

THE WHY BEHIND THE WHAT: QUALITATIVE POLLING ON FEDERAL VOTING INTENTIONS

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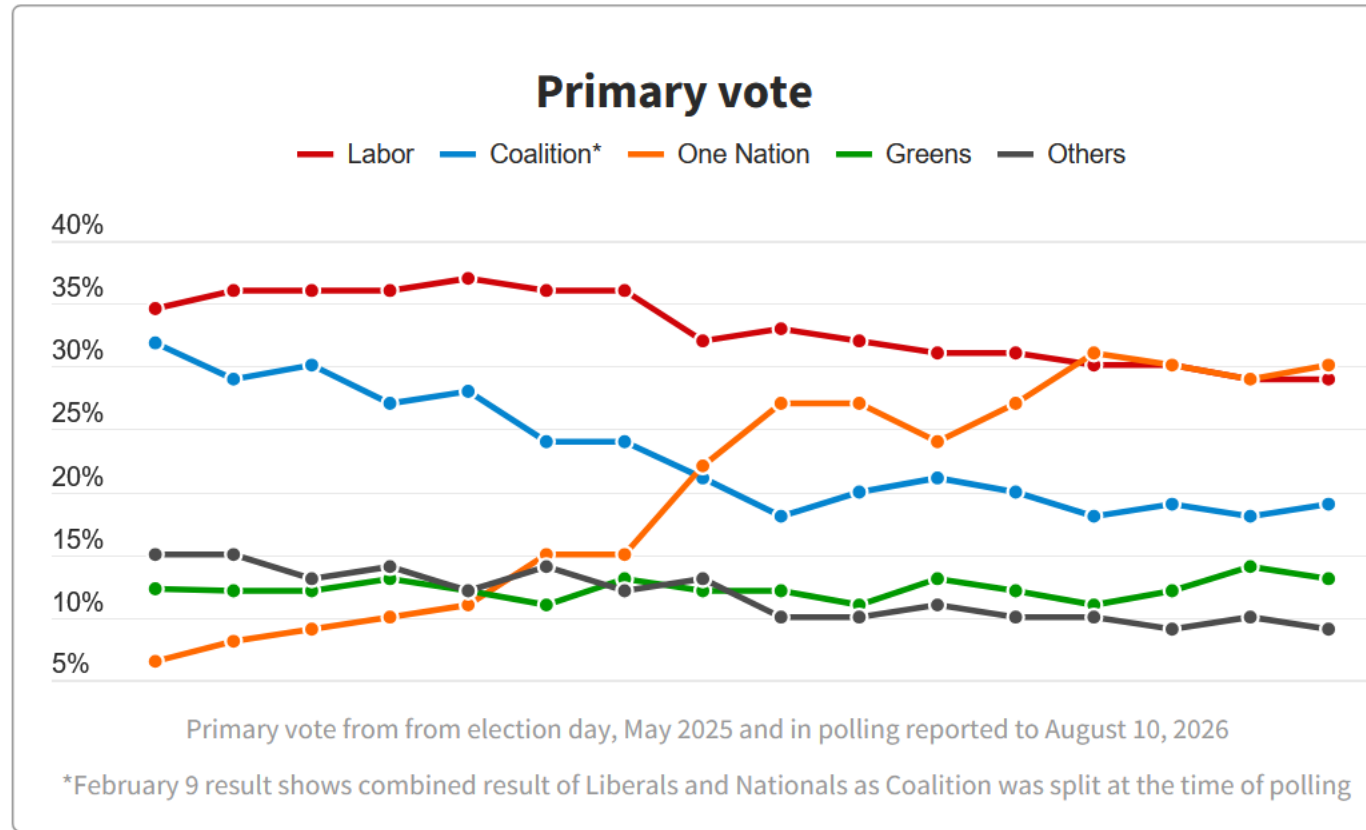
METHODOLOGY

- January 2026 – total 954 responses; virtual focus group 637
- January 2026 resurvey – total 561 responses; virtual focus group 365
- July 2026 - 1053 responses; virtual focus group 828
- 1467 total responses with only 250 completing both
- Around 200,000 words in responses in each major survey

NEWSPOLL

Crunching the numbers

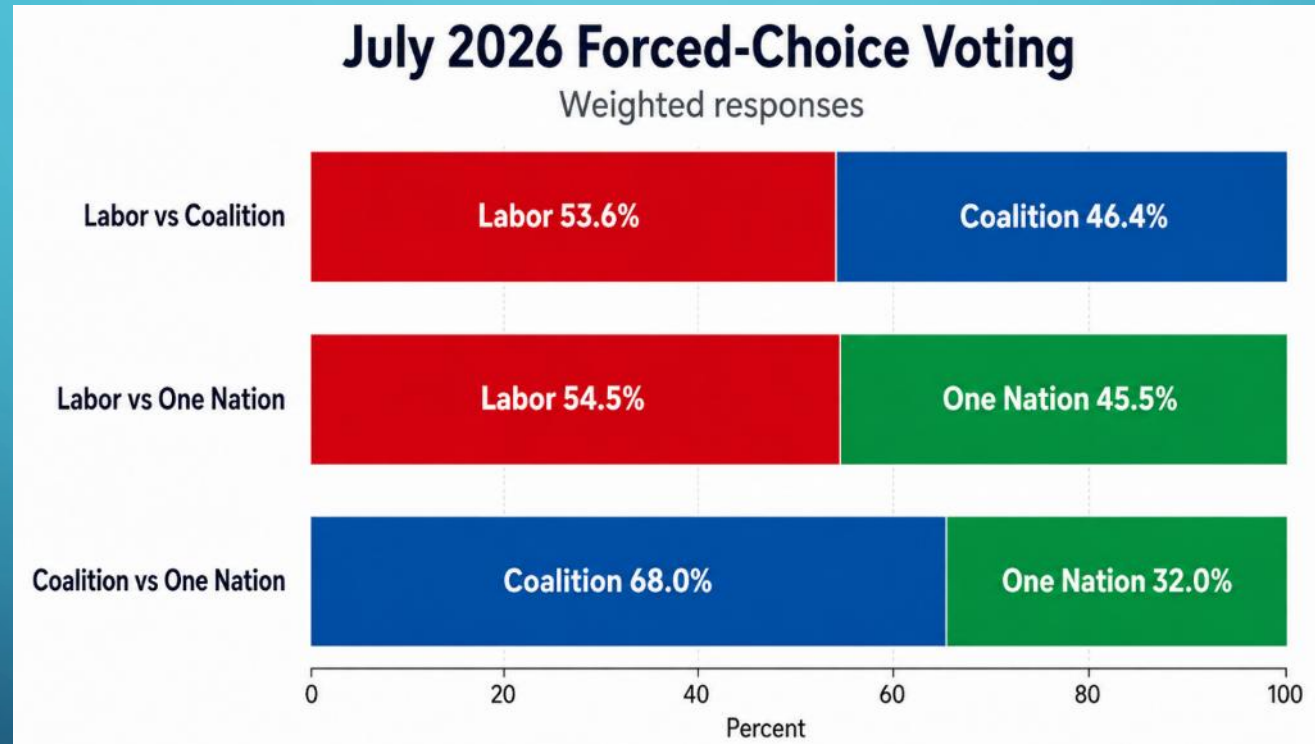
Latest results from Newspoll polling



ANALYSING VOTER SENTIMENT

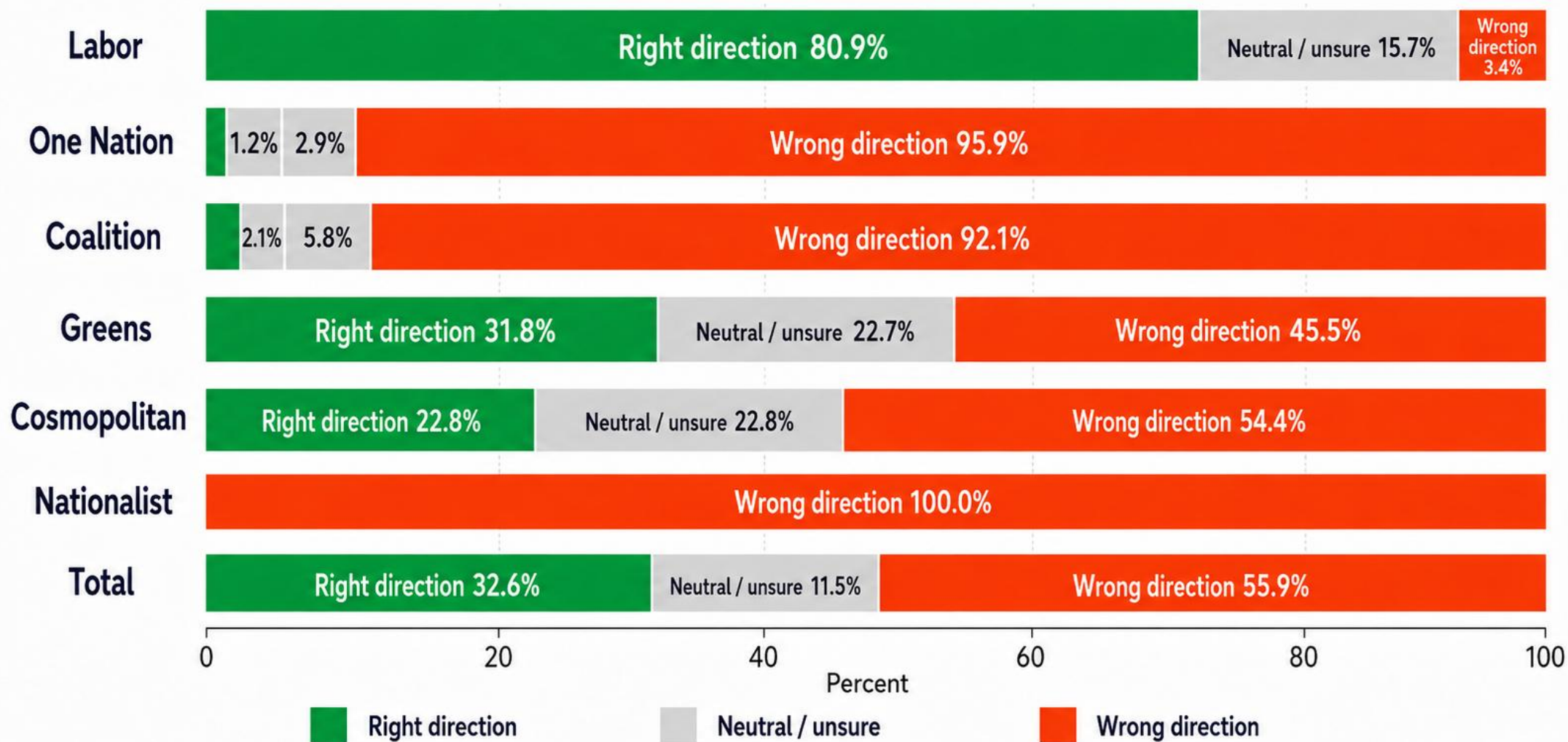
- Qualitative and Quantitative Questionnaire
- Quant – where they're coming from
- Qual – why
- Normalise against voting intention

TWO PARTY PREFERRED VOTE



Heading in the Right Direction

July 2026, by voting tribe



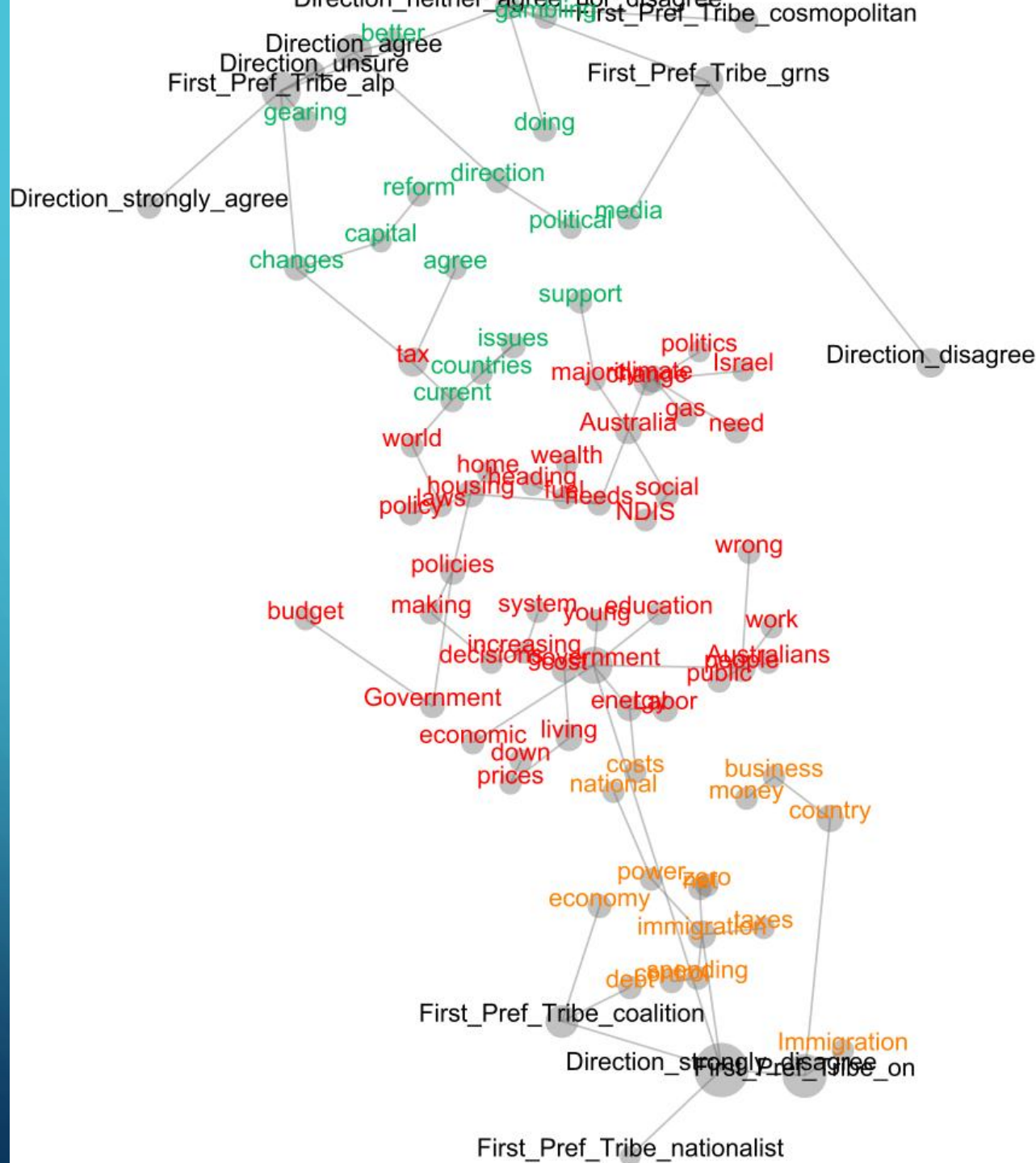


Key point: 'Wrong direction' can mean either *wrong destination* or *not fast enough*.

 Tribe	 Why 'right direction'	 Why 'wrong direction'
 Labor	● Reform; wages and public services ● housing measures; tax changes ● steady government	● Very few negative respondents
 One Nation	● Very few positive respondents	● Immigration; housing pressure; net zero and renewables ● spending and tax; cultural change; loss of control
 Coalition	● Very few positive respondents	● Cost of living; spending and debt; tax; housing ● immigration; energy costs; competence
 Greens	● Broad progressive direction ● some reform	● Not fast enough: climate; fossil fuels; inequality ● housing; AUKUS and Gaza
 Cosmopolitan	● Reformist or progressive direction	● Housing; inequality; immigration ● economic stagnation; only tinkering
 Nationalist	● Essentially none	● Immigration; national sovereignty; cultural cohesion ● energy; government control

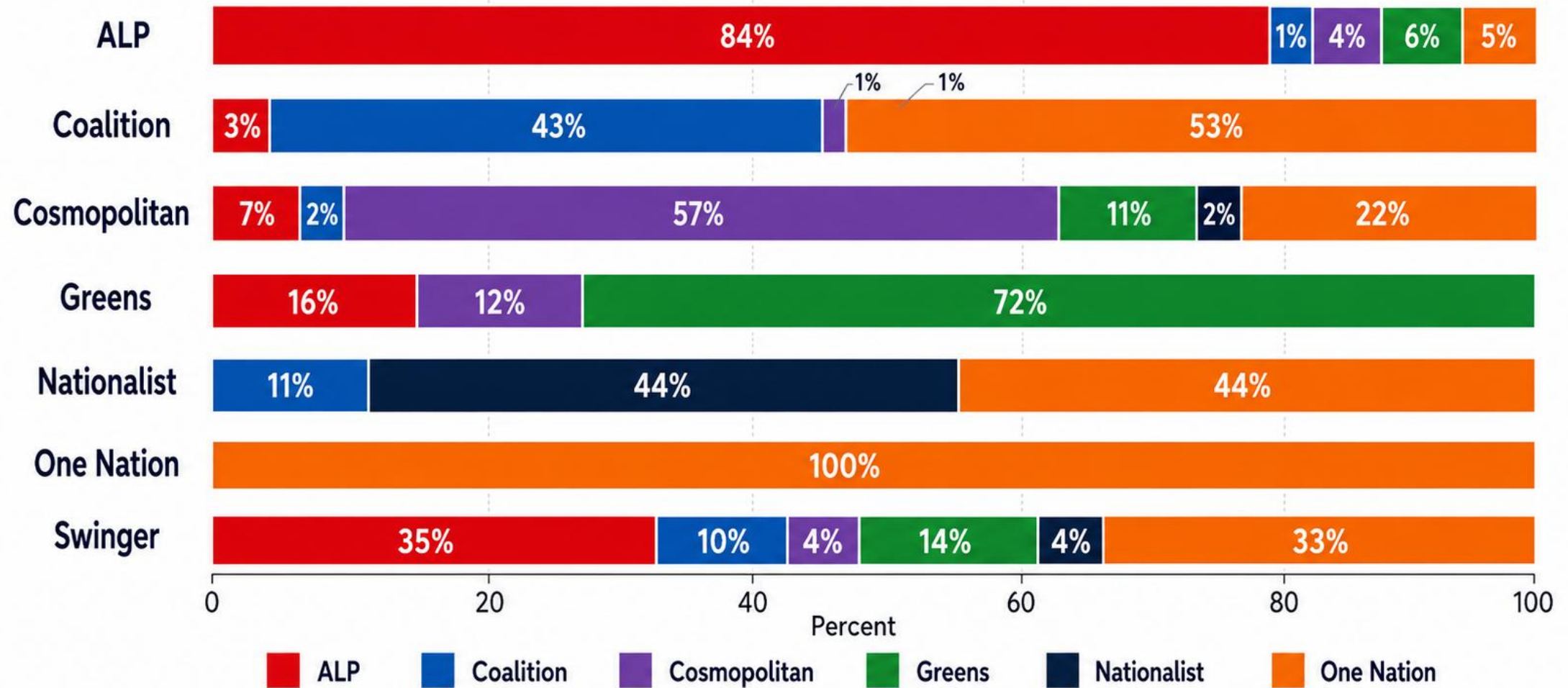


Interpretation: the 56% 'wrong direction' result is *not* a single anti-government bloc. For some voters, especially Greens, it means the government is moving in the preferred direction but *too slowly*.



Traditional tribe vs July first preference

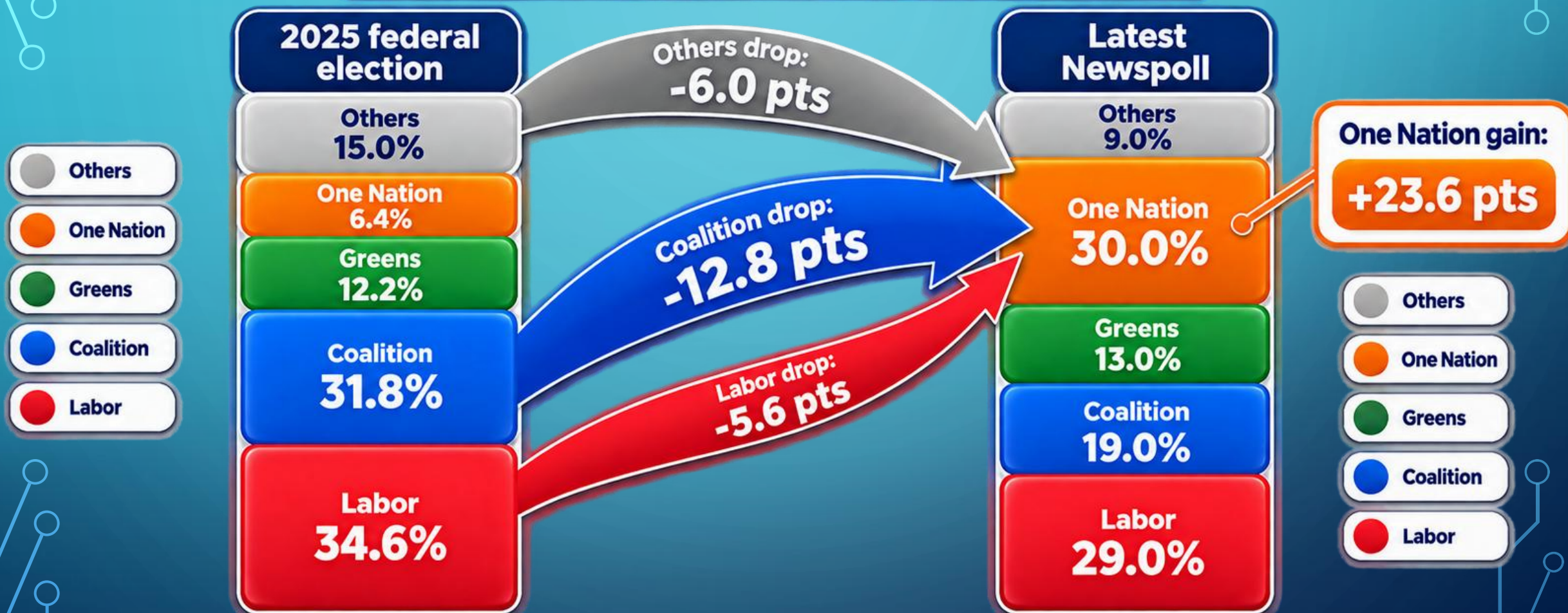
Row percentages



July total: ALP 33% | Coalition 17% | Cosmopolitan 7% | Greens 13% | Nationalist 1% | One Nation 29%

Federal primary vote movement: 2025 election to latest Newspann

Stylised comparison of party vote shares



Stylised illustration: One Nation's rise is mainly from Coalition vote loss, with additional Labor decline and a drop in other parties / others.

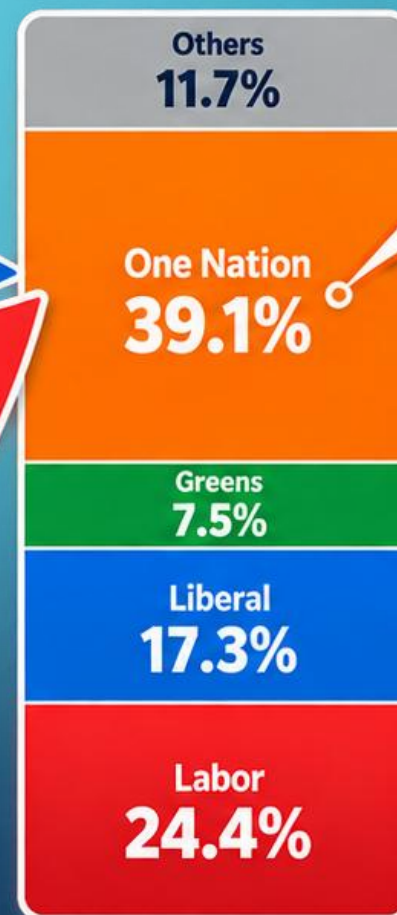
Secret Harbour: where the One Nation surge came from

Primary vote movement, 2025 election to 2026 by-election

2025 election



2026 by-election



Liberal drop: -7.67 pts

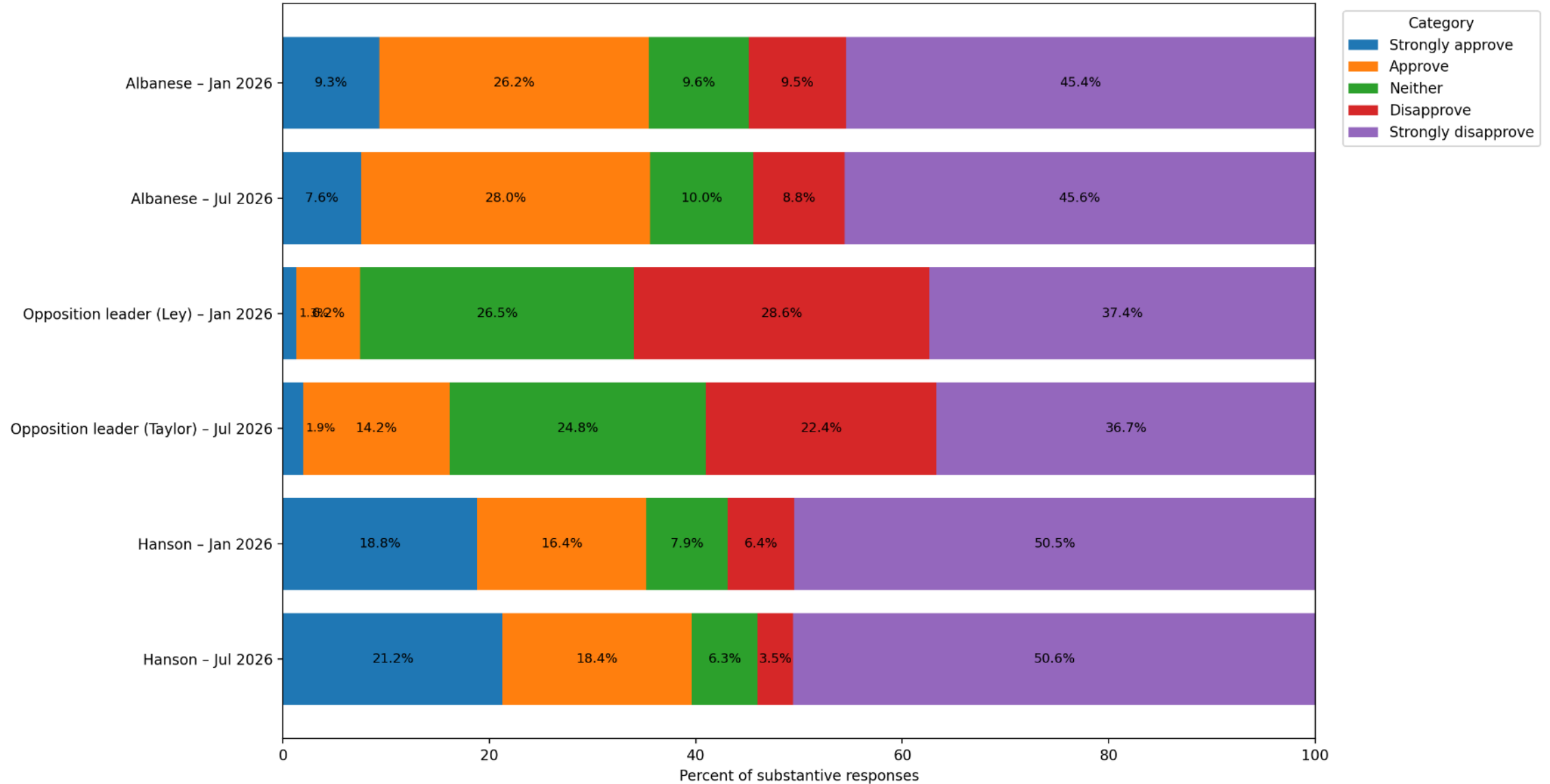
Labor drop: -22.17 pts

One Nation gain:
+30.62 pts



Stylised illustration: the scale of One Nation's gain can only be explained mainly by Labor defections, with additional Liberal defections.

Leader favourability ratings: January vs July 2026



Anthony Albanese

Main reasons for approval and disapproval — July 2026

Net approval: -18.7



Main approval reasons

- ✓ 1. Seen as steady, competent and relatively stable **(18%)**
- ✓ 2. Support for parts of Labor's policy agenda and social measures **(12%)**
- ✓ 3. Doing a reasonable job in difficult circumstances **(8%)**
- ✓ 4. Thoughtful, cautious and less scandal-prone than alternatives **(6%)**
- ✓ 5. Approve, but wish he were bolder on some issues **(6%)**



Main disapproval reasons

- ✗ 1. Dishonesty, lies and broken promises **(36%)**
- ✗ 2. Seen as left-wing, union-driven or socialist **(34%)**
- ✗ 3. Anger at policies on the economy, tax, energy, climate, housing and immigration **(16%)**
- ✗ 4. Seen as weak, gutless or lacking leadership **(9%)**
- ✗ 5. Broader complaints of incompetence and national decline **(8%)**



Percentages show the share of approval or disapproval comments mentioning each theme. Comments may fit more than one theme.

Angus Taylor

Main reasons for approval and disapproval — July 2026

↘ Net approval: -40.9



Main approval reasons

- ✓ 1. Trying hard and deserving more time in a difficult role (12%)
- ✓ 2. Economic competence, business experience and commercial background (8%)
- ✓ 3. Seen as more capable than recent alternatives and showing some potential (7%)
- ✓ 4. Approval often qualified by a wish for clearer policies and communication (7%)
- ✓ 5. Supporters like his more conservative instincts and some policy outline (5%)



Main disapproval reasons

- ✗ 1. Seen as moving right or chasing One Nation voters (13%)
- ✗ 2. Widely seen as weak, uninspiring and unable to cut through (9%)
- ✗ 3. Criticised for lacking a clear vision and too few compelling policies (5%)
- ✗ 4. Seen as unclear where he stands and not communicating well (2%)
- ✗ 5. Distrust because of past controversies, the Liberal team or motive (2%)

Percentages show the share of approval or disapproval comments mentioning each theme. Comments may fit more than one theme.

Pauline Hanson

Main reasons for approval and disapproval — July 2026

↘ Net approval: -14.3



Main approval reasons

- ✓ 1. Seen as authentic, honest and consistent over time (17%)
- ✓ 2. Viewed as a strong leader who stands up for ordinary Australians (10%)
- ✓ 3. Speaks plainly on issues others avoid, especially immigration and national direction (8%)
- ✓ 4. Support for her conservative or traditional values (7%)
- ✓ 5. Seen by some as the only major figure cutting through against Labor and the Coalition (4%)



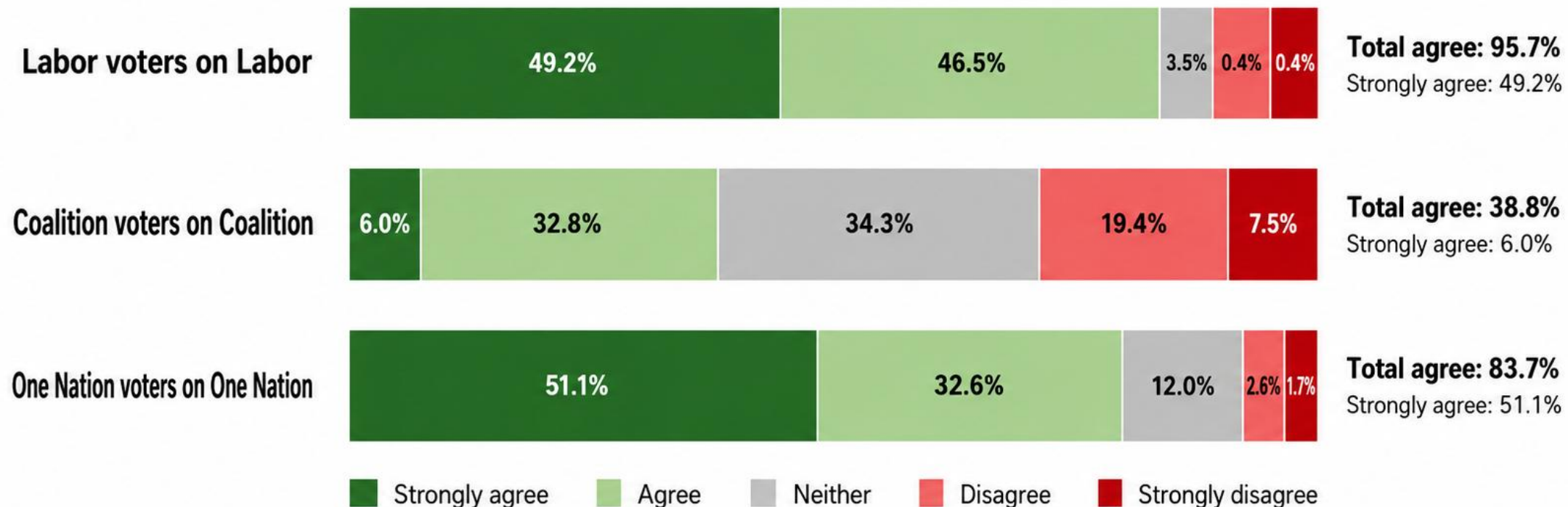
Main disapproval reasons

- ✗ 1. Seen as racist, bigoted and divisive (34%)
- ✗ 2. Associated with Trump-style populism, anti-climate views and Gina Rinehart-style politics (15%)
- ✗ 3. Criticised for social division and grievance politics around immigration and multiculturalism (11%)
- ✗ 4. Seen as thin on practical policy and stronger on slogans than solutions (5%)
- ✗ 5. Others say she lacks integrity or fitness for government (1%)

Percentages show the share of approval or disapproval comments mentioning each theme.
Comments may fit more than one theme.

Do voters think their own side deserves government?

Share of each party's current voting tribe — July 2026

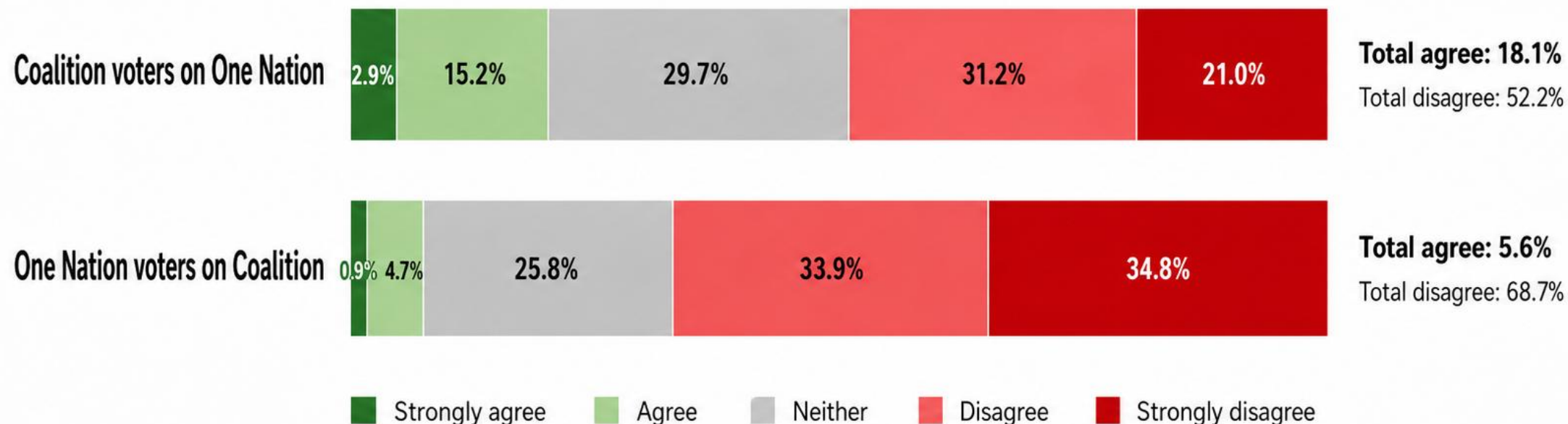


Key point: Labor and One Nation voters strongly back their own side. Coalition voters are much less convinced that the Coalition deserves government.

Substantive responses only — unsure/refused excluded.

How open are Coalition and One Nation voters to each other?

Do these voters think the other side deserves government? — July 2026

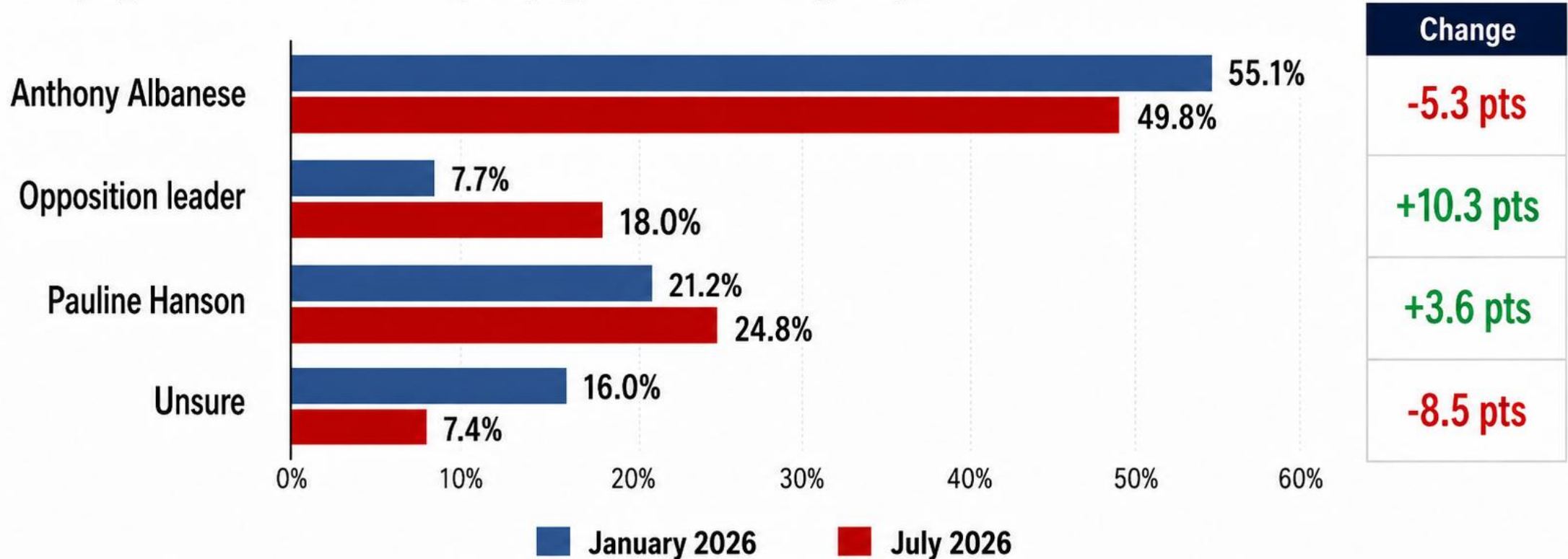


Key point: Coalition voters are materially more open to One Nation than One Nation voters are to the Coalition — but both groups are still net sceptical of the other side.

Substantive responses only — unsure/refused excluded.

Preferred prime minister: January vs July 2026

January Opposition leader = Sussan Ley; July Opposition leader = Angus Taylor.

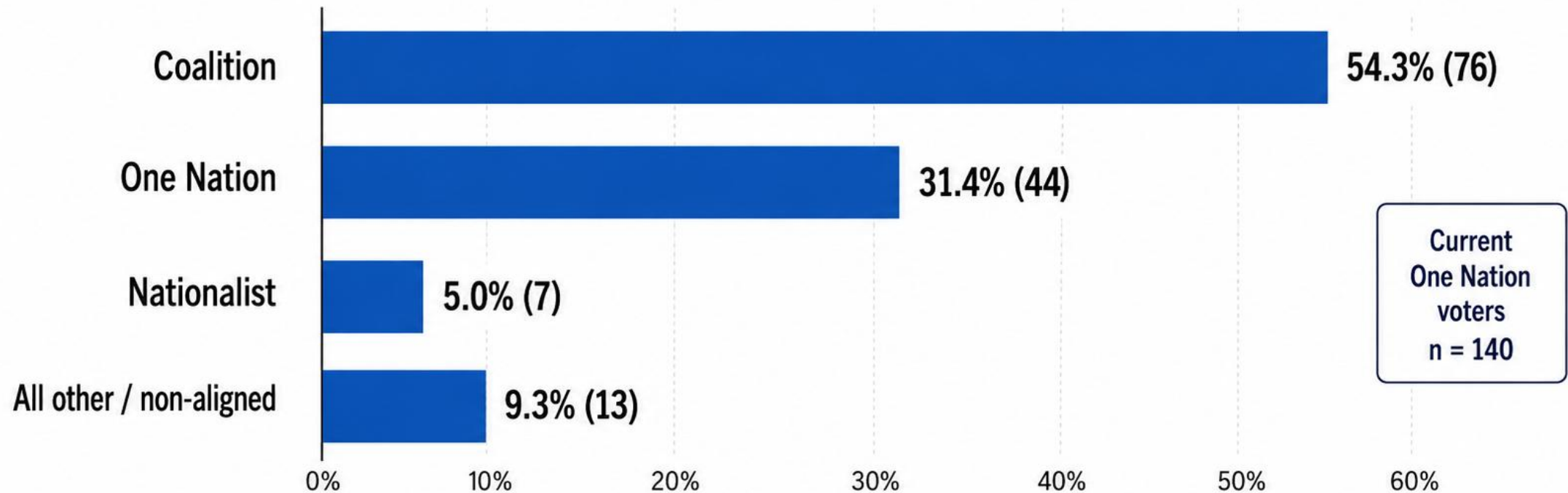


Key point: Albanese loses ground, the Opposition leader gains strongly, Hanson rises modestly, and uncertainty roughly halves.

January n = 557; July n = 767.

Where did the January One Nation surge come from?

Current One Nation voters by previous voting tribe — January 2026



Key point:

The January One Nation surge was mainly a Coalition defection story: a majority of current ON voters had voted Coalition previously.

Why did these voters move?

Authority was the first theme in Coalition → One Nation switchers' explanations

Push from the Coalition

- Lack of leadership
- Coalition in disarray
- Stands for nothing
- Too weak or too moderate on key issues

“lack of leadership”

“the Coalition is in disarray and stands for nothing”

“One Nation has a clear vision”

“take the hard stand”

“consistent message spanning 30 years”

Pull to One Nation

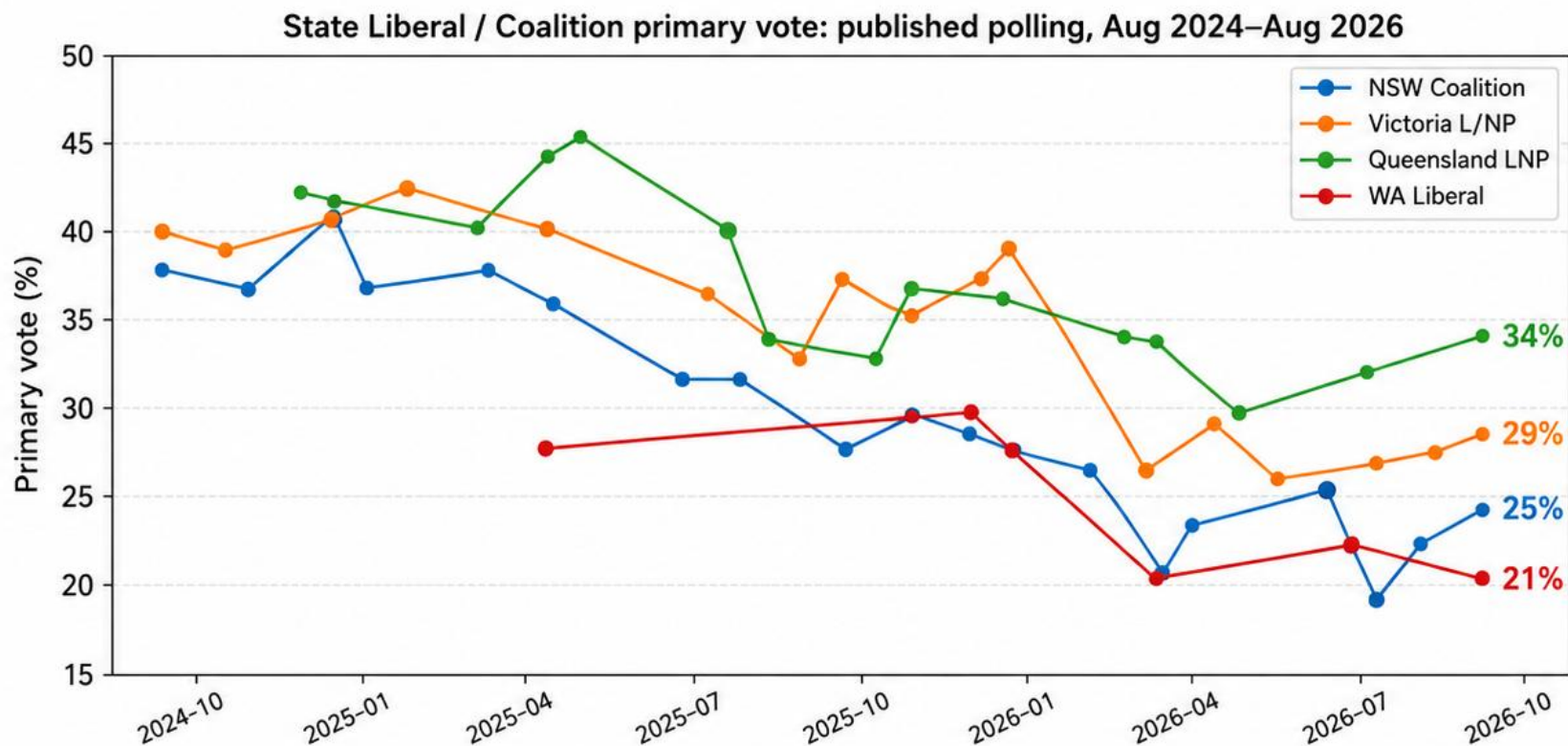
- Clearer vision
- Willing to take a hard stand
- Consistent over time
- Stronger on Australian values and direction

Key point:

The switch was not just about ideology. Many respondents were looking for authority, coherence and decisiveness.

State Liberal brand damage is real

Published polling, Aug 2024–Aug 2026



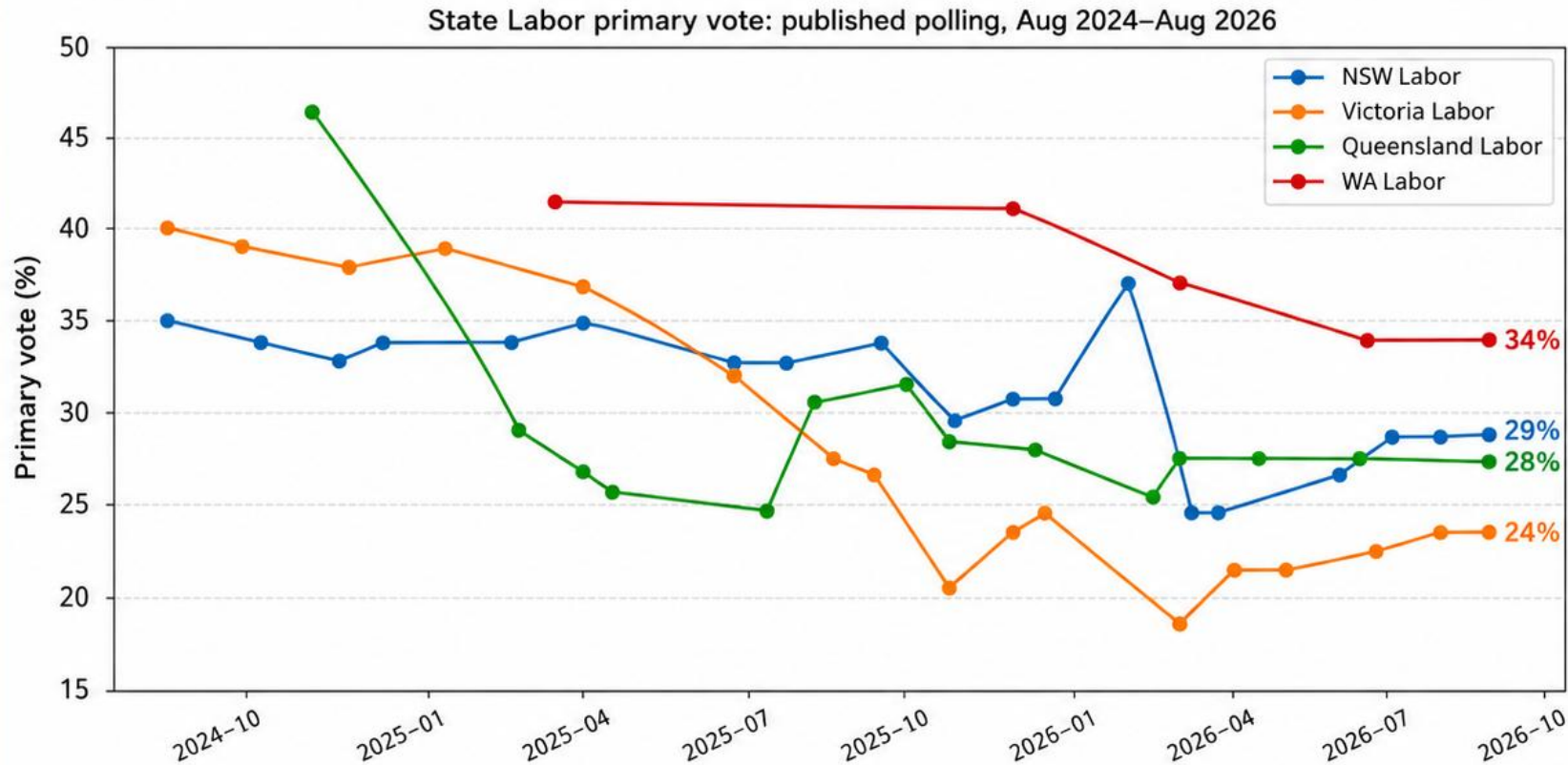
Latest published levels

- Queensland 34%
- Victoria 29%
- NSW 25%
- WA 21%

Key point: Liberal brand damage is real across the states — even in Queensland, where the LNP performs best, it has taken a significant hit from its post-election highs. Queensland remains the strongest state branch, but the broader pattern is decline.

State Labor is weak too

Published polling, Aug 2024–Aug 2026



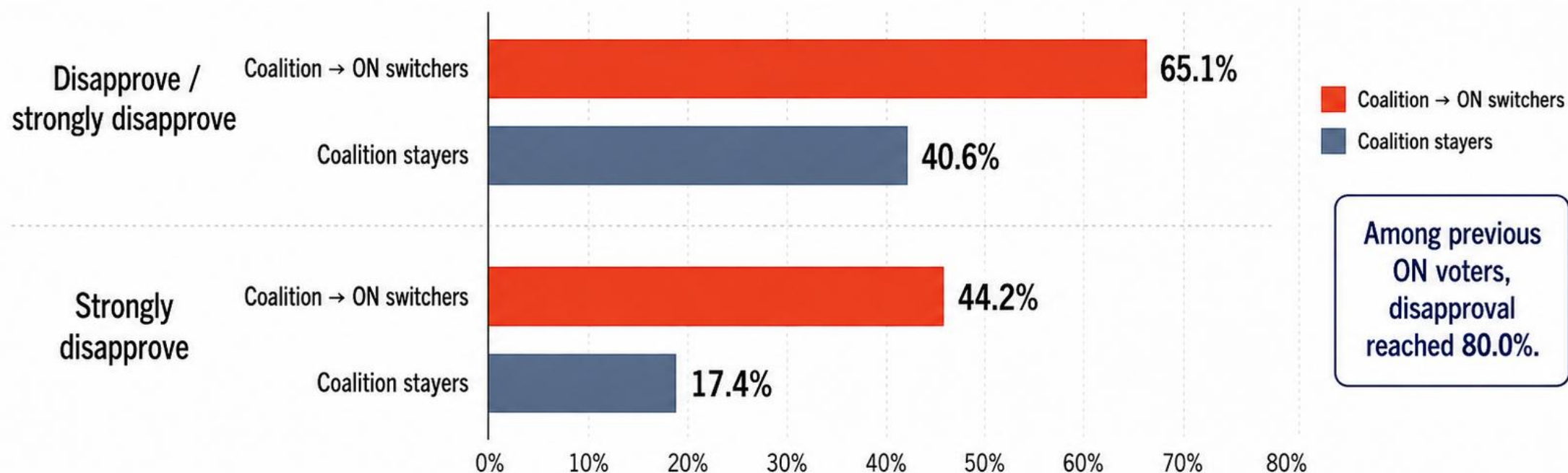
Latest published levels

- **WA 34%**
- **NSW 29%**
- **Queensland 28%**
- **Victoria 24%**

Key point: Liberal brand damage is real — but Labor is hardly dominant in the states. In Queensland and Victoria, where the Liberals/LNP poll relatively best, Labor polls relatively worst.

COVID looks like the underlying trust breach

Views on the federal government's COVID performance among previous Coalition voters — January 2026



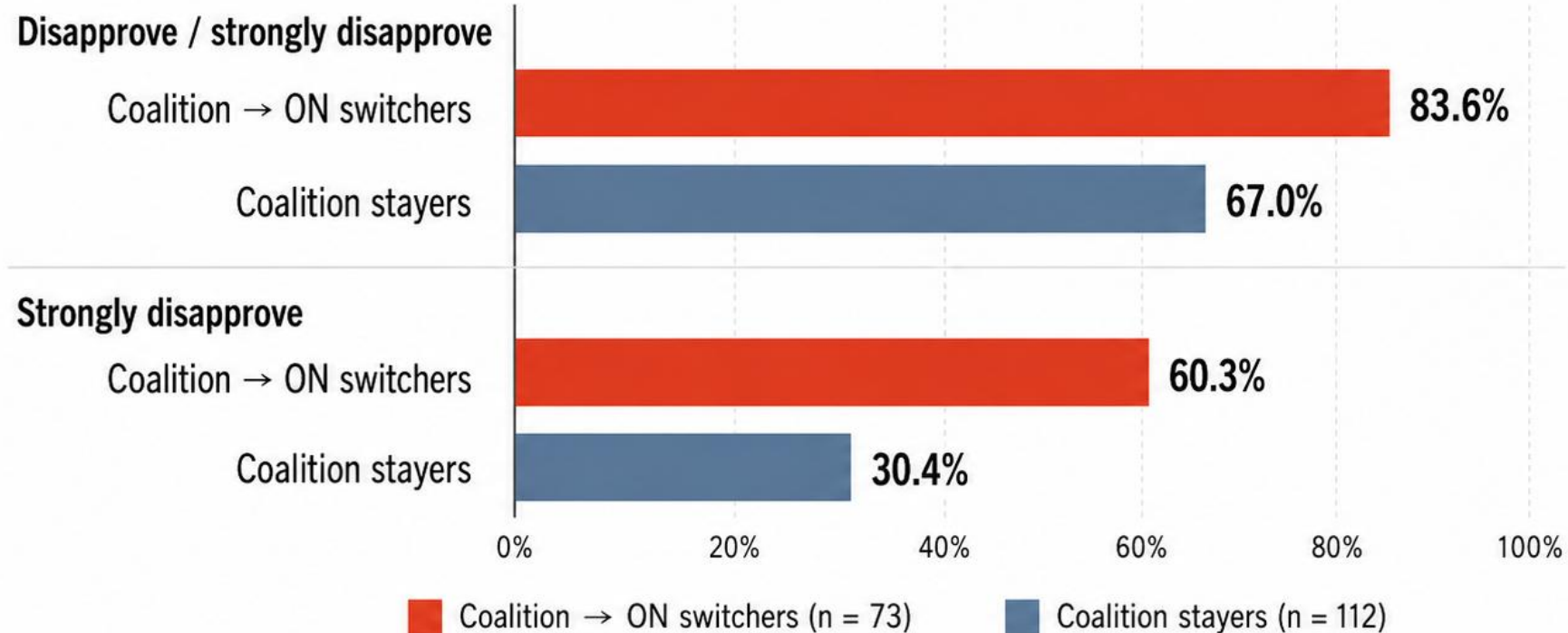
Respondents who answered this question:
switchers $n = 43$; stayers $n = 69$

Key point:

COVID appears to have created a deeper breach of trust in government power on the right.

The antisemitism bill hit the same trust nerve

Views on the antisemitism bill among previous Coalition voters — January 2026



Key reasons cited by switchers:

- free speech
- state power
- vague definitions
- fear of misuse

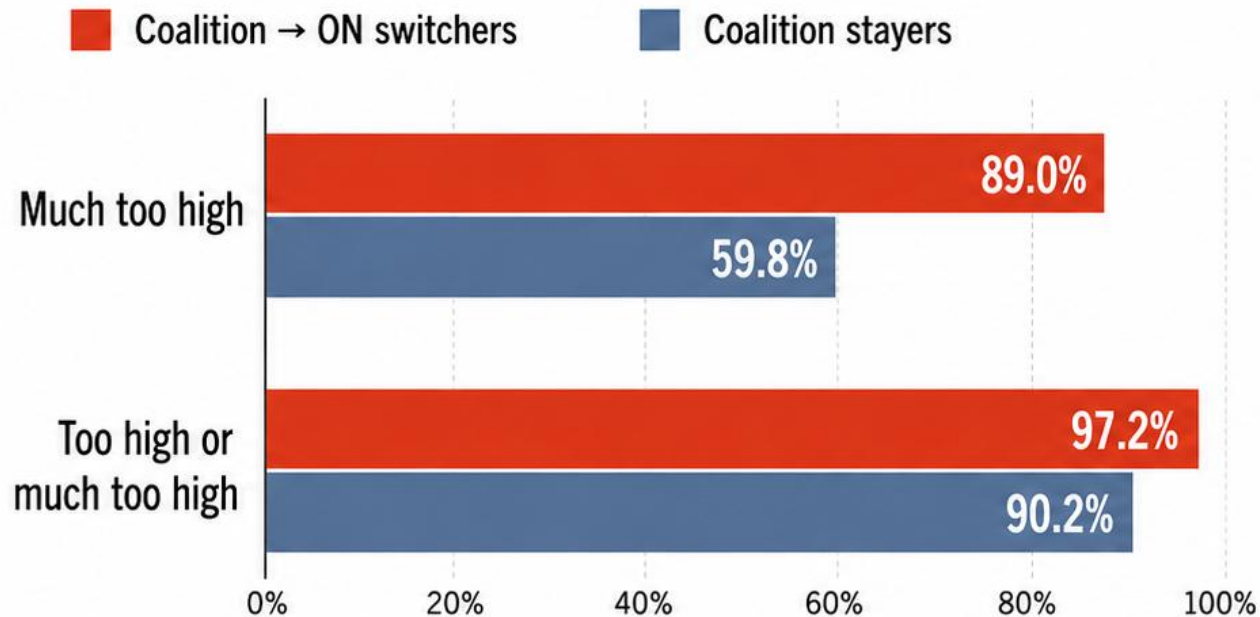
Respondents who answered this question: switchers n = 73; stayers n = 112.

Key point:

After COVID, speech-related legislation intensified distrust of government power among defectors.

Immigration was the issue where many defectors landed

Views on immigration among previous Coalition voters — January 2026



Respondents who answered this question:
switchers $n = 73$; stayers $n = 112$

Switchers often talked about

- sovereignty and national direction
- values and cultural fit
- screening and vetting
- who is being admitted

Coalition stayers more often stressed

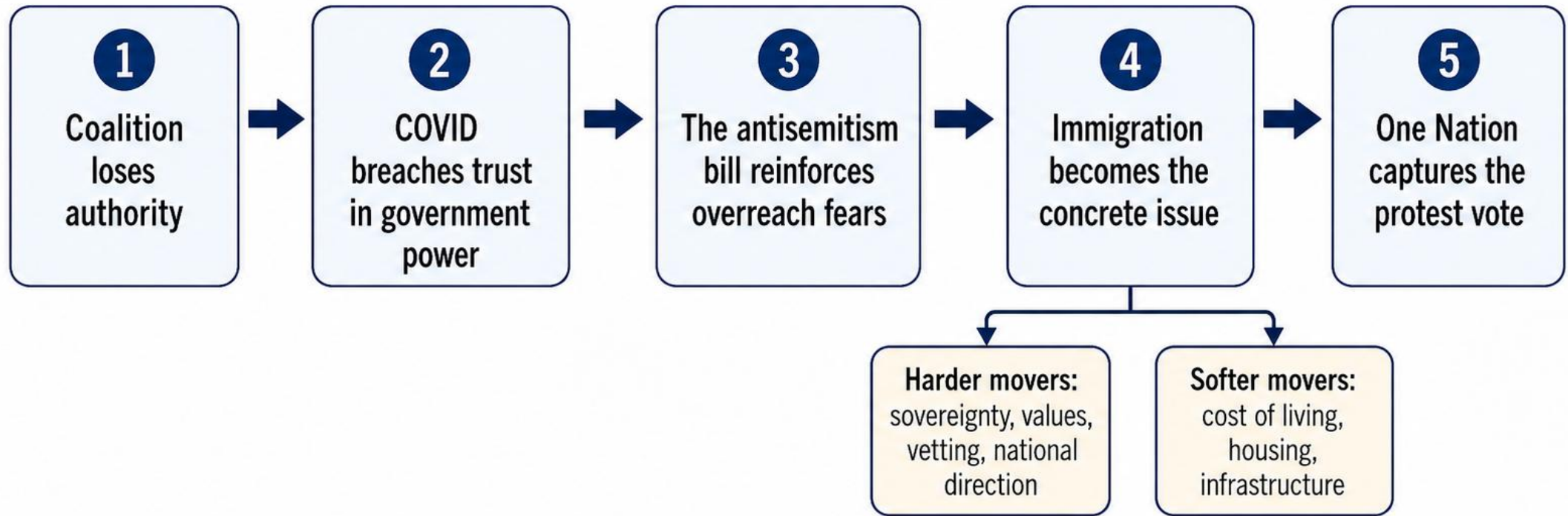
- cost of living
- housing
- infrastructure
- pressure on services

Key point:

Both groups thought immigration was too high. The difference was intensity — and defectors more often tied it to sovereignty and cultural control.

How the January One Nation surge seems to work

A synthesis of the January evidence



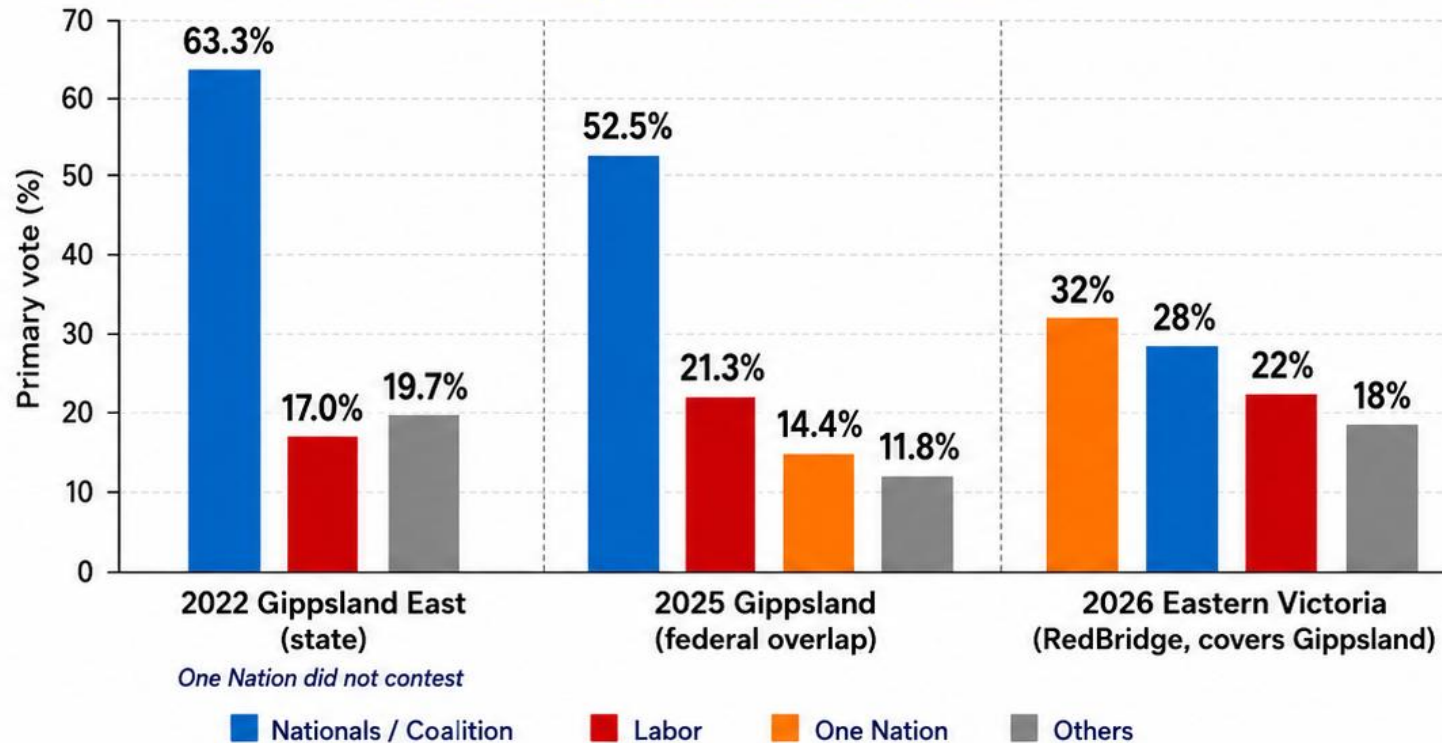
Key point:

Immigration matters — but the upstream drivers appear to be authority and trust.

Gippsland East: first on primaries may not be enough

Publicly released RedBridge context, 2022–2026

What the public numbers show



What this means

- RedBridge publicly shows One Nation leading the Eastern Victoria region on 32%.
- Gippsland East is one of the key seats flagged as vulnerable to One Nation.
- But no clear public seat-level time series for Gippsland East itself was located.
- So the regional RedBridge figure is the public guide, not a full district trend line.

If the final count is One Nation vs Nationals/Coalition...

One Nation

Nationals / Coalition

Labor

Labor preferences likely flow to Nationals/Coalition

Primary lead ≠ guaranteed seat win

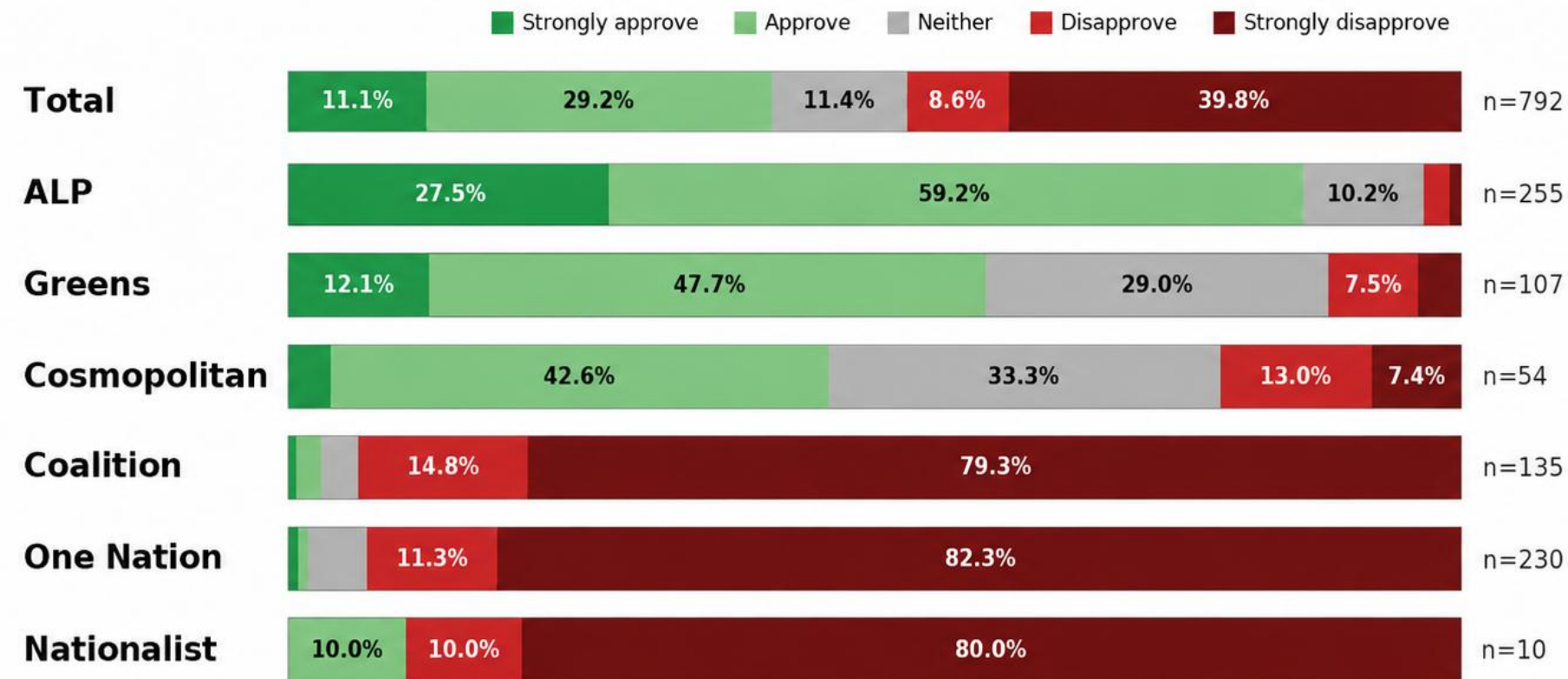
Key point:

This is exactly the kind of seat where One Nation can lead on first preferences but still lose after preferences.

If Labor finishes third, its preferences are likely to elect the Nationals rather than One Nation.

Budget approvals by voting tribe

Federal Budget approval by current voting tribe — July 2026



Total approve

Total: 40.3%
ALP: 86.7%
Greens: 59.8%
Cosmo: 46.3%
Coalition: 3.0%
ON: 1.7%

Total disapprove

Total: 48.4%
ON: 93.5%
Coalition: 94.1%
Nationalist: 90.0%

Key point: Labor voters overwhelmingly approved; Coalition and One Nation voters overwhelmingly rejected it. Greens and cosmopolitan voters were supportive but much less settled.

Why voters approved or rejected the Budget

Reason coding by voting tribe — July 2026

Percentages show share of support or opposition comments mentioning each theme. Comments may fit more than one theme.

Supporters: tax reform and housing

ALP supporters n=205



Greens supporters n=58



Cosmopolitan supporters n=22



Opponents: trust, tax and aspiration

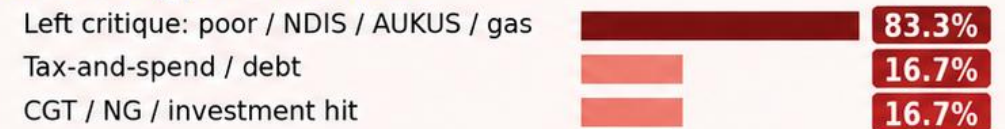
Coalition opponents n=111



One Nation opponents n=197



Greens opponents n=12



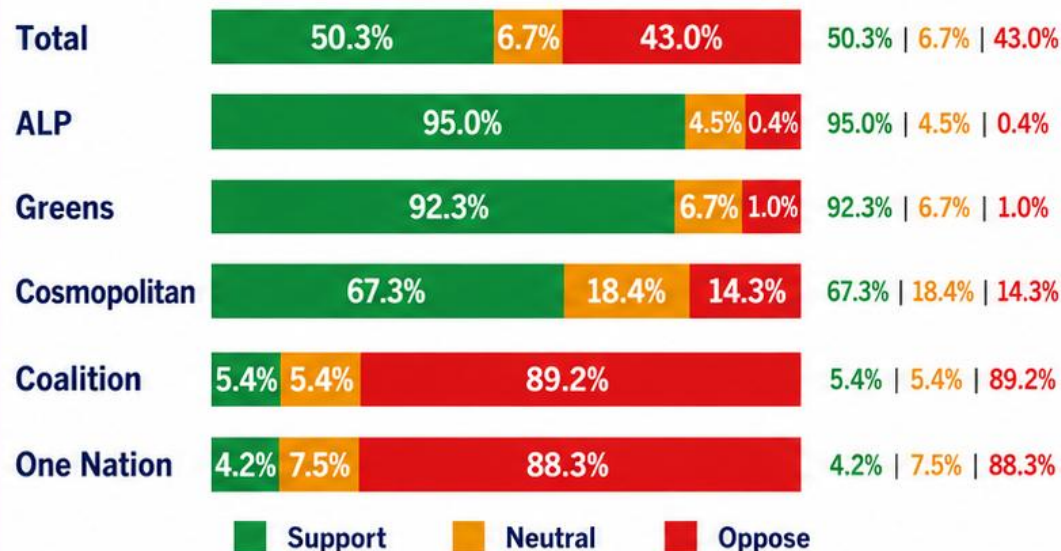
Key point: The Budget united Labor's supporters around tax and housing reform, but united the right against it as a breach of trust and an attack on aspiration, investment and growth.

Housing tax measures by voting tribe

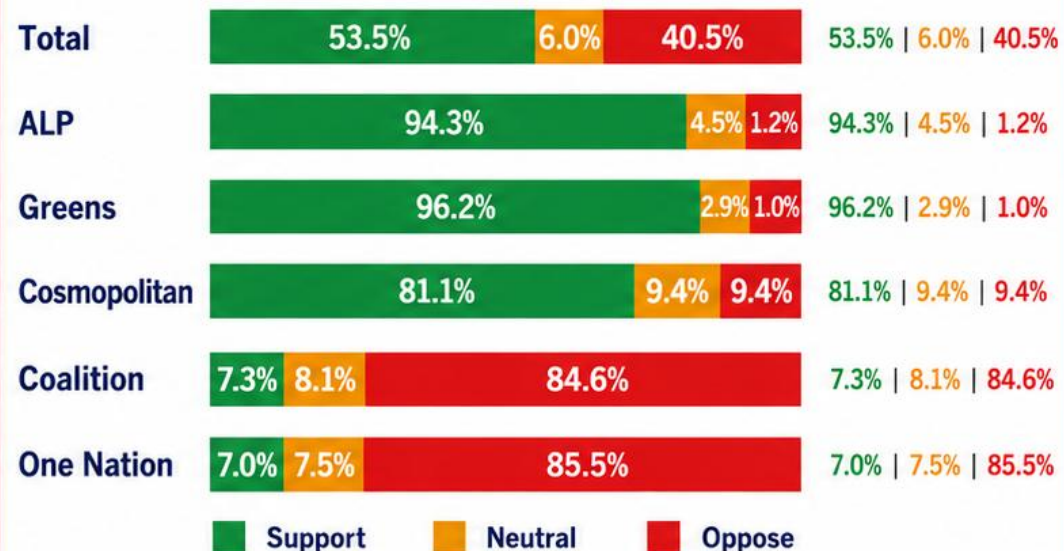
Capital gains tax and negative gearing — July 2026

Substantive responses only. Support = Very good + Good; Neutral = Neither good nor bad; Oppose = Bad + Very bad.

Capital gains tax changes



Negative gearing abolished



Key point:

The two housing tax measures split the electorate almost identically: Labor and Greens strongly support both, Coalition and One Nation strongly oppose both, and Cosmopolitan voters lean supportive — especially on negative gearing.

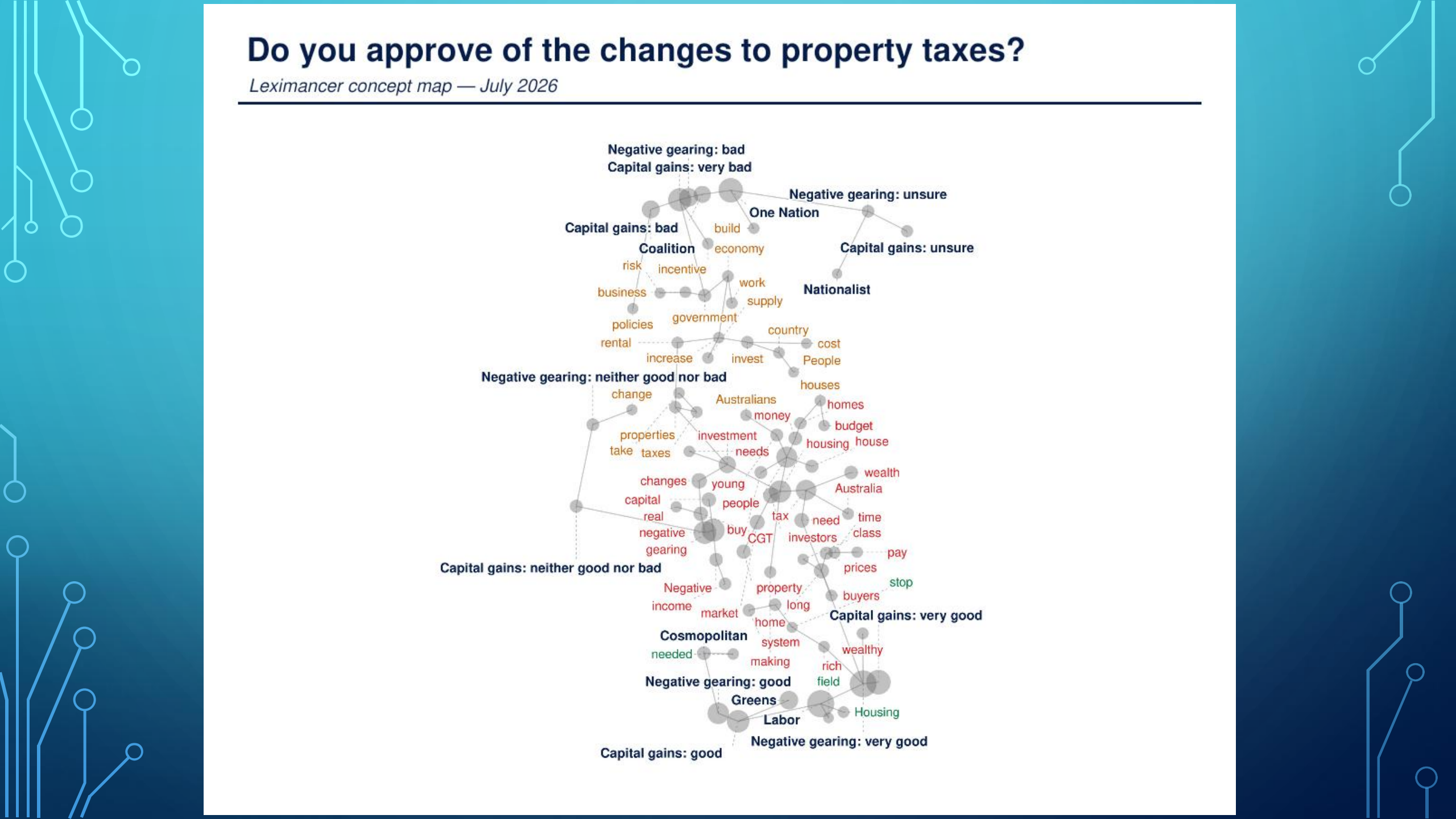
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Do you approve of the changes to property taxes?

Leximancer concept map — July 2026

The concept map illustrates the following clusters and relationships:

- Top Cluster (Negative/Unsure):** Includes terms like "Negative gearing: bad", "Capital gains: very bad", "Negative gearing: unsure", "One Nation", "Capital gains: bad", "Coalition", "build", "economy", "risk", "incentive", "business", "work", "supply", "Nationalist", "Capital gains: unsure", "policies", "rental", "increase", "invest", "country", "cost", "People", "houses", "homes", "budget", "housing", "house", "wealth", "Australia", "time", "class", "pay", "prices", "stop", "buyers", "property", "long", "home", "system", "making", "rich", "field", "Housing", "Labor", "Negative gearing: very good", "Capital gains: good", "Negative gearing: good", "Greens", "Cosmopolitan", "needed", "market", "income", "negative", "gearing", "buy", "CGT", "investors", "need", "tax", "people", "young", "changes", "capital", "real", "negative", "gearing", "properties", "take", "taxes", "investment", "needs", "money", "Australians", "change", "Negative gearing: neither good nor bad", "Capital gains: neither good nor bad".
- Bottom Cluster (Positive/Good):** Includes terms like "Negative gearing: good", "Greens", "Labor", "Capital gains: good", "Negative gearing: very good", "Capital gains: good", "Negative gearing: good", "Greens", "Labor", "Capital gains: good", "Negative gearing: very good".



Why tribes backed or opposed the housing tax changes

Combined reason coding for capital gains tax and negative gearing – July 2026

Percentages show the share of support or opposition comments mentioning each theme. Comments may fit more than one theme. Includes respondents who supported both measures or opposed both measures.

Supporters: fairness and housing access

ALP supporters n=192

Tax fairness / ending rorts		29.2%
Housing affordability / first home buyers		12.0%
Housing should not be an investment vehicle		4.2%

Greens supporters n=84

End property-investor tax advantages		69.0%
Tax fairness / tax wealth not income		34.5%
Go further / broader reform		19.0%

Cosmopolitan supporters n=24

Housing affordability / housing as a right		37.5%
Tax fairness / curb rorts / inequality		25.0%
Reduce property speculation / market distortion		20.8%

Opponents: supply, aspiration and trust

Coalition opponents n=84

Less investment / less supply / higher rents		47.6%
Need supply-side reform, not new taxes		10.7%
Hurts aspiration / wealth creation / retirement		10.7%
Broken promise / dishonesty / rushed		6.0%

One Nation opponents n=148

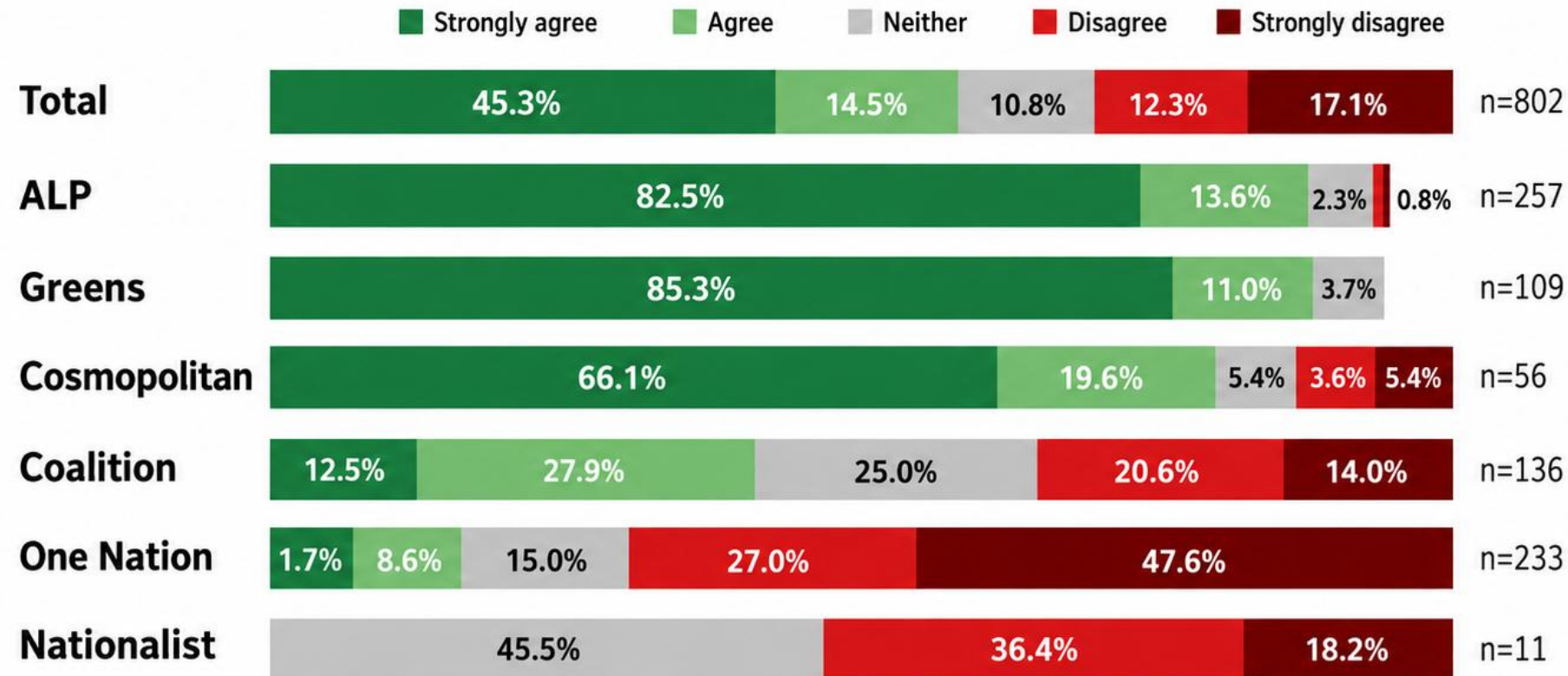
Less investment / less supply / higher rents		43.9%
Hurts aspiration / self-reliance / wealth creation		13.5%
Broken promises / distrust / government control		10.1%
Taxes too high / bad economics / wrong fix		4.7%

Key point:

Supporters see the changes mainly as a fairness and housing-affordability reform. Opponents see them mainly as a threat to investment, rental supply, aspiration and trust.

Multiculturalism by voting tribe

Support for multiculturalism by current voting tribe — July 2026



Total agree

Total: 59.7%

ALP: 96.1%

Greens: 96.3%

Cosmo: 85.7%

Coalition: 40.4%

ON: 10.3%

Total disagree

Total: 29.4%

ON: 74.7%

Nationalist: 54.5%

Coalition: 34.6%

Key point:

Labor, Greens and Cosmopolitan voters strongly backed multiculturalism; One Nation voters mostly rejected it; Coalition voters were divided, while Nationalists leaned negative or neutral.

Why tribes back or reject multiculturalism

Themes in open-text definitions — July 2026

Overall result: 59.7% agree | 10.8% neither | 29.4% disagree

Theme percentages show the share of each tribe's definition comments mentioning that theme. Codes overlap.

Supportive tribes

ALP 96.1% agree | Greens 96.3% agree | Cosmo 85.7% agree

Many cultures / coexistence / harmony

ALP 42.0%

Greens 44.8%

Cosmo 33.3%

Common civic values / one framework

ALP 10.1%

Greens 13.5%

Cosmo 13.3%

Diversity enriches Australia / immigrant nation

ALP 5.9%

Greens 8.3%

Cosmo 6.7%

Supportive tribes mostly define multiculturalism as coexistence and respect, not borderless difference.

Sceptical or conditional tribes

Coalition 40.4% agree | 25.0% neither | 34.6% disagree

One Nation 74.7% disagree | Nationalist 54.5% disagree

Assimilation / shared Australian values

Coalition 16.5%

ON 18.4%

Nat 30.0%

Division / tribalism / ghettos

Coalition 6.6%

ON 13.2%

Nat 40.0%

Imported conflict / weak vetting / anti-Western values

Coalition 1.7%

ON 3.8%

Nat 0.0%

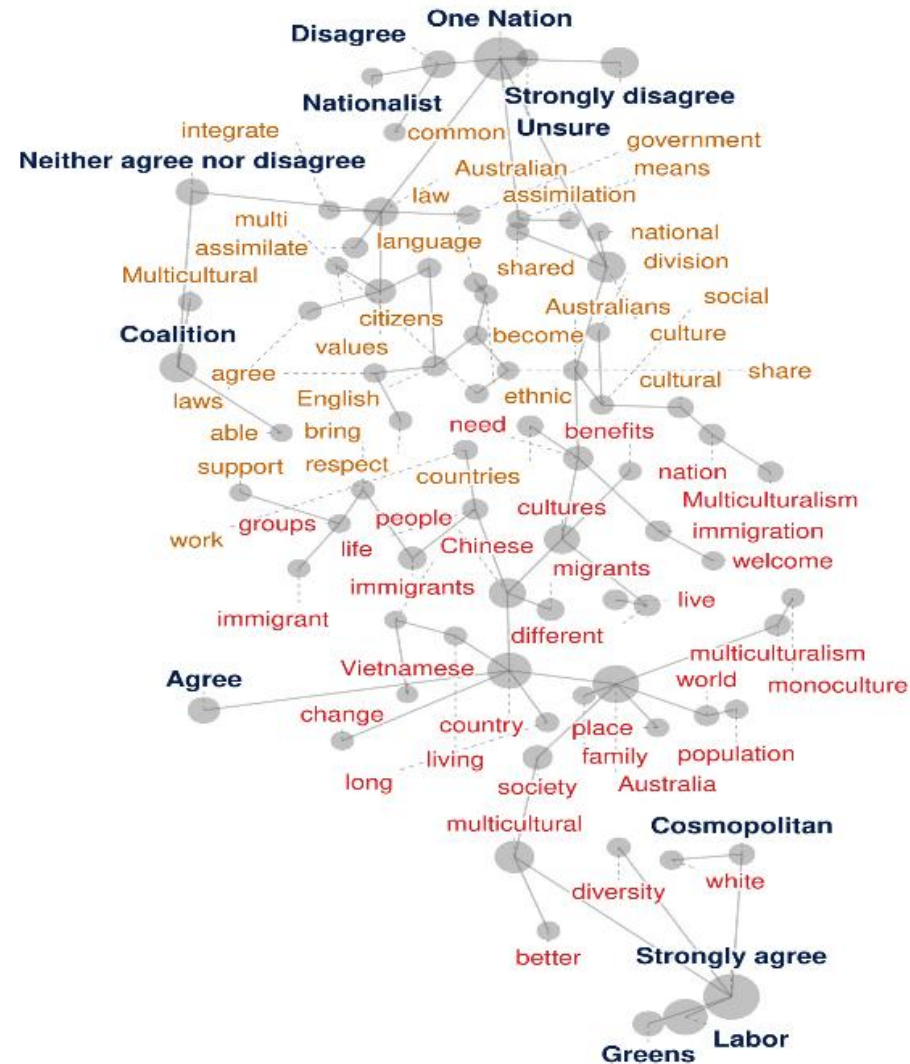
Sceptical tribes differ more in intensity than in frame: the core concern is social cohesion and assimilation.

Key point:

There is substantial overlap. Supportive tribes emphasise coexistence, while sceptical tribes emphasise assimilation and cohesion. The disagreement is often about balance and trust, not simply whether different cultures exist.

Should Australia be a multicultural country?

Leximancer concept map — July 2026



What multiculturalism means, by voting tribe

Concepts in open-text definitions · July 2026

Percentage of included replies in each group; a reply can contain several concepts.

	Total n=664	Labor n=222	Coalition n=102	One Nation n=199	Greens n=93	Cosmopolitan n=38	Nationalist* n=10
Diverse origins and cultures	50.9%	64.0%	49.0%	31.7%	66.7%	47.4%	30.0%
Harmony, respect and inclusion	35.5%	50.9%	24.5%	12.1%	55.9%	52.6%	20.0%
Freedom to retain cultural heritage	18.5%	20.7%	19.6%	10.1%	28.0%	21.1%	30.0%
Common laws and civic values	23.6%	20.3%	32.4%	24.1%	22.6%	21.1%	20.0%
Integration and Australian identity	30.4%	25.7%	47.1%	35.2%	19.4%	18.4%	20.0%
Cultural exchange and enrichment	17.3%	24.3%	9.8%	11.1%	24.7%	13.2%	10.0%
Separation, enclaves and division	12.8%	1.4%	14.7%	31.2%	0.0%	2.6%	40.0%
Conflict or loss of Australian culture	16.0%	3.2%	15.7%	37.7%	4.3%	5.3%	20.0%

664 included replies · unweighted · overlapping qualitative codes

* Nationalist base is only 10. These are concept frequencies, not approval rates.

Source: Chat_July_Data_Only.csv, Multicultural_Define x First_Pref_Tribe. Fresh interpretive coding, 2 September 2026.

Blanks, opt-outs, bare cross-references and non-answers excluded. Other/evaluative replies remain in the base; concepts do not sum to 100%.



Leximancer concept map — July 2026

Questions & answers

