The political landscape a year from the 2025 election

An Accent Research and RedBridge Group report



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INFLUENCE WITH INTEGRITY

The political landscape a year from the 2025 election MRP Results: February-May 2024

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About Accent Research

Combining social and political research with the tools of data science, we provide a unique survey research offering to clients from a range of sectors, including political parties, corporate clients, academics and not for profit organisations.

We are the Australian leader in using Multilevel Regression with Poststratification (MRP) for small area estimates, and have used these to provide political campaigns with granular and actionable information required to win elections.

About RedBridge Group

RedBridge is committed to influence with integrity. We enable clients to influence governments, stakeholders and public opinion to achieve outcomes that provide shared and meaningful benefits.

Our team has extensive relationships with all levels of government across the country and across the political spectrum. We specialise in research that provides insight on complex social, political and communication challenges.

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Executive summary

- Topline results indicate little movement in overall vote share since the last election. However, this hides localised movements. Labor is losing primary votes, particularly in the outer suburbs and regional centres, while the Coalition has gained small primary vote swings everywhere, except rural electorates.
- This is not necessarily resulting in major seat gains for the Coalition in the House of Representatives, though, nor major losses for the Labor Party.
- While the Coalition is within striking distance of some outer suburban and regional seats held by Labor, such as Robertson, Gilmore and Lyons, they do not appear to be winning back the seats they lost at the last election. Additionally, Labor is competitive in some Liberalheld seats, such as Menzies and Deakin in suburban Melbourne. This electoral geography makes it very difficult for the Coalition to regain government, or even look competitive.
- Using current electorate boundaries, a hung parliament or a Labor majority are almost equally likely outcomes, according to this model. If a minority government is the outcome, though, Labor is still more likely to still be the largest party in parliament. According to these results, there is almost no chance that the Coalition will win more seats than Labor at present.

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The political landscape a year from the next election

To examine the results from our model, 1,000 simulations are run from its output to predict the vote share for the Labor Party, the Coalition, the Greens and all other parties and candidates. The scenarios produced by these simulations are used to obtain a probability estimate for each outcome. Figure 1 shows the distribution of the predicted outcomes produced by these simulations, displaying the share of votes estimated for each party in the House of Representatives if an election was held during the period the survey was in the field. The more frequently a particular outcome occurs in these simulations (where the distribution in each plot is largest), the greater the estimated probability of it occurring. The top plot in this figure shows the range of estimated first preference vote shares. Underneath this, we have the range of predictions for the Labor and Coalition two-party preferred vote.

Figure 2 shows the most likely outcome for first preference vote share, as estimated by this model. According to these results, the most likely result for Labor is a first preference vote share of 32 per cent, and a twoparty preferred vote of 52 per cent. This was a primary vote swing of -1 percentage points, with no substantial change in Labor's two-party preferred vote since the 2022 election.

Estimated vote share in the House of Representatives Primary vote Coalition Greens



Figure 1: Estimated scenarios for House of Representatives vote share, by party. A higher density in the distribution showing outcomes that appeared more often from 1,000 simulations produced by the MRP models fit for this report. Undecided voters have been excluded from this analysis. Two-party preferred assumes the same preference flows as the 2022 federal election.

Conversely, the mean estimate for the Coalition first preference vote share was 36 per cent, and a two-party preferred of 48 per cent. Essentially no change from the last election.

For the Greens, the estimated first preference vote share was 13 per cent; a swing of 1 percentage points. While for all other parties and candidates, the mean estimated first preference vote was holding steady at 19 per cent.



Figure 2: Estimated national and state first preference vote shares for a federal House of Representatives election.

Primary vote share by state

The geography of the political landscape

Australian elections are not necessarily won by the party, or parties, that win a majority of the popular vote. Rather, it is who can command a majority of support in the House of Representatives that form government. Each seat represents an individual electoral division: discrete spatial units which cover all of the geographical territory of Australia, without overlap or exclusion, with each having an average of nearly 120,000 electors enrolled to vote.

Therefore, estimates of vote share at a more granular level — and the electorate level in particular — can provide insights into the potential electoral ramifications of polling results. Using MRP, we can provide this. We start by examining results at the regional level, and then drill down from there.

Figure 3 shows these regional breakdowns, with results from the 2022 election and the estimates calculated from the MRP shown for electorates in: inner and middle suburbs, outer suburbs, provincial cities and rural communities. More granular first preference breakouts are plotted in the maps shown in figures 4 to 7, with detailed results for each electoral division provided in the Appendix. Figure 8 shows swings by party and region.

Primary vote share by metropolitan and regional electorates Coalition Labor Greens Other parties and candidates National Inner and middle suburbs Outer suburbs **Provincial cities** Rural communities

Figure 3: Estimated first preference vote shares for a federal House of Representatives election in metropolitan and regional areas. Electorates are allocated using AEC defined regions.

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Figure 4: Estimated Coalition vote share, by electoral division.



Figure 5: Estimated Labor vote share, by electoral division.



Figure 6: Estimated Greens vote share, by electoral division.



Figure 7: Estimated vote share of other parties and candidates in each electoral division.

ferent parts of the country. Figure 8 shows the average (mean) estimated plore the electoral ramifications of these results in detail. first preference and two candidate preferred swings across electorates in inner and middle suburbs, outer suburbs, provincial cities and rural communities. This is the mean change for each party or group of parties across these four different groups of division, and not the aggregate swing in these regions. That is, we did not sum the votes of the parties in inner metro areas together, and then calculate the change in support since 2022. Rather, we averaged across the change in electorates for each party. This was mainly done as there are varying levels of party and independent candidate competition across different types of electorates. In particular, this takes into account that independents and Greens were only in the two candidate preferred in a few seats in each type of electorate.

According to these results, the Coalition has on average experienced small positive primary vote swings across inner and outer metropolitan areas, and a two percentage point decline in support in rural electorates. Conversely, the Labor Party has generally held steady in rural areas, but has seen its support decline in metropolitan areas; particularly in the outer suburbs.

As noted above, federal elections in Australia are not decided by the absolute total number of votes won by each party. Rather, it is who has majority support in the House of Representatives that forms government. These regional variations in swings mean that the electoral outcomes are not always what the topline vote shares would suggest. In the next sec-

These patterns resulted in significant variations in outcomes across dif- tion we take advantage of the granular results provided by MRP to ex-

Mean swings across metropolitan and regional electorates



First preference

Figure 8: Average estimated electorate-level swings for first preference and two-candidate preferred vote in metropolitan and regional areas. Here, the average swing is the mean division-level swing for each party across each area. Electorates are allocated using AEC defined regions. Figures are only shown for changes over one percentage point, and are rounded to the nearest percent.

The political implications of these results

The results from MRP can be used to estimate the number of seats each party would win according to these data. Figure 9 shows the distribution of possible House of Representatives outcomes for each party predicted by this model from 1,000 simulations run over its output, with the higher density of the shaded area indicating outcomes that appeared more often in these simulations. **It should be noted that the seat totals listed in this plot allocate all divisions, including some electorates that are too close to call**. The breakdown of seats won, with these close electorates removed, is shown in figure 10 and discussed below. Table 1 below shows the seats predicted to change hands or to be too close to call.

Although Labor is almost certain to win the most seats according to these results, it is an almost equal probability that Labor will either win majority government, or be the largest party in a minority government.

The predicted range of seats won by the Labor Party, the Coalition parties, The Greens and all other parties and candidates are shown in figure 9, while figure 10 shows the most likely number of electorates each party (or groups of parties and candidates) is predicted to gain or retain based on these results.

The likely range of seats won by Labor if an election were held during the fieldwork period is estimated to have a low end of 71 and an upper range of 83. For the Coalition, the estimated range of seats they would win if an election were held during the fieldwork period is between 53







and 64; with it being unlikely the Coalition would emerge as the largest party in parliament.

For the Greens, the estimated low end for seats won is 2 and an upper range of 5. For all other parties and candidates, the range of seats won is estimated to be between 8 and 14.



Predicted seats retained and gained

Figure 10: Estimated most likely number of seats gained, lost or retained by each party. Predicted seat outcomes were obtained from first preference votes calculated using MRP, with preference flows assumed to be the consistent with the 2022 federal election. These figures treat electorates that changed hands at by-elections since the 2022 federal election as though they are still held by the party that won them at that election.

	Fir	st prefere	ence share		Two	-candidat	te preferre	d
Division	Coalition	Labor	Greens	Other	Coalition	Labor	Greens	Other
Changing har	nds							
Cowper	37	18	9	36	48			52
Fowler	19	36	13	32		54		46
Menzies	40	33	16	12	49	51		
Too close to d	all							
Aston	41	33	13	12	50	50		
Brisbane	41	29	22	8	50		50	
Curtin	40	16	10	34	50			50
Deakin	42	33	14	11	50	50		
Gilmore	40	33	11	16	50	50		
Lingiari	33	30	8	29	50	50		
Lyons	37	28	13	23	50	50		
Moore	41	32	14	13	51	49		
Robertson	43	35	10	12	50	50		

Table 1: Seats predicted to be changing hands, or too close to call

Appendix 1: Detailed results

	Fi	rst prefere	ence share		Two	Two-candidate preferred			
Division	Coalition	Labor	Greens	Other	Coalition	Labor	Greens	Other	
ACT									
Bean	30	41	17	12	37	63			Labor retain
Fenner	29	45	19	7	34	66			Labor retain
Canberra	23	44	26	7		62	38		Labor retair
NSW									
New England	49	18	7	26	68	32			Coalition retain
Parkes	45	21	6	29	67	33			Coalition retain
Farrer	48	21	8	23	67	33			Coalition retain
Riverina	41	21	7	31	64	36			Coalition retain
Cook	54	25	10	12	63	37			Coalition retair
Berowra	51	23	13	14	63	37			Coalition retain
Page	44	21	9	25	62	38			Coalition retair
Lyne	42	22	9	26	62	38			Coalition retain
Hume	43	21	7	29	61	39			Coalition retain
Bradfield	51	22	11	15	61			39	Coalition retain
Mitchell	51	26	12	11	60	40			Coalition retain
Hughes	44	25	11	20	58	42			Coalition retair
Lindsay	47	29	9	15	57	43			Coalition retain
Calare	46	18	8	28	57			43	Coalition retain
Banks	48	33	9	10	56	44			Coalition retain
Robertson	43	35	10	12	50	50			Too close to cal
Gilmore	40	33	11	16	50	50			Too close to cal
Bennelong	42	37	12	9	49	51			Labor retair
Wentworth	41	13	9	37	49			51	Other retain
Cowper	37	18	9	36	48			52	Other gair
Paterson	38	35	10	17	48	52			Labor retair

Table 2: Detailed electorate results

	Fi	rst prefere	ence share		Two	o-candida	te preferred	ł	
Division	Coalition	Labor	Greens	Other	Coalition	Labor	Greens	Other	
Mackellar	36	11	7	46	45			55	Other retain
North Sydney	34	22	8	35	45			55	Other retain
Reid	38	40	10	12	45	55			Labor retain
Werriwa	33	38	9	20	44	56			Labor retain
Dobell	35	39	11	15	44	56			Labor retain
Shortland	34	38	11	16	43	57			Labor retain
Parramatta	34	40	11	16	43	57			Labor retain
Macquarie	35	39	12	14	43	57			Labor retain
Eden-Monaro	34	38	11	17	42	58			Labor retain
Macarthur	33	42	10	15	42	58			Labor retain
Greenway	36	44	10	11	42	58			Labor retain
Hunter	28	36	12	25	42	58			Labor retain
McMahon	32	44	8	17	40	60			Labor retain
Chifley	32	46	8	13	39	61			Labor retain
Whitlam	29	41	13	16	38	62			Labor retain
Richmond	21	30	22	27	38	62			Labor retain
Kingsford Smith	32	44	16	8	37	63			Labor retain
Warringah	28	12	10	50	37			63	Other retain
Blaxland	29	46	9	16	37	63			Labor retain
Watson	29	46	12	13	36	64			Labor retain
Barton	29	47	14	10	35	65			Labor retain
Cunningham	26	40	22	13	34	66			Labor retain
Newcastle	27	42	19	11	33	67			Labor retain
Sydney	23	48	23	6		66	34		Labor retain
Grayndler	20	50	22	8		67	33		Labor retain
Fowler	19	36	13	32		54		46	Labor gain

 Table 2: Detailed electorate results (continued)

	Fi	rst prefere	ence share		Two	o-candida	te preferred	k	
Division	Coalition	Labor	Greens	Other	Coalition	Labor	Greens	Other	
NT									
Lingiari	33	30	8	29	50	50			Too close to call
Solomon	28	38	14	19	39	61			Labor retain
QLD									
Maranoa	52	15	6	27	74	26			Coalition retain
Herbert	48	23	8	21	63	37			Coalition retain
Wide Bay	46	21	9	24	63	37			Coalition retain
Fairfax	48	22	11	20	62	38			Coalition retain
Moncrieff	43	22	10	25	62	38			Coalition retain
Wright	41	21	12	27	61	39			Coalition retain
Fadden	43	24	10	23	60	40			Coalition retain
Hinkler	42	24	9	25	60	40			Coalition retain
Dawson	41	24	8	27	59	41			Coalition retain
McPherson	42	24	12	21	59	41			Coalition retain
Fisher	44	24	13	18	58	42			Coalition retain
Capricornia	42	26	8	24	58	42			Coalition retain
Leichhardt	40	26	9	25	56	44			Coalition retain
Bowman	43	27	14	16	56	44			Coalition retain
Petrie	44	29	12	16	56	44			Coalition retain
Groom	45	20	7	28	55			45	Coalition retain
Forde	38	28	11	23	53	47			Coalition retain
Longman	39	29	9	22	53	47			Coalition retain
Dickson	42	30	13	15	52	48			Coalition retain
Bonner	43	30	16	12	52	48			Coalition retain
Flynn	36	30	9	25	52	48			Coalition retain
Brisbane	41	29	22	8	50		50		Too close to call

Table 2: Detailed electorate results (continued)

	F	irst prefere	ence share		Two	o-candida	te preferred	b	
Divisior	Coalition	Labor	Greens	Other	Coalition	Labor	Greens	Other	
Ryar	ı 37	26	26	11	47		53		Greens retain
Rankir	ı 33	39	12	17	43	57			Labor retain
Blai	· 29	34	15	23	43	57			Labor retain
Griffith	n 30	30	29	12	41		59		Greens retain
Lilley	y 32	38	20	11	39	61			Labor retain
Oxley	, 31	41	16	12	39	61			Labor retain
Moretor	n 28	36	21	15	38	62			Labor retain
Kennedy	y 20	19	11	49	34			66	Other retain
SA									
Barke	r 49	20	8	23	62	38			Coalition retain
Grey	y 42	22	8	29	62	38			Coalition retain
Stur	t 46	31	13	10	53	47			Coalition retain
Boothby	, 38	34	16	13	47	53			Labor retain
Mayo	29	23	17	31	40			60	Other retain
Hindmarsh	ı 32	41	14	13	40	60			Labor retain
Makir	n 32	43	13	12	39	61			Labor retain
Adelaide	e 32	38	20	11	39	61			Labor retain
Spence	e 28	39	15	19	38	62			Labor retain
Kingstor	ı 29	43	16	12	35	65			Labor retain
TAS									
Praddar	40	24	0	27	57	13			Coolition rotain
Braddor	40	24	7	27	57	43			
Dass	5 40 . 27	∠0 20	12	20	52	40 50			
Erophir	5 37 5 77	20 20	10	23 17	3E 20	50			
Clark	і Z/	20	17 21	17	55	30		61	

	Fi	rst prefere	ence share		Two	-candida	te preferred	k k	
Division	Coalition	Labor	Greens	Other	Coalition	Labor	Greens	Other	
Mallee	43	19	7	32	67	33			Coalition retain
Gippsland	44	19	9	28	67	33			Coalition retain
Flinders	41	24	10	25	58	42			Coalition retain
La Trobe	43	26	11	19	57	43			Coalition retain
Casey	38	26	14	22	53	47			Coalition retain
Wannon	43	21	9	27	52			48	Coalition retain
Monash	34	26	12	28	52	48			Coalition retain
Nicholls	46	15	5	35	52			48	Coalition retain
Aston	41	33	13	12	50	50			Too close to call
Deakin	42	33	14	11	50	50			Too close to call
Higgins	42	30	20	8	49	51			Labor retain
Menzies	40	33	16	12	49	51			Labor gain
Kooyong	39	10	7	43	48			52	Other retain
Goldstein	38	14	9	38	47			53	Other retain
Chisholm	37	39	14	10	44	56			Labor retain
Bruce	33	37	14	16	43	57			Labor retain
McEwen	33	36	16	15	43	57			Labor retain
Dunkley	34	37	13	16	43	57			Labor retain
Corangamite	35	36	16	13	43	57			Labor retain
lsaacs	34	38	15	12	42	58			Labor retain
Hawke	29	37	11	23	41	59			Labor retain
Macnamara	34	33	24	9	41	59			Labor retain
Holt	30	39	13	18	41	59			Labor retain
Gellibrand	31	39	17	12	40	60			Labor retain
Calwell	30	40	12	17	39	61			Labor retain
Gorton	30	42	11	17	39	61			Labor retain
Jagajaga	33	39	18	10	39	61			Labor retain

 Table 2: Detailed electorate results (continued)

	Fi	rst prefere	ence share		Two	o-candidat			
Division	Coalition	Labor	Greens	Other	Coalition	Labor	Greens	Other	
Ballarat	31	41	16	13	38	62			Labor retain
Indi	33	14	7	46	38			62	Other retain
Corio	29	40	17	14	37	63			Labor retain
Bendigo	29	39	18	15	37	63			Labor retain
Lalor	26	42	13	19	36	64			Labor retain
Scullin	27	42	14	17	35	65			Labor retain
Fraser	26	39	19	16	35	65			Labor retain
Maribyrnong	28	44	17	11	34	66			Labor retain
Hotham	26	42	17	14	34	66			Labor retain
Wills	21	40	27	12		62	38		Labor retain
Melbourne	17	30	44	9		45	55		Greens retain
Cooper	20	41	28	11		61	39		Labor retain
WA									
O'Connor	39	24	10	28	58	42			Coalition retain
Forrest	42	26	13	18	55	45			Coalition retain
Canning	43	30	8	19	55	45			Coalition retain
Durack	41	25	9	25	53	47			Coalition retain
Moore	41	32	14	13	51	49			Too close to call
Curtin	40	16	10	34	50			50	Too close to call
Tangney	39	38	12	10	46	54			Labor retain
Hasluck	34	37	12	16	44	56			Labor retain
Swan	35	38	15	12	43	57			Labor retain
Pearce	31	39	13	17	41	59			Labor retain
Cowan	30	43	10	16	39	61			Labor retain
Perth	29	38	20	12	37	63			Labor retain
Burt	28	45	12	14	36	64			Labor retain

Table 2: Detailed electorate results (continued)

	ł	te preferrec	-candidat	Two					
	Other	Greens	Labor	Coalition	Other	Greens	Labor	Coalition	Division
Labor reta			66	34	14	18	42	27	Fremantle
Labor reta			66	34	15	13	45	26	Brand

Table 2: Detailed electorate results (continued)

Appendix 2: Methodology and assumptions

Assumptions

The results in this report rely on several assumptions. These are:

- 1. That the electorate will look, demographically, as it did at the time of the 2021 Census (although we do update this where possible using the electoral roll).
- 2. That incumbent independents and those who did well at the last Vote intention was located immediately after demographic items and election would run again if an election were held now.
- 3. That preference flows to the Labor Party coming from other minor parties will mirror the 2022 election results at the level of individual divisions.
- 4. Respondents who answered 'do not know' when asked how they would vote if an election were held at the time the survey was collected are treated as equivalent to non-voters.

None of these assumptions are necessarily wrong, but are rather approximations of reality, and will not be entirely correct in every instance.

Survey fieldwork

The fieldwork for this survey was conducted between February and May, 2024. The sample of N = 4,040 Australian citizens aged 18 and older, who were enrolled to vote was recruited over online panel to fill quotas based on age, gender, location and education, with a loose quota also included for vote at the 2022 federal election.

other questions used for screening and quotas. Undecided respondents were asked a leaner question.

Those who refused to or were unable to provide a vote intention in both the initial question and leaner made up 9 per cent of the sample. These electors were included in the MRP model, but excluded from subsequent analysis and the published vote intention figures.

Vote intention question wording

Question text

If a federal election for the House of Representatives were held **today**, which of the following would you give your first preference vote to?

- 1. Labor Party
- 2. Liberal Party shown in electorates where Liberals ran a candidate in 2022
- 3. National Party shown in electorates where Nationals ran a candidate in 2022
- 4. Liberal-National Party shown in Queensland
- 5. Country Liberal Party shown in the Northern Territory
- 6. The Greens
- 7. Other parties and candidates relevant options shown in electorates where they ran in 2022
- 8. Will note vote
- 9. Undecided

If answered 'Undecided' above

If you had to pick, which of these are you leaning towards?

- 1. Labor Party
- 2. Liberal Party shown in electorates where Liberals ran a candidate in 2022
- 3. National Party shown in electorates where Nationals ran a candidate in 2022
- 4. Liberal-National Party shown in Queensland
- 5. Country Liberal Party shown in the Northern Territory
- 6. The Greens
- 7. Other parties and candidates relevant options shown in electorates where they ran in 2022
- 8. Will note vote
- 9. Undecided

The methodology of MRP

The primary method used to produce the estimates for this report was a model-assisted approach called multilevel regression with poststratification (MRP).

This model was fit to a nationally representative sample of 4,040 Australian voters from survey data collected by Accent Research and Red-Bridge over online panels.

This methodology combines both individual-level information from survey respondents, and division-level information (such as the Labor vote share at the previous election, or weighted population density of each division), which helps improve the fit of these models and to obtain reasonable division-level inferences.

These data are high quality. They match the age, gender, geographic and educational characteristics of the Australian electorate closely. However, while the sample is high quality, they are less well placed for division-level estimates in their raw form, with a median sample size of 26 respondents per division. This is not enough data to conduct small area estimates down to the division level using descriptive statistics. Rather, it requires a model-assisted procedure. We use Multilevel Regression with Post-stratification (MRP).

This is a two-step process. First models are fit to the survey data predicting the outcome in which we are interested. This can be vote intention or membership of a population segment. We then post-stratify these predictions on a frame created with Census data, allowing us to make a prediction for population sub-groups, including small area estimates for residents of different electoral divisions.

Variable selection

Two types of variables are used for MRP: individual- and division-level predictors.

Individual level predictors are characteristics of individual voters, which are obtained from respondents through surveys, but also have matching data from the Census for post-stratification.

Individual-level predictors are selected for two main reasons. First, the variables selected includes those that require weighting (such as by education and religion). Those that have predictive value (such as home ownership) are also used.

In addition, aggregate population-level information about the electorates in which voters live is also included in the model. This includes prior election results. It also includes socio-economic predictors, such as median household income, and population density and diversity. These division-level socio-economic predictors tend to be highly correlated, so are reduced down to two dimensions using factor analysis.

Fitting the model

Using these data, we fit a multinomial multilevel logistic regression models for vote intention Y as a function of predictors X (our individual and division level variables).

Vote intention Y is measured as one of six outcomes k: support for the Labor Party, Liberal-National Coalition parties, the Greens, Other parties and candidates, and those who will not vote or are undecided.

This treats the probability of a particular choice for any type of individual respondent as a function of the demographic and geographic characteristics that define them. For example, each of the demographic characteristics of respondents included in the model is allocated its own cell c for voters' age, gender, education, religion, whether they own their home and the electoral division in which they live (and its various characteristics).

Post-stratification

To weight the predictions from these models, a set of cells are extracted from the Census using the Australian Bureau of Statistics' (ABS) Table-Builder website to create a post-stratification frame, enabling the crossclassification of X by division. This consists of 28,992 cells, with an individual cell for each cross-classification of age (3) x gender (2) x education (4) x religion (4) x home ownership (2) x division (151). The estimate for each cell is weighted by the number of Australian citizens found matching those demographic characteristics in the actual population. Additional demographics would mean additional cells. This potentially produces more noise in the estimates, but also provides greater predictive power and additional characteristics on which we can weight these data. Non-Census variables may also be imputed onto the post-stratification frame. We do this with 2022 House of Representatives vote.

The frame from this process is then used to post-stratify vote intention. These cells are treated as a data set with which to predict Y, using the model derived from the survey data. For a multinomial outcome y, such as an elector's first preference vote, θ_c , we predict the probability that elector i in the corresponding Census cell c has attribute Y = k.

Each cell is assigned the relevant population frequency N_c , calculated by multiplying the probability of Y for each cell with the population count from the Census. Summing over cells and dividing by the total cell count gives us an estimate for the proportion of citizens within a division with attribute Y = k. Accordingly we can measure electors' vote intention in all 151 electoral divisions represented in the Australian parliament at the 2022 federal election.

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