



SENTIMENT & POLLING SYNTHESIS

Australia's fragmenting vote

One Nation now tops the primary vote in poll after poll, while both major parties shed support. But the headline hides the real story, and every side has genuine strengths. A read across the national and state numbers.

Sources: **Roy Morgan, Newspoll, RedBridge** National + VIC, QLD, SA **MarvelX Research**

READ THIS FIRST

This synthesises public polling from several firms using different methods, plus one actual election result. Polls are snapshots, not forecasts; pollsters differ; and figures are as reported in early-to-mid 2026. Treated together they show a direction, not a destiny.

THE STORY IN BRIEF

A collapse of the middle, not just a rise on the right

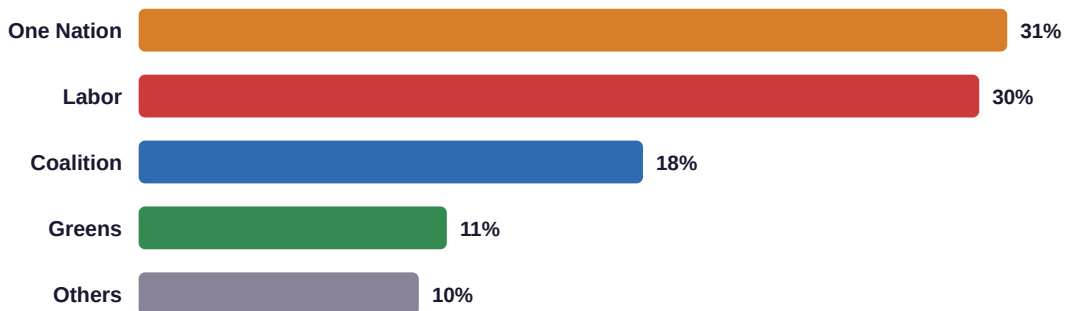
The eye-catching line is that One Nation has overtaken Labor. The more important one is that Australia's two traditional major parties are bleeding support at the same time, and the preferential voting system is quietly rewriting what that surge actually means.

Across recent national and state polling, One Nation sits in the high 20s to low 30s on the primary vote, often first. Yet because of how preferences flow, leading the primary count is not the same as being on track to govern. This report lays out the numbers side by side, shows where the support is concentrated, and sets out the real strengths of One Nation and of each of its opponents.

One Nation in front, the Coalition adrift

The most recent national Newspoll has One Nation at a record high, narrowly ahead of Labor, with the Coalition sunk to a distant third. Other national polls from the same window, including RedBridge and Roy Morgan, tell the same broad story: One Nation and Labor near level at the top, the Coalition well back.

FIGURE 1 · NATIONAL PRIMARY VOTE (NEWSPOLL, JUNE 2026)

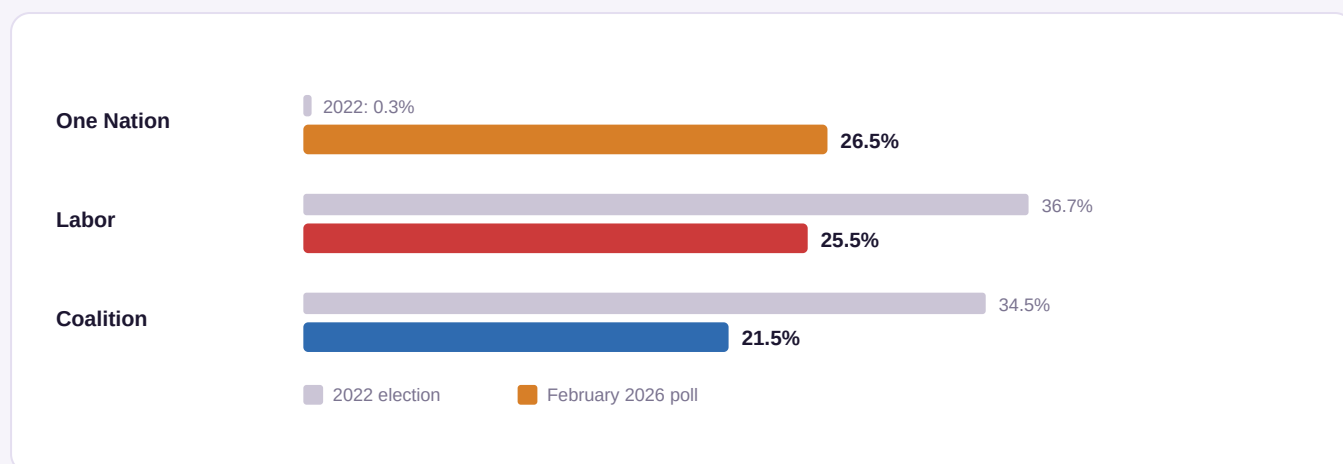


Since the May budget, One Nation rose about seven points to a record Newspoll high, Labor slipped to its weakest in over a decade, and the Coalition fell further. RedBridge and Roy Morgan national polls in the same period also placed One Nation first or level with Labor.

From nothing to first in one term

The clearest picture of the collapse comes from Roy Morgan's February Victorian state poll. One Nation has gone from a rounding error at the 2022 election to the top of the primary vote, while Labor and the Coalition have each shed enormous ground.

FIGURE 2 · VICTORIAN PRIMARY VOTE: 2022 ELECTION VS FEBRUARY 2026



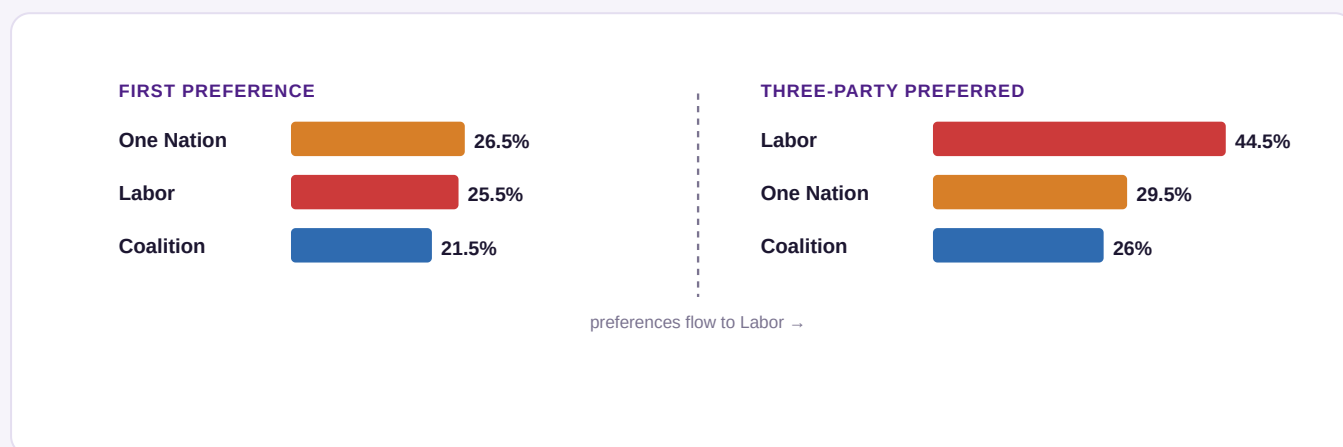
Between them, the two traditional majors lost roughly 24 points of primary vote since 2022. Independents also rose, from 5.6% to 9%. Note that other Victorian polls (DemosAU, Freshwater) have had Labor running third behind One Nation rather than second, so the exact order is contested, but the direction is not.

THE TWIST THAT MATTERS

First on primaries, behind after preferences

This is the part the headline skips, and the single most important thing in the data. Australia votes preferentially, so where minor-party and independent votes flow decides the result. When Roy Morgan distributes those preferences, the order flips: Labor moves clear of the field, and One Nation falls to second.

FIGURE 3 · VICTORIA: THE ORDER FLIPS AFTER PREFERENCES



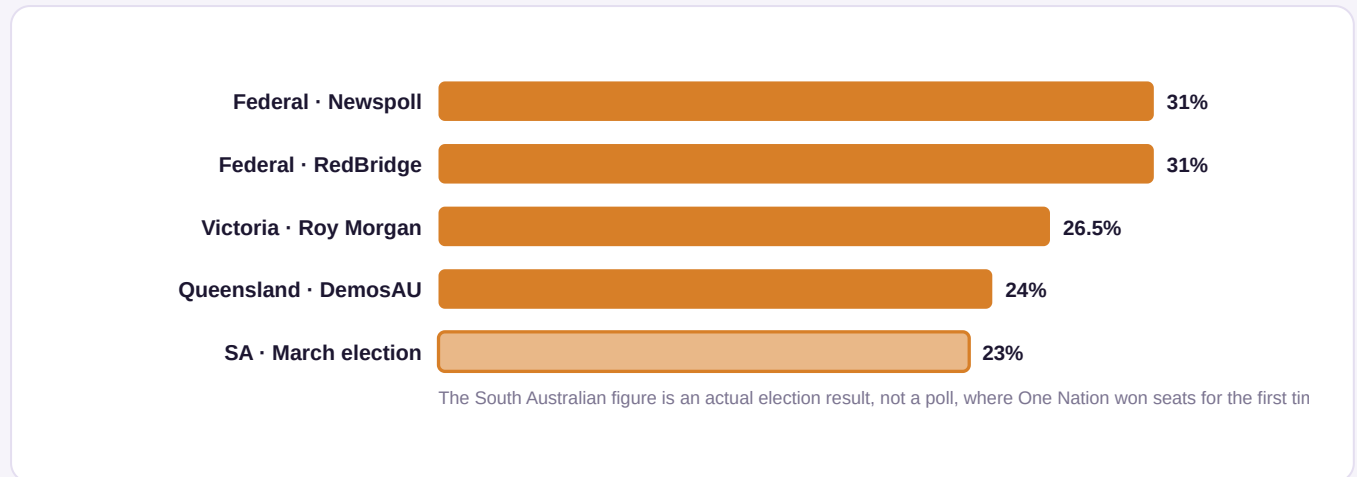
In an ALP-versus-One Nation count, Greens voters split to Labor 91%, independents 68% and other minor parties 62.5%. So Labor still leads two-party-preferred (52.5 to 47.5), and the Coalition would beat One Nation 56 to 44. Roy Morgan's read is a likely hung parliament. The lesson: a primary-vote lead and a path to government are not the same thing.

A NATIONAL PATTERN

Consistent, and confirmed at a real ballot box

One Nation's number is not a single-poll spike. It shows up at a similar level across firms and states, and crucially it has already been validated at an actual election, not just in polling.

FIGURE 4 · ONE NATION PRIMARY VOTE, RECENT POLLS AND RESULTS



From the low 20s to the low 30s nationwide. The South Australian result in March, more than 20% and several seats won, is the strongest evidence that the polling reflects something real rather than a passing mood.

— WHO IS BEHIND IT

Country, and men, more than the rest

The Victorian numbers show where One Nation's support concentrates. It runs far stronger outside the capital and skews male, the familiar shape of populist-right support.

ONE NATION BY REGION (VIC)		ONE NATION BY GENDER (VIC)	
Country Victoria	34.5%	Men	30.5%
Melbourne	24%	Women	22%

Leadership tells a parallel story. Premier Jacinta Allan is deeply unpopular, with 67.5% disapproving and only 30.5% approving, and she trails Opposition Leader Jess Wilson as preferred premier, 42.5 to 51. Yet Labor still leads two-party-preferred. It is a "pox on both houses" mood: voters are furious with the incumbent, but the Coalition is not capitalising and One Nation cannot win on preferences, so Labor holds on by default.

— AN EVEN-HANDED READ

The real strengths of every side

Good analysis resists barracking. Each of these parties holds a genuine advantage, and understanding all four is how you read where this actually goes.

ONE NATION

- **Reads the room.** Names cost of living, housing and migration in plain terms the majors were slow to use.
- **Momentum is real.** Turned polling into actual seats in South Australia and a first lower-house seat at the Farrer by-election.
- **Crosses old lines.** Pulling disaffected voters from both Labor and the Coalition, especially in the regions.

LABOR

- **Structurally ahead.** Still wins two-party-preferred despite a low primary, because Greens and independent preferences flow heavily its way.
- **A fresh mandate.** Returned federally in 2025 with a large majority.
- **Able to govern.** Can pass major reform without relying on the crossbench.

COALITION

- **The established alternative.** Beats One Nation comfortably after preferences (56 to 44 in Victoria) and leads outright in Queensland.
- **A leadership asset.** In Victoria, Jess Wilson is preferred premier with net-positive approval.
- **Best-placed for change.** The natural beneficiary if voters move to remove an unpopular Labor government.

GREENS

- **The most engaged base.** Highest social-media engagement and the youngest support.
- **Growing and urban.** Up since 2022 and strong in inner Melbourne (15%).
- **Kingmakers.** Their preferences are decisive and would shape any hung parliament.

WHAT IT MEANS

Read it as a direction, with care

Put together, the polls describe a genuine realignment: a populist surge feeding on real cost-of-living, housing and migration grievances, and a hollowing-out of the major-party middle. But three cautions keep it honest. The primary lead does not translate into seats under preferential voting. Some of One Nation's support is likely "parked" protest from disaffected major-party voters that may return when those parties respond. And these are snapshots from different pollsters using different methods, with Victoria still nine months from its election, so volatility is high.

FOR MARVELX'S LOCAL WORK

One Nation's strength in country and outer areas (34.5% in country Victoria) matters for a growth-corridor seat like Melton, where it could poll well even in Labor territory. And this whole report is a live argument for why the Melton survey asks both first preference and preference flow: the primary number and the preferred number tell opposite stories, and only measuring both captures the truth.



MarvelX Research

Sources

Roy Morgan Victorian State Voting Intention (SMS survey, 13–16 February 2026, n=2,462); national Newspoll (1–4 June 2026) as reported by The Conversation; AFR / RedBridge / Accent Research and Roy Morgan national polling (late May to early June 2026); Queensland state DemosAU / Premier National poll (May–June 2026); 2026 South Australian state election result; and Victorian state polling from DemosAU and Freshwater Strategy via The Poll Bludger. Polls use different methods and samples; figures are as reported at the time of writing and should be refreshed before publication.