

Blueprint **Institute**

Winning back the Coalition's missing middle

YouGov commissioned polling, July 2025



About Blueprint Institute

Every great achievement starts with a blueprint.

Blueprint Institute is an independent public policy think tank. The challenges our nation faces go beyond partisan politics. We have a once-in-a-generation opportunity to rethink and recast Australia to be more balanced, prosperous, resilient, and sustainable. We design blueprints for practical action to move Australia in the right direction.

For more information on the Institute please visit our website: blueprintinstitute.org.au

Attribution

This report may be cited as: Winning back the Coalition's missing middle, Blueprint Institute, 2025.

All material published or otherwise created by Blueprint Institute is licensed under a Creative Commons Attribution.

At the 2025 House of Representatives Election the number of Australians allocating their primary vote to candidates from the Liberal and National Parties (including their associated state and territory parties) hit a historic low of 31.8%. Unlike Labor, whose declining vote share has historically flowed back through the Greens, the Coalition cannot win elections from such a low primary vote base.

As demonstrated by this analysis of recent research conducted on behalf of Blueprint by YouGov, correcting this issue will be extremely difficult if the Coalition's current policy approach and public perceptions of this approach continue.

About the research

Blueprint Institute commissioned YouGov to conduct a survey of 5,007 Australian voters from 10-29 July 2025. Data was weighted by gender, age, region, education, income and 2025 Federal vote to reflect the latest ABS population estimates for Australians 18+.

Results of this survey were then used as inputs to model certain responses across Commonwealth Electoral Divisions using multilevel regression with post-stratification (MRP).

MRP is a sophisticated electoral research model pioneered by YouGov. It combines survey data with electorate level information such as population density, education levels, and past election results to provide deeper insights.

More than just a poll, MRP applies data science to predict outcomes with high accuracy.

The success of the MRP modelling approach to political polling has been well documented. YouGov was closest to calling the outcome of not just the recent Australian federal election, but recent elections in the UK, Spain, Canada and Germany.

YouGov is a member of the Australian Polling Council, which means it abides by a Code of Practice and a Quality Mark to allow journalists to identify professionally conducted polls with appropriate disclosure standards.

Overview of key findings

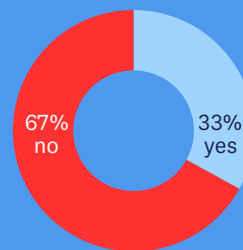
The Coalition has extremely limited opportunity to increase its primary vote among those who would currently consider voting for one of its candidates

67% of all voters would not currently consider voting for the Coalition. The electorates where a significant number of non-Coalition voters would consider voting for the Coalition are predominantly safe seats or held by independent MPs.

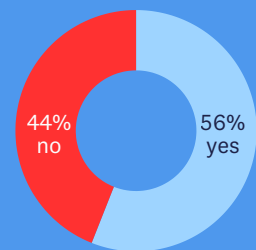
More than half (53%) of those who have previously voted for the Coalition would not do so if an election were held today. This cohort is referred to in this report as ex-Coalition voters.

There is a particular disconnect evident in working families with younger children.

Q: If a Federal election was held today, would you *consider* voting for the Coalition as your first preference?



All voters

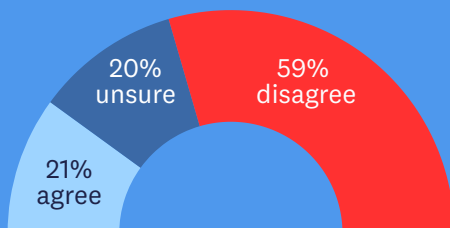


Ex-Coalition voters

Ex-Coalition voters perceive the Coalition as out of touch

Q: Do you agree that the Liberal-National Coalition is in touch with modern Australia?

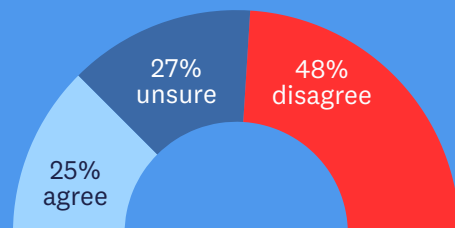
Sample: Ex-Coalition voters



A majority of ex-Coalition voters perceive the Coalition parties to be out of touch with the nation in general.

Q: Do you agree that the Liberal-National Coalition is aligned with my personal values and priorities?

Sample: Ex-Coalition voters

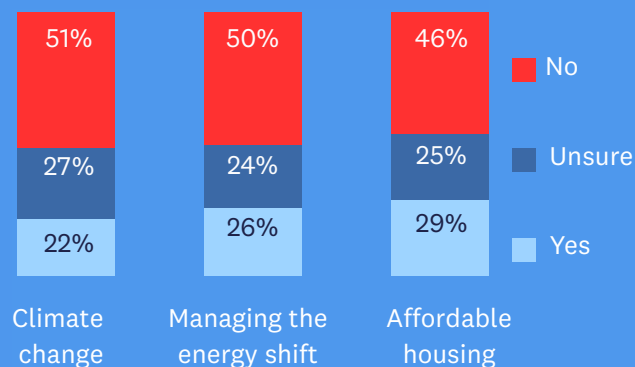


A large plurality of Ex-Coalition voters perceive the Liberal & National parties to be out of touch with them personally.

Disillusionment amongst ex-Coalition voters is unevenly focussed across policy areas: 51%, 50% and 46% of voters say the Coalition is not aligned with their personal values and priorities on climate change, renewable energy and affordable housing respectively, whilst pluralities say that the Coalition is aligned with their priorities in regards to economic management, infrastructure and national security / foreign affairs.

Q: Do you feel the priorities of the Liberal-National Coalition (LNP) align with your own priorities on the following policy areas?

Sample: Ex-Coalition voters

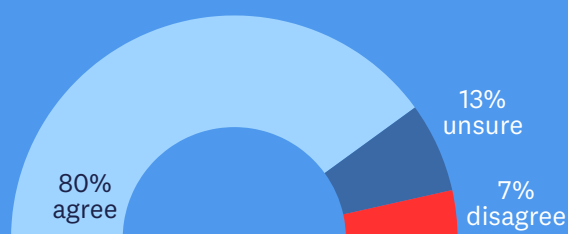


There are clear opportunities to redress these shortcomings through better policy

80% of ex-Coalition voters (and 74% of independent voters) agree that the Liberal and National Parties need to present a more comprehensive and credible policy platform before they would consider voting for them.

Q: The Liberal-National Coalition need to present a more comprehensive and credible policy platform before I'd consider voting for them at the next election.

Sample: Ex-Coalition voters



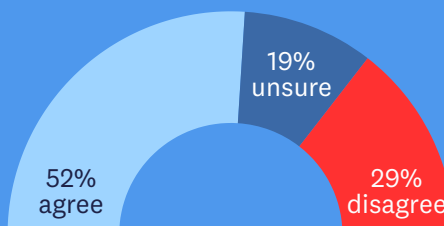
Climate change is a key threshold issue for voters

52% of ex-Coalition voters say that they will only consider a party ready to govern if they have credible policies to address climate change.

According to MRP this view is likely to enjoy support from a plurality of voters in 149 of 150 Electoral Divisions and from an outright majority in 71 of these - including 20 seats formerly held by the Coalition.

Q: I would only consider a party ready to govern if they have credible policies to address climate change and its impacts.

Sample: Ex-Coalition voters



The Coalition is only appealing to a narrow slice of the electorate

The research finds that if an election were held today, two-thirds of voters would not even consider voting for the Liberal or National Parties with their first preference.

At 33%, the Coalition's consideration ceiling is just five percentage points higher than the 28% primary vote intention captured from the same sample. In contrast, 42% of voters say they would consider voting for Labor, giving the government a ceiling nine points higher than their vote intention.

If the Coalition is to regain government through an improvement in the primary vote, it will need to do more than appeal to its base or convince undecided voters: it must expand the number of people who are willing to consider its candidates as an option.

Meaningful opportunities to improve the Coalition primary vote are limited at these levels of consideration

Using MRP, consideration was modelled across Commonwealth Electoral Divisions and compared to primary vote from the 2025 Federal Election to assess the greatest opportunities for improvement.

The difference between actual vote and potential vote (i.e. consideration) for any given Electoral Division represents the specific opportunity to grow the Coalition primary vote in that seat. It is referred to here as consideration space for simplicity.

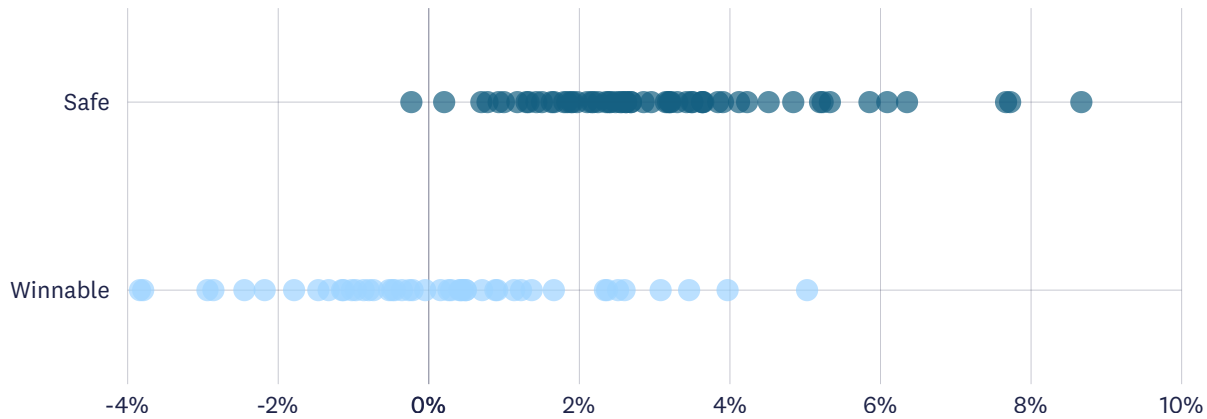
The median consideration space for the Coalition in all Electoral Divisions is just under 0.7%. The model predicts that there should be 37 Electoral Divisions (the top quartile) - where the number of people who say they would consider voting for the Coalition exceeds the actual Coalition primary vote by 2.6% or more. That seems like ample room for improvement.

However, winnable seats for the Coalition are hard to come by in this range.

The median consideration space in non-held winnable Electoral Divisions¹ is only 0.05%, indicating that there is very little room for the Coalition vote to grow in the seats where it needs to grow. Most of the opportunities are in safe seats held by Labor (which accords with less intensive Coalition campaign efforts typically expended in safe seats).

¹Presumed for the sake of this exercise to be <10% 2CP.

Distribution of consideration space in safe versus winnable non-Coalition seats



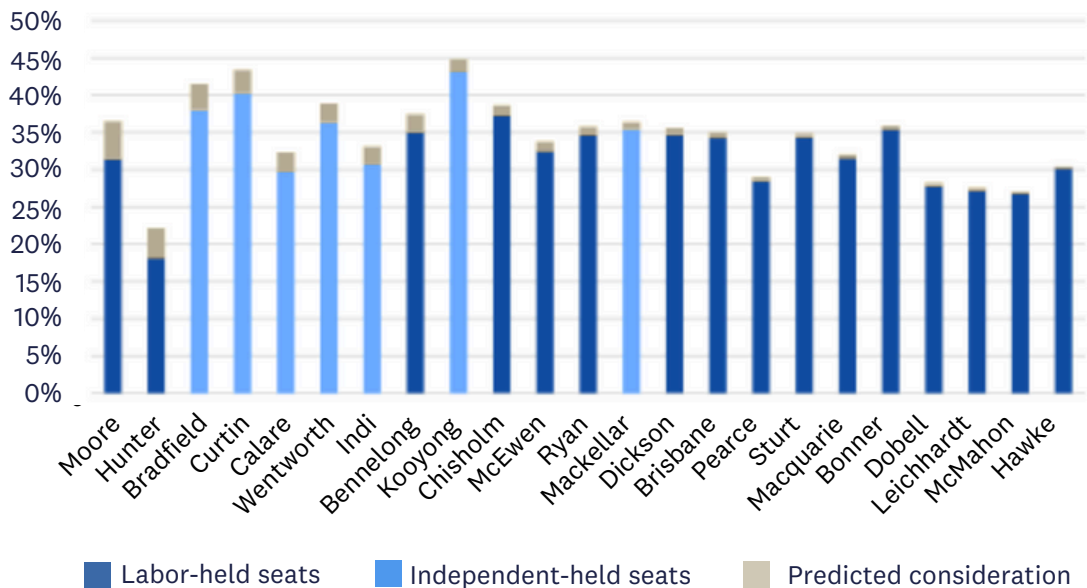
The picture is complicated further when winnable independent seats are considered against winnable Labor seats.

Although we are careful not to rely overly on specific predictions for individual seats, a clear pattern is evident. Seven of the top ten winnable seats where MRP identified consideration space for the Coalition between the 2025 primary vote and consideration are held by independents. Two of

the other three – Moore and Hunter – also featured strong third-party conservatives.

The implications are clear: on current patterns of consideration, independent seats should be much more immediate targets than their Labor-held equivalents.

Room to grow: the gap between potential and actual Coalition votes



The missing middle

Beyond the existing opportunity identified in independent seats, we considered where the Coalition might make up the deficit with Labor in the longer term. To this end, our survey also asked respondents to indicate whether they had voted for a Coalition candidate at a previous election. The results are striking.

Almost half (48%) of all former Coalition voters say they didn't vote for a Liberal or Nationals candidate at the last election. Across the electorate, this represents a pool of more than five million voters.

The most highly represented demographics in this category paint a clear picture of the type of voter that the Coalition has lost: working parents with younger children.

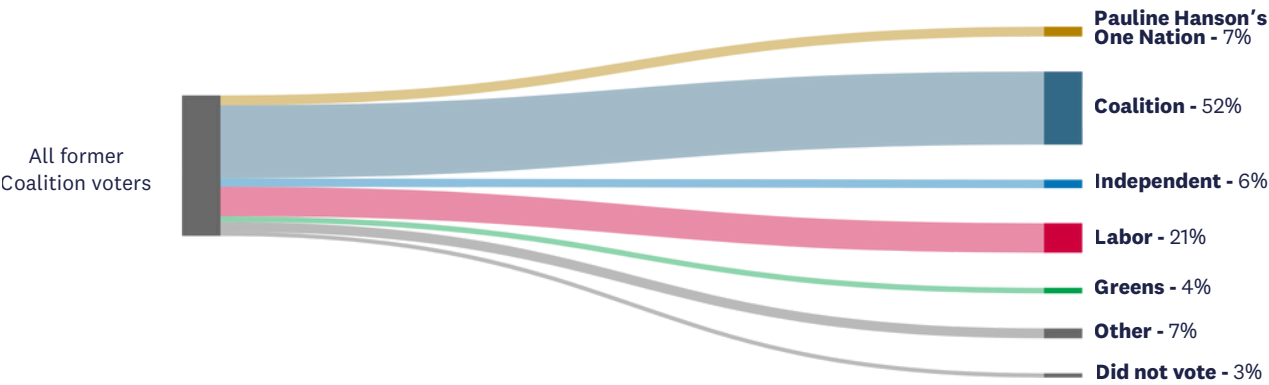
Where are ex-Coalition voters over-represented?

Characteristic	% above all voters
Parents of children <18	+7%
Full-time workers	+5%
Gen Y	+4%
Hold a mortgage	+4%
Gen X	+3%

Ex-Coalition voters are predominantly a mainstream voter group: the number who say they would vote for the Labor Party or an independent in an election held today outnumber those choosing the Greens or One Nation by a factor of two to one.

Tellingly, they also reported voting for or against the Voice referendum in similar numbers to the Australian population, indicating that these lost voters represent a persuadable middle ground.

How former Coalition voters voted in 2025

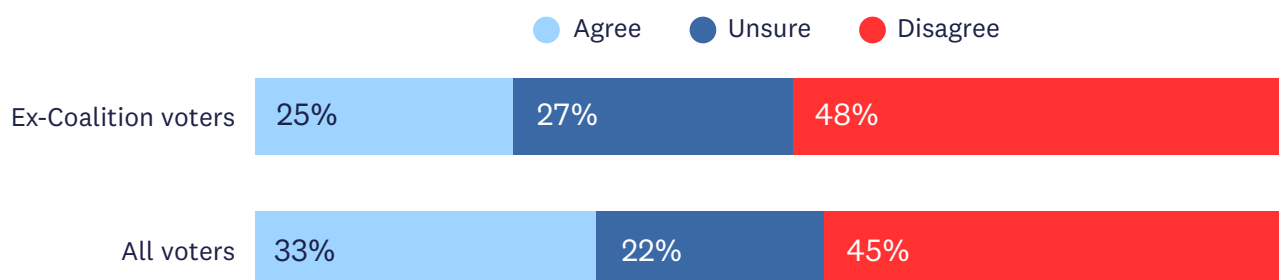


The Coalition has an alignment problem

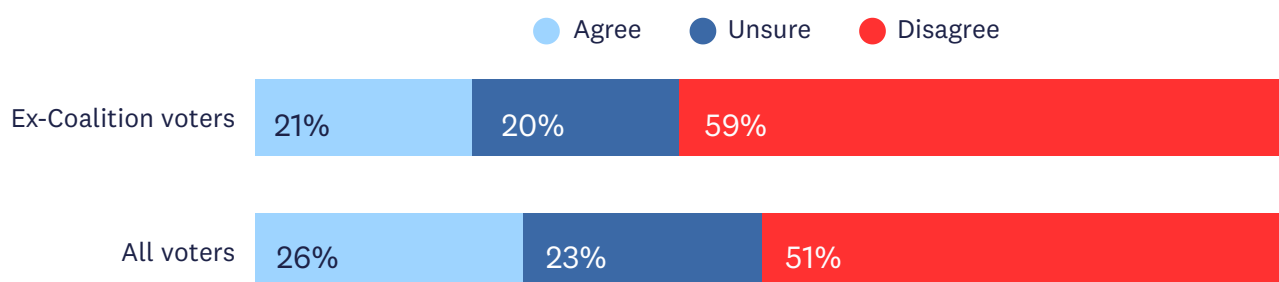
To answer the question of why these ex-Coalition voters have abandoned the Coalition, we tested their general perception of the parties' relevance to their own outlook and to modern Australia. On both counts, the Coalition fared poorly.

Despite having voted Liberal or National previously, these voters were less likely than the general population (25% vs 33%) to agree that the Coalition is aligned with their personal values and priorities. Similarly, they were less likely (21% vs 26%) to agree that the Coalition is in touch with modern Australia.

Q: The Liberal-National Coalition is aligned with my personal values and priorities.



Q: The Liberal-National Coalition is in touch with modern Australia.



Disconnect varies across policy areas

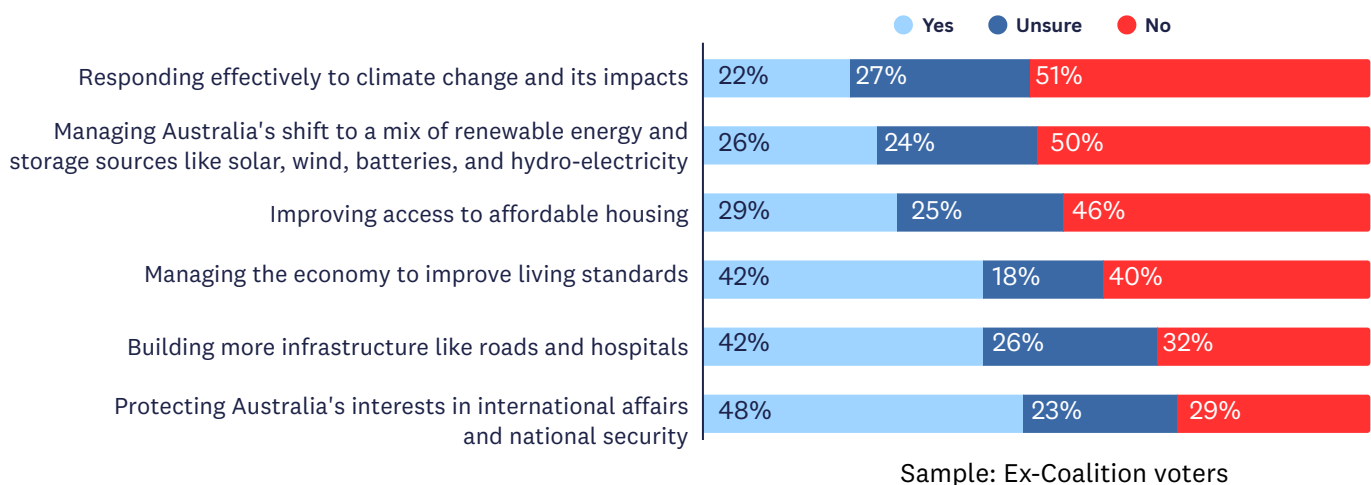
Ex-Coalition voters perceive the Coalition to be particularly out of touch with their own priorities on climate change, the shift to renewable energy, and affordable housing.

- > 51% of ex-Coalition voters say the Coalition is not aligned with their personal values and priorities on climate change;
- > 50% of voters say the Coalition is not aligned with their personal values and priorities on the shift to renewable energy;

- > 46% of ex-Coalition voters say the Coalition is not aligned with their personal values and priorities on housing affordability.

On the other hand, a plurality of these voters see the Coalition as aligned with their priorities on foreign affairs / national security and infrastructure.

Q: Do you feel that the priorities of the Liberal-National Coalition (LNP) align with your own priorities in the following policy areas?



Ex-Coalition voters take a dim view of the parties' climate policies and of efforts to water down those commitments that they have previously made.

Only 16% think the Coalition is serious about addressing climate change and its impacts (versus 19% whole-of-population, 39% for current Coalition voters).

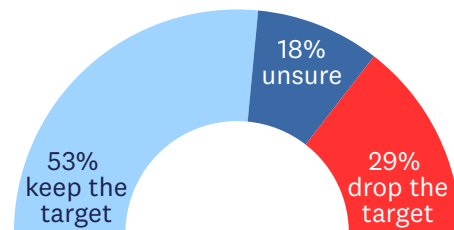
As a comparison, Labor and Green voters generally see the Coalition as unaligned with their priorities on all policy areas.

Coalition voters unsurprisingly see themselves generally aligned with their party on these issues.

A majority of ex-Coalition voters want the Coalition to keep its commitment to net-zero by 2050

- > A majority (53%) of ex-Coalition voters want The Coalition to adhere to its net zero commitments.
- > The effects of these attitudes are evident across the country: MRP predicts that in only 21 seats out of 150 would a plurality support the Coalition dropping its commitment to net zero.

Sample: Ex-Coalition voters



We can confidently conclude from this evidence that:

1. The large number of people who have previously voted for the Coalition and did not do so at the 2025 Federal Election feel a general disconnect with the Liberal and National parties, and perceive them to be out of touch with modern Australia;
2. Young working parents, who are relatively non-ideological, are probably over-represented in this 'missing middle' cohort; and
3. Their disconnect is more distinct in certain policy areas, including (but not necessarily limited to) climate change and housing.

Strategic implications

Converting consideration to primary vote in independent seats and building trust with estranged former Coalition voters calls for a wide-ranging and substantial response that is beyond the scope of this research. However, the findings do offer some pointers.

80% of ex-Coalition voters (and 71% of independent voters) agree that the Liberal and National Parties need to present a more comprehensive and credible policy platform before they would consider voting for them at the next election.

A majority of both groups also say they would only consider a party ready to govern if they have credible policies to address climate change and its impacts (Ex-Coalition voters 52% agree; net agreement +23%; Independent voters 56% agree, net agreement 36%).

This aligns neatly with the view of the general population (51% agree, net agreement +30%), and MRP predicts that a plurality of people see credible climate policy as a threshold issue in 149 of 150 Electoral Divisions. Perhaps most tellingly, 20 Electoral Divisions formerly held by the Coalition rank amongst the 71 seats where more than 50% of voters say that they will only consider a party ready to govern if they have credible policies to address climate change.

The clearest path back to majority government will require the Coalition parties to address the disconnect with the 'missing middle' by identifying and dismantling key barriers to consideration - especially climate change - through considered policy development.

©2025 Blueprint Institute



blueprintinstitute.org.au