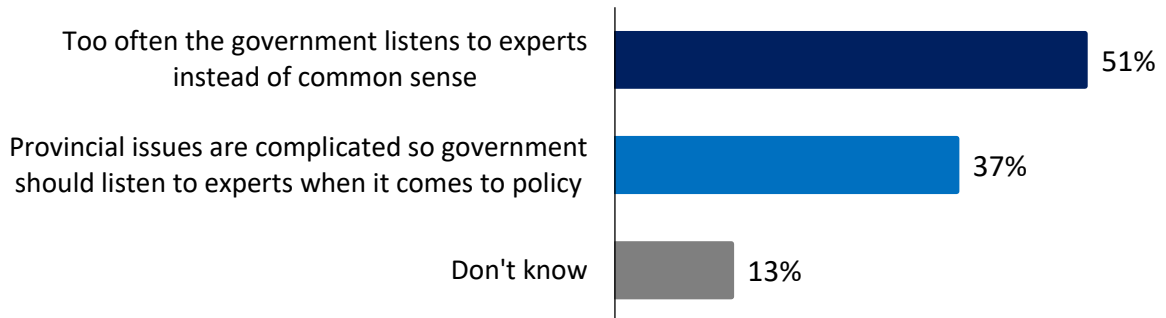[asked of all respondents; n=800]

Their ability to afford the programs and services	36%
The public's need for the programs and services	54%
Don't know	10%

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

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	12%

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

The profit system brings out the worst in human nature	48%
The profit system teaches people the value of hard work and success	38%
Don't know	15%

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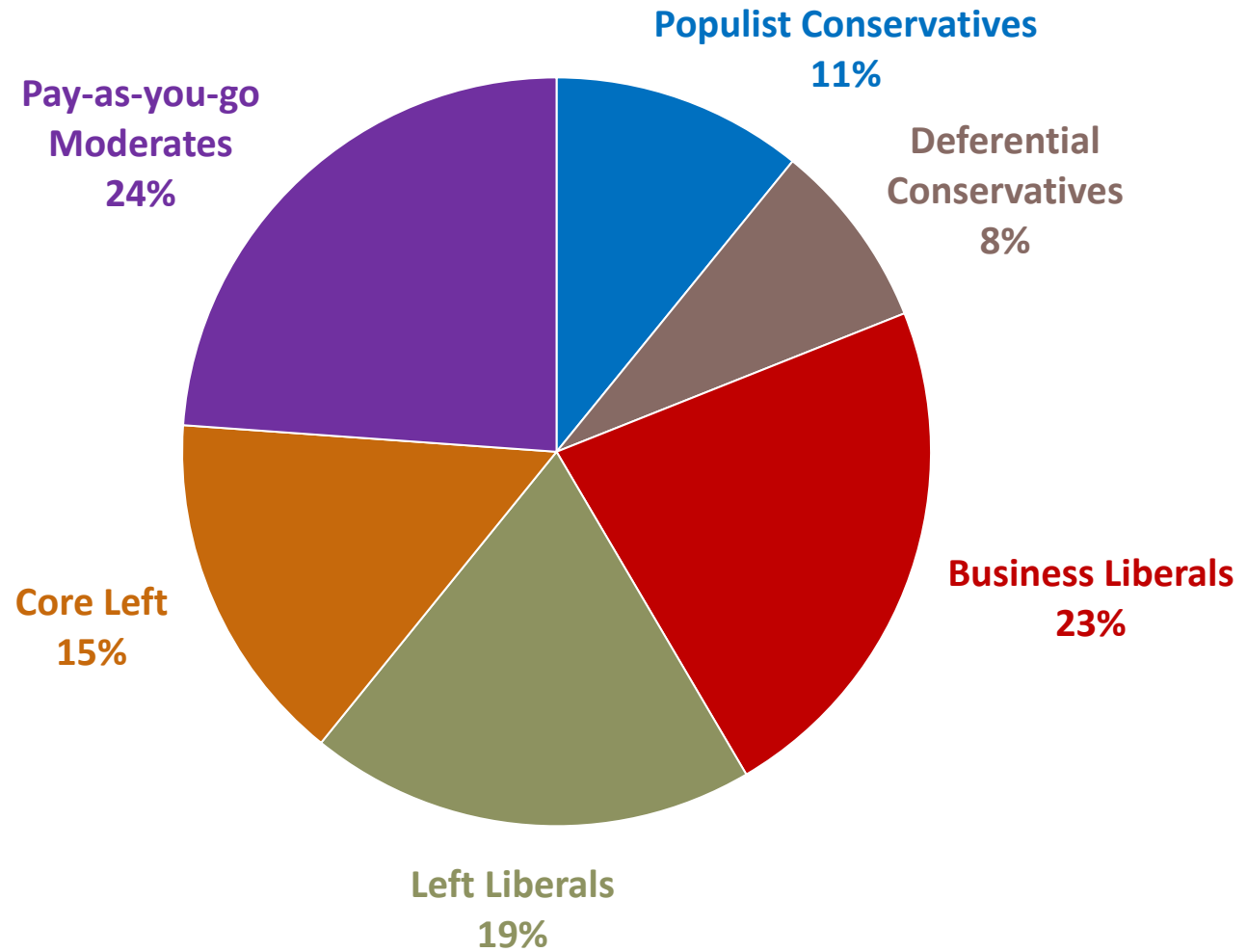[asked of all respondents; n=800]

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	37%
Don't know	13%

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Value Clusters: 23% of Ontarians are Business Liberals and 24% are Pay-as-you-go Moderates

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]

Pie chart:
- Populist Conservatives 11%
- Deferential Conservatives 8%
- Business Liberals 23%
- Left Liberals 19%
- Core Left 15%
- Pay-as-you-go Moderates 24%

Current data: February 2025

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Defining Value Clusters: Business Liberals think govt decisions should be needs-based, while Pay-as-you-go Moderates prioritize affordability

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	86%	90%	0%	0%	0%	79%
	Public Need	0%	0%	96%	94%	96%	0%
Is the main role of government to…?	Create equal opportunity	98%	75%	64%	94%	0%	38%
	Redistribute wealth	0%	18%	24%	0%	94%	35%
When it comes to government decision making…	Rely on common sense	100%	0%	37%	62%	42%	55%
	Listen to experts	0%	87%	53%	32%	47%	18%
The profit system…	Brings out the worst in human nature	0%	0%	0%	90%	90%	69%
	Teaches value of hard work and success	84%	88%	86%	0%	0%	9%

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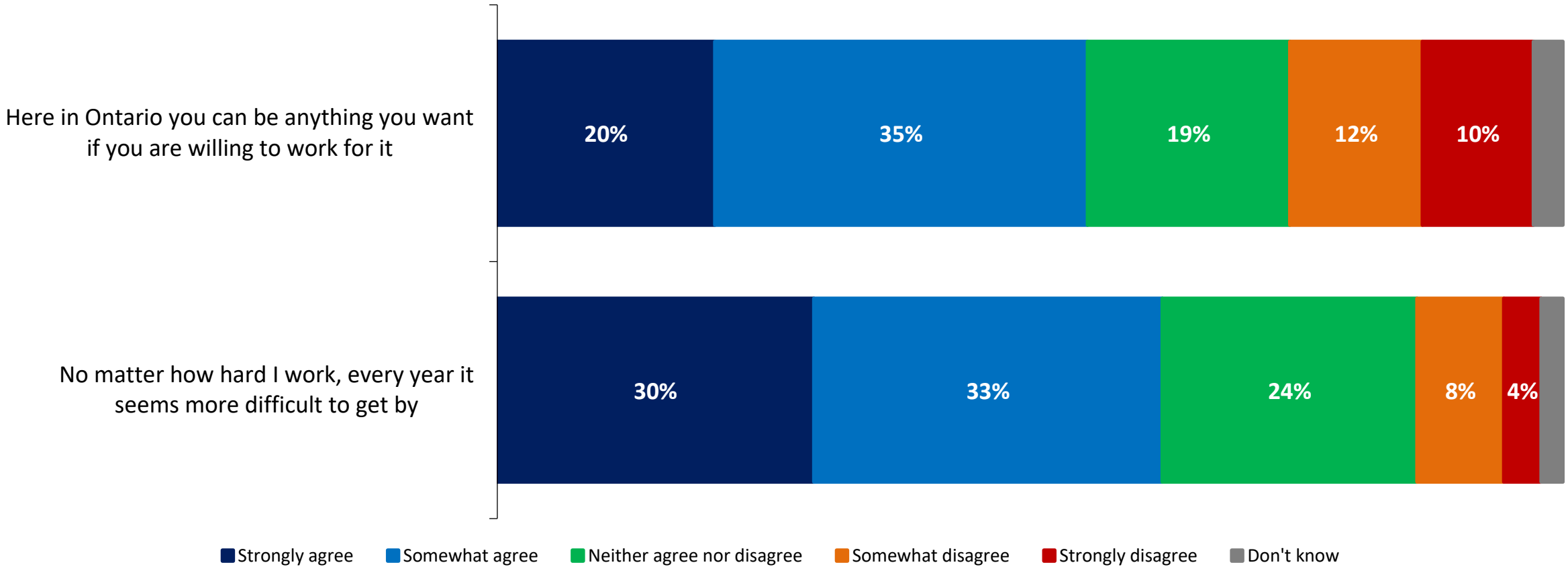RESEARCH GROUP

Economic Gap Segmentation: 63% agree that getting by seems more difficult every year, while 55% agree that you can anything with work

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

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

Strongly agree	Somewhat agree	Neither agree nor disagree	Somewhat disagree	Strongly disagree
20%	35%	19%	12%	10%

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

Strongly agree	Somewhat agree	Neither agree nor disagree	Somewhat disagree	Strongly disagree
30%	33%	24%	8%	4%

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

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Current data: February 2025

Economic Gap Segmentation: About 1-in-3 (32%) Ontarians are Strugglers; Achievers (23%) and Alienated (23%) are nearly equal

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'.
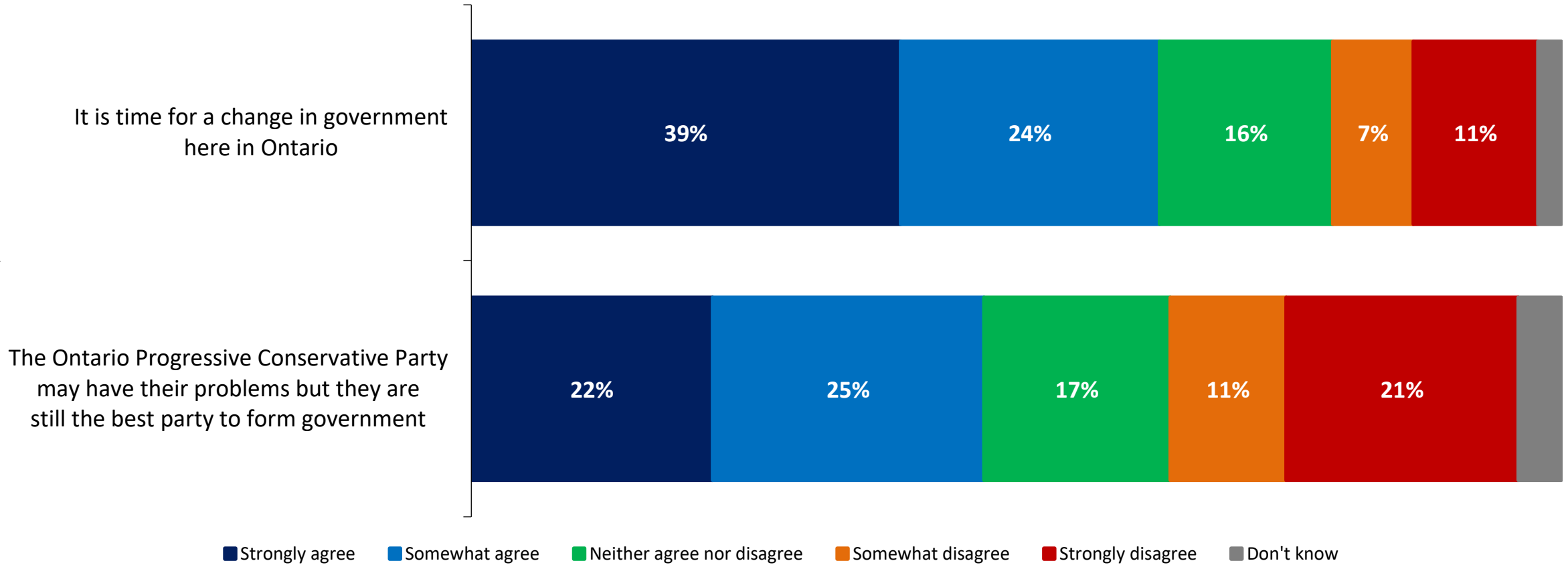[asked of all respondents; n=800]

Alienated
23%

Achievers
23%

Ambivalent
22%

Strugglers
32%

Current data: February 2025

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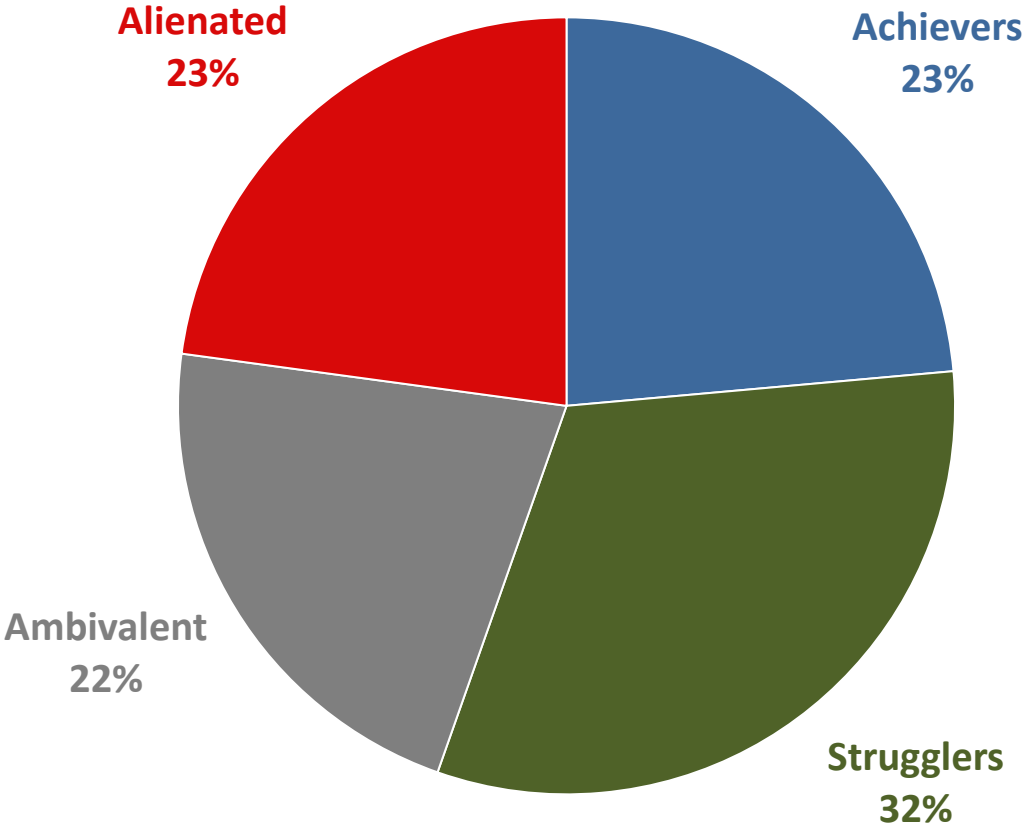
Time for Change Attitudes: 3-in-5 (63%) think it is time for a change in govt, while 47% think the PCs are still the best party to form govt

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

Statement	Strongly agree	Somewhat agree	Neither agree nor disagree	Somewhat disagree	Strongly disagree
It is time for a change in government here in Ontario	39%	24%	16%	7%	11%
The Ontario Progressive Conservative Party may have their problems but they are still the best party to form government	22%	25%	17%	11%	21%

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

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Current data: February 2025

Time for Change Segmentation: The share of those who are Core Government (19%) and Hostile (18%) are nearly equal

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'.
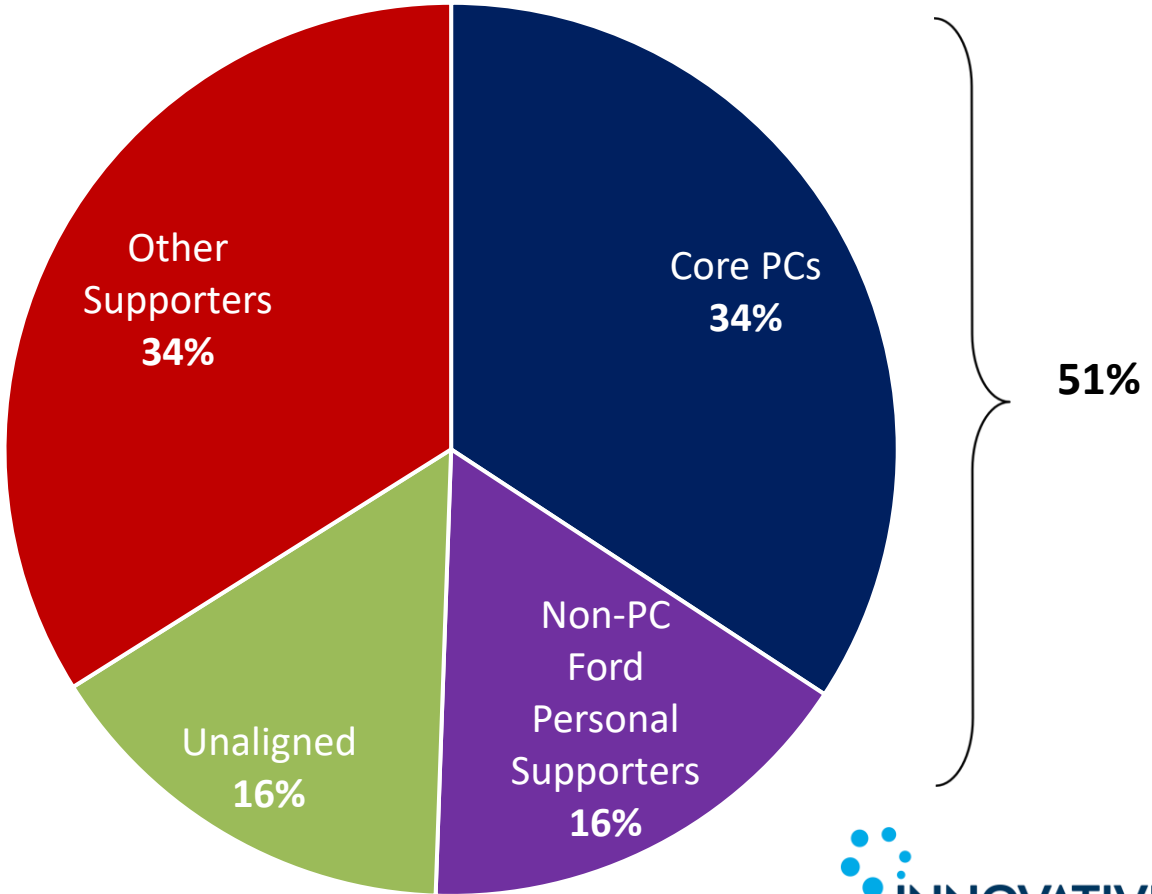[asked of all respondents; n=800]

Current data: February 2025
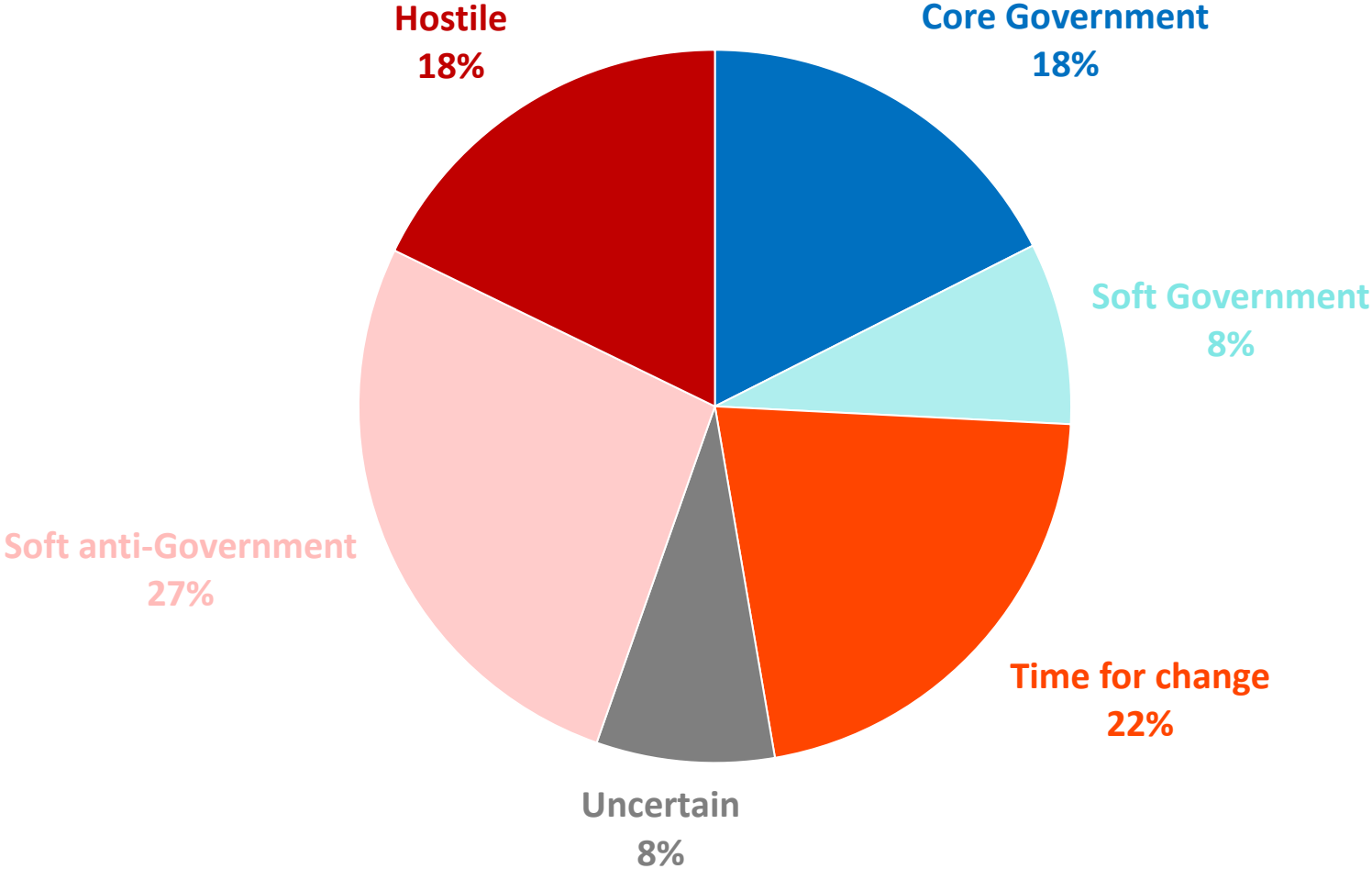
Ford Personal Vote: More than half are Ford supporters, including 16% who have a positive impression of Ford, but are not PC identifiers

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 Personal 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

Pie chart:
- Core PCs 34%
- Non-PC Ford Personal Supporters 16%
- Unaligned 16%
- Other Supporters 34%

51%

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Current data: February 2025

Methodology

Ontario Weights: Age, gender, and region

Results for Ontario are weighted by age, gender, region, education, and self-reported federal past vote 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 sample. Weighted and unweighted frequencies are reported below.

	Unweighted (n)	Unweighted (%)	Weighted (n)	Weighted (%)
M 18-34	82	9.8%	110	13.9%
M 35-54	122	14.6%	122	15.3%
M 55+	190	22.8%	152	19.1%
W 18-34	100	12.0%	107	13.4%
W 35-54	141	16.9%	131	16.4%
W 55+	200	24.0%	175	21.9%
Toronto	177	21.1%	162	20.3%
Rest of GTA	214	25.5%	205	25.7%
South/West	227	27.1%	214	26.7%
North/East	220	26.3%	219	27.4%

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