

2025 Ontario Election Insights

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 JS INSIGHTS

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The Story

With less than one week to go until Ontarians elect their next provincial government, these survey results from Probe Research and JS Insights suggest that even in a difficult environment with a strong desire for change, Doug Ford and the Progressive Conservatives (PCs) appear set to cruise to re-election. None of the arrows slung by opposition leaders appear to be having any impact on Ford's formidable lead – and on most issues, voters consider Ford and the PCs the best choice to address the challenges facing the province.

Normally, the overall mood of the province and appetite for change would sink an incumbent government. More than one-half of Ontarians state they believe things in Ontario are going in the wrong direction and nearly one-half of Ontarians believe their own personal situation is worse than it was three years ago. Nearly one-half believe it is time for a change in government in Ontario, and majorities of Ontarians agree with some of the main criticisms of Ford and the PCs – namely, that they are focused on electoral gimmicks and prioritize their friends over the concerns of ordinary Ontarians.

One key reason Ford's political obituary is not being prepared is that despite these “bad actor” characterizations, the PCs maintain a healthy lead over their rivals when it comes to addressing important policy issues like making day-to-day-life more affordable and creating jobs and economic development. Ford is also Ontario's undisputed champ when it comes to dealing with proposed U.S. tariffs and standing up to Donald Trump. Ford's dominance on these high-priority election issues seems to be keeping the PC boat afloat.

For the second election in a row, Ontario's anticipated “progressive primary” does not seem to have materialized – and there is likely little time for non-PC voters to coalesce around a clear alternative. While the Liberals are perceived by a majority of non-PC voters as the most viable option to defeat the incumbent – and a higher share of voters are open to voting Liberal – significant numbers of NDP voters will not vote Liberal, and vice-versa. Interestingly – and perhaps because of the long stretch of co-operation in Ottawa between the federal Liberal government and the NDP – there is a strong appetite among non-PC voters for the Ontario Liberals, NDP and even the Greens to express a promise to govern together if they can manage to win more seats than Doug Ford and the PCs.

Key Findings

Ontarians do not feel things are going well for them, or for their province. More than one-half indicate Ontario is heading in the wrong direction, compared to one-quarter who think things are on the right track. Nearly one-half think their own personal circumstances are worse today than they were three years ago, compared to just 15 per cent who think things are better for them personally, and one-third who believe their personal circumstances have not changed.

Nearly one-half believe Ontario needs a new government, but a significant proportion hope the election ends with a PC victory. Fewer than four in 10 believe Doug Ford and the PCs should be re-elected, compared to 48 per cent who believe it is time for a change. However, one-third of Ontarians want the PCs to win a similar-sized or larger majority government than what they have now, with another one in five wanting a smaller PC majority or a PC minority government. One-third want one of the opposition parties to win, while nearly one in five have no preference on who forms the next provincial government.

A majority of Liberal, NDP and Green Party supporters want these parties to form a coalition government. A majority of those who plan to vote for the current opposition parties want these leaders and candidates to campaign on a promise to govern together if they manage to win more seats than the PCs. Non-PC voters are also most likely to believe Bonnie Crombie and the Ontario Liberals are best positioned to defeat the PCs. They are also somewhat more enthusiastic about voting Liberal to defeat a PC candidate.

Public impressions of Doug Ford and his government are not positive, but they see him as someone who will stand up for Ontario. Nearly four in 10 Ontarians have a worse impression of Doug Ford today compared to when he was first elected premier in 2018, versus one in five who say their view of him has improved. More than six in 10 agree the Ford government is more focused on gimmicks than important issues, with more than one-half agreeing the PCs are more concerned about helping their friends than regular Ontarians. However, nearly one-half agree Ford is best suited to standing up to both U.S. President Donald Trump and the federal government.

Key Findings (cont'd)

The cost of living is by far the top issue driving voter sentiment – and Ford and the PCs are seen as best suited to address voters' top priorities. Nearly four in 10 point to the cost of living as their primary concern in this election, with fewer than one in five making their choice based on the threat of U.S. tariffs and the state of the health care system. Ford and the PCs are seen as best suited to deal with the cost of living and the proposed tariffs, with the PCs tied with the Liberals when it comes to the party seen as being best suited to fix health care.

Doug Ford and the PCs hold a commanding lead, with the party consolidating its potential vote to a greater degree than others. Forty-seven per cent (47%) of decided and leaning voters plan to cast a ballot for the PCs, compared to 27 per cent who prefer Bonnie Crombie and the Liberals, 17 per cent who plan to vote for Marit Stiles and the NDP and eight per cent who will back Mike Schreiner and the Greens. Fifteen per cent of Ontarians are undecided. The PCs hold significant leads in most regions, especially the suburban Greater Toronto Area (GTA) and Central and Eastern Ontario. The Liberals hold a slight lead in the City of Toronto (39% to 35%) and are the second-choice party in every other region except Hamilton-Niagara, where the NDP are a distant second to the PCs (41% PC, 28% NDP, 24% Liberal).

Seven in 10 PC voters are certain of their choice, with nearly two-thirds of Liberal voters planning to cast ballots for this party. NDP and Green voters are less certain. Ontarians also express a higher degree of openness for voting for either the PCs or Liberals compared to the NDP or Greens.

Methodology

The survey was conducted with 1,200 Ontario adults between February 10 and 16, 2025. A random sample of Ontario adults who belong to a large scale national online panel (Dynata) were invited to complete the survey.

Because an online panel is a non-probabilistic sample of convenience, no margin of error can be ascribed. For the purposes of comparison, a probability sample of this size would have a margin of error of ± 2.8 percentage points, 19 times out of 20.

Minor statistical weighting has been applied by age, gender and regional and educational attainment so that the sample properly reflects the province's population, based on Census data.

Totals in this report may not add to exactly 100% due to rounding. Results of 2% or less are not shown in the graphs.

The survey was paid for by Probe Research and JS Insights.

Probe Research is an accredited member of the Canadian Research and Insights Council (CRIC) and follows the CRIC Public Opinion Research Standards and Disclosure Requirements, which can be found here: <https://canadianresearchinsightscouncil.ca/standards/>

PROBE RESEARCH

For more than 30 years, **Probe Research** has been Canada's indispensable public opinion research and insights partner. Based in Winnipeg and working across Canada, Probe Research melds journalistic inquiry with social science rigour to help public, private and not-for-profit sector clients answer critical questions and solve their biggest challenges.



JS Insights is a boutique research and engagement consultancy based in Toronto. JS Insights Principal Jodi Shanoff helps clients make decisions with confidence by leveraging decades of experience generating evidence-fueled insights to communicate, motivate and build consensus.

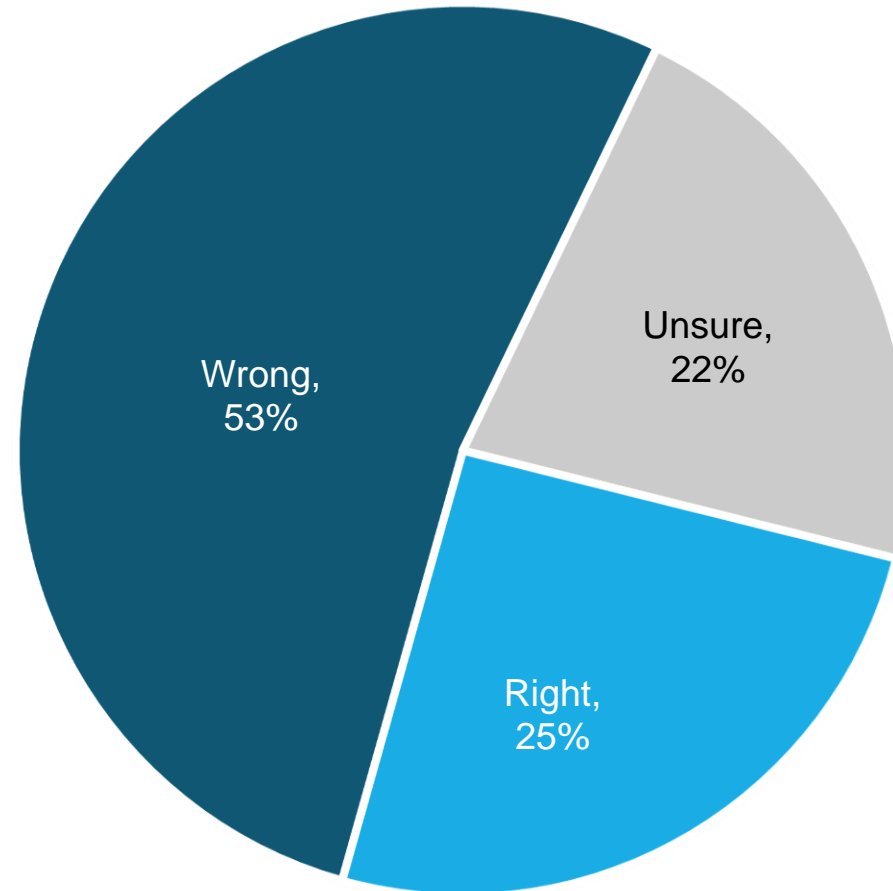


Campaign Impressions and Governing Preferences

Perceived Direction of Ontario

Only one-quarter think the province is on the right track; one-half believe things are not going well

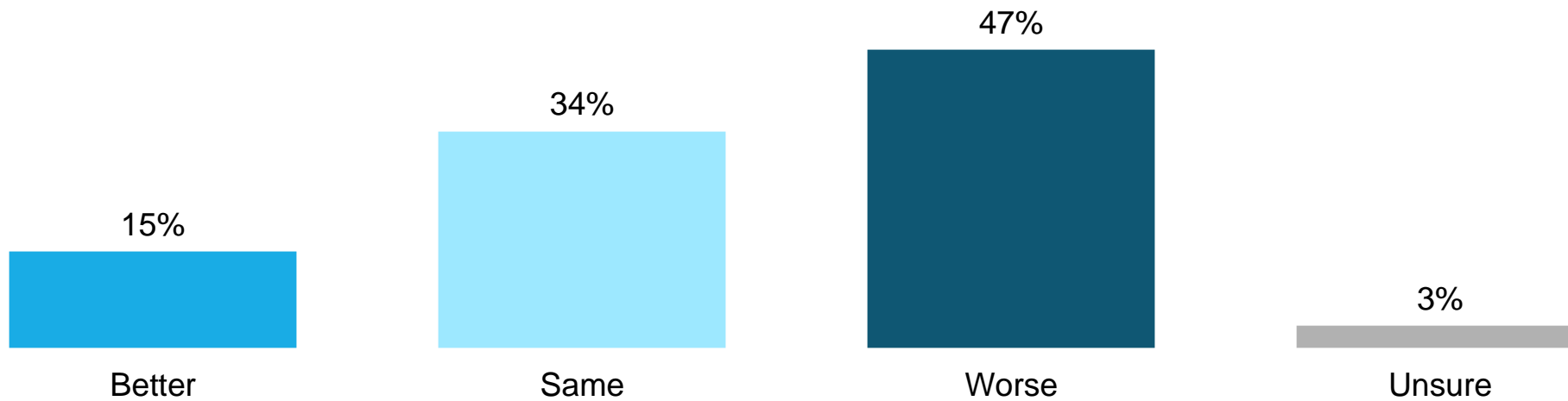
Q1. Overall, do you think things in Ontario are going in the right direction or the wrong direction? (Base: All respondents, N=1,200)



Perceived Personal Situation

Nearly one-half believe they are worse off today compared to three years ago

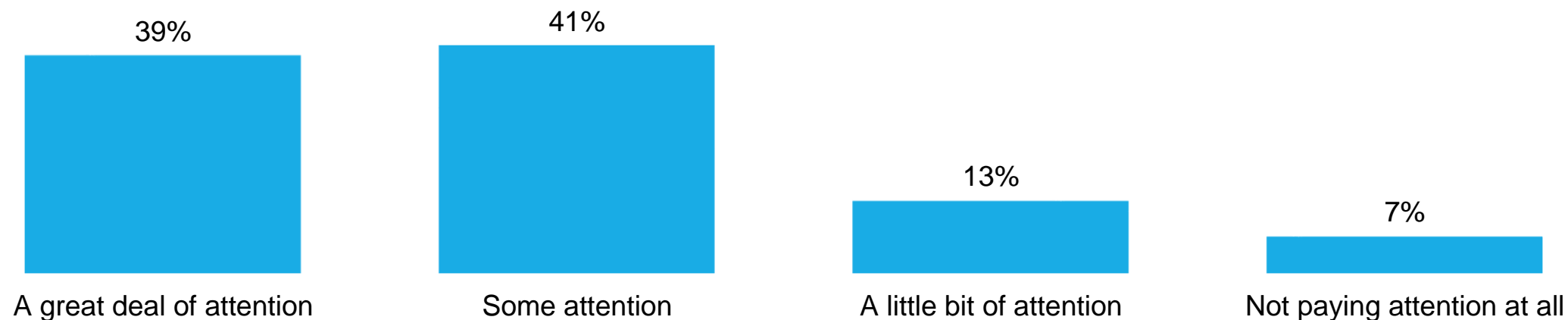
Q2. Do you feel that your overall personal situation is better, worse or the same compared to three years ago? (Base: All respondents, N=1,200)



Attention Being Paid to the Provincial Election Campaign

Four in 10 Ontarians report paying a great deal of attention to the election campaign

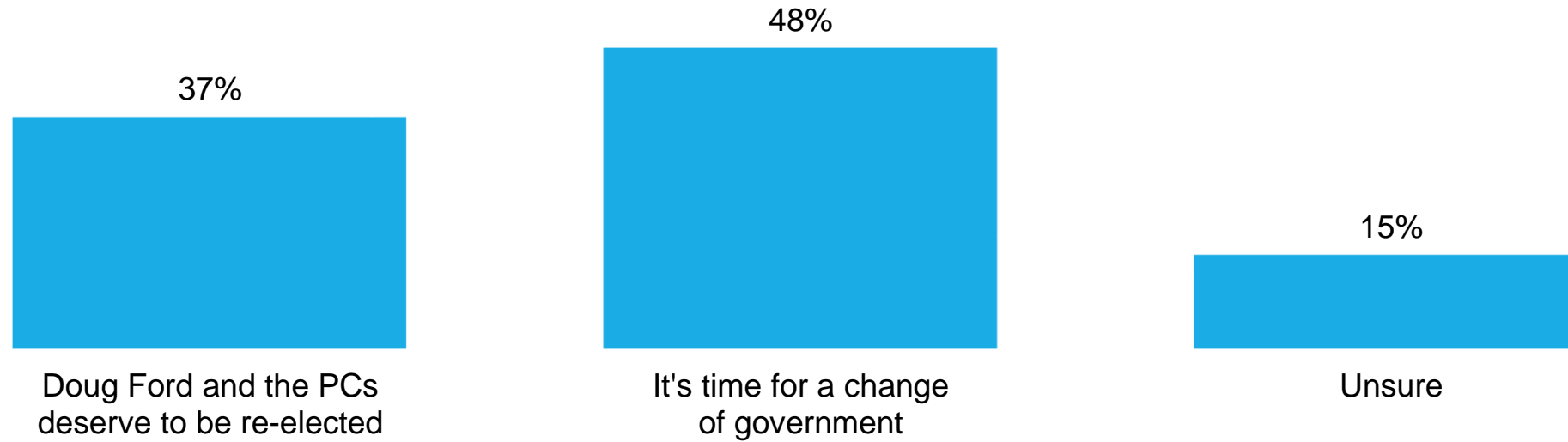
Q3. Ontarians will vote in a provincial election on February 27. How much attention are you paying to the election campaign? (Base: All respondents, N=1,200)



Views on Whether Ontario Needs a New Government

Ontarians are slightly more likely to believe it's time for a new party to take power

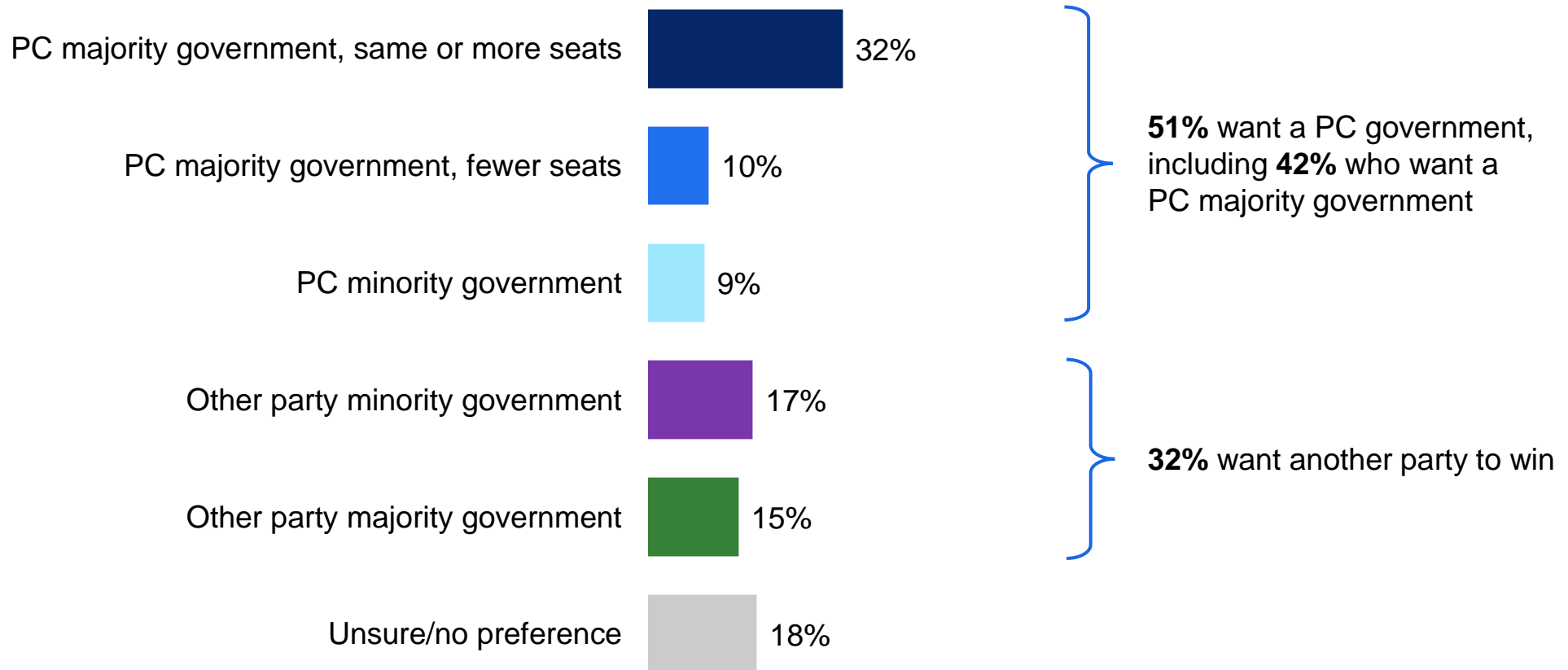
Q10. Do you think Doug Ford and the PCs should be re-elected – or is it time for a change in government in Ontario? (Base: All respondents, N=1,200)



Preferred Election Outcome

One-half of Ontarians want a PC government, with a third who wish to see a strong PC majority

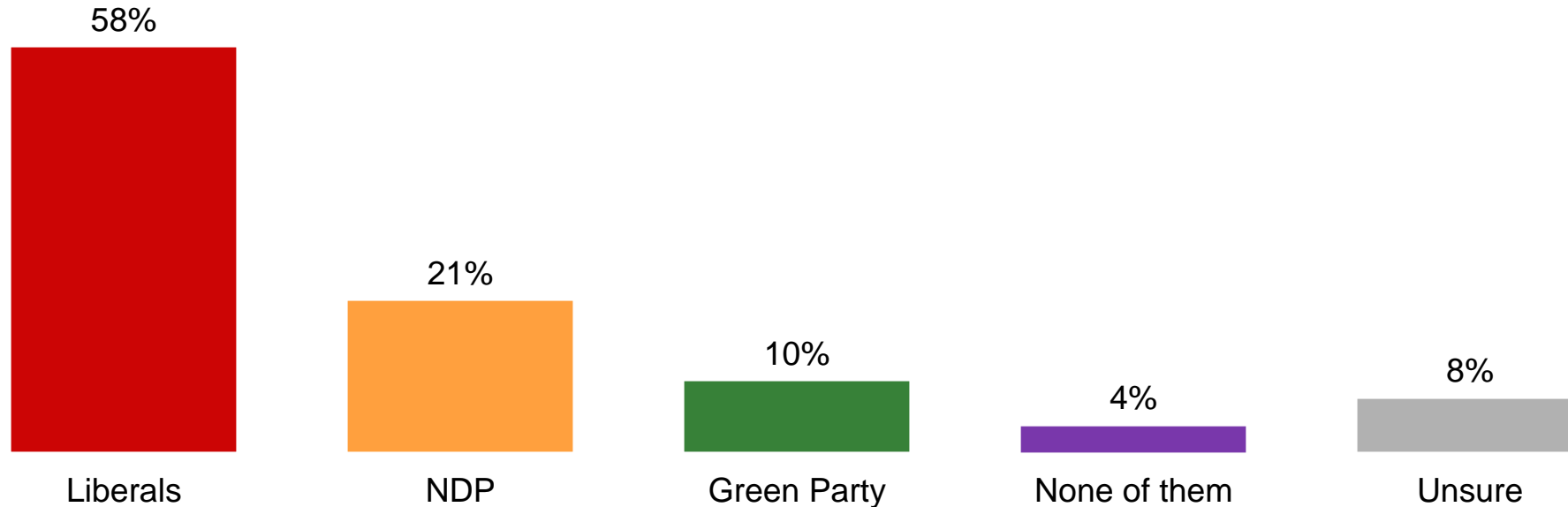
Q11. Doug Ford and the PCs have argued that they need to be re-elected so that they have a mandate to deal with the tariffs proposed by the Trump administration in the U.S. Which of the following would you prefer to happen after the election on February 27? (Base: All respondents, N=1,200)



Party Perceived As Having the Best Chance of Defeating the PCs

Among non-PC voters, the Liberals are seen as best positioned to form government

Q10. Which party do you think has the best chance of winning more seats than Doug Ford and the PCs? (Base: Those decided for/leaning towards the Liberals, NDP or Greens, N=530)

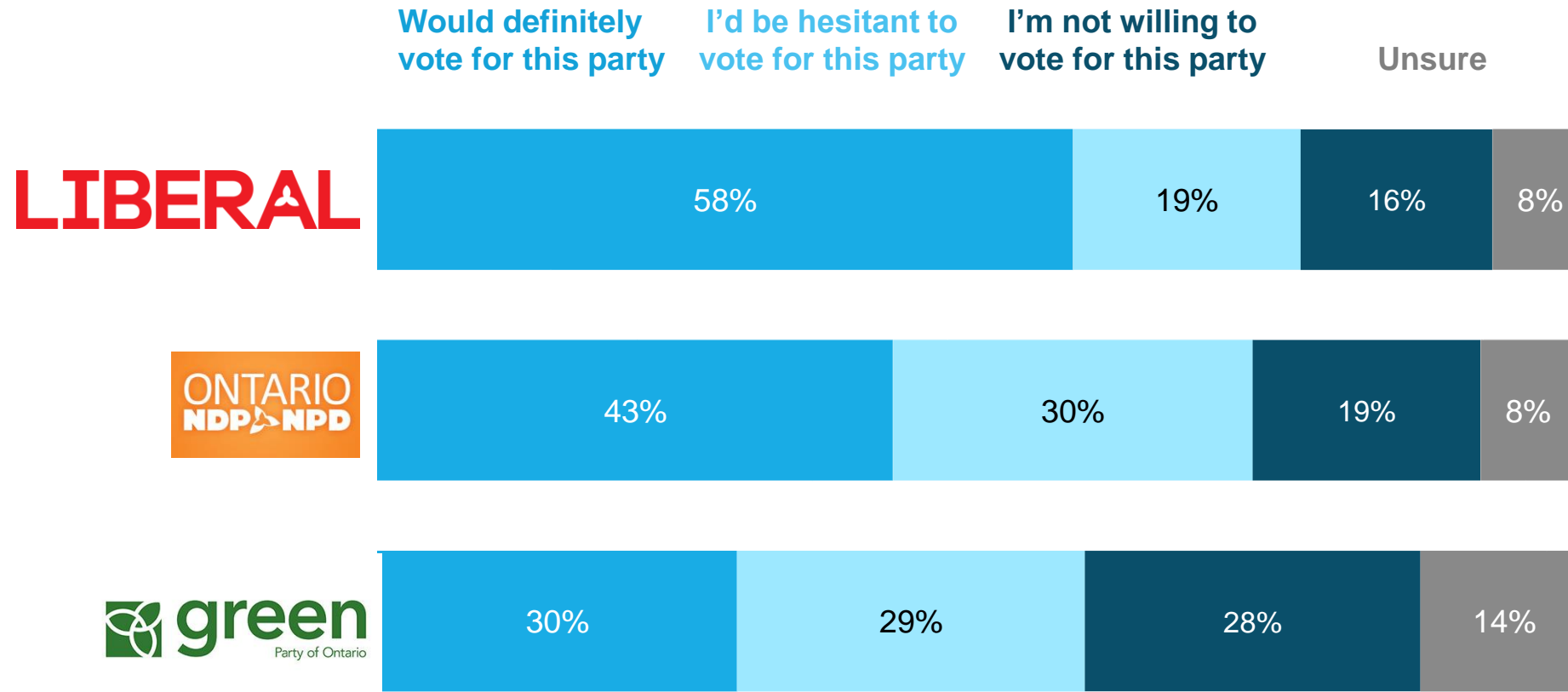


50% of NDP supporters believe their preferred party has the best chance of winning – but 35% indicate the Liberals are best positioned to beat the PCs.

Willingness to Vote Strategically for Specific Parties

A higher proportion of non-PC voters would enthusiastically back the Liberals to defeat the PCs

Q13. How willing would you be to vote for the following parties in your riding if you felt its candidate had a good chance of defeating the PC candidate? (Base: Those decided for/leaning towards the Liberals, NDP or Greens, N=530)

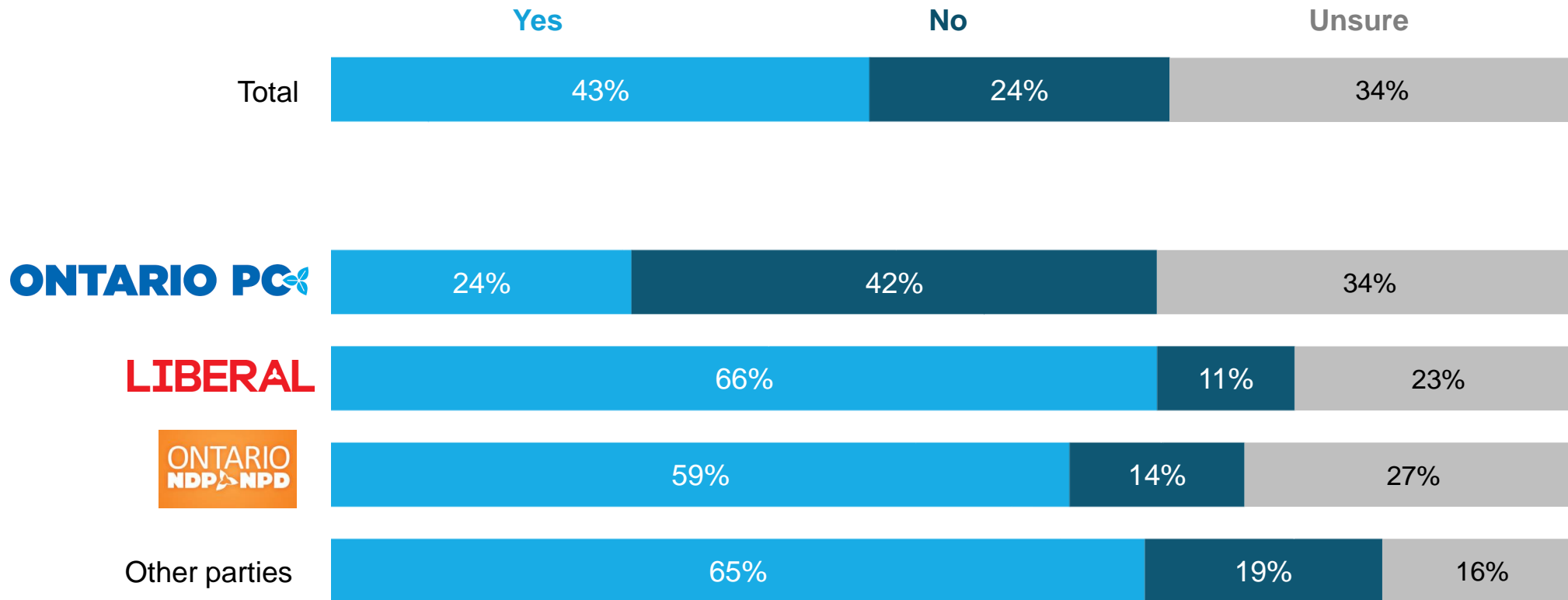


- 27% of Ontario NDP voters are not willing to back an Ontario Liberal candidate (33% would definitely vote Liberal; 31% would do it reluctantly).
- 26% of Ontario Liberal voters are not willing to vote for a NDP candidate (26% would definitely vote NDP; 37% would do so reluctantly).

Support for a Non-PC Coalition Government

Four in 10 Ontarians – including a majority of those backing other parties – want a coalition

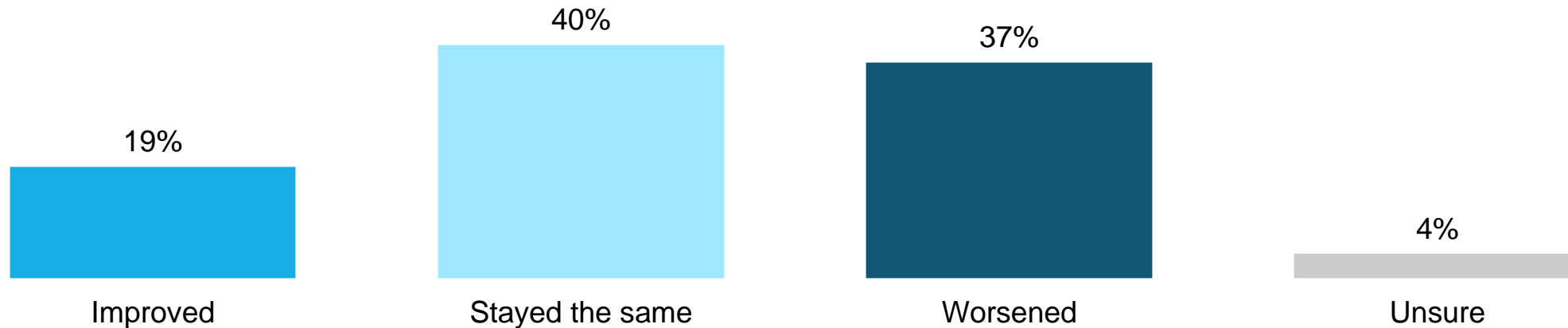
Q14. Should the other parties campaign on a promise to govern together if they can win more seats than Doug Ford and the PCs? (Base: All respondents, N=1,200)



Evolving Impressions of Doug Ford

One-third of Ontarians have soured on the premier versus one in five whose view has improved

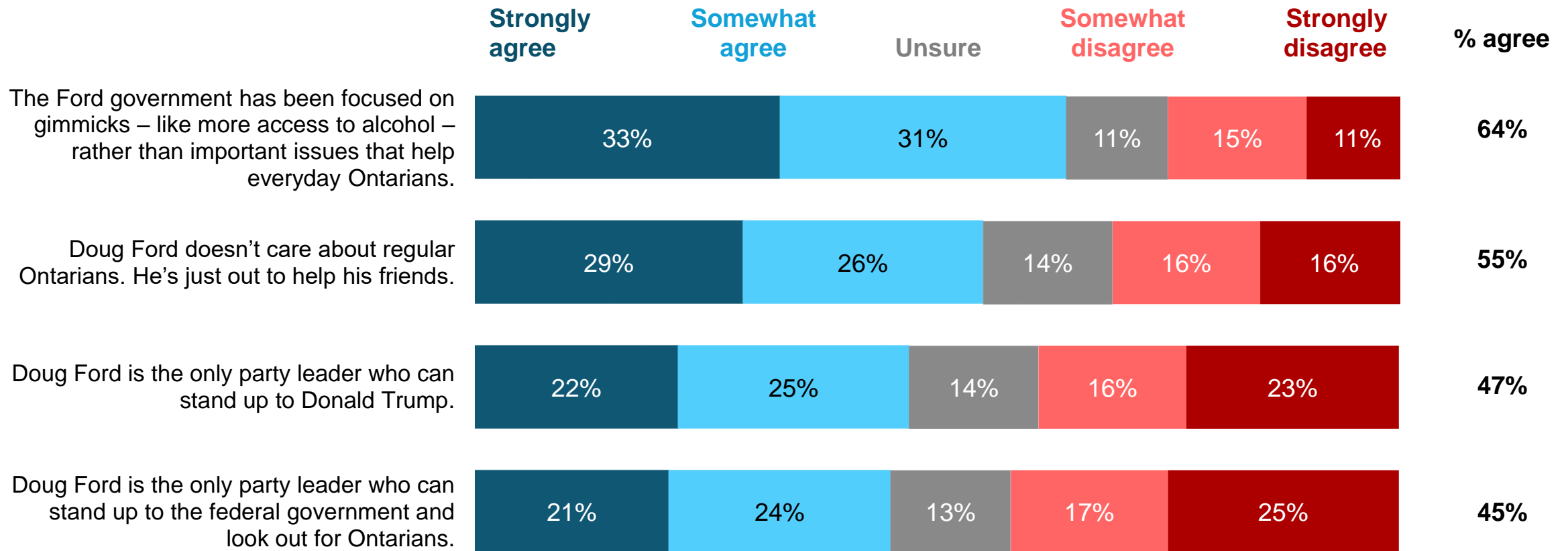
Q9. Doug Ford and the Progressive Conservatives (PCs) have been in power in Ontario since 2018. Has your opinion of Doug Ford improved, worsened or stayed the same over the time that he's been premier? (Base: All respondents, N=1,200)



Attitudes Regarding Doug Ford and the PCs

Majorities agree the Ford government is focused on gimmicks, doesn't care about regular people

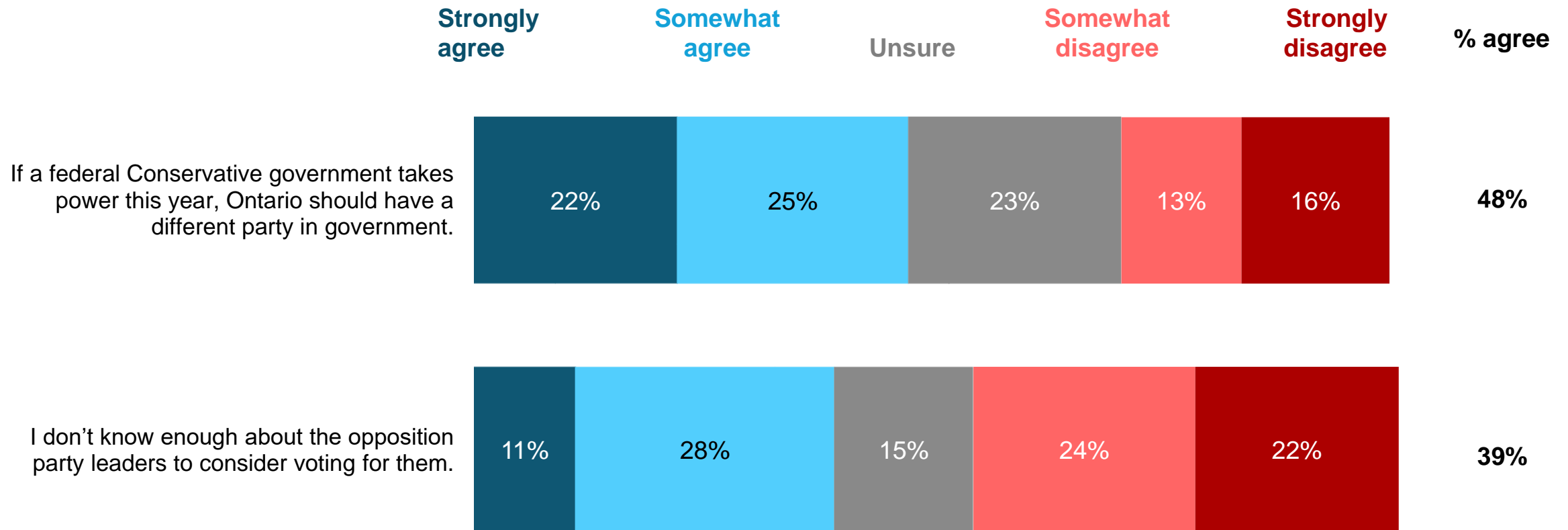
17. Please indicate if you agree or disagree with the following things that have been said about politicians and parties in Ontario. (Base: All respondents, N=1,200)



Attitudes Regarding the Opposition Parties

Nearly one-half agree it's best to have another party in power if the Conservatives win federally

17. Please indicate if you agree or disagree with the following things that have been said about politicians and parties in Ontario. (Base: All respondents, N=1,200)



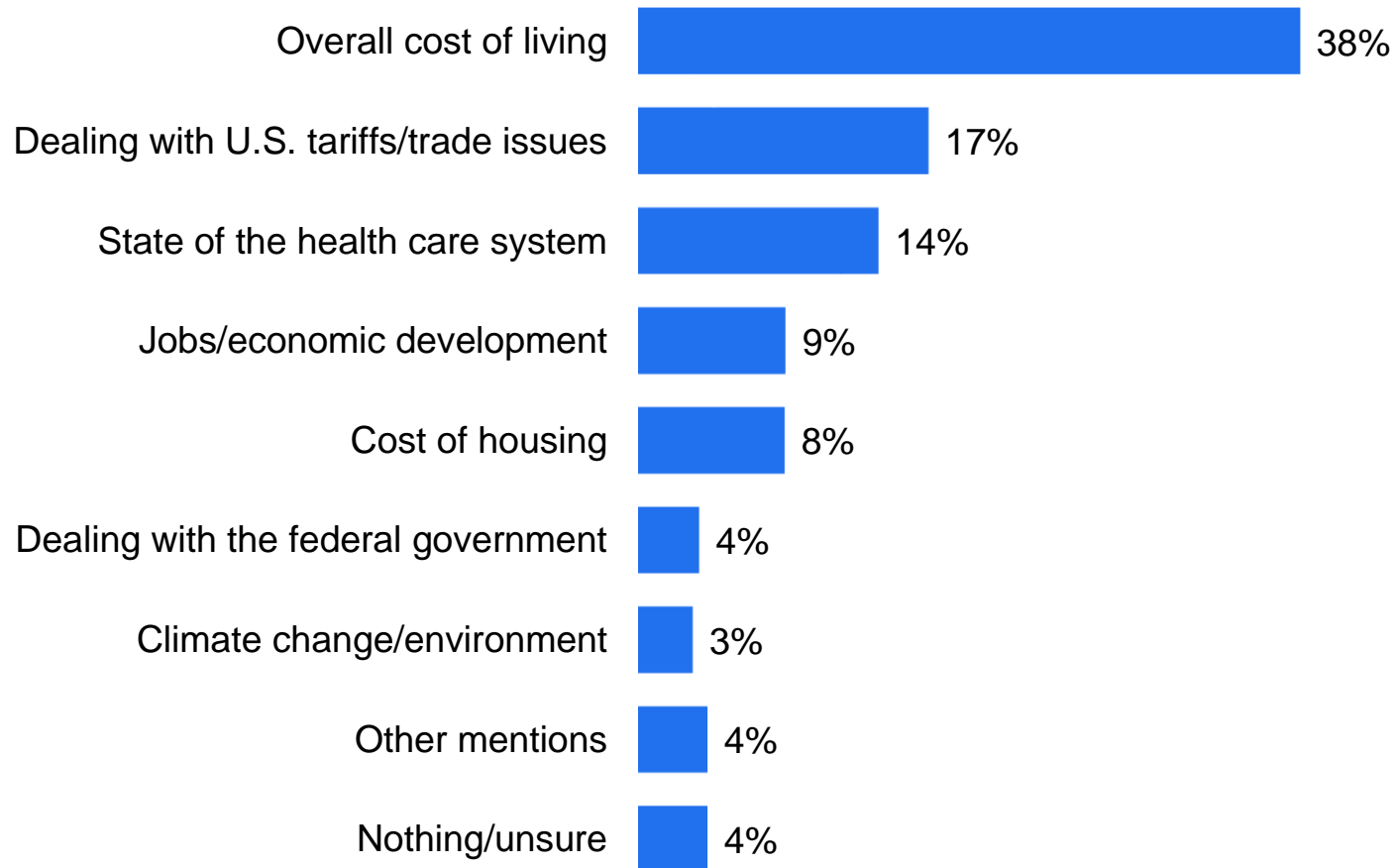
An aerial photograph of a city, likely Toronto, with a strong blue color cast. The CN Tower is the central focus in the lower-left foreground, showing its distinctive rounded observation deck. The rest of the image is filled with a dense grid of skyscrapers and buildings of various heights and architectural styles. The text "Views on Issues" is overlaid in white, bold, sans-serif font on the left side of the image.

Views on Issues

Issues Driving Voting Support

The cost of living is by far the most important issue for Ontario voters

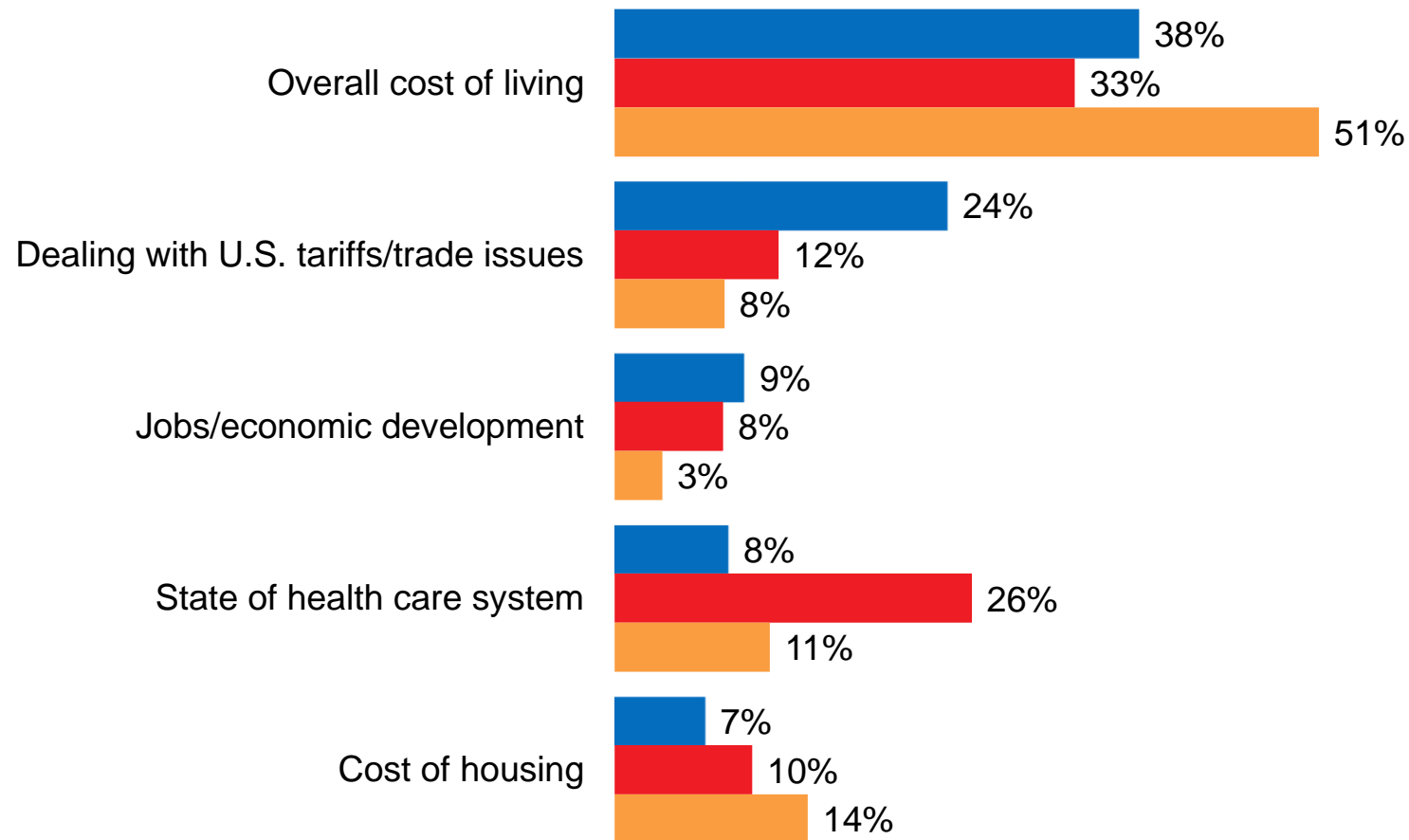
15. What is the top issue that is driving your support for your party of choice in this election? (Please select one response.) (Base: Decided/leaning voters, N=1,006)



Top Issues Driving Voting Support: By Party Support

Health care is more important to Liberal voters, with trade issues motivating PC support

15. What is the top issue that is driving your support for your party of choice in this election? (Please select one response.) (Base: Decided/leaning voters, N=1,006)



ONTARIO PC

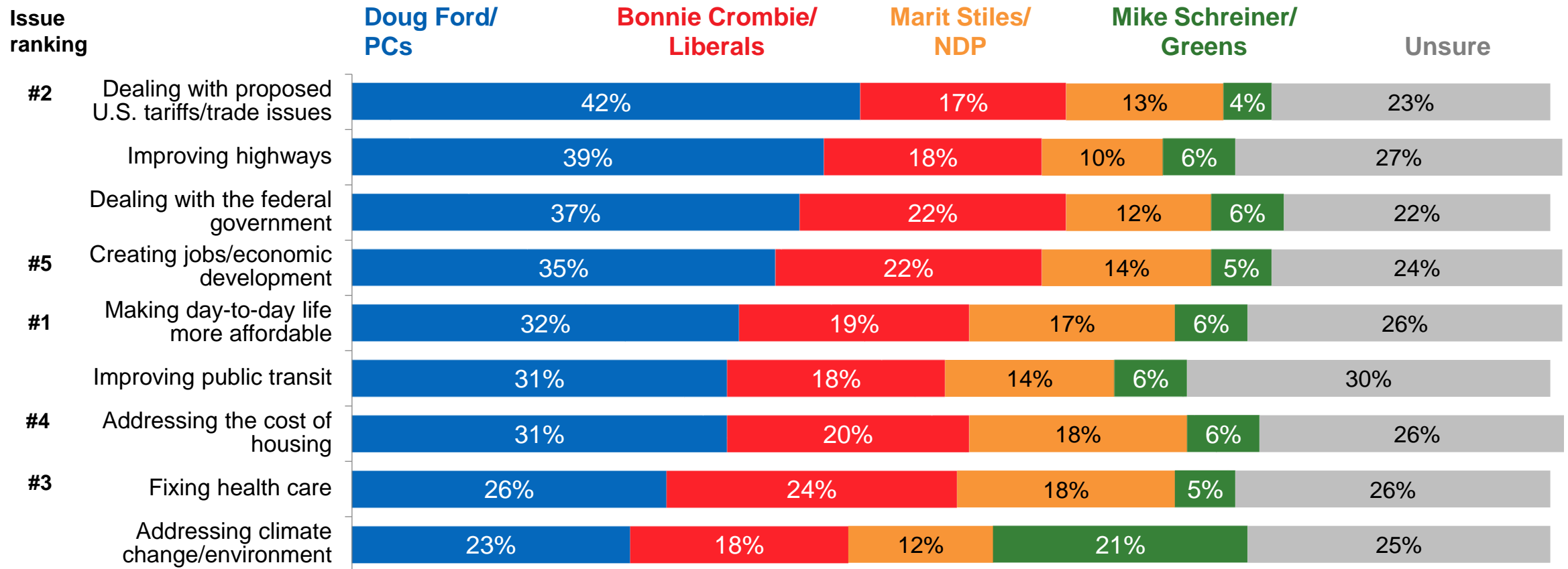
LIBERAL

**ONTARIO
NDP**

Views on Which Party is Best Suited to Address Key Issues

Doug Ford and the PCs hold a clear advantage on most voters' highest-ranked concerns

Q16. And which party and leader do you think will do the best job of managing the following issues? (Base: Decided/leaning voters, N=1,012)



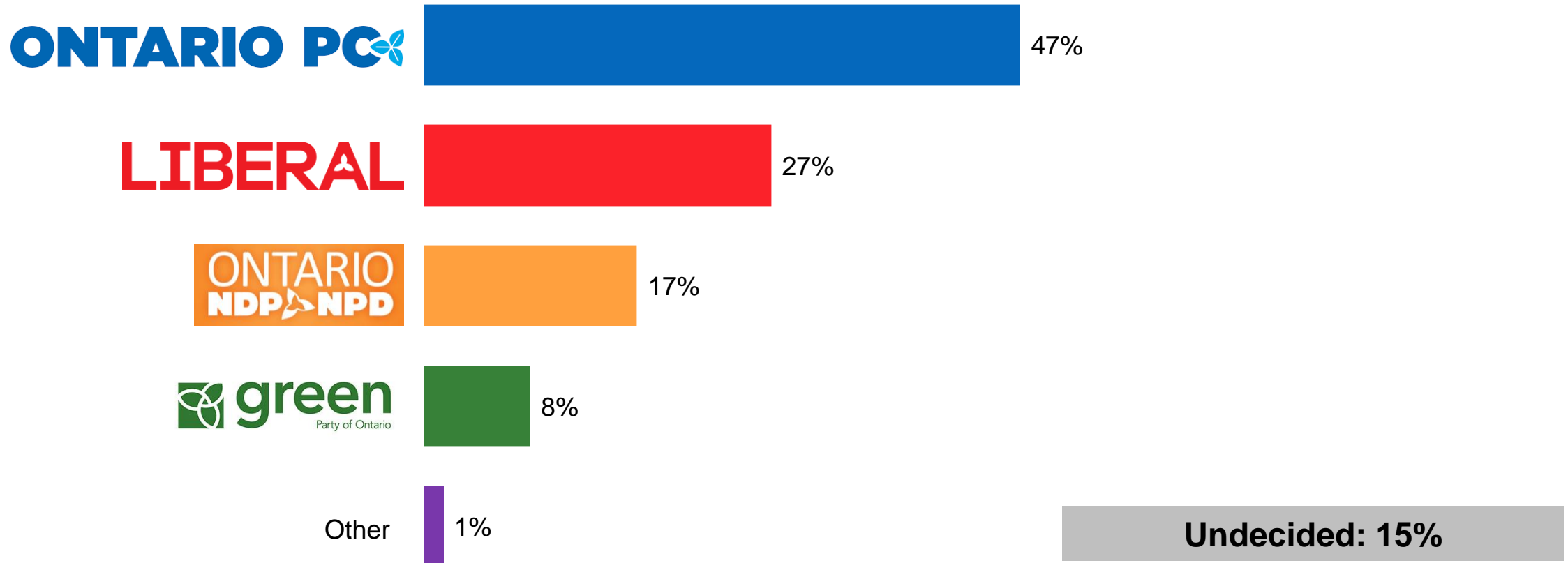
Voting Preferences

Party Support: Decided/Leaning Voters

Doug Ford and the PCs hold a commanding lead, with the Ontario Liberals solidly in second place

Q4. Which party's candidate are you most likely to support in the provincial election on February 27?

Q5. Even though you have not decided whom you would vote for, is there nonetheless a provincial party's candidate you are currently leaning towards? (Base: Decided/leaning voters, N=1,021)

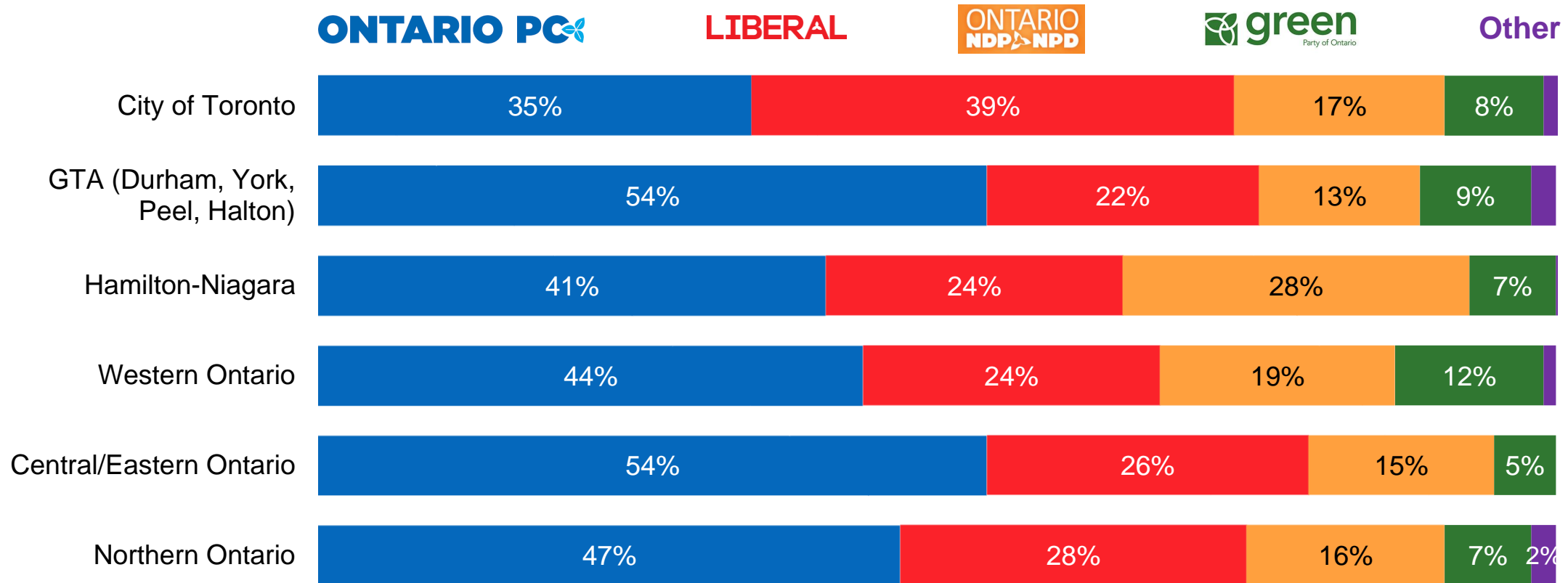


Party Support: Decided/Leaning Vote, by Region

The PCs hold commanding leads province-wide, especially in the suburban GTA, Eastern Ontario

Q4. Which party's candidate are you most likely to support in the provincial election on February 27?

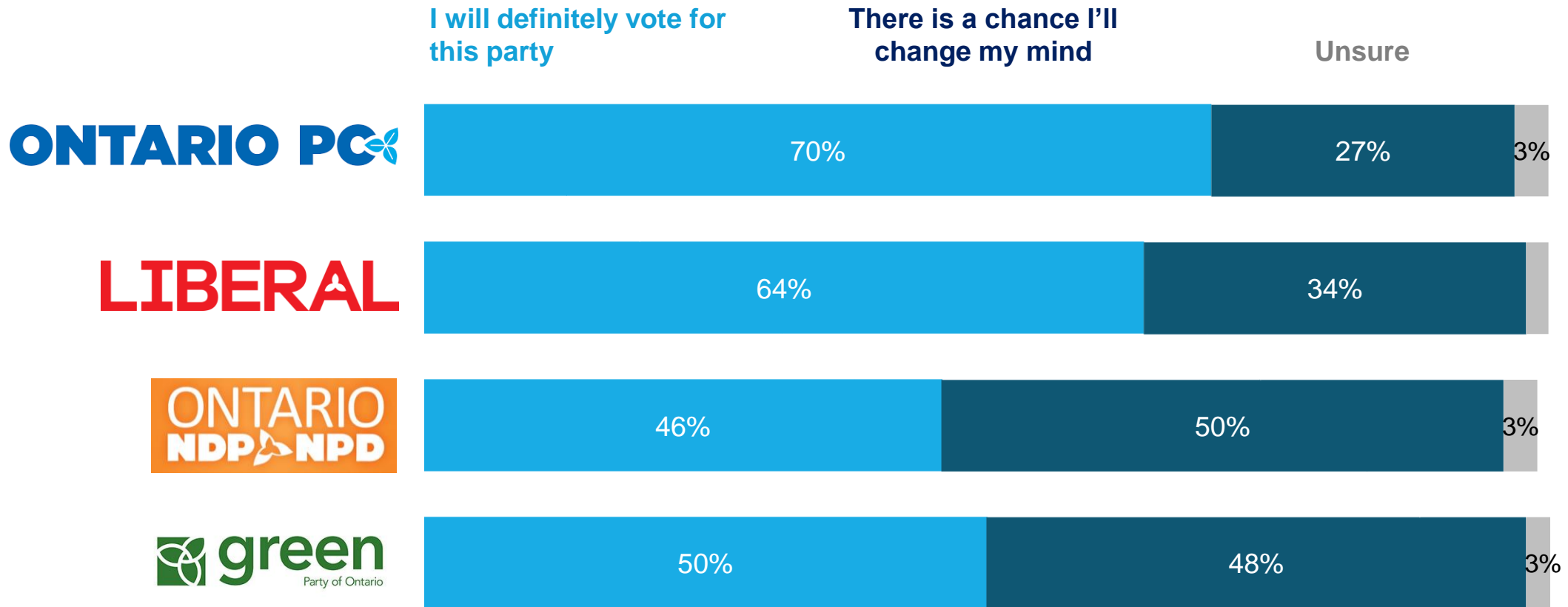
Q5. Even though you have not decided whom you would vote for, is there nonetheless a provincial party's candidate you are currently leaning towards? (Base: Decided/leaning voters, N=1,021)



Certainty of Voting for a Specific Party

PC, Liberal voters are much more certain about their choice compared to those backing the NDP

Q6. How certain are you that you will vote for _____ [INSERT PARTY] in the provincial election? (Base: Decided/leaning voters, N=1,006)



Parties' Accessible Voter Pools

The PCs have captured a much higher proportion of their voter universe

Q7. How open are you to voting for the following parties? (Base: Decided/leaning voters, N=1,006)

