

LOWY INSTITUTE
**POLL
2018**

ALEX OLIVER

UNDERSTANDING
AUSTRALIAN
ATTITUDES
TO THE WORLD.

PREFACE

The remarkable developments over the past two years have raised questions about the global order under which Australia has prospered for many years.

In Europe, the British public voted to leave the European Union. In the United States, Americans elected a president who is an unbeliever in alliances and hostile to free trade. President Trump is sceptical of the liberal international order; personally he is neither liberal in his inclinations, nor international in his outlook, nor orderly in his behaviour.

In Asia, China continues its inexorable rise, pursuing muscular policies in the South China Sea and recasting power relations throughout the region. Critics have also accused Beijing of seeking to influence the Australian public debate.

The debate in Australia in the past year has been as raucous as ever, touching on issues including immigration and energy security. The Australian government's 2017 Foreign Policy White Paper depicted a deteriorating international order that will ask hard questions of Australian foreign policy.

In the face of such changes, the 2018 Lowy Institute Poll finds a mix of continuities and discontinuities. Fewer than one in five Australians are satisfied with the way things are going in the world – a result almost unchanged since last year, but striking nonetheless.

There is no question that Donald Trump's presidency has eroded Australians' trust and confidence in the United States as a responsible global actor: that trust has fallen to its lowest point in the Poll's history. Yet despite concerns about the current occupant of the White House, Australians' support for the US alliance has held firm.

Terrorism continues to present a potent threat in Australians' minds. This year, terrorism is again the top-ranked threat, as it has been consistently in Lowy Institute polling. There is continued scepticism about China's military intentions, and concern about Chinese investment in Australia. But equally consistent is a conviction on the part of most Australians that China represents more of an opportunity than a threat, and that Australia should be able to maintain good relationships with China and the United States at the same time.

What about discontinuities? For the first time, the Poll finds that a majority of Australians think the current rate of immigration to Australia is too high. In another shift, concern about climate change appears to be accelerating, and the public preference for renewables over coal has hardened, despite concerns about energy insecurity which might result from coal power station closures.

Australians remain remarkably sanguine about foreign interference in Australia's political processes following the furore over Chinese-linked donations to Australian political parties, politicians, and institutions. Foreign interference remains a low-order threat in the minds of Australians, who are almost equally concerned about US influence as Chinese influence.

The 'Anglosphere' maintains its grip on the Australian psyche, with New Zealand, Canada, and the United Kingdom topping our 'feelings thermometer' in 2018. Yet Australians are relatively comfortable about the rise of Asia: few perceive China's growing power as a critical threat to Australia's interests; most see Indonesia as an economic opportunity; and more Australians trust India to act responsibly in the world than the United States.

It was to observe and interpret such continuities and discontinuities that we established the Lowy Institute Poll in 2005. The 2018 Lowy Institute Poll, like the thirteen polls before it, helps us to understand how Australians see the world.

Dr Michael Fullilove

Executive Director
June 2018

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EXECUTIVE SUMMARY

Trust in countries and confidence in their leaders

A bare majority of Australians (55%) say they trust the United States to ‘act responsibly in the world’, in a six-point fall since 2017, a 28-point fall since 2011, and the lowest level of trust in the United States ever recorded in our polling.

Australians’ highest level of trust among the eight nations polled is placed in the United Kingdom (trusted by 90%). Japan is trusted by 87% of Australians, and France by 84%. Trust in India (59%) is ahead of the United States (55%), followed closely by China (52%). Just 28% trust Russia, and 8% trust North Korea.

Only 30% of Australians have either ‘a lot’ or ‘some’ confidence in Donald Trump ‘to do the right thing regarding world affairs’. This places Trump ahead of only Russia’s Vladimir Putin (19%) and North Korean leader Kim Jong-un (5%) among the nine leaders ranked. The leaders Australians regard with the most confidence are the UK’s Theresa May (68%) and Japan’s Shinzo Abe (66%). Next is Malcolm Turnbull (63%), and France’s Emmanuel Macron has the confidence of 61%. Eighteen points behind is China’s Xi Jinping (43%), followed by India’s Narendra Modi (37%).

Trump and the US alliance

Three-quarters (76%) of Australians say the US alliance is either ‘very’ or ‘fairly’ important for Australia’s security, in a result almost unchanged since last year. Only 31% say ‘Australia should distance itself from the United States under President Donald Trump’. Reluctance about Australia joining the United States in military action under Donald Trump has eased, with only a minority (48%, down 11 points since 2016) saying they would be ‘less likely ... to support Australia taking future military action in coalition with the United States under Donald Trump’.

Threats to Australia

Terrorism and North Korea’s nuclear program are the highest ranked threats this year: 66% of Australians say ‘international terrorism’ and 66% say ‘North Korea’s nuclear program’ are critical threats to the vital interests of Australia in the next ten years. Climate change ranks third (58% saying critical threat). Cyberattacks from other countries are seen as a critical threat by 57%.

Half (50%) see the prospect of a global economic downturn as a critical threat, and 42% consider the presidency of Donald Trump a critical threat. The ‘dissemination of false information or fake news’ is seen as a critical threat by 42% of Australians. Four in ten (40%) see ‘large numbers of immigrants and refugees coming into Australia’ as a critical threat, and 36% see ‘US foreign policy’ and ‘China’s growing power’ as critical threats.

Overall, 94% of Australians see international terrorism as either a critical or important threat. Of those, 93% say it is a threat because ‘terrorists could kill innocent Australian citizens in our cities’. Fewer (72%) say it is a ‘threat to our way of life in Australia’, and two-thirds (65%) say ‘terrorism makes it unsafe to travel overseas’.

Australians’ feeling of safety is at its lowest level in our 14-year polling history. In 2018, 78% say they feel either ‘very safe’ or ‘safe’, a result 13 points lower than in 2005 when 91% felt safe.

Foreign interference in Australian politics

Only 41% of Australians see ‘foreign interference in Australian politics’ as a critical threat to Australia’s vital interests. While 63% express concern about China’s influence in Australia’s political processes, 58% are concerned about the influence of the United States.

China

Almost three-quarters of Australian adults (72%, up from 56% in 2014) say the Australian government is ‘allowing too much investment from China’. As in previous years, a significant minority (46%) say it is ‘likely that China will become a military threat to Australia in the next 20 years’. Asked why, the strongest agreement was with the statement ‘China and the United States are likely to come into conflict in the future and Australia will end up being drawn into the conflict through its alliance with the United States’ (77% agreeing).

More than eight in ten (82%) Australians see China as ‘more of an economic partner’ than a ‘military threat’ (up three points since 2017). More than half (55%) see China as the world’s leading economic power, compared with 29% who see the United States this way.

Around eight in ten (81%) Australians say ‘it is possible for Australia to have a good relationship with China and a good relationship with the United States at the same time’.

Climate change and renewables

In 2018, 59% of Australians (up five points) say ‘global warming is a serious and pressing problem’ about which ‘we should begin taking steps now even if this involves significant costs’. Almost all Australians (84%, up three points) say ‘the government should focus on renewables, even if this means we may need to invest more in infrastructure to make the system more reliable’. Only 14% say ‘the government should focus on traditional energy sources such as coal and gas, even if this means the environment may suffer to some extent’.

Immigration

A majority (54%) say ‘the total number of migrants coming to Australia each year is too high’; 30% say it is ‘about right’; and 14% say it is ‘too low’. The same-sized majority say ‘Australia’s openness to people from all over the world is essential to who we are as a nation’. However, 41% say ‘if Australia is too open to people from all over the world, we risk losing our identity as a nation’.

Aid

When asked what percentage of the government budget is spent on foreign aid, Australians on average think that 14% of the budget is spent on aid, while they say 10% should be spent on aid. Australia’s aid budget is approximately 0.8% of the federal budget.

Papua New Guinea

Most Australians say ‘stability in Papua New Guinea is important to Australia’s national interest’ (76%), and 77% say ‘Australia has a moral obligation to help Papua New Guinea’. They are divided, however, on the impact of aid: 37% agree and 45% disagree that ‘Australian aid ... has little impact on life in Papua New Guinea’. A majority of Australians (59%) say ‘Australia’s relationship with Papua New Guinea has been damaged because of the Manus Island detention centre’.

Indonesia

In 2018, only 24% of Australians agree that Indonesia is a democracy. They are divided (44% agreeing and 44% disagreeing) on whether ‘Indonesia is a dangerous source of terrorism’, and only 32% agree that ‘the Indonesian government has worked hard to fight terrorism’. A majority (58%) agree that ‘Indonesia is an important economy to Australia’, and 52% agree that ‘Australia is managing its relationship with Indonesia well’.

Democracy

In similar results to previous years, 62% of Australians this year say ‘democracy is preferable to any other kind of government’; 20% say ‘in some circumstances, a non-democratic government can be preferable’; and 15% say ‘for someone like me, it doesn’t matter what kind of government we have’. Only 47% of Australians aged 18–44 years of age say ‘democracy is preferable to any other kind of government’.

Feelings towards other countries

Three Anglosphere countries top the feelings thermometer this year: New Zealand (86°), Canada (84°), and the United Kingdom (82°). The United States ranks lower, at 67°. Feelings towards the European Union warmed five points to 67°, while those towards Germany (71°) and France (70°) remained steady. Japan recorded a three-point rise to 74°, while feelings for South Korea (62°), the Philippines (61°), Taiwan (60°), and China (58°) are moderately warm. Feelings for Indonesia remain lukewarm at 54°, and neither warm nor cold for Myanmar (50°). In the Pacific, Papua New Guinea registers a warmish 63°, and East Timor a cooler 57°. Russia (47°), Saudi Arabia (40°), and North Korea (25°) all sit on the cold side of the thermometer.

Direction of the nation and the world

Only 17% of Australians are ‘satisfied with the way things are going in the world today’, while 78% are dissatisfied – a result almost unchanged since last year. Around half (49%) are satisfied with the way things are going in Australia today, and 46% are dissatisfied.

The 2018 Lowy Institute Poll reports the results of a nationally representative telephone and online survey conducted on behalf of the Lowy Institute by the Social Research Centre between 5 and 25 March 2018 with a sample size of 1200 Australian adults. The maximum sampling variance (‘error margin’) is approximately +/- 2.8%

AUSTRALIA AND THE WORLD

Trust in global powers

At a time when world events are rapidly evolving and the global order appears to be shifting, Australians are placing their trust in Western allies and friends. The clear exception is the United States. When we ask Australian adults how much they trust a range of countries to ‘act responsibly in the world’, a bare majority (55%) say they trust the United States either ‘a great deal’ or ‘somewhat’ to act responsibly. This is a six-point fall since 2017, a very substantial 28-point drop since 2011, and the lowest level of trust in the United States recorded since we first asked this question in the 2006 Lowy Institute Poll.

The United Kingdom earns Australians’ highest level of trust, as it did in 2017, and this despite its vote to exit from the European Union – a move not favoured by Australians when we asked them in 2016.¹ Almost all adult Australians (90%) trust the United Kingdom to ‘act responsibly in the world’. Japan is trusted by 87% of Australians, and France by 84%. Further behind, India is trusted by 59% of Australians, which places it ahead of the United States in Australians’ level of trust. China and the United States are not statistically separable on the question of trust, with 52% of

Australians trusting China to the same degree as they trust the United States. Russia is trusted by only 28% of Australians (down ten points since 2017), and North Korea by 8% (down four points).

Confidence in Donald Trump and other world leaders

US President Donald Trump appears to be a significant factor in Australians’ declining trust in the United States. Few Australians (30%) have either ‘a lot’ or ‘some’ confidence in President Trump ‘to do the right thing regarding world affairs’. Almost half of adult women (49%) have no confidence ‘at all’ in the President, compared with 30% of men. On a list of nine world leaders, President Trump is only placed ahead of Russian President Vladimir Putin and North Korean leader Kim Jong-un on this measure of confidence.

Australians’ confidence in world leaders corresponds strongly with their trust in the nations those leaders govern. UK Prime Minister Theresa May and Japanese Prime Minister Shinzo Abe top the list, with 68% and 66% of Australians respectively expressing their confidence in these leaders. Australian Prime Minister Malcolm Turnbull is close behind, with 63% of

Fig 1: Trust in global powers

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

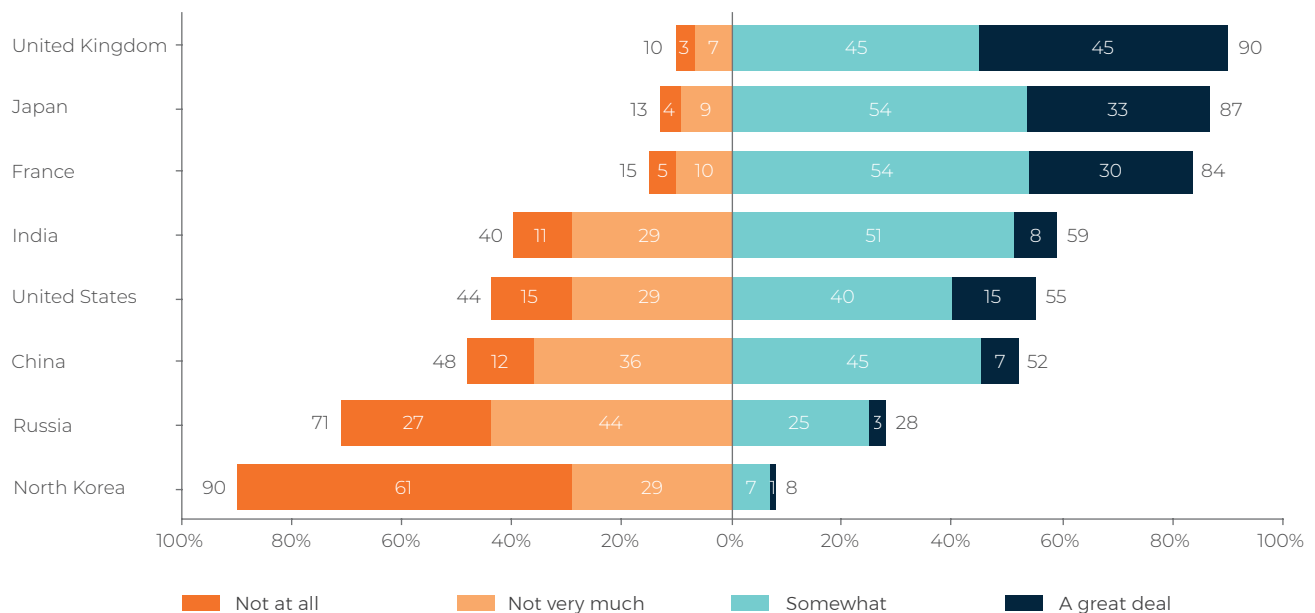
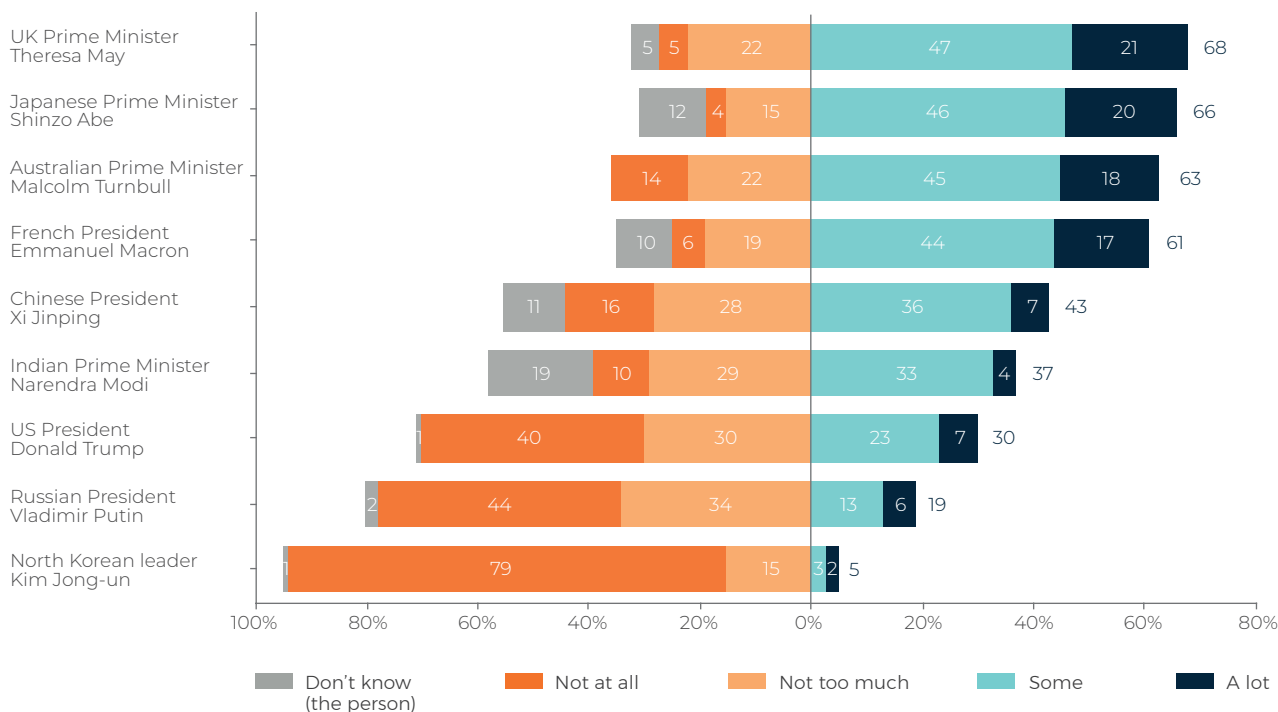


Fig 2: Confidence in world leaders

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.



Australians saying they have either ‘a lot’ of or ‘some’ confidence in him to do the right thing regarding world affairs. New French President Emmanuel Macron has earned the confidence of 61%.

There is a significant gap between Western and other leaders. Australians are wary of Chinese President Xi Jinping, with a minority (43%) expressing confidence in him. Indian Prime Minister Narendra Modi carries the confidence of just over a third (37%) of Australians – although this places him seven points ahead of Donald Trump (30%). Only 19% of Australians have confidence in Russian President Vladimir Putin, and 5% in North Korean leader Kim Jong-un.

Donald Trump and the US alliance

Despite the very low levels of confidence in US President Donald Trump, Australians remain strongly supportive of the US alliance. In a result almost unchanged from last year, 76% of Australians say the US alliance is either ‘very’ or ‘fairly’ important for Australia’s security. And 64% (again, almost identical to last year’s result) say ‘Australia should remain close to the United States under President Donald Trump’. Less than a third (31%) say ‘Australia should distance itself from the United States under President Donald Trump’.

Even among the 70% of Australians who say they have ‘not too much’ or ‘no confidence at all’ in Donald Trump, most of them (72%) say the alliance is either ‘very’ or ‘fairly’ important for Australia’s security.

Older Australians are more likely to express very strong support for the alliance: a majority of those aged 45 and over (58%) see the alliance as ‘very important’, compared with 38% of those under 45. Even among this younger group, however, 70% say the alliance is either ‘very’ or ‘fairly important’, and 95% say it is either ‘very’, ‘fairly’, or ‘somewhat important’.

It appears this broad support for the US alliance is practical in nature, not merely symbolic. Despite Australians’ falling level of trust in the United States to act responsibly in the world, only 48% say they would be ‘less likely ... to support Australia taking future military action in coalition with the United States under Donald Trump’ now that he is President. This is 11 points lower than the 59% of Australians in 2016 who said they would be less likely to support Australia taking military action with the United States under Donald Trump. In other words, reluctance about Australia joining the United States in military action under the Trump administration has eased since the new President took office.

Fig 3: 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?

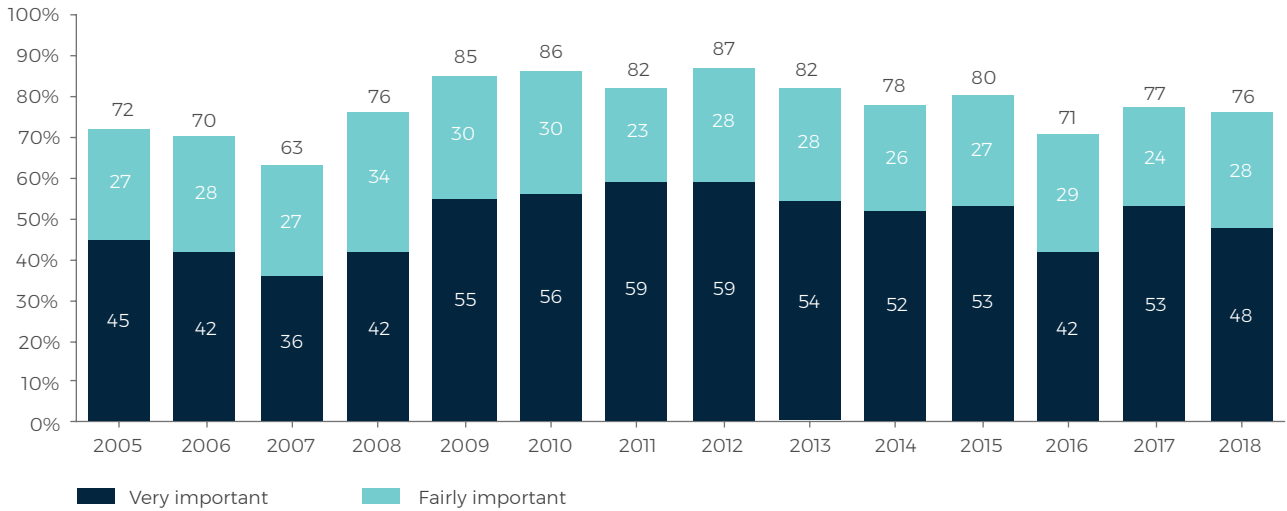
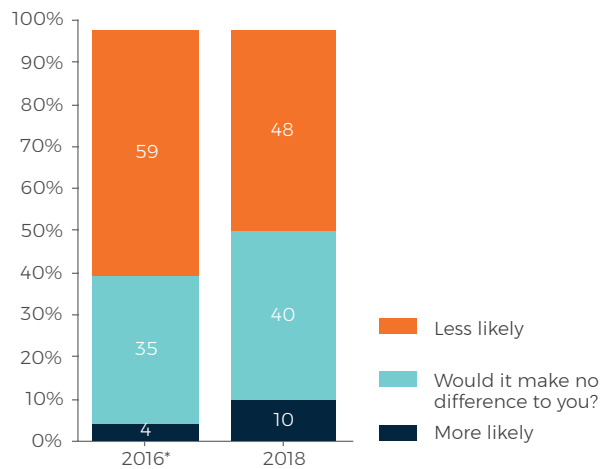


Fig 4: Joint military action with the US under Donald Trump

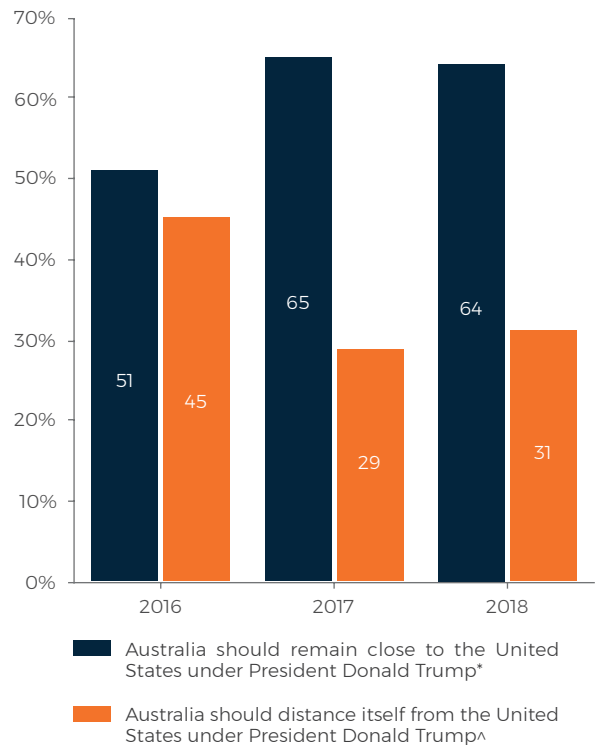
Now about Australia joining with the US in future military action. Now that Donald Trump is president of the United States, are you personally more likely or less likely than you were previously, to support Australia taking future military action in coalition with the US under Donald Trump, or does it make no difference to you?



* This question was first asked in a 2016 poll of 1002 Australian adults conducted between 1 and 9 June 2016 by Field Works Market Research on behalf of the Lowy Institute. The 2016 question wording was: ‘Now about Australia joining with the US in future military action. If Donald Trump becomes president of the United States, would you personally be more likely or less likely than you are now, to support Australia taking future military action in coalition with the US under Donald Trump, or would it make no difference to you?’

Fig 5: Australia-US relations and Donald Trump

Now that Donald Trump is President of the United States, which one of the following statements comes closest to your personal view:



* 2016: Australia should remain close to the United States regardless of who is elected US President

^ 2016: Australia should distance itself from the United States if it elects a president like Donald Trump

Threats to Australia

Terrorism and North Korea’s nuclear program are seen as the leading threats to Australia when we ask Australians about a range of possible ‘threats to the vital interests of Australia in the next ten years’. Two thirds of Australians (66%) say that ‘international terrorism’ is a ‘critical threat’ to the vital interests of Australia in the next ten years, and the same number say ‘North Korea’s nuclear program’ is a critical threat. Climate change is the next highest ranked threat, with 58% seeing it as a critical threat; this is similar to the proportion (57%) who saw it as a critical threat in 2017, and 12 points higher than the result in 2014. The threat of cyberattacks from other countries continues to cause Australians some concern, with 57% seeing it as a critical threat. The prospect of a global economic downturn is seen as a critical threat by half (50%) of Australians. Despite his unpopularity, Donald Trump’s presidency is regarded as a critical threat by a minority of the population (42%).

Lower ranked are the threats posed by ‘large numbers of immigrants and refugees coming into Australia’ (40% saying ‘critical threat’), ‘US foreign policies’ (36%), and ‘China’s growing power’ (36%). However, the threat of

a rising China is perceived differently by Australians of different generations. While China’s growing power does not alarm most Australians, a majority (52%) of older Australians aged over 60 see it as a critical threat to the nation’s interests.

Foreign interference in Australian politics

Since 2017, there has been a lively public debate about the threat of foreign interference in Australia’s political processes, with revelations of connections between wealthy Chinese donors and Australian politicians.² Despite the intensity of this debate, Australians do not appear to be particularly concerned about the possibility that such connections are a threat to Australian democracy. ‘Foreign interference in Australian politics’ is seen as a ‘critical threat’ by a minority (41%) of Australians. It ranks lower in threat perceptions than terrorism (66%), North Korea’s nuclear program (66%), climate change (58%), the threat of cyberattacks (57%), and the prospect of a global economic downturn (50%).

The public debate in 2017 revolved around the threat of Chinese influence. However, Australians’ concerns

Fig 6: Threats to the vital interests of Australia

I am now going to read out 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.

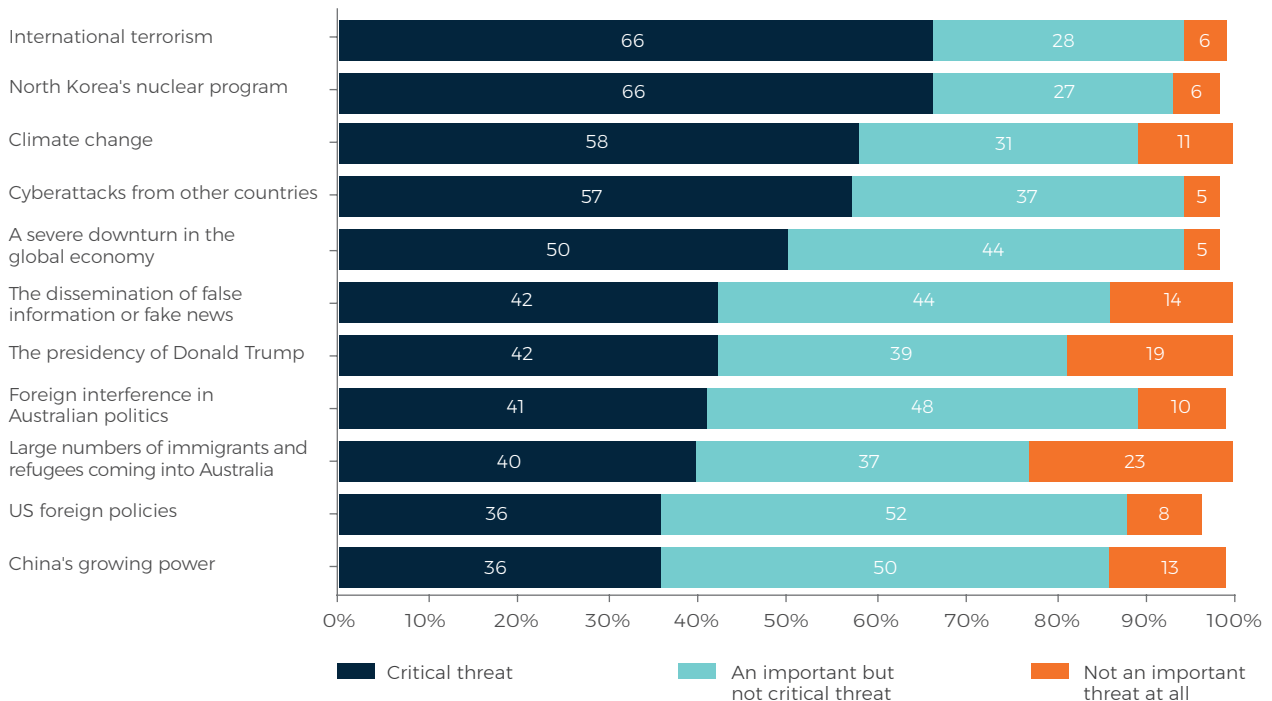
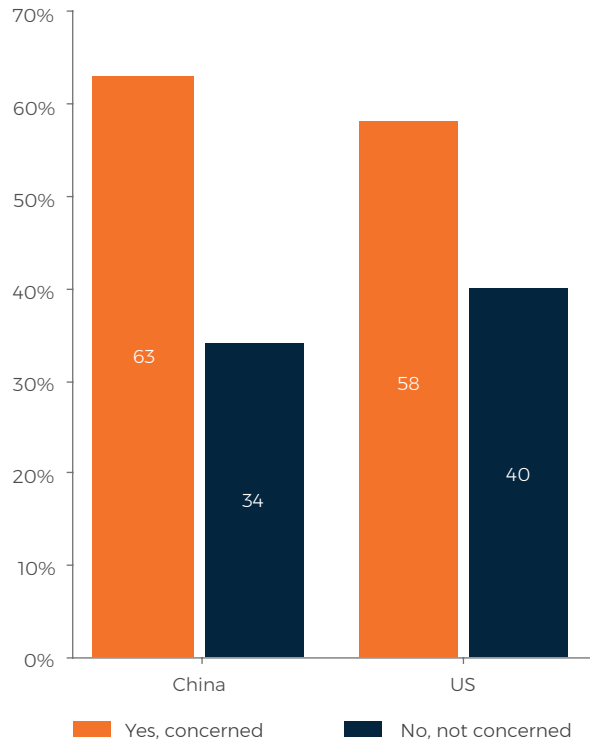


Fig 7: Foreign influence in Australian politics

Now about the issue of foreign influence in Australia’s political processes. Are you personally concerned or not concerned about the influence of each of the following countries on Australia’s political processes?



appear to be focused on foreign influence generally, rather than the threat posed by China specifically. When asked about influence from both China and the United States in Australia’s political processes, only marginally more Australians (63%) expressed concern about China than about the influence of the United States (58%).

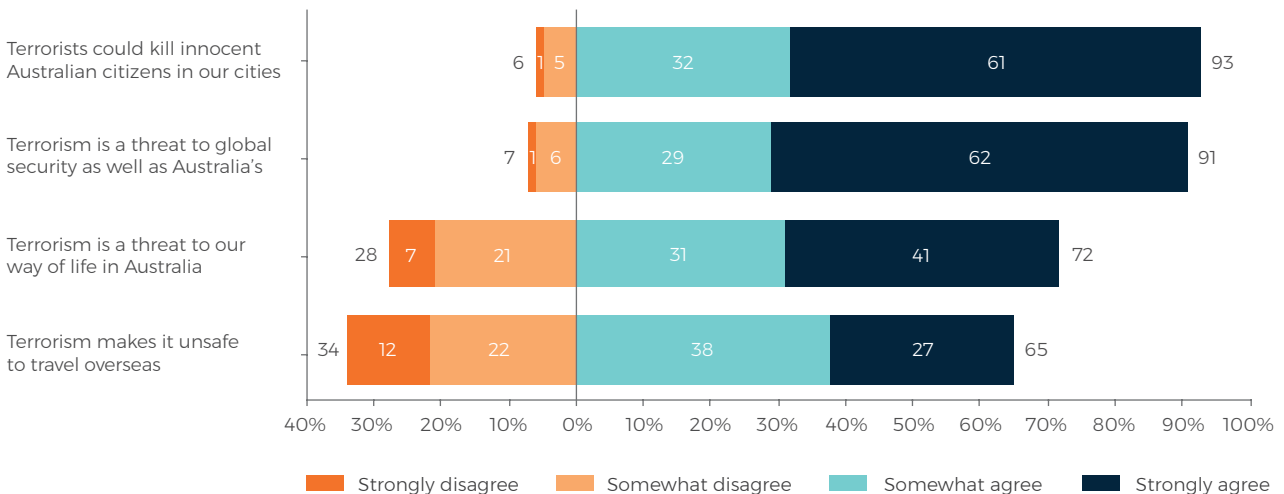
Terrorism

International terrorism has been at the top of the list of Australians’ concerns for most of the history of Lowy Institute polling. On five of the six occasions we have asked Australians about the threats to Australia’s vital interests, terrorism has been the leading or equal highest concern. This year, we sought to understand this better among those respondents who said terrorism was either a ‘critical’ or ‘important but not critical’ threat to Australia’s vital interests (1123 of 1200 respondents). Almost all of them see terrorism as a global threat, with 91% agreeing it is a ‘threat to global security as well as Australia’s’. Incidents such as the Martin Place siege in late 2014 and the Parramatta shooting in 2015 may have heightened fears of home-grown terrorism: 93% of the respondents agree that terrorism is a threat because ‘terrorists could kill innocent Australian citizens in our cities’. Around three-quarters (72%) say ‘terrorism is a threat to our way of life in Australia’. Fewer (65%) say ‘terrorism makes it unsafe to travel overseas’.

To put these fears in context, our Poll results show that Australians feel less safe than in the past. In 2018, 78% say they feel either ‘very safe’ or ‘safe’. This is the lowest level measured since 2005, when 91% felt safe.

Fig 8: Threat of terrorism

Here are some different statements about why terrorism might be a threat to Australia’s vital interests. For each one please say whether you personally agree or disagree it is a reason why terrorism might be a threat to Australia’s vital interests.



China

Over the course of Lowy Institute polling, Australians have expressed a complex range of attitudes towards China. On the one hand, China is Australia’s largest trading partner and an important contributor to Australia’s prosperity. On the other hand, many Australians are wary of China and its intentions.

Chinese investment

This year, there has been a sharp rise in the proportion of the Australian population who say the Australian government is ‘allowing too much investment from China’. Almost three-quarters (72%, up from 56% in 2014) now take this view.

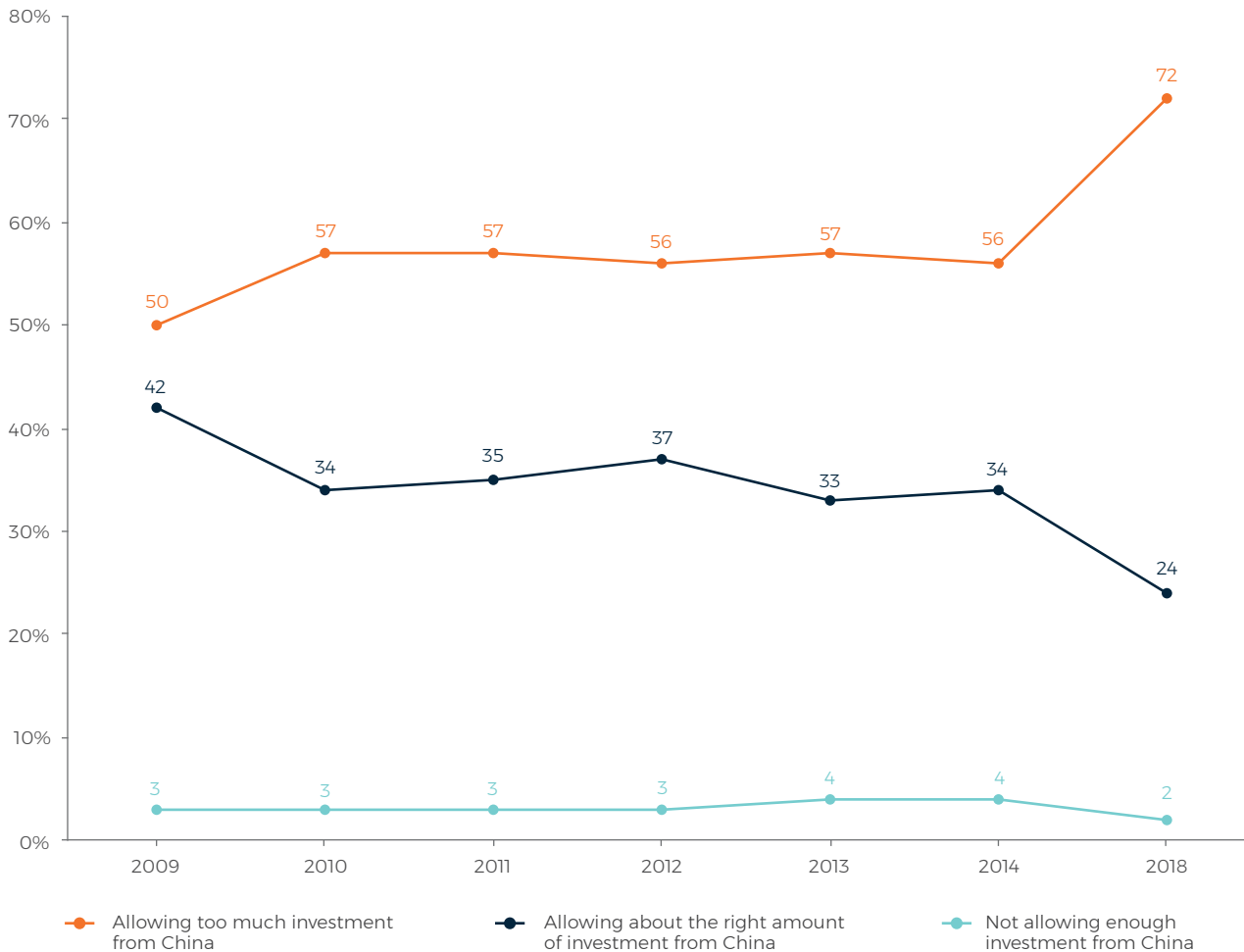
Lowy Institute polling in the past has identified three areas of foreign investment which appear to disturb

Australians the most: agriculture, residential real estate, and critical infrastructure such as ports and airports. Australians have been wary of Chinese investment in residential real estate, with 70% responding in our 2015 Poll that the Australian government allows too much investment from China in residential real estate.

Foreign investment in agriculture also causes widespread concern, with 87% of Australians saying in 2016 they were against ‘the Australian government allowing foreign companies to buy Australian farmland’. Finally, in our 2014 Poll, 60% of Australians were against the ‘Australian government allowing foreign companies to invest in ports and airports’. That poll presaged Treasurer Scott Morrison’s decision in 2016 to block the sale of NSW electricity provider Ausgrid to a consortium of Chinese state-owned and Hong Kong corporations, the blocking of the Kidman cattle station sale to Chinese buyers in late 2015,³

Fig 9: Chinese investment

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



and the lease of the Darwin port facility to Chinese firm Landbridge. The government has since announced new rules on the sale of electricity assets to foreign companies, and new conditions have also been imposed on the sale of agricultural land.⁴

China as a military threat

This year, as in eight consecutive years previously, a significant proportion of the Australian population sees China as a potential military threat to Australia in the future. In 2018, 46% of Australians say it is likely that ‘China will become a military threat to Australia in the next 20 years’.

The primary reason for this wariness is the perception that Australia may be drawn into a conflict between the United States and China in the region. When asked why they ‘personally think China will become a military threat to Australia in the next 20 years’, 77% of those

who see China as a likely military threat agree with the statement that ‘China and the United States are likely to come into conflict in the future and Australia will end up being drawn into the conflict through its alliance with the United States’. Seven in ten (70%) agree that ‘China’s recent actions have been assertive and suggest it is going to be a militarily aggressive power’. Fewer, but still a majority (65%), agree that ‘China has been expanding and modernising its military, suggesting it is preparing for conflict’.

China as an economic partner

Despite perceptions of the possible threat posed by China, most Australians see it far more as an economic partner than a military threat. More than eight in ten (82%) Australians now say that China is ‘more of an economic partner’. This is three points higher than in 2017, and five points higher than in 2015. Only 12% say China is ‘more of a military threat’.

Fig 10: China as a military threat

Do you think it is likely or unlikely that China will become a military threat to Australia in the next 20 years?

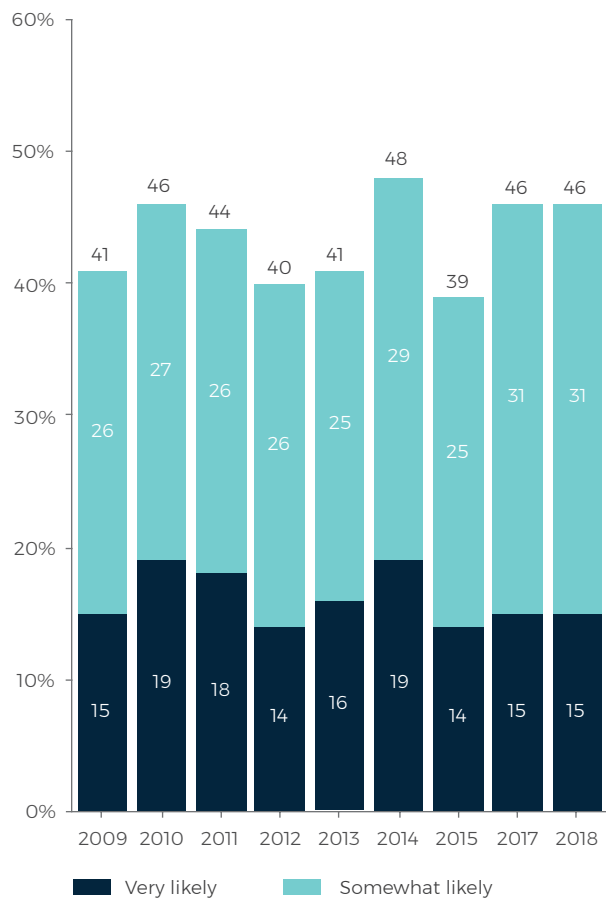


Fig 11: China – economic partner or military threat?

In your own view, is China more of an economic partner to Australia or more of a military threat to Australia?

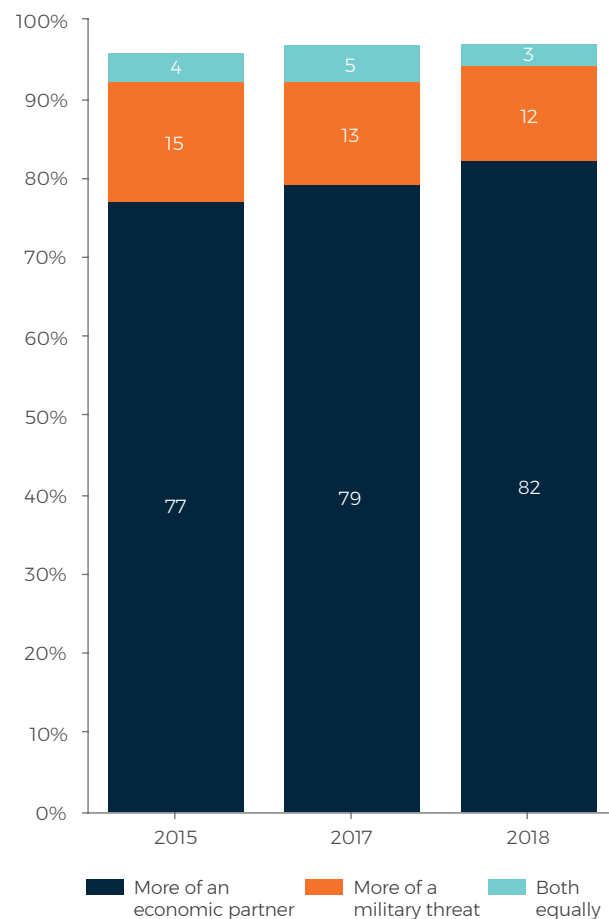
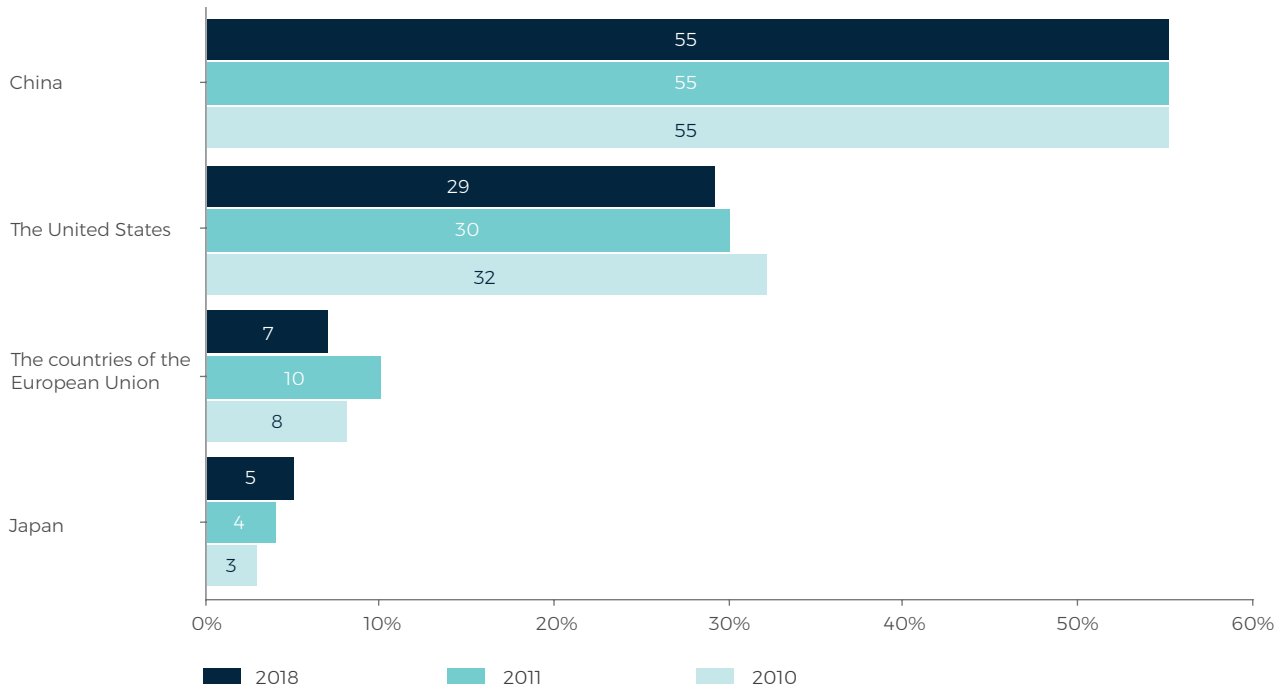


Fig 12: World's leading economic power

Now about the world's leading economic power. Today, which one of the following do you think is the world's leading economic power?



World's leading economic power

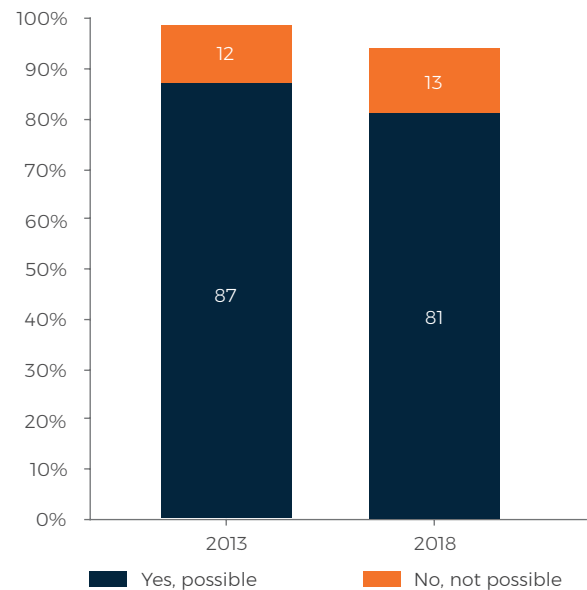
Australians' embrace of China as an economic partner probably stems from their perception of it as a global economic powerhouse. More than half (55%) think China is the 'world's leading economic power', with just 29% seeing the United States as the leading economy. Very few (7%) say 'the countries of the European Union' are the world's leading economic power, although the European Union has the second-largest GDP, on an exchange rate basis, after that of the United States and ahead of China.⁵

China and the United States

At a time when the United States and a rising China are fast becoming strategic competitors in the region, there is an increasing debate about whether Australia will eventually be forced to choose between the United States, as its alliance partner, and China, as its largest trading partner. However, around eight in ten (81%) Australians would disagree, saying it is 'possible for Australia to have a good relationship with China and a good relationship with the United States at the same time'. While this is a six-point drop from the 87% who said this in 2013, it remains a very strong majority. Only 13% say it is not possible for Australia to maintain good relationships with both.

Fig 13: Australia, China and the United States

Now about Australia's relationships with China and the United States. Do you think it is possible or not possible for Australia to have a good relationship with China and a good relationship with the United States at the same time?



Climate change

Attitudes about climate change have been undergoing a dramatic reversal over the past six years. The number of Australians who saw global warming as a ‘serious and pressing problem’ about which ‘we should begin taking steps now even if this involves significant costs’ fell from 68% in 2006 to 36% in 2012. Since then, however, concern about global warming has been rising steadily. In 2018, almost six in ten Australians (59%) say global warming is ‘a serious and pressing problem’, up five points since 2017 and 23 points since 2012.

The issue of climate change and global warming continues to split Australians along generational lines. While a clear majority (70%) of younger Australians aged 18–44 see ‘global warming’ as a ‘serious and pressing problem’, just less than half (49%) of their elders have the same level of concern.

Renewables vs coal

Power shortages in the southern states in early 2017 during heatwaves and storms, combined with the closure of the Hazelwood coal-fired power station in March 2017 and the proposed decommissioning of AGL’s Liddell coal-fired station in 2022, provoked a fierce debate about energy security in Australia during 2017. Later in

Fig 15: Renewables and energy supply

I am going to read some statements about renewable energy and energy supply. Please say which one of these statements comes closest to your own point of view:

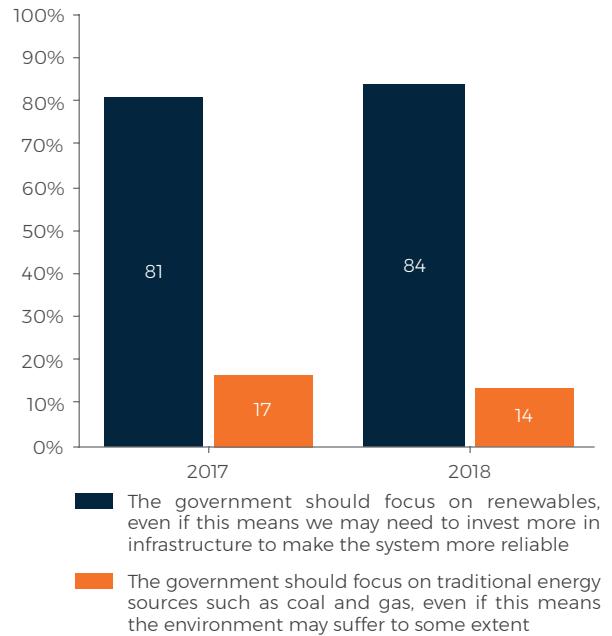
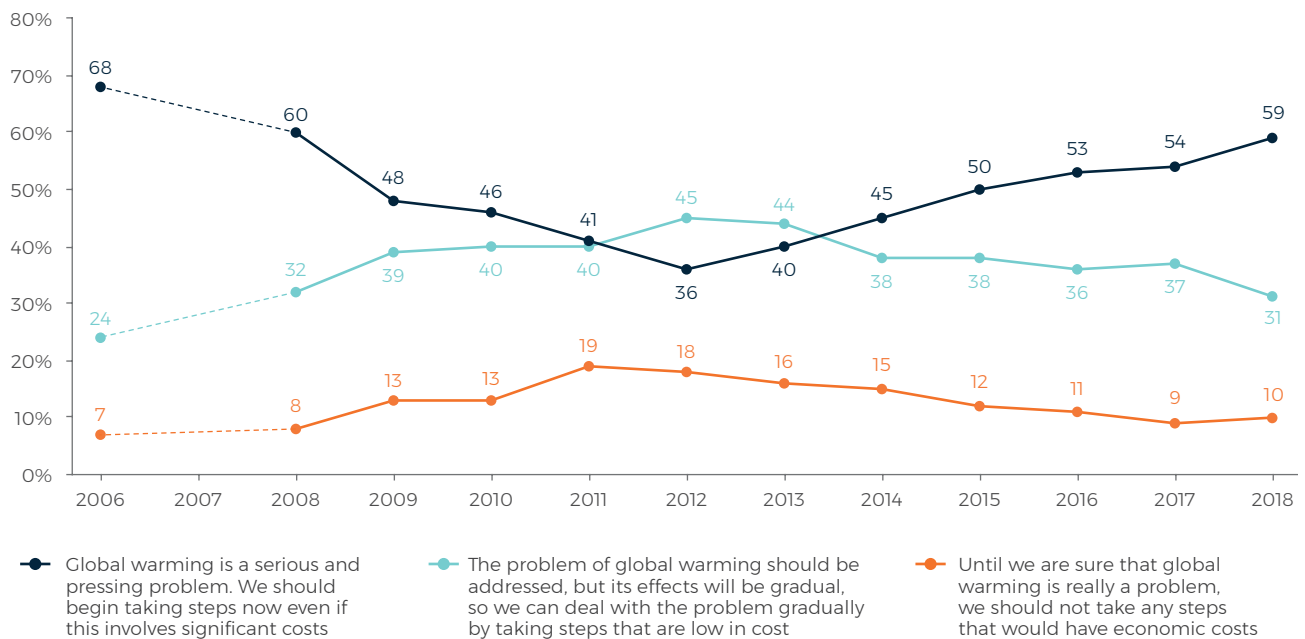


Fig 14: Global warming

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. I’m going to read you three statements. Please tell me which statement comes closest to your own point of view.



the year, the Australian government put forward a new framework for energy policy, the National Energy Guarantee, with the aim of delivering a reliable, affordable energy supply. More recently, the Minister for Energy, Josh Frydenberg, has argued publicly that the sale, rather than closure, of the Liddell station would be ‘in the public interest’.⁶

Despite the debate and political rhetoric, most Australians have not been persuaded to support coal over renewables for the nation’s energy security. Almost all Australians remain in favour of renewables, rather than coal, as an energy source. In 2018, 84% (up three points since 2017) say ‘the government should focus on renewables, even if this means we may need to invest more in infrastructure to make the system more reliable’. Only 14% say ‘the government should focus on traditional energy sources such as coal and gas, even if this means the environment may suffer to some extent’. Even among those who take the most sceptical view about global warming (the 10% who say ‘until we are sure that global warming is really a problem, we should not take any steps that would have economic costs’), 40% favour a focus on renewables. Nine in ten of the rest

support a focus on renewables rather than coal, as do 72% of Liberal-National Party supporters.

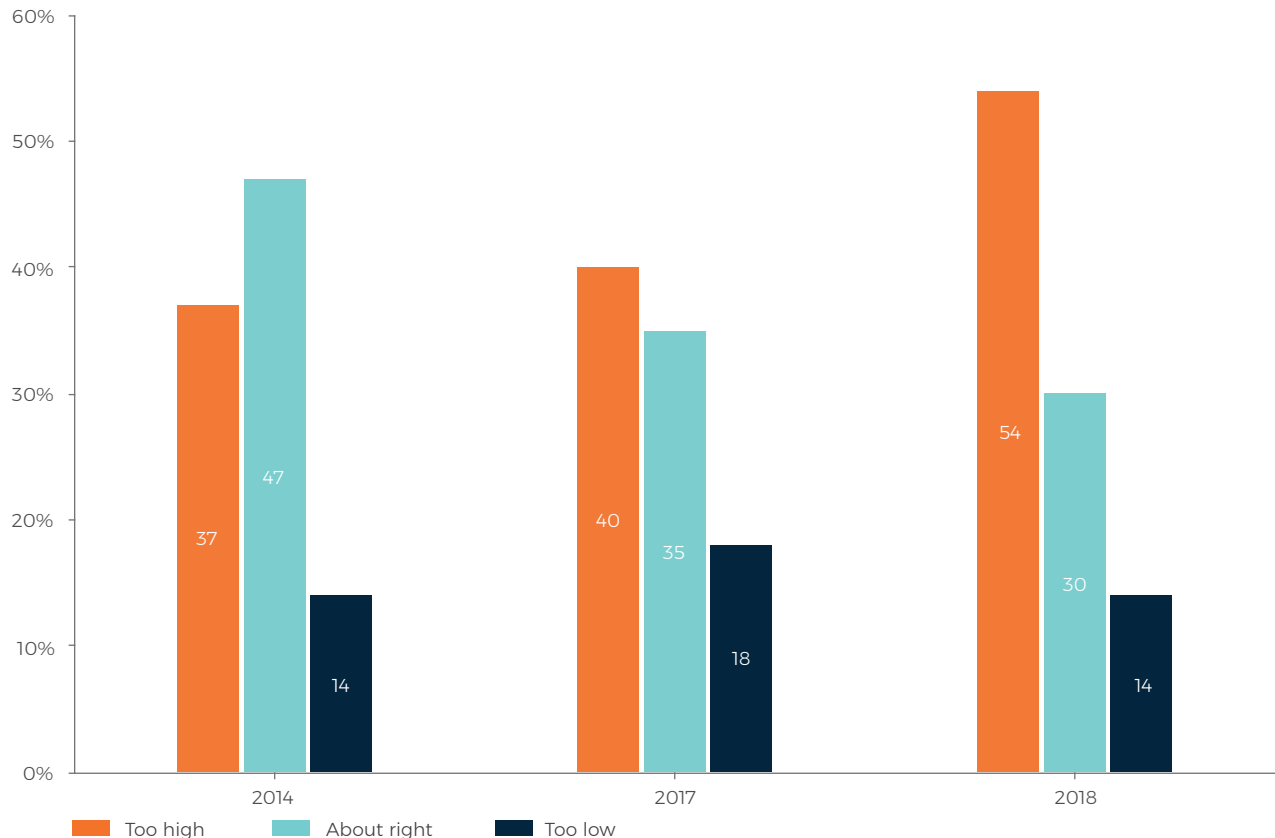
These attitudes are consistent with previous findings of the Lowy Institute Poll on Australians’ preference for alternative energy sources. In 2016, most Australians (88%) agreed that ‘the use of fossil fuels is in decline around the world and Australia should invest more in alternative energy sources or risk being left behind’. Only 53% agreed (45% disagreed) that ‘Australia has an abundant supply of fossil fuels and we should continue to use and export them to keep our economy strong’.

Immigration and national identity

For the first time, the Lowy Institute Poll has found that a majority of Australians oppose the current rate of immigration to Australia. In 2018, 54% of Australians say that ‘the total number of migrants coming to Australia each year is too high’. A minority (44%), say it is either ‘about right’ (30%) or ‘too low’ (14%). These results represent a significant rise in opposition to the existing migration rate – up 14 points since last

Fig 16: 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?



year, and up 17 points since we first asked this question in 2014.

Australians have been generally positive about the benefits of immigration in the past. In 2016, almost three-quarters of Australians agreed that ‘overall, immigration has a positive impact on the economy’, and that ‘accepting immigrants from many different countries makes Australia stronger’.

In 2018, attitudes appear to have shifted. While they may remain positive about the contribution of migrants, Australians are expressing unease about immigration rates. This shift may reflect the rhetoric of politicians such as former prime minister Tony Abbott, who advocated in a speech in February 2018 (just before fieldwork for the Poll commenced) for cuts to the immigration rate to ease pressure on infrastructure, house prices, and wages.⁷

Australians also appear to be questioning the impact of immigration on the national identity. A majority (54%) say ‘Australia’s openness to people from all over the world is essential to who we are as a nation’. However, a substantial minority (41%), say ‘if Australia is too open to people from all over the world, we risk losing our identity as a nation’. Attitudes vary according to age: 66% of younger Australians aged 18–44 say Australia’s openness is essential, compared with only 41% of those over 45.

Australians are more divided on this question than Americans, who responded to the same question in late 2017 with only 29% saying that ‘if America is too open ... we risk losing our identity as a nation’.⁸

Australia’s aid budget

Australians have very inflated perceptions of the size of Australia’s aid budget. In a question first presented in 2011, we asked Australians this year what percentage of the Australian federal budget they think is ‘actually spent on foreign aid’, and what percentage they think ‘should be spent on foreign aid’.

In 2018, Australia’s aid budget is \$3.9 billion, which is approximately 0.8% of the federal budget. However, this year’s Poll finds that on average, Australians think that 14% of the budget is actually spent on aid, while they think 10% of the budget should be spent on aid. More than one in five (21%) say that 20% or more of the budget is directed to aid. Very few Australians estimate the amount of the aid budget correctly, with only 6% saying that less than 1% of the Australian federal budget is actually spent on aid.

In 2011, Australians similarly overstated the aid budget expenditure, estimating on average that 16% of the federal budget was spent on aid, at a time when the government’s expenditure on aid was in fact \$4.3 billion, or around 1.2% of the budget.

Fig 17: Immigration and national identity

Next, just tell me whether the first statement or the second statement comes closer to your own views.

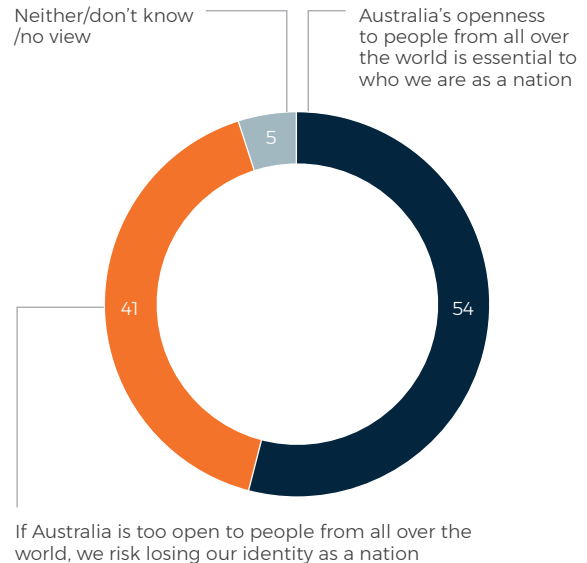
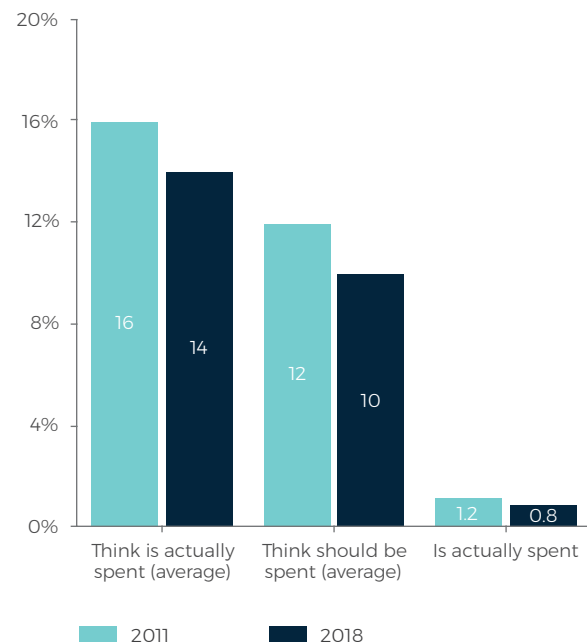


Fig 18: Australia’s aid budget

Just based on what you know, please tell me your hunch about what percentage of the Australian Federal budget you think is actually spent on foreign aid. And in your view, what percentage of the Australian Federal budget, if any, do you personally think should be spent on foreign aid?



Papua New Guinea

Papua New Guinea is the largest recipient of Australian aid, receiving \$546 million in the 2017/18 financial year. Australians are divided, however, on the effectiveness of that aid: 37% agree that ‘Australian aid to Papua New Guinea has little impact on life in Papua New Guinea’, while 45% disagree. That does not mean that Australians believe they have no responsibilities towards Papua New Guinea. Three-quarters (76%) say that ‘stability in Papua New Guinea is important to Australia’s national interest’, and a similar proportion (77%) say ‘Australia has a moral obligation to help Papua New Guinea’.

The Manus Island detention centre has been a contentious political issue and a frequent topic of debate in Australia. A majority of Australians (59%) say ‘Australia’s relationship with Papua New Guinea has been damaged because of the Manus Island detention centre’.

They are uncertain about Papua New Guinea’s economic future, with 34% agreeing and 46% disagreeing that it has ‘strong economic prospects’.

Attitudes to Indonesia

Over the fourteen years of the Lowy Institute Poll, we have asked Australians a number of questions about Indonesia, and their attitudes have illustrated a lack of awareness about aspects of Indonesian culture and politics. For example, when asked in 2015 whether they admired Indonesia’s President Joko Widodo, 47% of Australians were unable to answer.

A persistent result in our polling has been Australians’ belief that Indonesia is not a democracy. In 2018, only 24% of Australians agree that Indonesia is a democracy – three points lower than in 2017 (although more Australians this year, 26%, were not able to answer this question).

Australians are also uncertain about Indonesia’s commitment to fighting terrorism: 44% agree (while 44% disagree) that ‘Indonesia is a dangerous source of terrorism’, while 32% agree (41% disagreeing) that ‘The Indonesian government has worked hard to fight terrorism’.

Not all attitudes to Indonesia are characterised by uncertainty or negativity. A majority of Australians (58%) agree that Indonesia is an important economy to Australia.

Fig 19: Papua New Guinea

Please say whether you personally agree or disagree with each of the following statements:

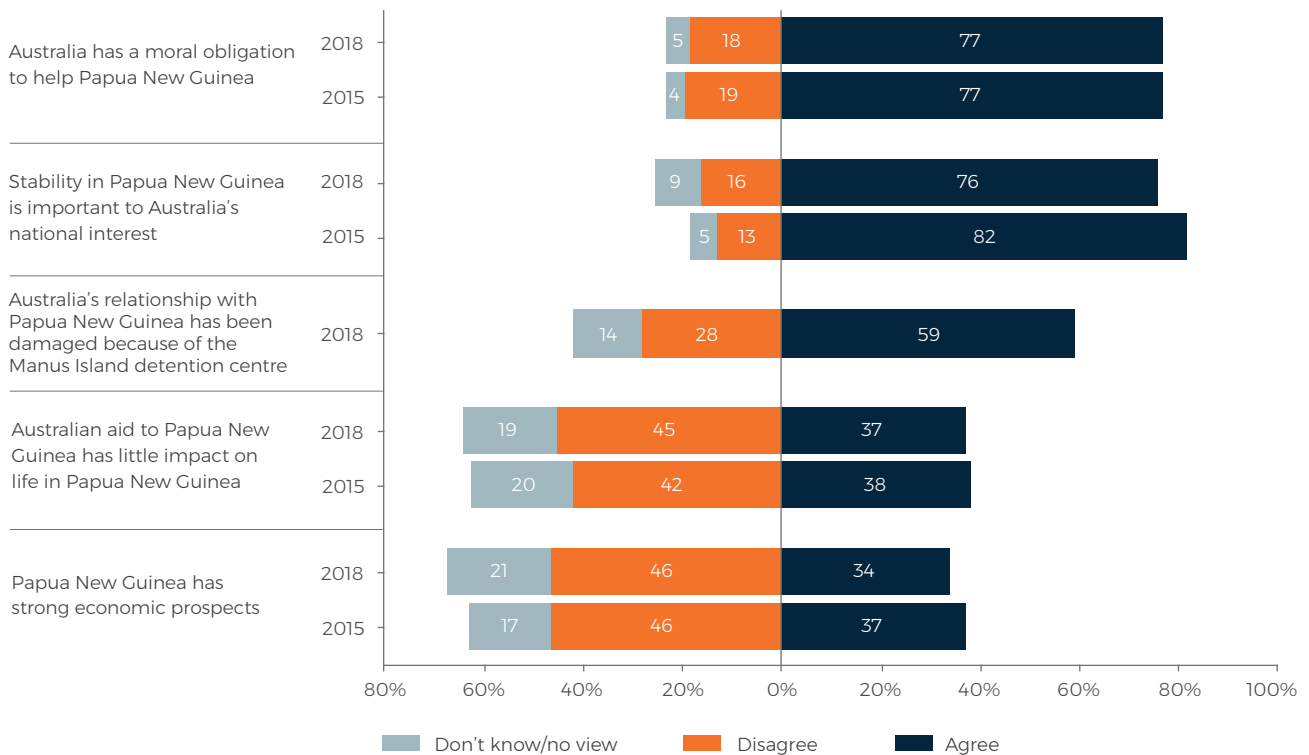
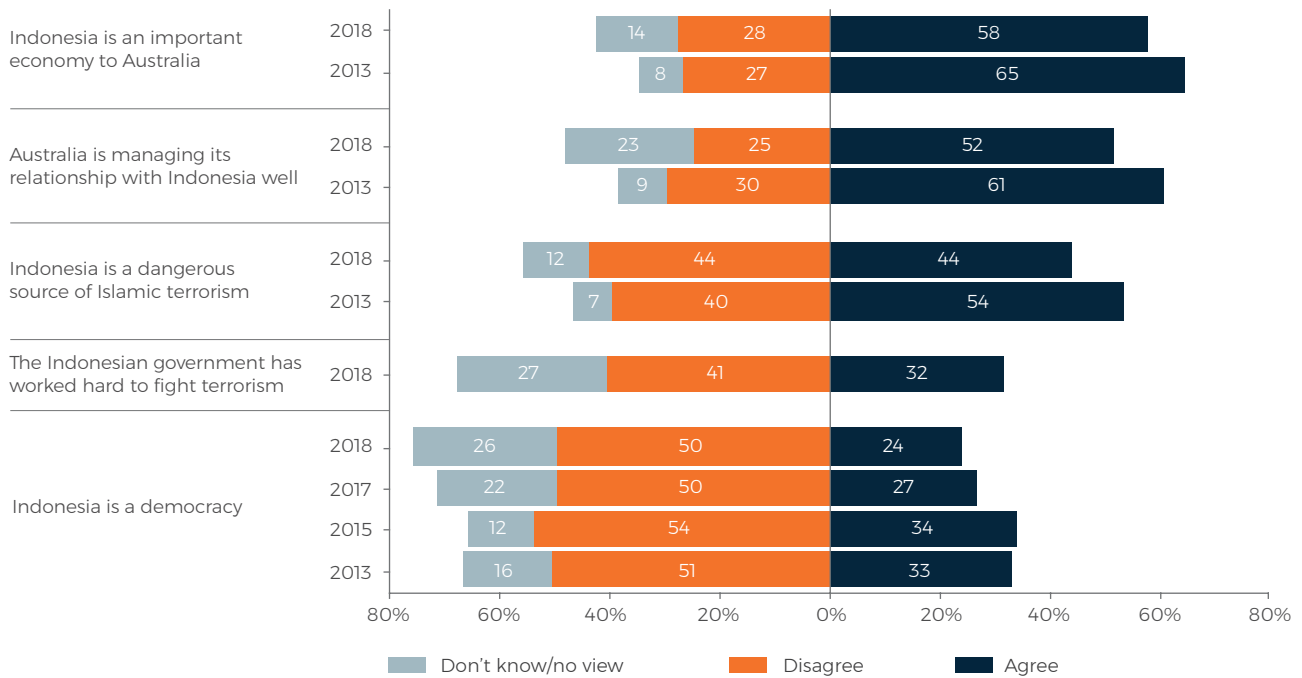


Fig 20: Indonesia

I am going to read out a number of statements about Indonesia. For each one please say whether you personally agree or disagree.



After a difficult period in relations following Indonesia’s execution of two Australian citizens in 2015, a majority of Australians (52%) now say that ‘Australia is managing its relationship with Indonesia well’ (25% disagree).

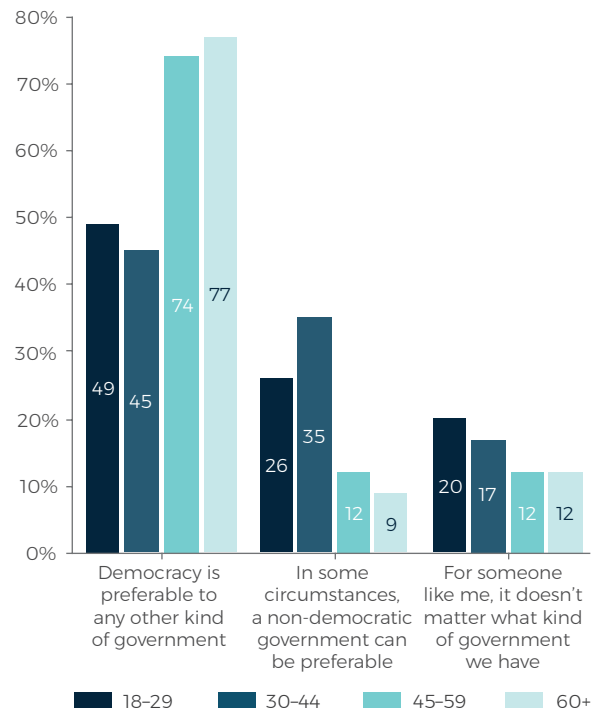
Democracy

Since 2012, the Lowy Institute Poll has included a question, asked by the Pew Research Center in a number of other countries, to determine Australians’ attitudes to democracy in this country. The results have been consistent and thought-provoking. This year, in a result almost identical to those in earlier years, 62% of Australians say ‘democracy is preferable to any other kind of government’. One in five (20%) say ‘in some circumstances, a non-democratic government can be preferable’, and 15% say that ‘for someone like me, it doesn’t matter what kind of government we have’.

In earlier years, the responses of younger Australians belonging to ‘Generation Y’ (those born between approximately 1980 and the mid-1990s) suggested that this age group felt quite differently about democracy than their elders. In 2012, only 39% of these young Australians, then aged 18–29 years, expressed a preference for democracy. This year, it is the response of a broader group aged 18–44 years which differs from older Australians: only 47% of that group say democracy is preferable, compared with 76% of those aged 45 and older.

Fig 21: Value of democracy

Please say which one of the three statements comes closest to your own personal views about democracy.



Feelings towards other countries

Every year, the Lowy Institute Poll includes a question about how Australians feel towards a range of countries across the world. The ‘feelings thermometer’ asks Australians to rate their feelings on a scale of 0–100°, where 0° is very cold and unfavourable, and 100° is very warm and favourable.

This year, for the first time, we have included in the same ‘thermometer’ question the three nations Australians have felt most warmly towards in the past: New Zealand, the United Kingdom, and Canada. Each is very warmly regarded, and the separation between them is almost insignificant. New Zealand tops the list at 86°, followed by Canada at 84°. Australians’ warm feelings towards the United Kingdom (82°) are unaffected by the Brexit vote, and are several degrees warmer than they were a decade ago.

Not all English-speaking countries receive this very high degree of warmth from Australians. The United States sits at a cooler 67°, although still on the warm side of the thermometer. This is consistent with its result in 2016 and 2017, although cooler than that between 2011 and 2015, when it registered a warmer 70–73°.

Feelings towards the European Union warmed this year by five points, to 67°, while feelings towards Germany (71°) and France (70°) remain steady.

Japan registered a three-point rise this year to 74°. However, feelings towards other Asian countries are cooler. South Korea sits at 62°. China’s result of 58° is consistent with that of earlier years, as are feelings towards Indonesia (54°), the Philippines (61°), and Taiwan (60°).

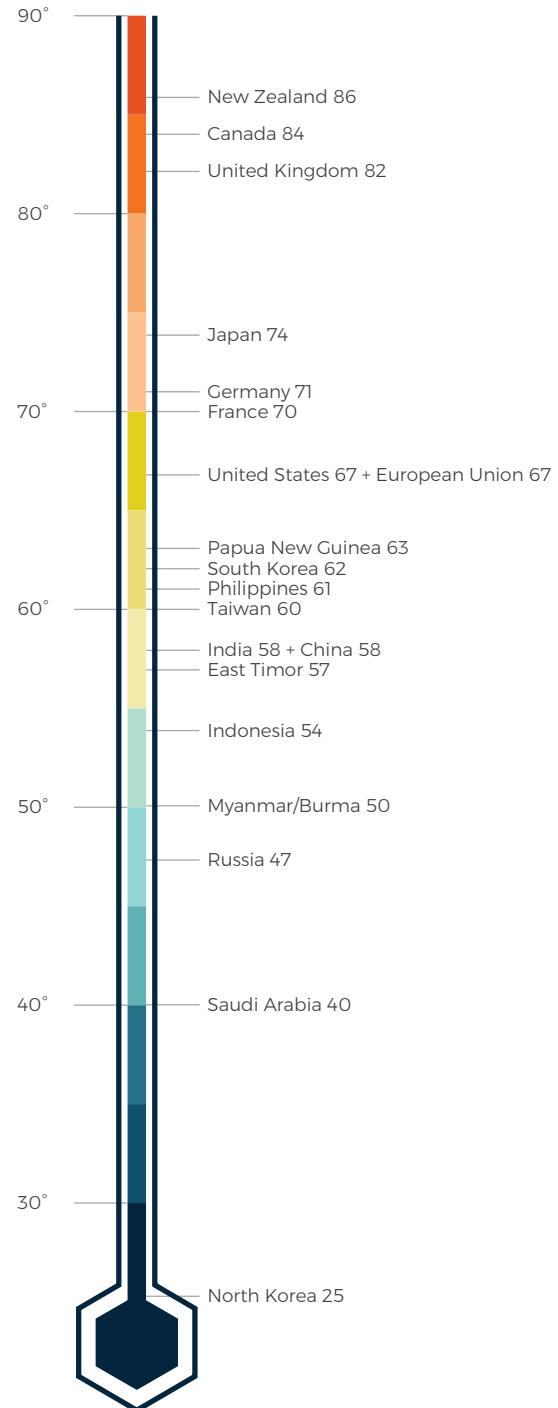
The Rohingya crisis appears to have affected attitudes to Myanmar, for which feelings have cooled four points to 50° – neither warm nor cold.

Closer to home, feelings towards Papua New Guinea are at a warmish 63°, and East Timor has registered a slightly cooler 57° (down from 60° in 2016).

Feelings towards Russia are cool at 47°. Saudi Arabia was included on the thermometer for the first time this year, ranking second lowest at 40°. North Korea again receives Australians’ coldest feelings, down five points to a frosty 25°.

Fig 22: Feelings thermometer

Please rate your feelings towards some countries, 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 towards that country. If you have no opinion or have never heard of that country, please say so.



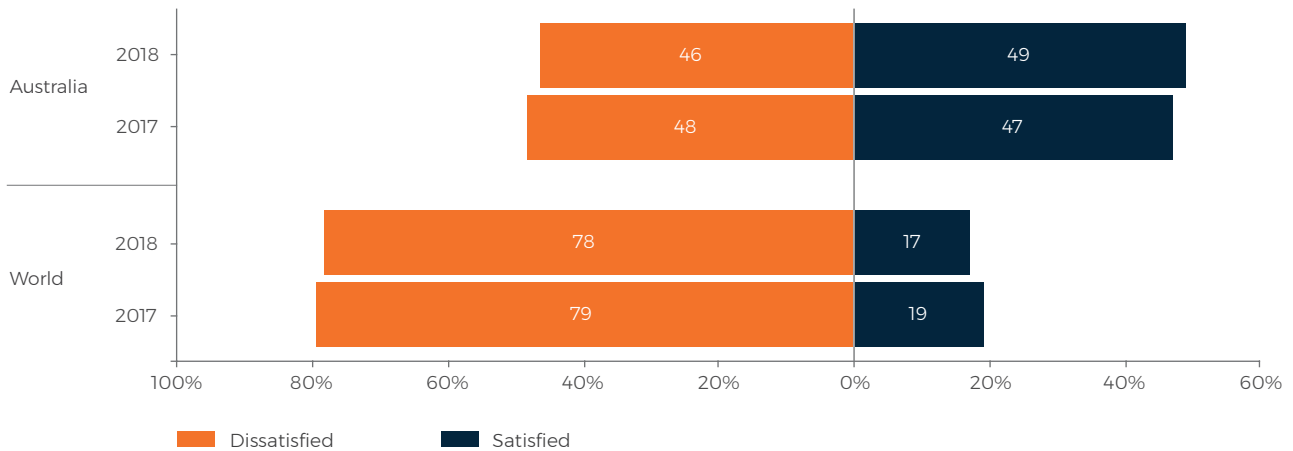
Direction of the world and the nation

After a series of global political changes, including the United Kingdom’s vote to leave the European Union and the election of US President Donald Trump, as well as an escalation of conflict in the Middle East and a rise in terrorist incidents in the West, Australians continue to be troubled about the direction of the world. Only 17% say they are ‘satisfied with the way things are going in the world today’, while 78% are dissatisfied. These results are almost identical to those last year.

Around half (49%) of the adult population say they are ‘satisfied’ with ‘the way things are going in Australia today’, and 46% say they are ‘dissatisfied’, suggesting Australians are less disturbed about the direction of their country than they are about the rest of the world. One Nation supporters are a significant factor in this result: they are the only group in which a majority (73%) say they are dissatisfied with the direction of the nation. More supporters of other major parties – Liberal-Nationals, Labor, and the Greens – are satisfied (55%) than dissatisfied (41%) with the way things are going in Australia today.

Fig 23: Direction of the nation and the world

Overall, are you satisfied or dissatisfied with the way things are going in Australia today? And turning to the situation in the world overall, are you satisfied or dissatisfied with the way things are going in the world today?



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. Responses of 'don't know', 'no view', 'none', and similar were recorded if given by respondents, but not offered. Throughout the tables, an '**' represents a response given by less than 0.5% of people.

In 2018 the poll fieldwork methodology differed from previous years, using a combined sample of 600 telephone responses and 600 online responses. See page 36 for further details.

1. Trust in global powers

Table 1: How much do you trust the following countries to act responsibly in the world?

2018# (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 Kingdom	45%	45%	90%	7%	3%	10%	1%
Japan	33%	54%	87%	9%	4%	13%	1%
France	30%	54%	84%	10%	5%	15%	1%
India	8%	51%	59%	29%	11%	40%	1%
United States	15%	40%	55%	29%	15%	44%	1%
China	7%	45%	52%	36%	12%	48%	1%
Russia	3%	25%	28%	44%	27%	71%	2%
North Korea	1%	7%	8%	29%	61%	90%	1%

	A great deal						Total: 'a great deal' and 'somewhat' (ranked by 2018# %)					
	2006	2008	2009	2011	2017	2018#	2006	2008	2009	2011	2017	2018#
United Kingdom	-	-	-	-	50%	45%	-	-	-	-	90%	90%
Japan	19%	15%	33%	30%	31%	33%	73%	68%	81%	83%	86%	87%
France	-	-	-	-	-	30%	-	-	-	-	-	84%
India	9%	8%	10%	7%	9%	8%	68%	55%	61%	61%	64%	59%
United States	19%	24%	39%	40%	20%	15%	60%	69%	83%	83%	61%	55%
China	7%	7%	7%	12%	8%	7%	60%	47%	59%	60%	54%	52%
Russia	-	7%	7%	7%	5%	3%	-	53%	59%	53%	38%	28%
North Korea	-	-	-	-	1%	1%	-	-	-	-	12%	8%

2. Confidence in world leaders

Table 2: 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.

2018# (ranked by total who have 'a lot of' and 'some' confidence)

	A lot	Some	Total: a lot and some confidence	Not too much	None at all	Total: not too much confidence and none at all	Not sure who the person is	Don't know /no view
UK Prime Minister Theresa May	21%	47%	68%	22%	5%	27%	5%	1%
Japanese Prime Minister Shinzo Abe	20%	46%	66%	15%	4%	19%	12%	4%
Australian Prime Minister Malcolm Turnbull	18%	45%	63%	22%	14%	36%	*	1%
French President Emmanuel Macron	17%	44%	61%	19%	6%	25%	10%	4%
Chinese President Xi Jinping	7%	36%	43%	28%	16%	44%	11%	3%
Indian Prime Minister Narendra Modi	4%	33%	37%	29%	10%	39%	19%	6%
US President Donald Trump	7%	23%	30%	30%	40%	70%	1%	*
Russian President Vladimir Putin	6%	13%	19%	34%	44%	78%	2%	1%
North Korean leader Kim Jong-un	2%	3%	5%	15%	79%	94%	1%	1%

3. US alliance

Table 3: 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#
Very important	45%	42%	36%	42%	55%	56%	59%	59%	54%	52%	53%	42%	53%	48%
Fairly important	27%	28%	27%	34%	30%	30%	23%	28%	28%	26%	27%	29%	24%	28%
Total: very and fairly important	72%	70%	63%	76%	85%	86%	82%	87%	82%	78%	80%	71%	77%	76%
Somewhat important	20%	22%	27%	20%	12%	12%	15%	12%	16%	17%	16%	22%	18%	20%
Not at all important	7%	8%	9%	4%	2%	2%	3%	1%	3%	4%	4%	7%	4%	4%
Don't know/no view	1%	1%	1%	-	*	*	*	*	*	*	1%	1%	1%	1%

4. Donald Trump and Australia–US relations

Table 4: Now that Donald Trump is President of the United States, which one of the following statements comes closest to your personal view:

	2016 [‡]	2017 [^]	2018 [#]
Australia should remain close to the United States under President Donald Trump	51%	65%	64%
Australia should distance itself from the United States under President Donald Trump	45%	29%	31%
Don't know/no view	4%	6%	4%

[‡] In 2016, the question wording was: 'If a person like Donald Trump were elected President of the United States, which one of the following statements comes closest to your personal view: Australia should remain close to the United States regardless of who is elected US President [or] Australia should distance itself from the United States if it elects a president like Donald Trump.'

[^] In 2017, the question wording was: 'Now that Donald Trump has been elected President of the United States, which one of the following statements comes closest to your personal view: Australia should remain close to the United States under President Donald Trump [or] Australia should distance itself from the United States under President Donald Trump.'

5. Joint military action with United States under President Trump

Table 5: Now about Australia joining with the US in future military action. Now that Donald Trump is President of the United States, are you personally more likely or less likely than you were previously to support Australia taking future military action in coalition with the US under Donald Trump, or does it make no difference to you?

	2016 ⁺	2018 [#]
More likely	4%	10%
Less likely	59%	48%
Makes no difference	35%	40%
Don't know/no view	3%	1%

⁺ This question was first asked in a 2016 poll of 1002 Australian adults conducted between 1 and 9 June 2016 by Field Works Market Research on behalf of the Lowy Institute. The 2016 question wording was: 'Now about Australia joining with the US in future military action. If Donald Trump becomes President of the United States, would you personally be more likely or less likely than you are now, to support Australia taking future military action in coalition with the US under Donald Trump, or would it make no difference to you?'

6. Threats to Australia's vital interests

Table 6: I am now going to read out 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.

Ranked by % saying 'a critical threat'	2018#				
	Critical threat	An important but not critical threat	Total: critical and important threat	Not an important threat at all	Don't know /no view
International terrorism	66%	28%	94%	6%	*
North Korea's nuclear program	66%	27%	93%	6%	1%
Climate change	58%	31%	89%	11%	*
Cyberattacks from other countries	57%	37%	94%	5%	1%
Severe downturn in the global economy	50%	44%	94%	5%	2%
The dissemination of false information or fake news	42%	44%	86%	14%	1%
The presidency of Donald Trump	42%	39%	81%	19%	1%
Foreign interference in Australian politics	41%	48%	89%	10%	1%
Large numbers of immigrants and refugees coming into Australia	40%	37%	77%	23%	*
US foreign policies	36%	52%	88%	8%	4%
China's growing power	36%	50%	86%	13%	2%

Percentage saying 'a critical threat' (ranked by 2018#)^

	2006	2008	2009	2014	2017	2018#
International terrorism	73%	66%	68%	65%	68%	66%
North Korea's nuclear program	-	-	-	-	65%	66%
Climate change ['global warming' from 2006 to 2009]	68%	66%	52%	46%	57%	58%
Cyberattacks from other countries	-	-	-	51%	55%	57%
A severe downturn in the global economy	-	-	-	-	53%	50%
The dissemination of false information or fake news	-	-	-	-	-	42%
The presidency of Donald Trump	-	-	-	-	42%	42%
Foreign interference in Australian politics	-	-	-	-	-	41%
Large numbers of immigrants and refugees coming into Australia	31%	33%	39%	-	-	40%
US foreign policies	-	-	-	26%	37%	36%
China's growing power	-	-	-	-	-	36%

^ The list of threats differs from poll to poll. This list is of all threats included in the 2018 question.

7. Foreign influence in Australian politics

Table 7: Now about the issue of foreign influence in Australia's political processes. Are you personally concerned or not concerned about the influence of each of the following countries on Australia's political processes?

	China	US
Yes, concerned	63%	58%
No, not concerned	34%	40%
Don't know/no view	3%	2%

8. Threat of terrorism

Table 8: Here are some different statements about why terrorism might be a threat to Australia's vital interests. For each one, please say whether you personally agree or disagree it is a reason why terrorism might be a threat to Australia's vital interests.

Asked only of those agreeing that international terrorism is an 'important' or 'critical' threat to Australia's vital interests (1123 respondents).

2018* (ranked by total who 'strongly' and 'somewhat' agree)

	Strongly agree	Somewhat agree	Total: strongly and somewhat agree	Strongly disagree	Somewhat disagree	Total: strongly and somewhat disagree	Don't know /no view
Terrorists could kill innocent Australian citizens in our cities	61%	32%	93%	1%	5%	6%	1%
Terrorism is a threat to global security as well as Australia's	62%	29%	91%	1%	6%	7%	1%
Terrorism is a threat to our way of life in Australia	41%	31%	72%	7%	21%	28%	*
Terrorism makes it unsafe to travel overseas	27%	38%	65%	12%	22%	34%	1%

9. Feeling of safety

Table 9: Now about world events, how safe do you feel?

	2005	2006	2007	2008	2009	2010	2015	2017	2018#
Very safe	30%	30%	40%	35%	44%	42%	24%	20%	18%
Safe	61%	56%	50%	57%	46%	50%	56%	59%	60%
Total: safe	91%	86%	90%	92%	90%	92%	80%	79%	78%
Unsafe	7%	10%	8%	8%	7%	5%	16%	16%	20%
Very unsafe	1%	3%	1%	1%	2%	2%	3%	5%	1%
Total: unsafe	8%	13%	9%	9%	9%	7%	19%	21%	21%
Don't know/no view	1%	*	1%	*	1%	1%	1%	1%	1%

10. Chinese investment

Table 10: And now about Chinese investment in Australia. Overall, do you think the Australian government is:

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

11. China as a military threat

Table 11: Now about China. Do you think it is likely or unlikely that China will become a military threat to Australia in the next 20 years?

	2009	2010	2011	2012	2013	2014	2015	2017	2018#
Very likely	15%	19%	18%	14%	16%	19%	14%	15%	15%
Somewhat likely	26%	27%	26%	26%	25%	29%	25%	31%	31%
Total: likely	41%	46%	44%	40%	41%	48%	39%	46%	46%
Somewhat unlikely	38%	36%	35%	39%	36%	32%	33%	34%	36%
Very unlikely	19%	16%	20%	19%	18%	18%	23%	16%	14%
Total: unlikely	57%	52%	55%	58%	54%	50%	56%	50%	50%
Don't know/no view	3%	2%	1%	3%	4%	2%	5%	5%	5%

12. Reasons China may become a military threat

Table 12: Here are some reasons other people have given as to why China might become a military threat to Australia. For each one, please tell me whether you agree or disagree it is a reason why you personally think China will become a military threat to Australia in the next 20 years.

Asked only of those agreeing it is 'very likely' or 'somewhat likely' that China will become a military threat to Australia in the next 20 years (542 respondents).

	Agree		Disagree		Don't know/no view	
	2011	2018#	2011	2018#	2011	2018#
China and the United States are likely to come into conflict in future and Australia will end up being drawn into the conflict through its alliance with the United States	87%	77%	12%	13%	1%	10%
China's recent actions have been assertive and suggest it is going to be a militarily aggressive power	78%	70%	19%	18%	4%	12%
China has been expanding and modernising its military, suggesting it is preparing for conflict	77%	65%	17%	22%	6%	14%

13. China – economic partner or military threat?

Table 13: In your own view, is China:

	2015	2017	2018#
More of an economic partner	77%	79%	82%
More of a military threat	15%	13%	12%
Both equally~	4%	5%	3%
Neither~	2%	*	*
Don't know/no view~	3%	3%	3%

~ Answers not read out but recorded if offered.

14. World's leading economic power

Table 14: Now about the world's leading economic power. Today, which one of the following do you think is the world's leading economic power?

	2010	2011	2018#
China	55%	55%	55%
The United States	32%	30%	29%
The countries of the European Union	8%	10%	7%
Japan	3%	4%	5%
Another country^	*	*	*
Both^	-	-	*
None^	*	*	2%
Don't know/no view^	1%	1%	2%

^ Answers not read out but recorded if offered.

15. China and US relations

Table 15: Now about Australia's relationships with China and the United States. Do you think it is possible or not possible for Australia to have a good relationship with China and a good relationship with the United States at the same time?

	2013	2018#
Yes, possible	87%	81%
No, not possible	12%	13%
Neither/don't know/no view	1%	7%

16. Climate change and global warming

Table 16: 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. I'm going to read you three statements. Please tell me which statement comes closest to your own point of view.

	2006	2008	2009	2010	2011	2012	2013	2014	2015	2016	2017	2018#
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%
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%
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%
Don't know/refused	1%	*	1%	1%	1%	1%	1%	2%	*	*	*	1%

17. Renewables and energy supply

Table 17: I am going to read some statements about renewable energy and energy supply. Please say which one of these statements comes closest to your own point of view.

	2017	2018#
The government should focus on renewables, even if this means we may need to invest more in infrastructure to make the system more reliable	81%	84%
The government should focus on traditional energy sources such as coal and gas, even if this means the environment may suffer to some extent	17%	14%
Neither^	1%	2%
Don't know/no view^	2%	*

^ Answer not read out but recorded if offered.

18. Immigration rate

Table 18: 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#
Too high	37%	40%	54%
About right	47%	35%	30%
Too low	14%	18%	14%
Total: about right and too low	61%	53%	44%
Don't know/no view	3%	7%	3%

19. Immigration and national identity

Table 19: Next, just tell me whether the first statement or the second statement comes closer to your own views:

	2018#
Australia's openness to people from all over the world is essential to who we are as a nation	54%
If Australia is too open to people from all over the world, we risk losing our identity as a nation	41%
Neither/don't know/no view	5%

20. Australia's aid budget

Table 20: Now about how much of the Australian federal budget you think is spent on foreign aid. Just based on what you know, please tell me your hunch about what percentage of the Australian federal budget you think is actually spent on foreign aid.

And in your view, what percentage of the Australian federal budget, if any, do you personally think should be spent on foreign aid?

	Is actually spent		Should be spent	
	2011	2018#	2011	2018#
0%	*	1%	4%	5%
Less than 1%	6%	5%	3%	4%
From 1% to less than 2%	8%	11%	8%	8%
From 2% to less than 3%	9%	8%	8%	7%
From 3% to less than 4%	5%	4%	4%	3%
From 4% to less than 5%	2%	1%	2%	1%
From 5% to less than 6%	13%	9%	16%	14%
From 6% to less than 10%	3%	2%	5%	1%
From 10% to less than 20%	15%	11%	18%	19%
From 20% to less than 30%	12%	7%	11%	8%
From 30% to less than 40%	5%	5%	6%	2%
40% and more	14%	9%	8%	5%
Don't know/refused	9%	26%	5%	24%
Average	16%	14%	12%	10%

21. Papua New Guinea

Table 21: Now a question about Papua New Guinea. Please say whether you personally agree or disagree with each of the following statements:

	Agree		Disagree		Don't know/no view	
	2015*	2018#	2015*	2018#	2015*	2018#
Australia has a moral obligation to help Papua New Guinea	77%	Total: 77% [†] Strongly agree: 36% Somewhat agree: 41%	19%	Total: 18% [‡] Somewhat disagree: 12% Strongly disagree: 6%	4%	5%
Stability in Papua New Guinea is important to Australia's national interest	82%	Total: 76% [†] Strongly agree: 33% Somewhat agree: 43%	13%	Total: 16% [‡] Somewhat disagree: 12% Strongly disagree: 4%	5%	9%
Australia's relationship with Papua New Guinea has been damaged because of the Manus Island detention centre	-	Total: 59% [†] Strongly agree: 19% Somewhat agree: 40%	-	Total: 28% [‡] Somewhat disagree: 20% Strongly disagree: 8%	-	14%
Australian aid to Papua New Guinea has little impact on life in Papua New Guinea	38%	Total: 37% [†] Strongly agree: 9% Somewhat agree: 28%	42%	Total: 45% [‡] Somewhat disagree: 33% Strongly disagree: 12%	20%	19%
Papua New Guinea has strong economic prospects	37%	Total: 34% [†] Strongly agree: 8% Somewhat agree: 26%	46%	Total: 46% [‡] Somewhat disagree: 37% Strongly disagree: 9%	17%	21%

* In 2015 answers were given as agree/disagree only.

[†] Total: strongly and somewhat agree.

[‡] Total: strongly and somewhat disagree.

22. Indonesia

Table 22: I am going to read out a number of statements about Indonesia. For each one, please say whether you personally agree or disagree.

	Agree		Disagree		Don't know/no view	
	2011	2018#	2011	2018#	2011	2018#
Indonesia is an important economy to Australia	65%	58%	27%	28%	8%	14%
Australia is managing its relationship with Indonesia well	61%	52%	30%	25%	9%	23%
Indonesia is a dangerous source of Islamic terrorism	54%	44%	40%	44%	7%	12%
The Indonesian government has worked hard to fight terrorism	-	32%	-	41%	-	27%

	Agree				Disagree				Don't know/no view			
	2013~	2015	2017	2018#	2013~	2015	2017	2018#	2013~	2015	2017	2018#
Indonesia is a democracy [^]	33%	34%	27%	24%	51%	54%	50%	50%	16%	12%	22%	26%

~ In 2013, answers were given on a scale of strongly agree, somewhat agree, somewhat disagree, and strongly disagree. In the 2015 responses above, 'strongly agree' and 'somewhat agree' are shown combined as 'agree', and 'strongly disagree' and 'somewhat disagree' are shown combined as 'disagree.'

[^] The statement 'Indonesia is a democracy' was asked as part of the above set of agree/disagree statements regarding Indonesia in 2018#, and as part of a similar set of statements in 2013. In 2015 and 2017, it was asked as a standalone question, worded 'Now a question about Indonesia. Do you personally agree or disagree that Indonesia is a democracy?' Responses were given on a scale of 'strongly agree', 'somewhat agree', 'somewhat disagree', and 'strongly disagree'. 'Agree' totals shown above for 2013, 2015, and 2017 are combinations of the 'strongly' and 'somewhat' agree response from that year, and the 'disagree' totals are combinations of the 'strongly' and 'somewhat' disagree response.

23. Democracy

Table 23: Now a question about democracy. I am going to read you three statements about democracy. Please say which one of the three statements comes closest to your own personal views about democracy.

	2012	2013	2014	2015	2016	2017	2018#
Democracy is preferable to any other kind of government	60%	59%	60%	65%	61%	60%	62%
In some circumstances, a non-democratic government can be preferable	23%	26%	24%	18%	24%	20%	20%
For someone like me, it doesn't matter what kind of government we have	15%	13%	13%	15%	12%	16%	15%
Don't know	1%	2%	3%	2%	3%	4%	3%

24. Feelings towards other countries

Table 24: Please rate your feelings towards some countries, with 100 meaning a very warm, favourable feeling, zero meaning a very cold, unfavourable feeling, and 50 meaning not particularly warm or cold. You can use any number from zero to 100: the higher the number the more favourable your feelings are towards that country. If you have no opinion or have never heard of that country, please say so.^a

Country	2006	2007	2008	2009	2010	2011	2012	2013	2014	2015	2016	2017	2018 [#]
New Zealand	-	81	-	83	84	85	85	-	84	83	-	85	86
Canada	-	-	-	80	82	-	-	-	81	-	84	-	84
UK/England/Great Britain ^b	74	75	77	-	-	79	-	77	-	79	-	81	82
Japan	64	63	64	66	64	67	70	65	67	68	70	71	74
Germany	-	-	-	68	-	-	-	70	-	71	72	71	71
France	-	-	69	-	70	-	-	-	71	-	-	71	70
USA/United States	62	60	64	67	68	70	71	70	71	73	68	69	67
European Union	-	-	-	-	-	-	-	-	-	-	-	62	67
Papua New Guinea	63	57	60	-	62	-	64	60	59	58	63	61	63
South Korea	56	-	50	53	-	57	61	-	59	-	-	60	62
Philippines	-	-	-	-	-	-	-	-	-	-	-	59	61
Taiwan	-	-	-	-	-	58	-	-	-	-	59	-	60
India	62	55	57	56	55	56	58	55	57	56	59	60	58
China	61	56	56	53	54	53	59	54	60	58	58	59	58
East Timor	57	54	56	50	-	-	-	-	58	-	60	-	57
Indonesia	50	47	50	49	54	51	54	53	52	46	54	55	54
Myanmar/Burma	-	-	-	46	-	-	50	50	50	-	55	54	50
Russia	-	-	55	-	55	-	-	-	-	45	52	50	47
Saudi Arabia	-	-	-	-	-	-	-	-	-	-	-	-	40
North Korea	43	-	-	30	37	34	33	31	29	29	26	30	25

^a In 2006, this question asked respondents about their feelings towards 'countries and peoples'.

^b Until 2015, asked as 'Great Britain'; in 2015, asked as 'United Kingdom (Great Britain)'.

25. Direction of the world

Table 25: Turning to the situation in the world overall, are you satisfied or dissatisfied with the way things are going in the world today?

	2017	2018#
Satisfied	19%	17%
Dissatisfied	79%	78%
Neither/don't know/no view	2%	5%

26. Direction of the nation

Table 26: Overall, are you satisfied or dissatisfied with the way things are going in Australia today?

	2017	2018#
Satisfied	47%	49%
Dissatisfied	48%	46%
Neither/don't know/no view	4%	5%

NOTES

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ABOUT THE LOWY INSTITUTE POLL

The 2018 Lowy Institute Poll reports the results of a nationally representative survey conducted by the Social Research Centre between 5 and 25 March 2018 with a sample size of 1200 Australian adults.

A number of questions in the 2018 Poll were first asked in previous Lowy Institute Polls, or have been adapted from questions asked in those years. Repeating questions in successive years allows us to compare public opinion on a single issue over time, building trend data on important international policy issues.

Some of our questions this year are identical to or closely adapted from questions asked previously by other survey organisations, which allows for the comparison of public opinion internationally.

The order of questions in the questionnaire was different from the order presented in this report.

Methodology

For this year's annual Poll fieldwork, the Social Research Centre conducted a total of 1200 interviews using a combination of telephone and online responses, with a sample designed to be nationally representative of all Australians 18 years and older.

In 2018, for the first time, a portion (n=600 responses) of the Lowy Institute Poll's fieldwork has been conducted online, using Social Research Centre's Life in Australia panel. This panel uses random probability-based sampling methods and covers both the online and offline population. Fieldwork for this panel was conducted between 5 and 19 March 2018.

The telephone survey portion, using fixed lines and mobile devices, was conducted from 7 to 25 March 2018, with a total of 600 responses. Location quotas were set for each state and territory. Within each geographic area, telephone numbers were randomly selected from regularly updated active residential and mobile phone number databases. To ensure the sample included those people who tend to spend a lot of time away from home, a system of call backs and appointments was incorporated.

In order to ensure comparability with the telephone responses of our 2005–17 Polls, the two response sets were weighted and blended using the following approach: first, weights for the telephone respondents 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 with their base weights adjusted so they match key population characteristics. These weights were used in the production of all tables in this report.

The blending and weighting methodology used for the 2018 Poll was developed to provide continuing comparability to previous surveys in the series conducted by telephone. Differences between telephone-only responses and combined telephone and online responses were not statistically significant.

On a truly random sample of 1200, the maximum sampling variance (or 'margin of error') is 2.8%, which means there is a 95% chance that responses from the sample fall within a range of 2.8% either side of the notional collective response of the whole population. Since these samples were stratified by state and territory, the error figure is a guide only. Where the results for a sub-sample are reported, the margin of error is greater.

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