



LOWY INSTITUTE
POLL
2019

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UNDERSTANDING
AUSTRALIAN
ATTITUDES
TO THE WORLD

PREFACE

2019 is a year of elections in the Asia-Pacific region, including in Indonesia, India and Australia. Each of these three democracies has re-elected incumbents, choosing stability in difficult times.

Every day, the liberal international order seems less liberal, less international and less orderly. Both Washington and Beijing are seeking to revise the international status quo. Australia's leadership role in the Pacific is being tested. Cracks in the international economy appear to be widening.

These issues were all but invisible, however, in the 2019 Australian federal election campaign. The world hardly intruded on our national debate. This is too bad. The rapid changes to Australia's external circumstances deserve serious discussion.

Certainly, Australians are aware of developments abroad and some of their opinions on international issues are changing. Notably, Australians' views towards China seem to have soured. In 2019, trust in and warmth towards China are at their lowest points in the Poll's history. Most Australians say that Australia's economy is too dependent on China and Australia should do more to resist China's military activities in our region. Scepticism continues about Chinese investment in Australia and China's intentions in the Pacific.

The pace of China's rise and the presidency of Donald Trump both seem to be weakening Australians' confidence in the United States. More Australians than in previous years believe that the United States is declining relative to China. Confidence in President Trump is at lower levels than confidence in Chinese President Xi Jinping. Two-thirds of Australians believe that President Trump has

weakened the alliance. On the other hand, more than seven out of ten Australians still believe the alliance is either very or fairly important for Australia's security.

For the first time in the history of the Poll, climate change topped the list of threats to Australia's vital interests in 2019, alongside cyberattacks, international terrorism and North Korea's nuclear program. And although power blackouts and energy prices have dominated Australian headlines, policymakers may be surprised to find more Australians want the federal government to reduce emissions than prevent blackouts or keep prices down.

Australians are optimistic on some subjects. While economic nationalism and concerns about globalisation are on the rise around the world, Australians remain firmly committed to free trade and globalisation. Australians look to New Zealand as our best friend in the world, and more of them have confidence in New Zealand Prime Minister Jacinda Ardern to do the right thing in world affairs than any other world leader we asked about.

The Lowy Institute Poll, now in its fifteenth year, offers valuable insights into Australians' views on the questions that preoccupy diplomats and world leaders. In other words, the Poll serves a democratic function. It helps us to understand how Australians see the world, and it gives Australians an opportunity to have their say on our country's relationship with the world.

Dr Michael Fullilove
Executive Director
June 2019

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EXECUTIVE SUMMARY

Relations with major powers

Only 32% of Australians say they trust China to 'act responsibly in the world', in a 20-point fall since 2018 and the lowest level of trust in China ever recorded in our polling. A bare majority of Australians (52%) trust the United States to act responsibly, which is steady from last year.

Half of Australians (50%) believe 'the Australian government should put a higher priority on maintaining strong relations with the United States, even if this might harm our relations with China'. A sizeable minority (44%) say Australia 'should put a higher priority on building stronger relations with China, even if this might harm our relations with the United States'.

Confidence in world leaders

Only 30% of Australians have confidence in China's President Xi Jinping to do the right thing in world affairs, a 13-point drop since 2018. One-quarter of Australians (25%) have confidence in US President Donald Trump, a five-point drop from 2018.

Australians' highest level of confidence among the nine leaders polled is placed in New Zealand's Prime Minister, Jacinda Ardern (88% saying 'a lot' or 'some' confidence). The Australian leaders follow, with Prime Minister Scott Morrison (58%) and former Opposition Leader Bill Shorten (52%). Eighteen points behind is Indonesian President Joko Widodo (34%), followed by US President Trump and Myanmar's Aung San Suu Kyi (both 25%). This means President Trump is only ahead of Russia's Vladimir Putin (21%) and North Korea's Kim Jong-un (7%).

China

A majority of Australians (74%) say Australia is too economically dependent on China. A sizeable 68% say the Australian government is allowing too much investment from China. More than three-quarters of the population say 'Australia should do more to resist China's military activities in our region, even if this affects our economic relationship' (77%, an increase of 11 points since 2015) and believe that 'China's infrastructure investment projects across Asia are part of China's plans for regional domination' (79%). Only 44% say China's infrastructure investment projects are good for the region.

A majority of Australians (60%) would support the Australian military conducting freedom of navigation operations in the South China Sea and other disputed areas claimed by China. However, only 43% of Australians are in favour of the Australian

military becoming involved if China invaded Taiwan and the United States decided to intervene. Almost two-thirds of Australians (62%) would not support using the Australian military if China initiated a military conflict over disputed islands or territories. Only a quarter of Australians (27%) agree that Australia is doing enough to pressure China to improve human rights.

US alliance

Almost three-quarters of Australians (72%) say Australia's alliance with the United States is either 'very' or 'fairly' important for Australia's security, a four-point drop from 2018. A clear majority (73% each) agree the US alliance is a natural extension of our shared values and ideals and that the United States would come to Australia's defence if Australia was under threat. A majority of Australians (56%) say the alliance relationship with the United States makes Australia safer from attack or pressure from China.

However, almost half (46%) agree the United States is 'in decline relative to China and so the alliance is of decreasing importance', a five-point increase from 2011. A sizeable majority of Australians (69%) say that 'Australia's alliance with the United States makes it more likely Australia will be drawn into a war in Asia that would not be in Australia's interests'. Two-thirds (66%) agree that Donald Trump has weakened Australia's alliance with the United States.

Australia's best friend in the world

A majority of Australians (59%) say New Zealand is our best friend in the world, followed by the United States (20%) and the United Kingdom (15%). Only 4% say China is our best friend, which has halved since 2017. Only 2% see Japan and 1% see Indonesia as Australia's best friend in the world.

Threats to Australia

Climate change tops the list of potential threats to Australia's vital interests over the next ten years, with 64% of Australians saying it is 'a critical threat'. Australians have similarly high levels of concern about cyberattacks from other countries (62% saying critical threat), international terrorism (61%) and North Korea's nuclear program (60%).

A majority of Australians (55%) say that 'if China opened a military base in a Pacific Island country', this would be a critical threat to the nation's vital interests. Concern about foreign interference in Australian politics has increased, with almost half of the population (49%, an eight-point increase from 2018) seeing it as a critical threat.

Use of military force

A strong majority of Australians (80%) say they would support the use of the Australian military to 'stop a government from committing genocide and killing large numbers of its own

people'. More than three-quarters (77%) would support the Australian military restoring 'law and order in a Pacific nation'.

Half the population (50%) say Australian military forces should be used 'to fight against violent extremist groups in Iraq and Syria', an 11-point fall from 2017. However, 63% say they are in favour of the use of Australian military forces to 'fight against violent extremist groups in Southeast Asia'.

Foreign technology

When asked about priorities for government in deciding which foreign companies should be allowed to supply new technology for important services in Australia, almost half (44%) of the population say the first priority for the Australian government should be 'protecting Australians from foreign state intrusion'. Significantly fewer (28% each) believe the government's first priority should be 'bringing the most sophisticated technology to Australia' or 'keeping prices down for Australian consumers'.

Climate change and global warming

Six in ten Australians (61%) say 'global warming is a serious and pressing problem', about which 'we should begin taking steps now even if this involves significant costs'. This is a 25-point increase since 2012, equal to 2008 levels of concern.

Almost half of Australians (47%) say that the main priority for the federal government when thinking about energy policy should be 'reducing carbon emissions'. Fewer (38%) say that 'reducing household bills' should be the main priority and only 15% nominate 'reducing the risk of power blackouts' as the main priority.

Immigration

Fewer than half of Australians (47%, down seven points from 2018) say that the total number of migrants coming to Australia each year is 'too high'. This level remains higher (by ten points) than in 2014. Almost three-quarters (71%) of Australians say 'Australian cities are already too crowded'. A majority of Australians (67%) agree that 'overall, immigration has a positive impact on the economy'. The population is divided on the question of whether 'immigrants are a burden on our social welfare system' (48% agreeing, 50% disagreeing).

Economic outlook, free trade and globalisation

A majority of Australians (65%) are either optimistic or very optimistic about Australia's economic performance in the world over the next five years, although this is nine points lower than in 2017.

Three-quarters of Australians (75%) say free trade is 'good for [their] own standard of living', up eight points since 2017, and 71% agree free trade is good for the Australian economy. A majority say free trade is good for Australian companies (65%)

and creating jobs in Australia (61%, up six points from 2017). While 72% of Australians say globalisation is 'mostly good' for Australia, this has fallen six points from 2017 in a return to 2008 levels.

Democracy

Support for democracy is stable, with 65% of Australians saying 'democracy is preferable to any other kind of government'. One in five (22%) say that 'in some circumstances, a non-democratic government can be preferable', while 12% say that 'for someone like me, it doesn't matter what kind of government we have'. A strong majority of Australians (70%) are 'very' or 'fairly' satisfied with the way democracy works in Australia.

Indonesia

Only 34% of Australians agree that 'Indonesia is a democracy'. A majority of Australians (61%, up nine points from 2018) say 'Australia is managing its relationship with Indonesia well'. As in past years of polling, most Australians agree that Indonesia is an important economy to Australia (62%). However, only around a third of Australians (37%) say the Indonesian government has worked hard to fight terrorism.

Pacific Islands

Australians are split about some aspects of the government's Pacific step-up. Seven in ten Australians (73%) agree that 'Australia should try to prevent China from increasing its influence in the Pacific'. A majority (54%) also agree that 'Australia should partner with Papua New Guinea and the United States in redeveloping a joint military base on Manus Island'. However, 49% agree and 48% disagree that 'Australia should spend more than it currently does on helping the Pacific'.

Feelings thermometer

Australians hold very warm feelings towards New Zealand, which tops the feelings thermometer at 86°. The United Kingdom remains in high regard at 76°, although it is down six points from 2018. The United States has dropped four degrees to 63°. Australians' feelings towards China have cooled nine degrees to 49°. Russia (43°), Saudi Arabia (34°) and North Korea (25°) are again on the cooler side of the thermometer.

The 2019 Lowy Institute Poll reports the results of a nationally representative online and telephone survey conducted on behalf of the Lowy Institute by the Social Research Centre between 12 and 25 March 2019 with a sample size of 2130 Australian adults. On a simple random sample of 2130 responses, the margin of error is approximately 2.1%. Where a complex sample is used, the 'design effect' measures the additional variance in comparison with a simple random sample. The design effect for this survey is estimated at 2.40.

AUSTRALIA AND THE WORLD

Relations with major powers

Australia's relationships with the world's two largest economies – China and the United States – have been a subject of fierce debate since China became Australia's largest trading partner in 2007.

In 2019, Australians' trust in China to 'act responsibly in the world' has fallen to its lowest level in the history of Lowy Institute polling. Only 32% of Australians say they trust China either 'a great deal' or 'somewhat' to act responsibly, a 20-point fall from 2018 and 15 points lower than the previous low of 47% recorded in 2008.

Trust in the United States, on the other hand, is relatively unchanged from last year but on a downward trajectory since 2011. A majority of Australians (52%) say they trust the United States either 'a great deal' or 'somewhat' to act responsibly in the world. However, this is the lowest level of trust in the United States recorded since we first asked this question in 2006, and 31 points lower than it was in 2009 (83%).

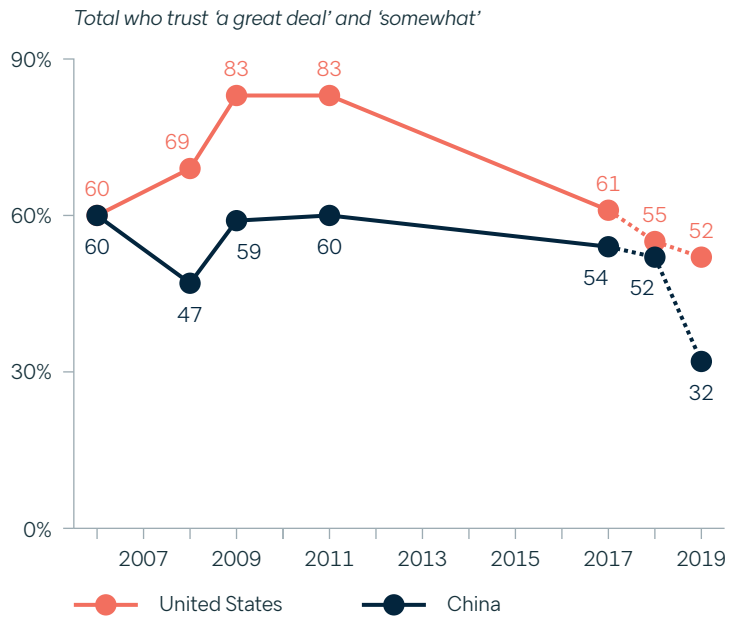
This issue of trust may have influenced the priority Australians place on the relationship with the United States. Asked about their priorities between China and the United States, more Australians in 2019 incline towards our traditional ally, the United States. Half (50%) agree that 'the Australian government should put a higher priority on maintaining strong relations with the United States, even if this might harm our relations with China'. However, a sizeable minority (44%) say Australia should 'put a higher priority on building stronger relations with China, even if this might harm our relations with the United States'.

Trust in China has fallen to its lowest level in the history of Lowy Institute polling

FIGURE 1

Trust in major powers

How much do you trust the following countries to act responsibly in the world?

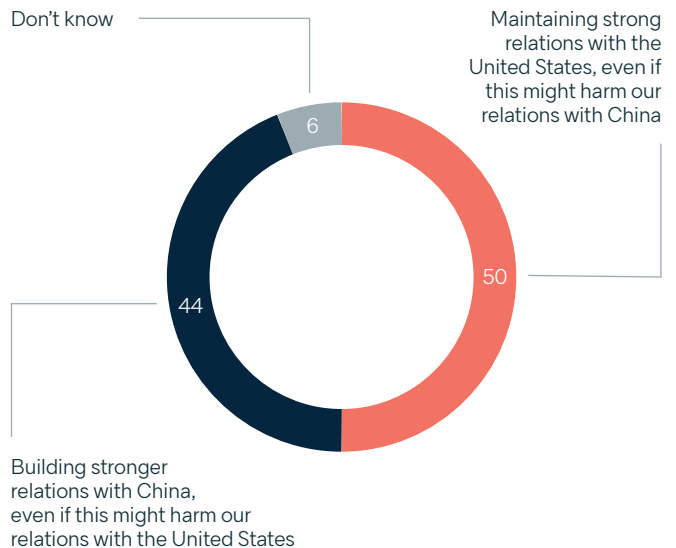


Dotted line indicates change in mode: see Methodology, p.38.

FIGURE 2

Major power relations

Now thinking about Australian foreign policy, do you think the Australian government should put a higher priority on:



Confidence in world leaders

The decline in trust in China corresponds with falling levels of confidence in Chinese President Xi Jinping. Only 30% of Australians have ‘a lot’ or ‘some’ confidence in President Xi to do the right thing in world affairs, a 13-point drop since 2018 (43%).

Almost 9 in 10 are confident that Prime Minister Jacinda Ardern will do the right thing in world affairs

However, confidence in President Xi is still higher than in US President Donald Trump. Only 25% of Australians (down from 30% in 2018) have either ‘a lot’ or ‘some’ confidence in President Trump ‘to do the right thing regarding world affairs’, compared with 30% saying the same for President Xi. Among the 223 younger respondents (aged 18–29 years), none (0%) expressed ‘a lot of confidence’ in President Trump, and 66% of that age group said they had ‘no confidence at all’ in the US President. More than half of adult women (52%) have ‘no confidence at all’ in President Trump, compared with 39% of adult men.

New Zealand’s Prime Minister Jacinda Ardern tops this list of global leaders, with 88% of Australians expressing confidence in her to do the right thing in world affairs. While Australians tend to regard New Zealand and its leaders warmly, it should be noted that the Christchurch massacre took place during the fieldwork for the 2019 Poll.

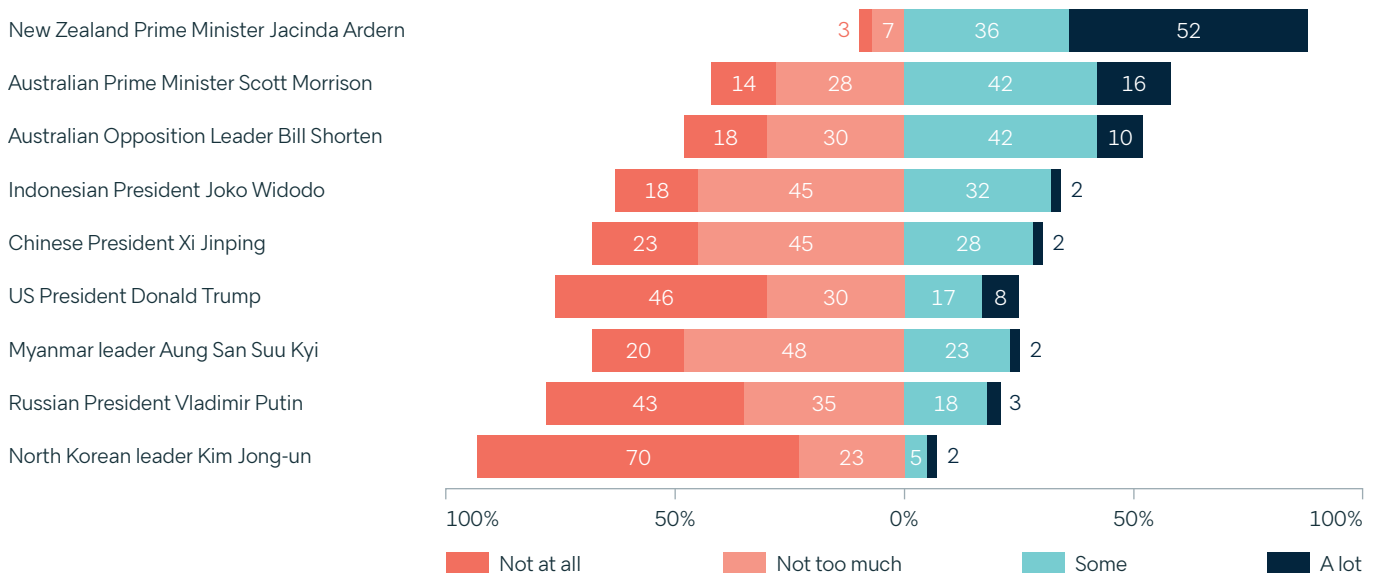
The next ranked leaders are Australians – with 58% of respondents expressing confidence in Prime Minister Scott Morrison and 52% in then Opposition Leader Bill Shorten. In 2018, a higher proportion (63%) of Australians said they had confidence in former Prime Minister Malcolm Turnbull to do the right thing in world affairs.

Australians are more wary of Indonesian President Joko Widodo, with a third (34%) expressing confidence in him. Even fewer Australians (25%) express confidence in Myanmar leader Aung San Suu Kyi. Only one in five Australians (21%) have confidence in Russian President Vladimir Putin and 7% in North Korean leader Kim Jong-un, in results statistically unchanged from 2018.

FIGURE 3

Confidence in world leaders

Here is a list of political leaders. For each, please indicate how much confidence you have in each leader to do the right thing regarding world affairs – a lot of confidence, some confidence, not too much confidence or no confidence at all.



China

Over the past 15 years of Lowy Institute polling, Australians have expressed a complex range of attitudes towards China. Australians' views about China's economy, culture and people have generally been positive. And discussion about China – Australia's largest trading partner – has often focused on the economic benefits of the bilateral relationship. On the other hand, issues such as Chinese investment, China's human rights record and its system of government elicit strongly negative views.

Australian sentiment towards China has been generally stable and on the warm side, with China registering 58° in the 2018 Lowy Institute 'feelings thermometer', a reading statistically equivalent to those recorded over the past five years. However, in 2019, public opinion appears to have shifted.

Australians' trust in China has declined dramatically to 32% in 2019 (down 20 points from last year, see page 6). And feelings towards our largest trading partner have cooled, down nine degrees to 49°, in the single largest fall in the 15 years of Lowy Institute polling.

Nearly three-quarters of Australians (74%) agree that 'Australia is too economically dependent on China', even though a majority (55%) agreed in 2018 that China was 'the world's leading economic power'.

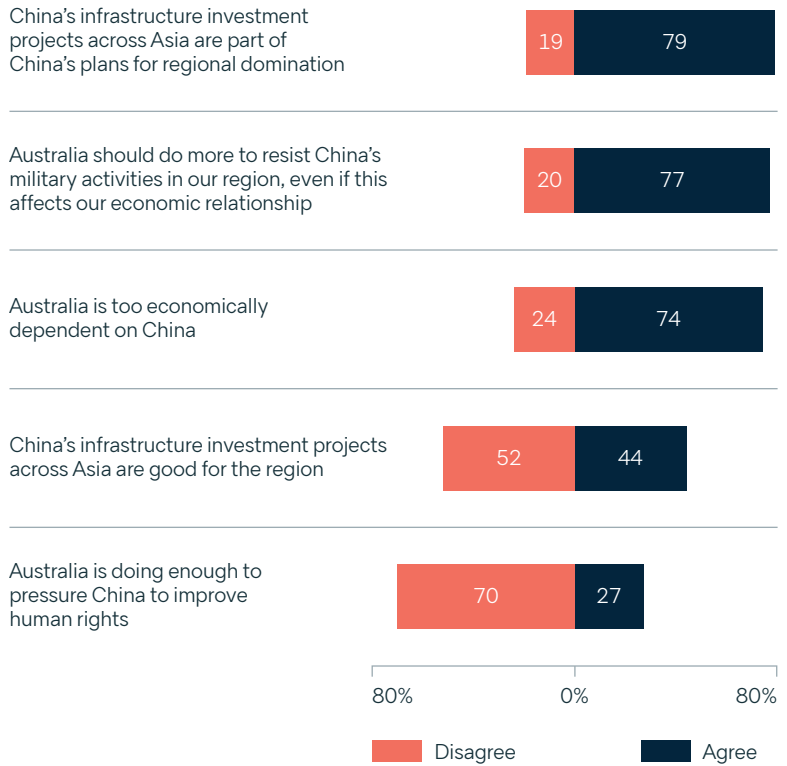
An important factor in this cooling towards China may be the continuing debate about foreign influence and China's alleged interference in Australian politics. In 2018, that debate appeared to have gained little traction in the broader population. However, almost half (49%) in 2019 say that foreign interference in Australian politics is 'a critical threat' to Australia's vital interests, an increase of eight points from last year.

Other factors may include political disagreement about China's signature infrastructure plan, the Belt and Road Initiative, and the militarisation of the South China Sea. More than three-quarters of the population agree that 'Australia should do more to

FIGURE 4

Attitudes towards China

Now a few more questions about China. Please indicate whether you personally agree or disagree with each of the following statements:



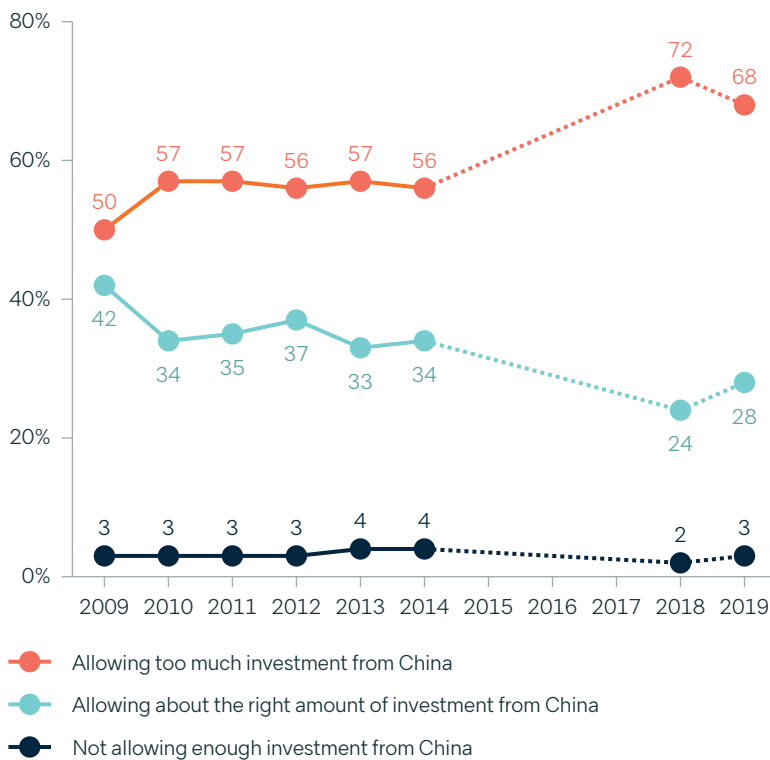
74% say Australia is too economically dependent on China

A majority of Australians say a Chinese military base in the Pacific would be a critical threat to Australia's vital interests

FIGURE 5

Chinese investment

And now about Chinese investment in Australia. Overall, do you think the Australian government is:



Dotted line indicates change in mode: see Methodology, p.38.

resist China's military activities in our region, even if this affects our economic relationship¹ (77%, an increase of 11 points since 2015) and believe that 'China's infrastructure investment projects across Asia are part of China's plans for regional domination' (79%). Only 44% say that China's infrastructure investment projects are good for the region.

Last year, it was reported that China had approached Vanuatu about building a permanent military presence in the South Pacific.² A majority of Australians (55%) say that 'if China opened a military base in a Pacific Island country' this would be 'a critical threat' to Australia's vital interests.

A majority (60%) would support the Australian military conducting freedom of navigation naval operations in the South China Sea and other disputed areas claimed by China. This is less support than recorded in response to a similar question in 2016 (74%) and 2017 (68%), when tensions in the South China Sea were a headline issue.³

Australians are more hesitant about the use of Australian military forces in other potential conflicts with China. Only 43% of Australians are in favour of the Australian military becoming involved 'if China invaded Taiwan and the US decided to intervene'. Almost two-thirds of Australians (62%) would not support the use of the Australian military 'if China initiated a military conflict with one of its neighbours over disputed islands or territories'.

Scepticism about foreign investment from China persists. The proportion of Australians (68%) who say that the Australian government is 'allowing too much investment from China' has remained statistically equal to the high point (72%) in 2018. In the past, Lowy Institute polling has found most Australians are wary of foreign investment in agriculture, residential real estate and critical infrastructure such as ports and airports.⁴

Australians' cooler attitudes towards China may also be affected by increased attention on the human rights situation in China, and particularly in Xinjiang, since Xi Jinping took office in 2012. Only a quarter (27%) of Australians agree that 'Australia is doing enough to pressure China to improve human rights', a decrease of nine points since 2011.

The US alliance

Over the history of the Lowy Institute Poll, Australians have consistently expressed support for the US alliance. In 2011 and 2015, a large majority agreed that ‘Australians and Americans share many common values and ideals [and] a strong alliance is a natural extension of this’. The 2019 results reinforce these findings, with 73% (a marginal four-point drop since 2015) saying that the US alliance is a natural extension of our shared values and ideals. The same number (73%) agree the ‘United States would come to Australia’s defence if Australia was under threat’.

However, low levels of confidence in US President Donald Trump may have had some impact on Australian support for the alliance. Most (72%) of the population still say the US alliance is either ‘very’ or ‘fairly’ important for Australia’s security, a four-point drop from 2018. This result remains nine points higher than the low point of 63% in 2007, during the presidency of George W Bush. However, the proportion of Australians saying the alliance is

‘very important’ has dropped ten points to 38%, while the number of those who say it is ‘fairly important’ has increased six points to 34%.

A majority of Australians (56%) say that the alliance relationship with the United States makes Australia safer from attack or pressure from China, a result which is unchanged from 2011.

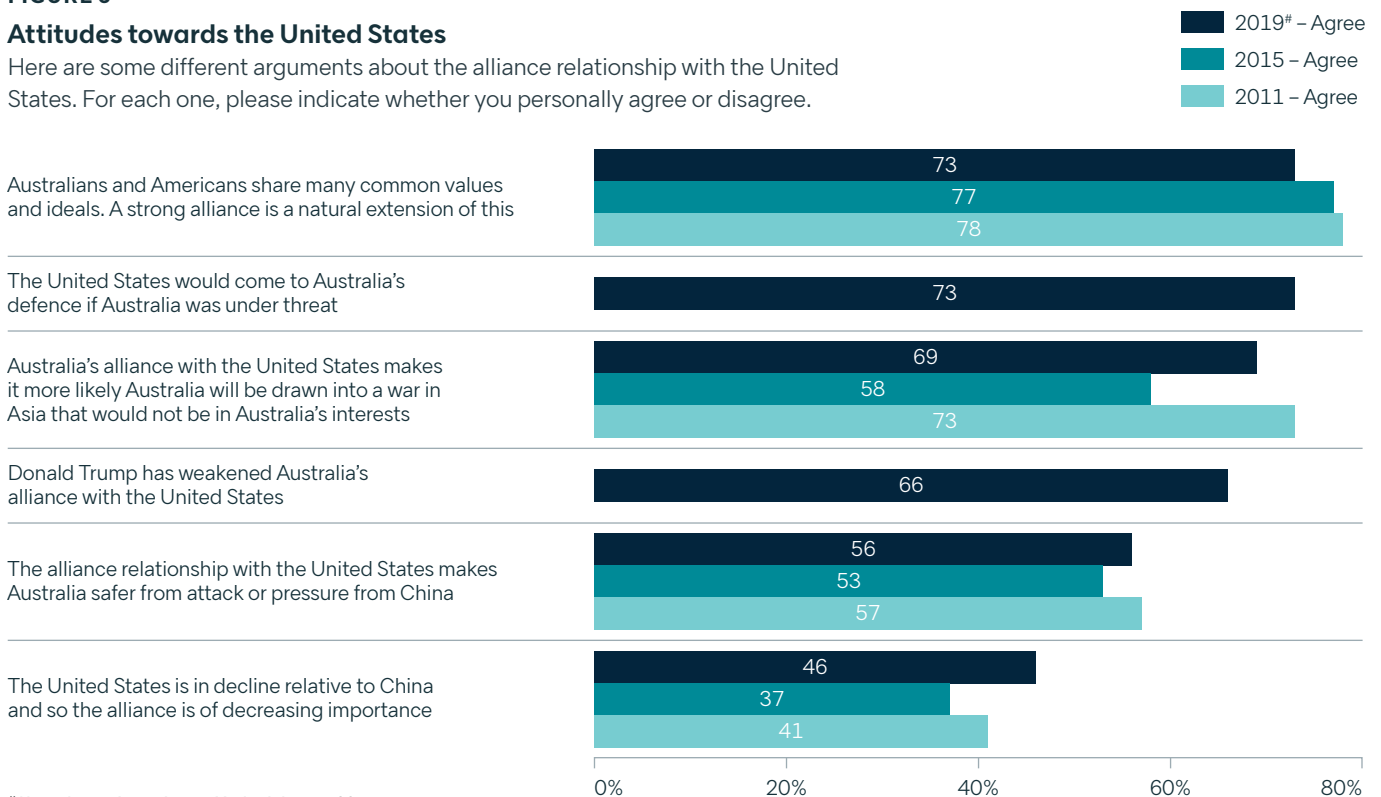
Still, Australians may be wary of the potential costs of the alliance as China’s role shifts in our region. Almost half (46%) agree that the United States is ‘in decline relative to China and so the alliance is of decreasing importance’, a five-point increase from 2011. A sizeable majority of Australians (69%) say that ‘Australia’s alliance with the United States makes it more likely Australia will be drawn into a war in Asia that would not be in Australia’s interests’, an increase of 11 points from 2015 but not as high as the peak of that sentiment in 2011 (73%). A clear majority (66%) agree that Donald Trump has weakened Australia’s alliance with the United States, and young Australians (aged 18–29 years) in particular hold this view (78%).

73% say the United States would come to Australia’s defence if it were under threat

FIGURE 6

Attitudes towards the United States

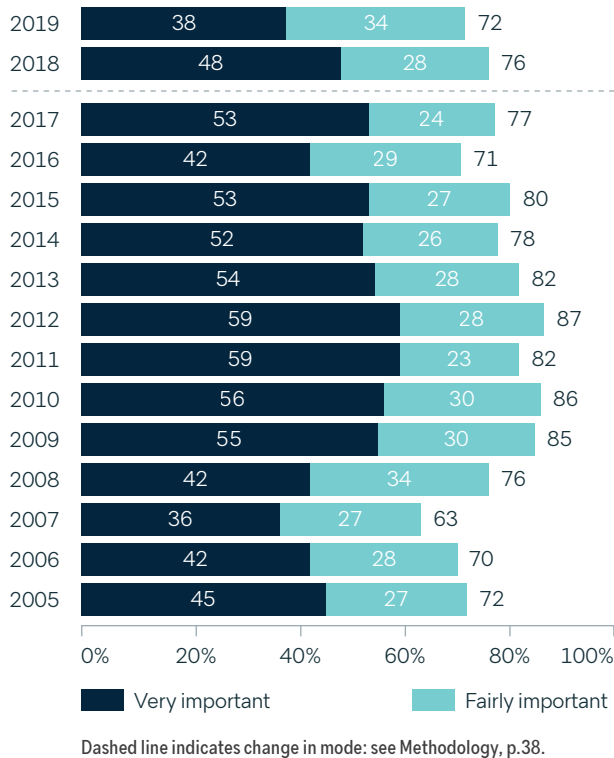
Here are some different arguments about the alliance relationship with the United States. For each one, please indicate whether you personally agree or disagree.



Note change in mode: see Methodology, p.38.

FIGURE 7
Importance of the US alliance

And now about Australia's alliance relationship with the United States. How important is our alliance relationship with the United States for Australia's security?



Australia's best friend in the world

A majority of Australians (59%) select New Zealand as our best friend in the world, an increase of six points from 2017 and up 27 points from 2014.

After losing ground in 2017, the United States has rebounded and 20% say it is Australia's best friend. This remains 15 points lower than in 2014 (35%). The United Kingdom ranks third in 2019, with only 15% saying the United Kingdom is our best friend.

Australians may view our relationship with our largest trading partner, China, as of a similar priority to the United States, but only 4% say China is our best friend. This number has halved since 2017. The number of Australians saying the United States is our best friend is now five times higher than the number nominating China. Only 2% see Japan and 1% see Indonesia as Australia's best friend.

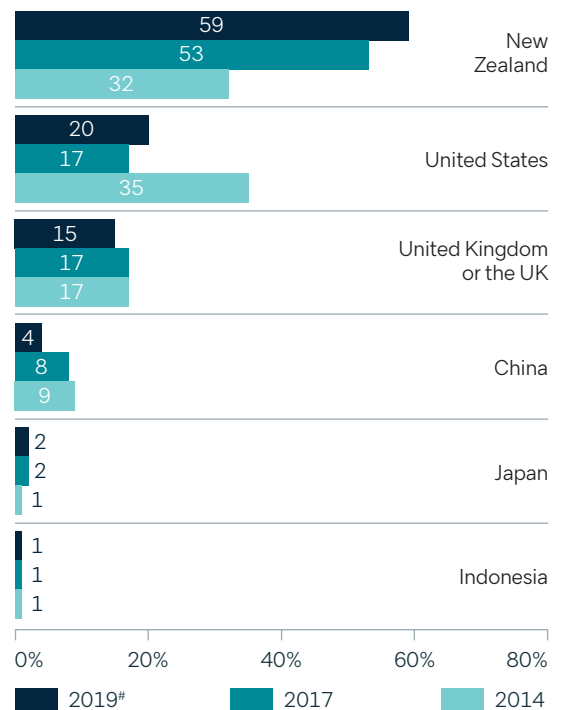
Australian views of the United Kingdom may have been affected by Brexit, and the adverse coverage of the protracted Brexit negotiations. Seven in ten Australians (70%) say that the United Kingdom leaving the European Union will be a bad thing for the European Union. The majority (62%) say it will be a bad thing for the United Kingdom. Fewer, but still a majority (58%), say Brexit will be a bad thing for the West.

Pessimism about Brexit aligns with Lowy Institute polling from 2016, in which a majority of Australians (51%) said that the United Kingdom 'should remain a member of the European Union'. Only 19% said it should leave.⁵

Brexit may also have affected sentiment towards the United Kingdom more generally, with the Lowy Institute feelings thermometer registering a six-point fall for the United Kingdom since 2018 (to 76°). Feelings towards the European Union have remained steady at 66°.

FIGURE 8
Australia's best friend in the world

Now about Australia's relations with other countries around the world. In your personal opinion, which one of the following countries is Australia's best friend?



* Note change in mode: see Methodology, p.38.

Threats to Australia

Over the past 15 years, Lowy Institute polling has sought Australians' views on a range of possible threats to 'the vital interests of Australia in the next ten years', including terrorism, the nuclear threat from unfriendly countries, immigration, fake news and China's growing power.

For the first time in the history of the Poll, climate change topped the list of threats to Australia's vital interests in 2019, alongside cyberattacks, international terrorism and North Korea's nuclear program. The number of Australians saying climate change is a critical threat (64%) has increased by six points since last year (and 18 points since 2014). Younger Australians are more concerned about climate change: 83% of 18–29 year olds say that climate change is a critical threat compared with 59% of those aged over 30.

The potential threat of cyberattacks has been a growing concern since 2014. The proportion of Australians who see cyberattacks as a critical threat to Australia's vital interests has risen five points this year to 62%, an increase of 11 points since 2014. International terrorism (61%) and North Korea's nuclear program (60%) continue to be of significant concern, although slightly more Australians saw these threats as critical in 2018. A majority (55%) see 'China open[ing] a military base in a Pacific Island country' as a critical threat (see page 9). The prospect of a global economic downturn continues to cause concern, with 51% seeing it as a critical threat, a result unchanged from 2018.

Concern about foreign interference in Australian politics has increased, with 49% saying it is a critical threat, up eight points from 2018. A minority (43%) say 'frequent changes in Australia's political leadership' is a critical threat.

Lower ranked are the threats posed by foreign investment in Australia (39% saying 'critical threat') and 'large numbers of immigrants and refugees coming to Australia' (36%, unchanged from 2018).

Support is declining for the Australian military to combat terrorism in the Middle East

Along with climate change, many of these threats are perceived quite differently by younger Australians. Only 11% of 18–29-year-old Australians see large numbers of immigrants and refugees as a critical threat, compared with 42% of those aged over 30. Similarly, international terrorism is less of a concern for younger Australians, with only 42% of 18–29 year olds compared with 66% of those over 30 seeing it as a critical threat. The same generational difference exists for cyberattacks (47:66), North Korea's nuclear program (41:65) and China opening a military base in the Pacific (36:60).

Use of military force

There is declining support for Australia's military involvement in combating terrorism in the Middle East, which may reflect some disillusionment about the course of military conflicts in Iraq, Afghanistan and Syria. In an 11-point fall from 2017, 50% of Australians support using Australian military forces 'to fight against violent extremist groups in Iraq and Syria'. More Australians support military action against violent extremism when it is closer to home: 63% say they are in favour of using Australian military forces to 'fight against violent extremist groups in Southeast Asia'.

The threat of genocide continues to provoke a strong response, with 80% of Australians saying they would support the use of Australian military forces to 'stop a government from committing genocide and killing large numbers of its own people'. There are similarly high levels of support for the Australian military 'to restore law and order in a Pacific nation' (77%).

A majority of Australians (60%) would support the Australian military conducting freedom of navigation naval operations in the South China Sea and other disputed areas claimed by China. Only 43%, however, would support Australian military involvement if China invaded Taiwan and the United States decided to intervene. Even fewer (34%) are in favour of using Australian military forces if China initiated a military conflict with one of its neighbours over disputed islands or territories (see page 9).

Climate change ranks at the top of a list of ten possible threats to Australia's vital interests

FIGURE 9

Threats to vital interests

Here is a list of possible threats to the vital interests of Australia in the next ten years. For each one, please select whether you see this as a critical threat, an important but not critical threat, or not an important threat at all.

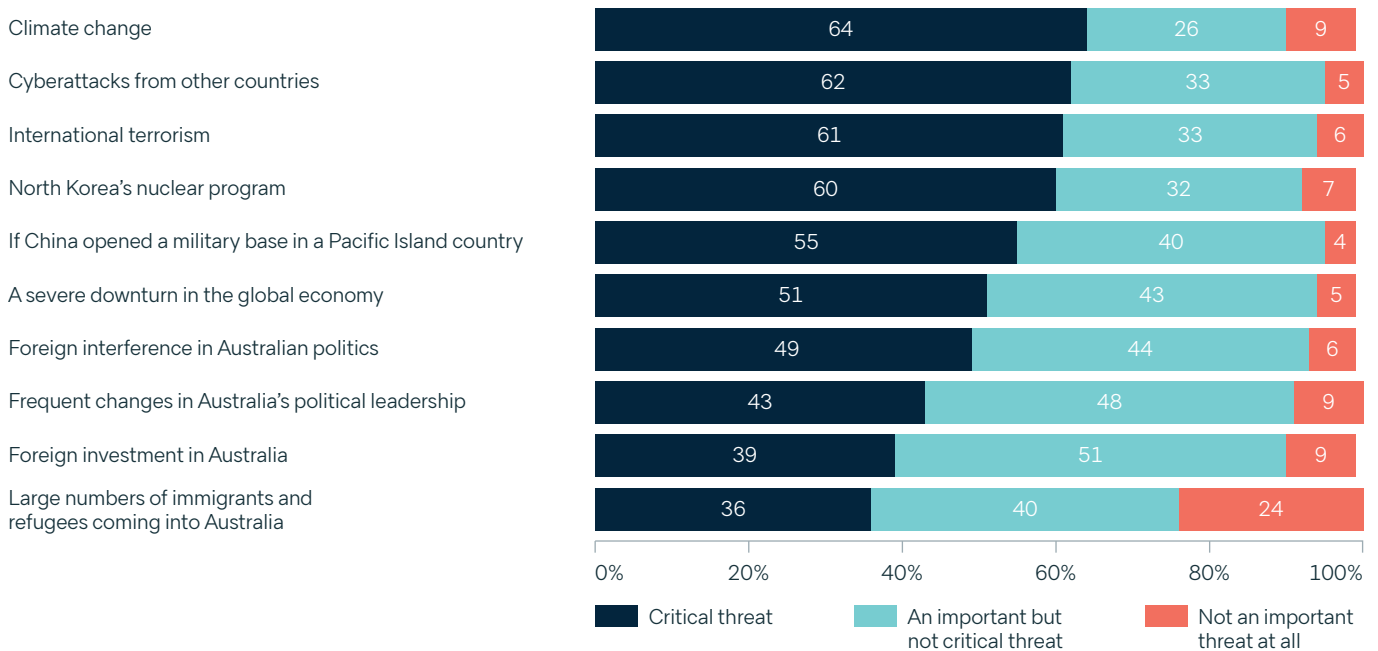
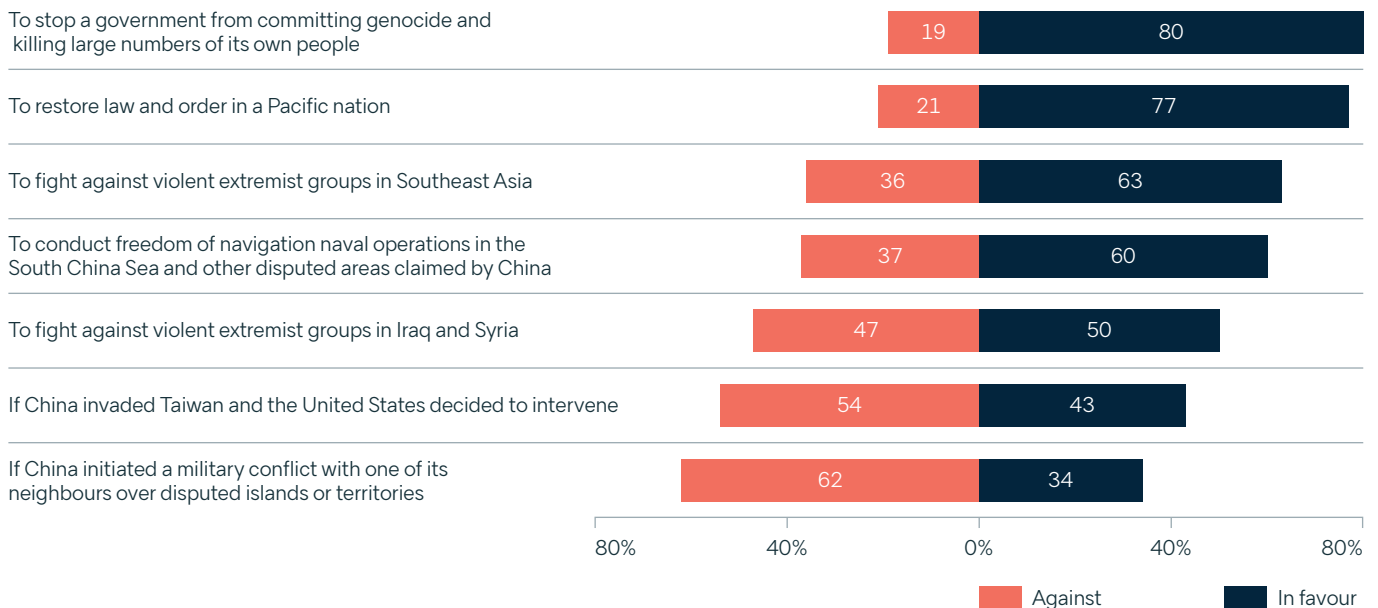


FIGURE 10

Use of Australian military forces

Now about Australian military forces. There has been some discussion about the circumstances that might justify using Australian military forces in other parts of the world. Please give your opinion about the following situations. Would you personally be in favour or against the use of Australian military forces:



Foreign technology

On 23 August 2018, the Australian government announced a decision that effectively banned Chinese companies Huawei and ZTE from building Australia’s 5G infrastructure, citing national security concerns.⁶ That decision appears to have gained the backing of many Australians. On the implications of foreign involvement in Australian infrastructure, almost half (44%) of the population say that the first priority for the Australian government should be ‘protecting Australians from foreign state intrusion’ when considering ‘which foreign companies should be allowed to supply new technology for important services in Australia’. Significantly fewer (28% each) believe the government’s first priority should be ‘bringing the most sophisticated technology to Australia’ or ‘keeping prices down for Australian consumers’.

More Australians want new technology to be protected from foreign state intrusion, rather than lower prices or more sophisticated technology

Climate change and global warming

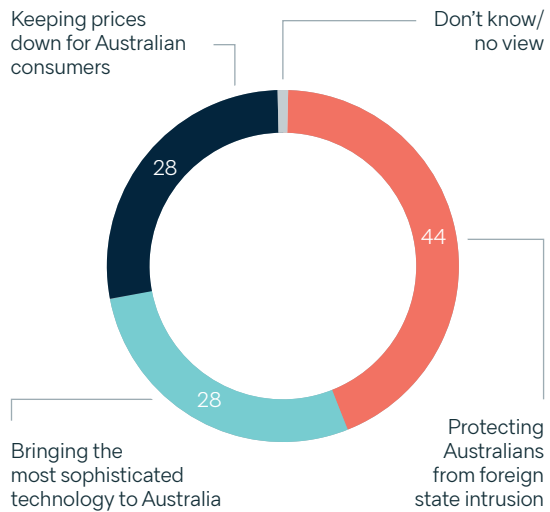
The past seven years have seen a dramatic reversal in Australian attitudes about climate change. In 2019, six in ten Australians (61%) say ‘global warming is a serious and pressing problem’, about which ‘we should begin taking steps now even if this involves significant costs’. This is a 25-point increase since 2012, and equals 2008 levels of concern. The peak of concern was recorded in 2006, when 68% of Australians expressed this view.

This rising concern aligns with climate change ranking at the top of the list of possible threats to Australia’s vital interests for the first time in 2019

FIGURE 11

Technology and foreign companies

Now a question about new technology. When considering which foreign companies should be allowed to supply new technology for important services in Australia, which one of the following should be the first priority for the Australian government in your view?



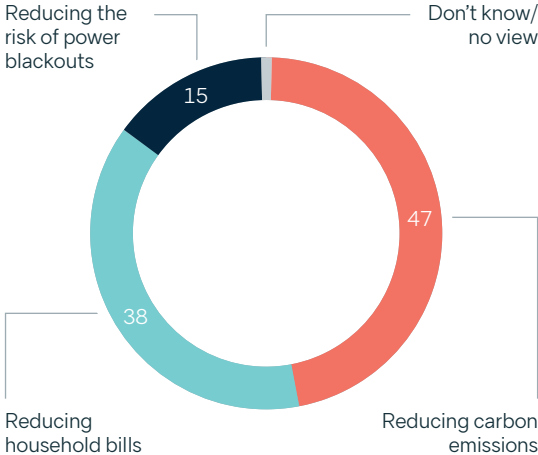
(see page 12). A majority of Australian adults (64%) see climate change as ‘a critical threat’, an increase of six points from 2018 and 18 points since 2014.

There are generational differences on this issue. Three-quarters of Australians aged 18–44 (76%) say that global warming is a ‘serious and pressing problem [and] we should begin taking steps now even if this involves significant costs’, compared with around half (49%) of Australians aged over 45. About the same proportion of this older group (52%) see climate change as a critical threat to Australia’s vital interests.

Energy price rises and unreliable electricity supply are frequently cited as reasons for resistance to measures such as carbon pricing or increased use of renewable energy. However, the threat posed by climate change appears to be a greater priority for Australians than either reducing household bills or power blackouts. Despite fierce debate about renewables and political disagreement about the now-abandoned National Energy Guarantee policy, almost half of Australians (47%) say that the main priority for the federal government when thinking about energy policy should be 'reducing carbon emissions'. Fewer (38%) say that 'reducing household bills' should be the main priority and only 15% nominate 'reducing the risk of power blackouts' as the main priority. Again, there are significant differences between the generations on this question: 62% of 18–44 year olds prioritise reducing emissions, compared with 33% of Australians over the age of 45.

FIGURE 13
Energy policy priorities

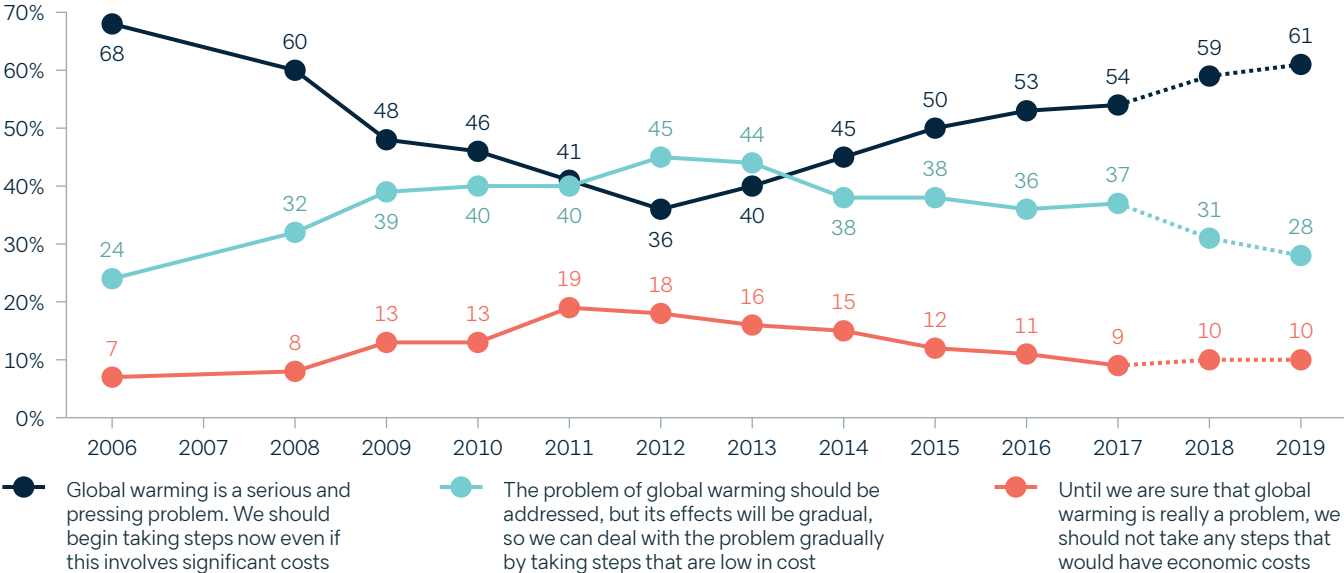
Now thinking about energy policy, which one of the following goals do you personally think should be the main priority for the federal government?



Almost half the country wants the government to prioritise lower carbon emissions over reducing energy prices and power blackouts

FIGURE 12
Climate change and global warming

Now about global warming. There is a controversy over what the countries of the world, including Australia, should do about the problem of global warming. Please indicate which of the following three statements comes closest to your own point of view.



Dotted line indicates change in mode: see Methodology, p.38.

Immigration

Concerns about the rate of immigration to Australia appear to have softened somewhat in 2019. After a sharp spike in 2018, fewer than half of Australians this year (47%, down seven points) say that the total number of migrants coming to Australia each year is ‘too high’. However, this level remains ten points higher than in 2014.

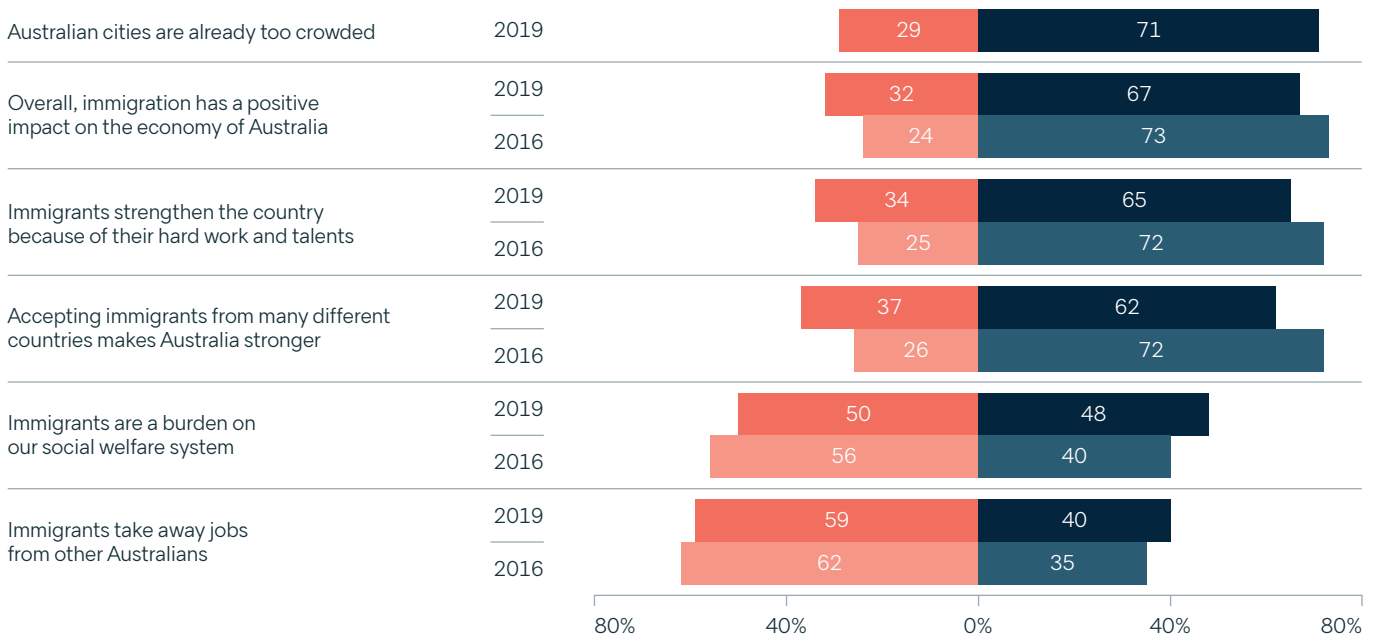
When considering the pros and cons of immigration more generally, a majority of Australians remain positive, but the balance of attitudes appears to be shifting. In 2019, 67% agree that ‘overall, immigration has a positive impact on the economy’, 65% say that ‘immigrants strengthen the country because of their hard work and talents’, and 62% agree that ‘accepting immigrants from many different countries makes Australia stronger’. However, each of these results is lower than in 2016 (six points, seven points and ten points, respectively).

The pressure on cities and infrastructure may be driving this shift in attitudes in 2019, with almost three-quarters (71%) of Australians saying that ‘Australian cities are already too crowded’. However, a majority of Australians (59%) reject the idea that ‘immigrants take away jobs from other Australians’, although fewer disagreed than in 2016. The population is divided on the question of whether ‘immigrants are a burden on our social welfare system’ (48% agreeing, 50% disagreeing).

Younger Australians seem to be more positive about the benefits of immigration. Three-quarters of 18–44 year olds (75%) say that ‘immigration has a positive impact on the economy of Australia’, compared with 59% of Australians over 45 years. There is a similar split on the question of whether ‘immigrants strengthen the country because of their hard work and talents’ (75:55). However, far more older Australians (58% of those aged over 45 compared with 35% of those aged 18–44), see immigrants as ‘a burden on our social welfare system’.

FIGURE 14
Attitudes to immigration

Please indicate whether you personally agree or disagree with each of the following statements about immigration.



Note change in mode in 2019: see Methodology, p.38.

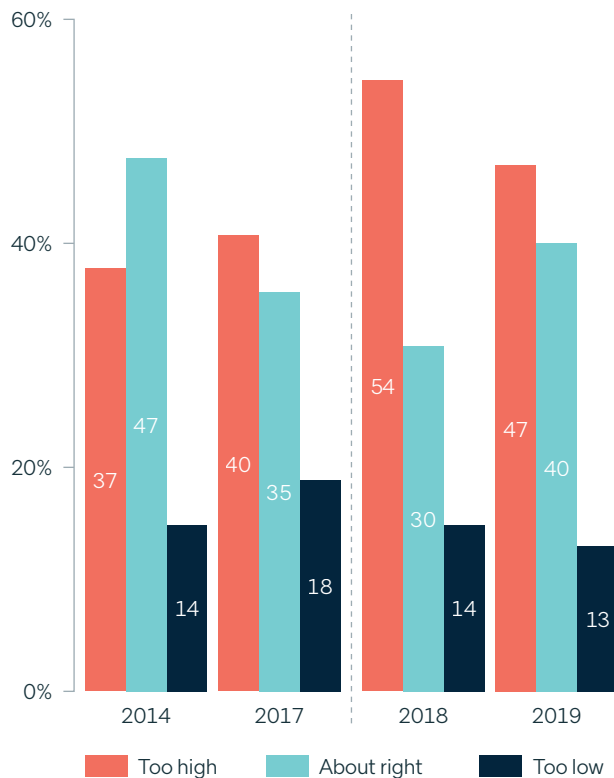
Disagree Agree

71% say Australian cities are already too crowded

FIGURE 15

Immigration rate

Thinking now about Australia’s immigration program. Do you personally think that the total number of migrants coming to Australia each year is too high, too low, or about right?



Dashed line indicates change in mode: see Methodology, p.38.

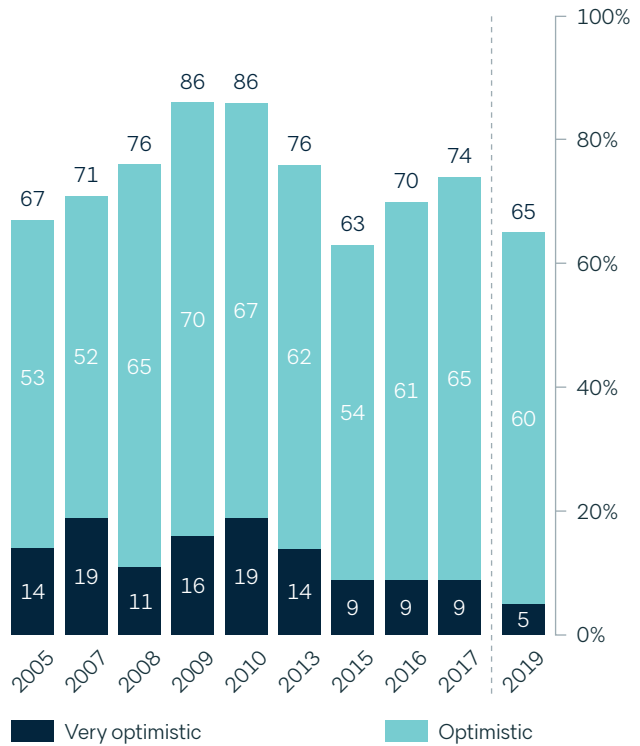
Border protection

Australia’s border protection policies have received international attention in recent years. Australians are quite divided on the impact of these policies on our reputation in the world. More Australians (40%) think Australia’s border protection policies make no difference to its international reputation than those who think it either helps (30%) or hurts (28%) that reputation.

FIGURE 16

Economic optimism

Now about Australia’s economic performance in the world. Overall, how optimistic are you about Australia’s economic performance in the world over the next five years?



Dashed line indicates change in mode: see Methodology, p.38.

Economic outlook

Slow growth, an uncertain global economy, and the protracted trade war between the United States and Australia’s largest trading partner, China, may have had some impact on Australians’ optimism about the national economy. While Australian adults remain generally optimistic about the economy, with a majority (65%) either ‘optimistic’ or ‘very optimistic’ about Australia’s economic performance in the world over the next five years, this has fallen nine points from 2017.

Optimism about Australia’s economy has fallen

FIGURE 17

Free trade

Overall, do you personally think free trade is good or bad for the following:

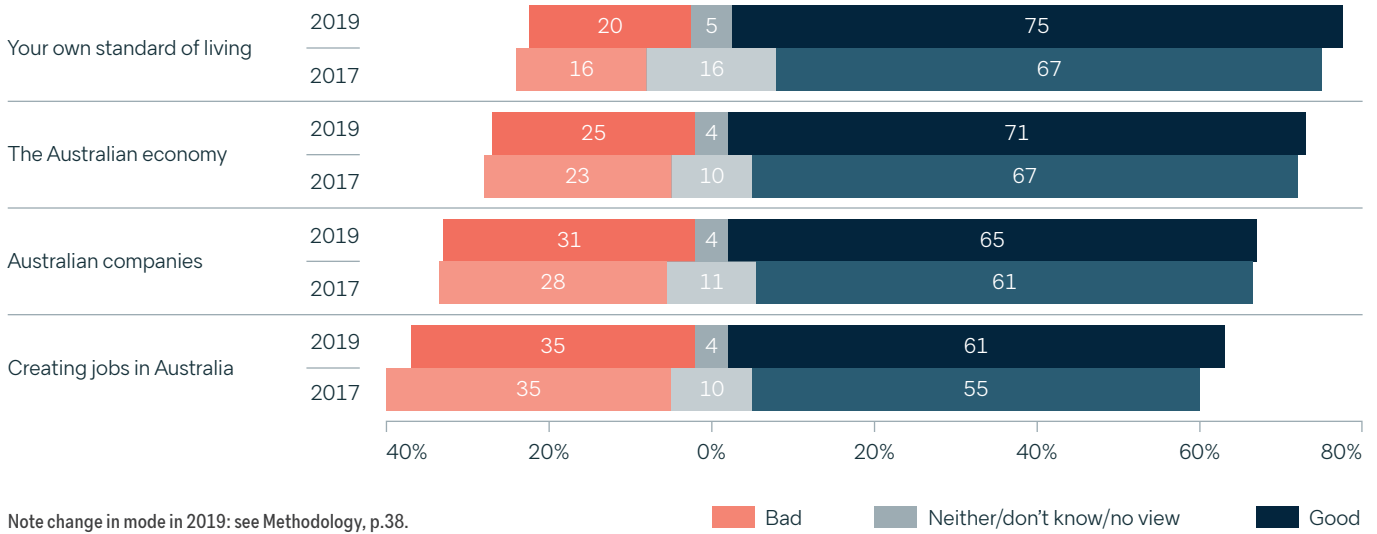
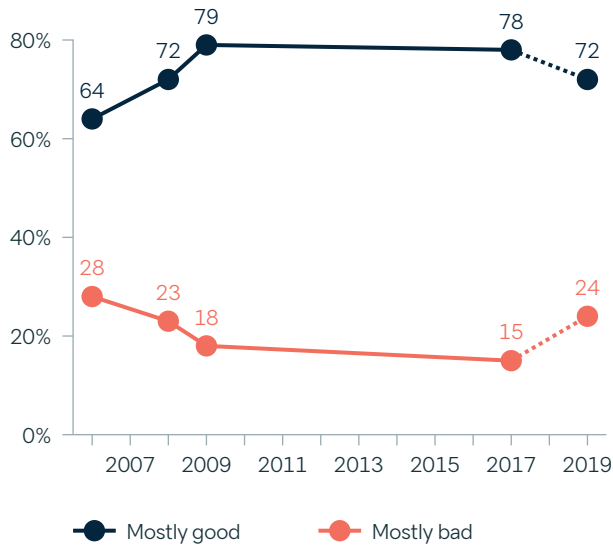


FIGURE 18

Globalisation

Now on globalisation. Do you believe that globalisation, especially the increasing connections of our economy with others around the world, is mostly good or mostly bad for Australia?



Free trade and globalisation

While the public conversation about free trade has soured in a number of comparable countries, Australian support for free trade continues to rise. Three-quarters of Australians (75%, up eight points since 2017) say free trade is good for their own standard of living, and 71% agree free trade is good for the Australian economy. A solid majority say free trade is good for Australian companies (65%) and creating jobs in Australia (61%, up six points).

Australian support for free trade continues to rise

Against these positive attitudes about free trade, globalisation has fallen marginally in favour. In 2019, 72% of Australians say globalisation is 'mostly good', down six points from 2017. This marks a return to 2008 levels, but is still higher than the 64% who gave this response in 2006. Lower income earners are less inclined to favour globalisation, with 67% saying globalisation is 'mostly good', compared with 86% of the highest income earners.

Budget priorities

Government spending on Australia’s foreign policy efforts, such as defence and foreign aid, appears to be a lower priority for most Australians than domestic issues such as health and education. When Australians are asked about the federal budget, there is extensive public support for increased spending on health (81%) and education (74%).

Few say the government should increase spending on border protection (32%), defence (31%) and foreign aid (17%). Almost half (47%) say spending on social welfare should be increased.

Foreign aid is the only policy area in which more Australians say that federal government spending should be decreased rather than increased. Almost half (47%) say they would decrease spending on foreign aid, compared with 17% saying they would increase spending.

FIGURE 19

Budget priorities

Now about the federal budget. If you were making up the budget for the federal government this year, would you personally increase spending, decrease spending or keep spending about the same for:

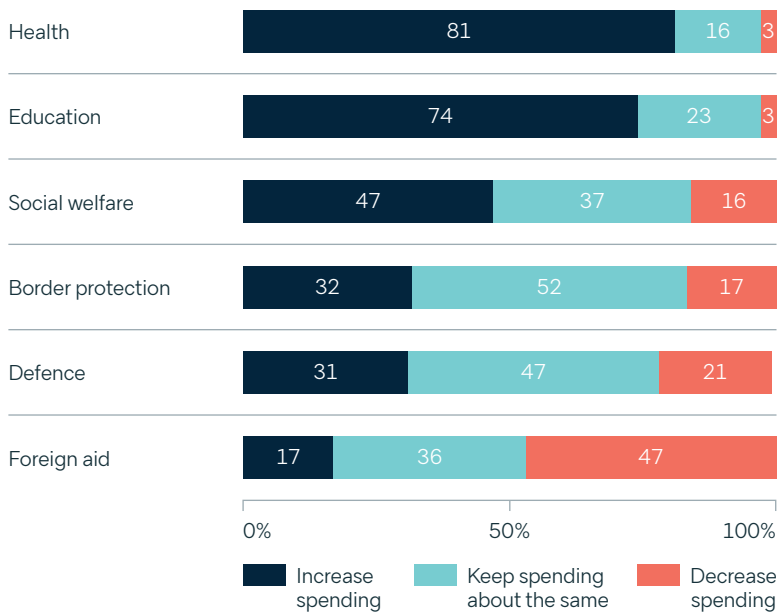


FIGURE 20

Foreign aid and Australia

In your view, does giving foreign aid to other countries help, hurt, or make no difference to:

Australia’s relations with other countries



Australia’s national security



Australia’s economy



0% 50% 100%

Help Make no difference Hurt

Misperceptions about the size of the aid budget may be a factor in these responses. The 2018 Lowy Institute Poll found that on average, Australians think 14% of the budget is spent on aid, but only 10% should be spent on aid. Australia’s aid budget is approximately 0.8% of the federal budget.

Border protection, defence and foreign aid are not high budget priorities for Australians

Despite this general aversion to spending more on aid, most Australians have positive views on the role of aid in Australia’s international relations. A majority (70%) say that giving foreign aid helps Australia’s relations with other countries. They are divided as to whether foreign aid helps or makes no difference to Australia’s national security (44% each). A sizeable minority (39%) say that foreign aid hurts Australia’s economy, while a third (32%) say it makes no difference.

Democracy

The Lowy Institute’s polling on attitudes towards democracy has provoked considerable debate since we first asked Australians for their views in 2012. In 2019, support for democracy is stable, with 65% of Australians saying that ‘democracy is preferable to any other kind of government’. One in five (22%) say that ‘in some circumstances, a non-democratic government can be preferable’, while 12% say that ‘for someone like me, it doesn’t matter what kind of government we have’.

In 2019, the Lowy Institute asked for the first time how satisfied Australians were with democracy, a question that has been asked by the Australian Election Study (AES) since 1969.⁷ The AES has reported falling levels of satisfaction with democracy since 2007. Despite having had five prime ministers in six years, the Lowy Institute Poll this year finds that 70% of Australians are satisfied with the way democracy works in Australia.

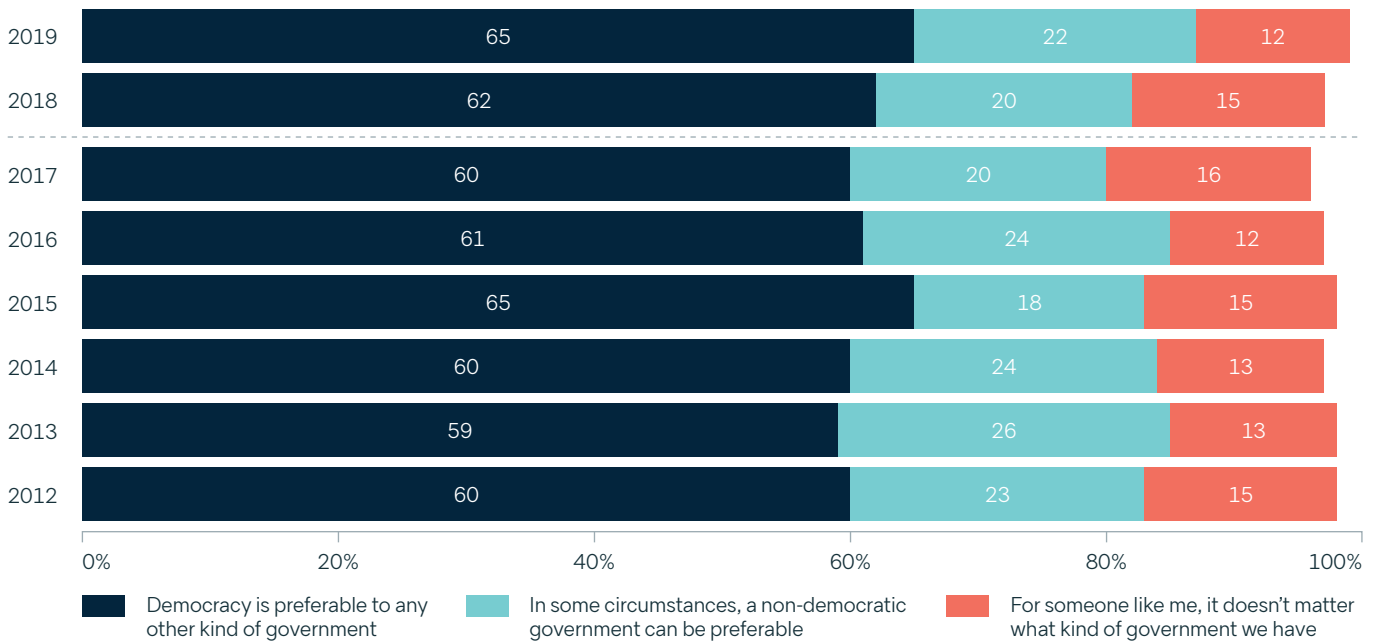
The gap between older and younger Australians on the importance of democracy – which has been striking in previous Lowy Institute Polls – appears to be narrowing. A majority of Australians aged 18–29 years (55%) in 2019 express a preference for democracy, compared with 68% of Australians aged over 30. In previous years this gap has been as large as 28 points. However, there is still a significant proportion (30%) of 18–29 year olds who say that ‘in some circumstances, a non-democratic government can be preferable’.

The gap between older and younger Australians on the importance of democracy appears to be narrowing

FIGURE 21

Democracy

Now a question about democracy. Below are some statements about democracy. Please indicate which one of the three statements comes closest to your own personal views about democracy.

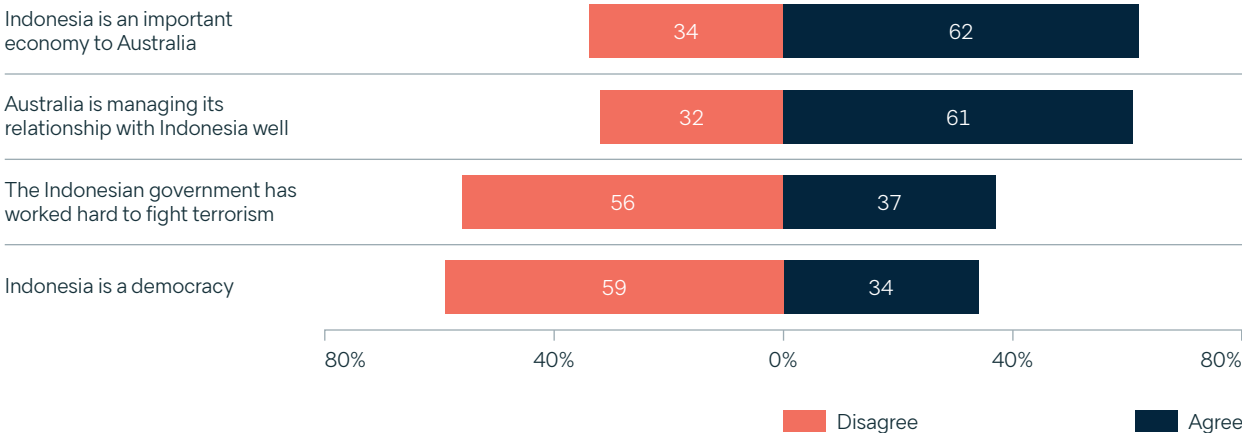


Dashed line indicates change in mode: see Methodology, p.38.

FIGURE 22

Indonesia

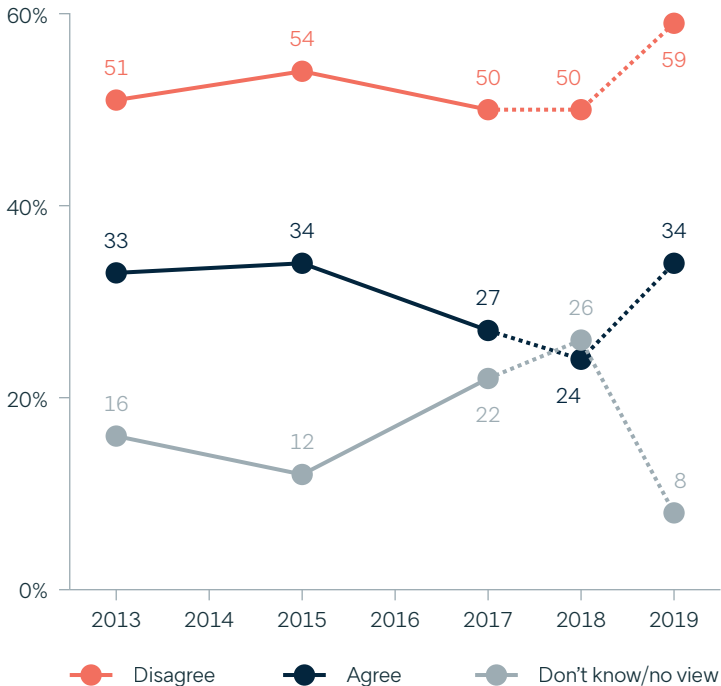
Here are a number of statements about Indonesia. For each one please indicate whether you personally agree or disagree.



Only one in three Australians say Indonesia is a democracy

FIGURE 23

Is Indonesia a democracy?



Dotted line indicates change in mode: see Methodology, p.38.

Indonesia

The Lowy Institute Poll has surveyed Australians on their views about Indonesia for 15 years, and their answers continue to demonstrate a lack of knowledge about our largest neighbour. Lowy Institute polling has consistently shown that most Australians do not view Indonesia as a democracy. In 2019, despite Indonesia’s presidential election campaign taking place at the same time as the fieldwork for the Poll, only 34% of Australians agree that ‘Indonesia is a democracy’.

A majority of Australians (61%, up nine points from 2018) say ‘Australia is managing its relationship with Indonesia well’. As in previous years, most Australians agree that Indonesia is an important economy to Australia (62%). However, around a third of Australians (37%) say that the Indonesian government has worked hard to fight terrorism, up five points from last year.

Pacific Islands

The Australian government announced plans to step up engagement in the Pacific in late 2017.⁸ One of the reasons for increased political interest in the Pacific is China's growing presence in the region.

Seven in ten say Australia should try to prevent China from increasing its influence in the Pacific

In 2018, the government established the Australian Infrastructure Financing Facility for the Pacific, which was reported by media as a response to growing Chinese influence in the Pacific.⁹ Consistent with increasing wariness towards China that has been recorded across the 2019 Poll, seven in ten Australians (73%) agree that 'Australia should try to prevent China from increasing its influence in the Pacific'.

More than half of Australians (55%) believe that China opening a military base in the Pacific would be a critical threat (see page 9). A majority (54%) also agree that 'Australia should partner with Papua New Guinea and the United States in redeveloping a joint military base on Manus Island'.

The Pacific Islands are the largest recipient of Australian aid, receiving \$1.3 billion in aid in 2018–19.¹⁰ A sizeable majority of Australians (77%) agree that 'Australia has a moral obligation to help the Pacific'. However, their views on the role of aid in the Pacific are complicated: most Australians (60%) disagree with the statement that 'Australian aid to the Pacific has little impact on life in the Pacific'. But they are evenly split about the broader Pacific step-up, with 49% agreeing and 48% disagreeing that 'Australia should spend more than it currently does on helping the Pacific'.

FIGURE 24

Pacific Islands

Now a question about the Pacific. Please indicate whether you personally agree or disagree with each of the following statements:

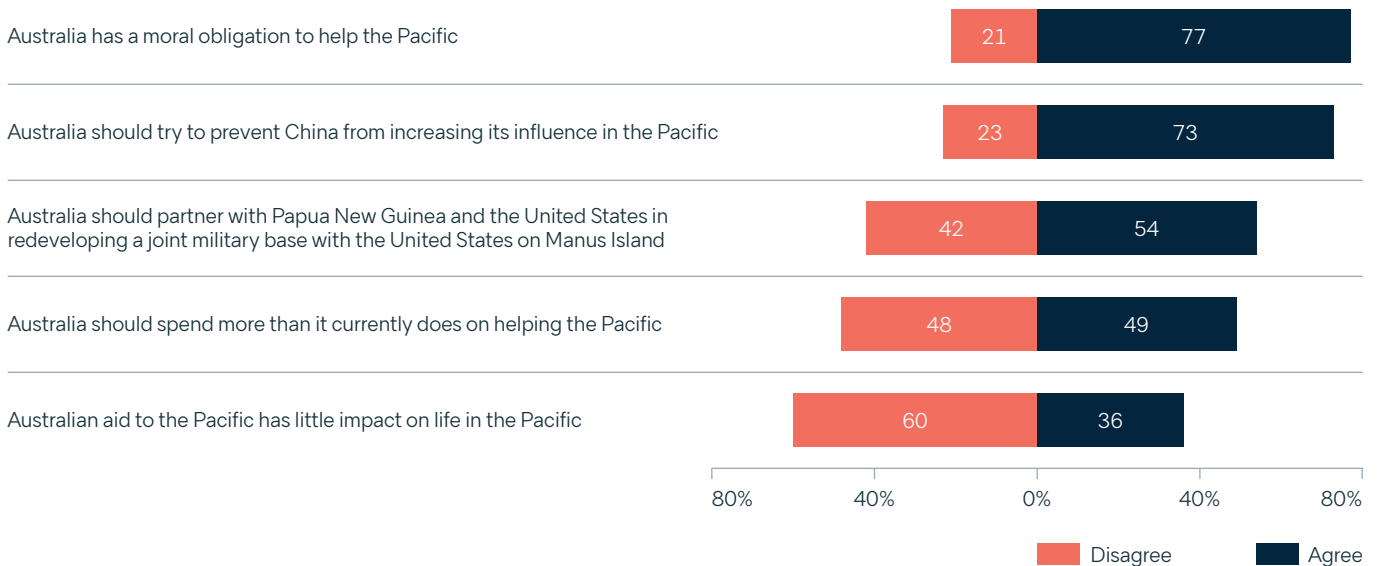
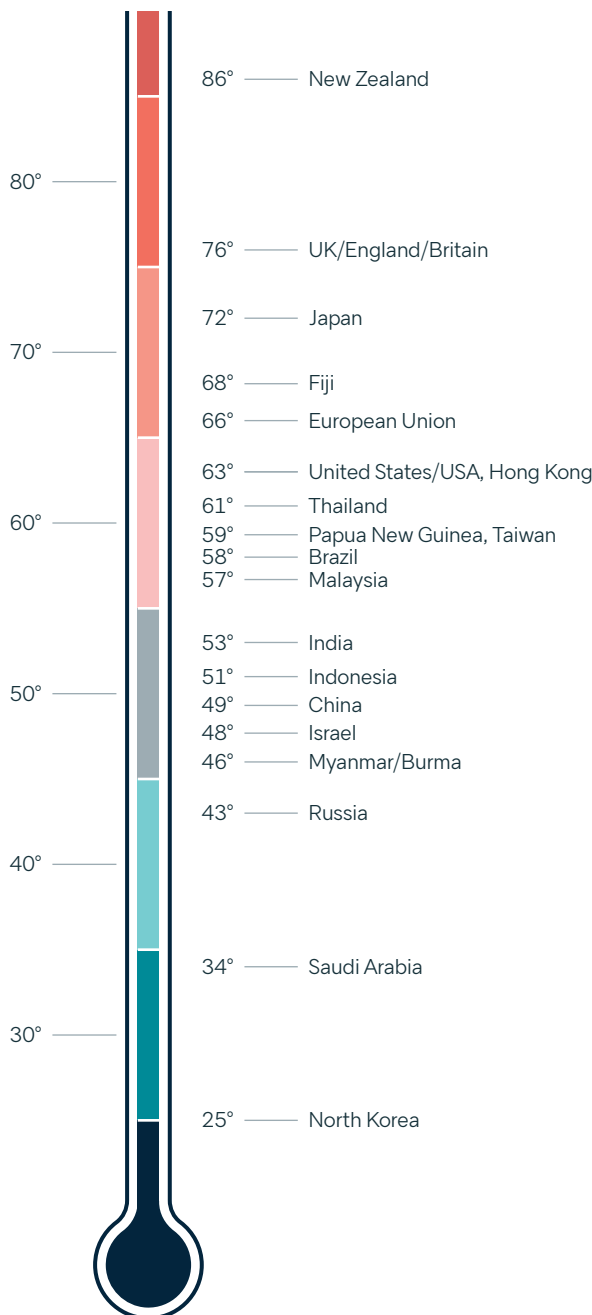


FIGURE 25
Feelings towards other countries

Please rate your feelings towards some countries and territories, with one hundred meaning a very warm, favourable feeling, zero meaning a very cold, unfavourable feeling, and fifty meaning not particularly warm or cold. You can use any number from zero to one hundred: the higher the number the more favourable your feelings are toward that country or territory. If you have no opinion or have never heard of that country or territory, please say so.



Feelings thermometer

An English-speaking country has topped the Lowy Institute feelings thermometer this year, as in every other Lowy Institute Poll. On a scale of 0° (coldest feelings) to 100° (warmest feelings), Australians give our neighbour and 'best friend' New Zealand a very warm 86°. The United Kingdom remains in high regard at 76° (although down six points from 2018).

Not all English-speaking countries receive similarly high levels of warmth. The United States has dropped four degrees to 63°.

Japan is in third place on the feelings thermometer at 72°. Fiji follows, with 68°, and the European Union at 66°. Feelings towards Thailand have remained steady at 61°. Closer to home, increased attention on Papua New Guinea while it hosted APEC in 2018 has not boosted Australians' feelings, which have marginally cooled to 59°. Brazil and Malaysia follow, at a warmish 58° and 57°, respectively.

This year, China, Taiwan and Hong Kong appeared in the same feelings thermometer for the first time in a Lowy Institute Poll. Australians hold warm feelings towards Hong Kong (63°) and Taiwan (59°), but feelings towards China have cooled significantly this year. At 49°, China has fallen nine degrees from 2018 in the largest fall and the lowest result China has received since the Lowy Institute first asked this question in 2006.

Feelings towards India (53°) and Indonesia (51°) have marginally cooled from previous years, but remain slightly warmer than neutral. Australians place Israel (48°) and Myanmar (46°) on the cooler side of the thermometer.¹¹

Australians continue to feel cool towards Russia (43°) and Saudi Arabia (34°). North Korea again receives the coldest feelings from Australians, remaining steady at a frosty 25°. This antipathy appears to be unaffected by the high-profile meetings between North Korea's leader and US President Donald Trump in 2018.

TABLES OF RESULTS

Please note that totals may not add to 100% due to rounding. Each response option has been rounded individually and grouped responses (e.g. those who 'somewhat agree' plus 'strongly agree') have not been rounded at the group level. Throughout the tables, an '#' represents a change in Poll fieldwork methodology. See page 38 for further details.

TABLE 1

Trust in major powers

How much do you trust the following countries to act responsibly in the world?

	2019 (ranked by total who trust 'a great deal' and 'somewhat')						
	A great deal	Somewhat	Total: a great deal and somewhat	Not very much	Not at all	Total: not very much and not at all	Don't know/ no view
United States	14%	38%	52%	34%	14%	48%	0%
China	4%	28%	32%	43%	25%	68%	0%

	A great deal							Total: 'a great deal' and 'somewhat' (ranked by 2019)						
	2006	2008	2009	2011	2017	2018	2019#	2006	2008	2009	2011	2017	2018	2019#
United States	19%	24%	39%	40%	20%	15%	14%	60%	69%	83%	83%	61%	55%	52%
China	7%	7%	7%	12%	8%	7%	4%	60%	47%	59%	60%	54%	52%	32%

TABLE 2

Major power relations

Now thinking about Australian foreign policy, do you think the Australian government should put a higher priority on:

	Agree
Maintaining strong relations with the United States, even if this might harm our relations with China	50%
Building stronger relations with China, even if this might harm our relations with the United States	44%
Don't know	6%

TABLE 3

Confidence in world leaders

Here is a list of political leaders. For each, please indicate how much confidence you have in each leader to do the right thing regarding world affairs – a lot of confidence, some confidence, not too much confidence or no confidence at all.

	2019 (ranked by total saying 'a lot of' and 'some' confidence)							
	A lot	Some	Total: a lot and some confidence	Not too much	Not at all	Total: not too much confidence and none at all	Not sure who the person is	Don't know/ no view
New Zealand Prime Minister Jacinda Ardern	52%	36%	88%	7%	3%	10%	1%	1%
Australian Prime Minister Scott Morrison	16%	42%	58%	28%	14%	42%	0%	0%
Australian Opposition Leader Bill Shorten	10%	42%	52%	30%	18%	48%	0%	0%
Indonesian President Joko Widodo	2%	32%	34%	45%	18%	63%	3%	0%
Chinese President Xi Jinping	2%	28%	30%	45%	23%	68%	2%	0%
US President Donald Trump	8%	17%	25%	30%	46%	76%	0%	0%
Myanmar leader Aung San Suu Kyi	2%	23%	25%	48%	20%	68%	7%	1%
Russian President Vladimir Putin	3%	18%	21%	35%	43%	78%	1%	1%
North Korean leader Kim Jong-un	2%	5%	7%	23%	70%	93%	0%	1%

Total: 'a lot of' and 'some' confidence (ranked by 2019)

	2018	2019#
New Zealand Prime Minister Jacinda Ardern	-	88%
Australian Prime Minister Scott Morrison	-	58%
Australian Opposition Leader Bill Shorten	-	52%
Indonesian President Joko Widodo	-	34%
Chinese President Xi Jinping	43%	30%
US President Donald Trump	30%	25%
Myanmar leader Aung San Suu Kyi	-	25%
Russian President Vladimir Putin	19%	21%
North Korean leader Kim Jong-un	5%	7%

TABLES OF RESULTS

TABLE 4

Attitudes towards China

Now a few more questions about China. Please indicate whether you personally agree or disagree with each of the following statements:

		Agree	Disagree	Neither/no view
China's infrastructure investment projects across Asia are part of China's plans for regional domination	2019	79%	19%	2%
Australia should do more to resist China's military activities in our region, even if this affects our economic relationship ^a	2015	66%	27%	6%
	2019 [#]	77%	20%	3%
Australia is too economically dependent on China	2019	74%	24%	2%
China's infrastructure investment projects across Asia are good for the region	2019	44%	52%	4%
	2008	35%	62%	3%
Australia is doing enough to pressure China to improve human rights ^b	2010	29%	66%	5%
	2011	36%	58%	6%
	2019 [#]	27%	70%	3%

^a In 2015, the question asked was about China's military 'aggression', as opposed to China's military 'activities' in 2019.

^b Combined responses for 'strongly agree' and 'agree', and 'strongly disagree' and 'disagree' for 2008, 2010 and 2011.

TABLE 5

Chinese investment

And now about Chinese investment in Australia. Overall, do you think the Australian government is:

	2009	2010	2011	2012	2013	2014	2018	2019 [#]
Allowing too much investment from China	50%	57%	57%	56%	57%	56%	72%	68%
Allowing about the right amount of investment from China	42%	34%	35%	37%	33%	34%	24%	28%
Not allowing enough investment from China	3%	3%	3%	3%	4%	4%	2%	3%
Don't know/no view	5%	6%	5%	4%	6%	5%	3%	1%

TABLE 6

Attitudes towards the United States

Here are some different arguments about the alliance relationship with the United States. For each one, please indicate whether you personally agree or disagree.

	Agree	Disagree	Neither/ don't know/no view
Australians and Americans share many common values and ideals. A strong alliance is a natural extension of this	73%	26%	1%
The United States would come to Australia's defence if Australia was under threat	73%	25%	2%
Australia's alliance with the United States makes it more likely Australia will be drawn into a war in Asia that would not be in Australia's interests	69%	30%	1%
Donald Trump has weakened Australia's alliance with the United States	66%	33%	1%
The alliance relationship with the United States makes Australia safer from attack or pressure from China	56%	42%	2%
The United States is in decline relative to China and so the alliance is of decreasing importance	46%	52%	3%
	Percentage saying 'agree' (ranked by 2019)		
	2011	2015	2019#
Australians and Americans share many common values and ideals. A strong alliance is a natural extension of this	78%	77%	73%
The United States would come to Australia's defence if Australia was under threat	-	-	73%
Australia's alliance with the United States makes it more likely Australia will be drawn into a war in Asia that would not be in Australia's interests	73%	58%	69%
Donald Trump has weakened Australia's alliance with the United States	-	-	66%
The alliance relationship with the United States makes Australia safer from attack or pressure from China	57%	53%	56%
The United States is in decline relative to China and so the alliance is of decreasing importance	41%	37%	46%

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TABLE 7

Importance of the US alliance

And now about Australia's alliance relationship with the United States. How important is our alliance relationship with the United States for Australia's security?

	2005	2006	2007	2008	2009	2010	2011	2012	2013	2014	2015	2016	2017	2018	2019#
Very important	45%	42%	36%	42%	55%	56%	59%	59%	54%	52%	53%	42%	53%	48%	38%
Fairly important	27%	28%	27%	34%	30%	30%	23%	28%	28%	26%	27%	29%	24%	28%	34%
Total: very and fairly important	72%	70%	63%	76%	85%	86%	82%	87%	82%	78%	80%	71%	77%	76%	72%
Somewhat important	20%	22%	27%	20%	12%	12%	15%	12%	16%	17%	16%	22%	18%	20%	23%
Not at all important	7%	8%	9%	4%	2%	2%	3%	1%	3%	4%	4%	7%	4%	4%	4%
Don't know/no view	1%	1%	1%	-	0%	0%	0%	0%	0%	0%	1%	1%	1%	1%	0%

TABLE 8

Australia's best friend in the world

Now about Australia's relations with other countries around the world. In your personal opinion, which one of the following countries is Australia's best friend?

	2014 ^c	2017	2019#
New Zealand	32%	53%	59%
United States	35%	17%	20%
United Kingdom or the UK	17%	17%	15%
China	9%	8%	4%
Japan	1%	2%	2%
Indonesia	1%	1%	1%

^c This question was first asked on behalf of the Lowy Institute by Newspoll in its omnibus survey on 2-4 May 2014 (Sample: 1207 respondents).

TABLE 9

Brexit

Now a question about the United Kingdom and its vote to leave the European Union. Do you personally think the United Kingdom leaving the European Union will be a good thing or a bad thing for:

	Good thing	Bad thing	Neither good nor bad	Don't know/no view
The United Kingdom	32%	62%	1%	6%
The European Union	22%	70%	2%	7%
The West	32%	58%	2%	8%

TABLE 10

Threats to vital interests

Here is a list of possible threats to the vital interests of Australia in the next ten years. For each one, please select whether you see this as a critical threat, an important but not critical threat, or not an important threat at all.

	2019 (ranked by percentage saying 'a critical threat')				
	Critical threat	An important but not critical threat	Total: critical and important threat	Not an important threat at all	Don't know/ no view
Climate change	64%	26%	90%	9%	1%
Cyberattacks from other countries	62%	33%	95%	5%	0%
International terrorism	61%	33%	94%	6%	0%
North Korea's nuclear program	60%	32%	92%	7%	0%
If China opened a military base in a Pacific Island country	55%	40%	95%	4%	0%
A severe downturn in the global economy	51%	43%	94%	5%	1%
Foreign interference in Australian politics	49%	44%	93%	6%	0%
Frequent changes in Australia's political leadership	43%	48%	91%	9%	0%
Foreign investment in Australia	39%	51%	90%	9%	1%
Large numbers of immigrants and refugees coming into Australia	36%	40%	76%	24%	0%

	Percentage saying 'a critical threat' (ranked by 2019)						
	2006	2008	2009	2014	2017	2018	2019#
Climate change ['global warming' from 2006 to 2009]	68%	66%	52%	46%	57%	58%	64%
Cyberattacks from other countries	-	-	-	51%	55%	57%	62%
International terrorism	73%	66%	68%	65%	68%	66%	61%
North Korea's nuclear program	-	-	-	-	65%	66%	60%
If China opened a military base in a Pacific Island country	-	-	-	-	-	-	55%
A severe downturn in the global economy	-	-	-	-	53%	50%	51%
Foreign interference in Australian politics	-	-	-	-	-	41%	49%
Frequent changes in Australia's political leadership	-	-	-	-	-	-	43%
Foreign investment in Australia	-	-	-	43%	40%	-	39%
Large numbers of immigrants and refugees coming into Australia	31%	33%	39%	-	-	40%	36%

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TABLE 11

Use of Australian military forces

Now about Australian military forces. There has been some discussion about the circumstances that might justify using Australian military forces in other parts of the world. Please give your opinion about the following situations. Would you personally be in favour or against the use of Australian military forces:

	2017			2019#		
	In favour	Against	Neither/ no view	In favour	Against	Neither/ no view
To stop a government from committing genocide and killing large numbers of its own people	76%	20%	4%	80%	19%	2%
To restore law and order in a Pacific nation	77%	19%	5%	77%	21%	2%
To fight against violent extremist groups in Southeast Asia	-	-	-	63%	36%	2%
To conduct freedom of navigation naval operations in the South China Sea and other disputed areas claimed by China	-	-	-	60%	37%	3%
To fight against violent extremist groups in Iraq and Syria	61%	35%	5%	50%	47%	3%
If China invaded Taiwan and the United States decided to intervene	-	-	-	43%	54%	3%
If China initiated a military conflict with one of its neighbours over disputed islands or territories	34%	58%	9%	34%	62%	4%

TABLE 12

Technology and foreign companies

Now a question about new technology. When considering which foreign companies should be allowed to supply new technology for important services in Australia, which one of the following should be the first priority for the Australian government in your view?

	2019
Protecting Australians from foreign state intrusion	44%
Bringing the most sophisticated technology to Australia	28%
Keeping prices down for Australian consumers	28%
Don't know/no view	1%

TABLE 13

Climate change and global warming

Now about global warming. There is a controversy over what the countries of the world, including Australia, should do about the problem of global warming. Please indicate which of the following three statements comes closest to your own point of view.

	2006	2008	2009	2010	2011	2012	2013	2014	2015	2016	2017	2018	2019#
Global warming is a serious and pressing problem. We should begin taking steps now even if this involves significant costs	68%	60%	48%	46%	41%	36%	40%	45%	50%	53%	54%	59%	61%
The problem of global warming should be addressed, but its effects will be gradual, so we can deal with the problem gradually by taking steps that are low in cost	24%	32%	39%	40%	40%	45%	44%	38%	38%	36%	37%	31%	28%
Until we are sure that global warming is really a problem, we should not take any steps that would have economic costs	7%	8%	13%	13%	19%	18%	16%	15%	12%	11%	9%	10%	10%
Don't know/refused	1%	0%	1%	1%	1%	1%	1%	2%	0%	0%	0%	1%	1%

TABLE 14

Energy policy priorities

Now thinking about energy policy, which one of the following goals do you personally think should be the main priority for the federal government?

	2019
Reducing carbon emissions	47%
Reducing household bills	38%
Reducing the risk of power blackouts	15%
Don't know/no view	1%

TABLES OF RESULTS

TABLE 15

Immigration rate

Thinking now about Australia's immigration program. Do you personally think that the total number of migrants coming to Australia each year is too high, too low, or about right?

	2014	2017	2018	2019#
Too high	37%	40%	54%	47%
About right	47%	35%	30%	40%
Too low	14%	18%	14%	13%
Don't know/no view	3%	7%	3%	1%

TABLE 16

Attitudes to immigration

Please indicate whether you personally agree or disagree with each of the following statements about immigration.

	2016			2019#		
	Agree	Disagree	Neither/don't know/no view	Agree	Disagree	Neither/don't know/no view
Australian cities are already too crowded	-	-	-	71%	29%	1%
Overall, immigration has a positive impact on the economy of Australia	73%	24%	3%	67%	32%	2%
Immigrants strengthen the country because of their hard work and talents	72%	25%	4%	65%	34%	2%
Accepting immigrants from many different countries makes Australia stronger	72%	26%	3%	62%	37%	1%
Immigrants are a burden on our social welfare system	40%	56%	4%	48%	50%	2%
Immigrants take away jobs from other Australians	35%	62%	3%	40%	59%	1%

TABLE 17

Border protection and Australia's reputation

In your view, do Australia's border protection policies help, hurt or make no difference to its international reputation?

	Help	Hurt	Make no difference	Don't know/no view
	30%	28%	40%	2%

TABLE 18

Economic optimism

Now about Australia's economic performance in the world. Overall, how optimistic are you about Australia's economic performance in the world over the next five years?

	2005	2007	2008	2009	2010	2013	2015	2016	2017	2019#
Very optimistic	14%	19%	11%	16%	19%	14%	9%	9%	9%	5%
Optimistic	53%	52%	65%	70%	67%	62%	54%	61%	65%	60%
Total: optimistic	67%	71%	76%	86%	86%	76%	63%	70%	74%	65%
Pessimistic	8%	9%	19%	11%	10%	15%	29%	25%	20%	30%
Very pessimistic	2%	2%	4%	2%	3%	6%	5%	5%	4%	4%
Total: pessimistic	10%	11%	23%	13%	13%	21%	34%	30%	24%	34%
Neutral ^d	21%	17%	-	-	-	-	-	-	-	-
Don't know/no view	2%	2%	1%	1%	1%	3%	3%	1%	3%	1%

^d A 'neutral' option was included in 2005 and 2007.

TABLE 19

Free trade

Overall, do you personally think free trade is good or bad for the following:

	2017			2019#		
	Good	Bad	Neither/don't know/no view	Good	Bad	Neither/don't know/no view
Your own standard of living	67%	16%	16%	75%	20%	5%
The Australian economy	67%	23%	10%	71%	25%	4%
Australian companies	61%	28%	11%	65%	31%	4%
Creating jobs in Australia	55%	35%	10%	61%	35%	4%

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TABLE 20

Globalisation

Now on globalisation. Do you believe that globalisation, especially the increasing connections of our economy with others around the world, is mostly good or mostly bad for Australia?

	2006	2008	2009	2017	2019#
Mostly good	64%	72%	79%	78%	72%
Mostly bad	28%	23%	18%	15%	24%
Neither/don't know/no view	8%	6%	4%	8%	4%

TABLE 21

Budget priorities

Now about the federal budget. If you were making up the budget for the federal government this year, would you personally increase spending, decrease spending or keep spending about the same for:

	Increase spending	Decrease spending	Keep spending about the same	Don't know/no view
Health	81%	3%	16%	0%
Education	74%	3%	23%	0%
Social welfare	47%	16%	37%	0%
Border protection	32%	17%	52%	0%
Defence	31%	21%	47%	0%
Foreign aid	17%	47%	36%	0%

TABLE 22

Foreign aid and Australia

In your view, does giving foreign aid to other countries help, hurt, or make no difference to:

	Help	Hurt	Make no difference	Don't know/no view
Australia's relations with other countries	70%	4%	25%	1%
Australia's national security	44%	10%	44%	2%
Australia's economy	28%	39%	32%	1%

TABLE 23

Democracy

Now a question about democracy. Below are some statements about democracy. Please indicate which one of the three statements comes closest to your own personal views about democracy.

	2012	2013	2014	2015	2016	2017	2018	2019#
Democracy is preferable to any other kind of government	60%	59%	60%	65%	61%	60%	62%	65%
In some circumstances, a non-democratic government can be preferable	23%	26%	24%	18%	24%	20%	20%	22%
For someone like me, it doesn't matter what kind of government we have	15%	13%	13%	15%	12%	16%	15%	12%
Don't know/no view	1%	2%	3%	2%	3%	4%	3%	1%

TABLE 24

Satisfaction with democracy

On the whole, are you very satisfied, fairly satisfied, not very satisfied or not at all satisfied with the way democracy works in Australia?

	2019
Very satisfied	13%
Fairly satisfied	57%
Total: very and fairly satisfied	70%
Not very satisfied	23%
Not at all satisfied	7%
Don't know	1%

TABLES OF RESULTS

TABLE 25

Indonesia

Here are a number of statements about Indonesia. For each one, please indicate whether you personally agree or disagree.^e

	Agree	Disagree	Neither/don't know/ no view		
Indonesia is an important economy to Australia	62%	34%	4%		
Australia is managing its relationship with Indonesia well	61%	32%	6%		
The Indonesian government has worked hard to fight terrorism	37%	56%	7%		
Indonesia is a democracy	34%	59%	8%		
	Percentage saying 'agree' (ranked by 2019)				
	2013	2015	2017	2018	2019 [#]
Indonesia is an important economy to Australia	65%	-	-	58%	62%
Australia is managing its relationship with Indonesia well	61%	-	-	52%	61%
The Indonesian government has worked hard to fight terrorism	-	-	-	32%	37%
Indonesia is a democracy ^f	33%	34%	27%	24%	34%

^e In 2013, 2015 and 2017, answers were given on a scale of strongly agree, somewhat agree, somewhat disagree, and strongly disagree.

^f In 2015 and 2017, this was asked as 'Now a question about Indonesia. Do you personally agree or disagree that Indonesia is a democracy?'

TABLE 26

Pacific Islands

Now a question about the Pacific. Please indicate whether you personally agree or disagree with each of the following statements:

	Agree	Disagree	Neither/don't know/ no view
Australia has a moral obligation to help the Pacific	77%	21%	2%
Australia should try to prevent China from increasing its influence in the Pacific	73%	23%	3%
Australia should partner with Papua New Guinea and the United States in redeveloping a joint military base with the United States on Manus Island	54%	42%	5%
Australia should spend more than it currently does on helping the Pacific	49%	48%	3%
Australian aid to the Pacific has little impact on life in the Pacific	36%	60%	4%

TABLE 27

Feelings towards other countries

Please rate your feelings towards some countries and territories, with one hundred meaning a very warm, favourable feeling, zero meaning a very cold, unfavourable feeling, and fifty meaning not particularly warm or cold. You can use any number from zero to one hundred: the higher the number the more favourable your feelings are toward that country or territory. If you have no opinion or have never heard of that country or territory, please say so.⁹

	2006	2007	2008	2009	2010	2011	2012	2013	2014	2015	2016	2017	2018	2019 [#]
New Zealand	-	81	-	83	84	85	85	-	84	83	-	85	86	86
UK/England/Britain ^h	74	75	77	-	-	79	-	77	-	79	-	81	82	76
Japan	64	63	64	66	64	67	70	65	67	68	70	71	74	72
Fiji	-	-	67	63	-	66	68	64	68	68	-	-	-	68
European Union	-	-	-	-	-	-	-	-	-	-	-	62	67	66
Hong Kong	-	-	-	-	-	-	-	-	-	-	-	-	-	63
United States/USA	62	60	64	67	68	70	71	70	71	73	68	69	67	63
Thailand	-	-	-	59	-	63	-	-	-	-	-	-	-	61
Papua New Guinea	63	57	60	-	62	-	64	60	59	58	63	61	63	59
Taiwan	-	-	-	-	-	58	-	-	-	-	59	-	60	59
Brazil	-	-	-	-	-	-	-	62	-	-	-	-	-	58
Malaysia	58	58	-	-	60	-	60	58	-	58	-	-	-	57
India	62	55	57	56	55	56	58	55	57	56	59	60	58	53
Indonesia	50	47	50	49	54	51	54	53	52	46	54	55	54	51
China	61	56	56	53	54	53	59	54	60	58	58	59	58	49
Israel	55	50	-	-	49	-	-	53	51	-	-	53	-	48
Myanmar/Burma	-	-	-	46	-	-	50	50	50	-	55	54	50	46
Russia	-	-	55	-	55	-	-	-	-	45	52	50	47	43
Saudi Arabia	-	-	-	-	-	-	-	-	-	-	-	-	40	34
North Korea	43	-	-	30	37	34	33	31	29	29	26	30	25	25

⁹ In 2006, this question asked respondents about their feelings towards 'countries and peoples'. From 2007 to 2018, this question asked respondents about their feelings towards 'countries'.

^h Until 2015, asked as 'Great Britain'; from 2015 asked as 'United Kingdom (Great Britain)'.

ABOUT THE LOWY INSTITUTE POLL

Methodology

The 2019 Lowy Institute Poll reports the results of a national survey of 2130 Australian adults between 12 and 25 March 2019. The survey was conducted by the Social Research Centre (SRC), using the Life in Australia™ panel – currently the only probability-based online panel in Australia. Members of the panel were randomly recruited via their landline or mobile telephone (rather than being self-selected volunteers) and agreed to provide their contact details to take part in surveys on a regular basis. SRC uses a mixed-mode approach for the panel, including online surveys (89% of respondents) and computer-assisted telephone interviewing (11% of respondents) to provide coverage of the offline population (households without internet access). The order of questions in the questionnaire was different from the order presented in this report.

On a simple random sample of 2130 responses, the margin of error is 2.1%. Where a complex sample is used, the 'design effect' measures the additional variance in comparison with a simple random sample. The design effect for this survey is estimated at 2.40.

For the 2019 Lowy Institute Poll survey, a completion rate of 79.1% was achieved. Taking into account the recruitment rate to the panel and attrition from the panel, the cumulative response is 8.9%, which compares favourably with international probability-based panels. Unlike other commercial online panels in Australia, the probability basis of the

Life in Australia sampling method means results are generalisable to the national population and sampling errors and confidence intervals can be calculated.

The use of the Life in Australia panel for the 2019 Lowy Institute Poll represents the final stage in a three-year transition in the methodology for Lowy Institute polling, which until 2017 was conducted solely by telephone. From 2005 to 2011, the Poll was conducted by landline only. From 2012 to 2017, it was conducted using both landline and mobile numbers. In 2017, SRC administered four key questions from the Poll to an online sample of 2513 respondents in parallel with the telephone survey of 1200 respondents, which was reported in the 2017 Lowy Institute Poll. This parallel survey provided valuable comparison information between the two methodologies. In 2018, the Lowy Institute Poll was a combination of a telephone-only sample of 600 respondents and an online sample of 600 respondents drawn from the SRC Life in Australia panel.

In order to ensure comparability of the 2018 Poll with the telephone responses of our 2005–17 Polls, the response sets were weighted and blended using the following approach: first, weights for the telephone respondents (50% of the sample) were calculated accounting for the dual chances of being contacted by landline or mobile, and reflecting key population characteristics. Then, for each online respondent, the most similar telephone respondent was found using a range of survey variables, and that person's telephone weighting was used as the 'base weight' for the next step. Finally, the telephone and online responses were then combined into a single data set, and the results then weighted to reflect the demographic profile of the Australian population aged 18 years and over based on Australian Bureau of Statistics population data.

The transition to a predominantly online survey panel for the 2019 Lowy Institute Poll mirrors shifts in survey methods by highly respected polling organisations internationally. The Pew Research Center has recently moved the majority of its US polling online,¹² primarily through its American

Trends Panel,¹³ another probability-based online panel. The Chicago Council on Global Affairs,¹⁴ which has been conducting nationwide surveys on foreign policy since 1974, moved to online polling in 2004. The decision to move to an online survey methodology was made because of the declining productivity of telephone surveys. The number of fixed-line telephones is steadily decreasing, and more of the population has moved to mobile-only households which facilitates call-screening. A decline in contact rates and, to a lesser extent, cooperation rates, has led to reduced response rates for landline and mobile phones.

Some questions in the 2019 Lowy Institute Poll are new and are not affected by the possibility for ‘mode’ differences (where respondents may answer the same question differently in an in-person telephone interview compared with an online survey which removes the human element and provides more time for consideration of responses). However, the majority of questions in the 2019 survey are ‘tracking’ questions that have been asked in previous Lowy Institute Polls, allowing us to compare public opinion on a single issue over time. Footnotes and dotted lines have been used in the charts in the Poll to represent this change of mode, which can elicit slightly different responses.

Data quality checks for the online portion of the sample included checks for ‘speeding’ (completing the survey rapidly), ‘straight-lining’ (providing the same answer to every question of a bank of items with the same response options), and the number of non-substantive responses given (don’t know or refused). There was no single determining factor in deciding whether to exclude a case: factors were considered together and included the degree of speeding and the difficulty of straight-lining a particular bank of items.

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NOTES

- 1 In 2015, the question asked was about China's military 'aggression', as opposed to China's military 'activities' in 2019.
- 2 David Wroe, "China Eyes Vanuatu Military Base in Plan with Global Ramifications", *The Sydney Morning Herald*, 9 April 2018, <https://www.smh.com.au/politics/federal/china-eyes-vanuatu-military-base-in-plan-with-global-ramifications-20180409-p4z8j9.html>.
- 3 In 2016 and 2017, the question asked was: "In response to China's increasing military activities in the South China Sea, the United States has been conducting maritime operations designed to ensure freedom of navigation in the region. Are you personally in favour or against Australia conducting similar operations in an effort to ensure freedom of navigation in the South China Sea?". In 2017, 68% were in favour; in 2016, 74% were in favour.
- 4 Alex Oliver, *Lowy Institute Poll 2015* (Sydney: Lowy Institute for International Policy, 2015), 8, <http://www.lowyinstitute.org/publications/lowy-institute-poll-2015>; Alex Oliver, *Lowy Institute Poll 2014* (Sydney: Lowy Institute for International Policy, 2014), 11, <http://www.lowyinstitute.org/publications/lowy-institute-poll-2014>.
- 5 Alex Oliver, *2016 Lowy Institute Polling: Australian Opinion on British Exit from European Union* (Sydney: Lowy Institute, 2016), <http://www.lowyinstitute.org/publications/2016-lowy-institute-polling-australian-opinion-british-exit-european-union>.
- 6 Mitch Fifield, "Government Provides 5G Security Guidance to Australian Carriers", Media Release, 23 August 2018, <https://www.minister.communications.gov.au/minister/mitch-fifield/news/government-provides-5g-security-guidance-australian-carriers>; Huawei Australia (@HuaweiOZ), "We have been informed by the Govt that Huawei & ZTE have been banned from providing 5G technology to Australia", Twitter, 22 August 2018, 4:36 pm, <https://twitter.com/huaweiOZ/status/1032411216184930304?lang=en>.
- 7 Sarah Cameron and Ian McAllister, 2018 Australian Election Study Interactive Data, www.australianelectionstudy.org.
- 8 Department of Foreign Affairs and Trade, "Stepping-up Australia's Pacific Engagement", <https://dfat.gov.au/geo/pacific/engagement/Pages/stepping-up-australias-pacific-engagement.aspx>.
- 9 Katharine Murphy, "Scott Morrison to Reveal \$3bn in Pacific Funding to Counter Chinese Influence", *The Guardian*, 8 November 2018, <https://www.theguardian.com/australia-news/2018/nov/08/scott-morrison-to-reveal-3bn-in-pacific-funding-to-counter-chinese-influence>.
- 10 Department of Foreign Affairs and Trade, "Strengthening our Pacific Partnerships", <https://dfat.gov.au/geo/pacific/engagement/Pages/strengthening-our-pacific-partnerships-infographic.aspx>.
- 11 During the transition to predominantly online polling, a minor difference was observed in some responses to the Lowy Institute feelings thermometer. The 2019 conclusions differ for three countries (Indonesia, Myanmar and Papua New Guinea) if the baseline against which change is assessed is the full 2018 online sample as opposed to the 2018 blended sample. In each case, what is a significant decline compared to the 2018 blended sample estimates is no longer statistically significant.
- 12 Courtney Kennedy and Claudia Deane, "What our Transition to Online Polling Means for Decades of Phone Survey Trends", Fact Tank, Pew Research Center, 27 February 2019, <https://www.pewresearch.org/fact-tank/2019/02/27/what-our-transition-to-online-polling-means-for-decades-of-phone-survey-trends/>.
- 13 Scott Keeter, "Growing and Improving Pew Research Center's American Trends Panel", Pew Research Center, 27 February 2019, <https://www.pewresearch.org/methods/2019/02/27/growing-and-improving-pew-research-centers-american-trends-panel/>.
- 14 Dina Smeltz and Craig Kafura, "Record Number of Americans Endorse Benefits of Trade", The Chicago Council on Global Affairs, 27 August 2018, <https://www.thechicagocouncil.org/publication/record-number-americans-endorse-benefits-trade>.

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