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Demographic structure and voting behaviour during democratization: evidence from Malaysia's 2022 election

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DEMOGRAPHIC STRUCTURE AND VOTING BEHAVIOR DURING DEMOCRATIZATION: EVIDENCE FROM MALAYSIA'S 2022 ELECTION

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Malaysia's fifteenth general election (GE15) was a milestone in the country's democratization process, with new parties and political movements competing with established political coalitions. In this paper, we investigate how Malaysia's cleavage structure—a central feature of Malaysia's prior authoritarian regime—shapes electoral competition in a newly competitive political environment. We find that the "race paradigm" (Milner, Embong, and Tham 2014) remains central to explaining party strategy and coalition behavior in GE15, but that more democratic competition has increased the salience of regional differences—both between peninsular Malaysia and East Malaysia, and within peninsular Malaysia itself. Our analysis reveals the structural foundations of political competition in democratizing countries and contributes to the emerging literature on authoritarian legacies in such contexts.

Introduction

Malaysia's 15th general election took place on November 19, 2022, capping a period of unprecedented change in Malaysian politics. The election came less than five years after the "political tsunami" of 2018: that year, an unlikely coalition of opposition parties defeated the long-running BN government in a national election, effecting the first change of government in the country's history. The relatively progressive coalition that prevailed in 2018, the Alliance of Hope (PH), ruled for 18 months before its government collapsed. Subsequently, two subsequent prime ministers held together fragile ruling coalitions, coinciding with the COVID-19 pandemic during which democratic rule was suspended for a period of six months. These challenges notwithstanding, political instability helped usher in a significantly more competitive political context in which incumbent advantages have proved ineffective in maintaining party or coalition dominance.

Malaysia's 2022 election took place in the context of this more dynamic and uncertain political environment. The previously cohesive and stable coalitions that had competed for power

in Malaysia have significantly fragmented, as personnel and parties shifted allegiances and new coalitions and parties emerged. In the runup to the 2022 election, for the first time, no single coalition was predicted to prevail. Indeed, the election led to a hung parliament for the first time in Malaysia's history, leading to an unprecedented period of post-electoral negotiation prior to the formation of a new governing coalition under the leadership of Prime Minister Anwar Ibrahim.

How has this newly competitive environment affected Malaysia's political cleavages? Malaysia is perhaps best known in the comparative politics literature for its enduring forms of ethnic politics that for decades have been reified through its party system. Alongside institutional advantages, "divide and rule" policies along racial, religious, and regional lines were key to the persistence of authoritarian rule in Malaysia under successive administrations, explain the durability of the BN's rule from 1971 to 2018. This manuscript examines how these central cleavages in Malaysia's political competition are changing in this newly competitive political environment.

Recent literature has examined how authoritarian legacies continue to shape electoral and political dynamics after democratization. Formal institutions created under authoritarian conditions continue to shape political competition and a wide range of policymaking outcomes in democracy (Simpser, Slater, and Wittenberg 2018). Given their organizational resources, political branding, and experience, former authoritarian ruling parties tend to perform well in democratic elections (Loxton and Mainwaring 2018; Miller 2021). At the level of voters, legacies of state building and political socialization under authoritarianism have lasting effects on partisan preferences and voting behavior (Berman and Nugent 2020; Frantzeskakis and Sato 2020; Neundorf and Pop-Eleches 2020). However, although ethnoreligious cleavages have been identified as important elements to the process of democratization itself, and sometimes key to post-democratic politics (Capoccia and Ziblatt 2010, 947), it is less clear how party and coalition fragmentation, and more competitive politics, affects the salience of cleavages in the context of democratization.

Using newly available data on the socioeconomic characteristics of Malaysia's parliamentary constituencies, we examine voting patterns in Malaysia's diverse regional environments in the 2022 election. We find that despite a proliferation of new candidates and parties, the emergence of new coalitions, and a vastly expanded electorate swelled with first-time voters, ethnic structure remains a significant predictor of voter choice. However, we also identify

an increasing salience of regional differences: although regional factors have always be central to Malaysian politics, they have become even more salient in this newly competitive political environment. We explain these findings by emphasizing both the persistence of party branding, the use of racial heuristics by voters, and the choices made by party leaders and other elites to emphasize ethno-regional and religious identities in campaign messaging and candidate choice. Our analysis provides new insights into how cleavage structures change and persist as a result of elite and voter behavior.

In the next section, we discuss authoritarian legacies in the context of democratization, describing how social cleavages and geographic factors that shape strategies of authoritarian rule can persist during periods of political liberalization. From there, we introduce the case of Malaysia, reviewing the country's history of electoral authoritarianism and the dominant cleavages that have characterized Malaysian politics since independence. We then introduce our data and analytical strategy, followed by our main results about how geography, demographic structure, and other factors predict nominations, coalitional dynamics, and electoral results. The final section concludes by placing these findings from Malaysia in comparative perspective.

Elections and authoritarian legacies in democratizing contexts

Recent literature on authoritarian legacies has argued that authoritarian rule shapes democratic competition long after the collapse of authoritarian regimes. In part, this may be because democratic advances may be fragile: Even as countries become more politically competitive and electoral turnover takes place, newly elected governments may fail to fully level the electoral playing field and democratize ruling institutions (Wahman 2014). Additionally, democratic transitions and incumbent overturn are often accompanied by significant continuity in leadership and former ruling parties, which tend to be quite successful even in more democratic elections (Miller 2021). Studies of such "authoritarian successor parties" have emphasized the legacies on which they continue to draw on under more democratic competition, including party branding, resources, and cohesive organizations (Loxton and Mainwaring 2018). Other work has focused on the effects of authoritarian legacies on individual voters, particularly on their attitudes towards democracy and their position on spatial dimensions of competition (Frantzeskakis and Sato 2020; Neundorf and Pop-Eleches 2020).

Nevertheless, electoral competition and voter behavior change in important ways following political electoral opening and political liberalization. For one, more democratic elections tend to

be more unpredictable: First elections in new democracies often feature a proliferation of new parties and high turnout (Cheibub et al. 2022). This often presents a significant information barrier for voters, given that they face an increased number of choices at the ballot box and limited knowledge about post-election behavior (Tavits and Annus 2006, 75). These factors complicate strategic voting and coordination among voters and candidates in the first post-democratic elections.

Democratization can also affect the salience of ethnic identity. In multiethnic countries with authoritarian regimes, democratization may involve the renegotiation of economic, cultural, and citizenship status for ethnic minorities (Beissinger 2008, 90-91). In Indonesia, democratization unleashed previously suppressed demands for more favorable treatment for non-dominant ethnic groups, channeled both peacefully and through violent means (van Klinken 2007, 22–23; Aspinall 2011, 294). These effects may take place at both the elite and voter level. The degree of mobilization of ethnic identity in democratizing contexts depends in part on the choices of political elites in choosing to mobilize ethnic difference (Beissinger 2008, 89–90). For voters, existing cleavages may help structure voters' choices under rapidly proliferating and new choices at the ballot box. Experimental evidence from Brazil and the US finds that voters are more likely to use racial identity as a heuristic for voting in the context of many candidates and low information. (Aguilar et al. 2015; Crowder-Meyer et al. 2020).

Based on these considerations, our expectations about electoral competition will change after political liberalization are mixed. On the one hand, we can expect voters to draw on existing heuristics to identify which parties they find most appealing, and we can expect parties to draw on their established reputations and to appeal to their existing support bases. These factors suggest that the factors that shape electoral competition under authoritarianism will still play a central role in explaining electoral competition after liberalization. On the other hand, political liberalization allows new parties and movements to join the political arena, and can change the profile of the electorate by enfranchising and/or empowering new social groups. This implies that the logic of political competition will change in meaningful ways amidst democratization. The net effect of these dynamics, which affect both the supply and demand side of politics, is ultimately an empirical matter.

The case of Malaysia

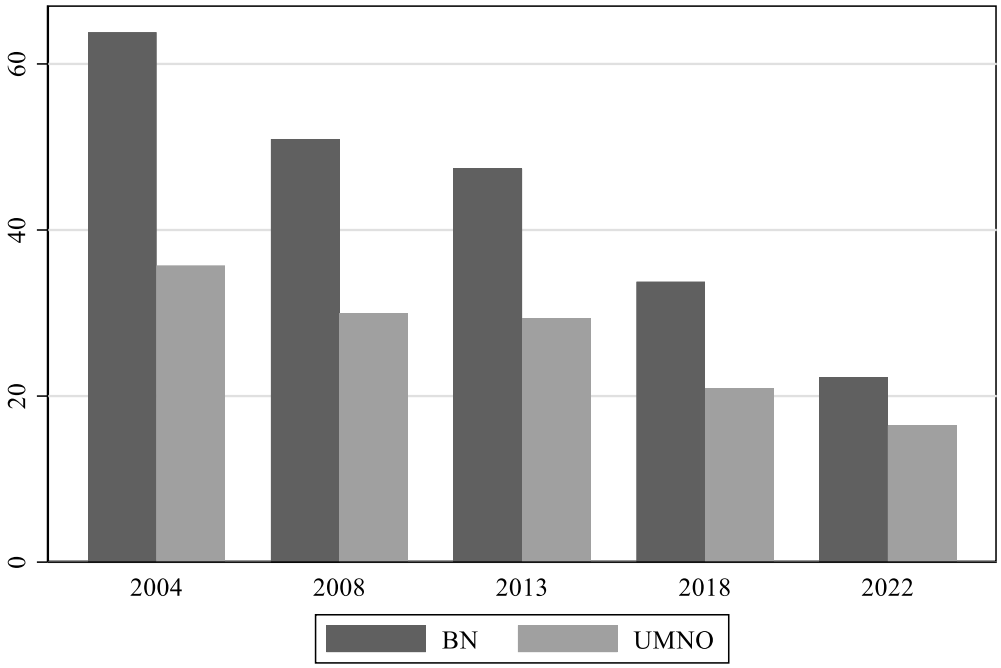
We examine these dynamics in the case of democratizing Malaysia. Over the past five years, despite political turmoil that saw multiple coalition governments, Malaysia has undertaken incremental reforms of its electoral and governing processes. Suffrage has expanded: after passing legislation that lowered the voting age to 18 and provided for automatic registration, the 2022 election saw the addition of 6.2 million new voters, a 42% increase from the 2018 election. The Electoral Commission no longer lies under the Prime Minister's Department, although the influential clean elections NGO Bersih still finds evidence of pro-government bias (Bunyan 2022). The fragility of the post-2018 ruling coalitions also precipitated greater voice and influence by the opposition, particularly a Memorandum of Understanding between the ruling government and opposition which provided political support for the government in exchange for reforms.

In other ways, however, progress remains halting. The new incumbent government retains many of the benefits that accrued to previous ruling governments under the BN, most notably access to state resources for widespread patronage (Washida 2018). But in the space of less than five years, three successive governments headed by three prime ministers were unable to use these resources to hold together their fragile ruling coalitions. While Malaysia's political incumbents still benefit from institutional and political resources that support their hold on power, political instability has made it harder for any single party or coalition to hold onto power, and so governments have proven ineffective in stabilizing voter support. In sum, while there have been advances made in terms of electoral conduct and in other key dimensions of political liberalization, these advances appear to be fragile and might be easily reversed. This was most potently illustrated by the six months of suspended parliament in 2021 under the pretext of COVID-19 management.

However, in one key dimension, it is clear that Malaysia has advanced significantly in terms of democracy. In particular, there is much higher levels of uncertainty about who will win in elections, a hallmark of democratic electoral competition. Malaysia's elections have taken place in an increasingly competitive, fluid, and fragmented political environment. One straightforward measure of electoral competition is the dominance of the largest party as measured by the share of votes (Karvonen and Anckar 2002, 15), as illustrated in Figure 1. For more than six decades, Malaysia was governed by the BN, a multiethnic coalition headed by a dominant ethnic party, the

United Malays National Organization (UMNO).[1] In the four elections prior to 2022, in measuring either the dominance of the BN coalition or UMNO itself, there has been a marked erosion of electoral support despite its many incumbent advantages. The 2022 election revealed the continued erosion of UMNO's mass support base.

Figure 1: BN/UMNO % of National Vote, 2004-2022



Other measures confirm the more open playing field that characterized the 2022 election. There was a 38% increase of the number of candidates running in 2022 compared to 2018, from 687 to 945. More of those candidates were unaffiliated with any political party: In 2018, 3% of candidates were independents; in 2022, 11% were. As a result of political fragmentation, the 2022 election saw an acceleration of trends towards the regionalization of political competition. Only one of the three major coalitions, the Alliance of Hope, contested virtually every seat in the country, while the other two contested all seats in West Malaysia but a much smaller number of seats in East Malaysia.[2] This trend is most starkly illustrated in the case of the BN: in 2018, the BN contested 100% of the seats in East Malaysia; in 2022, the coalition only contested 23%.

[1] Prior to 1973, the coalition was known as the Alliance. The size and composition of the coalition has fluctuated over time, but UMNO has always been the dominant coalition partner.
[2] This does not count smaller coalitions, such as former PM Mahathir Mohamad's Gerakan Tanah Air (GTA).

The focus of our analysis in this manuscript is how existing cleavages structure electoral competition in such a changing political environment. In the study of Malaysia, the salience of ethnicity looms large. The country is perhaps best known in the comparative literature for its entrenched ethnic politics, making an appearance in classic studies of ethnic conflict and accommodation (Lijphart 1977; Horowitz 1983). Scholars of Malaysia have long identified ethnicity as a major variable in the country's politics. Indeed, ethnic identification "became established as the dominant societal paradigm of social and political life in the country" (Milner, Embong, and Tham 2014, 1). This "race paradigm" has deep roots in Malaysian history, where British colonial control imposed an ideological racial paradigm on the country, dividing it between several main ethnic groups (Ibid, p 7).

While Malaysia's political system has become significantly more competitive over the past 15 years, ethnic identity remains an integral part of electoral competition. The importance of ethnicity is reinforced via social arrangements and institutions, including constitutional provisions which provide benefits to Malaysia's Bumiputera (indigenous) citizens, of which Malays make up the majority (see Table 1). Ethnic identity is further made central to Malaysian politics through constitutional provisions that specify that all Malays are Muslims, that define Islam as the country's official religion, and preserve the country's nine hereditary Malay sultanates as the custodians of customary authority. In elections, the importance of ethnicity has been reinforced through patterns of gerrymandering and malapportionment, where non-Malay voters have been packed into large districts while Malay voters are spread across smaller districts. Many Malaysian political parties are defined in ethnic terms, such as the long-dominant UMNO. Those political parties that are not defined in ethnic terms are often treated as they were covertly ethnic parties, or to disproportionately favor one ethnic group over the other. Two prime examples are the Pan-Malaysian Islamic Party (PAS) which appeals primarily to Malay voters (who are universally Muslims under Malaysian law), and the Democratic Action Party which has long been popular among Chinese voters.

Table 1: Ethnic Groups in Malaysia

Ethnic Category	*Ethnic Groups*
Bumiputera	Malay, Indigenous Sabah, Indigenous Sarawak, Orang Asli
Non-Bumiputera	Chinese, Indian, Other

Malaysia's ethnic demographics are therefore important to understanding political competition. The constellation of ethnic and religious demographics in the country differ regionally, and identity politics maps in different ways on to the geography of Malaysia (Ostwald and Oliver 2020). Traditionally, the most salient cleavage has been the division between East and West Malaysia. The country is physically divided between the Malay Peninsula (West Malaysia) and the island of Borneo (East Malaysia). West Malaysia is the more populous and economically developed region, with an ethnic structure constructed around the majority ethnic group of Malays, along with significant minority populations of Chinese and Indian Malaysians. East Malaysia has a more variegated structure, with Bumiputera being the majority ethnic group, along with significant Malay and Chinese minorities.[3] East Malaysia is a "region of exception" distinguished from the rest of the country by its different history of incorporation into the nation state and demographic diversity (T. B. Pepinsky 2017). Beyond the East-West divide, there are additional regional differences: In West Malaysia, the East Coast is much more heavily skewed toward Malay Muslim population, while the West Coast is more multiethnic with large concentrations of non-Malay/non-Muslim voters.

Urbanization—Malaysia's growing urban-rural divide—has often been used as a competing explanatory framework for understanding Malaysian politics (see e.g. Ramanathan 1991; Loh and Saravanamuttu 2003; Ng et al. 2015). Like the emphasis on regional trends in Malaysian voting patterns, a focus on urbanization highlights the geographic basis of Malaysian politics. But this approach builds on insights from modernization theory to argue that population density and geographic concentration in multiethnic urban areas generate new kinds of urban and cosmopolitan identities that supersede ethnic identities. The resulting prediction is that Malaysian politics will increasingly revolve around the urban-rural divide.

Table 2: Ethnic Demographics of the 2022 Voter Roll

	West Malaysia	East Malaysia
Bumiputera Malay	60.13%	17.52%
Chinese	28.04%	21.01%

[33] While Bumiputera is a term that encompasses both Malay and other indigenous groups, for the purposes of clarity we refer to Malays by their ethnic group and other indigenous groups as non-Malay Bumiputeras. In 2022, Malays were 57.7% of the population; non-Malay Bumiputeras 12.2%, Chinese 22.8%, and Indians 6.6%. (Department of Statistics Malaysia 2022).

Indian	8.93%	0.27%
Bumiputera Sarawak	0.28%	26.34%
Bumiputera Sabah	0.34%	32.19%
Other	2.26%	2.66%

Source: (Tindak Malaysia 2023)

Malaysia's political competition maps onto the country's ethnic map in complex ways. Prior to 2018, political competition was structured around multiethnic coalitions that were predominantly built around ethnic parties. As noted above, most political parties are either explicitly ethnic parties which constitutionally limit the membership and candidacy of non-coethnics, or *de facto* ethnic, where membership, candidacy, and party brand are strongly identified with a particular ethnic group. There are, however, significant exceptions, most prominently the multiethnic PKR headed by current Prime Minister Anwar Ibrahim. The 2018 elections, which brought forward a more multiethnic coalition government to power and sidelined the country's major Malay Muslim parties, led to heightened tension over ethnic and religious politics (Dettman 2020).

Because members of Malaysia's parliament are elected from single member districts, Malaysian political parties usually contest as part of multiparty coalitions. These coalitions strategically choose whom to nominate in each constituency, with the consequence that coalitions almost always nominate *one candidate per coalition* in each seat. In the three elections prior to 2022, Malaysian elections featured two-coalition competition for almost all seats in the country. In 2018, two major coalitions, along with a third party (PAS, which was likely directly sponsored by the government coalition), contested a majority of seats. However, although the entrance of a third contender had some limited effects on the results (Ostwald, Schuler, and Chong 2018), PAS was not a credible contender in many seats. 2022 was different in that *three* major national coalitions, along with regional coalitions, individual parties, and independent candidates, contested in the election, meaning that instead of two main coalition-endorsed candidates per constituency, 2022 often found three coalition-endorsed candidates per constituency. As mentioned above,

another major change in 2022 was a sharp uptick in registered voters, a result of new legislation that lowered the voting age to 18 from 21 and automatically registered all eligible citizens.[4]

In 2022, in the context of a newly competitive political environment and after nearly a decade of factional infighting within UMNO, the three national coalitions mapped onto ethnic categories in new ways. Two of the coalitions derived their support and branding from Malay-Muslim identity. The incumbent National Front (BN) coalition, much reduced from its previous size, had sharply increased its ethnoreligious branding after its non-Malay support nearly evaporated in 2008. The National Alliance (PN), a coalition of UMNO defectors, along with the prominent Islamist party PAS and an electorally marginal Chinese-majority party Gerakan, entered the election with an even more sharply Islamic and Malay platform. The third coalition, the Alliance of Hope (PH), was the most multiethnic coalition, which since its formation derived the majority of its support from non-Malay voters and espoused a moderate reform platform.

In East Malaysia, two major regional coalitions contested the 2022 election, along with one of the three national coalitions. This again was a new development: prior to 2018, the primary coalitional contenders in East Malaysia, whether regional or national parties, were from two major national coalitions. East Malaysian elections, however, have always featured higher numbers of regional parties working independently, as well as a higher number of independent candidates. The increasing regionalization of electoral competition in East Malaysia reflects longer-term trends: incorporated into the Malaysian federation in 1963, East Malaysia has long been subordinated to West Malaysia both politically and in terms of economic development. Particularly since 2008, as the ruling BN coalition became more dependent on East Malaysian support to maintain its hold on power, East Malaysian elites became increasingly vocal with demands for greater autonomy and state rights, as well as control over lucrative natural resources (Hazis 2018).

Taken together, the unprecedented influx of first-time voters, as well as significantly altered configurations of party competition at the district and national level, presented an information challenge for Malaysia's voting public. However, the coalitions and parties claimed clearly defined the terms of political competition within the country's ethnic structure.

[4] Although not analyzed in this paper, the 2022 election also marked the first test of the anti-party hopping law which came into effect shortly before the election. The law seeks to prevent individual party defections by forcing MPs that switch parties to vacate their seats and hold a by-election. This law halted the torrent of party switching by individual MPs that took place in Malaysia from 2015 onwards, and almost certainly contributed to greater stability of the post-electoral coalition currently ruling the country.

Table 3: Coalitions in Malaysia's 2022 Election

National coalitions	*Partner parties*
National Front (BN)	United Malays National Organization (UMNO) Malaysian Chinese Association (MCA), Malaysian Indian Congress (MIC), other minor parties
Alliance of Hope (PH)	People's Justice Party (PKR), Democratic Action Party (DAP), National Trust Party (Amanah). Allied with: the Youth Party (MUDA)
National Alliance (PN)	The Malaysian United indigenous Party (BERSATU), The Pan-Malaysian Islamic Party (PAS), The People's Movement Party (GERAKAN)
Regional coalitions (most prominent in East Malaysia)	
Sarawak Parties Alliance (GPS)	The United Bumiputera Heritage Party (PBB), Sarawak United Peoples' Party (SUPP), Sarawak People's Party (PRS), and the Progressive Democratic Party (PDP)
Sabah People's Alliance (GRS)	Homeland Solidarity Party (STAR), United Sabah Party (PBS), Sabah Progressive Party (SAPP), the Sabah branch of the Malaysian United Indigenous Party (BERSATU Sabah) and United Sabah National Organization (USNO Baru)

Note: Smaller coalitions, such as Gerakan Tanah Air (GTA), as well as individual parties, are not listed here.

Data

In Malaysia's 2022 election, all 222 national parliamentary seats, and seats in three out of 13 state legislative assemblies, were up for contest. Focusing on national parliamentary seats only, we match the electoral results with data from Malaysia's 2020 Census. In 2022, for the first time, this data was made available at the constituency level by Malaysia's Department of Statistics.[5] Prior to the 2022 election, the electoral information available for public consumption has tended to be limited to constituency-level election results and ethnic demographics. Ours is thus the first study to take advantage of newly available data on factors like economic development, inequality, and income, in evaluating competing explanations for voting behavior.

In the absence of demographic data at a finer-grained level, or exit polling data, we proceed descriptively, examining the relationship between constituency-level characteristics and the

[5] https://kawasanku.dosm.gov.my/

associated electoral results. Mindful of the differences in coalition structure and electoral competition in peninsular Malaysia versus East Malaysia, we conduct separate analyses of the two regions.

Our main explanatory variables are ethnicity and urbanization. Ethnicity data are reported for each constituency in the country as a four-category compositional variable recording the percentage of each population that is Bumiputera, Chinese, Indian, or Other. In peninsular Malaysia, the vast majority of Bumiputera respondents are ethnic Malays, so the correlation between Bumiputera population share and any outcome variable captures the Malay/non-Malay ethnic cleavage. Because of East Malaysia's ethnic structure is considerably more complex, the category Bumiputera includes Malays (who are not the majority ethnic group in either Sabah or Sarawak) as well as Iban (the majority ethnic group in Sarawak), Bidayuh, Kadazandusun (the largest ethnic group in Sabah), Bajau, Melanau, and many others. This means that the correlation between Bumiputera population share and any outcome variable in East Malaysia cannot be interpreted as capturing the Malay/non-Malay ethnic cleavage found on the peninsula.

We construct a measure of urbanization by first dividing each constituency's population by its land area in km^2. This gives us a measure of population density which is highest in small constituencies with large populations, such as in Kuala Lumpur and other urban constituencies, and lowest in large constituencies with small populations, like the large rural constituencies in northeast Malaysia. We also classify constituencies into one of four different categories of urbanization—urban, semi-urban, semi-rural, and rural—which we define as the four quartiles of the population density variable (separately defined for peninsular Malaysia and East Malaysia). This categorization allows us to look for nonlinear relationships between urbanization and electoral outcomes, to check if urban constituencies in particular are more likely to have voted for PH.

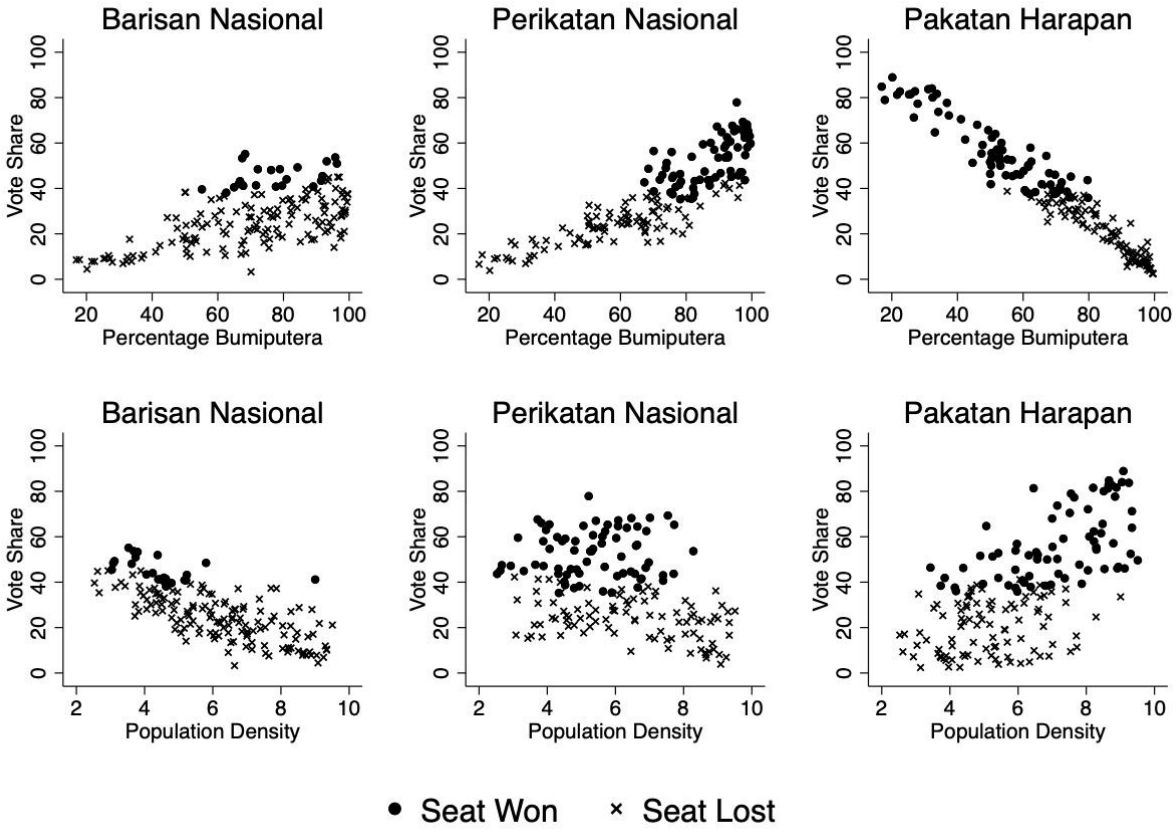
Analysis

Peninsular Malaysia

We begin our analysis by examining peninsular results for BN, PN, and PH coalitions. Figure 1 compares the percentage of each constituency which is Bumiputera with the vote share for each of the three coalitions (top three scatterplots), and the natural logarithm of population density (in population per km^2) with the vote share for each of the three coalitions (bottom three

scatterplots). In each scatterplot, circles correspond to constituencies where that coalition won the seat, and crosses denote constituencies where that coalition lost the seat.

Figure 1: Ethnicity, Urbanization, and Vote Share (Peninsular Malaysia)



The results in Figure 1 provide strong evidence that the Malay/non-Malay cleavage explains electoral results on the peninsula. PH performed very well and won handily in non-Malay peninsular constituencies, and lost in Malay-majority peninsular constituencies. PN, and to a lesser extent BN, performed well only in Malay-majority constituencies, where the two coalitions competed for Malay Muslim voters.

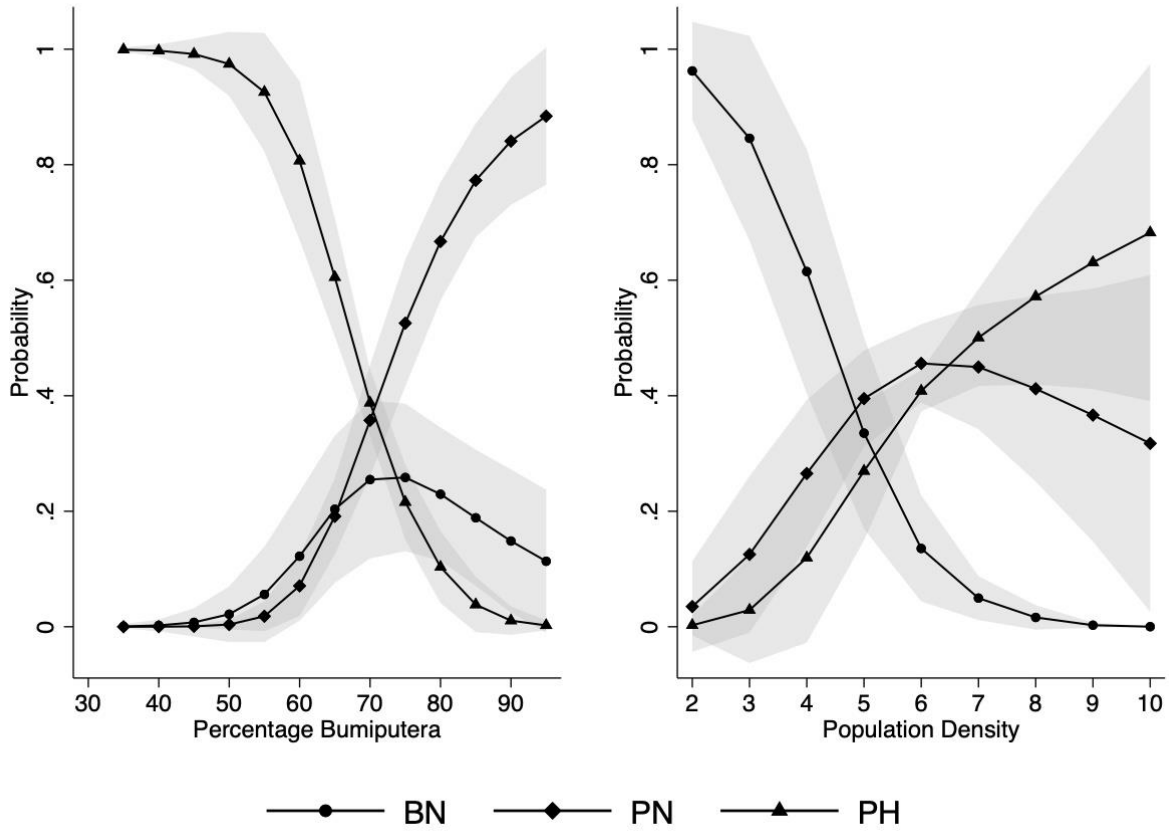
Urbanization, proxied here by population density, is not as strong of a predictor of vote results in peninsular constituencies in Figure 1. Although there is generally a negative relationship between urbanization and BN/PN vote shares, this relationship is not as tight as in the case of Bumiputera population share. The data show that there are urban constituencies in peninsular Malaysia that nevertheless turned out for PN and BN; combined with the results by ethnicity, we can infer that these must be urban areas with large Malay majorities, such as Kota Bharu in the

northeastern state of Kelantan and Kuala Terengganu in the neighboring state of Terengganu, where PAS candidates won two-thirds of the seats and over 90% of the population is Malay.

To examine these results further, we estimate a multinomial logistic regression in which we predict the probability that each of the three coalitions wins in a peninsular constituency as a function of population density and Bumiputera population share. As predictors we also include the natural logarithm of constituency area (in km^2), the natural logarithm of constituency population, the labor unemployment rate, the median income, the Gini coefficient, and the total number of agricultural sector businesses as a percentage of constituency population. Including these additional constituency-level predictors helps to account for other socioeconomic factors (such as rural economic structure or income inequality) that might explain election outcomes.

We present the numerical results in Appendix Table A1, but to facilitate interpretation we adopt a graphical approach, plotting the predicted probability of victory for each of the three coalitions across the range of values of Bumiputera population share and population density in Figure 2.

Figure 2: Predicted Probability of Winning (Peninsular Malaysia)



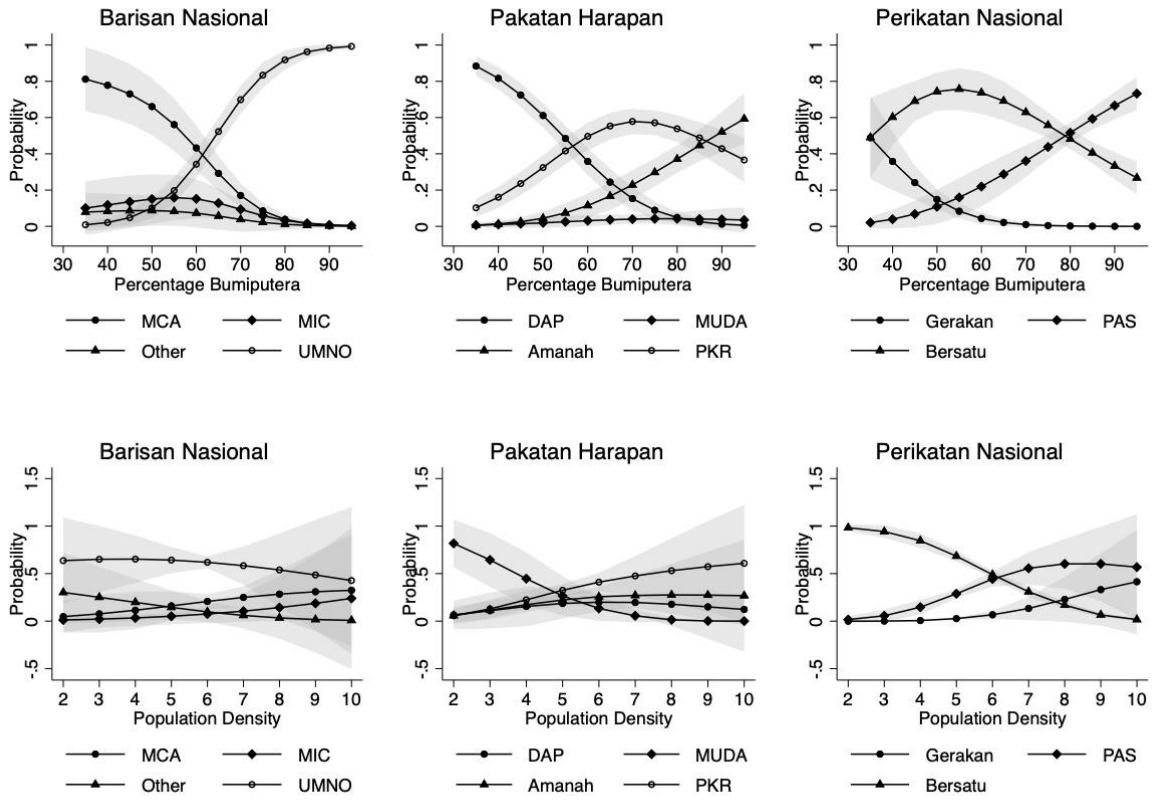
The left-hand figure shows that PH was almost certain to win in peninsular constituencies with majority non-Malay populations, but its chances of winning approached zero in districts with more than 80% or so Malay population. In those districts, PN was most likely to win, followed distantly by BN. The most competitive seats were those with small Malay majorities but substantial non-Malay populations, where all three coalitions had some success.

The right-hand figure shows that the BN was only competitive in the most rural constituencies with the lowest population densities, indicating that UMNO's rural base remained strong. PH and PN were most successful in more densely settled urban constituencies. Importantly, however, both PH and PN had roughly the same chance of winning in all types of constituencies: although PH was more likely to win in the most densely settled constituencies, so was PN, and the overlapping gray error bars show that these two coalitions' probabilities of winning is statistically indistinguishable from one another. As before, we can surmise that this result reflects the fact that

PN was very successful in urban Malay-majority constituencies in the northeast, whereas PH was very successful in urban non-Malay-majority constituencies in the rest of the peninsula.

We can probe these issues further by looking at the parties nominated by each coalition, which is possible because in peninsular constituencies, each coalition nominated exactly one candidate from one party. We estimate multinomial logistic regressions with the same form as above, but instead of predicting which coalition won, we predict which party was nominated from each coalition. Numerical results appear in Table A2, with graphical results presented in Figure 3.

Figure 3: Party Nominations (Peninsular Malaysia)



Starting with ethnic structure (top three figures), we learn that the BN nominates UMNO in Malay-majority constituencies, and other its minority parties' counterparts—usually MCA—in non-Malay-majority constituencies. Looking next to PH, the pattern for DAP nominations is nearly the same as for MCA, but PKR is most likely to contest in mixed districts and Amanah in constituencies with the largest Malay population share. The PN pattern is different still: PAS

contests in the constituencies with largest Malay majorities, whereas Bersatu contests in mixed constituencies, and Gerakan only in those with large non-Malay population shares.

Nomination patterns are less consistently related with population density, our summary measure of urbanization (the bottom three figures in Figure 3). There is no relationship at all between population density and the likelihood that the BN nominates any of its component parties. In the case of PH, population density does predict nominations for MUDA, which is more likely to be nominated in the least densely populated rural constituencies. Population density is most consistently predictive of nomination patterns for PN, which nominated PAS in low density rural constituencies and was more likely to nominate Bersatu in semi-urban and urban districts, although we note that PN was equally likely to nominate each of its three component parties in urban districts.

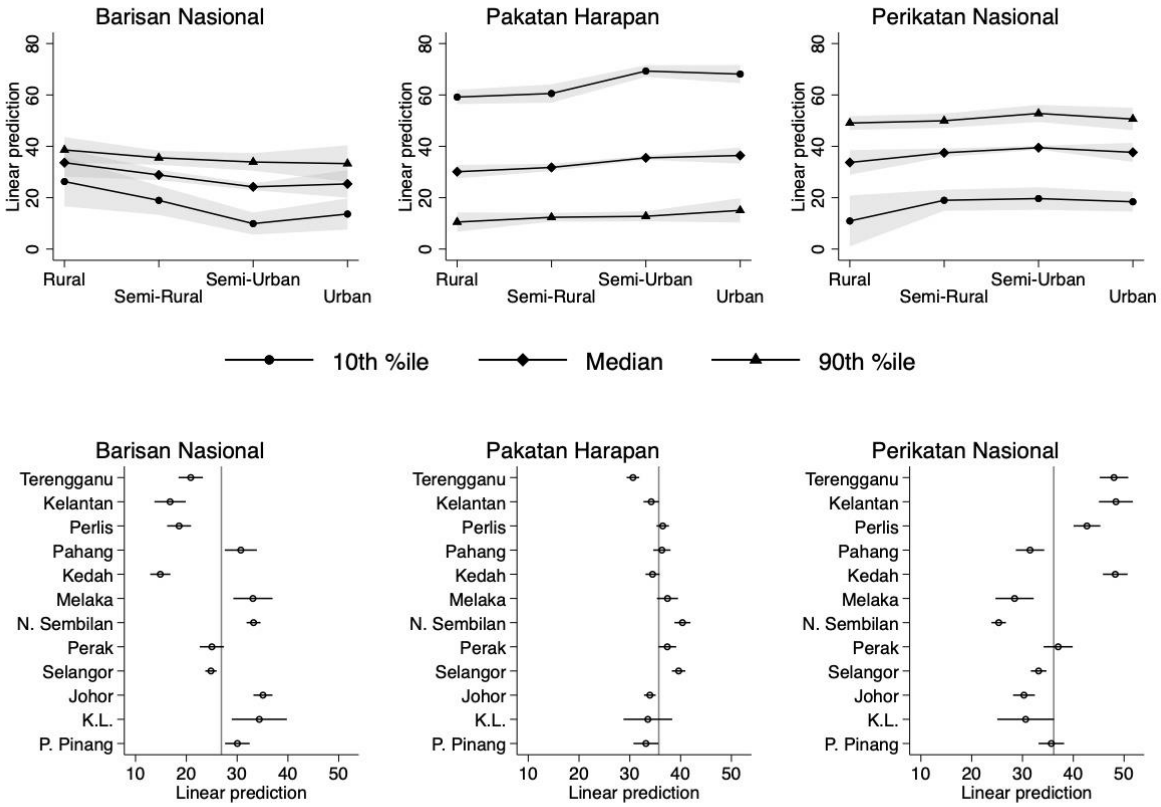
To summarize, data from peninsular Malaysia reveal the continuing influence of ethnic structure and urbanization on electoral competition in GE15. Constituency-level ethnic structure affects which parties are nominated within coalitions, as well as how coalitions fared in the election. Population density, a proxy for urbanization, also predicts nomination patterns and electoral outcomes, with the BN faring much better in rural constituencies than in urban ones. But as past research on ethnicity and urbanization in Malaysia has observed (Ng et al. 2015; T. Pepinsky 2015), ethnic structure and urbanization are highly correlated with one another for historical reasons. Across peninsular constituencies in our data, the correlation between population density and Bumiputera population share is -.51.[6] And as we noted previously, peninsular Malaysia's East Coast states tend to be more rural and Malay than the West Coast, so urban centers in Kelantan and Terengganu have large Malay majorities whereas Kuala Lumpur, Malacca, and Penang on the West Coast are more evenly divided between Malay and non-Malay populations. This suggests that geographic and demographic factors might interact.

To complete our analysis of peninsular Malaysian results in GE15, we examine how regional factors interact with constituency demographics. To do so, we estimate constituency-level vote share in regressions that replace the population density variables with our four-category measure of urbanization, and interact that variable with Bumiputera population share while also including state fixed effects.[7] This strategy allows us to estimate whether the relationship between

[6] Spearman's $\rho = .509$, $p < .0001$.
[7] We treat the Federal Territories of Putrajaya and Kuala Lumpur as a single state.

Bumiputera population share and electoral results varies across urban, semi-urban, semi-rural, and rural constituencies while also allowing for state-level factors to predict election results as well. The statistical results appear in Table A3, and we present the main findings in Figure 4.

Figure 4: Regional Factors (Peninsular Malaysia)



In the top three figures, we predict the constituency-level vote share for each coalition in each of the four levels of urbanization, with the Bumiputera population share at the peninsular median and tenth and ninetieth percentiles. The results are clear: BN and PN were more successful in Malay-majority constituencies across all levels of urbanization, and PH was more successful in non-Malay majority constituencies, again across all levels of urbanization. Urbanization itself has only a small residual relationship with election results for any party.

The bottom three figures of Figure 4 plot the predicted vote share for each of the eleven peninsular Malaysian states and the Federal Territories of Kuala Lumpur and Putrajaya. The vertical line corresponds to the average vote share for each coalition across peninsular

constituencies. Points to the left of each line mean that the coalition underperformed in that state relative to its peninsular performance more generally. States are ordered by their Bumiputera population share, with the East Coast States of Terengganu and Kelantan at the top and the West Coast state of Pulau Pinang at the bottom.

The three East Coast states of Terengganu, Kelantan, and Pahang comprise three of the five states with the largest Malay majorities in peninsular Malaysia. Together with Kedah and Perlis, they comprise a region sometimes termed the "Malay Belt" for its relatively large Malay population share. The bottom three figures in Figure 4 reveal that with the important exception of Pahang, the BN underperformed in Malay Belt states, and the PN overperformed in these same states. The anomalous results for Pahang are unsurprising in historical perspective, for even though Pahang has a large Malay majority population, it is not typically considered a part of the Malay Belt, and has historical and political ties with Johor to the south.

In all, this analysis reveals that the East Coast/West Coast distinction in peninsular Malaysian politics is less predictive of election results than is a comparison between the Malay Belt and the rest of the peninsula. Attending to regional factors beyond constituency-level demographics reveals that the BN's poor showing is a result of Malay constituencies in the Malay Belt shifting away from the BN and in favor of PN. Urbanization remains a good predictor of electoral results, but by carefully analyzing urbanization in different regional contexts in peninsular Malaysia, we find that ethnic structure conditions its relationship with electoral outcomes. Knowing that a constituency like Kota Bharu is urban is less important for predicting election results than knowing that it is a mostly Malay city in the Malay Belt.

Sabah and Sarawak

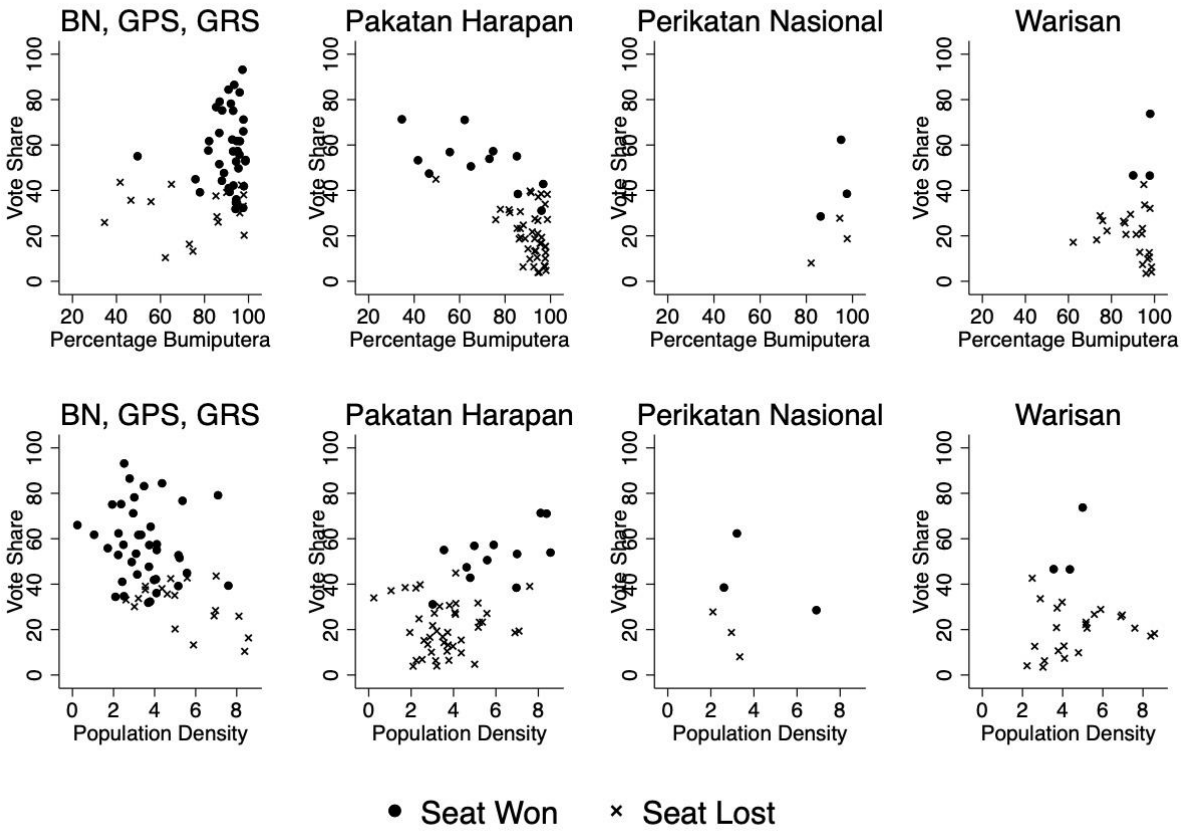
Looking to East Malaysia, the analysis of electoral results is more challenging due to four features of East Malaysian politics. First, each state has its own coalition of parties based in that state only: Gabungan Rakyat Sabah and Gabungan Parti Sarawak. Second, the BN does not compete in Sarawak at all, for UMNO is only registered as a political party in Sabah. Third, neither PH nor PN ran candidates in every East Malaysian constituency, with PH running candidates in 55 out of 57 constituencies but PN fielding candidates in only six East Malaysian constituencies (two in Sabah and four in Sarawak). And fourth, the East Malaysia-based Warisan coalition ran in each constituency in Sabah, but in no constituencies in Sarawak.

We can nevertheless look carefully at the history of state politics in each country to help interpret the election and its results. Sabah's GRS consists of a handful of small parties who formed a coalition in opposition to PH and its former ally Warisan, in alliance with both the BN and PN. In GE15, with BN and PN competing against one another, GRS coordinated with BN to divide nominations, with GRS and BN each running candidates in 13 of the state's 26 constituencies. Sarawak's GPS likewise consists of a handful of small parties that had been part of the BN's federal coalition until 2018. This means that every constituency in East Malaysia was contested by exactly one candidate from the BN, GPS, or GRS. This fact allows us to test for a relationship between ethnic structure and urbanization and election results in East Malaysia, just as in peninsular Malaysia.

But although GPS and GRS have historical links to the BN, the character of East Malaysian politics differs from peninsular Malaysia. Some parties within GPS and GRS focus on Bumiputera issues, but most do not. GPS and GRS instead gather together regionally focused parties, with members drawn from multiple ethnic groups, including Sabahans and Sarawakians of Chinese descent. Still, the long association between the BN and the component parties of GPS and GRS means that the latter benefit from their history of access to government resources and patronage, used in previous decades to shore up support from rural East Malaysians who tend to be Bumiputeras.

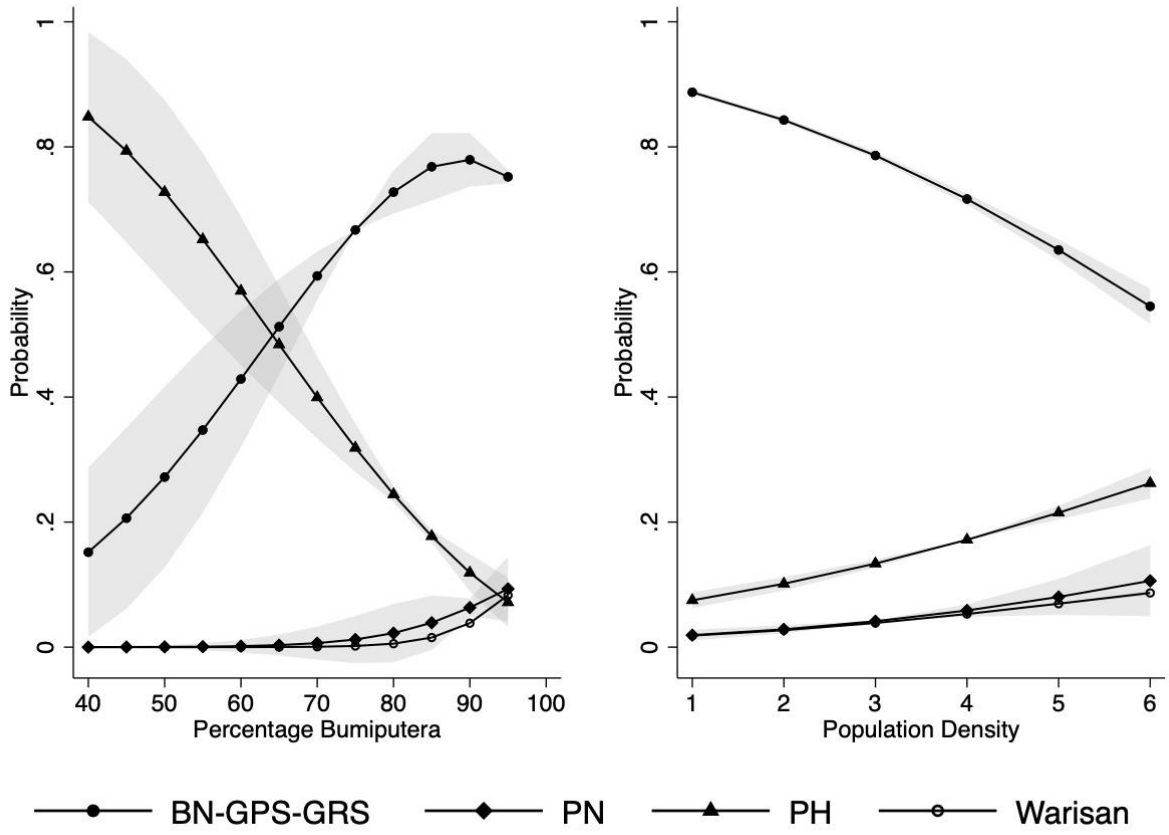
In Figure 5, we examine the relationship between Bumiputera population share (top four plots), population density (bottom four plots), and election results. Although we might not expect a close link between ethnicity and election results in East Malaysia given that most parties are not ethnically based, when we consider the BN, GPS, and GRS together we indeed discover that these parties tended to fare particularly well in constituencies with large Bumiputera majorities. This success comes at the expense of PH, which tended to fare best in ethnically mixed districts. Although numbers are small, we tend not to find such a close link between PN results and ethnic structure; so too with Warisan.

Figure 5: Ethnicity, Urbanization, and Vote Share (East Malaysia)



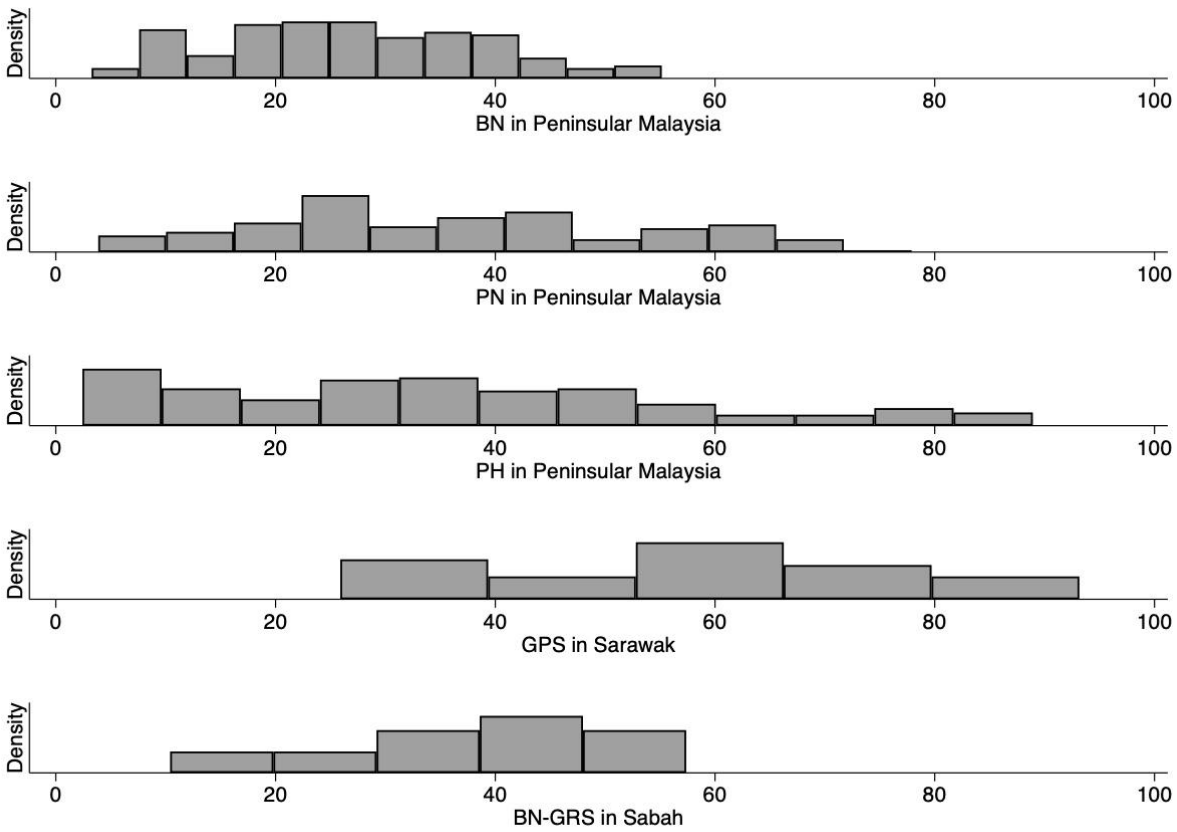
We also see an even stronger relationship between urbanization and election results in East Malaysia than in the peninsula: the BN, GPS, and GRS each fared best in rural constituencies, with the opposite holding true for PH. These same results also hold when we predict the probability of victory for each of these four coalitions, as shown in Figure 6.

Figure 6: Predicted Probability of Winning (East Malaysia)



It is striking to find such strong links between ethnicity and election results in East Malaysia given the differences in ethnic politics and ethnic demography between the peninsula and Sabah/Sarawak. And yet we must understand this relationship in East Malaysia on its own terms. One notable finding from Figure 5 is just how dominant the BN, GPS, and GRS are in some of the most Bumiputera constituencies, winning more than 80% of the vote in some constituencies. Figure 7 compares the distribution of vote shares for GPS in Sarawak with those for BN-GRS in Sabah and the three peninsular-based coalitions, revealing that GPS parties were dominant in many of the constituencies where they contested, unlike BN-GRS in Sabah.

Figure 7: Comparing Vote Shares



The most likely explanation for this pattern is the patronage resources available to GPS component parties, specifically PBB (Parti Bersatu Bumiputera) which they can target to rural districts with large Bumiputera majorities. These are entirely different from those constituencies where PH dominated to a similar degree on the peninsula, which are almost entirely urban districts with non-Malay majorities.

Ethnicity and urbanization across territorial cleavages

Some scholars have urged analyses of Malaysian politics to look beyond the "race paradigm" (Milner, Embong, and Tham 2014). For one, voters from the dominant Malay ethnic group are split along regional, religious, and possibly class lines (Weiss and Hazis 2020). Second, political discourse has increasingly a "developmentalist" approach that emphasizes economic issues, developmental politics, and economic growth (Loh 2008). However, our analysis of Malaysia's 2022 parliamentary election shows the continuing relevance of ethnic structure

understanding elections in Malaysia's newly competitive party system. Despite the significant rise in electoral competitiveness in Malaysia's elections, and the fragmentation of ethnic support among multiple competing parties and coalitions, the paradigm of ethnic politics still remain paramount.

That said, amidst such signs of continuity in Malaysian politics, 2022 also highlights some new developments in Malaysian electoral politics that have emerged alongside the country's liberalizing political environment. First, the 2022 election reveals further trends towards the regionalization of political competition. This was driven in part by dynamics that are internal to the country's coalitional politics: specifically, the fragmentation of the once-dominant BN coalition encouraged elites in East Malaysia to form independent coalitions and parties that focused on regional grievances and political and ethnic identities. Some parties attempted to bridge these regional divides, but with limited success: Parti Warisan (the Heritage Party) contested 26 seats in West Malaysia, leaving its existing base in East Malaysia, but did not win more than 3% of the vote in any of those seats. In East Malaysia, the West Malaysian-centered parties only won 32% of seats they contested.

Within West Malaysia, the 2022 election also revealed continuing differences between non-Malay majority districts and Malay-majority districts. Among Malay-majority districts, the role of geography was key in explaining the shift to PN compared to BN. The parties of the conservative PN coalition were the BN's main rivals for the Malay vote, and they swept the elections in the "Malay Belt" of the country.[8] PN's machinery and electoral strength in heavily Malay areas, and its reputation as a "clean" Islamic alternative, were likely crucial in positioning it as a credible champion of Malay Muslim rights.

Complementing other work that has cast doubt on the importance of the rural-urban dichotomy in explaining political interest or activity in Malaysia (Ong 2020), we find that urbanization does not provide a compelling explanation for predicting voter choice in 2022. Our results indicate that urbanization does not contribute much explanatory leverage over vote choice once we take into account ethnic demographics and regional differences that reflect the deep historical foundations of contemporary Malaysian politics.

[8] This trend was not entirely confined to regional swings: the PN coalition, most notably PAS, made unexpected headway in other parts of the peninsula.

Of course, our emphasis on the structure of political competition in liberalizing Malaysia is not designed to capture all of the specific campaign issues that animated parties, candidates, and voters in GE15. For example, the election was seen by many Malaysians as a referendum on the three prime ministerial candidates who headed the three major pre-electoral coalitions, including sitting PM Ismail Sabri (and his presumptive replacement as PM, UMNO President Zahid Hamidi), former PM Muhyiddin Yassin from BERSATU, and long-time opposition leader Anwar Ibrahim. Other factors, such as the state of economy and the differing policy emphases of the coalitions, undoubtedly played a role in voter choice. In a poll taken in the days leading up to the November 2022 election, 64% of survey respondents identified economic growth and the cost of living as their paramount concerns in the next election, while issues of Malay rights and racial equality were a top concern of only 4% of respondents (Merdeka Center 2022). Among the top factors influencing vote choice, 25% of respondents identified political party as the top factor, 25% the candidate contesting the seat, 29% the prime ministerial candidate, and 17% the issue (Ibid.).

Yet even as these new issues animated voters and campaigns during before and during GE15, ethnic identity remained a significant part of the political campaign. Similar to previous elections in Malaysia, candidates and parties in the 2022 election continued to deploy a mix of economic messaging, valence issues, and the framing of racial grievances to appeal to voters and to differentiate themselves from their competitors. In GE15, the conservative PN coalition was perhaps most prominent in amplifying these messages, with Muhyiddin Yassin warning of Christianization of the country's Muslims in a widely shared TikTok clip. And a preliminary analysis of Malaysia's social media environment found that accounts associated with another prominent PN politician—PAS president Hadi Awang—were key amplifiers of divisive racial and religious speech during the election (Zurairi 2022).

Stepping back from the specifics of GE15, we can identify institutional factors that, in combination with party strategies and voter expectations, make it difficult to transcend ethnic politics even in a newly liberalized political environments such as Malaysia in 2022. As shown earlier, Malaysian coalitions still largely follow existing traditions of nominating parties and candidates from a constituency's ethnic majority. This leaves voters with few choices in terms of rejecting ethnically-bases campaigns, and encourages candidates to compete for votes by emphasizing their ability to represent ethnic interests. Moreover, heuristics like party and

coalition brand, and the ethnic identity of candidates, help to inform voter choice. It is likely that this elite structuring of voter choices tempered the effects of the proliferation of new candidates and choices found in new democracies (Tavits 2008). While Malaysian voters were presented with more choices in GE15 than ever before, existing party and coalition party brands were already established. And new parties and coalitions, compelled by electoral incentives to define themselves against the ethnically-defined status quo, struggled to transcend this underlying political cleavage.

Conclusion

This manuscript has investigated how social cleavages that define political competition in electoral authoritarian regimes evolve under conditions of political liberalization and open political competition. We have found that the core ethnic logic of Malaysian politics still structures coalition politics, party strategy, and voter behavior. But we have also shown that in this period of heightened political competition, regional differences within Malaysia that were relatively muted under electoral authoritarian rule have emerged as central points of division. First among these is the obvious divide between West and East Malaysia, with the latter's political importance growing as the BN regime's former hold on West Malaysian politics has evaporated. Second among these is the divide between the Malay Belt of northeastern peninsular Malaysia and the more multiethnic areas of the West Coast. Neither of these regional factors is new in Malaysian politics—PAS has always had a stronghold in Kelantan, for example, and politics in Sabah and Sarawak has always differed from the peninsula—but they became newly important in an environment of political liberalization and with the BN's slow decay as the dominant political coalition in Malaysia.

By way of conclusion, we emphasize that Malaysia's political liberalization remains ongoing. The unseating of the BN coalition in 2018 generated a wave of enthusiasm about the prospects for democratic reform, but the lackluster performance of the incoming PH government, and subsequent political turmoil, have frustrated progressives, reformers, and anti-BN groups more generally. It would be a mistake to conclude that Malaysia has completed a transition to democracy.

Nevertheless, Malaysia's electoral environment is significantly more competitive and unpredictable than it has been since the 1960s—more so than during periods of intense intraregime contestation such as the late 1980s, the late 1990s, and the late 2000s. With new

actors, new parties, and a more complicated electoral environment in which three national coalitions contested in most constituencies, an electoral contest in which the same core issues animated parties and voters produced a surprising outcome: the long-time opposition leader Anwar Ibrahim assumed position of Prime Minister, backed by an unlikely alliance of Anwar's PH coalition and their long-time foes in BN. Such a coalition government, unthinkable prior to 2018, fundamentally alters the country's political landscape. But even here, the legacies of competitive authoritarianism are clear. Negotiations to form the government took place even as top BN personnel, most notably the president of UMNO Zahid Hamidi, face corruption charges related to their time in government under the BN. Although much can change over the coming years, seems unlikely that the current government has the political will to pursue corruption charges or enact further democratic reforms.

Because our analysis focuses on nominations and electoral returns, we lack the fine-grained data that exit polling can provide, or that might be uncovered from an analysis at a lower level of analysis. Another limitation to our analysis comes from what are termed "outstation" voters: most typically, voters who remain registered to vote in their home villages, but live and work in one of the country's large urban centers. It is likely that more than 20% of Malaysians are internal migrants (Ong 2020, 37), but it is difficult to determine where they are, or how their presence or absence might affect the substantive conclusions that we have drawn from this analysis. And naturally, because our focus is on the structure of political competition in GE15, our analysis cannot capture the role of individual personalities, social movements, or activist networks in shaping the future course of Malaysian politics. We propose that to anticipate how Malaysian politics will unfold in the coming decade, it will be essential to marry our analysis of ethnicity and regionalism with an analysis of how new issue areas become politicized and their potential to upset Malaysia's existing cleavage structure.

What would it take to shift Malaysia from the "race paradigm"? So far, the slow pace of democratic reform has stymied further changes. Most notably, wide-ranging electoral reforms, such as moving away from a SMD plurality system or introducing local elections remain unlikely in the short term. The new government under Anwar Ibrahim is likely to prioritize economic growth, improved governance, and stability over the reform agenda (Ostwald and Nadzri 2023). The election results have also led to a political dynamic where the ruling government is significantly more pluralistic than its Islamist opposition; and where the Islamist

opposition made significant electoral gains among Malay voters (Chin 2023, 11; Slater 2023). Although we urge analysts to carefully follow new actors pursuing new issues in the wake of the 2022 elections, ethnically informed competition and polarized politics will continue under more competitive and democratic elections in Malaysia.

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Appendix

Table of descriptives

Table A1: Predicting Victory (Peninsular Malaysia)

	PN	**PH**
	(relative to BN)	
Bumiputera Population Share	0.090	-0.258**
	(0.046)	(0.097)
Population Density	2.061*	3.194*
	(0.817)	(1.243)
Ln(area (km^2))	1.218	3.336*
	(0.757)	(1.700)
Unemployment Rate	0.073	-0.207
	(0.390)	(0.444)
Median Income	-0.001	0.000
	(0.000)	(0.000)
Gini	-2.348	5.026
	(5.512)	(5.859)
Ln(Agricultural Businesses/Population)	-1.148	-1.267
	(0.749)	(0.811)
Constant	-22.191*	-24.512
	(9.379)	(15.588)

N = 165. * $p < .05$, ** $p < .01$, *** $p < .001$. Standard errors clustered by state in parentheses.

Table A2: Predicting Nominations (Peninsular Malaysia)

	BN (relative to UMNO)			**PH (relative to PKR)**			**PN (relative to Bersatu)**	
	MCA	*MIC*	*OTHER*	*DAP*	*MUDA*	*PAN*	*Gerakan*	*PAS*
Bumiputera Population Share	-0.193***	-0.153***	-0.174**	-0.118***	0.010	0.061***	-0.127***	0.077***
	(0.030)	(0.026)	(0.054)	(0.016)	(0.055)	(0.018)	(0.033)	(0.021)
Population Density	0.414	0.602	-0.565	-0.501	-2.355***	-0.059	2.319***	1.504*
	(0.864)	(0.765)	(0.807)	(0.557)	(0.709)	(0.423)	(0.555)	(0.624)
Ln(area (km^2))	0.715	1.416*	-0.622	-0.019	-2.920***	-0.189	2.193***	0.820
	(0.762)	(0.662)	(0.840)	(0.494)	(0.731)	(0.475)	(0.572)	(0.614)
Unemployment Rate	0.062	0.363	0.500	-0.280	-1.198**	0.175	0.410	-0.162
	(0.346)	(0.494)	(0.395)	(0.224)	(0.400)	(0.185)	(0.404)	(0.096)
Median Income	-0.000	-0.000	-0.000	0.000	-0.000	0.000	-0.000	-0.000**

	(0.000)	(0.000)	(0.000)	(0.000)	(0.000)	(0.000)	(0.000)	(0.000)
Gini	-7.119	-5.735	-9.292	-0.748	11.589	-5.158	-8.641*	-12.581**
	(4.883)	(10.005)	(6.636)	(3.589)	(6.056)	(4.231)	(3.434)	(4.474)
Ln(Agricultural Businesses/Population)	-1.154	-0.955	-2.097	0.115	0.195	0.398	0.966*	0.373
	(0.630)	(0.507)	(1.075)	(0.250)	(0.740)	(0.346)	(0.466)	(0.320)
Constant	5.761	-4.579	13.462	11.300*	28.416***	-2.528	-17.704**	-12.442*
	(9.711)	(7.342)	(7.147)	(4.853)	(8.125)	(5.521)	(5.547)	(6.336)

N = 165. * $p < .05$, ** $p < .01$, *** $p < .001$. Standard errors clustered by state in parentheses.

Table A3: Regional Analysis (Peninsular Malaysia)

	BN Vote Share	**PH Vote Share**	**PN Vote Share**
Bumiputera Population Share	0.205*	-0.808***	0.633***
	(0.073)	(0.033)	(0.070)
Semi-Rural	-9.913	1.083	12.443
	(4.776)	(2.695)	(6.551)
Semi-Urban	-23.518**	14.921***	11.786*
	(5.552)	(3.075)	(4.789)
Urban	-17.104	11.634**	11.099
	(9.009)	(3.083)	(8.166)
Semi-Rural×Bumiputera Population Share	0.071	0.008	-0.119
	(0.056)	(0.032)	(0.063)
Semi-Urban×Bumiputera Population Share	0.194**	-0.131*	-0.083
	(0.053)	(0.048)	(0.039)
Urban×Bumiputera Population Share	0.121	-0.073	-0.098
	(0.090)	(0.045)	(0.070)
Ln(Area (km2))	1.257	-0.298	-0.465
	(1.057)	(0.616)	(0.852)
Unemployment Rate	1.005	0.004	-1.336
	(0.853)	(0.424)	(0.945)
Median Income	-0.001	0.001**	-0.000
	(0.000)	(0.000)	(0.000)
Gini	14.619	3.368	-21.014
	(10.820)	(9.489)	(9.915)
Ln(Agricultural Businesses / Population)	0.263	0.637	-0.573
	(0.909)	(0.856)	(1.061)
K.L.	4.318	0.378	-5.054*
	(2.206)	(1.867)	(2.163)

Johor	5.038**	0.770	-5.385**
	(1.439)	(1.475)	(1.351)
Selangor	-5.200***	6.435***	-2.499*
	(0.936)	(0.889)	(1.000)
Perak	-5.020**	4.206*	1.349
	(1.558)	(1.683)	(2.118)
N. Sembilan	3.189*	7.190**	-10.355***
	(1.373)	(1.690)	(1.333)
Melaka	3.068	4.241*	-7.234***
	(2.316)	(1.450)	(1.156)
Kedah	-15.174***	1.305	12.589***
	(1.386)	(1.286)	(1.855)
Pahang	0.678	3.134	-4.189
	(2.254)	(1.761)	(2.078)
Perlis	-11.471***	3.307*	7.010**
	(1.607)	(1.282)	(2.099)
Kelantan	-13.245***	1.042	12.714***
	(2.214)	(1.544)	(2.260)
Terengganu	-9.182***	-2.554	12.341***
	(2.009)	(1.494)	(2.371)
Constant	10.877	81.412***	3.698
	(11.887)	(3.941)	(11.647)

N = 165. * $p < .05$, ** $p < .01$, *** $p < .001$. Standard errors clustered by state in parentheses.