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PREFACE

COVID reveals. It sees through what nations say about themselves and reveals what they really are.

COVID has humbled great nations and raised up small nations. Like an X-ray, COVID shows up the healthy and unhealthy parts of the body politic.

It has shown the frailties of the United States — but also its resilience. It has shown both the capacities and weaknesses of China's authoritarian system.

Compared to most countries, Australia has fared very well over the past year. Our initial handling of the pandemic was among the best in the world. The Australian economy is humming along. However, in mid-2021, Australia — an open-minded nation of immigrants and travellers, with a long-held belief in globalisation — remains closed to the world.

The 2021 Lowy Institute Poll captures the mood of the Australian public at this remarkable moment. Australians have a renewed sense of optimism about the world and their place in it. The country is rightly proud of its efforts to manage the pandemic.

While Australians' trust in many countries has increased in 2021, sentiment towards China is now quite bleak. For the first time, more Australians see China's economic growth as a negative rather than a positive. The majority of Australians blame China for the current tensions in the bilateral relationship. More Australians see China as a security threat than an economic partner. Confidence in China's President Xi Jinping, already declining, has fallen to a new record low.

However, Australians do not want regional competition to slide into confrontation. Most still believe we can maintain good relations with both superpowers. A majority of Australians would prefer to stay neutral in the event of a military conflict between China and the United States.

Last November, Americans changed course and elected a new president, Joe Biden. Australians are much more confident in President Biden than they were in his predecessor. Trust in the United States has returned to an upward trajectory. Fewer Australians now believe that President Donald Trump weakened Australia's alliance with the United States, although this is still a majority view. Support for the Australia-US alliance remains strong.

Australia is also looking with renewed purpose to partners and friends in our region. In the year that Quad leaders first met as a foursome, Australians' trust in both Japan and India has increased. The majority of Australians, traditionally sceptical of foreign aid, want to help Pacific and Southeast Asian countries to access COVID vaccines.

As well as the annual Lowy Institute Poll, this report incorporates Climate Poll 2021, a survey that asked Australians about their views on climate change policy. Ahead of the UN Climate Change Conference in Glasgow in November, the vast majority of Australians want to see further action taken on climate change. They are also moving decisively away from coal. Most say Australia is doing too little to address climate change, but they are even more critical of perceived climate inaction by China, India and the United States.

In this its seventeenth year, the Lowy Institute Poll continues to chart how Australians feel about the world and its challenges, including COVID, China and climate change.

Dr Michael Fullilove
Executive Director
June 2021

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EXECUTIVE SUMMARY

Trust in global powers

Trust in China has fallen to a new record low, with only 16% of Australians saying that they trust China ‘a great deal’ or ‘somewhat’ to act responsibly in the world. This represents a 7-point decline from 2020 and is now a third of the level in 2018 when a majority of Australians (52%) said they trusted China. Almost all Australians (92%) trust Australia to act responsibly in the world. An overwhelming majority of Australians (87%) say they trust Japan and the United Kingdom to act responsibly in the world. Six in ten Australians (61%) say they trust the United States, an increase of 10 points from last year. The same number (61%) say they trust India a great deal or somewhat, an increase of 16 points since 2020. Almost half (48%) say they trust Indonesia, an increase of 12 points in the past year. Only 26% of Australians say they trust Russia, steady from 2020.

Confidence in world leaders

One in ten Australians (10%) say they have ‘some’ or ‘a lot’ of confidence in China’s President Xi Jinping to ‘do the right thing regarding world affairs’, which has halved since 2020 (22%) and fallen 33 points since 2018. US President Joe Biden inspires confidence in far more Australians than his predecessor. Seven in ten (69%) have confidence in President Biden, a striking 39 points higher than Australians’ confidence in former President Donald Trump in 2020 (30%).

New Zealand’s Prime Minister Jacinda Ardern tops the list of global leaders again, with 91% expressing confidence in her (up 4 points from 2020). Australians also hold high levels of confidence in German Chancellor Angela Merkel, with 67% saying they have confidence in her. Two-thirds (67%) express confidence in Prime Minister Scott Morrison, a 7-point increase from 2020. The number who are confident in Australia’s Opposition leader Anthony Albanese remains steady at 56%. More than half (59%) have confidence in UK Prime Minister Boris Johnson, 4 points higher than in 2020.

Six in ten Australians (61%) have confidence in Japan’s Prime Minister Yoshihide Suga. Fewer Australians have confidence in other leaders in our region, with 38% expressing confidence in Indian Prime Minister Narendra Modi and 26% saying they have confidence in Indonesian President Joko Widodo. Only 16% of Australians say they have confidence in Russian President Vladimir Putin. Almost no Australians (5%) say they have confidence in North Korea’s leader Kim Jong-un.

Australia’s alliance with the United States

A clear majority of Australians (78%, steady since 2020) continue to say that the alliance is either ‘very important’ or ‘fairly

important’ to Australia’s security. Three-quarters of Australians (76%) agree that ‘Australians and Americans share many common values and ideals. A strong alliance is a natural extension of this’. The same number (75%) say ‘the United States would come to Australia’s defence if Australia was under threat’. Fewer Australians this year (58%) agree that ‘Donald Trump has weakened Australia’s alliance with the United States’ (down 8 points since 2019). Only one-third (36%) say ‘the United States is in decline relative to China and so the alliance is of decreasing importance’, a view held by almost half the population (46%) in 2019.

When asked about a military conflict between China and the United States, more than half the population (57%) say ‘Australia should remain neutral’. Four in ten Australians (41%) say ‘Australia should support the United States’ and 1% say ‘Australia should support China’.

Seven in ten Australians (72%) say it is possible for Australia to have good relations with the United States and China at the same time, a 15-point drop since 2013.

China

The majority of Australians (63%) now see China as ‘more of a security threat to Australia’, a substantial 22-point increase from 2020. Only 34% say China is ‘more of an economic partner to Australia’, 21 points lower than in 2020. More than half (56%) say ‘China is more to blame’ than Australia for the tensions in the Australia-China relationship. Four in ten (38%) say that Australia and China are equally to blame. Almost none (4%) say ‘Australia is more to blame’. Australians are split over participation in the Winter Olympics in China: 51% favour attending, while 45% say Australia should not attend because of China’s human rights record.

Three-quarters of Australians (76%) say ‘Chinese people [they] have met’ have positively influenced their view of China (down 9 points since 2016). Seven in ten Australians (68%) say China’s culture and history have a positive influence on their view of China, an 11-point decline from 2016. Less than half the population (47%) say China’s economic growth has a positive influence on their view of China, a steep 28-point fall since 2016.

One in five Australians (20%) say that Chinese investment has a positive influence on their view of China, a 17-point decline from 2016. Only 17% of Australians say China’s environmental policies have a positive influence on their views of China, unchanged from 2016. A mere 6% say China’s system of government has a positive influence on their views of China, a 9-point decline from 2016. Almost no Australians (5%) see China’s military activities in our region as having a positive influence on their views of China.

Safety and threats to Australia’s interests

Australians’ feelings of safety appear to have rebounded from the record lows in 2020. Seven in ten Australians (70%) say they

feel 'very safe' or 'safe', an increase of 20 points. Six in ten Australians say that cyberattacks from other countries and climate change (62% and 61% respectively) pose critical threats to Australia's vital interests in the next ten years.

Fewer Australians (59%) see COVID-19 as a critical threat in 2021, down 17 points from last year. More than half the population (56%) see North Korea's nuclear program and Australia-China relations as critical threats. For the first time, the majority of Australians (52%) say a military conflict between the United States and China over Taiwan poses a critical threat to Australia's vital interests, an increase of 17 points from 2020. Half (51%) say international terrorism is a critical threat, up 5 points since 2020, but 17 points below the level of concern in 2017.

Five in ten Australians (50%) say a severe downturn in the global economy is a critical threat, a 21-point drop since 2020. Half (49%) say foreign interference in Australian politics poses a critical threat, a 7-point increase from 2020. A substantial minority say right-wing extremism (42%) and the influence of social media companies (39%) pose a critical threat to Australia's vital interests. A mere 9% say a lower rate of immigration into Australia poses a critical threat.

Economic optimism and foreign investment

In the largest rebound in economic optimism in the 17 years of the Lowy Institute Poll, 79% of Australians say they are 'optimistic' or 'very optimistic' about Australia's economic performance in the world. This represents a 27-point lift since 2020.

Most Australians would oppose a foreign government-controlled entity purchasing a controlling stake in a major Australian company. The highest level of opposition is to a Chinese-government controlled entity (92%) and a Hong Kong-government controlled entity (86%). The majority of Australians would also oppose such a purchase from an entity controlled by the Japanese government (68%), the government of a European Union member (67%), the United States government (66%) and the United Kingdom government (58%).

Australia's reputation in the world

Almost all Australians (97%) say Australia's response to COVID-19 will have a 'very positive' or 'positive' influence on Australia's reputation in the world. The majority of Australians also agree that Australia's diplomatic service (84%), foreign aid program (83%) and defence force (82%) have a positive influence on our reputation overseas. However, a majority of Australians (54%) say Australia's climate change policy has a negative influence on Australia's reputation overseas.

Coalition government report card

The Australian public awards high marks to the Coalition government for its response to COVID-19 (7.6 out of 10) and for maintaining 'Australia's national security' and 'a strong alliance with the United States' (both 6.8 out of 10). The government

receives 6.6 out of 10 for managing the economy, and 6.5 out of 10 for presenting a good image of Australia internationally. Australians are more divided on China, awarding 5.1 marks out of 10 for the government's management of the bilateral relationship. The only area where the government receives a below-average mark is for Australia's approach to climate change (4.6 out of 10).

Feelings thermometer

China has fallen to the bottom of the Lowy Institute 'feelings thermometer' at a very cool 32°, a 7-degree drop this year, and a striking 26-degree cooling since 2018. Australian feelings towards Myanmar have cooled to 41°. Both India (56°) and Indonesia (55°) have improved by 4 degrees since 2020. Feelings towards Hong Kong have remained stable in 2020 at 57°. Views of Papua New Guinea have warmed in 2021 to 60°, a 4-degree lift since 2020. Australians rated the Pacific Islands Forum a warm 66°. Warmth towards Taiwan has increased by 5 degrees to 62° since 2020. Feelings towards the United States sit at a steady 62°, unchanged from 2020. Feelings towards Japan have warmed in 2021, increasing 4 degrees to 73° in line with a warming trend (up 10 degrees since 2007). New Zealand again leads the Lowy Institute 'feelings thermometer' in 2021, receiving a very warm 87°.

The COVID-19 pandemic

Almost all Australians (95%) say Australia has handled the pandemic 'very well' or 'fairly well'. Two-thirds (66%) say Taiwan has handled COVID-19 well. Less than half (45%) say China has handled COVID-19 well, a 14-point increase from 2020. Few Australians say that India (27%), the United Kingdom (19%) and the United States (7%) have handled COVID-19 well. Six in ten Australians (59%) say the government has done 'about the right amount to bring Australians home from overseas'. Most support Australia helping to pay for COVID-19 vaccines for Pacific Island countries (83%) and Southeast Asian countries (60%).

Climate change and energy

Six in ten (60%) say 'global warming is a serious and pressing problem. We should begin taking steps now, even if this involves significant costs', a 4-point increase from 2020. Three-quarters (74%) say 'the benefits of taking further action on climate change will outweigh the costs'. The majority of Australians support subsidising renewable energy technology (91%), setting a net-zero emissions target for 2050 (78%) and introducing an emissions trading scheme or carbon tax (64%). Ahead of COP26, seven in ten (70%) agree Australia should 'join other countries, such as the United Kingdom and the United States, to increase its commitments to address climate change'.

The Lowy Institute Poll reports the results of a nationally representative online and telephone survey conducted by the Social Research Centre (SRC) between 15 and 29 March 2021, with a sample size of 2222 Australian adults. Climate Poll 2021 reports the results of a representative survey conducted by SRC between 12 and 26 April 2021, with a sample size of 3286 Australian adults. See Methodology, p.45.

GLOBAL POWERS AND WORLD LEADERS

Trust in global powers

As various countries around the world have coped with the pandemic in different ways, Australians appear confident in their own country as one of the safest, most prosperous and trustworthy. For the first time, the Lowy Institute asked Australians in 2021 about their level of trust in Australia to act responsibly in the world. Australians give their country top marks, with almost all (92%) Australians saying they trust Australia 'a great deal' or 'some-what' to act responsibly in the world.

Despite large disparities in response to the pandemic abroad, the majority of Australian adults trust Japan, the United Kingdom, the United States and India. Conversely, Australians' trust in China has continued its steep decline in 2021.

Australians reserve their highest levels of trust for other liberal democracies across the world. An overwhelming majority of Australians say they trust Japan (87%, up 5 points) and the United Kingdom (also 87%) to act responsibly in the world.

Trust in the United States has rebounded in 2021, but there remains a gulf between Australian views of the United Kingdom and Japan, and trust in the United States. Six in ten Australians (61%) say they trust the United States, an increase of 10 points from last year. However, this level of trust remains 22 points lower than the high point for trust in the United States that was recorded during President Barack Obama's administration.

FIGURE 1

Trust in global powers

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

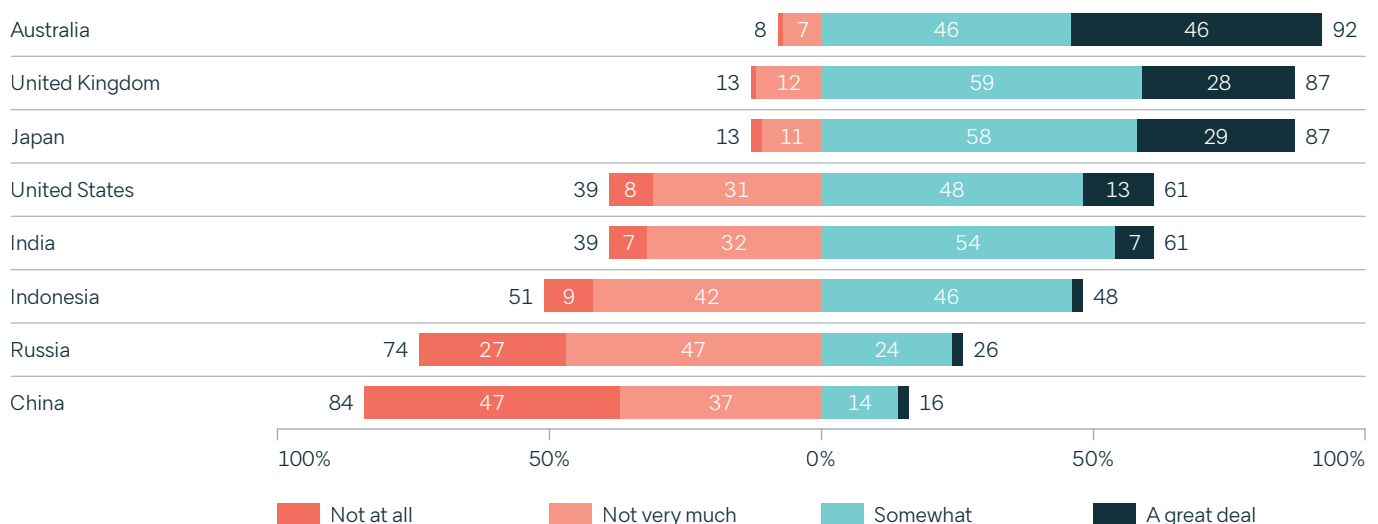
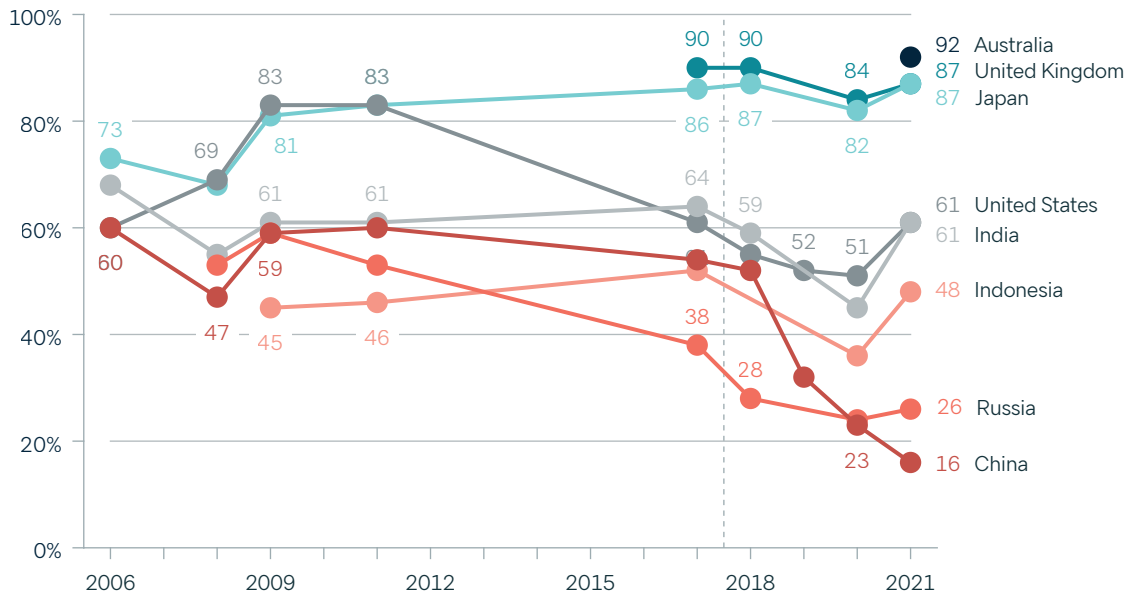


FIGURE 2**Trust in global powers – historical**

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. 45.

There remains a significant generational divide between Australians on the issue of trust in the United States. Only 40% of Australians aged 18–29 trust the United States, compared with 66% of Australians aged over 30.

Most Australians trust the liberal democracies of Japan and the United Kingdom

In a remarkable shift since 2020, Australians' trust in India is on par with trust in the United States. Six in ten Australians (61%) say they trust India a great deal or somewhat, an increase of 16 points since 2020. The fieldwork for the Lowy Institute Poll (15–29 March 2021) took place prior to the resurgence of COVID-19 in India in April 2021.

Past polling has shown that Australians tend to be divided when it comes to our largest neighbour, Indonesia. In 2021, there has been a notable lift in trust, with almost half (48%) say they trust Indonesia, an increase of 12 points in the past year. Only 26% of Australians say they trust Russia, steady from 2020.

For the second year in a row, China is the least-trusted country on the list for Australians. Only 16% of Australians say that they trust China a great deal or somewhat to act responsibly in the world, a 7-point decline from 2020. The number of Australians holding positive views of China's trustworthiness has plummeted in three years, halving since 2019 and now at a third of the level in 2018 when a majority of Australians (52%) said they trusted China.

Confidence in world leaders

The continuing decline in Australians' trust of China corresponds with record low levels of confidence in China's President Xi Jinping. Only 10% of Australians say they have 'some' or 'a lot' of confidence in President Xi to 'do the right thing regarding world affairs'. This is less than half the confidence that Australians expressed in President Xi in 2020 (22%) and has fallen 33 points since 2018.

In 2020, then-President Donald Trump inspired confidence in only slightly more Australians than President Xi (30% confident in Trump vs 22% in Xi). However, US President Joe Biden receives far higher marks from the Australian public. Seven in ten Australians (69%) express confidence in him to do the right thing regarding world affairs. This is a striking 39 points higher than Australians' confidence in former President Trump in 2020.

New Zealand's Prime Minister Jacinda Ardern tops the list of global leaders again, with 91% expressing con-

fidence in her (up 4 points from 2020). This aligns with New Zealand's retention of its traditional place at the top of the annual 'feelings thermometer', ranking again as the country about which Australians feel most warmly (see p. 23). Australians also hold high levels of confidence in German Chancellor Angela Merkel, with 67% saying they have some or a lot of confidence in her.

The majority of Australians are confident that both Prime Minister Scott Morrison and Opposition leader Anthony Albanese will do the right thing regarding world affairs, although Albanese falls 11 points behind Morrison on this measure. Seven in ten Australians (67%) express confidence in Morrison, a 7-point increase from 2020. The number who are confident in Albanese is steady this year at 56%.

Unsurprisingly, there are significant partisan divides on this question, although a majority of both Coalition-leaning and Labor-leaning Australians of

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.

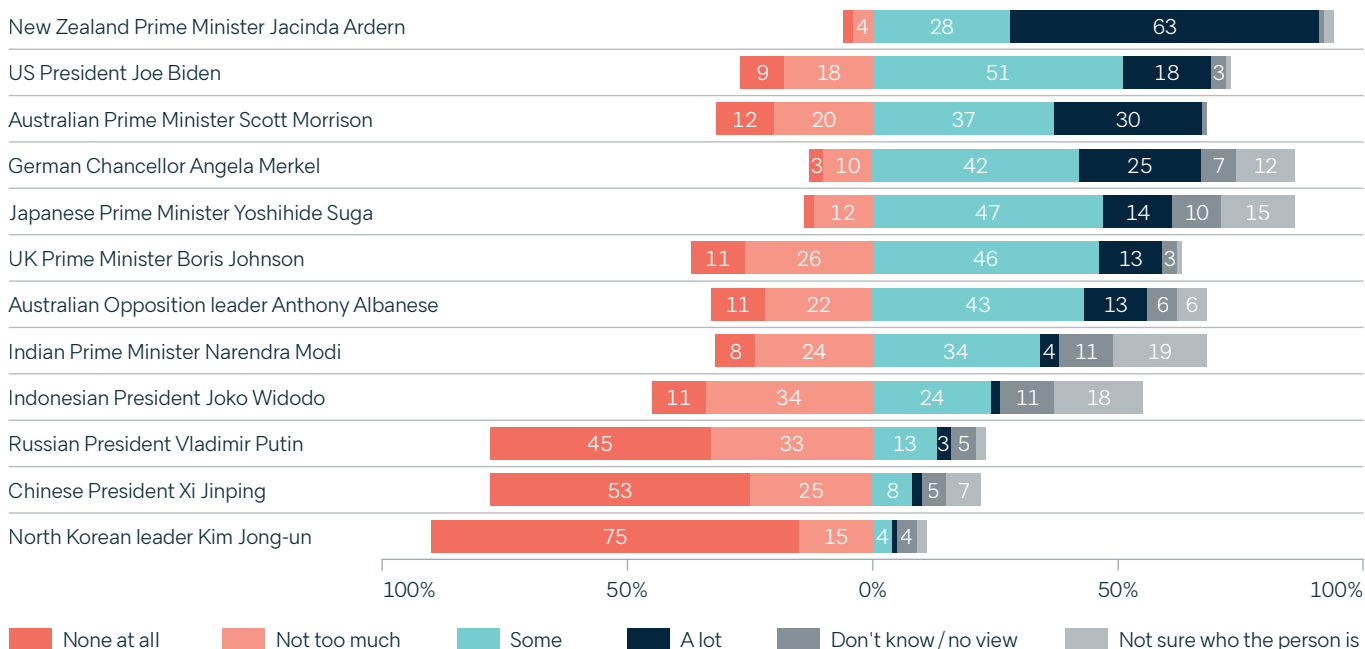
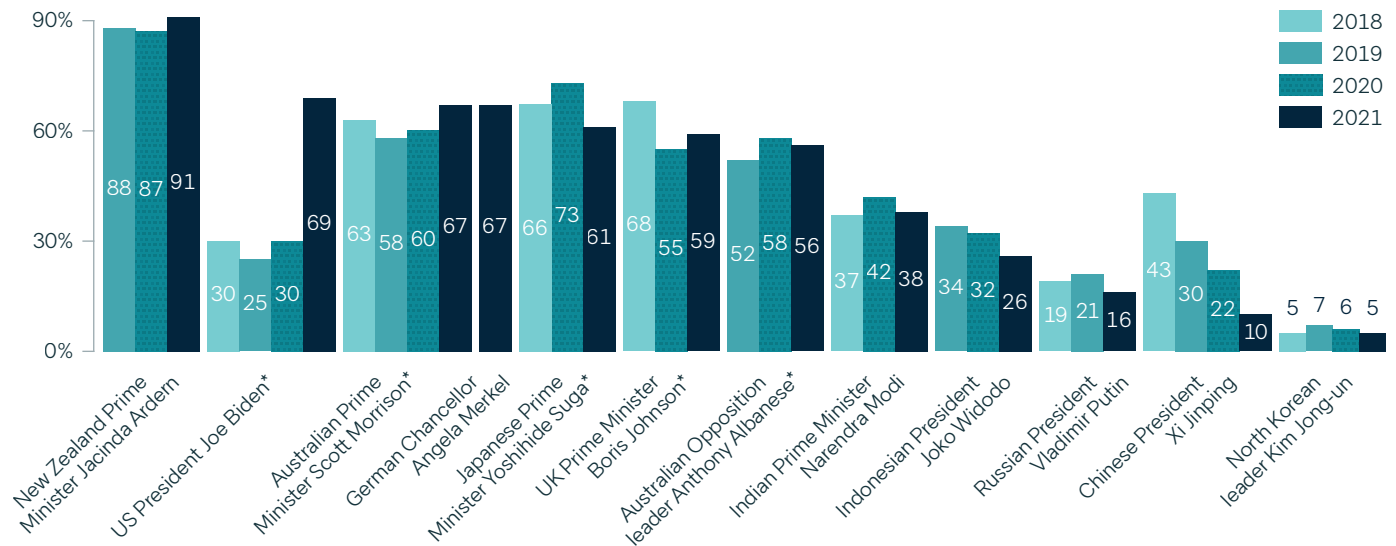


FIGURE 4

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.



*This question has always been asked about the current leader at the time of Poll fieldwork, i.e. former US President Donald Trump (2018–2020), former Australian Prime Minister Malcolm Turnbull (2018), former Japanese Prime Minister Shinzo Abe (2018–2020), former UK Prime Minister Theresa May (2018) and former Australian Opposition leader Bill Shorten (2019).

voting age are confident in Morrison (95% Coalition and 56% Labor). In contrast, 74% of Labor-leaning Australians have confidence in Albanese, compared to 44% of Coalition-leaning Australians.

Australians' lack of familiarity with regional leaders has been a persistent feature in Lowy Institute polling over the years. A significant proportion of Australians have responded in 2021 that they 'do not know who the person is' for several key leaders in our region. Close to one in five Australians say they do not know of Japanese Prime Minister Yoshihide Suga, Indian Prime Minister Narendra Modi and Indonesian President Joko Widodo.

Six in ten Australians (61%) have confidence in Japanese Prime Minister Yoshihide Suga, 12 points lower than for his predecessor Prime Minister Shinzo Abe in 2020, possibly reflecting the recency of Suga's tenure and Australians' unfamiliarity with him as Japan's leader. (Prime Minister Suga was elected in September 2020, and 15% of Australians say they

do not know of him.) More than half (59%) say they have confidence in UK Prime Minister Boris Johnson, 4 points higher than in 2020.

Although trust in India increased significantly in 2021, only four in ten Australians (38%) express confidence in Indian Prime Minister Narendra Modi to do the right thing regarding world affairs. Similarly, although Australians' trust in Indonesia has improved in the past year, only a quarter of Australians (26%) say they have confidence in Indonesian President Joko Widodo.

Russian President Vladimir Putin and North Korean leader Kim Jong-un continue to elicit very negative opinion among Australians. Only 16% of Australians say they have a lot or some confidence in President Putin. Almost no Australians (5%) say they have confidence in North Korea's leader Kim Jong-un. Kim Jong-un is the only world leader on the list in 2021 who receives fewer votes of confidence than China's President Xi Jinping.

RELATIONS WITH SUPERPOWERS – THE UNITED STATES AND CHINA

Australia's alliance with the United States

Australians have reported strong support for Australia's alliance with the United States over the 17 years of the Lowy Institute Poll, despite fluctuating levels of confidence in US leaders. Overall support for the alliance has remained steady between the final year of President Donald Trump's administration and the first year of President Joe Biden's administration. A clear majority (78%, steady since 2020) continue to say that the alliance is either 'very important' or 'fairly important' to Australia's security. The number who say the alliance is very important to Australia's security has increased 4 points this year to 47% of the population.

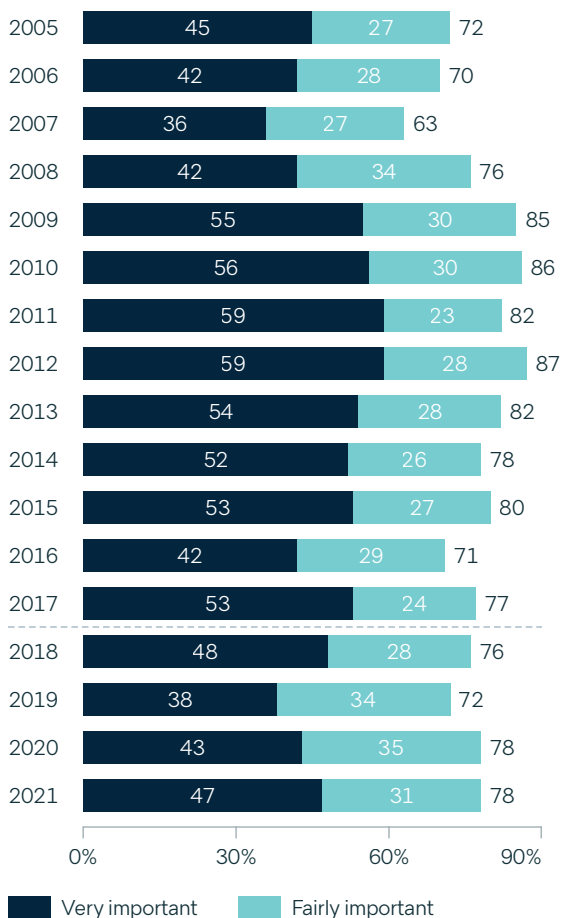
By comparison, the low point of Australian support for the alliance was during of the George W Bush presidency in 2007, when 63% of Australians said the alliance was very or fairly important for Australia's security. The 2021 result remains 9 points below the highest levels of support expressed in 2012, during former President Barack Obama's administration.

This slight boost in support for the alliance in 2021 may in part reflect the far higher confidence Australians express in President Joe Biden than former President Donald Trump (see p. 8). More than three-quarters of Australians (76%, a slight increase of 3 points since 2019) say 'Australians and Americans share many common values and ideals. A strong alliance is a natural extension of this'. The same number (75%) say 'The United States would come to Australia's defence if Australia was under threat', unchanged since 2019.

FIGURE 5

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?



Dashed line indicates change in mode: see Methodology, p. 45.

Fewer Australians this year (58%) agree that 'Donald Trump has weakened Australia's alliance with the United States' (down 8 points since 2019). Fewer Australians also perceive the United States as a declining power compared with China than in the past. In 2021, only one-third (36%) say 'the United States is in decline relative to China and so the alliance is of decreasing importance', a view held by almost half the population (46%) in 2019.

However, there are stark generational differences on all of these questions about Australia's alliance with the United States. Seven in ten Australians aged 18–29 (70%) say Donald Trump weakened the

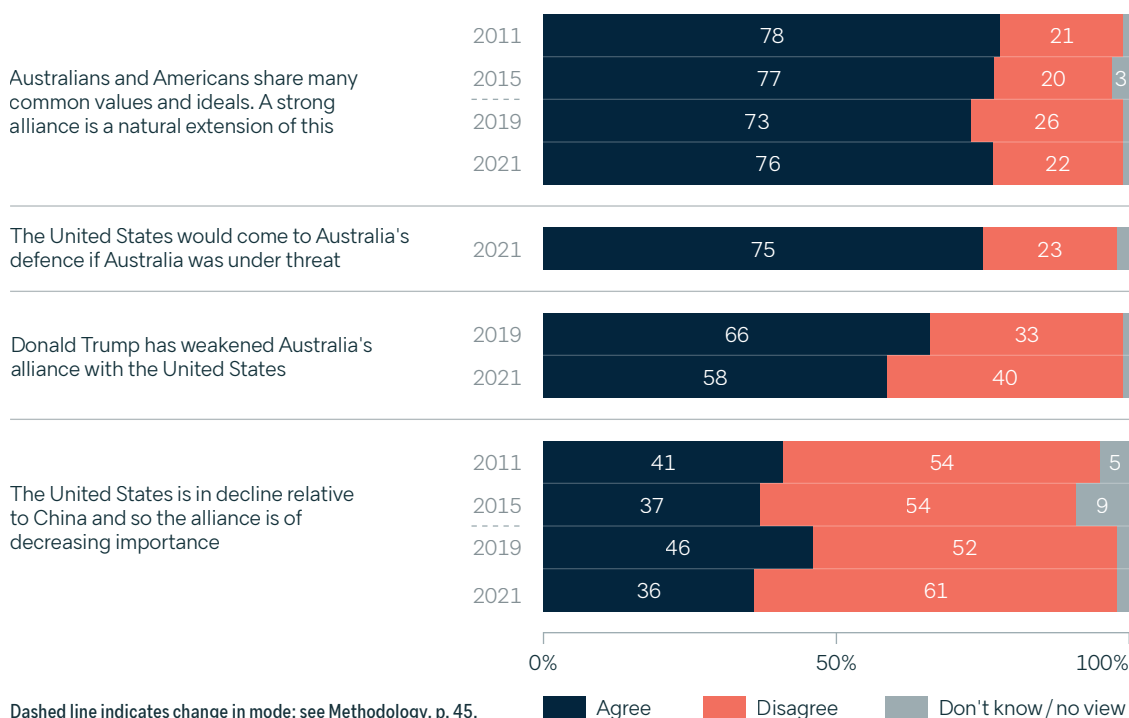
alliance. Half this group (50%) say the United States is in decline relative to China and the alliance is less important, 19 points higher than among Australians over 60 years of age.

By contrast, the oldest generation of Australians surveyed (60 years and over) overwhelmingly agree that Australia and the United States share common values and ideals (89%) and that the United States would defend Australia if under threat (84%). The youngest generation of Australians (18–29 year olds) are less likely to concur on both statements, with 61% and 62% agreeing respectively.

FIGURE 6

Attitudes to the United States

I am now going to read you some different arguments about the alliance relationship with the United States. Please indicate whether you agree or disagree.



Views of China

The sharp decline in the Australia–China relationship in recent years has been clearly mirrored in Australian public opinion, as seen in successive Lowy Institute Polls. Trust, warmth and confidence in China and China's leaders started to decline in 2017, and this year's results present another record low for Australians' views of China. In 2021, even views of China's economic growth — historically a positive for Australians — have now shifted into negative territory.

For the first time, Australians see China's economic growth as having a negative influence

The year of economic and political disputes between Australia and China has left its mark. In a conspicuous shift, the majority of Australians (63%)

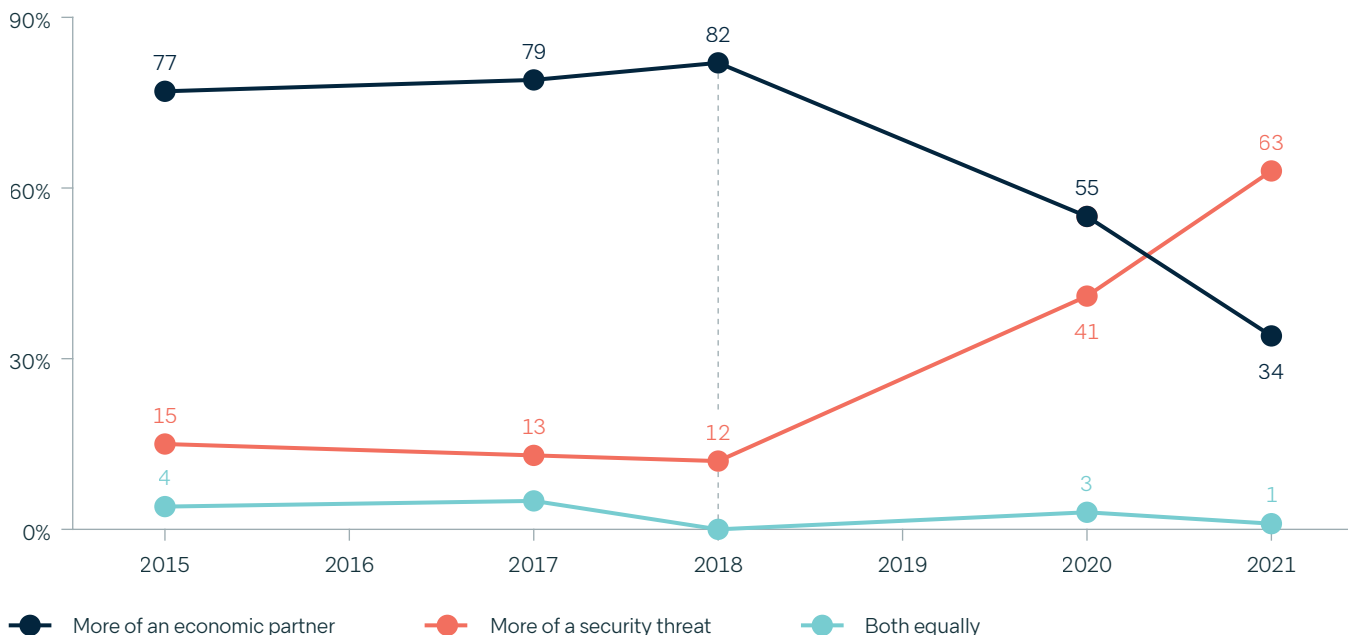
now see China as 'more of a security threat to Australia'. This is a substantial 22-point increase from 2020. Only 34% say China is 'more of an economic partner to Australia', 21 points lower than in 2020. In 2018, 82% of Australians saw China as more of an economic partner, responding to a question worded slightly differently.¹

Almost all Australians (93%) see China's military activities in our region as having a negative influence on their views of China, a 14-point increase from 2016. Only 5% say China's military activities have a positive influence. This concern about military activities may have contributed to the large increase in the number of Australians who view 'a military conflict between the United States and China over Taiwan' as a critical threat to Australia's vital interests over the next ten years (52%, up 17 points: see p. 17).

FIGURE 7

China: economic partner or security threat

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



From 2015–18, the question was phrased: 'is China more of an economic partner or more of a military threat?' Dashed line indicates change in mode: see Methodology, p. 45.

When asked to assign responsibility for the tensions in the Australia–China relationship, the majority of Australians (56%) say ‘China is more to blame’ than Australia. One-third (38%) say that Australia and China are equally to blame. Almost none (4%) say ‘Australia is more to blame’, despite holding reservations about the government’s handling of the relationship (see p. 22). The majority of Australians (56%) see ‘Australia–China relations’ as a critical threat to Australia’s vital interests (see p. 17). And in further evidence of souring attitudes, eight in ten Australians (82%) responding to a separate Lowy Institute survey in November 2020 said that they were concerned about China’s influence on Australia’s political processes, a 19-point increase from 2018 (see p. 18).

Views of China’s system of government have also deteriorated further: in 2021, 92% say ‘China’s system of government’ has a negative influence

on their views of China, a 19-point increase from 2016. China’s early handling of the COVID-19 outbreak may have been a factor, with 68% of Australians saying in April 2020 that China’s handling of the COVID-19 outbreak had made them feel ‘less favourable’ towards China’s system of government.²

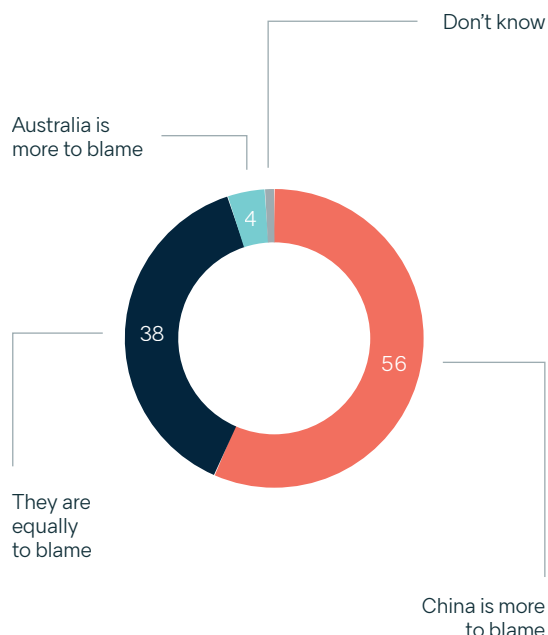
Even in relation to China’s strong economic growth story, Australian attitudes have shifted significantly in recent years. In 2021, less than half the population (47%) say China’s economic growth has a positive influence on their view of China, a steep 28-point fall since 2016.

These striking shifts in public sentiment on China are sometimes ascribed to negative reporting by the Australian media. According to a November 2020 survey, many Australians (61%) say Australian media reporting about China is ‘fair and balanced’. A quarter (26%) say that reporting is ‘too negative’, while 10% say it is ‘too positive’ (see p. 15).

FIGURE 8

Tensions in the Australia-China relationship

Which country is more to blame for the tensions in the Australia-China relationship?



While Australian views of China have cooled overall in recent years, most Australians remain positive about Chinese people and China’s culture and history. Three-quarters of Australians (76%) say ‘Chinese people [they] have met’ have positively influenced their view of China (down 9 points since 2016: see Methodology on p. 45 for details of changes in mode).

Seven in ten Australians (68%) say China’s culture and history have a positive influence on their view of China, an 11-point decline from 2016.

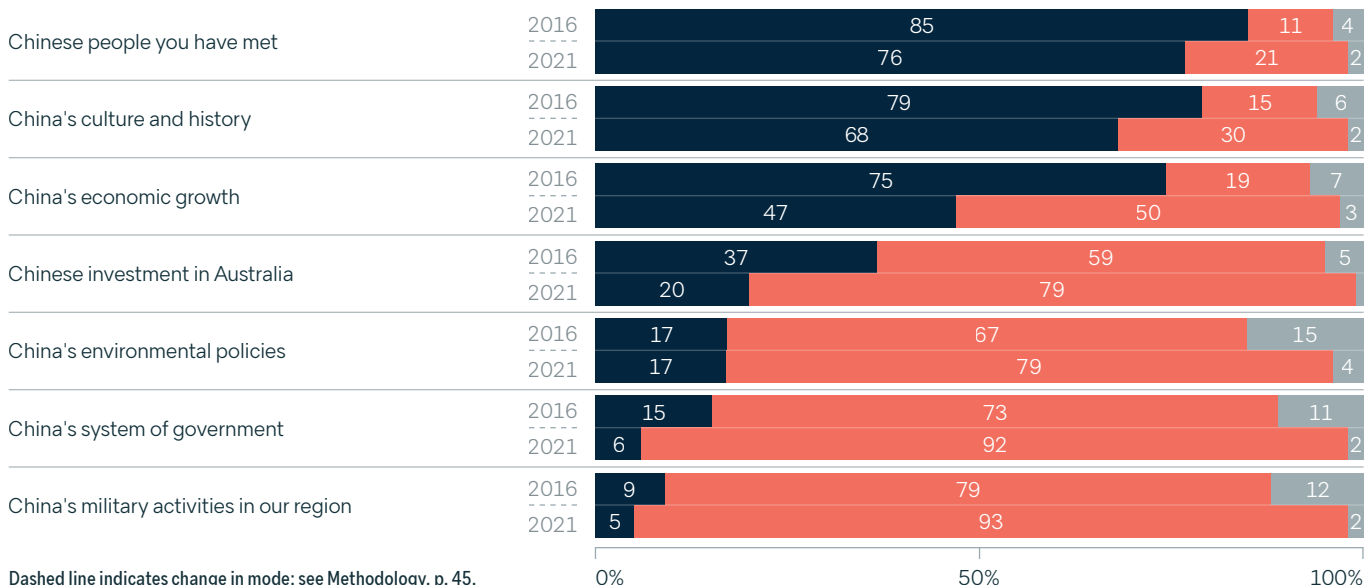
Chinese investment in Australia has been unpopular for some time, but attitudes have hardened further in the past five years. In 2021, only one in five Australians (20%) say that Chinese investment has a positive influence on their view of China, a 17-point decline from 2016. While the majority of Australians oppose any entity controlled by a foreign government having a controlling stake in an Australian company, this is particularly clear in relation to the Chinese government (92% opposed) and the Hong Kong government (86% opposed) (see p. 18).

FIGURE 9

Views of China

For each of the following factors, please say whether, for you personally, they have a positive or negative influence on your overall view of China.

Positive ■
Negative ■
Don't know / no view ■



Australians remain unimpressed by China's environmental policies, despite its recent commitment to net-zero emissions by 2060.³ Only 17% of Australians say China's environmental policies have a positive influence on their views of China, unchanged from 2016. Eight in ten Australians (82%) say China is doing 'too little' in its efforts to combat climate change (see p. 29).

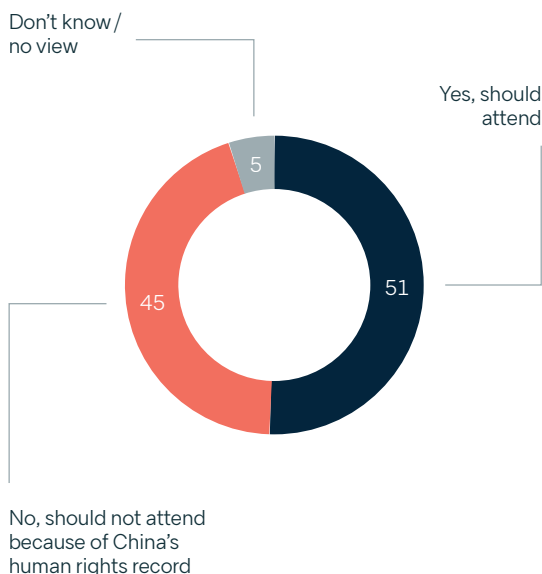
Australians are divided as to whether to boycott the Beijing Olympics

The vast majority of Australians have also expressed concerns about China's human rights record over the history of the Lowy Institute Poll. As debate about China's hosting of the Winter Olympics in 2022 escalates, a bare majority (51%) say Australia should attend the Beijing Olympics. Less than half (45%) say Australia 'should not attend because of China's human rights record'.

FIGURE 10

Attending the Winter Olympics in China

Should Australia attend the Winter Olympics, or not attend because of China's human rights record?



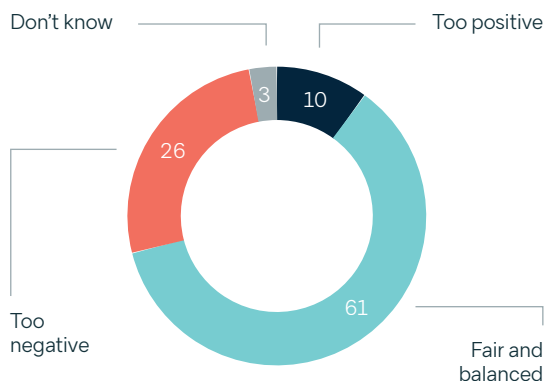
Australia's relationship with the superpowers

Past Lowy Institute polling shows Australians have become increasingly wary of military engagement in some parts of the world, and support for deploying military forces has been consistently low for hypothetical scenarios involving China.⁴ When asked about a military conflict between China and the United States, more than half the population (57%) say 'Australia should remain neutral'. Four in ten Australians (41%) say 'Australia should support the United States' and 1% say 'Australia should support China'. There is a stark divide between the youngest and oldest Australians on this question: only one in five (21%) Australians aged 18–29 say Australia should support the United States in the case of conflict, a view held by the majority (58%) of Australians aged over 60.

As well as a preference to remain neutral in the case of a conflict in the region, seven in ten Australians (72%) say it is possible for Australia to have good relations with the United States and China at the same time. This is a smaller number than in 2013 however, when 87% of the population thought Australia could maintain good relations with both powers at the same time.

FIGURE 11
Australian media reporting about China

Overall, would you say Australian media reporting about China is:



This question was fielded in a separate Lowy Institute nationwide poll in November 2020: see Methodology, p.45.

FIGURE 12
Military conflict between China and the United States

In the event of a military conflict between China and the United States, please say which one of the following statements comes closest to your own personal view.

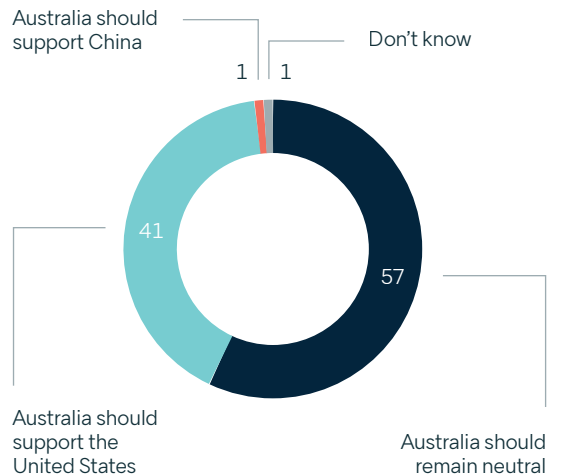
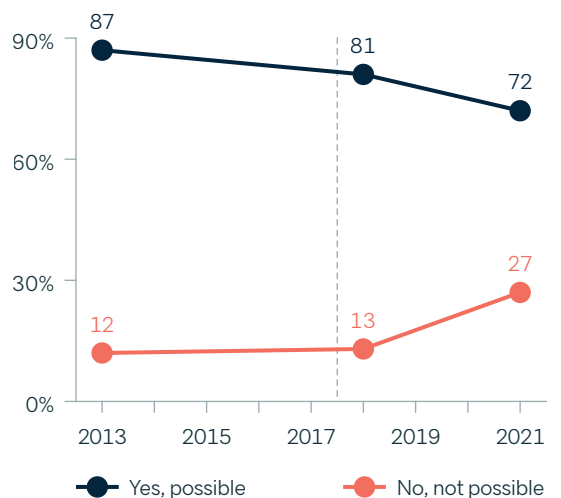


FIGURE 13
Good relations with the United States and China

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



Dashed line indicates change in mode: see Methodology, p. 45.

SAFETY, SECURITY AND THREATS TO AUSTRALIA'S VITAL INTERESTS

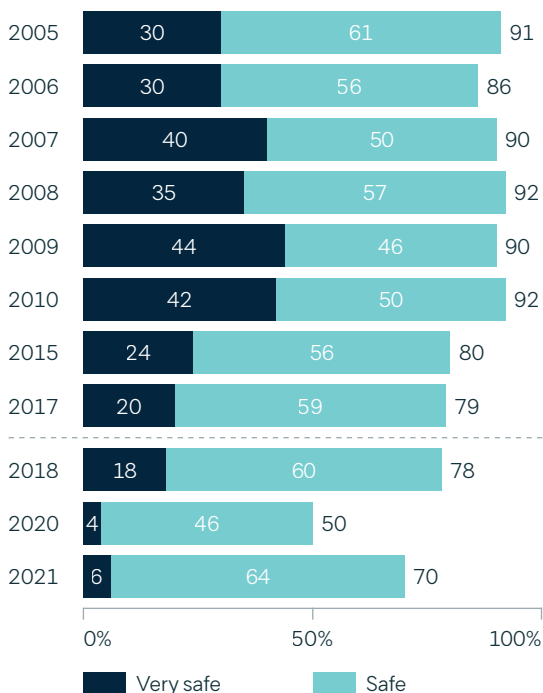
Feelings of safety

After a year in which the bushfire crisis and the COVID-19 outbreak took a heavy toll on Australians' sense of security, their feelings of safety appear to have rebounded this year from the record lows of 2020. In 2021, seven in ten Australians (70%) say they feel 'very safe' or 'safe'. This represents an increase of 20 points since last year, but is still short of pre-pandemic levels. This year's result is 22 points below the high point of feelings of safety in 2008 and 2010.

FIGURE 14

Feelings of safety

Now about world events, how safe do you feel?



Dashed line indicates change in mode: see Methodology, p. 45.

Threats to Australia's vital interests

Concerns about non-traditional security threats continue to dominate Australians' views of potential threats in 2021. Cyberattacks and climate change top the list of threats, with COVID-19 close behind. Six in ten Australians say that cyberattacks from other countries and climate change (62% and 61% respectively) pose critical threats to Australia's vital interests in the next ten years.

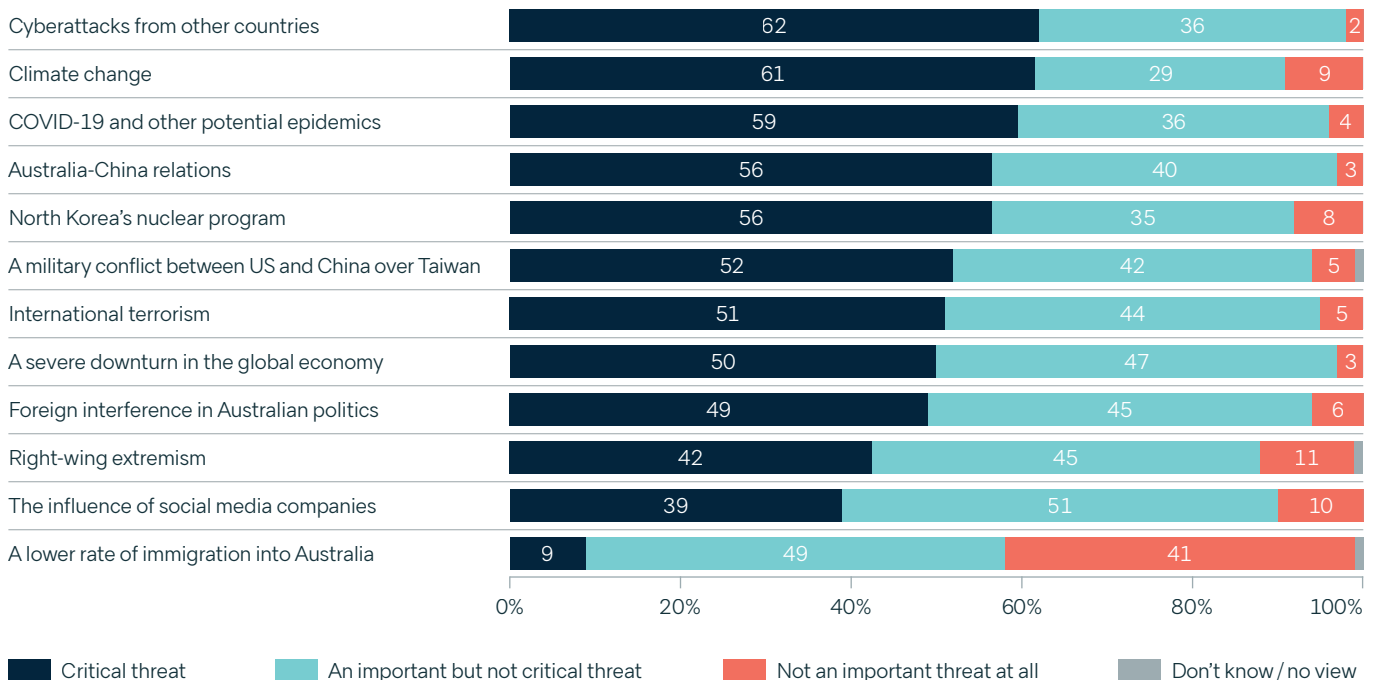
Fewer Australians (59%) see COVID-19 as a critical threat in 2021, down 17 points from last year. This lower threat ranking may reflect Australia's management of the pandemic, which almost all Australians (95%) say has been handled very or fairly well (see p. 25).

Traditional security threats, such as the risk of armed conflict in the region, remain of concern to many Australians. Perhaps responding to recent media reporting of increased military activities in the Taiwan Strait, a majority of Australians (52%) say a military conflict between the United States and China over Taiwan poses a critical threat to Australia's vital interests, an increase of 17 points from 2020. Just over half the population (56%) also say that Australia–China relations pose a critical threat to Australia's vital interests in the next ten years.

Australians' concerns about nuclear threats and terrorism have eased in recent years, though still remain a critical threat for the majority. More than half the population (56%) see North Korea's nuclear program as a critical threat, but this has fallen 9 points since 2017. Similarly, 51% of Australians say international terrorism is a critical threat, up 5 points since 2020, but 22 points below the high point of concern in 2006.

FIGURE 15**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.



As Australia begins its recovery from the pandemic-induced recession, optimism about the economy has rebounded (see p. 19), and concern about a severe downturn in the global economy has fallen back to 2019 levels. Five in ten Australians (50%) say a severe downturn in the global economy is a critical threat, a 21-point drop since 2020.

Other non-traditional threats elicit lower levels of concern. Views on foreign interference in Australian politics have seesawed since the issue came to prominence in 2017. Concern is on the rise again in 2021, with 49% saying foreign interference in Australian politics poses a critical threat, a 7-point increase from 2020.

ASIO has reported an increase in right-wing extremism activities in Australia in recent years. A minority of Australians (42%) say right-wing extremism is a critical threat to Australia's vital interests.

The debate over the role of social media companies has been widespread in the past year, including when Facebook shut down its newsfeed in Australia. Four in ten Australians (39%) say the influence of social media companies poses a critical threat to Australia's vital interests.

In 2020, Australia's population shrank for the first time in 100 years, driven by a decline in overseas arrivals due to COVID-19 border closures. But only a fraction of Australians (9%) say a lower rate of immigration into Australia is a critical threat to the country's vital interests. This finding adds to the complexity of views Australians have expressed about immigration in past Lowy Institute polls. In 2019, for example, 67% said that immigration has a positive impact on Australia's economy. At the same time, half the population (47%) said that the total number of migrants coming to Australia each year was 'too high'.⁵

Foreign influence

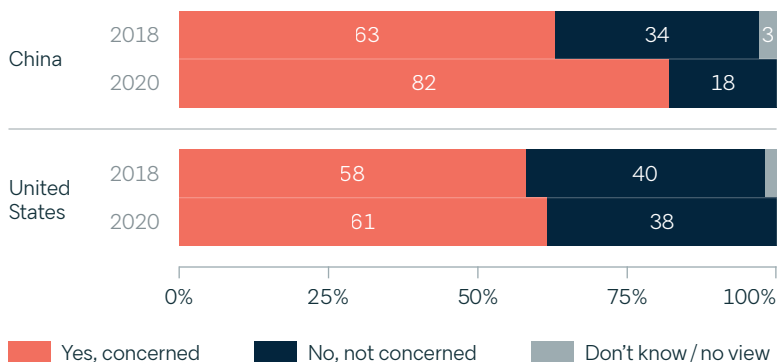
Underlining the finding that more Australians perceive foreign interference as a critical threat to the nation's vital interests, there has been a significant jump in the number of Australians concerned about influence from China. In a November 2020 survey, eight in ten Australians (82%) said they were concerned about China's influence on Australia's political processes, a 19-point increase from 2018. The majority of Australians (61%) also expressed concern about the United States' influence on Australia's political processes, steady from 2018.

Eight in ten are concerned about China's influence on Australia's political processes

FIGURE 16

Foreign influence in Australian politics

Are you personally concerned or not concerned about the influence of each of the following countries on Australia's political processes?

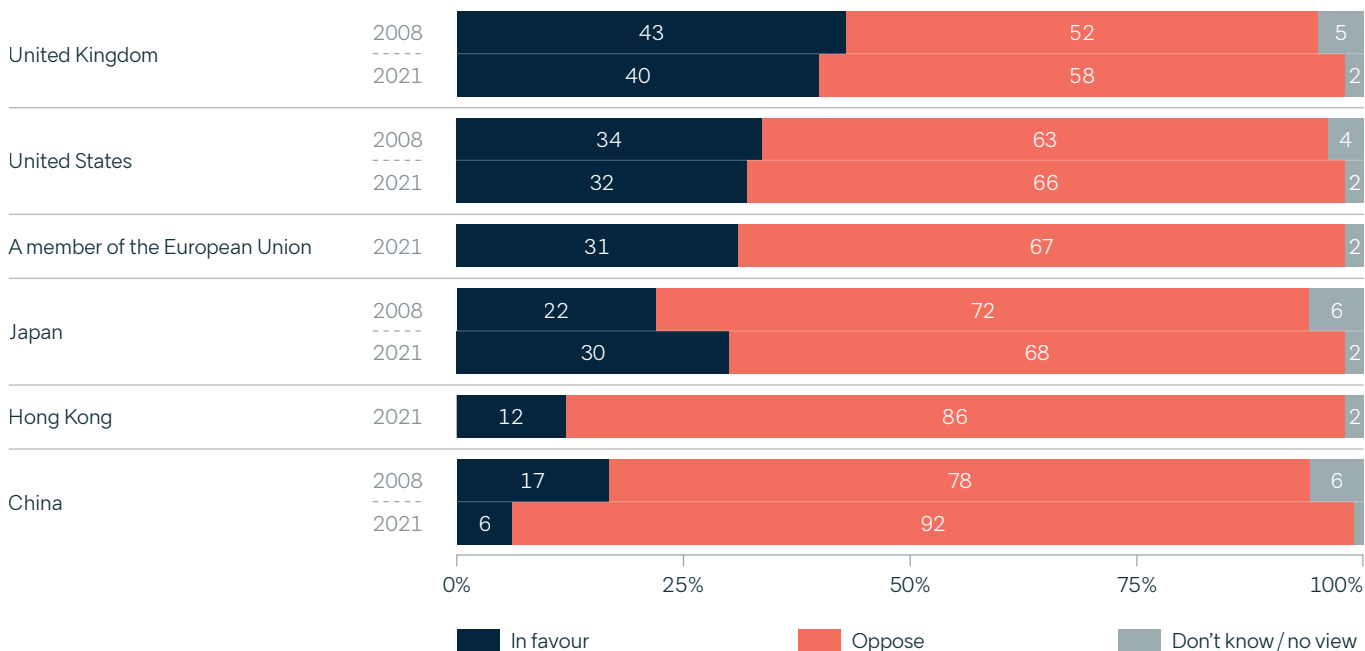


This question was fielded in a separate Lowy Institute nationwide poll in November 2020, see Methodology: p.45.

FIGURE 17

Foreign investment by country

Are you in favour or opposed to a company, bank or investment fund controlled by the following foreign governments buying a controlling stake in a major Australian company?



The question in 2008 was 'If a company, bank or investment fund controlled by a foreign government was trying to buy a controlling stake in a major Australian company, please say whether you would be strongly in favour, in favour, opposed, strongly opposed.' Response options were 'strongly in favour', 'in favour', 'opposed' and 'strongly opposed'. Dashed line indicates change in mode. See Methodology, p. 45.

ECONOMIC OUTLOOK AND FOREIGN INVESTMENT

Optimism about Australia's economic performance

Australians appear to have largely recovered from their concerns in 2020 about the global economic downturn. In the largest rebound in economic optimism in the 17 years of the Lowy Institute Poll, 79% of Australians say they are 'optimistic' or 'very optimistic' about Australia's economic performance in the world. This represents a 27-point lift since 2020, and optimism about the economy is now higher than before the pandemic, although slightly lower than the levels after the global financial crisis, when 86% of the population expressed similar levels of optimism. This positive response to the pandemic-induced economic crisis is similar to that following the 2008–9 financial crisis, and is accompanied by a sharp drop in concern about a severe downturn in the global economy (see p. 17).

Investment from foreign countries

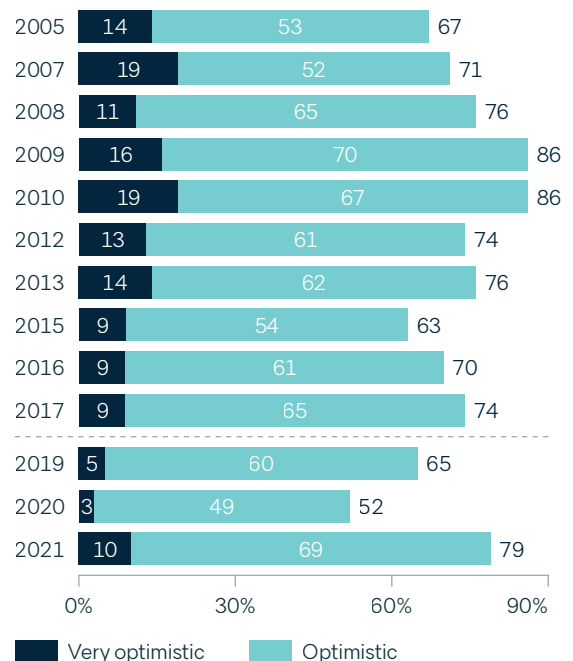
Australians' longstanding scepticism about foreign investment persists in 2021. Revisiting a question asked in the 2008 Poll about whether companies with links to foreign governments should be permitted to invest in Australian companies, the vast majority of Australians oppose foreign government-controlled entities purchasing controlling stakes in Australian companies. However, some countries elicit stronger opposition than others.

Nine in ten Australians (92%) would oppose a Chinese-government controlled entity purchasing a controlling stake in an Australian company. Hong Kong is the fifth-largest source of foreign investment in Australia. However, 86% say they would oppose a Hong Kong-government controlled entity purchasing a controlling stake in an Australian company.

FIGURE 18

Optimism about Australia's economic performance

Overall, how optimistic are you about Australia's economic performance in the world over the next five years (very optimistic, optimistic, neutral, pessimistic, very pessimistic)?



Dashed line indicates change in mode: see Methodology, p. 45.

The majority of Australians would also oppose entities controlled by liberal democratic governments from purchasing a controlling stake in an Australian company. Two-thirds of Australians say they would oppose such a purchase from an entity controlled by the Japanese government (68%), the government of a European Union member (67%), and the United States government (66%). The lowest level of opposition is expressed towards an entity controlled by the government of the United Kingdom (58%). The United States, United Kingdom, Belgium and Japan are the top four sources of foreign investment in Australia.

AUSTRALIA AT HOME

Democracy

The past year appears to have boosted Australians' preference for democracy. In a November 2020 survey, seven in ten (71%) said 'democracy is preferable to any other kind of government', a record high in the 17 years of Lowy Institute polling. The number of Australians who said 'in some circumstances, a non-democratic government can be preferable' had fallen 6 points to 16%.

The gap between younger and older Australians on this issue — which has provoked considerable debate since this question was first asked in 2012

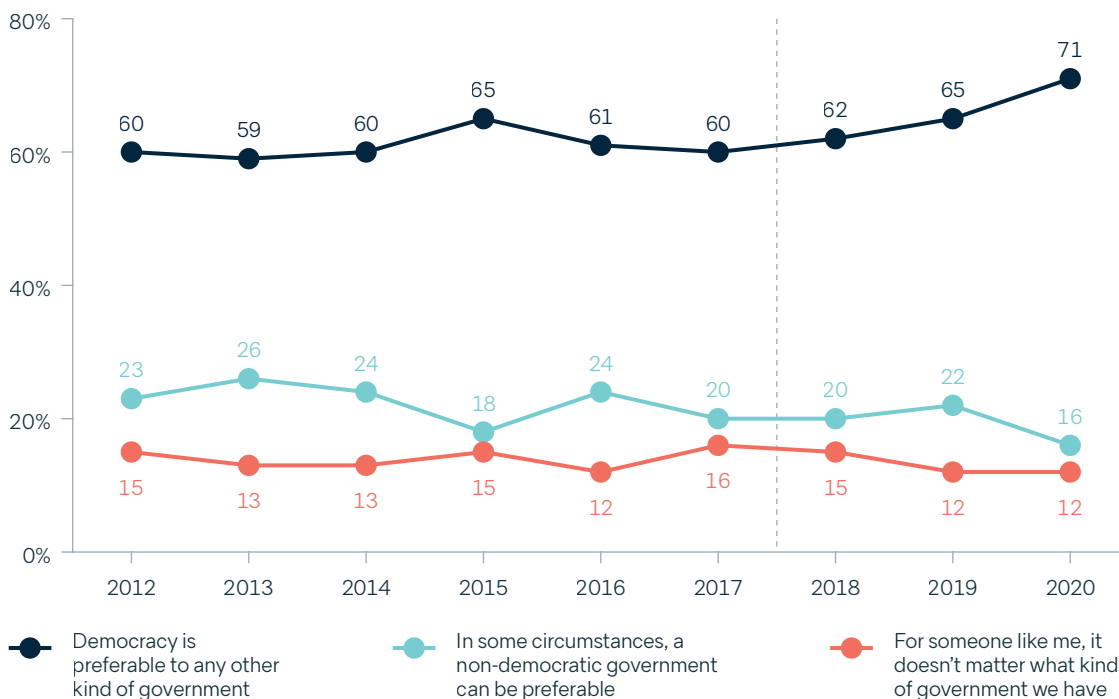
— had narrowed: 61% of 18–29 year olds expressed a preference for democracy, compared to 73% of Australians over 30. In 2012, only 39% of 18–29 year olds expressed a preference for democracy, and the gap between younger and older Australians was much larger at 21 points.

Support for democracy reached a record high during the pandemic

FIGURE 19

Democracy

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



This question was fielded in a separate Lowy Institute nationwide poll in November 2020. Dashed line indicates change in mode. See Methodology, p.45.

Australia's reputation overseas

Australians are overwhelmingly positive about the effect on their country's reputation overseas from Australia's handling of COVID-19. Almost all Australians (97%) say Australia's response to COVID-19 has had a 'very positive' or 'positive' influence on Australia's reputation in the world. This is almost the same number as those who say Australia has handled COVID-19 very or fairly well (95%, see p. 25). The majority of Australians (57%) say the influence of Australia's COVID-19 response on Australia's reputation is 'very positive'.

The vast majority of Australians also agree that Australia's diplomatic service (84%), foreign aid

program (83%) and defence force (82%) have a positive influence on our reputation overseas.

One area of foreign policy has had a less positive effect on Australia's reputation abroad, according to most Australians. A majority (54%) say that Australia's climate change policy has a negative influence on Australia's reputation overseas. This issue is divisive, however: 44% of Australians think national climate change policy has a 'very positive' or 'positive' influence on Australia's reputation overseas. This is higher than the number in 2020 (33%) who said in response to a slightly differently-worded question that Australia's 'approach to climate change' had a positive effect on its reputation on the world.

FIGURE 20

Australia's reputation overseas

Now a question about Australia's reputation overseas. Do you think each of the following factors have had a positive or negative influence on Australia's reputation overseas?

Australia's response to COVID-19



Australia's diplomatic service



Australia's foreign aid



Australia's defence force



Australia's climate change policy



Australia's place in the world

The 'Indo-Pacific' — the region comprising the Indian and Pacific Oceans and connecting seas, has become a strong theme of Australian foreign policy in recent years, and a new question this year sought to probe Australians' understanding of this concept. When asked to choose three options where Australia belonged out of the 'Indo-Pacific', 'Asia', 'the West', 'Oceania', and 'not part of anywhere', the majority (62%) select Oceania. A sizeable minority (38%) select the Indo-Pacific. One in three (32%) say Australia belongs to the West, while just 21% say Australia belongs to Asia. One in ten Australians (11%) say Australia is 'not part of anywhere'.

Coalition government report card

The Australian public give high marks to the current Coalition government for its handling of key Australian foreign policy issues, with two exceptions — China and climate change.

The highest marks are awarded for the government's response to COVID-19, for which the government scored 7.6 out of 10. Australians also score the government highly on 'maintaining Australia's national security' and 'maintaining a strong alliance with the United States' (6.8 out of 10 for both).

Australians are positive about the government's management of Australia's economy (6.6 out of 10) and also for presenting a good image of Australia internationally (6.5 out of 10).

On the question of China, Australians are more divided, awarding 5.1 marks out of 10 for the government's management of the relationship with China. As other results in the 2021 Poll show, however, more Australians lay the blame for the relationship tensions on China (see p. 13).

Australians mark the government hardest on the issue of climate change, awarding it a below-average 4.6 marks out of 10 for 'managing Australia's approach to climate change'. This is reinforced in other Poll findings, in which 60% say Australia is doing 'too little' to combat climate change (see p. 29).

FIGURE 21

Australia's place in the world

Which of the following regions do you think Australia belongs to (select up to three)?

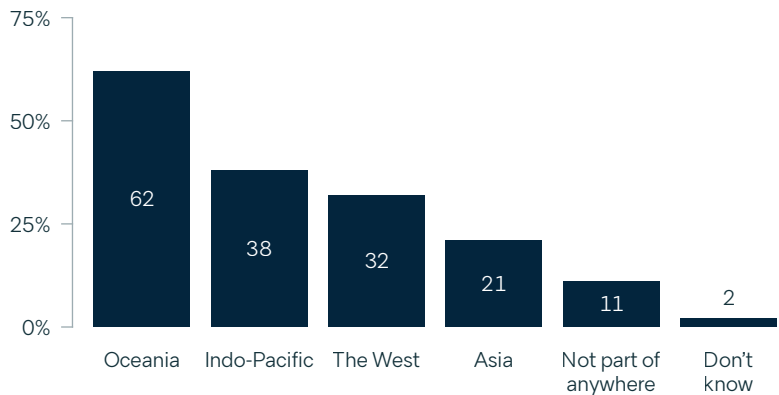
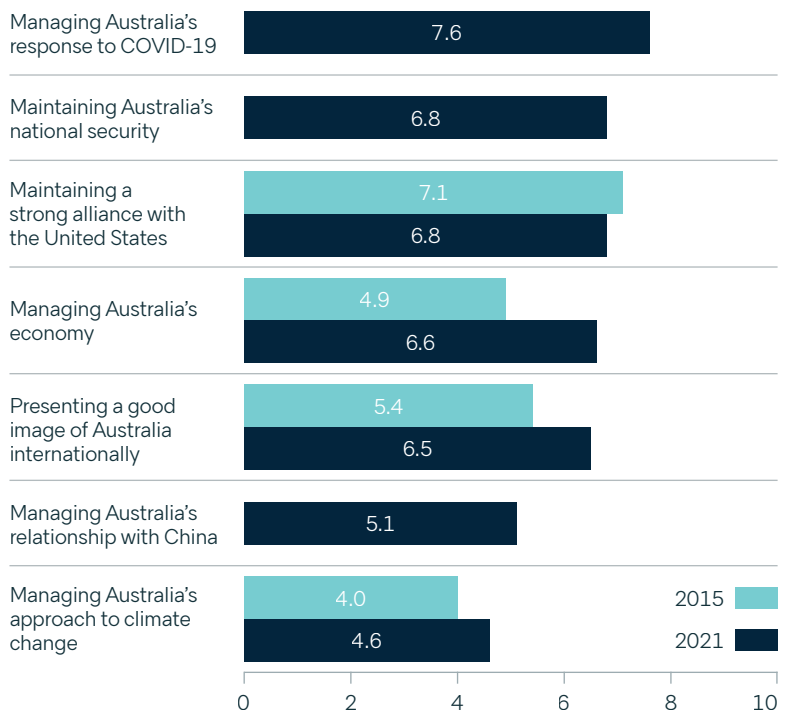


FIGURE 22

Coalition government report card

In 2019, the Coalition government was re-elected. What mark out of ten would you personally give the Coalition Government in Canberra for its performance in handling each of the following issues – with 10 meaning it has done an excellent job and 0 a very poor job. (Mean)



In 2015, the question was: 'In 2015, the Coalition government completed its first year in office. What mark out of ten would you personally give the Coalition Government in Canberra for its performance in handling each of the following issues – with 10 meaning it has done an excellent job and 1 a very poor job.' Respondents were not able to select 0. Note change in mode: see Methodology, p. 45.

FEELINGS TOWARDS OTHER COUNTRIES

For the first time, China has slipped to the bottom of the Lowy Institute 'feelings thermometer', a measurement of Australians' perceptions about countries, territories and institutions on a scale of 0° (coldest feelings) to 100° (warmest feelings). China registers a very cool 32°, a 7-degree drop this year, and a striking 26-degree cooling since 2018. In 2020, this place on the thermometer was held by Saudi Arabia and Iran.

Feelings towards Iran in 2021 remain very cold at 34°. Feelings towards Russia and Myanmar continue their cooling trend, with both rating 41° among Australians this year. Australians also feel coolly towards Qatar, at 44°.

Both India (56°) and Indonesia (55°) mark a 4-degree improvement since 2020. Feelings towards Hong Kong have remained stable in 2021 at 57°. Views of Papua New Guinea have warmed in 2021 to 60°, a 4-degree lift since 2020. Australians rate the Pacific Islands Forum a warm 66°.

Feelings towards Taiwan have increased by 5 degrees to 62° since 2020. Feelings towards South Korea have rebounded to 61° this year after a dip in 2020. Warmth towards both Germany and the European Union has remained steady in 2021, at 69° and 62° respectively. Australians also feel warmly towards Thailand (62°) and the Philippines (57°, a cooling of 4 degrees since 2018).

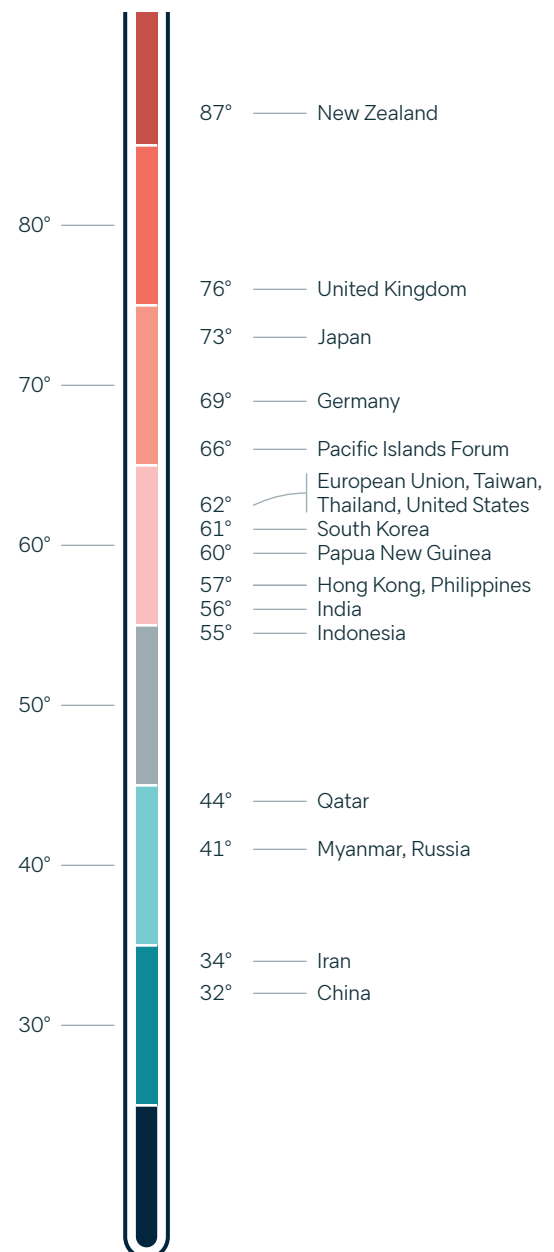
Feelings towards the United States sit at a steady 62° in the first year of Biden's administration, unchanged from 2020, and similar to the first year of the Obama presidency (64°). However, this reading is six degrees lower than the 68° recorded in the first year of the Trump administration.

Feelings towards Japan have warmed since 2020, increasing 4 degrees to 73°. Sentiment towards the United Kingdom has warmed 2 degrees to 76° since 2020, though this remains 6 degrees lower than in 2018. New Zealand again leads the Lowy Institute 'feelings thermometer' in 2021, receiving a very warm 87°, steady from 2019.

FIGURE 23

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.



THE COVID-19 PANDEMIC

Border and consular policies

As thousands of Australians continue to seek repatriation during the COVID-19 pandemic, the majority of Australians appear to support the federal government's current approach.⁶ Six in ten Australians (59%) say that the federal government has done about the right amount to bring Australians home from overseas. A third of Australians (33%) say that the federal government has not done enough, while 7% say the government has done too much.⁷

Australians hold mixed views over the question of Australia's closed borders. Four in ten Australians (41%) agree with the current policy that 'only Australians granted special exemptions should be allowed to leave'. The same number (40%) say 'Australians who have been vaccinated should be free to leave'. One in five Australians (18%) say that 'all Australians should be free to leave'. Older Australians aged 60 and above are more likely to say that once vaccinated they should be able to leave the country, with 50% agreeing with this approach. By contrast, only 36% of Australians aged 18–59 say that vaccinated Australians should be free to leave now.

FIGURE 24

Bringing Australians home

During the COVID-19 pandemic, do you think the Australian federal government has done too much, not enough or about the right amount to bring Australians home from overseas?

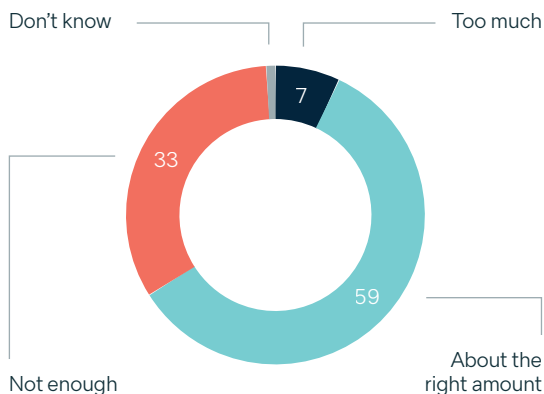
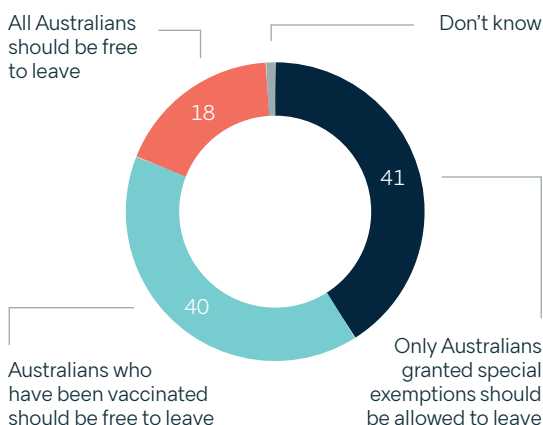


FIGURE 25

Border closures for Australians

Currently, Australians are not permitted to leave the country without applying for a special exemption. Which one of the following best describes your view?



Global responses to COVID-19

Australians continue to be extremely confident in Australia's handling of the COVID-19 pandemic, ranking Australia well ahead of five other countries included in this year's survey.

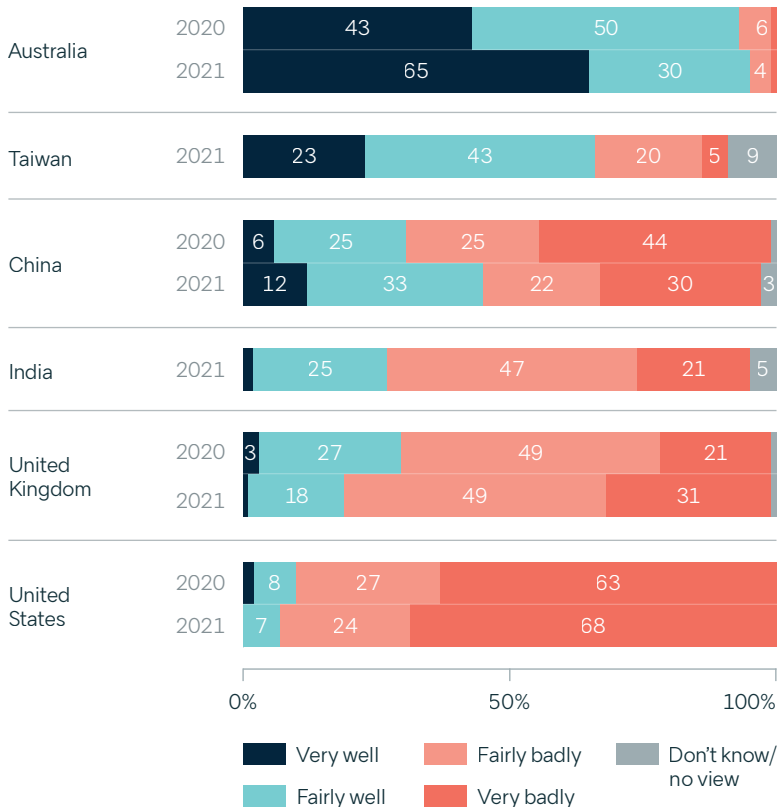
Almost all Australian adults (95%) say that Australia has handled COVID-19 'very well' or 'fairly well' so far. The proportion that say Australia has handled COVID-19 very well has jumped from 43% in 2020 to 65% in 2021.

Despite tensions in the Australia-China relationship, Australian views of China's handling of COVID-19 have improved over the past year. However, fewer than half (45%) say China has handled COVID-19 fairly or very well, an increase of 14 points from 2020.

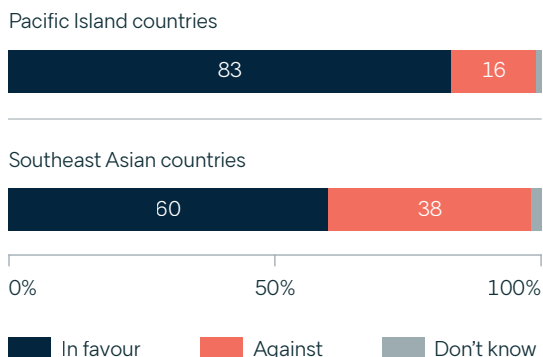
Asked about Taiwan's handling of the virus, two-thirds (66%) say that Taiwan has handled COVID-19 well. Fieldwork for the Lowy Institute Poll was carried out prior to the recent COVID-19 outbreak in Taiwan.

FIGURE 26
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 27
Foreign aid for COVID-19 vaccines

Now thinking about Australia helping other countries to access COVID-19 vaccines. Are you in favour or against Australia helping the following countries to pay for COVID-19 vaccines?



The majority of Australians say that India has not handled COVID-19 well so far, even though field-work for this polling was conducted prior to the dramatic increase in COVID-19 cases in India in April 2021. Only a quarter of Australians (27%) say India has handled COVID-19 very or fairly well.

Despite strong progress in UK and American vaccine rollouts, Australian views of the United Kingdom and the United States' handling of the COVID-19 pandemic have worsened from a low base. One in five Australians (19%) say the United Kingdom has handled COVID-19 very or fairly well, an 11-point drop from 2020.

As in 2020, the United States sits at the bottom of this list of six countries. No Australians (0%) say that the United States has handled COVID-19 very well. Only 7% of Australians say the United States has handled the pandemic fairly well. Nine in ten Australians (92%) say that the United States has handled COVID-19 very or fairly badly.

Foreign aid and COVID-19

While many have been wary of Australia investing in foreign aid in the past,⁸ the vast majority in 2021 (83%) say that Australia should help Pacific Islands countries to pay for COVID-19 vaccines. Over the course of the past six months, the Australian government has pledged over \$800 million in funding for vaccines in Pacific Island and Southeast Asian countries.⁹

A majority (60%) also say that Australia should help Southeast Asian countries to pay for COVID-19 vaccines. Younger Australians are more likely to support vaccine assistance for Southeast Asian countries than older Australians, with seven in ten 18–29 year olds (70%) saying that Australia should fund vaccines for Southeast Asia, compared to 56% of Australians over 30. More than 80% across all age groups polled say that Australia should fund vaccines for Pacific Island countries.

CLIMATE POLL 2021

Levels of concern about climate change

A separate survey fielded in April 2021 found that while the COVID-19 pandemic appeared to temper concerns about climate change in 2020, the issue has risen to prominence again for Australians. The majority of Australians (60%) say 'global warming is a serious and pressing problem. We should begin taking steps now, even if this involves significant costs'. This represents a reversal of the dip in 2020 during the early days of the pandemic, but remains 8 points below the high watermark of concern in 2006.

A third of Australians (30%) say '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'. Only 9% of Australians — one of the lowest results of the

past decade — say that 'until we are sure that global warming is really a problem, we should not take any steps that would have economic costs'.

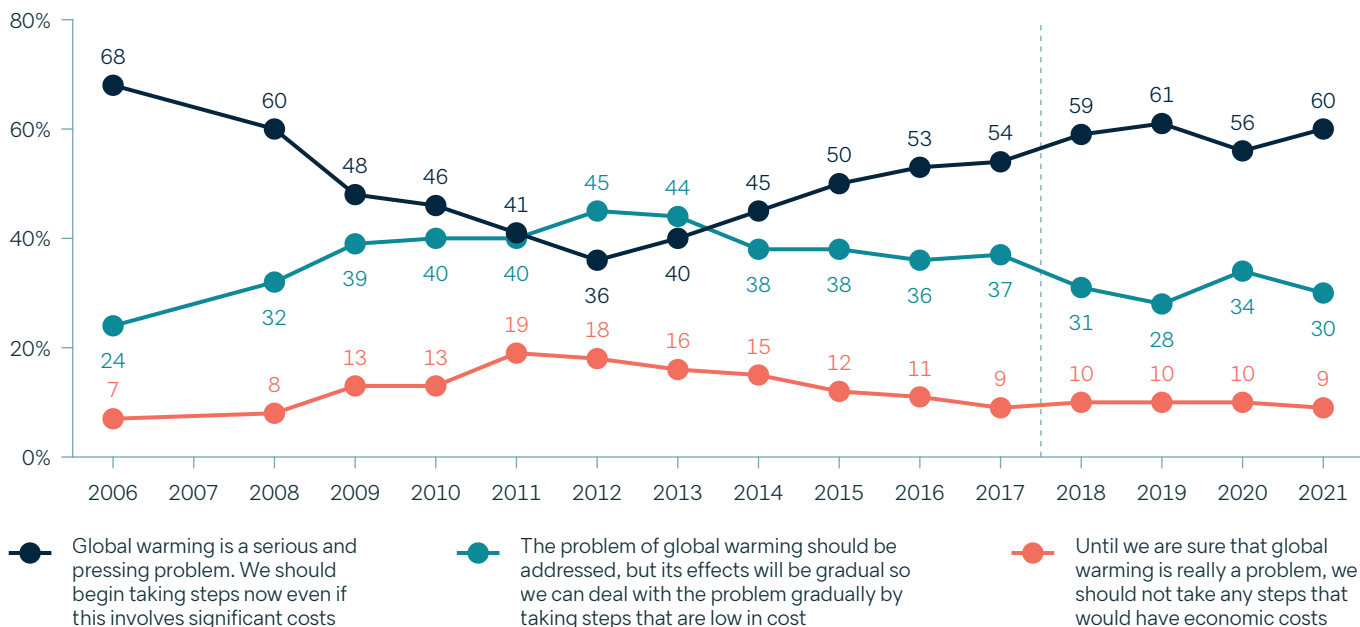
As in recent years, there is a significant gap between younger and older Australians' concerns about global warming. Despite a slight narrowing between the generations, the margin is still noteworthy, with three-quarters (76%) of Australians aged 18–29 saying global warming is a serious and pressing problem, compared with 50% of those over 60.

The gap in concern appears to be narrowing slightly between the urban and rural populations, with just a 7-point gap between the 63% of Australians living in cities saying that global warming is a serious and pressing problem, and the 56% of the regional and remote population.

FIGURE C1

Attitudes to 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.



This question was asked in the annual Lowy Institute Poll in March 2021.
Dashed line indicates change in mode: see Methodology, p.45.

FIGURE C2

Costs and benefits of climate change action

When thinking about the possible benefits and possible costs of further action on climate change, which of the following two statements is closer to your own view?

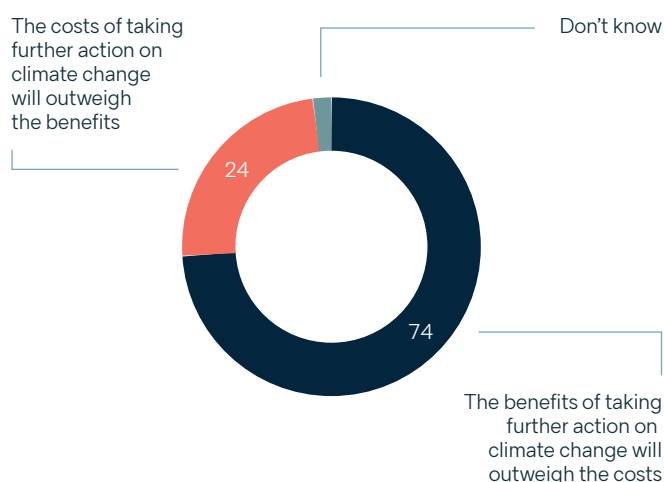
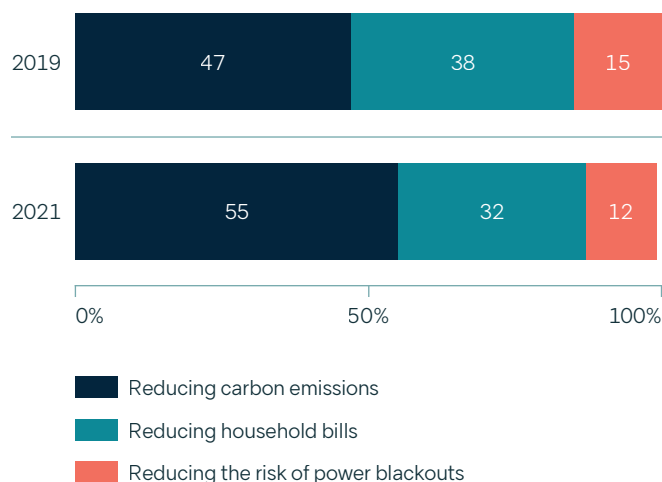


FIGURE C3

Energy policy priorities

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

**Australian government policies on climate change**

When considering the potential costs and benefits of climate change policies, most Australians see the benefits as outweighing the costs. Three-quarters of Australians (74%) say 'the benefits of taking further action on climate change will outweigh the costs'. The alternate view is held by 24%, who say 'the costs of taking further action on climate change will outweigh the benefits'.

Support for reducing carbon emissions as a priority for the federal government has increased in the past two years. When asked what the government's main priority should be in terms of energy policy, the majority of Australians (55%) say 'reducing carbon emissions' should be the main priority. This has increased 8 points since 2019 and is now a view held by the majority. A third (32%) say 'reducing household bills' should be the government's priority, a decrease of 6 points since 2019. Only 12% say the government should prioritise 'reducing the risk of power blackouts'.

Looking at a range of possible federal government policies, almost all Australians (91%) say they would support the federal government 'providing subsidies for the development of renewable energy technology'. This aligns with Lowy Institute polling in 2018 in which 84% of Australians said the government should focus on renewables rather than traditional energy sources.¹⁰

Eight in ten Australians (78%) support 'setting a net-zero emissions target for 2050', suggesting they seek a firmer commitment from Prime Minister Scott Morrison, who has said that Australia's "goal is to reach net zero emissions as soon as possible, and preferably by 2050".¹¹

Three-quarters (77%) support providing subsidies for the purchase of electric vehicles. A sizeable majority of Australians (64%) support introducing an emissions trading scheme or a carbon tax. These views have shifted significantly in the past five years. In 2016, in response to a differently-worded question in the Lowy Institute Poll, only 40% said they would prefer the government to introduce an emissions trading scheme or price on carbon.¹²

Australian views of coal exports and coal mines also appear to have shifted significantly in recent years. Six in ten Australians (63%) support a ban on new coal mines opening in Australia. The same proportion of the population (63%) say they support reducing Australian coal exports to other countries. Five years ago, a majority (66%) said Australia should continue to export coal.¹³ In 2021, only three in ten Australians (30%) say they support the federal government providing subsidies for building new coal-fired power plants.

On a number of these policies, there is a significant gap between support from younger and older Australians. For example, 72% of Australians aged 18–44 support banning new coal mines, compared to 55% of Australians aged over 45.

Similarly, 71% of respondents aged 18–44 support imposing a carbon tax or emissions trading scheme, compared to 57% of Australians over 45.

The federal government's promotion of a 'gas-fired recovery' for Australia's economy¹⁴ appears to have general support, with 58% in favour of Australia increasing the use of gas for energy generation.

Australians are split over the question of nuclear power, which has been prohibited in Australia since 1998.¹⁵ Almost half the population (47%) would support removing the existing ban on nuclear power, but 51% are opposed to that measure.

FIGURE C4

Potential federal government policies on climate

Would you support or oppose the following federal government policies?

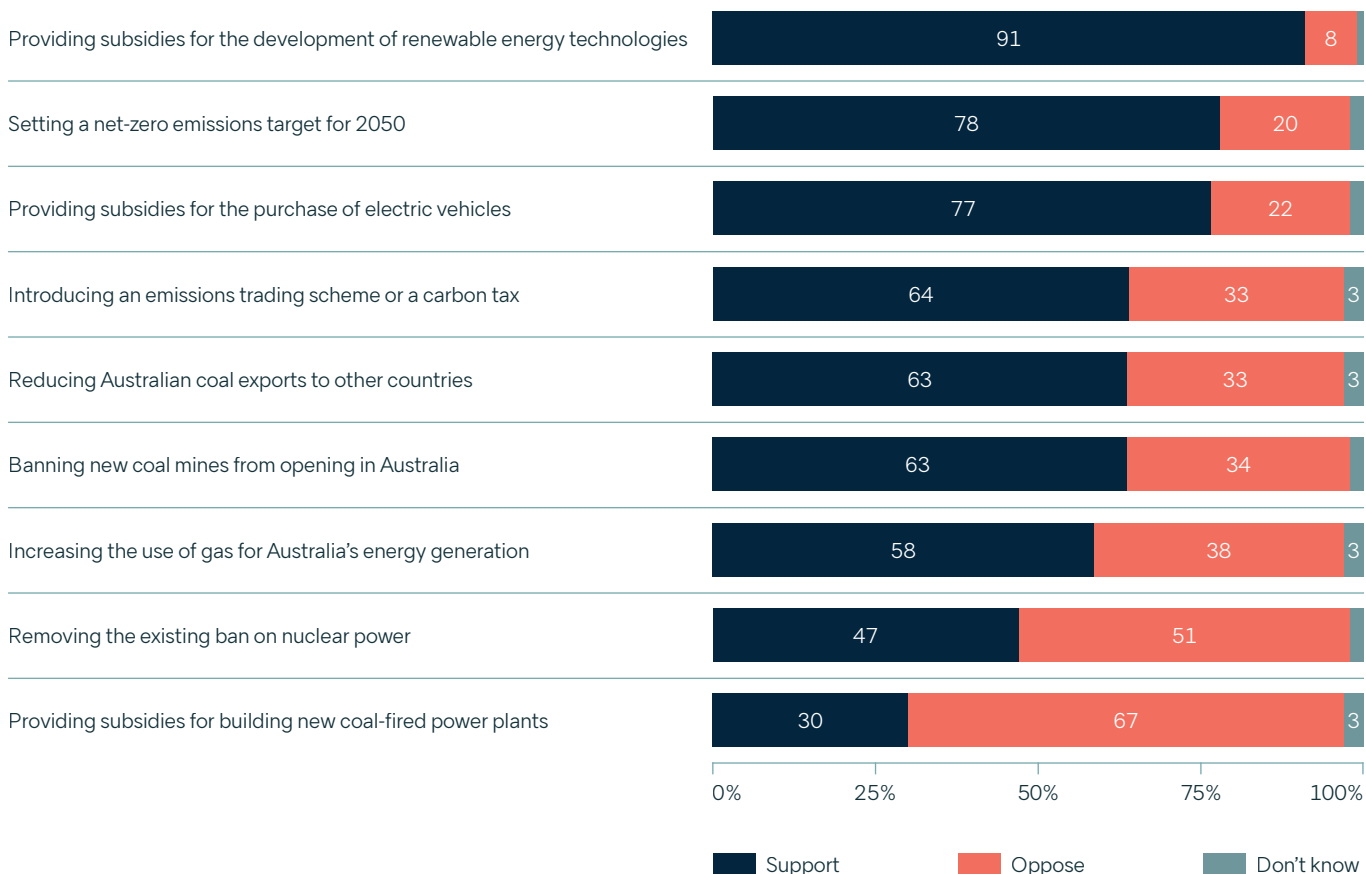
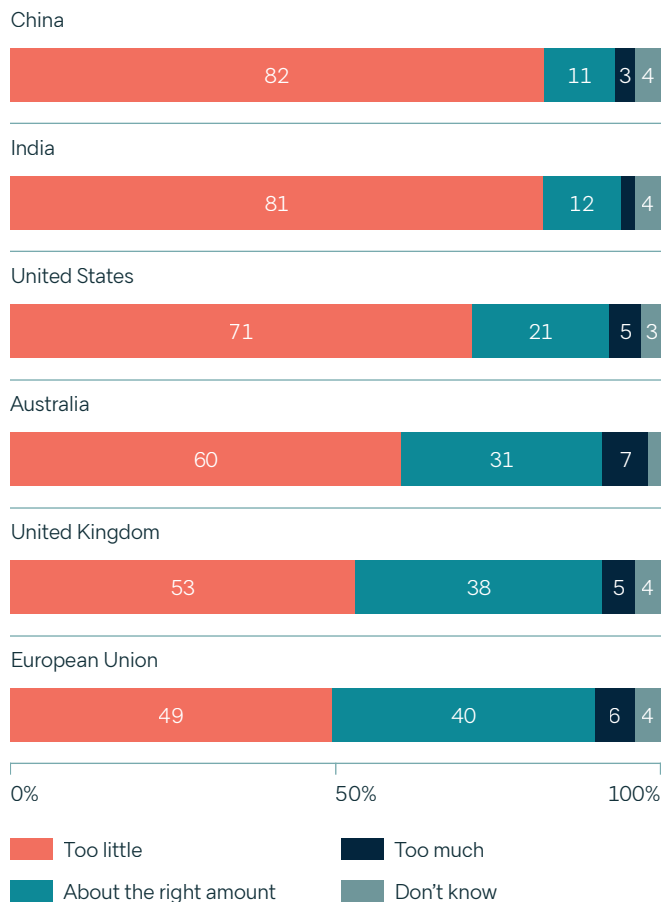


FIGURE C5

Climate change efforts by country

Here is a list of countries and economies. In your opinion, is that country or economy doing too much, too little, or about the right amount to combat climate change?



International climate change policies

In advance of the United Nations Climate Change Conference to be hosted by the United Kingdom in Glasgow in late 2021, the majority of Australians would like to see large countries do more to combat climate change. Eight in ten Australians say that China (82%) and India (81%) are doing 'too little' in their efforts to combat climate change.

When it comes to the United States' efforts, a large majority (71%) say the United States is doing too little to combat climate change. One in five Australians (21%) say the United States is doing about the right amount to combat climate change.

Six in ten Australians (60%) say Australia is doing too little in its efforts to combat climate change, while one third (31%) say Australia is doing about the right amount.

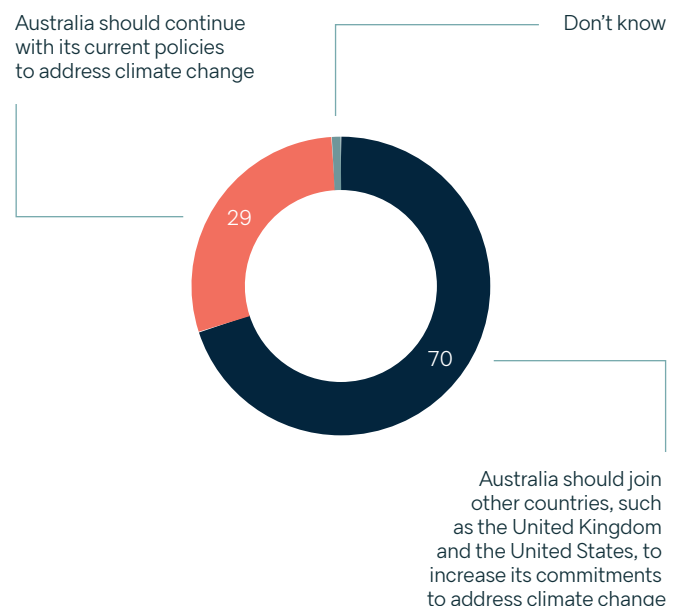
Australians appear to be the most satisfied with the efforts of the United Kingdom and the European Union. However, a slim majority (53%) still say the United Kingdom is doing too little. Half the population (49%) say the European Union is doing too little, while four in ten Australians (40%) say the European Union is doing about the right amount.

Most Australians want Australia to increase its ambitions on climate change policy. Less than a third (29%) say Australia should continue with its current policies.

FIGURE C6

Australia's approach to international climate change negotiations

In the lead up to the 2021 United Nations Climate Change Conference in Glasgow, which one of the following two statements most closely represents your own view of the approach the Australian government should take in international climate change negotiations?



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 45.

TABLE 1

Trust in global powers

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

	2021 (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	
Australia	46	46	92	7	1	8	0
United Kingdom	28	59	87	12	1	13	0
Japan	29	58	87	11	2	13	0
United States	13	48	61	31	8	39	0
India	7	54	61	32	7	39	1
Indonesia	2	46	48	42	9	51	1
Russia	2	24	26	47	27	74	0
China	2	14	16	37	47	84	0

	A great deal										Total: 'a great deal' and 'somewhat'									
	2006	2008	2009	2011	2017	2018	2019	2020	2021		2006	2008	2009	2011	2017	2018	2019	2020	2021	
Australia	-	-	-	-	-	-	-	-	46		-	-	-	-	-	-	-	-	92	
United Kingdom	-	-	-	-	50	45	-	24	28		-	-	-	-	90	90	-	84	87	
Japan	19	15	33	30	31	33	-	22	29		73	68	81	83	86	87	-	82	87	
United States	19	24	39	40	20	15	14	12	13		60	69	83	83	61	55	52	51	61	
India	9	8	10	7	9	8	-	4	7		68	55	61	61	64	59	-	45	61	
Indonesia	-	-	6	5	5	-	-	2	2		-	-	45	46	52	-	-	36	48	
Russia	-	7	7	7	5	3	-	2	2		-	53	59	53	38	28	-	24	26	
China	7	7	7	12	8	7	4	4	2		60	47	59	60	54	52	32	23	16	

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.

	2021 (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	63	28	91	4	2	6	2	1
US President Joe Biden	18	51	69	18	9	27	1	3
Australian Prime Minister Scott Morrison	30	37	67	20	12	32	0	1
German Chancellor Angela Merkel	25	42	67	10	3	13	12	7
Japanese Prime Minister Yoshihide Suga	14	47	61	12	2	14	15	10
UK Prime Minister Boris Johnson	13	46	59	26	11	37	1	3
Australian Opposition leader Anthony Albanese	13	43	56	22	11	33	6	6
Indian Prime Minister Narendra Modi	4	34	38	24	8	32	19	11
Indonesian President Joko Widodo	2	24	26	34	11	45	18	11
Russian President Vladimir Putin	3	13	16	33	45	78	2	5
Chinese President Xi Jinping	2	8	10	25	53	78	7	5
North Korean leader Kim Jong-un	1	4	5	15	75	90	2	4

	Total: 'a lot of' and 'some' confidence			
	2018	2019	2020	2021
New Zealand Prime Minister Jacinda Ardern	–	88	87	91
US President Joe Biden (Donald Trump 2018–2020)	30	25	30	69
Australian Prime Minister Scott Morrison (Malcolm Turnbull 2018)	63	58	60	67
German Chancellor Angela Merkel	–	–	–	67
Japanese Prime Minister Yoshihide Suga (Shinzo Abe 2018–2020)	66	–	73	61
UK Prime Minister Boris Johnson (Theresa May 2018)	68	–	55	59
Australian Opposition leader Anthony Albanese (Bill Shorten 2019)	–	52	58	56
Indian Prime Minister Narendra Modi	37	–	42	38
Indonesian President Joko Widodo	–	34	32	26
Russian President Vladimir Putin	19	21	–	16
Chinese President Xi Jinping	43	30	22	10
North Korean leader Kim Jong-un	5	7	6	5

TABLES OF RESULTS

TABLE 3

Importance of the US alliance

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

	2005	2006	2007	2008	2009	2010	2011	2012	2013	2014	2015	2016	2017	2018	2019	2020	2021
Very important	45	42	36	42	55	56	59	59	54	52	53	42	53	48	38	43	47
Fairly important	27	28	27	34	30	30	23	28	28	26	27	29	24	28	34	35	31
Total: very and fairly important	72	70	63	76	85	86	82	87	82	78	80	71	77	76	72	78	78
Somewhat important	20	22	27	20	12	12	15	12	16	17	16	22	18	20	23	18	20
Not at all important	7	8	9	4	2	2	3	1	3	4	4	7	4	4	4	4	2
Don't know/no view	1	1	1	0	0	0	0	0	0	0	1	1	1	1	0	1	0

TABLE 4

Attitudes to the United States

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

	Agree	Disagree	Neither agree nor disagree	No view/ Don't know
Australians and Americans share many common values and ideals. A strong alliance is a natural extension of this	76	22	0	1
The United States would come to Australia's defence if Australia was under threat	75	23	0	2
Donald Trump has weakened Australia's alliance with the United States	58	40	0	1
The United States is in decline relative to China and so the alliance is of decreasing importance	36	61	0	2

	Ranked by % saying 'agree'			
	2011	2015	2019	2021
Australians and Americans share many common values and ideals. A strong alliance is a natural extension of this	78	77	73	76
The United States would come to Australia's defence if Australia was under threat	–	–	73	75
Donald Trump has weakened Australia's alliance with the United States	–	–	66	58
The United States is in decline relative to China and so the alliance is of decreasing importance	41	37	46	36

TABLE 5**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?

	2015	2017	2018	2020	2021
More of a security threat ^a	15	13	12	41	63
More of an economic partner	77	79	82	55	34
Both equally	4	5	0	3	1
Neither	2	0	3	0	0
Don't know/no view	3	3	3	1	1

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

TABLE 6**Tensions in the Australia-China relationship**

Which country is more to blame for the tensions in the Australia-China relationship?

China is more to blame	They are equally to blame	Australia is more to blame	Don't know
56	38	4	1

TABLES OF RESULTS

TABLE 7

Views of China

Now a question about China. For each of the following factors, please indicate whether, for you personally, they have a positive or negative influence on your overall view of China.

	2016			2021		
	Positive influence	Negative influence	Neither/don't know/no view	Positive influence	Negative influence	Neither/don't know/no view
Chinese people you have met	85	11	4	76	21	2
China's culture and history	79	15	6	68	30	2
China's economic growth	75	19	7	47	50	3
Chinese investment in Australia	37	59	5	20	79	1
China's environmental policies	17	67	15	17	79	4
China's system of government	15	73	11	6	92	2
China's military activity in our region	9	79	12	5	93	2

TABLE 8

Attending the Winter Olympics in China

The Winter Olympics are scheduled to be held in China in 2022. Do you think Australia should attend the Winter Olympics, or should not attend because of China's human rights record?

Yes, should attend	No, should not attend	Don't know
51	45	5

TABLE 9

Australian media reporting about China

Overall, would you say Australian media reporting about China is:^b

Too positive	Fair and balanced	Too negative	Don't know
10	61	26	3

^b This survey was fielded in a separate Lowy Institute nationwide poll in November 2020: see Methodology, p.45.

TABLE 10

Military conflict between China and the United States

In the event of a military conflict between China and the United States, please say which one of the following statements comes closest to your own personal view.

Australia should remain neutral	Australia should support the United States	Australia should support China	Don't know
57	41	1	1

TABLE 11

Good relations with the United States and China

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

	2013	2018	2021
Yes, possible	87	81	72
No, not possible	12	13	27
Neither/don't know/no view	1	7	1

TABLE 12

Feelings of safety

Now about world events, how safe do you feel?

	2005	2006	2007	2008	2009	2010	2015	2017	2018	2020	2021
Very safe	30	30	40	35	44	42	24	20	18	4	6
Safe	61	56	50	57	46	50	56	59	60	46	64
Total: safe	91	86	90	92	90	92	80	79	78	50	70
Unsafe	7	10	8	8	7	5	16	16	20	41	27
Very unsafe	1	3	1	1	2	2	3	5	1	9	3
Total: unsafe	8	13	9	9	9	7	19	21	21	50	30
Don't know/no view	1	0	1	0	1	1	1	1	1	0	0

TABLE 13

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.

	2021 (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
Cyberattacks from other countries	62	36	98	2	0
Climate change	61	29	90	9	0
COVID-19 and other potential epidemics ^o	59	36	95	4	0
Australia-China relations	56	40	96	3	0
North Korea's nuclear program	56	35	91	8	0
A military conflict between US and China over Taiwan	52	42	94	5	1
International terrorism	51	44	95	5	0
A severe downturn in the global economy	50	47	97	3	0
Foreign interference in Australian politics	49	45	94	6	0
Right-wing extremism	42	45	87	11	1
The influence of social media companies	39	51	90	10	0
A lower rate of immigration into Australia	9	49	58	41	1

	Percentage saying 'critical threat' (ranked by 2021 responses)								
	2006	2008	2009	2014	2017	2018	2019	2020	2021
Cyberattacks from other countries	-	-	-	51	55	57	62	-	62
Climate change ['global warming' from 2006-09]	68	66	52	46	57	58	64	59	61
COVID-19 and other potential epidemics	-	-	-	-	-	-	-	76	59
Australia-China relations	-	-	-	-	-	-	-	-	56
North Korea's nuclear program	-	-	-	-	65	66	60	-	56
A military conflict between US and China over Taiwan	-	-	-	-	-	-	-	35	52
International terrorism	73	66	68	65	68	66	61	46	51
A severe downturn in the global economy	-	-	-	-	53	50	51	71	50
Foreign interference in Australian politics	-	-	-	-	-	41	49	42	49
Right-wing extremism	-	-	-	-	-	-	-	-	42
The influence of social media companies	-	-	-	-	-	-	-	-	39
A lower rate of immigration into Australia	-	-	-	-	-	-	-	-	9

^o In 2020, asked as 'novel coronavirus (COVID-19) and other potential epidemics'.

TABLE 14**Foreign influence**

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

	2018		2020	
	China	United States	China	United States
Yes, concerned	63	58	82	61
No, not concerned	34	40	18	38
Don't know/no view	3	2	0	0

^dThis survey was fielded in a separate Lowy Institute nationwide poll in November 2020, see Methodology, p.45.

TABLE 15**Economic optimism**

Thinking 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	2021
Very optimistic	14	19	11	16	19	13	14	9	9	9	5	3	10
Optimistic	53	52	65	70	67	61	62	54	61	65	60	49	69
Total: optimistic	67	71	76	86	86	74	76	63	70	74	65	52	79
Pessimistic	8	9	19	11	10	20	15	29	25	20	30	38	19
Very pessimistic	2	2	4	2	3	5	6	5	5	4	4	10	3
Total: pessimistic	10	11	23	13	13	25	21	34	30	24	34	48	22
Neutral ^e	21	17	-	-	-	-	-	-	-	-	-	-	-
Don't know / no view	2	2	1	1	1	1	3	3	1	3	1	0	0

^eA neutral option was offered to respondents in 2005 and 2007.

TABLE 16

Foreign investment with government involvement

Are you in favour or opposed to a company, bank or investment fund controlled by the following foreign governments buying a controlling stake in a major Australian company?

	2008 ^f			2021		
	In favour	Opposed	Don't know	In favour	Opposed	Don't know
United Kingdom	43	52	5	40	58	2
United States	34	63	4	32	66	2
A member of the European Union	–	–	–	31	67	2
Japan	22	72	6	30	68	2
Hong Kong	–	–	–	12	86	2
China	17	78	6	6	92	1

^fIn 2008, the question asked 'If a company, bank or investment fund controlled by a foreign government was trying to buy a controlling stake in a major Australian company: please say whether you would be strongly in favour, in favour, opposed, strongly opposed'. The 'strongly in favour' and 'in favour' responses have been grouped together, as have the 'strongly opposed' and 'opposed' responses.

TABLE 17

Democracy

Now a question about democracy. I am going to read you three statements about democracy. Please say which one of the three statements comes closest to your own personal views about democracy.⁹

	2012	2013	2014	2015	2016	2017	2018	2019	2020
Democracy is preferable to any other kind of government	60	59	60	65	61	60	62	65	71
In some circumstances, a non-democratic government can be preferable	23	26	24	18	24	20	20	22	16
For someone like me, it doesn't matter what kind of government we have	15	13	13	15	12	16	15	12	12
Don't know/no view	1	2	3	2	3	4	3	1	1

⁹ This survey was fielded in a separate Lowy Institute nationwide poll in November 2020: see Methodology, p.45.

TABLE 18**Australia's reputation overseas**

Now a question about Australia's reputation overseas. Do you think each of the following factors have had a positive or negative influence on Australia's reputation overseas?

	Very Positive	Positive	Total very positive/ positive	Negative	Very negative	Total negative/ very negative	Don't know
Australia's response to COVID-19	57	40	97	3	1	4	1
Australia's diplomatic service	9	75	84	13	1	14	3
Australia's foreign aid	14	69	83	13	2	15	1
Australia's defence force	13	69	82	14	2	16	2
Australia's climate change policy	4	40	44	36	18	54	2

TABLE 19**Australia's place in the world**

Thinking about Australia's place in the world, which of the following do you think Australia belongs to? (*select up to three*)

Oceania	Indo-Pacific	The West	Asia	Not part of anywhere	Don't know
62	38	32	21	11	2

TABLE 20**Coalition report card**

In 2019, the Coalition government was re-elected. What mark out of ten would you personally give the Coalition government in Canberra for its performance in handling each of the following issues – with 10 meaning it has done an excellent job and 0 a very poor job.

(Mean)	2015 ^h	2021
Managing Australia's response to COVID-19	–	7.6
Maintaining Australia's national security	–	6.8
Maintaining a strong alliance with the United States	7.1	6.8
Managing Australia's economy	4.9	6.6
Presenting a good image of Australia internationally	5.4	6.5
Managing Australia's relationship with China	–	5.1
Managing Australia's approach to climate change	4.0	4.6

^h In 2015, the question was: 'In 2015, the Coalition government completed its first year in office. What mark out of ten would you personally give the Coalition Government in Canberra for its performance in handling each of the following issues – with 10 meaning it has done an excellent job and 1 a very poor job.' Respondents were not able to select 0.

TABLE 21

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.ⁱ

	2006	2007	2008	2009	2010	2011	2012	2013	2014	2015	2016	2017	2018	2019	2020	2021
New Zealand	–	81	–	83	84	85	85	–	84	83	–	85	86	86	–	87
United Kingdom/ England/Britain ^j	74	75	77	–	–	79	–	77	–	79	–	81	82	76	74	76
Japan	64	63	64	66	64	67	70	65	67	68	70	71	74	72	69	73
Germany	–	–	–	68	–	–	–	70	–	71	72	71	71	–	–	69
Pacific Islands Forum	–	–	–	–	–	–	–	–	–	–	–	–	–	–	–	66
United States/USA	62	60	64	67	68	70	71	70	71	73	68	69	67	63	62	62
European Union	–	–	–	–	–	–	–	–	–	–	–	62	67	66	60	62
Taiwan	–	–	–	–	–	58	–	–	–	–	59	–	60	59	57	62
Thailand	–	–	–	59	–	63	–	–	–	–	–	–	–	61	–	62
South Korea	56	–	50	53	–	57	61	–	59	–	–	60	62	–	57	61
Papua New Guinea	63	57	60	–	62	–	64	60	59	58	63	61	63	59	56	60
Philippines	–	–	–	–	–	–	–	–	–	–	–	59	61	–	–	57
Hong Kong	–	–	–	–	–	–	–	–	–	–	–	–	–	63	58	57
India	62	55	57	56	55	56	58	55	57	56	59	60	58	53	52	56
Indonesia	50	47	50	49	54	51	54	53	52	46	54	55	54	51	51	55
Qatar	–	–	–	–	–	–	–	–	–	–	–	–	–	–	–	44
Myanmar ^k	–	–	–	46	–	–	50	50	50	–	55	54	50	46	–	41
Russia	–	–	55	–	55	–	–	–	–	45	52	50	47	43	42	41
Iran	43	34	38	38	38	35	38	38	39	–	40	–	–	–	33	34
China	61	56	56	53	54	53	59	54	60	58	58	59	58	49	39	32

ⁱ 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'.

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

^k Until 2019, asked as 'Myanmar/Burma'. From 2021, asked as 'Myanmar'.

TABLE 22

Bringing Australians home

During the COVID-19 pandemic, do you think the Australian federal government has done too much, not enough or about the right amount to bring Australians home from overseas?

Too much	About the right amount	Not enough	Don't know
7	59	33	1

TABLE 23

Border policies

Currently, Australians are not permitted to leave the country without applying for a special exemption. Which one of the following best describes your view?

Only Australians granted special exemptions should be allowed to leave	Australians who have been vaccinated should be free to leave	All Australians should be free to leave	Don't know
41	40	18	1

TABLE 24

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: very well and fairly well	Fairly badly	Very badly	Don't know/no view
Australia	2020	43	50	93	6	1	0
	2021	65	30	95	4	1	0
Taiwan	2021	23	43	66	20	5	9
China	2020	6	25	31	25	44	1
	2021	12	33	45	22	30	3
India	2021	2	25	27	47	21	5
United Kingdom	2020	3	27	30	49	21	1
	2021	1	18	19	49	31	1
United States	2020	2	8	10	27	63	0
	2021	0	7	7	24	68	0

TABLE 25

Foreign aid and COVID-19

Now thinking about Australia helping other countries to access COVID-19 vaccines. Are you in favour or against each of the following?

	In favour	Against	Don't know
Australia helping Pacific Island countries to pay for COVID-19 vaccines	83	16	1
Australia helping Southeast Asian countries to pay for COVID-19 vaccines	60	38	2

CLIMATE POLL 2021: TABLES OF RESULTS

TABLE C1

Attitudes to 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.¹

	2006	2008	2009	2010	2011	2012	2013	2014	2015	2016	2017	2018	2019	2020	2021
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	60
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	30
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	9
Don't know/refused	1	0	1	1	1	1	1	2	0	0	0	1	1	0	0

¹ This question was fielded in the 2021 Lowy Institute Poll.

TABLE C2**Costs and benefits of climate change action**

When thinking about the possible benefits and possible costs of further action on climate change, which of the following two statements is closer to your own view?

The benefits of taking further action on climate change will outweigh the costs	The costs of taking further action on climate change will outweigh the benefits	Don't know
74	24	2

TABLE C3**Energy policy priorities**

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

	2019	2021
Reducing carbon emissions	47	55
Reducing household bills	38	32
Reducing the risk of power blackouts	15	12
Don't know	1	1

TABLE C4**Potential federal government policies**

Would you support or oppose the following federal government policies?

	Support	Oppose	Don't know
Providing subsidies for the development of renewable energy technologies	91	8	1
Setting a net-zero emissions target for 2050	78	20	2
Providing subsidies for the purchase of electric vehicles	77	22	2
Introducing an emissions trading scheme or a carbon tax	64	33	3
Reducing Australian coal exports to other countries	63	33	3
Banning new coal mines from opening in Australia	63	34	2
Increasing the use of gas for Australia's energy generation	58	38	3
Removing the existing ban on nuclear power	47	51	2
Providing subsidies for building new coal-fired power plants	30	67	3

TABLE C5**International efforts on climate change**

Here is a list of countries and economies. In your opinion, is that country or economy doing too much, too little, or about the right amount to combat climate change?

	Too little	About the right amount	Too much	Don't know
China	82	11	3	4
India	81	12	2	4
United States	71	21	5	3
Australia	60	31	7	2
United Kingdom	53	38	5	4
European Union	49	40	6	4

TABLE C6**Approach to UN climate negotiations**

In the leadup to the 2021 United Nations Climate Change Conference in Glasgow, which one of the following two statements most closely represents your own view of the approach the Australian government should take in international climate change negotiations?

Australia should join other countries, such as the United Kingdom and the United States, to increase its commitments to address climate change	Australia should continue with its current policies to address climate change	Don't know
70	29	1

ABOUT THE POLL

Methodology

The 2021 Lowy Institute Poll reports the results of a national survey of 2222 Australian adults between 15 and 29 March 2021. 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 or via their address (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 (95% of respondents) and computer-assisted telephone interviewing (5% of respondents) to provide coverage of the offline population (households without internet access). The order of questions in the questionnaire was different from the order presented in this report.

On a simple random sample of 2222 responses, the margin of error is 2.1%. Where a complex sample is used, the ‘design effect’ measures the additional variance in comparison with a simple random sample. The design effect for this survey is estimated at 1.97. For the 2021 Lowy Institute Poll survey, a completion rate of 83.8% was achieved. Taking into account the recruitment rate to the panel and attrition from the panel, the cumulative response is 7.1%, which compares favourably with many international probability-based panels. Unlike other commercial online panels in Australia, the probability basis of the Life in Australia™ sampling method means results are generalisable to the national population and sampling errors and confidence intervals can be calculated.

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, the 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 Life in Australia™. In 2019, the Lowy Institute Poll was administered in the same way as in 2020: with approximately 90% of respondents online and 10% 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, primarily through its American Trends Panel, another probability-based online panel. The Chicago Council on Global Affairs, 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.

ABOUT THE POLL

Some questions in the 2021 Lowy Institute Poll are new and are not affected by the possibility of '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 2021 survey are 'tracking' questions that have been asked in previous Lowy Institute polls, allowing us to compare public opinion on a single issue over time. Footnotes and dotted lines have been used in the charts in the Poll to represent this change of mode, which can elicit slightly different responses.

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

Climate Poll 2021

Climate Poll 2021 by the Lowy Institute reports the results of a nationally representative online and telephone survey conducted by the SRC between 12 and 26 April 2021, with a sample size of 3286 Australian adults. The order of questions in the survey was different from the order presented in this report. The survey was also conducted using the Life in Australia™ panel as explained above. SRC uses a mixed-mode approach for the panel, including online surveys (95% of respondents) and computer-assisted telephone interviewing (5% of respondents) to provide coverage of the offline population (households without internet access).

On a simple random sample of 3286 responses, the margin of error is approximately 1.7%. 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 1.62. A completion rate of 82.1% was

achieved. Taking into account the recruitment rate to the panel and attrition from the panel, the cumulative response is 7.1%

Figure C1 was asked in the annual Lowy Institute Poll, as per the above methodology.

November 2020 poll

As a part of the Lowy Institute's Being Chinese in Australia report, released in March 2021, SRC conducted a parallel national survey on 3029 adults between 9 and 23 November 2020. The survey was conducted by the SRC, using the Life in Australia™ panel. SRC uses a mixed-mode approach for the panel, including online surveys (89% of respondents) and computer-assisted telephone interviewing (11% of respondents) to provide coverage of the offline population (households without internet access). The questions on democracy, foreign influence and Australian media reporting about China that are included in this poll were fielded during this survey.

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NOTES

- 1 From 2015–18, the question was phrased: ‘is China more of an economic partner or more of a military threat?’
- 2 This question was asked in the Lowy Institute’s COVIDpoll, based on a nationally representative survey of Australians in April 2020.
- 3 CGTN, Full text: Xi Jinping’s speech at the General Debate of the 75th session of the United Nations General Assembly, <https://news.cgtn.com/news/2020-09-23/Full-text-Xi-Jinping-s-speech-at-General-Debate-of-UNGA-U07X2dn8Ag/index.html>, 23 September 2020.
- 4 See for example Natasha Kassam, 2019 Lowy Institute Poll, <https://www.lowyinstitute.org/publications/lowy-institute-poll-2019>, 26 June 2019.
- 5 Natasha Kassam, 2019 Lowy Institute Poll, 20 June 2019, <https://www.lowyinstitute.org/publications/2019-lowy-institute-poll>.
- 6 Lynette Wood, Foreign Affairs, Defence and Trade Legislation Committee, Additional Budget Estimates, 25 March 2021, 8, <https://parlinfo.aph.gov.au/parlInfo/search/display/display.w3p;query=id%3A%22committees%2Festimate%2F0cc7fe55-035d-4bfd-aa07-044df889d14f%2F0000%22>.
- 7 The Lowy Institute Poll is a nationally representative survey of Australian adults living in Australia. Overseas Australians would not have been included in the sample.
- 8 Natasha Kassam, 2019 Lowy Institute Poll, <https://poll.lowyinstitute.org/charts/budget-priorities>.
- 9 Stephen Dziedzic, “Federal Government to Ramp up Coronavirus Vaccine Diplomacy in the Pacific, South-East Asia”, 31 October 2020, <https://www.abc.net.au/news/2020-10-31/federal-government-to-ramp-up-pacific-vaccine-diplomacy/12834020>.
- 10 Alex Oliver, 2018 Lowy Institute Poll, 20 June 2018, <https://www.lowyinstitute.org/publications/2018-lowy-institute-poll>.
- 11 Scott Morrison, “Address to National Press Club”, 1 February 2021, <https://www.pm.gov.au/media/address-national-press-club-barton-act>.
- 12 Alex Oliver, 2016 Lowy Institute Poll, 20 June 2016, <https://www.lowyinstitute.org/publications/2016-lowy-institute-poll>.
- 13 Ibid.
- 14 Angus Taylor, “Advancing Australia’s Gas-fired Recovery”, 7 May 2021, <https://www.minister.industry.gov.au/ministers/taylor/media-releases/advancing-australias-gas-fired-recovery>.
- 15 See the Australian Radiation Protection and Nuclear Safety Act 1998 and the Environment Protection and Biodiversity Conservation Act 1999.

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