

LOWY INSTITUTE
**POLL
2020**

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UNDERSTANDING
AUSTRALIAN
ATTITUDES
TO THE WORLD

PREFACE

The coronavirus pandemic of 2020 will reverberate long into the future. International travel is banned and borders are closed. Many of the social interactions that we all enjoy remain on pause. Governments have deliberately shut down whole sections of their economies and a prolonged global economic downturn seems certain.

This is a global crisis, but we have all turned inwards, not outwards.

No one has looked to the United Nations headquarters in New York for solutions — or for hope. Instead, we have all fallen back on the nation-state. We have tuned in to speeches by our own national leaders.

And yet, international relations have never been more important than they are now. None of humanity's greatest problems — including pandemics — are susceptible to purely national solutions.

At this time, the world is asking big questions of Australia. Our ties to China are being tested by an increasingly assertive party-state. Our great ally, the United States, was already self-isolating under the presidency of Donald Trump. Now, in the middle of the pandemic, it looks seriously unwell.

The 2020 Lowy Institute Poll records unprecedented shifts in public opinion. Only half the country reports feeling safe — a record low for Australians. Our concern about a global economic downturn has skyrocketed. Optimism about our economic prospects has sunk to an historic low.

Trust in our largest trading partner — China — has declined precipitously. Confidence in China's leader Xi Jinping, has fallen even further. Almost all Australians would like to see diversification in order to reduce our economic dependence on China, and most would support imposing travel and financial sanctions on Chinese officials associated with human rights abuses.

Most Australians continue to believe that our alliance with the United States is important to our security. But trust in the United States has stagnated, and few Australians have confidence in President Trump. Only a small minority of the country support the President's signature policies: increasing tariffs on imports, criticising the defence spending of US allies, and taking America out of the Trans-Pacific Partnership negotiations and the Paris climate agreement.

Many believed 2020 would be a year of debate about climate policy in Australia, in the aftermath of our hellish summer of bushfires. But COVID-19 has turned Australians' heads. Though Australians continue to view climate change as a critical threat, their anxiety has been eclipsed by the pandemic and its economic effects.

As well as the annual Lowy Institute Poll, this report also incorporates COVIDpoll, a survey that asked Australians about global responses to the coronavirus pandemic. Australians were disappointed by the approaches taken by the United States, the United Kingdom and China, but were impressed by their own leaders' responses. The coronavirus performance of the superpowers has been unimpressive; but smaller, more agile countries such as Australia, with rational politicians and effective bureaucracies, have done better.

The Lowy Institute Poll, now in its sixteenth year, captures the mood of the Australian public at a remarkable moment. Australians are sceptical of China, disappointed in the United States, and anxious about the economic downturn. But even in the face of this grave pandemic, Australians retain their belief in globalisation and democratic values.

Dr Michael Fullilove
Executive Director
June 2020

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EXECUTIVE SUMMARY

Trust in global powers

Trust in China is at the lowest level ever recorded in the Lowy Institute Poll, with only 23% of Australians saying they trust China somewhat or a lot 'to act responsibly in the world', a 29-point fall since 2018. Most Australians trust the United Kingdom (84%) and Japan (82%). A bare majority (51%) trust the United States, which is steady from 2019. Less than half of Australians trust India (45%), a 14-point drop from 2018, and even fewer trust Indonesia (36%), a 16-point fall from 2017. Only 24% of Australians say they trust Russia.

Confidence in world leaders

Only one in three Australians (30%) express some or a lot of confidence in US President Donald Trump 'to do the right thing regarding world affairs', a five-point increase from 2019. Confidence in China's President Xi Jinping has fallen sharply in the past two years, with only 22% of Australians expressing confidence in him. This represents an eight-point drop from 2019, and is 21 points lower than his result in 2018.

New Zealand's Prime Minister Jacinda Ardern tops the list of leaders again, with 87% of Australians expressing confidence in her to do the right thing in world affairs. Seven in ten (73%) express confidence in Japan's Prime Minister Shinzo Abe, an increase of seven points from 2018.

Six in ten Australians express confidence in Australian Prime Minister Scott Morrison (60%) and in Opposition leader Anthony Albanese (58%). Around half (55%) have confidence in UK Prime Minister Boris Johnson. Four in ten Australians (42%) have confidence in India's Prime Minister Narendra Modi. Even fewer Australians (32%) express confidence in Indonesian President Joko Widodo. A mere 6% of Australians say they have confidence in North Korea's Kim Jong-un.

Relations with superpowers

More than half the country (55%) say Australia's relationship with the United States is more important than Australia's relationship with China. Only four in ten Australians (40%) today choose China as the more important relationship. The gap between the two superpowers on this question is now 15 points, whereas the two were inseparable in 2017.

In the Lowy Institute's COVIDpoll, fielded in April 2020, nine in ten Australians (93%) say Australia has handled the COVID-19 pandemic very or somewhat well so far. A third (31%) say China

has handled the outbreak well, and only 10% say the United States has handled it well so far. A majority of Australians (68%) feel 'less favourable towards China's system of government' when thinking about China's handling of COVID-19. A third (37%) say China will be more powerful than it was before the pandemic, while 27% say it will be less powerful. Half (53%) say the United States will be less powerful than before the crisis.

The United States

Three quarters of Australians (78%) say that the alliance with the United States is either very or fairly important to Australia's security, an increase of six points from 2019. The vast majority of Australians (88%) support the four-way dialogue between Australia, India, Japan and the United States, known as the Quadrilateral Security Dialogue, resurrected in 2017.

Several of US President Donald Trump's signature policies are unpopular with Australians. Although two-thirds approve of President Trump's negotiations with North Korea's Kim Jong-un (66%) and his efforts to improve relations with Russian President Vladimir Putin (63%), only one third (35%) approve of President Trump's administration 'increasing tariffs on imported goods from other countries'. Even fewer approve of President Trump 'criticising the defence spending' of US allies (24%) and withdrawing from the Trans-Pacific Partnership (22%). Only 19% approve of President Trump 'withdrawing the United States from international climate change agreements'.

China

More than half (55%) see China as an economic partner, rather than a security threat (41%), although an overwhelming 94% of Australians agree that the Australian government should work 'to find other markets for Australia to reduce our economic dependence on China'. Eight in ten Australians (82%) would approve of the government 'imposing travel and financial sanctions on Chinese officials associated with human rights abuses'.

A majority of Australians (59%) would support Australia 'jointly funding aid projects with China in the Pacific and Asia'. The majority (57%) also say the government should restrict 'joint scientific research between Australia and China in defence and security-related fields'. Four in ten Australians (39%) say that Chinese companies should be allowed to 'supply technology for critical infrastructure in Australia'. Only 39% of Australians support 'conducting joint military exercises' with China.

Almost half of the population (49%) say that 'China's economy will slow down and the Australian economy will suffer', an increase of five points from 2016. A similar number (48%) say 'China's economy will continue to grow strongly and this will benefit Australia', a view that was held by the majority of the country (52%) in 2016.

Feelings of safety and threats to Australia's interests

Only half of Australians (50%) say they feel safe in 2020, a record low in the history of the Lowy Institute Poll, and a 28-point drop since 2018. Three-quarters of Australians say COVID-19 (76%) and 'drought and water shortages' (77%) pose critical threats to Australia's vital interests in the next ten years. Seven in ten (71%) say that 'a severe downturn in the global economy' is a critical threat, a 20-point increase from 2019. A majority of Australians see 'environmental disasters such as bushfires and floods' (67%) and climate change (59%) as critical threats. Only 46% of Australians say international terrorism is a critical threat, down 15 points from 2019. And 42% now say 'foreign interference in Australian politics' is a critical threat, a seven-point drop from 2019.

Economic outlook and free trade

Australians' optimism about the economy has fallen to record lows, although a slight majority (52%) remain optimistic. This is the lowest level of optimism recorded in the history of the Lowy Institute Poll. It represents a 13-point fall from 2019, and is 34 points lower than the high point in 2009 and 2010 (86%). In COVIDpoll, seven in ten Australians (70%) say globalisation is mostly good for Australia, unchanged from 2019.

A majority of Australians say that free trade agreements with the European Union (58%) and the United Kingdom (56%) would be good for Australia. Only four in ten (44%) say that a free trade agreement with India would be good for Australia.

International students

A bare majority of the population (52%) say the number of international students enrolled at Australian universities is about right. Four in ten (43%) say it is too high, while only 3% say that the number of international students is too low.

Climate change and global warming

More than half (56%) say 'global warming is a serious and pressing problem' and 'we should begin taking steps now even if this involves significant costs', five points down from 2019 but 20 points higher than the low point of 36% in 2012. Around half the country say Australia's approach to climate change has had a negative effect on Australia's relations with Pacific island countries (51%) and a negative effect on Australia's reputation in the world (47%).

Intelligence and law enforcement agencies

Eight in ten Australians (80%) agree Australia's intelligence agencies are effective at protecting our national security. A majority (59%) say that Australia's intelligence agencies 'have got the balance right between protecting national security and also being appropriately open and transparent' with the public about their activities. The same number (59%) also agree the Australian government 'has got the balance right between the

need for press freedom and the need to enforce the law and protect national security'.

Foreign policy, global cooperation and values

When asked about Australia's priorities in the event of a clash between economic interests and democratic values, six in ten Australians (60%) say democratic values are more important, whereas one third (38%) say economic interests are more important. In the case where a clash occurs between the global interest in solving global problems and the domestic interests of individual countries, 66% of Australians say the 'government should prioritise Australia's domestic interests over reaching a global agreement' in an international institution. One third of Australians (31%) say that the 'government should prioritise global agreement over Australia's domestic interests'.

Democracies around the world

Nine in ten Australians (90%) say the United Kingdom is a democracy, and eight in ten (81%) say the same about the United States. A similar number (79%) recognise Japan as a democracy. The majority of Australians agree that India (57%), Papua New Guinea (53%) and Taiwan (52%) are democracies. However, only 39% agree that Indonesia is a democracy, in a five-point increase from 2019. A third of Australians (37%) see Hong Kong as a democracy, while only one in ten Australians (10%) agree China is a democracy.

Feelings thermometer

Canada leads the feelings thermometer in 2020 at 79°, although this is five degrees lower than in 2018. Feelings towards the United States in 2020 sit steady at 62°. Feelings towards Hong Kong and South Korea have both fallen five degrees to 58° and 57°. Australian perceptions of Vietnam (58°), Papua New Guinea (57°) and Taiwan (57°) remain warm. And feelings towards India (52°) and Indonesia (51°) are neutral.

After a nine-degree fall in 2019, China has registered a further ten-degree drop to 39° in 2020. Both of these consecutive falls in sentiment represent the greatest single-year declines in the history of the Lowy Institute Poll feelings thermometer.

Feelings towards Russia remain cool at 42°, 13 points lower than in 2010. The Palestinian Territories receive a cool 39° from Australians, eight degrees lower than Israel (47°). Iran and Saudi Arabia are last on the thermometer at 33° and 32°.

The 2020 Lowy Institute Poll reports the results of a nationally representative online and telephone survey conducted between 16 and 29 March 2020 by the Social Research Centre with a sample size of 2448 Australian adults. The margin of error is approximately 2.0% and design effect estimated at 1.93. COVIDpoll was conducted between 14 and 27 April 2020 by the Social Research Centre with a sample size of 3036 Australian adults. The margin of error is approximately 1.8% and design effect estimated at 1.86.

GLOBAL POWERS AND WORLD LEADERS

Trust in global powers

The year 2020 has been marked by disasters, from Australia's bushfire crisis to the global COVID-19 pandemic. In such uncertain times, Australians are less trusting of most countries around the world than in the past.

China is the clearest example: in the past two years, trust in China to act responsibly in the world has more than halved, down from a majority (52%) in 2018 to only 23% saying they trust China in 2020. This is a nine-point fall from 2019 for those that trust China somewhat or a great deal.

This distrust was further reflected in the Lowy Institute's COVIDpoll conducted in April, in which only 31% of Australians say China has handled

the COVID-19 outbreak very or fairly well to date. When thinking about the way China handled the outbreak, 68% say they feel 'less favourable towards China's system of government' (see page 22).

Australians typically place more trust in liberal democracies such as the United Kingdom and Japan, although that has also slipped compared with two years ago. The UK garners the highest level of trust from Australians, with 84% saying they trust the UK either a great deal or somewhat. After a year that has seen a new prime minister, the departure from the European Union and mistakes in handling the pandemic, the number who trust the UK a great deal 'to act responsibly in the world' has fallen 21 points compared with 2018, to 24%.

FIGURE 1

Trust in global powers

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

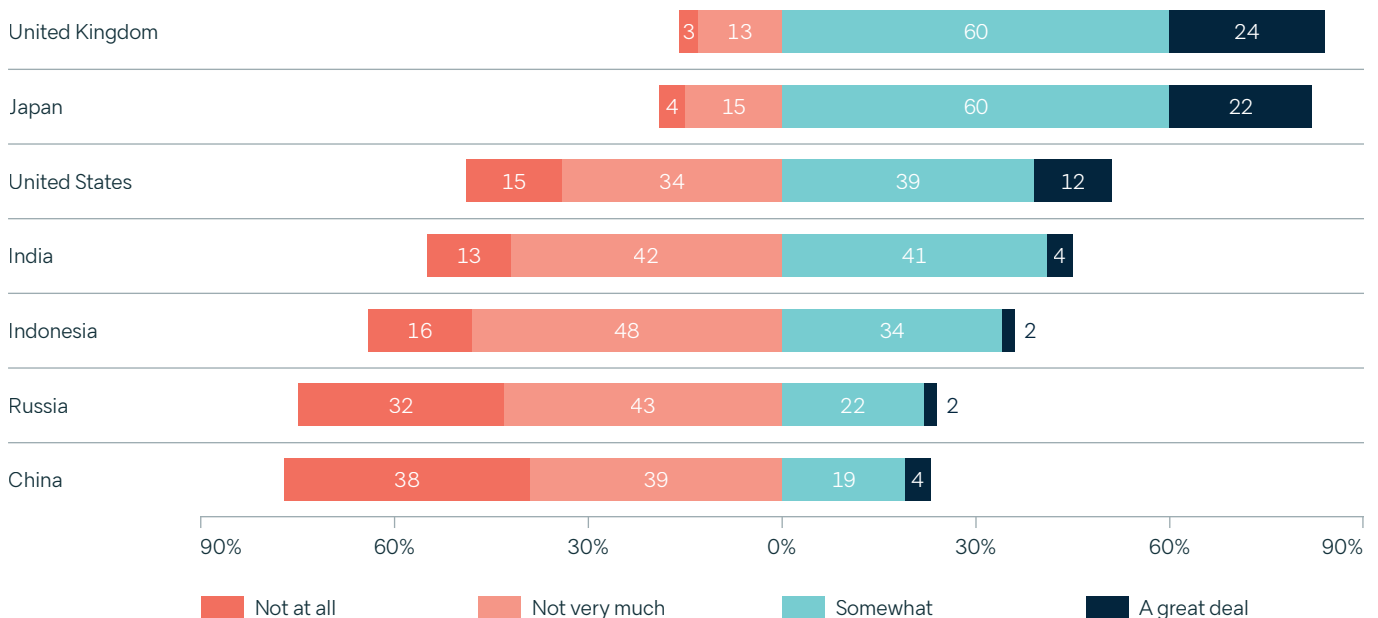
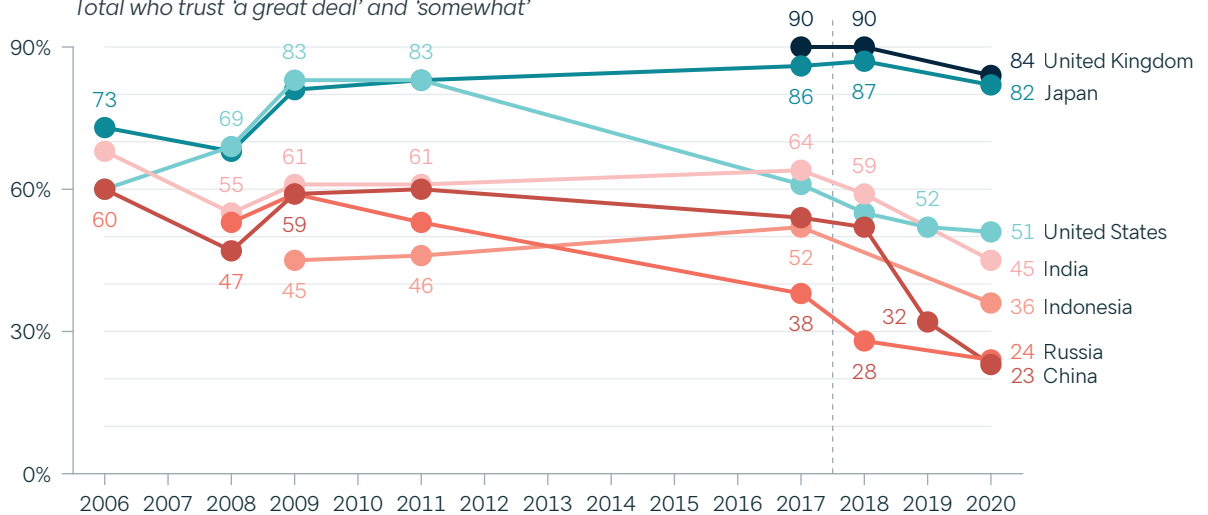


FIGURE 2
Trust in global powers – historical

How much do you trust the following countries to act responsibly in the world?
Total who trust 'a great deal' and 'somewhat'



Dashed line indicates change in mode: see Methodology, p.46.

Many Australians are unimpressed with the UK's handling of COVID-19, with only 30% of the respondents to COVIDpoll saying the UK has done very or fairly well so far (see page 22).

Japan has recorded high levels of trust from the Australian people in recent years. In 2020, eight in ten Australians (82%) trust Japan somewhat or a great deal to act responsibly in the world. But only 22% say they trust Japan a great deal, an 11-point fall from 2018.

Australians' trust in China to act responsibly in the world has more than halved in the past two years

There is a wide gap between Australians' trust in the United Kingdom and Japan and their trust in the United States. Around half (51%) say they trust the United States a great deal or somewhat to act responsibly in the world, unchanged from 2019. More Australians (61%) trusted the United States during President Trump's first year in office in 2017. In 2020, trust in the United States is 32 points lower than at the high point between 2009 and

2011 (83%), during the administration of President Barack Obama.

According to Australians, the United States' response to COVID-19 has been even worse than China's. In April's COVIDpoll, only one in ten (10%) say the United States is doing very or fairly well in handling the COVID-19 outbreak, which ranks the United States at the bottom of a list of six countries (see page 22).

Reports of rising Indian nationalism and protests against new Indian citizenship laws may have affected levels of trust in India this year. Fewer than half (45%) trust India to act responsibly in the world, a 14-point drop from 2018. Closer to home, trust in Indonesia has also declined to its lowest point in Lowy Institute polling. Only a third (36%) express trust in Indonesia to act responsibly in the world, a 16-point fall from 2017.

Russia sits with China as one of the least-trusted global powers for Australians, with only 24% saying they trust Russia to act responsibly in the world. A mere 2% of Australians say they have a great deal of trust in Russia.

Confidence in world leaders

The continuing decline in trust in China corresponds with falling levels of confidence in China's leader Xi Jinping. Only 22% of Australians have either a lot or some confidence in President Xi 'to do the right thing regarding world affairs', an eight-point drop from 2019, and 21 points lower than in 2018.

In 2019, more Australians expressed confidence in China's President Xi than in US President Donald Trump. But this has reversed in 2020, despite the widely-publicised US House of Representatives vote to impeach President Trump. Only one in three Australians (30%) have confidence in President Trump, but this is five points up from 2019, and eight points ahead of Xi Jinping. (It should be noted that the Lowy Institute Poll fieldwork took place from 16–29 March, well before the peak of the COVID-19 crisis in the United States.) Only China's Xi Jinping and North Korea's Kim Jong-un receive fewer votes of confidence from Australians than President Trump.

Lacking confidence in President Trump, Australians are leaning towards a change of US president in the November presidential election. When Australians were asked in April which candidate they prefer, 73% say former Vice President Joe Biden, if he is the Democratic candidate. Only 23% say they prefer President Trump (see COVIDpoll on page 22).

For the second year in a row, New Zealand's Prime Minister Jacinda Ardern tops Australians' list of global leaders, with 87% of Australians saying they either have some or a lot of confidence in her to do the right thing in world affairs.

Almost three quarters of Australians (73%) express confidence in Japan's Prime Minister Shinzo Abe, an increase of seven points from 2018.

Six in ten Australians express confidence in Prime Minister Scott Morrison (60%) and in the leader of the Opposition Anthony Albanese (58%). Levels of confidence in Prime Minister Morrison have not

shifted significantly from his 2019 result (58%), while Mr Albanese's result was six points higher than former Opposition leader Bill Shorten's result last year (52%).

Only 55% of Australians say they have confidence in UK Prime Minister Boris Johnson, a result which may reflect Australians' views towards Brexit, as demonstrated in past Lowy Institute polling.¹ Prime Minister Johnson was re-elected in 2019, and he inspires confidence in fewer Australians than his predecessor, former Prime Minister Theresa May, did in 2018 (68%). (On 27 March, it was announced that Prime Minister Johnson had contracted the novel coronavirus, which may have affected a very small number of results collected between 27 and 29 March for this Poll.)

Only Xi Jinping and Kim Jong-un receive fewer votes of confidence from Australians than Donald Trump

Australians' confidence in India's Prime Minister Narendra Modi has improved slightly, following his re-election in 2019. This year, 42% of Australians have either some or a lot of confidence in Prime Minister Modi 'to do the right thing regarding world affairs', an increase of five points since he was last included in the Poll in 2018.

Indonesia's President Joko Widodo was also re-elected in 2019. Consistent with low levels of trust in Indonesia, only one third of Australians (32%) express confidence in Jokowi, which has not changed significantly from 2019 (34%).

Although many Australians express support for US President Trump's decision to meet North Korea's leader in 2018 and 2019 (see page 12), Kim Jong-un has consistently received very few votes of confidence from the Australian public. Only 6% say in 2020 they have some or a lot of confidence in Kim Jong-un to do the right thing in world affairs.

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.

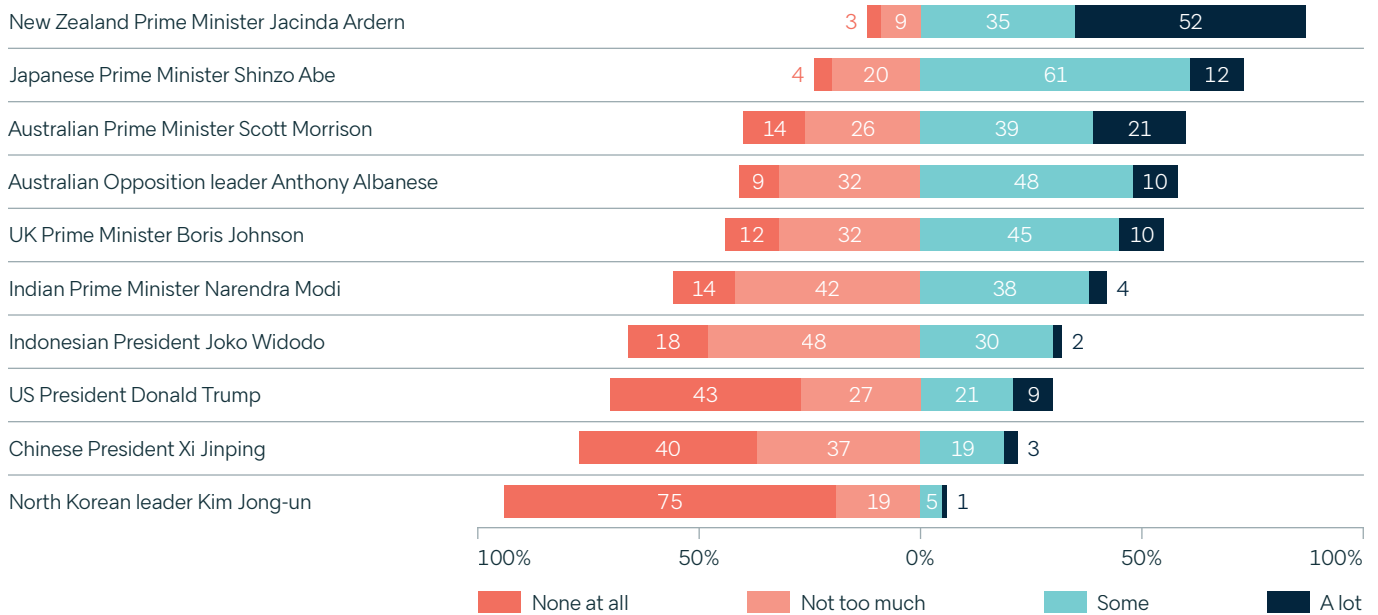
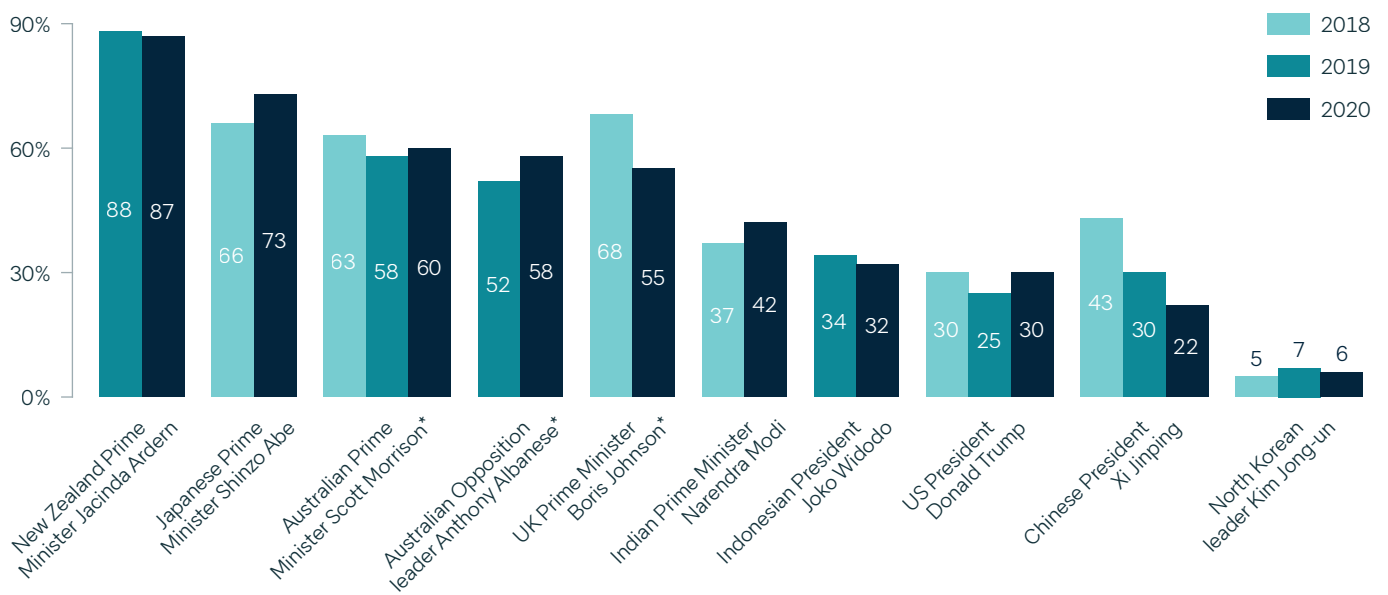


FIGURE 4

Confidence in world leaders – historical

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.

Total: a lot and some confidence



* In 2018, this question was asked about former Australian Prime Minister Malcolm Turnbull and former UK Prime Minister Theresa May. In 2019, this question was asked about former Australian Opposition leader Bill Shorten.

RELATIONS WITH SUPERPOWERS – CHINA AND THE UNITED STATES

The public debate surrounding Australia’s ties to the world’s two largest economies — China and the United States — has only been sharpened by the COVID-19 pandemic, and Australians appear to be leaning towards the United States. In 2020, more than half of the adult Australian population (55%) say Australia’s relationship with the United States is more important than the relationship with China. Only four in ten Australians (40%) today say China is the more important relationship. The gap between the two superpowers on this question is now 15 points, where three years ago they were inseparable: in 2017, 45% said the US relationship was more important, compared with 43% choosing the China relationship.

However, there is a divide between younger and older Australians on this issue. The majority of those aged 18–29-years (54%) say the relationship with China is more important, while only 43% of that age

group see the relationship with the United States as more important. By contrast, 57% of Australians aged over 30 see Australia’s relationship with the United States as more important, compared with 37% selecting China.

Australians see the COVID-19 crisis as having a great impact on the relative power of the United States and China, much like that inflicted by the global financial crisis more than a decade ago. In April’s COVIDpoll, a majority of Australians (53%) say the United States will be less powerful than it was before the crisis. This is 20 points higher than the response in 2009 after the financial crisis, when 33% of Australians said the United States would be less powerful than it had been. In 2020, more than a third of Australians (37%) say China will be more powerful after the crisis, but this is much lower than the 72% who said China would be more powerful after the financial crisis in 2009 (see page 22).

FIGURE 5
Major power relations

Thinking about Australia’s relationships with the United States and China.
Which relationship do you think is more important to Australia?

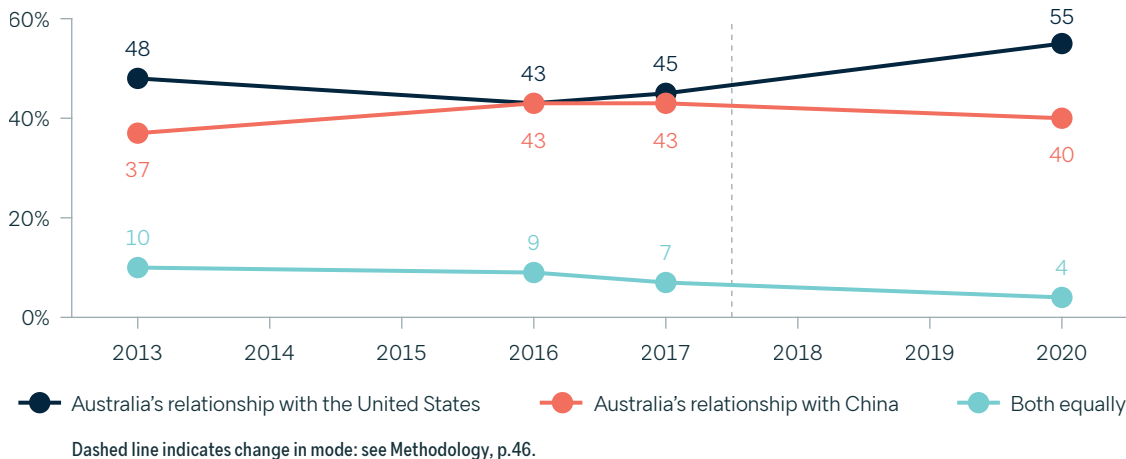
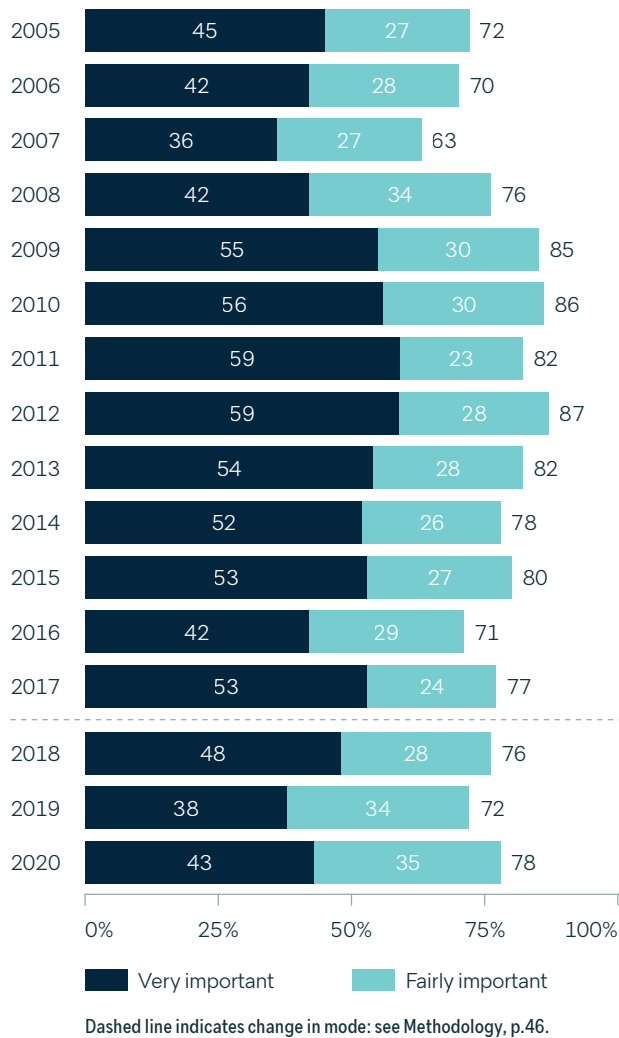


FIGURE 6
Importance of the US alliance

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?



Australian support for ANZUS remains high, although many would not support military action

The United States and ANZUS

Australians have consistently expressed high levels of support for Australia’s alliance with the United States in the Lowy Institute Poll, even at times when US presidents were unpopular in Australia. In 2020, more than three quarters of Australians (78% – up six points this year) say that the alliance with the United States is either very or fairly important to Australia’s security.

Low levels of confidence in President Trump may have had some impact on Australian sentiment about the alliance in 2019, but support for ANZUS has now rebounded. The 2020 result is 15 points higher than in 2007 (63%), which remains the low point for Australian support for the alliance in 16 years of the Lowy Institute Poll.

Although Australians remain highly supportive of the security alliance with the United States, there is persistent reluctance to support military action under ANZUS. The majority of Australians (68%) say ‘despite the alliance, Australia should only support US military action if it is authorised by the United Nations’.

Only four in ten Australians (40%) agree with the statement that ‘Australia should act in accordance with our security alliance with the United States if it means supporting military action in the Middle East, for example, against Iran’. This is an eight-point decline from 2013. Even fewer Australians (34%) agree with Australian support for ‘military action in Asia, for example, in a conflict between China and Taiwan’. In 2013, a similar proportion (38%) said Australia should act in accordance with the alliance even if it meant supporting US military action in a conflict between China and Japan.

There is strong support for the Quadrilateral Security Dialogue between Australia, India, Japan, and the United States. Most Australians (88%) say they would support ‘Australia forming a partnership with the democracies of India, Japan and United States to promote peace and security in the region’.

President Trump’s policies

Reinforcing low levels of confidence in President Trump, Australians are sceptical of a number of his signature policies. President Trump’s attempt to engage with other authoritarian leaders meets with some approval, however. President Trump was the first US president to travel to North Korea and meet with its leader Kim Jong-un, and many Australians appear to support this ‘summit diplomacy’ with Kim: two thirds (66%) say they approve of his ‘negotiating with North Korean leader Kim Jong-un about the country’s nuclear weapons program’. A similar number (63%) approve of improved relations between President Trump and Russian President Vladimir Putin.

Most Australians disapprove of President Trump’s ‘America First’ policies

However, most Australians appear to disapprove of President Trump’s “America First” policies. Only a third of Australians (35%) approve of President Trump ‘increasing tariffs on imported goods from other countries’.

About a quarter of Australians (24%) approve of President Trump ‘criticising the defence spending of allies of the US’. Even fewer Australians (22%) approve of the US withdrawal from negotiations to form the Trans-Pacific Partnership, a free trade agreement between 11 Asia-Pacific countries including Australia.

Only a small minority (19%) approve of President Trump’s decision to withdraw the United States from international climate change agreements after the formal process to leave the Paris Agreement on climate change commenced in 2019.

FIGURE 7

Policies of President Trump

Here are some policies of US President Donald Trump. Please indicate whether you approve or disapprove of each one:

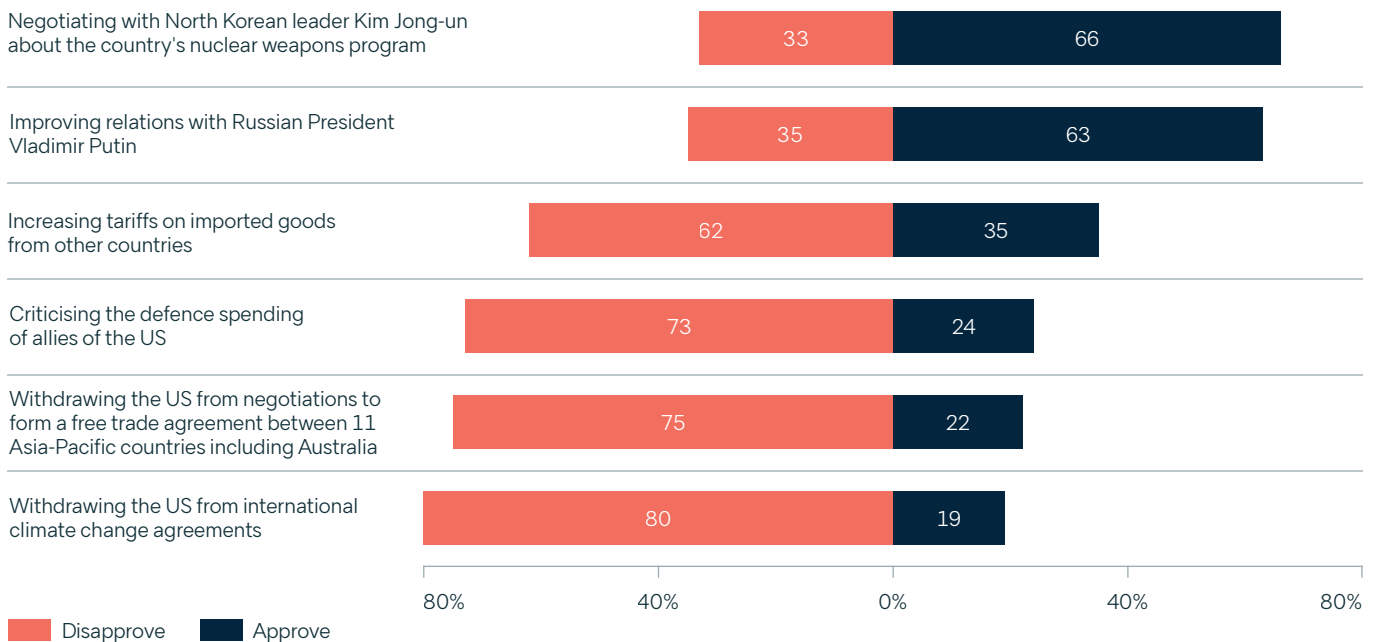
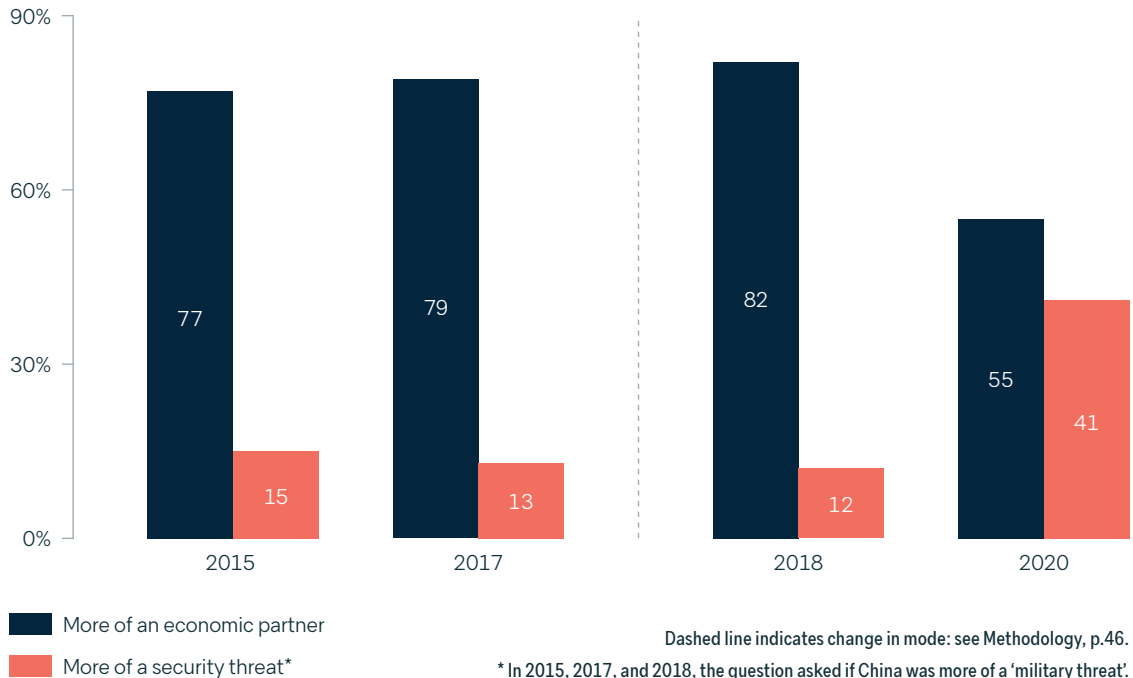


FIGURE 8

China: economic partner or security threat

Thinking now about Australia and China. In your own view, is China more of an economic partner to Australia or more of a security threat to Australia?



China

Sixteen years of Lowy Institute Polls has uncovered the complex set of attitudes Australians hold about our largest trading partner. Australians’ views of China’s economy and people have tended to be positive, while Chinese investment and China’s human rights record have elicited negative views. This balance began to tip in 2019, when trust and warmth towards China reached record lows, and this year’s results confirm this downward trend.

Trust in China is at its lowest point in the history of the Poll, with 23% saying they trust China a great deal or somewhat ‘to act responsibly in the world’ (see page 6). Only 22% of Australians have some or a lot of confidence in China’s President Xi Jinping to do the right thing in world affairs (see page 8). And feelings towards China on a scale of 0° to 100° have fallen sharply in 2020, to 39°. This represents a drop of 10 degrees in a single year, and the lowest

score that China has received in the history of the Poll (see page 29).

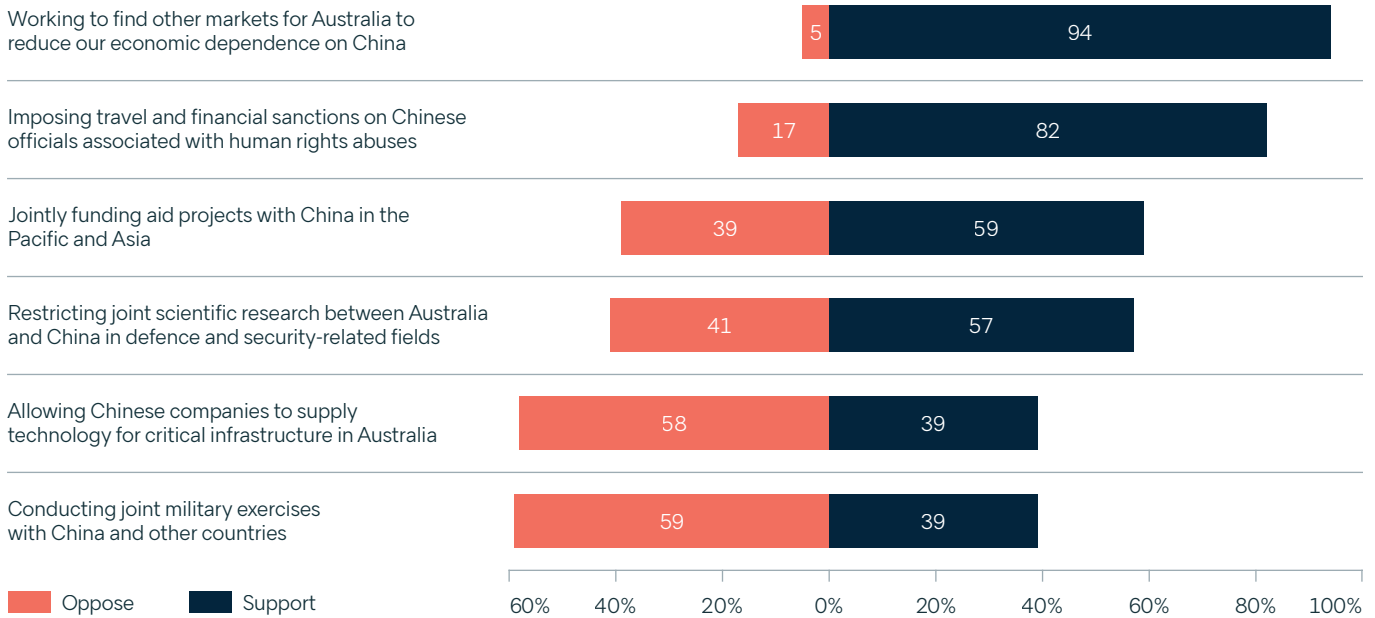
Australians’ trust and warmth towards China have reached record lows

More Australians (55%) see China as ‘more of an economic partner’ than the 41% that see China as ‘more of a security threat’ to Australia. Far fewer Australians see China as an economic partner in 2020, in a 27-point fall from 82% to 55% since 2018. In 2018, Australians were asked to weigh up their perception of China as an economic partner versus a military threat, and the balance of opinion tipped far more heavily towards China being an economic partner (82%) rather than a military threat (12%).

FIGURE 9

Australian policy options towards China

Would you support or oppose the following Australian government policies towards China?



The COVID-19 pandemic and subsequent political debate have only heightened the scrutiny of the relationship between Australia and China — and in particular, the economic interdependence between the two countries.

94% of Australians say we should find other markets to reduce economic dependence on China

In 2020, almost all Australians (94%) agree that the government should work ‘to find other markets for Australia to reduce our economic dependence on China’. This is the single largest point of agreement in the history of the Lowy Institute Poll. In 2019, 74% of Australians said Australia was too economically dependent on China.

There is also considerable scepticism about other forms of cooperation between Australia and China. A majority of Australians (57%) say the government

should restrict ‘joint scientific research between China and Australia in defence and security-related fields’.

Four in ten (39%) say that Chinese companies should be allowed to supply technology for critical infrastructure in Australia. In 2019, 44% said that protecting Australians from foreign state intrusion should be the first priority for government when considering whether foreign companies should be allowed to supply technology for critical infrastructure.

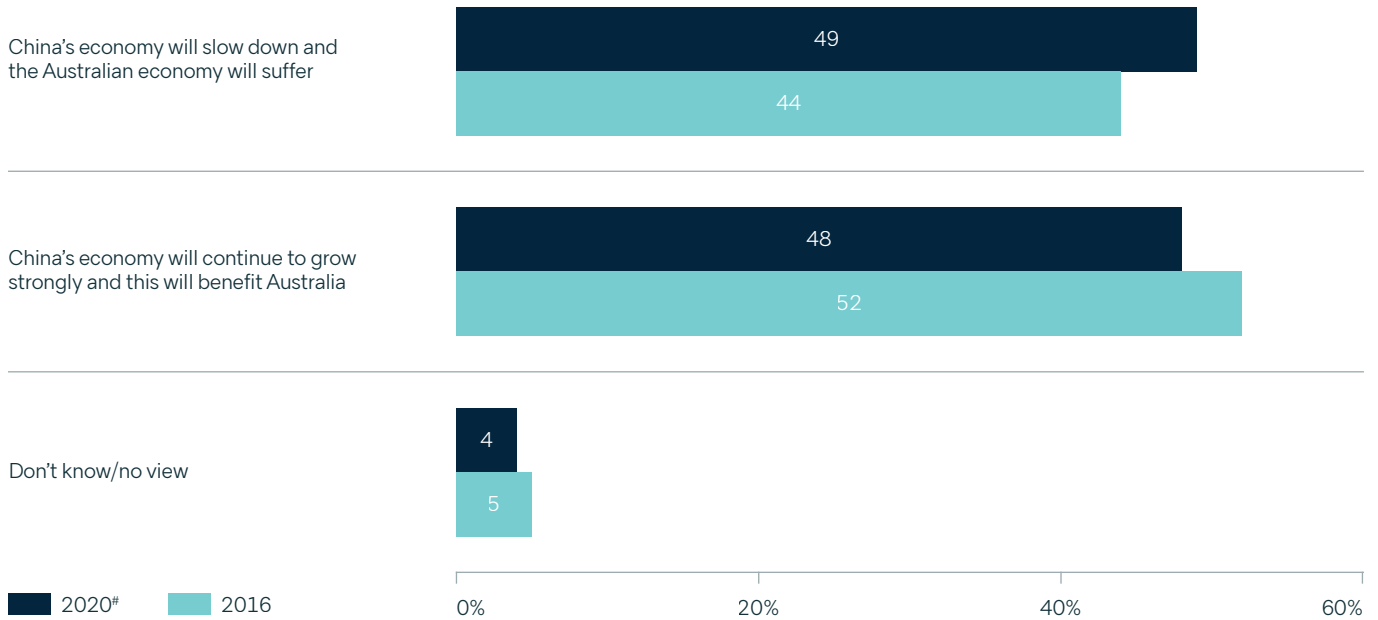
Australians are also wary of military cooperation with China. A minority of Australians (39%) support ‘conducting joint military exercises with China and other countries’. Since 2015, Australian and Chinese military officers have both participated in Exercise Pandaroo.²

Eight in ten Australians (82%) would approve of the Australian government ‘imposing travel and

FIGURE 10

China and Australia’s economic future

Please indicate which statement most closely matches your own opinion about China’s economy in the next five years:



Note change in mode: see Methodology, p.46.

financial sanctions on Chinese officials associated with human rights abuses’, suggesting that there may be significant public support for the inquiry the Australian parliament commenced in late 2019 investigating the use of targeted sanctions to address human rights abuses.³ This aligns with views previously expressed by Australians about the human rights situation in China: in 2019, only 27% of the country said Australia was doing enough to pressure China to improve human rights.

However, there are also areas where Australians support a cooperative relationship with China. More than half of Australians (59%) would support Australia ‘jointly funding aid projects with China in the Pacific and Asia’. In 2019, around three quarters of Australians (73%) said that Australia should try to prevent China from increasing its influence in the Pacific. More than half (55%) said that China opening a military base in a Pacific island country would pose a critical threat to the vital interests of Australia.

As China’s growth has slowed, confidence about the trajectories of both the Australian and Chinese economies over the next five years has softened, and Australians are divided on whether the Chinese economy is growing or slowing. In 2020, around half (49%) say ‘China’s economy will slow down and the Australian economy will suffer’, an increase of five points from 2016.

A similar number (48%) say ‘China’s economy will continue to grow strongly and this will benefit Australia’. The view that China’s economy would continue to grow and benefit Australia was held by the majority of Australians (52%) in 2016.

Eight in ten Australians support sanctions on Chinese officials associated with human rights abuses

SAFETY, SECURITY AND THREATS TO AUSTRALIA'S VITAL INTERESTS

Feelings of safety

The global COVID-19 pandemic appears to have taken a heavy toll on Australians' sense of security. Only half of Australians (50%) say they feel safe in 2020. This is a record low in the history of the Lowy Institute Poll, and a 28-point drop from 2018. By comparison, 92% of Australians said they felt either safe or very safe during the global financial crisis.

Threats to Australia's vital interests

Concern about non-traditional security threats appears to have eclipsed that of traditional security threats for Australians in 2020. COVID-19 and 'drought and water shortages' are seen as the top threats to Australia's vital interests in the next ten years. Three-quarters say 'novel coronavirus (COVID-19) and other potential epidemics' (76%) and 'drought and water shortages' (77%) pose critical threats to Australia's vital interests. In 2008, only 47% of Australians saw 'AIDS, avian flu and other potential epidemics' as a critical threat.

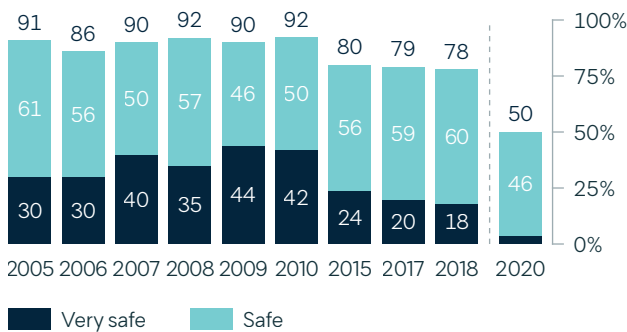
With a global recession looming in the aftermath of the COVID-19 pandemic, concern about the economy has risen sharply. In 2020, 71% say that 'a severe downturn in the global economy' is a critical threat, a 20-point increase from 2019. This aligns with unprecedented low levels of optimism about Australia's economic performance (see page 18).

Along with the threat of drought, most Australians say 'environmental disasters such as bushfires and floods' (67%) and 'climate change' (59%) both pose critical threats. As in past years, a significant gap exists between younger and older Australians' views of climate change as a critical threat. Seven in ten Australians aged 18–44 (70%) say climate

FIGURE 11

Feelings of safety

Now about world events, how safe do you feel?



Dashed line indicates change in mode: see Methodology, p.46.

change is a critical threat, compared with 49% of those over 45. Similarly, 76% of aged 18–44 Australians see 'environmental disasters such as bushfires and floods' as a critical threat, compared with 59% of Australians aged 45 and over.

After a spike in concern about foreign interference in 2019, coinciding with a federal election year in Australia, 42% now say 'foreign interference in Australian politics' is a critical threat, a seven-point drop from 2019. Concern about the dissemination of false information and fake news has not shifted from 2018, with 44% saying this poses a critical threat. Only four in ten Australians (41%) say 'the rise of authoritarian systems of government around the world' is a critical threat.

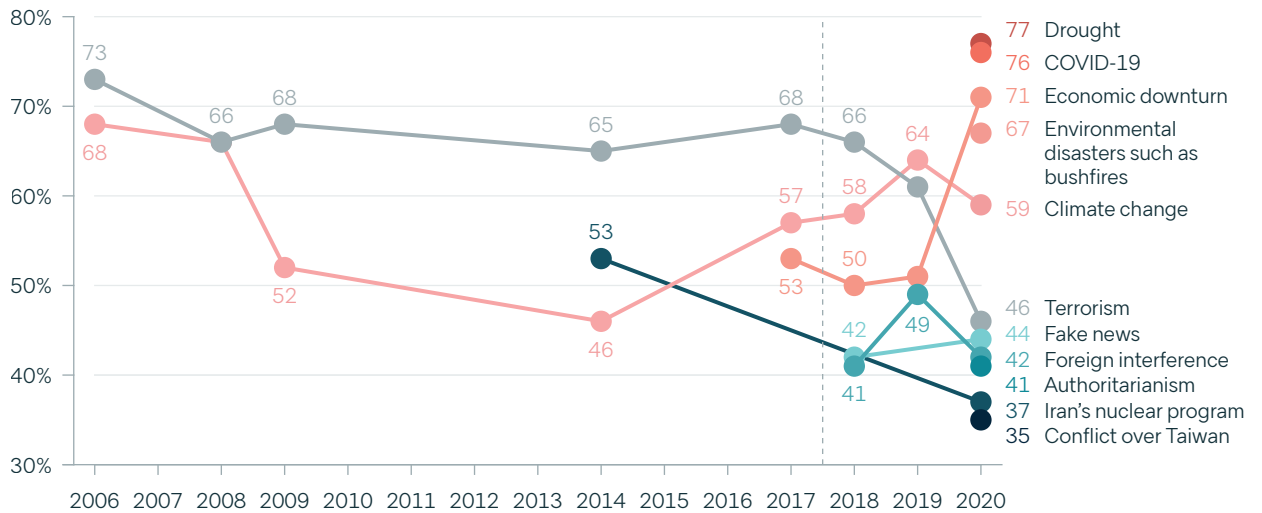
Despite highly publicised terrorist attacks in 2019 in New Zealand, Sri Lanka and elsewhere, only 46% say international terrorism poses a critical threat, down 15 points from 2019. A third of Australians (37%) say Iran's nuclear program is a critical threat, a 16-point decline from 2014. A similar number (35%) see 'a military conflict between the United States and China over Taiwan' as a critical threat to Australia's interests.

FIGURE 12

Threats to Australian interests – historical

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.

% that see the issue as a critical threat

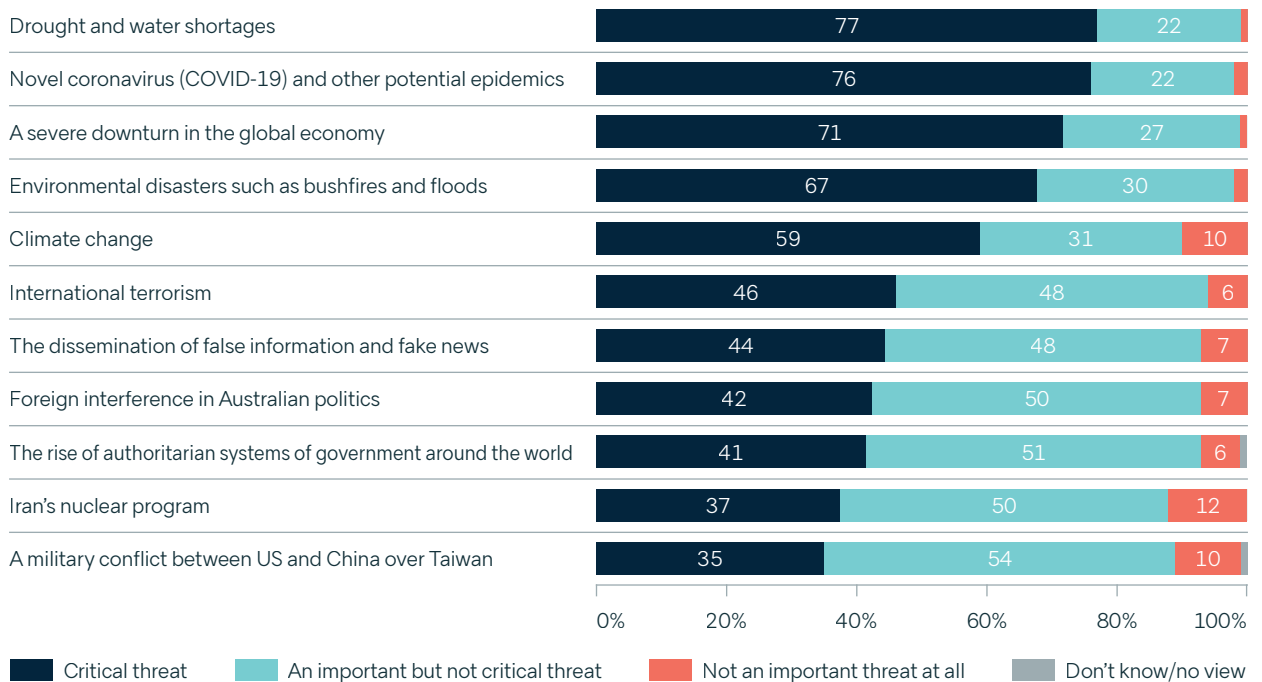


Dashed line indicates change in mode: see Methodology, p.46.

FIGURE 13

Threats to Australian 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.



AUSTRALIA'S ECONOMY AND FREE TRADE AGREEMENTS

Economic optimism

Facing the prospect of a global economic downturn of a severity not seen since the Great Depression, Australians' optimism about the economy has fallen to record lows, although a slight majority (52%) remain optimistic. This is the lowest level of optimism recorded in the history of the Lowy Institute Poll. It represents a 13-point fall from 2019, and is 34 points lower than the high point in 2009 and 2010 (86%). Only 3% of respondents say they are 'very optimistic' about Australia's economy.

Optimism about the economy has fallen to record lows

Free trade agreements

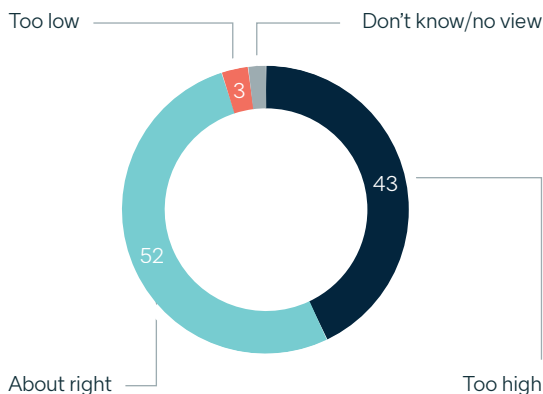
Australia is in the process of negotiating several free trade agreements, including with the United Kingdom, European Union, and India. In 2020, a majority of Australians say that proposed free trade agreements with the European Union (58%) and the United Kingdom (56%) would be good for Australia.

However, Australians are more divided about a free trade agreement with India. Four in ten Australians (44%) say that a free trade agreement with India would be good for Australia, while 28% say it would make no difference and 24% say it would be bad for Australia.

FIGURE 14

International students

Thinking about the numbers of international students enrolled at Australian universities, do you think the numbers are too high, about right, or too low?



International students

The reliance of Australian universities on overseas students has been a subject of increasing debate over the past year. This issue has only become more significant as travel restrictions have dramatically reduced university revenues in 2020. A majority of Australians (52%) say the number of international students enrolled at Australian universities is about right. Four in ten (43%) say the number is too high, while only 3% say international enrolments are too low at Australian universities.

Older Australians appear to be more concerned about international students, however. Half of those aged over 45 (52%) say that the number of international students is too high, compared with 34% of Australians aged between 18 and 44.

FIGURE 15
Economic optimism about Australia's performance in the world

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?

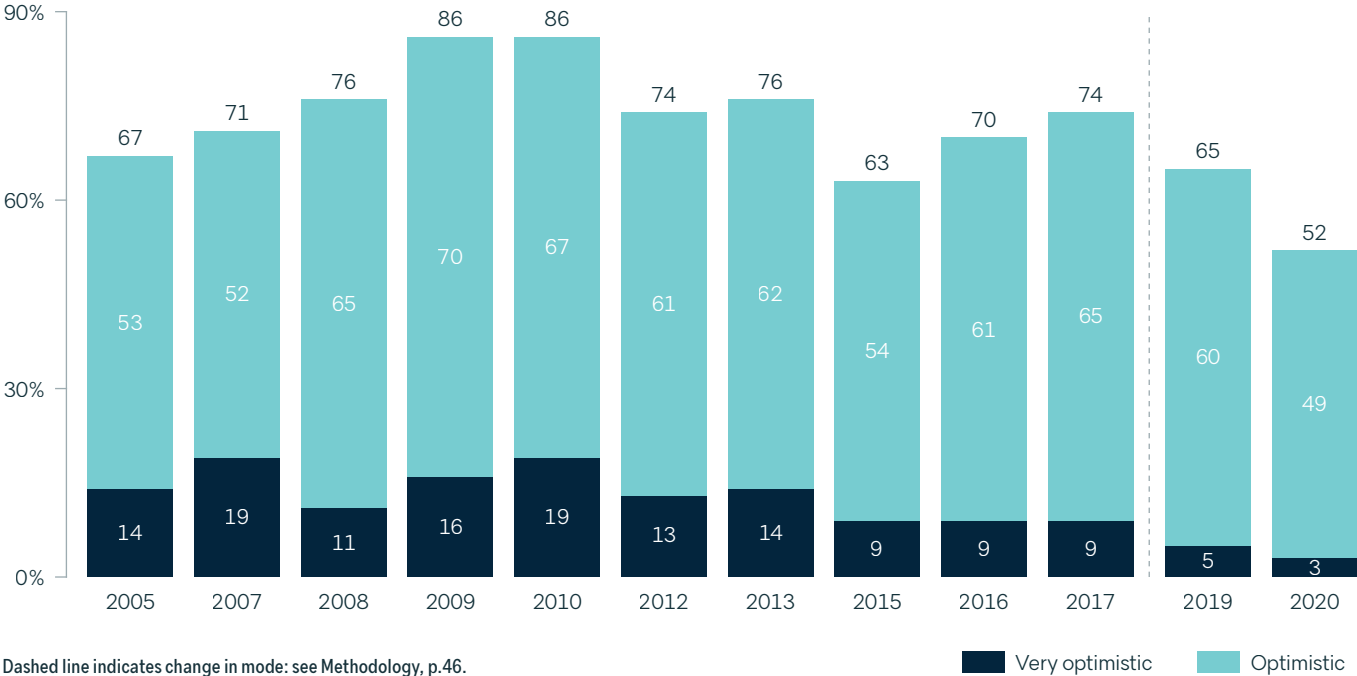
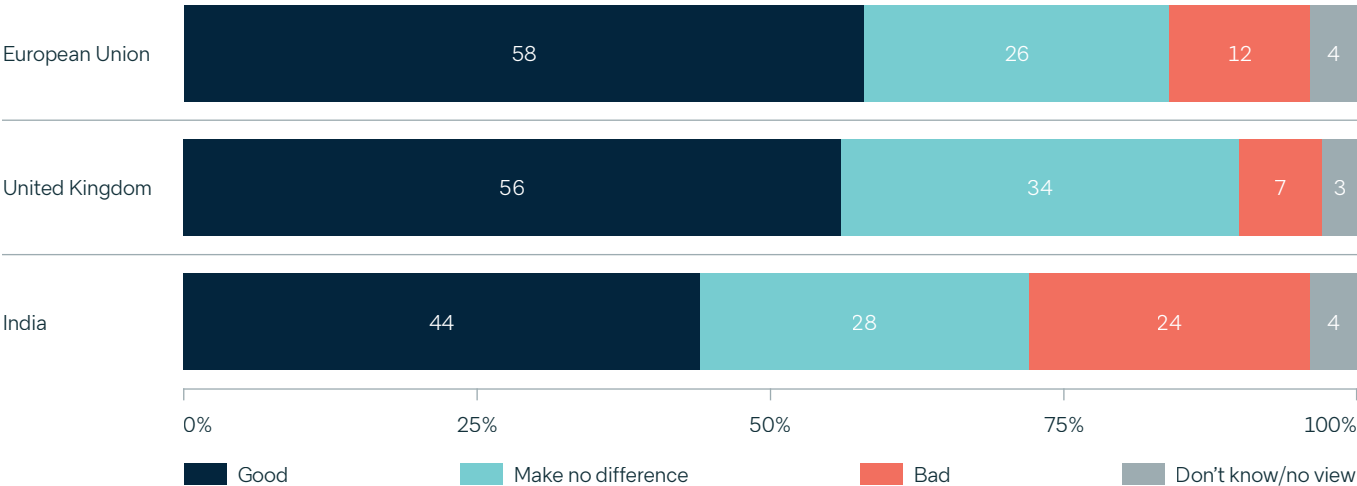


FIGURE 16
Free trade agreements

Thinking now about Australia's approach to negotiating free trade agreements. On balance, do you think signing a free trade agreement with [...] would be good or bad for Australia, or would it make no difference?



CLIMATE CHANGE AND GLOBAL WARMING

The majority of Australians (59%) continue to view climate change as a critical threat to Australia's vital interests in the coming decade. Both 'drought and water shortages' and 'environmental disasters such as bushfires and floods' were among the top-ranked threats in 2020 (see page 16). However, some concern about climate change may have been overshadowed by the COVID-19 pandemic and resulting economic uncertainty.

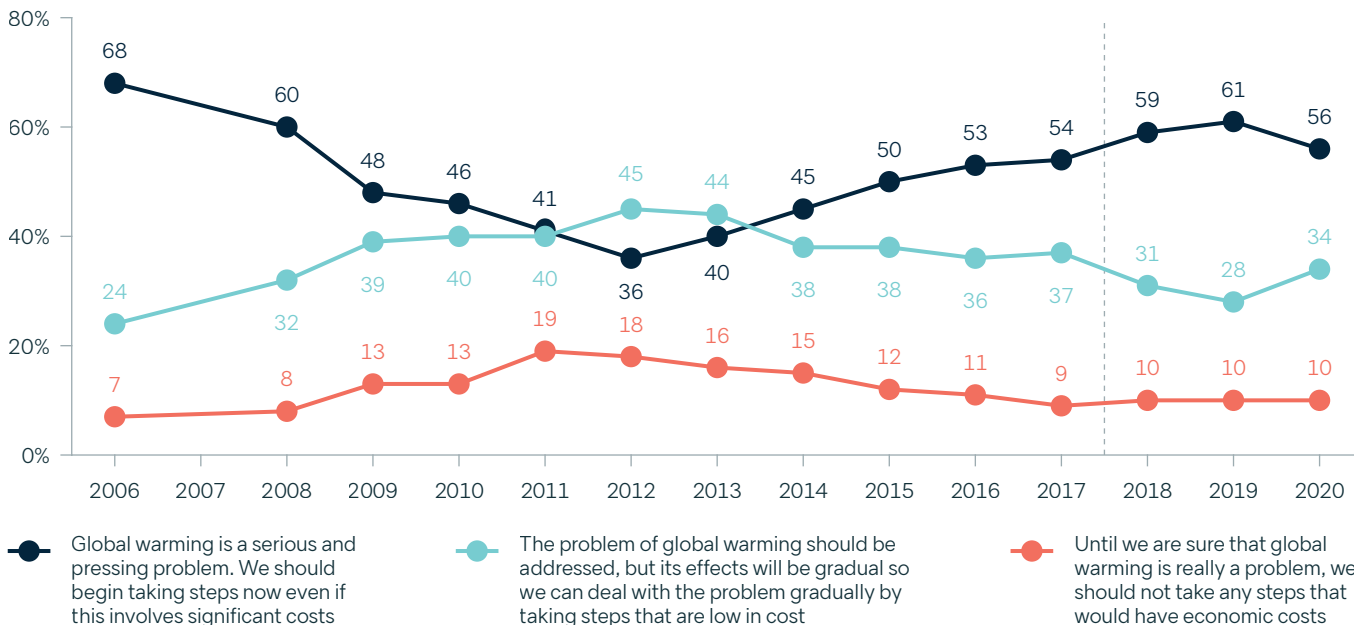
In 2020, 56% of Australians say 'global warming is a serious and pressing problem. We should begin

taking steps now even if this involves significant costs.' This is five points lower than in 2019, and 12 points below the peak of concern in 2006 when 68% expressed this view. The level of concern remains 20 points higher than the low point of 36% in 2012.

The urban population expresses higher levels of concern about global warming. Six in ten (59%) Australians living in capital cities see global warming as a serious and pressing problem, compared with 50% of the regional and remote population.

FIGURE 17
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.

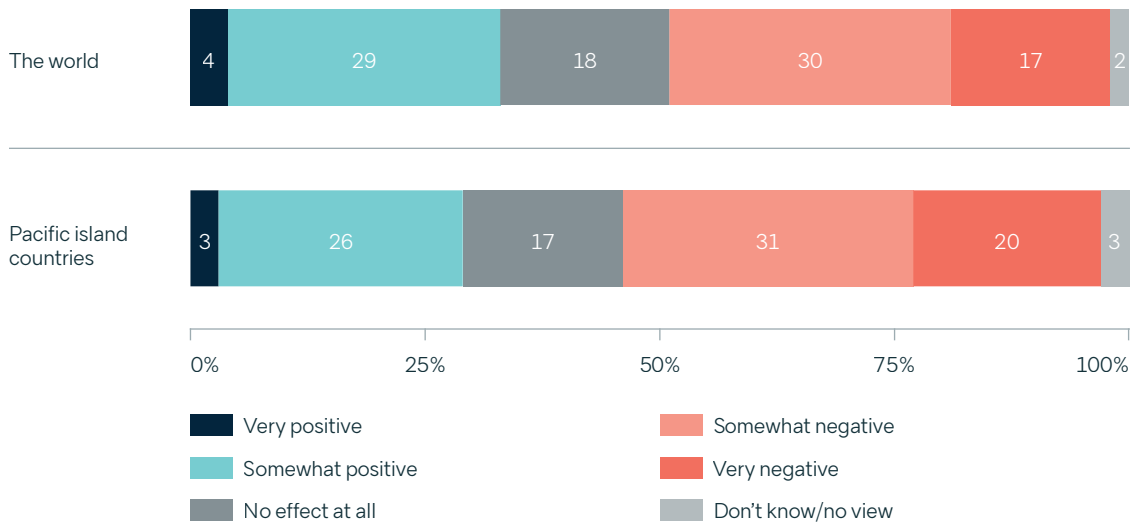


Dashed line indicates change in mode: see Methodology, p.46.

FIGURE 18

Australia’s climate policies and international reputation

In your opinion, what effect, if any, has Australia’s approach to climate change had on its reputation in the world and on its relationship with Pacific island countries?



The generational split between older and younger Australians about climate change is narrowing slightly. Two thirds (66%) of Australians aged 18–44 say that ‘global warming is a serious and pressing issue’ about which ‘we should begin taking steps now’, compared with 46% of Australians aged over 45. This gap has reduced to a 20-point difference, compared with 27 points in 2019. The gap widens to 30 points when comparing the youngest age group of 18–29 years with the oldest age group of Australians over 60 (73% and 43% respectively).

Half say Australia’s approach to climate change has negatively affected our reputation in the world

After news of Australia’s bushfire crisis last summer was broadcast around the world, many Australians

say the country’s approach to climate change has had a negative impact on Australia’s reputation.

Almost half of Australians (47%) say that Australia’s approach to climate change has had either a very or somewhat negative effect on Australia’s reputation in the world. One third (33%) say that Australia’s approach has had a positive effect, and 18% say that it has had no effect on Australia’s reputation at all.

The numbers are similar when it comes to Australia’s relations in the Pacific: half the population (51%) say Australia’s approach to climate change has had a somewhat or very negative effect on Australia’s relations with Pacific island countries. Less than a third (29%) say that Australia’s approach to climate change has had a positive effect on these relations, and 17% say there has been no effect at all.

COVIDPOLL: ATTITUDES TO THE CORONAVIRUS PANDEMIC

Australian views on responses to COVID-19

As the COVID-19 pandemic continues around the world, Australians are extremely confident in Australia's response but unimpressed by the performance of many global powers and, in particular, that of the United States. While nine out of ten Australians (93%) say Australia has handled the outbreak very or fairly well so far, only 10% say the same thing about the United States.

According to Australians, China has outperformed America, with 31% saying China has handled the outbreak very or fairly well. Among other countries polled, most Australians (79%) also say Singapore has handled COVID-19 very or fairly well. The virus has taken a heavy toll in the United Kingdom and Italy, and less than a third of Australians say that the United Kingdom (30%) has handled the outbreak well, while only 15% say Italy has handled it well. The United States is last on the list of countries, with only 10% of Australians saying it has handled the outbreak very or fairly well so far.

This negative assessment of the United States' management of the crisis coincides with mixed views of the United States' power in the world. In 2020, the majority of Australians (53%) say that the United States will be less powerful than it was before the crisis. This is 20 points higher than the response in 2009 after the global financial crisis, when a third (33%) said the United States would be less powerful than it was before the crisis. Four in ten Australians (41%) say the United States will be just as powerful as before the crisis, while 6% say the United States will be more powerful.

When considering the US presidential election in November, seven in ten Australians (73%) prefer former Vice President Joe Biden as the next US President, equal to Australian support for Barack Obama's candidacy in 2008.⁶ Although US handling of the coronavirus crisis is seen very negatively, support for the presidency of Donald Trump has increased from a low base, with 23% favouring his bid for re-election in 2020, a 12-point jump from Australians' views prior to the 2016 US election.

The COVID-19 crisis has tempered Australians' expectations of China's power in the future. While a third (37%) say China will be more powerful than it was before the crisis, this is much lower than the 72% who said in 2009 that China would be more

powerful after the global financial crisis. A third (36%) also now say China will be just as powerful, with 27% saying China will be less powerful than it was before the crisis.⁷

China's response to the coronavirus pandemic and its system of government as an authoritarian one-party state has been subject to heightened scrutiny in Australia. When thinking about China's handling of the coronavirus outbreak, most Australians (68%) feel less favourably towards China's system of government. A quarter (27%) say they feel the same about China's system of government, while 5% say they are more favourable.

With parts of Europe hit hard by the virus, Australians are divided about its future. Around half (48%) say Europe's power will be reduced after the COVID-19 crisis, almost the same number (46%) say it will be just as powerful as before the crisis, and 5% say Europe will be more powerful.

FIGURE C1
China's system of government

Thinking about the way China has handled the COVID-19 coronavirus outbreak, are you more or less favourable towards China's system of government?

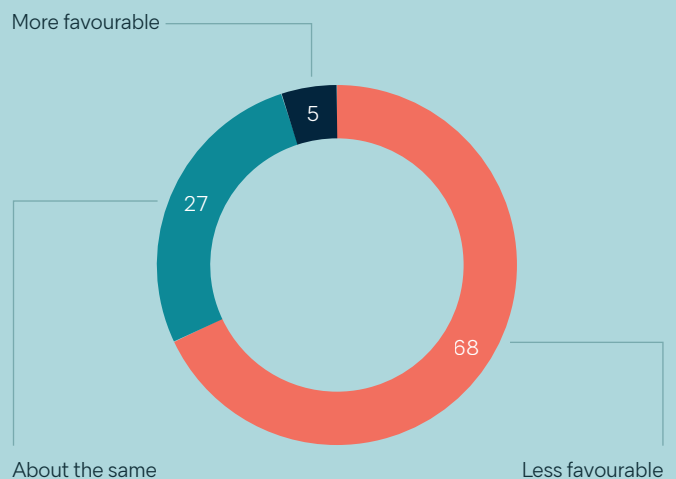


FIGURE C2

Global responses to COVID-19

Overall, how well or badly do you think each of the following countries have handled the COVID-19 coronavirus outbreak so far?

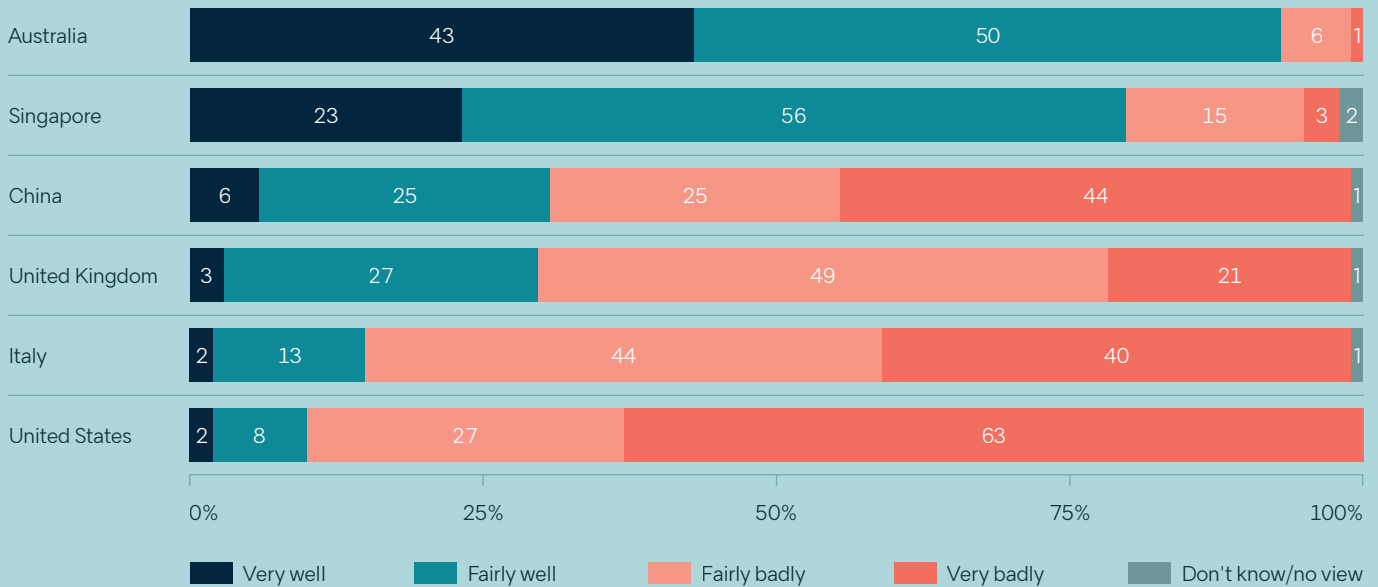
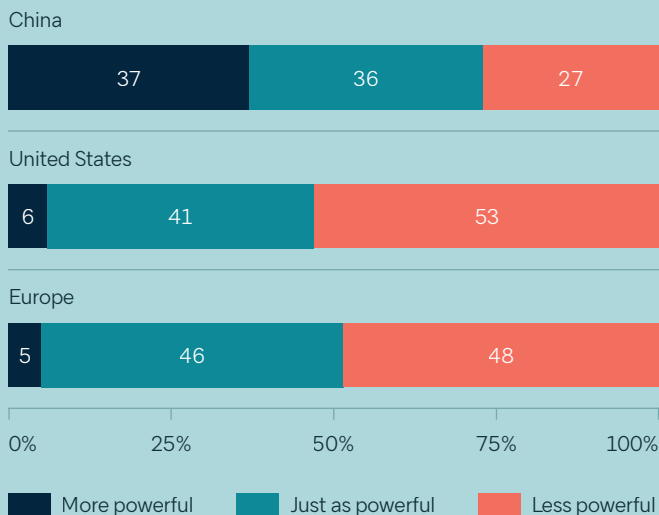


FIGURE C3

Global power in the post-crisis period

The world is currently going through a severe health and economic crisis. When the world recovers from this crisis do you think each of the following will be more powerful, less powerful or will they be just as powerful as they were before the crisis?



Globalisation

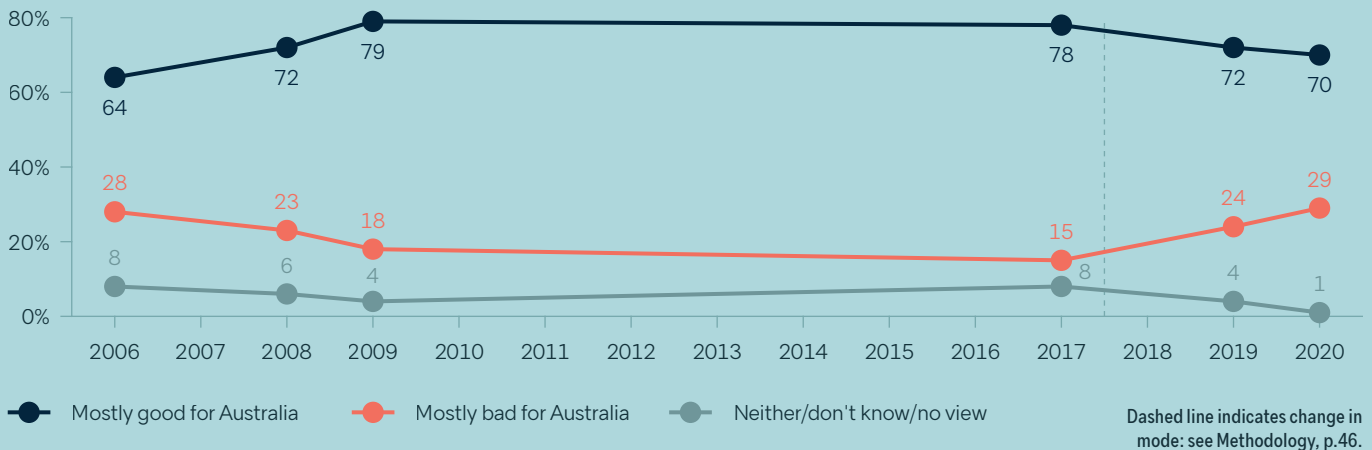
Australians have tended to avoid trends of protectionist and anti-globalisation sentiment, and despite the ongoing pandemic which has affected every part of the world, their embrace of globalisation endures. Seven in ten (70%) say that globalisation is ‘mostly good for Australia’, which has not changed significantly from 2019. There is a gap, but only slight, between urban and regional populations. Residents of urban parts of Australia are slightly more supportive of globalisation (72% saying it is mostly good) than their regional and remote counterparts (65% saying mostly good).

At a time where many countries are focused on their own domestic situations, Australians are calling for more global cooperation in response to international crises. More than half (53%) say ‘we need more global cooperation, rather than every country putting their own interests first’. Only a third (31%) say ‘the balance between global cooperation and the interests of individual countries is about right’. And even fewer (16%) say ‘we need less global cooperation. Every country should put their own interests first.’

FIGURE C4

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?



Australians have always been travellers: they take more than 11 million trips overseas each year and approximately one million Australians live and work overseas at any given time.⁸ The majority appear undeterred by the pandemic, with 59% of Australians saying that they are just as likely to travel as before, once the pandemic is contained. Only 6% say they are more likely to travel once the pandemic is contained, and 35% say they are less likely to travel than before the outbreak.

FIGURE C5

Willingness to travel

Thinking about when the COVID-19 coronavirus outbreak is contained in the future, are you more or less likely to travel overseas than you were prior to the outbreak?

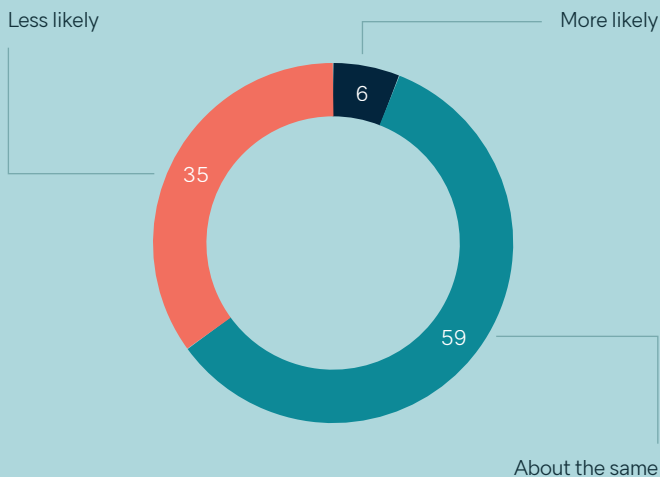
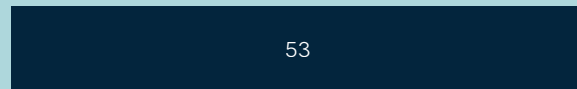


FIGURE C6

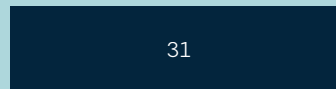
Global cooperation

How has the COVID-19 coronavirus outbreak changed your view, if at all, on global responses to international crises?

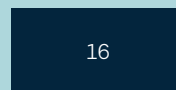
We need more global cooperation rather than every country putting their own interests first



The balance between global cooperation and the interests of individual countries is about right



We need less global cooperation. Every country should put their own interests first



0% 20% 40% 60%

FIGURE C7

Sources of information

During the COVID-19 coronavirus outbreak, which of the following do you prefer as your source of information? (select up to three choices)

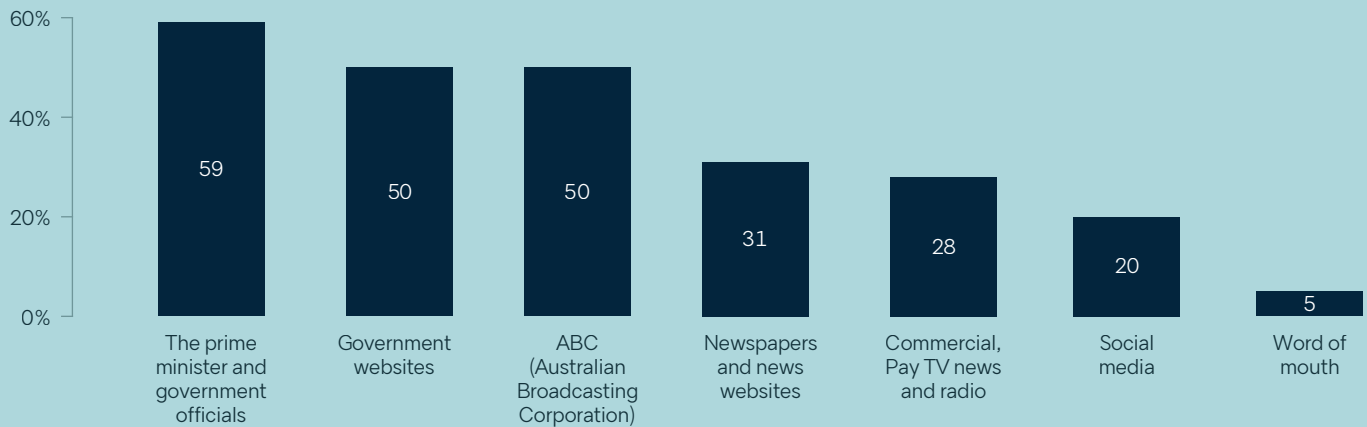


FIGURE C8

The response of authorities

Thinking now about the COVID-19 coronavirus outbreak. Are you confident or not confident that each of the following is doing a good job responding to the coronavirus outbreak?

Chief medical officers



Your state or territory government



Australia's federal government



World Health Organisation



0% 25% 50% 75% 100%

Very confident Somewhat confident
Not too confident Not at all confident

Perceptions of authority and sources of information

Although Australians are supportive of increased global cooperation, more have expressed confidence in Australian authorities than in the World Health Organization. Almost all of the population express confidence in the performance of chief medical officers, with 92% very or somewhat confident they are ‘doing a good job’. Most (86%) are confident the state and territory governments are doing a good job, and 82% are very or somewhat confident the federal government is doing a good job in responding to the coronavirus outbreak. A smaller majority (59%) express confidence that the WHO is ‘doing a good job responding to the coronavirus outbreak’.

Aligning with the confidence they express in the crisis response of the government, a majority of Australians (59%) say the prime minister and government officials are a preferred source of information. The ABC and government websites are preferred sources of information for half the country (50%) during the COVID-19 outbreak. Less than a third of Australians regard newspapers and news websites (31%) and commercial, pay TV news and radio (28%) as preferred sources. Only one in five Australians (20%) prefer social media for information about COVID-19, and 5% prefer information by word of mouth.

AUSTRALIA'S FOREIGN POLICY AND INTELLIGENCE AGENCIES

Australia's intelligence and law enforcement agencies

A convincing majority of Australians (80%) agree that Australia's intelligence agencies are effective at protecting Australia's national security. In recent years, intelligence agencies have taken some steps towards improving transparency. The Independent National Security Monitor wrote in a recent annual report that 'unnecessary secrecy can be seriously counter-productive'.⁴

In 2020, the majority (59%) say that Australia's intelligence agencies 'have got the balance right

between protecting national security and also being appropriately transparent with the Australian people about their activities'.

A solid majority (59%) also believe the Australian government 'has got the balance right between the need for press freedom and the need to enforce the law and protect national security', despite the highly-publicised raids in mid-2019 on journalists and their sources that kindled debate about press freedom in Australia.⁵

FIGURE 19

Australia's intelligence agencies

Now about Australia's intelligence activities and national security. For each of the statements below, please indicate whether you agree or disagree.



Australia's foreign policy, global cooperation, and values

In considering Australia's foreign policy, there can sometimes be a clash between economic interests and democratic values. Asked about priorities for Australia in this situation, six in ten Australians (60%) say that Australia's democratic values are more important, whereas more than one third (38%) say that economic interests are more important. In a similar question asked more than a decade ago in 2007, three quarters of the country (74%) said that 'democratic or humanitarian values' were more important, compared to 18% selecting 'economic or political interests'. This indicates an increased emphasis on economic interests in the past decade.

There can also be clashes between the domestic interests of individual countries and the wider interest in solving global problems, when countries

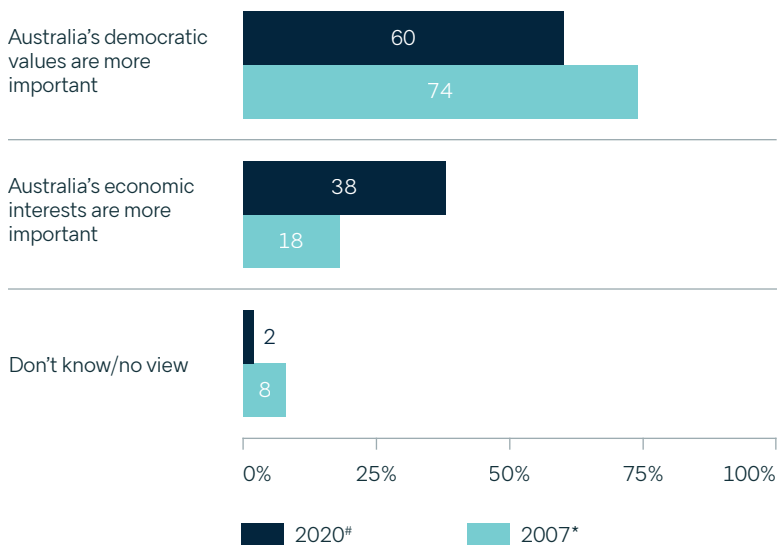
debate a global agreement in an international or multilateral institution such as the United Nations. In 2020, two thirds of Australians (66%) say the government 'should prioritise Australia's domestic interests over reaching a global agreement'. A third (31%) say that reaching global agreement should be prioritised over Australia's domestic interests.

However, this sentiment, recorded during fieldwork in March, may have shifted during the COVID-19 pandemic. Responding to COVIDpoll in April, 53% say 'we need more global cooperation and less focus on the interests of individual countries during global crises', while only 16% believe 'every country should put their own interests first'; 31% say the balance is 'about right'. Australians have tended to avoid recent trends of protectionist sentiment: in COVIDpoll, seven in ten Australians (70%) say that globalisation is mostly good for Australia, unchanged from 2019 (see page 23).

FIGURE 20

Australia's values and foreign policy

In foreign policy, there can sometimes be a clash between Australia's economic interests and Australia's democratic values. When that happens, should economic interests or democratic values be considered more important?



Note change in mode: see Methodology, p.46.

* In 2007, the question asked was 'In dealing with international problems, there can sometimes be a clash between Australia's economic or political interests and Australia's democratic or humanitarian values. When that happens, should interests or values be considered more important?'

FIGURE 21

Domestic interests and global cooperation

When trying to address global problems, there can sometimes be a clash between Australia's domestic interests and a global agreement being debated within an international institution. If that happens, what do you think the Australian government should do?

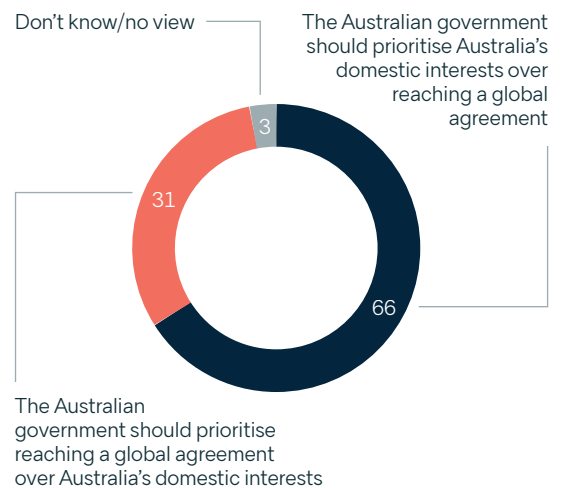
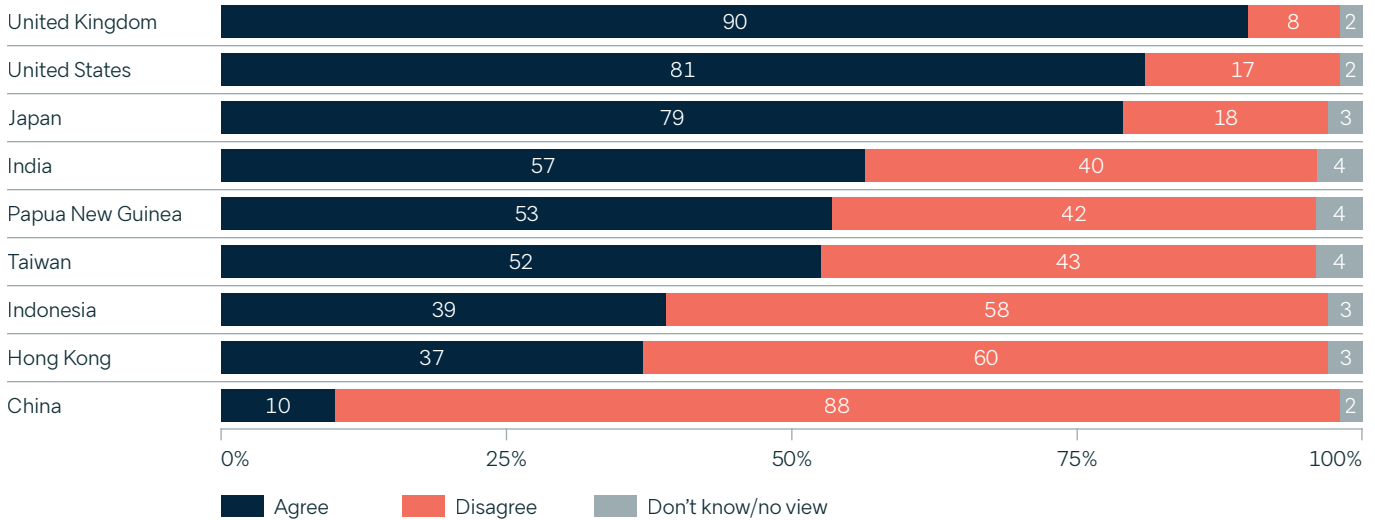


FIGURE 22

Democracies around the world

Here is a list of countries and territories. For each one, please indicate whether you agree or disagree that the country or territory is a democracy.



Democracies around the world

Since 2013, the Lowy Institute Poll has revealed low levels of awareness in Australia about the system of government in Indonesia. Most Australians have consistently said Indonesia is not a democracy, even though it transitioned from an authoritarian regime in 1998. In 2020, the Lowy Institute polled Australians on systems of government around the world to compare the results with this longstanding sentiment towards Indonesia.

Australians seem more aware of other democracies, both in and outside Asia. Nine in ten Australians (90%) say the United Kingdom is a democracy, and eight in ten (81%) say the same about the United States. A similar number (79%) recognise Japan as a democracy. Although the relationship between Australia and India, the world's largest democracy, is often seen as underdeveloped, more than half (57%) say India is a democracy. The majority also see Papua New Guinea (53%) as a democracy. Half the country (52%) agree Taiwan is a democracy, with presidential elections in Taiwan taking place shortly before fieldwork for this Poll took place.

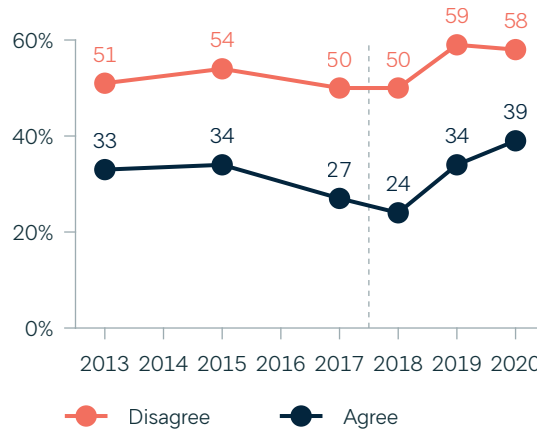
In 2020, the number of Australians that agree Indonesia is a democracy has reached a high point of 39%, in a five-point increase from 2019. Only a

third of Australians (37%) agree that Hong Kong is a democracy, after the pro-democracy protests in Hong Kong made headlines throughout 2019. Although the Chinese government has described itself as a 'socialist democracy' or a 'people's democracy', only 10% of Australians agree that China is a democracy.

FIGURE 23

Indonesia and democracy

Please indicate whether you agree or disagree that Indonesia is a democracy.



Dashed line indicates change in mode: see Methodology, p.46.

FEELINGS THERMOMETER

Canada leads the feelings thermometer in 2020, which measures Australians' perceptions about countries, territories, and institutions on a scale of 0° (coldest feelings) to 100° (warmest feelings). Canada receives a very warm 79°, a five degree fall from 2018. Warmth towards the United Kingdom, despite its departure from the European Union, still sits steady at 74°, although eight degrees lower than in 2018. Feelings towards the European Union have cooled somewhat, down six degrees from 2019, although they remain at a warm 60°.

This year the highest-ranked countries in the region are Japan and Fiji, at a very warm 69° and 68° respectively. Feelings towards the United States in 2020 sit at 62°, steadying after a cooling trend since 2015. This result is not significantly different to the results in 2006 and 2007, the coolest results for the United States in the history of Lowy Institute polling. The United Nations registers a warmish 61° on the thermometer, steady from 2016.

After a year of democracy protests, feelings towards Hong Kong have cooled by five degrees to 58° in 2020. Views of Taiwan have remained stable at 57°. Feelings towards China have fallen sharply again this year. After a nine-degree fall in 2019, China has registered a further ten-degree drop to 39° in 2020. Both of these consecutive falls in sentiment represent the greatest single-year declines in the history of the Lowy Institute Poll feelings thermometer.

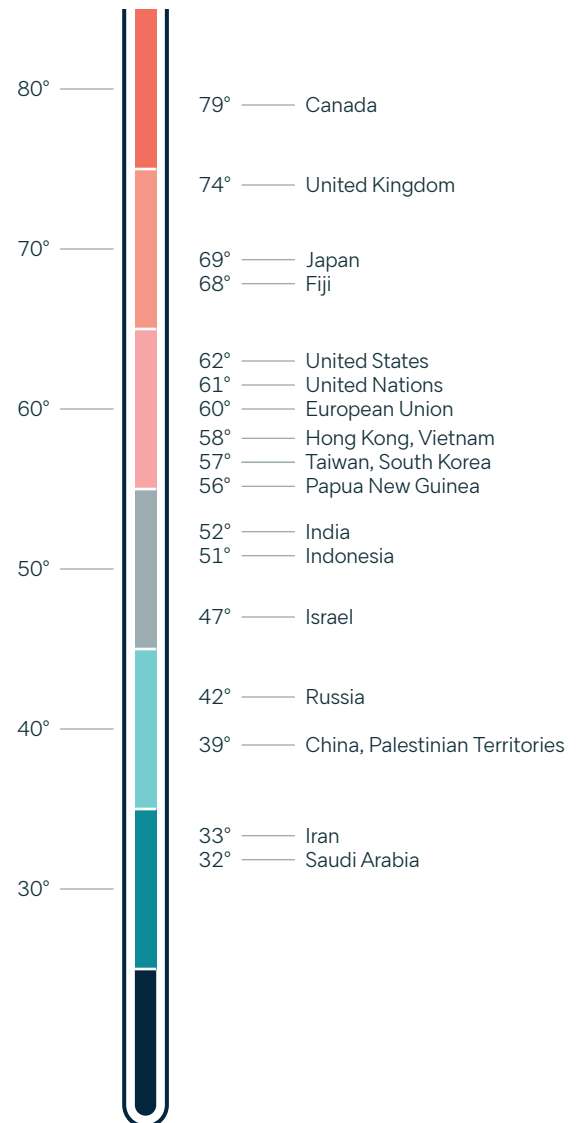
Feelings towards Vietnam and Papua New Guinea are consistent at 58° and 56°. Australian sentiment towards South Korea remains warm at 57°, although five degrees cooler than in 2018. Both India and Indonesia receive lukewarm results of 52° and 51°.

Russia continues to receive a cool response from the Australian public at 42°, 13 degrees lower than its scores in 2008 and 2010. Australian sentiment towards the Palestinian Territories is at 39°, eight degrees cooler than feelings towards Israel (47°). Iran and Saudi Arabia were at the bottom of the feelings thermometer in 2020, both receiving very cool results of 33° and 32°.

FIGURE 24

Feelings thermometer

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.



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. For more information on the methodology of the Lowy Institute Poll, including changes in mode from 2018 onwards, see page 46.

TABLE 1

Trust in major powers

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

2020 (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	24%	60%	84%	13%	3%	16%	0%
Japan	22%	60%	82%	15%	4%	19%	0%
United States	12%	39%	51%	34%	15%	49%	0%
India	4%	41%	45%	42%	13%	55%	0%
Indonesia	2%	34%	36%	48%	16%	64%	0%
Russia	2%	22%	24%	43%	32%	75%	0%
China	4%	19%	23%	39%	38%	77%	0%

	A great deal								Total: 'a great deal' and 'somewhat'							
	2006	2008	2009	2011	2017	2018	2019	2020	2006	2008	2009	2011	2017	2018	2019	2020
United Kingdom	-	-	-	-	50%	45%	-	24%	-	-	-	-	90%	90%	-	84%
Japan	19%	15%	33%	30%	31%	33%	-	22%	73%	68%	81%	83%	86%	87%	-	82%
United States	19%	24%	39%	40%	20%	15%	14%	12%	60%	69%	83%	83%	61%	55%	52%	51%
India	9%	8%	10%	7%	9%	8%	-	4%	68%	55%	61%	61%	64%	59%	-	45%
Indonesia	-	-	6%	5%	5%	-	-	2%	-	-	45%	46%	52%	-	-	36%
Russia	-	7%	7%	7%	5%	3%	-	2%	-	53%	59%	53%	38%	28%	-	24%
China	7%	7%	7%	12%	8%	7%	4%	4%	60%	47%	59%	60%	54%	52%	32%	23%

TABLE 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.

	2020 (ranked by total saying '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
New Zealand Prime Minister Jacinda Ardern	52%	35%	87%	9%	3%	12%	0%	0%
Japanese Prime Minister Shinzo Abe	12%	61%	73%	20%	4%	25%	1%	1%
Australian Prime Minister Scott Morrison	21%	39%	60%	26%	14%	40%	0%	0%
Australian Opposition leader Anthony Albanese	10%	48%	58%	32%	9%	41%	1%	0%
UK Prime Minister Boris Johnson	10%	45%	55%	32%	12%	44%	1%	0%
Indian Prime Minister Narendra Modi	4%	38%	42%	42%	14%	56%	2%	0%
Indonesian President Joko Widodo	2%	30%	32%	48%	18%	66%	2%	1%
US President Donald Trump	9%	21%	30%	27%	43%	70%	0%	0%
Chinese President Xi Jinping	3%	19%	22%	37%	40%	77%	1%	0%
North Korean leader Kim Jong-un	1%	5%	6%	19%	75%	94%	0%	1%

	Total: 'a lot of' and 'some' confidence		
	2018	2019	2020
New Zealand Prime Minister Jacinda Ardern	–	88%	87%
Japanese Prime Minister Shinzo Abe	66%	–	73%
Australian Prime Minister Scott Morrison (Malcolm Turnbull 2018)	63%	58%	60%
Australian Opposition leader Anthony Albanese (Bill Shorten 2019)	–	52%	58%
UK Prime Minister Boris Johnson (Theresa May 2018)	68%	–	55%
Indian Prime Minister Narendra Modi	37%	–	42%
Indonesian President Joko Widodo	–	34%	32%
US President Donald Trump	30%	25%	30%
Chinese President Xi Jinping	43%	30%	22%
North Korean leader Kim Jong-un	5%	7%	6%

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TABLE 3

Major power relations

Thinking about Australia's relationships with the United States and China. Which relationship do you think is more important to Australia?

	2013	2016	2017	2020
Australia's relationship with the United States	48%	43%	45%	55%
Australia's relationship with China	37%	43%	43%	40%
Both equally	10%	9%	7%	4%
Neither	1%	2%	1%	1%
Don't know	4%	3%	3%	1%

TABLE 4

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	2020
Very important	45%	42%	36%	42%	55%	56%	59%	59%	54%	52%	53%	42%	53%	48%	38%	43%
Fairly important	27%	28%	27%	34%	30%	30%	23%	28%	28%	26%	27%	29%	24%	28%	34%	35%
Total: very and fairly important	72%	70%	63%	76%	85%	86%	82%	87%	82%	78%	80%	71%	77%	76%	72%	78%
Somewhat important	20%	22%	27%	20%	12%	12%	15%	12%	16%	17%	16%	22%	18%	20%	23%	18%
Not at all important	7%	8%	9%	4%	2%	2%	3%	1%	3%	4%	4%	7%	4%	4%	4%	4%
Don't know/no view	1%	1%	1%	0%	0%	0%	0%	0%	0%	0%	1%	1%	1%	1%	0%	1%

TABLE 5

President Trump's policies

Here are some policies of US President Donald Trump. Please indicate whether you approve or disapprove of each one:

	Approve	Disapprove	Neither/no view
Negotiating with North Korean leader Kim Jong-un about the country's nuclear weapons program	66%	33%	2%
Improving relations with Russian President Vladimir Putin	63%	35%	2%
Increasing tariffs on imported goods from other countries	35%	62%	2%

<i>President Trump's policies (cont.)</i>	Approve	Disapprove	Neither/no view
Criticising the defence spending of allies of the US	24%	73%	3%
Withdrawing the US from negotiations to form a free trade agreement between 11 Asia-Pacific countries including Australia	22%	75%	3%
Withdrawing the US from international climate change agreements	19%	80%	1%

TABLE 6
Acting in accordance with the US alliance

Here are a number of statements about Australia and the US alliance. For each one please indicate whether you personally agree or disagree:

	2013					2020				
	Strongly agree	Agree	Disagree	Strongly disagree	Don't know/no view	Strongly agree	Agree	Disagree	Strongly disagree	Don't know/no view
Despite the alliance, Australia should only support US military action if it is authorised by the United Nations	50%	26%	11%	11%	2%	16%	52%	24%	6%	2%
Australia should act in accordance with our security alliance with the US even if it means supporting US military action in the Middle East, for example, against Iran	20%	28%	25%	26%	1%	6%	34%	44%	14%	2%
Australia should act in accordance with our security alliance with the US even if it means supporting US military action in Asia, for example, in a conflict between China and Taiwan ^a	12%	26%	31%	29%	3%	6%	28%	49%	14%	2%

^a In 2013, the question asked about US military action in Asia, for example in a conflict between China and Japan.

TABLE 7
Australia's partnerships with other democracies

Thinking now about Australia's partnerships in the world. Would you support or oppose Australia forming a four-way partnership with the democracies of India, Japan, and the United States to promote peace and security in the region?

	2020
Support	88%
Oppose	10%
Don't know	1%

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TABLE 8

China – an economic partner or a security threat

Thinking now about Australia and China. In your own view, is China more of an economic partner to Australia or more of a security threat to Australia?

	2015	2017	2018	2020
More of an economic partner	77%	79%	82%	55%
More of a security threat ^b	15%	13%	12%	41%
Both equally	4%	5%	0%	3%
Neither	2%	0%	3%	0%
Don't know/no view	3%	3%	3%	1%

^bIn 2015, 2017, and 2018, the question asked if China was more of a 'military threat'.

TABLE 9

Australian government policies towards China

Would you support or oppose the following Australian government policies towards China?

	Support	Oppose	Don't know/no view
Working to find other markets for Australia to reduce our economic dependence on China	94%	5%	1%
Imposing travel and financial sanctions on Chinese officials associated with human rights abuses	82%	17%	1%
Jointly funding aid projects with China in the Pacific and Asia	59%	39%	1%
Restricting joint scientific research between Australia and China in defence and security-related fields	57%	41%	2%
Allowing Chinese companies to supply technology for critical infrastructure in Australia	39%	58%	2%
Conducting joint military exercises with China and other countries	39%	59%	2%

TABLE 10

China's economy

Please indicate which statement most closely matches your own opinion about China's economy in the next five years:

	2016	2020
China's economy will slow down and the Australian economy will suffer	44%	49%
China's economy will continue to grow strongly and this will benefit Australia	52%	48%
Don't know/no view	5%	4%

TABLE 11

Feelings of safety

Now about world events, how safe do you feel?

	2005	2006	2007	2008	2009	2010	2015	2017	2018	2020
Very safe	30%	30%	40%	35%	44%	42%	24%	20%	18%	4%
Safe	61%	56%	50%	57%	46%	50%	56%	59%	60%	46%
Total: safe	91%	86%	90%	92%	90%	92%	80%	79%	78%	50%
Unsafe	7%	10%	8%	8%	7%	5%	16%	16%	20%	41%
Very unsafe	1%	3%	1%	1%	2%	2%	3%	5%	1%	9%
Total: unsafe	8%	13%	9%	9%	9%	7%	19%	21%	21%	50%
Don't know/no view	1%	0%	1%	0%	1%	1%	1%	1%	1%	0%

TABLE 12

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.

	2020 (ranked by percentage saying '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
Drought and water shortages	77%	22%	99%	1%	0%
Novel coronavirus (COVID-19) and other potential epidemics	76%	22%	98%	2%	0%
A severe downturn in the global economy	71%	27%	98%	1%	0%
Environmental disasters such as bushfires and floods	67%	30%	97%	2%	0%
Climate change	59%	31%	90%	10%	0%
International terrorism	46%	48%	94%	6%	0%
The dissemination of false information and fake news	44%	48%	92%	7%	0%
Foreign interference in Australian politics	42%	50%	92%	7%	0%
The rise of authoritarian systems of government around the world	41%	51%	92%	6%	1%
Iran's nuclear program	37%	50%	87%	12%	0%
A military conflict between US and China over Taiwan	35%	54%	89%	10%	1%

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Threats to vital interests (cont.)	Percentage saying 'critical threat' (ranked by 2020 responses)							
	2006	2008	2009	2014	2017	2018	2019	2020
Drought and water shortages	-	-	-	-	-	-	-	77%
Novel coronavirus (COVID-19) and other potential epidemics	-	-	-	-	-	-	-	76%
A severe downturn in the global economy	-	-	-	-	53%	50%	51%	71%
Environmental disasters such as bushfires and floods	-	-	-	-	-	-	-	67%
Climate change ['global warming' from 2006-09]	68%	66%	52%	46%	57%	58%	64%	59%
International terrorism	73%	66%	68%	65%	68%	66%	61%	46%
The dissemination of false information and fake news	-	-	-	-	-	42%	-	44%
Foreign interference in Australian politics	-	-	-	-	-	41%	49%	42%
The rise of authoritarian systems of government around the world	-	-	-	-	-	-	-	41%
Iran's nuclear program	-	-	-	53%	-	-	-	37%
A military conflict between US and China over Taiwan	-	-	-	-	-	-	-	35%

TABLE 13

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	2012	2013	2015	2016	2017	2019	2020
Very optimistic	14%	19%	11%	16%	19%	13%	14%	9%	9%	9%	5%	3%
Optimistic	53%	52%	65%	70%	67%	61%	62%	54%	61%	65%	60%	49%
Total: optimistic	67%	71%	76%	86%	86%	74%	76%	63%	70%	74%	65%	52%
Pessimistic	8%	9%	19%	11%	10%	20%	15%	29%	25%	20%	30%	38%
Very pessimistic	2%	2%	4%	2%	3%	5%	6%	5%	5%	4%	4%	10%
Total: pessimistic	10%	11%	23%	13%	13%	25%	21%	34%	30%	24%	34%	48%
Neutral ^c	21%	17%	-	-	-	-	-	-	-	-	-	-
Don't know/no view	2%	2%	1%	1%	1%	1%	3%	3%	1%	3%	1%	0%

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

TABLE 14

Free trade agreements

Thinking now about Australia’s approach to negotiating free trade agreements. On balance, do you think signing a free trade agreement with [...] would be good or bad for Australia, or would it make no difference?

	Good	Bad	Make no difference	Don’t know/no view
European Union	58%	12%	26%	4%
United Kingdom	56%	7%	34%	3%
India	44%	24%	28%	4%

TABLE 15

International students at universities

Thinking about the numbers of international students enrolled at Australian universities, do you think the numbers are too high, about right, or too low?

Too high	About right	Too low	Don’t know/no view
43%	52%	3%	2%

TABLE 16

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	2020
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%	56%
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%	34%
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%	10%
Don't know/refused	1%	0%	1%	1%	1%	1%	1%	2%	0%	0%	0%	1%	1%	0%

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TABLE 17

Australia’s climate policies and international reputation

In your opinion, what effect, if any, has Australia’s approach to climate change had (i) on its reputation in the world and (ii) on its relationship with Pacific island countries?

	2020 (ranked by total positive)							
	Very positive	Somewhat positive	Total: positive	Somewhat negative	Very negative	Total: negative	No effect at all	Don’t know/ no view
The world	4%	29%	33%	30%	17%	47%	18%	2%
Pacific island countries	3%	26%	29%	31%	20%	51%	17%	3%

TABLE 18

Australia’s intelligence agencies

Now about Australia’s intelligence activities and national security. For each of the statements below, please indicate whether you agree or disagree.

	2020 (ranked by total strongly agree and agree)						
	Strongly agree	Agree	Total: strongly agree and agree	Disagree	Strongly disagree	Total: strongly disagree and disagree	Don’t know/ no view
Australia’s intelligence agencies are effective at protecting Australia’s national security	11%	69%	80%	16%	2%	18%	2%
The Australian government has got the balance right between the need for press freedom and the need to enforce the law and protect national security	7%	52%	59%	30%	10%	40%	2%
Australia’s intelligence agencies have got the balance right between protecting national security and also being appropriately open and transparent with the Australian people about their activities	5%	54%	59%	31%	8%	39%	2%

TABLE 19

Values and economic interests

In foreign policy, there can sometimes be a clash between Australia's economic interests and Australia's democratic values. When that happens, should economic interests or democratic values be considered more important?

	2007 ^d	2020
Australia's democratic values are more important	74%	60%
Australia's economic interests are more important	18%	38%
Don't know/no view	8%	2%

^dIn 2007, the question asked was 'In dealing with international problems, there can sometimes be a clash between Australia's economic or political interests and Australia's democratic or humanitarian values. When that happens, should interests or values be considered more important?'

TABLE 20

Domestic interests and global cooperation

When trying to address global problems, there can sometimes be a clash between Australia's domestic interests and a global agreement being debated within an international institution. If that happens, what do you think the Australian government should do?

	2020
The Australian government should prioritise Australia's domestic interests over reaching a global agreement	66%
The Australian government should prioritise reaching a global agreement over Australia's domestic interests	31%
Don't know/no view	3%

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TABLE 21

Democracies around the world

Here is a list of countries and territories. For each one, please indicate whether you agree or disagree that the country or territory is a democracy.

	Agree	Disagree	Don't know/no view
United Kingdom	90%	8%	2%
United States	81%	17%	2%
Japan	79%	18%	3%
India	57%	40%	4%
Papua New Guinea	53%	42%	4%
Taiwan	52%	43%	4%
Indonesia	39%	58%	3%
Hong Kong	37%	60%	3%
China	10%	88%	2%

	Indonesia is a democracy ^e					
	2013	2015	2017	2018	2019	2020
Agree	33%	34%	27%	24%	34%	39%
Disagree	51%	54%	50%	50%	59%	58%
Don't know/no view	16%	12%	22%	26%	8%	3%

^e In 2013, 2015 and 2017, answers were given on a scale of strongly agree, somewhat agree, somewhat disagree, and strongly disagree. The responses above combine these responses as agree and disagree.

TABLE 22

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.^f

	2006	2007	2008	2009	2010	2011	2012	2013	2014	2015	2016	2017	2018	2019	2020
Canada	-	-	-	80%	82%	-	-	-	81%	-	84%	-	84%	-	79%
United Kingdom ^g	74%	75%	77%	-	-	79%	-	77%	-	79%	-	81%	82%	76%	74%
Japan	64%	63%	64%	66%	64%	67%	70%	65%	67%	68%	70%	71%	74%	72%	69%
Fiji	-	-	67%	63%	-	66%	68%	64%	68%	68%	-	-	-	68%	68%
United States	62%	60%	64%	67%	68%	70%	71%	70%	71%	73%	68%	69%	67%	63%	62%
United Nations	-	-	-	-	-	-	-	-	-	-	62%	-	-	-	61%
European Union	-	-	-	-	-	-	-	-	-	-	-	62%	67%	66%	60%
Hong Kong	-	-	-	-	-	-	-	-	-	-	-	-	-	63%	58%
Vietnam	-	60%	-	-	61%	-	-	61%	-	-	-	-	-	-	58%
Taiwan	-	-	-	-	-	58%	-	-	-	-	59%	-	60%	59%	57%
South Korea	56%	-	50%	53%	-	57%	61%	-	59%	-	-	60%	62%	-	57%
Papua New Guinea	63%	57%	60%	-	62%	-	64%	60%	59%	58%	63%	61%	63%	59%	56%
India	62%	55%	57%	56%	55%	56%	58%	55%	57%	56%	59%	60%	58%	53%	52%
Indonesia	50%	47%	50%	49%	54%	51%	54%	53%	52%	46%	54%	55%	54%	51%	51%
Israel	55%	50%	-	-	49%	-	-	53%	51%	-	-	53%	-	48%	47%
Russia	-	-	55%	-	55%	-	-	-	-	45%	52%	50%	47%	43%	42%
China	61%	56%	56%	53%	54%	53%	59%	54%	60%	58%	58%	59%	58%	49%	39%
Palestinian Territories	-	-	-	-	-	-	-	-	-	-	-	-	-	-	39%
Iran	43%	34%	38%	38%	38%	35%	38%	38%	39%	-	40%	-	-	-	33%
Saudi Arabia	-	-	-	-	-	-	-	-	-	-	-	-	40%	34%	32%

^f 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'.

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

COVIDPOLL: TABLES OF RESULTS

TABLE 1

Global responses to COVID-19

Overall, how well or badly do you think each of the following countries have handled the COVID-19 coronavirus outbreak so far?

	Very well	Fairly well	Total: well	Fairly badly	Very badly	Don't know/ no view
Australia	43%	50%	93%	6%	1%	0%
Singapore	23%	56%	79%	15%	3%	2%
China	6%	25%	31%	25%	44%	1%
United Kingdom	3%	27%	30%	49%	21%	1%
Italy	2%	13%	15%	44%	40%	1%
United States	2%	8%	10%	27%	63%	0%

TABLE 2

Global power in the post-crisis period

The world is currently going through a severe health and economic crisis. When the world recovers from this crisis do you think each of the following will be more powerful, less powerful or will they be just as powerful as they were before the crisis?

	2020			
	More powerful	Just as powerful	Less powerful	Don't know/no view
China	37%	36%	27%	0%
United States	6%	41%	53%	0%
Europe	5%	46%	48%	1%
	2009 ⁱ			
	More powerful	Just as powerful	Less powerful	Don't know/no view
China	72%	25%	3%	0%
United States	19%	48%	33%	0%

ⁱ In 2009, the question wording was “a severe economic crisis” rather than “a severe health and economic crisis”.

TABLE 3

China's system of government

Thinking about the way China has handled the COVID-19 coronavirus outbreak, are you more or less favourable towards China's system of government?

Less favourable	More favourable	About the same
68%	5%	27%

TABLE 4

US presidential election

The United States' presidential election will be held in November this year. Which candidate would you prefer to see become president of the United States?

	2008	2012	2016	2020
Joe Biden, if he is the Democratic candidate	73% Barack Obama	80% Barack Obama	77% Hillary Clinton	73%
Donald Trump, the Republican candidate	16% John McCain	9% Mitt Romney	11%	23%
Don't know/neither/either	11%	12%	13%	4%

TABLE 5

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	2020
Mostly good for Australia	64%	72%	79%	78%	72%	70%
Mostly bad for Australia	28%	23%	18%	15%	24%	29%
Neither/don't know/no view	8%	6%	4%	8%	4%	1%

TABLE 6

Global cooperation during crisis

How has the COVID-19 coronavirus outbreak changed your view, if at all, on global responses to international crises?

We need more global cooperation rather than every country putting their own interests first	53%
The balance between global cooperation and the interests of individual countries is about right	31%
We need less global cooperation. Every country should put their own interests first	16%
Don't know/no view	1%

TABLE 7

The response of authorities

Thinking now about the COVID-19 coronavirus outbreak. Are you confident or not confident that each of the following is doing a good job responding to the coronavirus outbreak?

	Very confident	Somewhat confident	Total: confident	Not too confident	Not at all confident	Total: not confident
Chief medical officers	49%	43%	92%	7%	2%	9%
Your state or territory government	42%	44%	86%	11%	3%	14%
Australia's federal government	36%	46%	82%	14%	4%	18%
World Health Organization	18%	41%	59%	26%	15%	41%

TABLE 8

Willingness to travel

Thinking about when the COVID-19 coronavirus outbreak is contained in the future, are you more or less likely to travel overseas than you were prior to the outbreak?

More likely	About the same	Less likely
6%	59%	35%

TABLE 9

Sources of information

During the COVID-19 coronavirus outbreak, which of the following do you prefer as your source of information? (select up to three choices)

The prime minister and government officials	59%
Government websites	50%
ABC (Australian Broadcasting Corporation)	50%
Newspapers and news websites	31%
Commercial, pay TV news and radio	28%
Social media	20%
Word of mouth	5%

ABOUT THE LOWY INSTITUTE POLL

Methodology

The 2020 Lowy Institute Poll reports the results of a national survey of 2448 Australian adults between 16 and 29 March 2020. 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 (93% of respondents) and computer-assisted telephone interviewing (7% of respondents) to provide coverage of the offline population (households without internet access). SRC boosted the sample for regional and rural populations of the Life in Australia™ panel. The order of questions in the questionnaire was different from the order presented in this report.

On a simple random sample of 2448 responses, the margin of error is 2.0%. 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 1.93. For the 2020 Lowy Institute Poll survey, a completion rate of 78.5% was achieved. Taking into account the recruitment rate to the panel and attrition from the panel, the cumulative response is 7.9%, which compares favourably with international

probability-based panels. Unlike other commercial online panels in Australia, the probability basis of the Life in Australia™ panel sampling method means results are generalisable to the national population and sampling errors and confidence intervals can be calculated.

COVIDpoll by the Lowy Institute Poll reports the results of a nationally representative online and telephone survey conducted by the Social Research Centre between 14 and 27 April 2020 with a sample size of 3036 Australian adults. The survey also used the SRC’s Life in Australia™ panel. A mixed-mode approach was also used for the panel, including online surveys (94% of respondents) and computer-assisted telephone interviewing (6% of respondents) to provide coverage of the offline population (households without internet access).

On a simple random sample of 3036 responses, the margin of error is approximately 1.8%. The design effect for this survey is estimated at 1.86. For the COVIDpoll survey, a completion rate of 76.9% was achieved.

In 2019, the Lowy Institute completed 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 2019, the Lowy Institute Poll was administered in the same way as in 2020: with 89% of respondents online and 11% offline.

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 Lowy Institute polls mirrors shifts in survey methods by highly respected polling organisations internationally. The Pew Research Center has moved the majority of its US polling online over the past five years,⁹ primarily through its American Trends Panel,¹⁰ another probability-based online panel. The Chicago Council on Global Affairs,¹¹ 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 2020 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 2020 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 dashed 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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