

An aerial, top-down view of a surfer riding a wave. The water is a vibrant blue with white foam from the breaking wave. The surfer is positioned in the lower right quadrant of the frame, wearing a red and black patterned wetsuit and yellow fins. The overall scene is dynamic and captures the power of the ocean.

LOWY INSTITUTE
Poll 2025

RYAN NEELAM

**UNDERSTANDING
AUSTRALIAN
ATTITUDES
TO THE WORLD**

Preface

Ten years ago, I was invited to deliver the ABC Boyer Lectures. I began my first lecture by recalling Dean Acheson's memoir about his time as President Harry Truman's secretary of state. Acheson belonged to the generation of American statesmen that created the post-war world. He called his memoir *Present at the Creation*.

In my lecture, I argued that we were 'present at the destruction' — the destruction of a world order that had served Australia's interests well.

In 2025, Acheson's creation is beset on all sides. This is a precarious moment, and Australians sense it. Feelings of safety and economic optimism have fallen to the lowest levels in two decades, equalling sentiment registered during the Covid-19 pandemic.

Australia's key ally, the United States, has changed course since President Donald Trump took office in January. Most Australians dislike what they see. Only 36% now trust the United States to act responsibly, a 20-point drop since last year and the lowest level on record.

Yet despite the sharp decline in trust, most Australians (80%) still believe the Australia-US alliance is important to our security — one of the most consistent findings in the history of the Institute's polling. A clear majority (63%) still believe that the United States would come to Australia's defence if it were attacked.

Perhaps one explanation for this apparent disjunction is the ongoing distrust of Australia's main trading partner, China, which many (69%) perceive as a future military threat. As if to illustrate that threat, just prior to the fieldwork for this Poll, a Chinese navy task force conducted live-fire drills in the Tasman Sea and then circumnavigated Australia. Only one in five Australians say they trust China to act responsibly. In 2018, before Beijing's campaign of attempted trade coercion, more than half of Australians trusted China.

How do Australians think we should respond to the changing world order?

Many believe we need to bolster our defence capabilities. Half the population say Australia should increase defence

spending, while support for acquiring nuclear-powered submarines under AUKUS has held firm (67%). Half the adult population also say they would be willing to fight to defend Australia if they were physically capable of doing so, while only a quarter say they would not.

Australians continue to stand against aggression, backing Ukraine in the fourth year of its war against Russia's illegal invasion. A strong majority (71%) also say they would support Australia's participation in a potential European-led peace-keeping mission. Sentiment towards Russia and Vladimir Putin remains frosty. And as authoritarianism grows in some parts of the world, a record high number of Australians (74%) see democracy as the best form of government. Meanwhile, a solid majority (70%) believe social media has more of a negative impact than a positive impact on democracy.

Most want Australia to be more economically self-sufficient: 83% think Australia should make more goods domestically, even if they cost more. Still, Australians have historically been steadfast believers in free trade, and reject President Trump's use of tariffs.

Australians lean towards cooperation. They feel most comfortable with fellow liberal democracies such as Japan and New Zealand, but remain circumspect towards two regional powers, India and Indonesia.

Urgency in addressing climate change has softened, as the cost of living bites at home. But Australians remain supportive of renewable energy and hosting a UN climate change conference in Australia.

Since this Poll went to the field, Australians have delivered a decisive election victory to incumbent Prime Minister Anthony Albanese. His government will need to chart the nation's course through a worsening geopolitical storm.

The Lowy Institute Poll, now in its twenty-first year, illuminates the public mood at a remarkable moment in history.

Dr Michael Fullilove AM
Executive Director
June 2025

Contents

Executive summary	4	Economy and trade	24
Global powers and world leaders	6	Economic optimism	24
Trust in global powers	6	Manufacturing in Australia	25
Confidence in world leaders	7	Climate change and energy	26
Feelings thermometer	8	Climate change	26
Relations in the Indo-Pacific	10	Net zero: economic opportunity or cost	27
United States	10	Australia's 2050 energy mix	27
China	13	Potential climate policies	28
Superpower relations	16	Foreign aid	30
Pacific Islands	18	Societal issues	31
Safety and threats	19	Democracy	31
Feelings of safety	19	Immigration	32
Threats to Australia	19	International students	33
Defence and security	21	Government performance and the 2025 election	34
Defence spending	21	Better foreign policy prime minister	34
AUKUS: Nuclear-powered submarines	21	Better at managing Trump and Xi	34
War in Ukraine: Australia's response	22	Better party by foreign policy issue	35
Willingness to defend Australia	23	About the Poll	36
		Methodology	36
		Acknowledgements	37
		Notes	38
		Figures	39
		About the author	40

Executive summary

Global powers and world leaders

With US President Donald Trump now in the White House, Australians' trust in the United States has fallen sharply. Only 36% of the public express any level of trust in America to act responsibly in the world, a 20-point drop since last year and the lowest level on record. The Lowy Institute's feelings thermometer registered a nine-degree drop in feelings of warmth towards the United States (50°), and President Trump began his term with only 25% of Australians expressing confidence in him to do the right things regarding world affairs — equal to his lowest first-term rating in 2019.

Despite incremental improvements since a nadir in 2022, overall, Australians remain wary of China. This year, only 20% say they have some level of trust in China, feelings towards the Asian superpower are again cool (37°), and confidence in Chinese President Xi Jinping continues to be low (16%).

Australians remain strongly positive towards like-minded liberal democracies. Trust in Japan has reached a record high of 90%, now topping this metric five years in a row. New Zealand again topped both the feelings thermometer (85°) and confidence in world leaders (63% confidence in Prime Minister Christopher Luxon), while the United Kingdom also performed well across indicators (85% trust, 75° warmth, 59% confidence in Prime Minister Keir Starmer).

Two important regional powers, Indonesia (58%) and India (54%), continue to elicit middling levels of trust. Confidence in their leaders, Prabowo Subianto (28%) and Narendra Modi (35%), remains relatively low (though many Australians had not heard of either).

Australians reserve the least trust for Russia (11%) out of eight countries, and the least confidence in North Korean leader Kim Jong-un (4%) of 13 world leaders.

United States

Despite the sharp drop in trust towards the United States, the vast majority of Australians (80%) continue to say the alliance is important to Australia's security. In addition, more than six in ten (63%) continue to think that the United States would come to Australia's defence if it were attacked, and more Australians say the country should remain close to the United States (57%) than those who think Australia should distance itself from its major ally (40%).

Nevertheless, most Australians (68%) are pessimistic about the next four years with Donald Trump as US president. A

majority disapprove of almost all of Mr Trump's policies that we tested, with the highest levels of disapproval directed at his attempts to acquire Greenland (89%), use of tariffs (81%), and withdrawal from the World Health Organization (76%) and climate agreements (74%). To a lesser extent, Australians disapprove of Mr Trump's cuts to US foreign aid (64%) and policy of mass deportations (56%). Australians are evenly split on Mr Trump's demand for US allies to spend more on defence.

China

Attitudes towards China improved incrementally, but caution remains. In 2025, Australians are almost evenly split on whether China is more an economic partner (50%) or security threat (47%). However, a clear majority (69%) continue to think it likely China will become a military threat to Australia in the next 20 years.

On policy issues, a majority say Australia should be doing more to pressure China on human rights (61%) and to deter it militarily (60%). About half think Australia should cooperate more with China on climate change (49%). Views on economic engagement are mixed — a plurality (43%) say Australia should be trading at about the same level as now, whereas about half (49%) say Australia should be attracting less investment from China.

Superpower relations

More than half of Australians (56%) believe China will be the most powerful country in ten years, while only around a quarter (27%) think the same of the United States. Similarly, more believe China (58%) will lead technologically in ten years compared to the United States (12%).

Regarding Australia's relationships with the superpowers, a bare majority continue to say the United States is more important to Australia (52%), while a lower proportion prioritise China (43%). Australians are evenly split on whether US President Donald Trump or Chinese President Xi Jinping is a more reliable partner for Australia.

Pacific Islands

Almost four in ten Australians see their own country as most influential in the Pacific Islands (39%), an eight-point increase since last year to overtake China (34%). Much of the increase in Australia's perceived influence appears to have come at the expense of the United States (18%), which dropped seven points, while China held steady.

Safety and threats

Australians' sense of safety has returned to a Covid-era historic low, with only 51% saying they feel either 'safe' or 'very safe'. On the key threats facing the nation, cyberattacks (65%) topped the list for the third year in a row, closely followed by a superpower conflict over Taiwan (61%). While Australians disapprove of US tariffs, only 29% see this as a critical threat to the nation.

Defence and security

As the geopolitical landscape rapidly shifts, half the population (51%) say Australia should increase defence spending, while a minority (37%) say spending should remain at about the same level as now. Majority support for acquiring nuclear-powered submarines has held firm (67%) since 2022.

Public support for assisting Ukraine remains very high, and a clear majority of Australians (71%) say they would support participating in a European-led peacekeeping mission in Ukraine. If Australia were attacked by another country, half the adult population (52%) say they would be willing to fight to defend Australia, while a quarter (24%) would not.

Economy and trade

Only half of Australians (52%) say they feel any level of optimism about Australia's economic performance over the next five years, equalling a Covid-era low in 2020. This reading was taken in March, after Donald Trump had imposed or threatened tariffs on several countries, but prior to his sweeping 2 April 'Liberation Day' tariffs.

In the context of a number of governments, including Australia's, implementing green industrial policies, the vast majority of Australians (83%) think the country should make more goods in Australia, even if they cost more. Only 16% of the population say Australia should source all goods from wherever they cost less.

Climate and energy

In 2025, half of the public (51%) say 'global warming is a serious and pressing problem' about which 'we should begin taking steps now, even if this involves significant costs' — a drop of six points. Australians are roughly split on whether achieving the net zero target would leave the economy better (38%) or worse off (36%).

On Australia's future energy mix, three-quarters of the adult population (75%) say renewables should play a major role by 2050. As for gas, more than half the population (51%) say it should play a minor role. On coal, the largest share of the population believe it should play a minor role (44%), while almost one-third (31%) say it should have no role at all by 2050.

Regarding nuclear energy, which is not currently part of Australia's energy mix, two-thirds (66%) see it playing some role in generation by 2050 — 37% say it should be a major role, while 29% say minor. About one-third (32%) say nuclear should play no role at all.

On policies, Australians are in majority support of subsidising renewables (82%), reducing gas exports (71%), hosting a UN climate summit (70%), and increasing the use of gas in energy generation (65%). More than half support introducing an emissions trading scheme or a carbon tax (56%), and a slim majority back banning new coal mines (54%).

Foreign aid

Two-thirds of Australians (66%) say the current aid budget is either 'about right' (49%) or 'too low' (17%), while one-third say it is 'too high' (33%). This is a significant 11-point increase since 2017 for those who say the aid budget is 'about right'.

Democracy

Three-quarters of Australians (74%) say democracy is preferable to any other kind of government, equalling a record high in 2022. However, this preference for democracy is consistently lower among younger Australians. Of the 15% of respondents who say 'in some circumstances, a non-democratic government can be preferable', Singapore is most frequently mentioned as coming closest to their ideal. Meanwhile, seven in ten Australians (70%) think social media has a more negative than positive impact on democracy, while only 21% say it is more positive.

Immigration

More than half the population (53%) say the total number of migrants coming to Australia each year is 'too high', a five-point increase since last year. Less than half (45%) think immigration is either 'about right' (38%) or 'too low' (7%). When it comes to international students, more than half of the population (56%) say the number of international students enrolled at Australian universities is either 'about right' (49%) or 'too low' (7%). Four in ten (42%) say the student intake is 'too high'.

Government performance and 2025 election

In early March, prior to the May 2025 federal election, incumbent Prime Minister Anthony Albanese (41%) led then Opposition leader Peter Dutton (29%) by 12 points in terms of who Australians thought would be more competent at handling Australia's foreign policy. Australians were almost evenly split on whether Peter Dutton (35%) or Anthony Albanese (34%) would be better at managing Australia's relationship with the United States and Donald Trump, while Mr Albanese (45%) enjoyed a 20-point lead over Mr Dutton (25%) on managing the relationship with China and Xi Jinping.

On foreign policy-related issues, Labor was favoured most clearly over the Liberal–National Coalition on human rights (25-point lead) and climate change (21-point lead), and to a lesser extent on responding to the Russia–Ukraine war (eight-point lead) and the Israel– Hamas conflict (four-point lead). By contrast, the Coalition was preferred on maintaining a capable defence force (six-point lead). Responses were more evenly divided on managing immigration (two-point lead for the Coalition) and the economy (two-point lead for Labor).

The 2025 Lowy Institute Poll reports the results of a nationally representative survey of 2117 adult Australian residents, conducted between 3 and 16 March by the Social Research Centre. The margin of error is approximately 2.1%. See Methodology (page 36) for full details.

Explore the data at poll.lowyinstitute.org

Global powers and world leaders

Trust in global powers

Since US President Donald Trump was inaugurated in January, he has upended longstanding assumptions about the United States' power and place in the world, its involvement in global institutions, and its approach to its allies and partners.

In this context, Australians' trust in the United States to act responsibly in the world fell by 20 points, with only 36% of the public expressing any level of trust — a new low in two decades of Lowy Institute polling. Correspondingly, almost two-thirds of the public (64%) say they hold 'not very much' trust (32%) or no trust 'at all' (32%) in the United States to act responsibly.

On this question, trust towards the United States among older Australians fell dramatically (by 30 points for those aged 45 and over) while trust among younger Australians was already relatively low and fell by a smaller margin (by ten points for those aged 18 to 44).

Trust in China continued to improve incrementally, rising three points to 20%. In 2022, trust in China reached a record low of 12%. Since then, it has risen marginally each year. Despite this modest recovery, trust in China in 2025 remains relatively low compared to historic levels up until 2018, when 52% said they trusted China to act responsibly. Russia remains the least trusted country on this measure at 11% — a marginal improvement of three points.

Japan has reached a record high of 90%, topping this list five years in a row. The vast majority of Australians also continue to trust the United Kingdom (85%), climbing five points since last year, while France remained steady at 80%.

Indonesia (58%) rose six points, while India remained steady (54%), both countries continuing to elicit middling levels of trust.

FIGURE 1

Trust in the United States

How much do you trust the United States to act responsibly in the world?

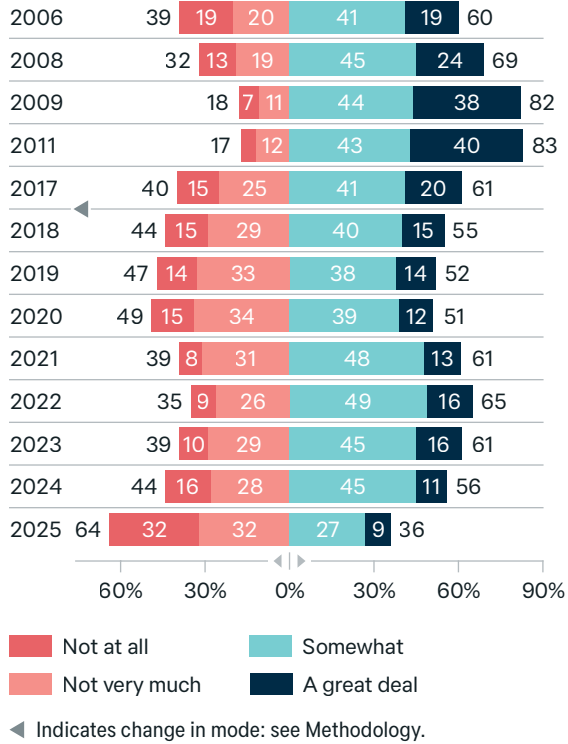
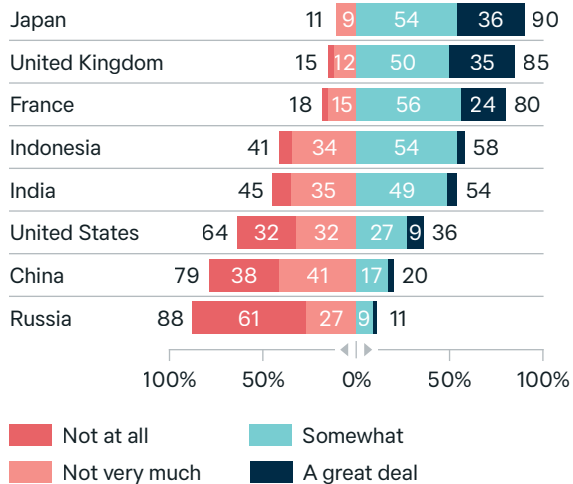


FIGURE 2

Trust in global powers

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



Confidence in world leaders

Donald Trump was re-elected as US president and commenced his second term in January. In line with low levels of trust in the United States, only 25% of Australians say they have ‘a lot’ of or ‘some’ confidence in Donald Trump to do the right thing in world affairs. This equals Trump’s lowest reading in 2019, during his first term.

Confidence in Chinese President Xi Jinping (16%) has risen by four points, accompanying the slow moderation of distrust in China (page 6). Once again, North Korean leader Kim Jong-un (4%) garners the least confidence from Australians, while Russian President Vladimir Putin follows closely behind (8%).

Indonesia’s new president, Prabowo Subianto (28%), commenced his term five points below his predecessor, Joko Widodo, while Indian Prime Minister Narendra Modi (35%) remained steady on last year.

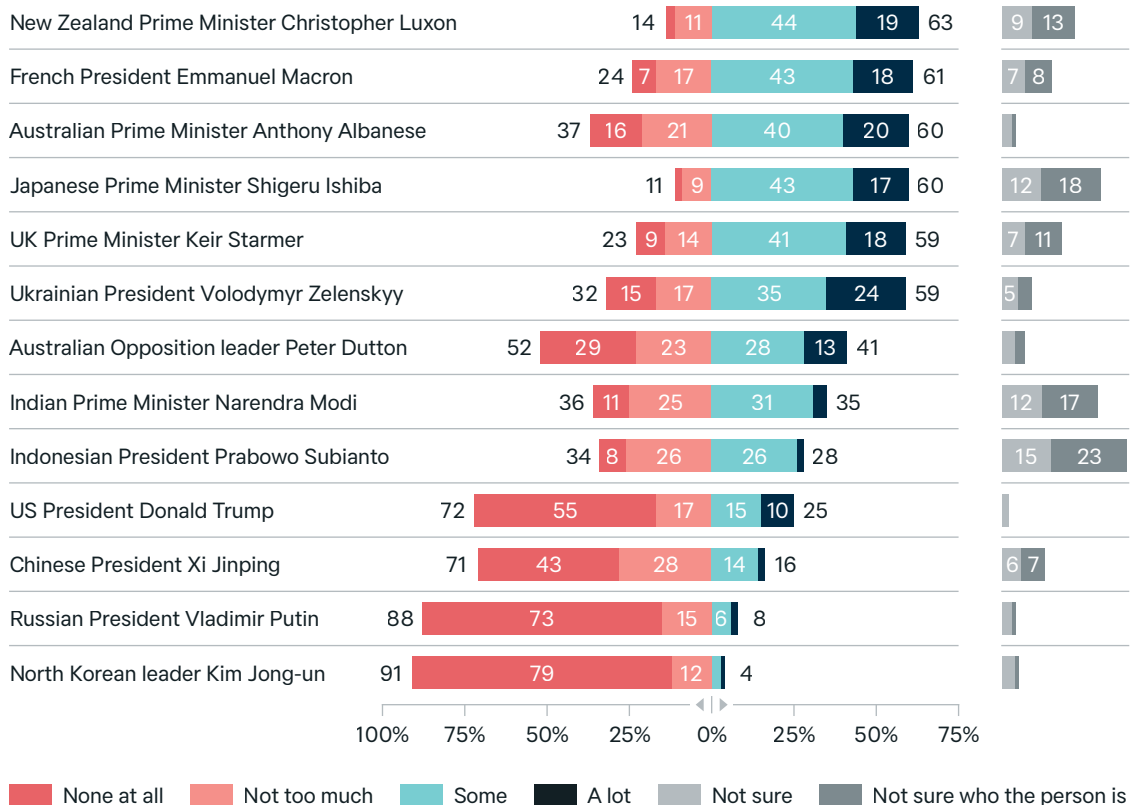
New Zealand is now led by Prime Minister Christopher Luxon (63%) who, like his two predecessors, elicits the most confidence from Australians of any leader on this list. In fact, Australians had more confidence in Mr Luxon than in either Prime Minister Anthony Albanese (60%) or then Opposition leader Peter Dutton (41%) prior to the federal election.

French President Emmanuel Macron also garners strong confidence (61%), as does Japanese Prime Minister Shigeru Ishiba (60%).

FIGURE 3

Confidence in world leaders

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



Feelings thermometer

The Lowy Institute ‘feelings thermometer’ measures Australians’ warmth towards other countries and territories on a scale of 0° (coldest feelings) to 100° (warmest feelings), with each score reflecting the mean of responses.

New Zealand has topped the feelings thermometer again at a very warm 85° in 2025, a position it has held in all of the 15 years it has been included. Australians continue to feel very warmly towards Japan (76°), the United Kingdom (75°), and Singapore (72°), and warmly towards Germany (68°), South Korea, and Taiwan (both at 63°) — all steady on their previous readings. Australians remain relatively warm towards Ukraine (61°).

Feelings remain steady towards Indonesia (56°), and are lukewarm towards South Africa (52°), and are lukewarm towards South Africa (52°, down seven degrees since its last reading in 2010) and India (51°), down three degrees from last year.

The largest shift this year, however, was a nine-degree drop in warmth towards the United States (50°), accompanying the sharp decline in trust towards the country (page 6). This continues a cooling towards the United States since 2022 (65°), and is in stark contrast to its warmest reading on the thermometer in 2015 (73°).

Meanwhile, cool feelings towards China (37°) thawed by three degrees from last year, a small improvement from a low of 32° four years ago, which was registered during China’s diplomatic rupture with Australia. Before 2019, China consistently registered above 50° on the feelings thermometer.

Australian attitudes towards Iran (27°) and Russia (22°) remain frosty, while Australians reserve their iciest feelings for North Korea (16°).

FIGURE 4

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.

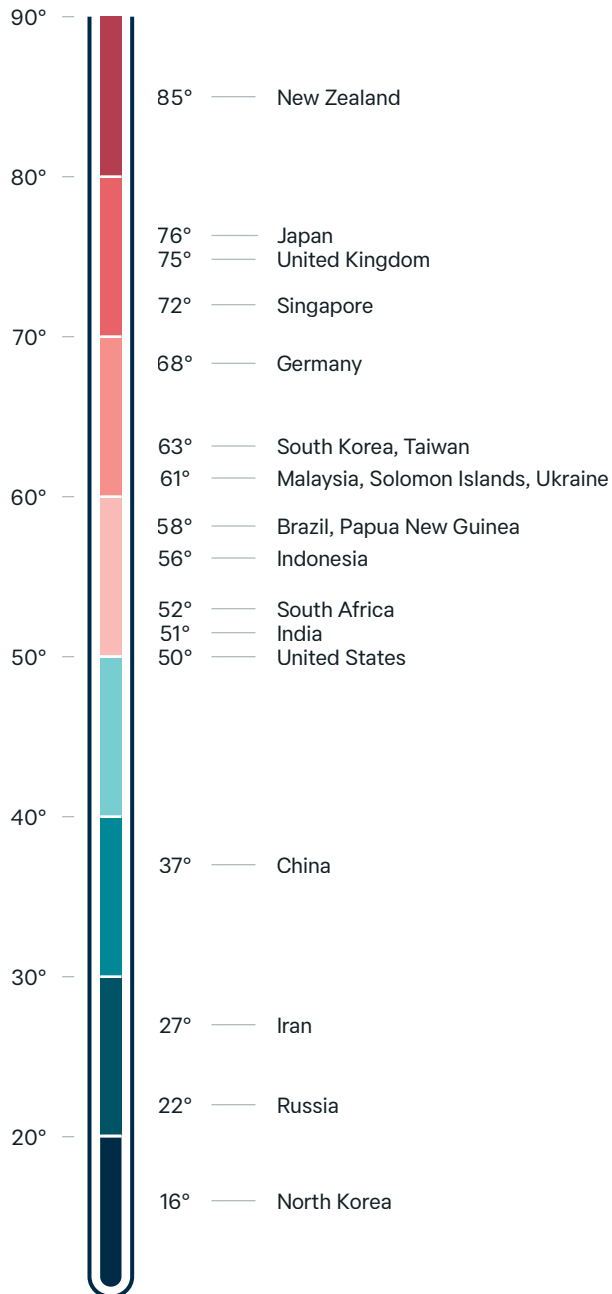
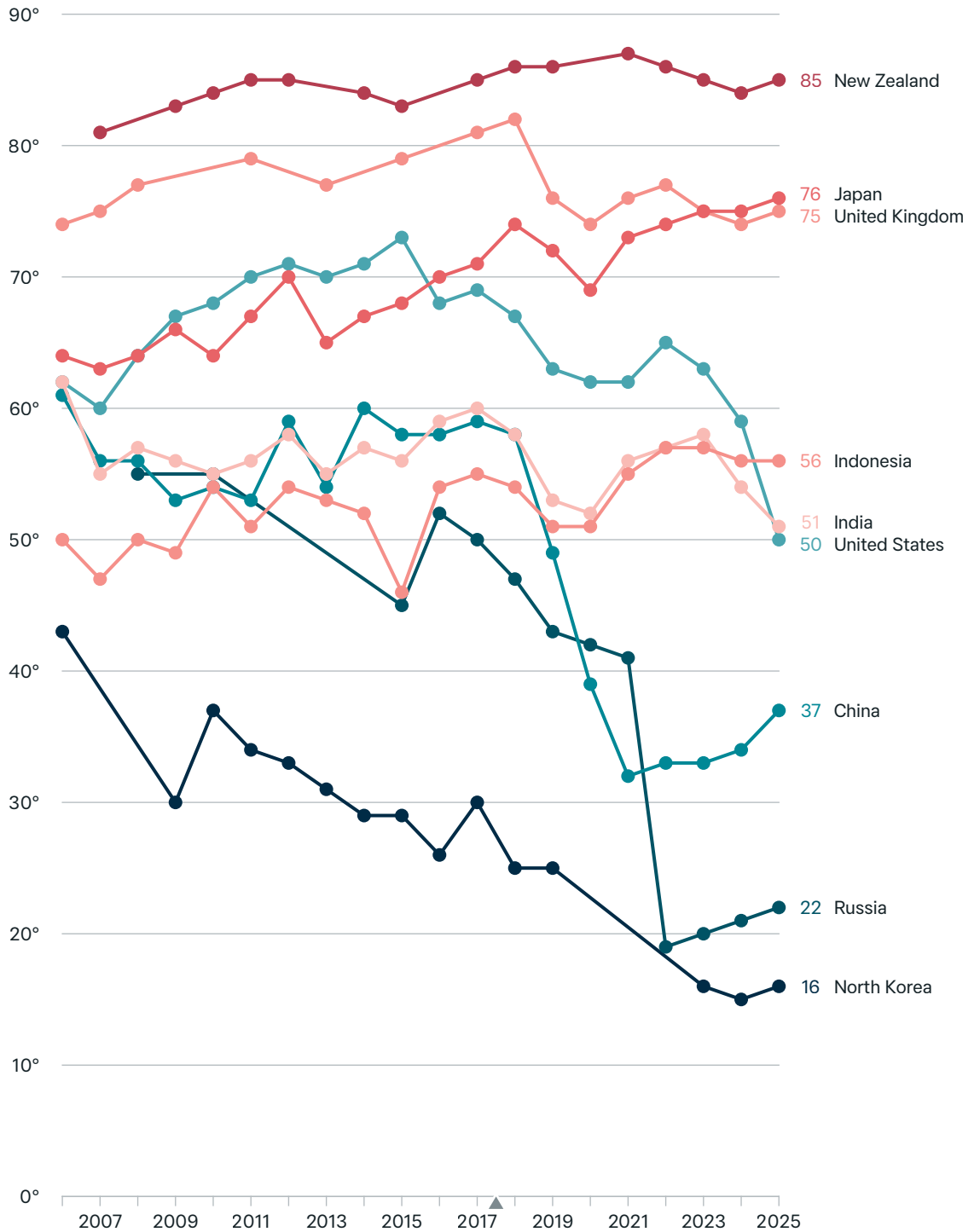


FIGURE 5

Feelings thermometer — select historical responses



▲ Indicates change in mode: see Methodology.

Relations in the Indo-Pacific

United States

When this Poll went to field in early March, US President Donald Trump, who was only six weeks into his term, had already signed more than 80 executive orders¹ aimed at implementing his ‘America First’ agenda, repealed a range of his predecessor Joe Biden’s policies, and cast doubt on America’s commitment to alliances and international norms.

This included imposing or threatening tariffs on allies and competitors alike, calling for the annexation or acquisition of foreign countries and territories, and withdrawing from international agreements on health and climate change. President Trump was also pursuing efforts to bring an end to the war in Ukraine, but had labelled Ukrainian President Volodymyr Zelenskyy a ‘dictator’, voted with Russia and against European allies on UN resolutions on Ukraine, and harshly admonished the Ukrainian leader in a widely televised Oval Office encounter.

US alliance: importance

Despite the significant 20-point drop in trust towards the United States (page 6) this year, Australia’s alliance with the United States, known as ANZUS, continues to garner widespread support among Australians. Eight in ten (80%) continue to say the alliance is ‘very’ or ‘fairly’ important for Australia’s security, steady on last year (83%).

This majority view of the importance of the alliance to Australia has been one of the most resilient features of Lowy Institute polling. It has largely withstood leadership changes and political swings in the United States, holding at a strong majority throughout Donald Trump’s first term.

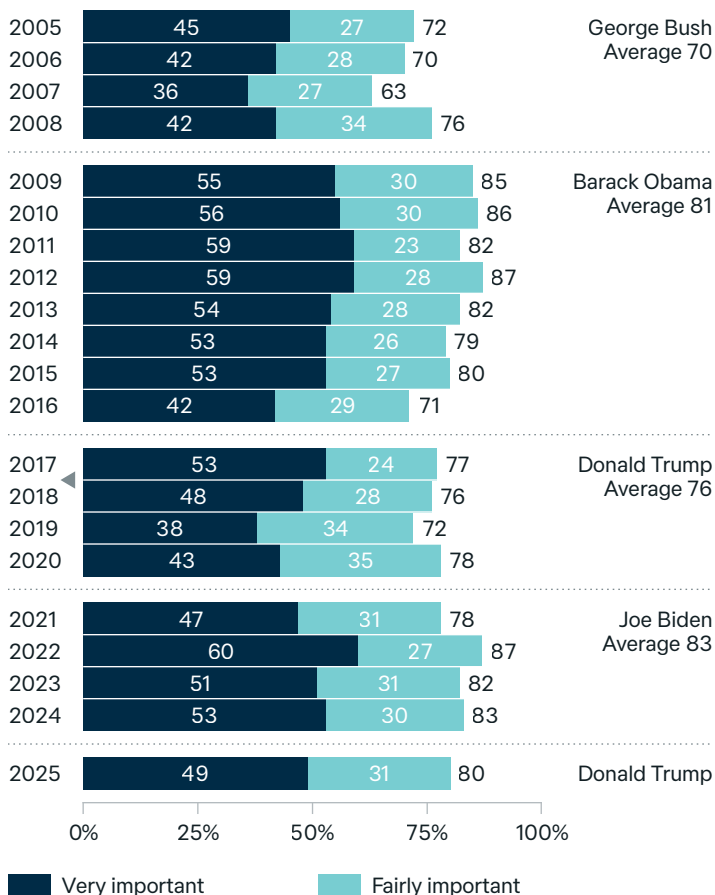
Nevertheless, on average over the past two decades, Australians have placed more importance in the alliance during the terms of Democratic presidents (Obama and Biden) than Republican presidents (Bush and Trump), when support for

the alliance waned. It is too early to tell if this pattern will be repeated during Trump’s second term. To date, the lowest ebb of support for the alliance was in 2007, during President George Bush’s war on Iraq. Even then, almost two-thirds (63%) of Australians said the alliance was important to the country’s security.

FIGURE 6

US alliance: importance to Australia’s security

Thinking now about the United States. How important is our relationship with the United States for Australia’s security?



◀ Indicates change in mode: see Methodology.

US alliance: defence of Australia

At the core of the ANZUS alliance is a commitment by Australia and the United States to consult each other in the event of a threat or armed attack on either party, and to ‘act to meet the common danger in accordance with ... constitutional processes’.²

Donald Trump has brought new urgency to the debate about whether the United States would come to Australia’s defence should Australia be attacked. Trump’s antipathy towards alliances, and his remarks that he would not defend European allies that do not spend enough on defence (in apparent rejection of NATO’s collective defence obligation),³ have cast doubt on whether he might also step back from mutual defence commitments with other allies.

However, a clear majority of Australians (63%) continue to think that the United States would come to Australia’s defence if it were attacked. Only one-third (33%) think the United States would not defend Australia.

In previous years, in response to a similar question, a significantly higher proportion of Australians (about three-quarters in 2019, 2021, and 2022) agreed with the statement ‘the United States would come to Australia’s defence if Australia was under threat’.

Optimism about Donald Trump

When it comes to the second presidency of Donald Trump, few Australians are upbeat. Approximately two-thirds (68%) say they are pessimistic about the next four years with Trump as US president, while three in ten (30%) say they are optimistic.

This contrasts sharply with American responses to the same question in a CBS survey in the United States, fielded just before President Trump’s inauguration. Then, 60% of Americans said they were optimistic about the next four years with Trump as president, compared to 40% who were pessimistic.⁴ Subsequently, a range of other polls in the United States have shown growing disapproval of President Trump’s performance and of many of his policies over his first 100 days in office.⁵

FIGURE 7

United States’ defence of Australia

Do you think the United States would or would not come to Australia’s defence if Australia were attacked by the military of another country?

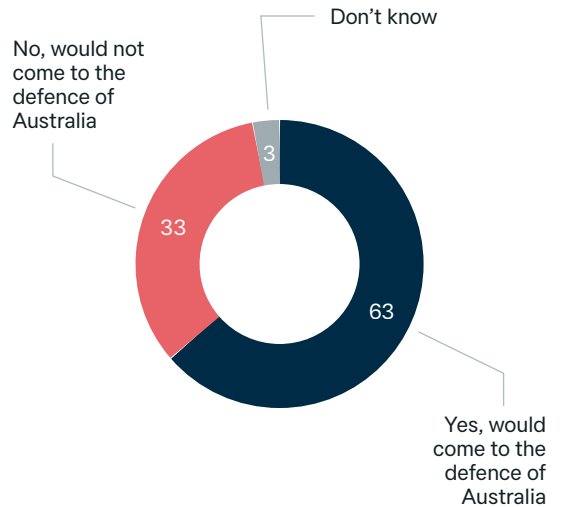
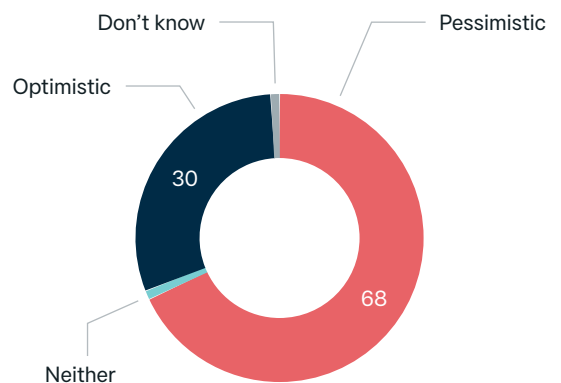


FIGURE 8

Donald Trump: optimism

Now thinking about the presidency of Donald Trump. Are you generally optimistic or pessimistic about the next four years with Donald Trump as US president?



Australia and the United States under President Trump

In keeping with the ongoing sense of importance placed on the Australia–US alliance, the majority of Australians (57%) say that Australia should remain close to the United States under President Donald Trump. However, this is down seven points from 2018, the last time we asked this question (during Trump’s first presidential term). Four in ten (40%) say Australia should distance itself from the United States, an increase of nine points since 2018.

Policies of President Trump

Regarding Donald Trump’s specific policies, every one of them we tested received clear majority disapproval from the Australian public, with the exception of his demand for allies to spend more on defence (evenly split at 49% approve and disapprove).

Australians are most disapproving of President Trump’s pressure on Denmark to sell or hand over the self-governing territory of Greenland to the United States (89%). President Trump has repeatedly refused to rule out using force to pursue this objective.⁶

Eight in ten Australians also disapprove of Donald Trump’s use of tariffs to pressure other countries to comply with his administration’s objectives (81%). At the time of fieldwork, President Trump had announced plans for 25% tariffs on steel and aluminium imports to the United States, including from Australia, as well as announced or threatened tariffs against China, Canada, Mexico, and several other countries. He had not yet announced his 2 April ‘Liberation Day’ tranche of tariffs on countries around the world.

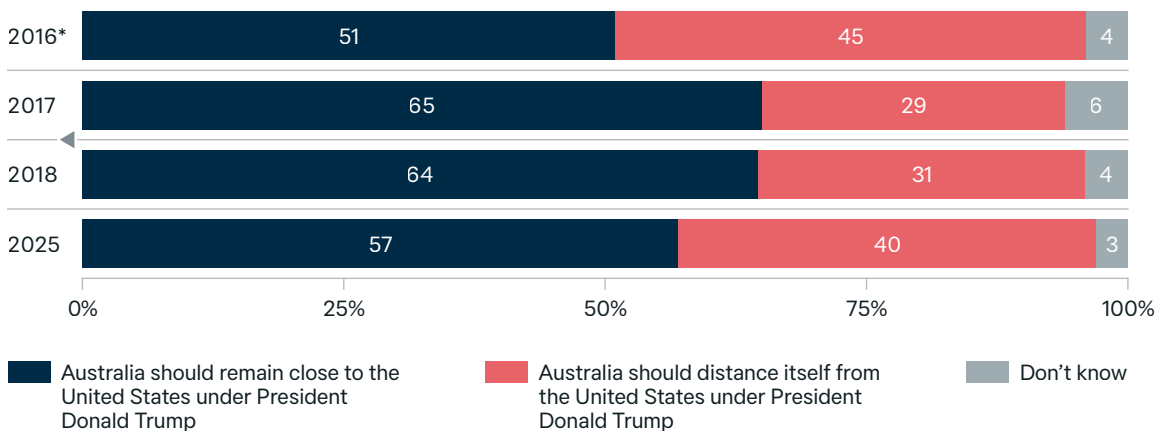
Three-quarters of Australians disapprove of US withdrawal from the World Health Organization (76%) and international climate change agreements (74%). A similar majority of Australians disapprove (74%) of President Trump negotiating a deal on the future of Ukraine with Russian President Putin, whereby Ukraine may be asked to accept a loss of territory. President Trump’s combative Oval Office meeting with Ukraine’s President Volodymyr Zelenskyy took place just before fieldwork for this Poll.

To a lesser extent, Australians disapprove of significantly reducing US spending on foreign aid (64%), and mass deportations of undocumented migrants (56%).

FIGURE 9

Australia and the United States under President Trump

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



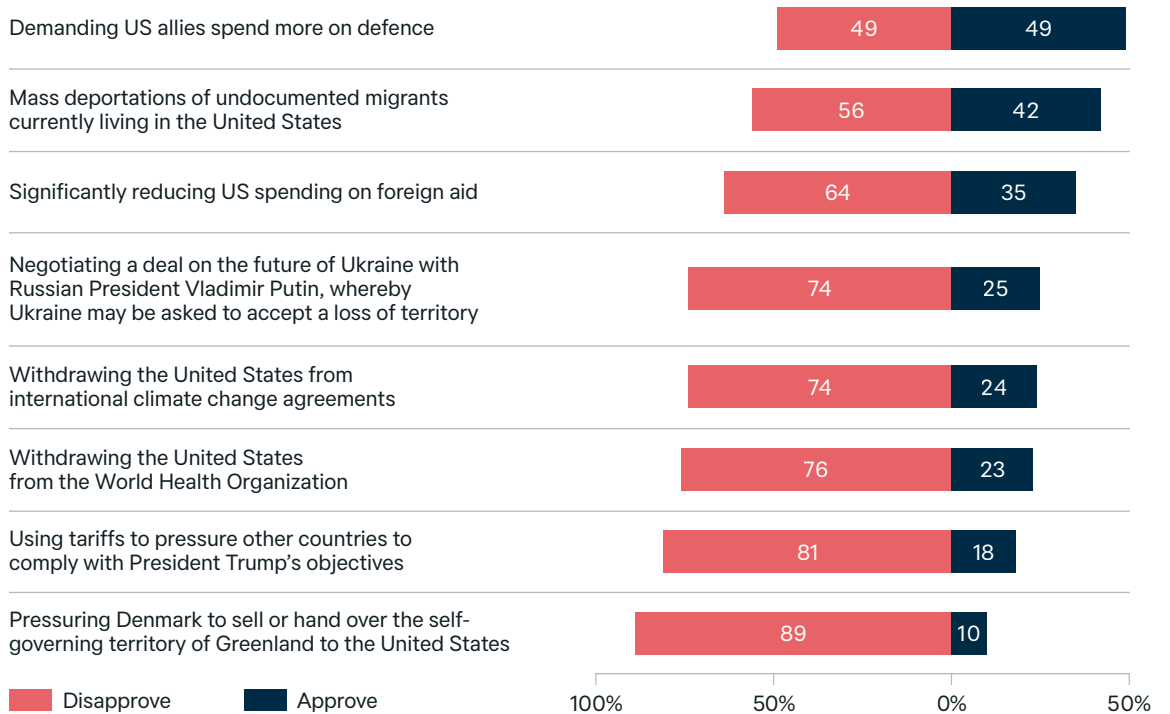
* In 2016, this question was fielded before the US election. Responses available were ‘Australia should remain close to the United States regardless of who is elected US President’ and ‘Australia should distance itself from the United States if it elects a president like Donald Trump’.

◀ Indicates change in mode: see Methodology.

FIGURE 10

Policies of President Trump

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



China

In the past decade, Australian attitudes towards China have undergone a dramatic shift. Beginning in 2019, Australians’ trust in China began to drop significantly, while threat perceptions rose sharply. This occurred as Canberra took more forthright positions on China’s alleged political interference in Australia, human rights abuses, regional military buildup, and on the origins of the Covid pandemic. China responded by freezing high-level contact and by blocking some \$20 billion worth of Australian exports.

The 2022 election of the Albanese Labor government in Australia provided an opportunity for both sides to reframe their engagement. China reopened high-level contact, progressively rolled back its trade blockages, and released Australian journalist Cheng Lei, who had been detained in China, while Canberra talked of ‘stabilising’ the relationship.

However, in late February 2025, shortly before fieldwork for this Poll commenced, a Chinese navy task force conducted live-fire drills in the Tasman Sea, close enough to commercial aircraft traffic routes to prompt planes to divert from the area. The task force then proceeded to circumnavigate continental Australia, completing its circuit as this Poll went to field in early March.

Public perceptions of China have improved incrementally from a nadir in 2022, but overall, Australians remain wary of their major trading partner – trust, warmth, and confidence in China and its leader are historically low (pages 6–9), while threat perceptions remain high (pages 14–15).

China: economic partner or security threat

This year, Australians are almost evenly split on whether China is more an economic partner (50%) or a security threat (47%). This represents a rise of six points among those who see China as more of an economic partner, and a fall of six points among those who see it as more of a security threat.

RELATIONS IN THE INDO-PACIFIC

Public sentiment on this question appears to roughly shadow the course of official Australia–China relations: after 2020, majority economic optimism gave way to more pronounced threat perceptions as diplomatic relations soured. Then, from 2023 onwards, as the official relationship thawed, threat perceptions mellowed slightly and public attitudes on this question became more evenly divided.

China as a military threat

When looking to the future, a strong majority of Australians (69%) continue to think it ‘somewhat likely’ or ‘very likely’ that China will become a military threat to Australia in the next 20 years. This is roughly steady from last year, and stands in marked contrast to 2018, when less than half (45%) perceived China as a future military threat.

China: Australian policy settings

In recent years, the Australian government has sought to deter and balance China’s growing military might in partnership with allies, for example through the Australia–United Kingdom–United States (AUKUS) partnership on nuclear-powered submarines (page 21). At the same time, it has

continued to engage with China as its top trading partner and a major global power.

How does the Australian public judge this balance? We asked respondents to say whether Australia should be doing more, less, or about the same on a range of key issues in the relationship.

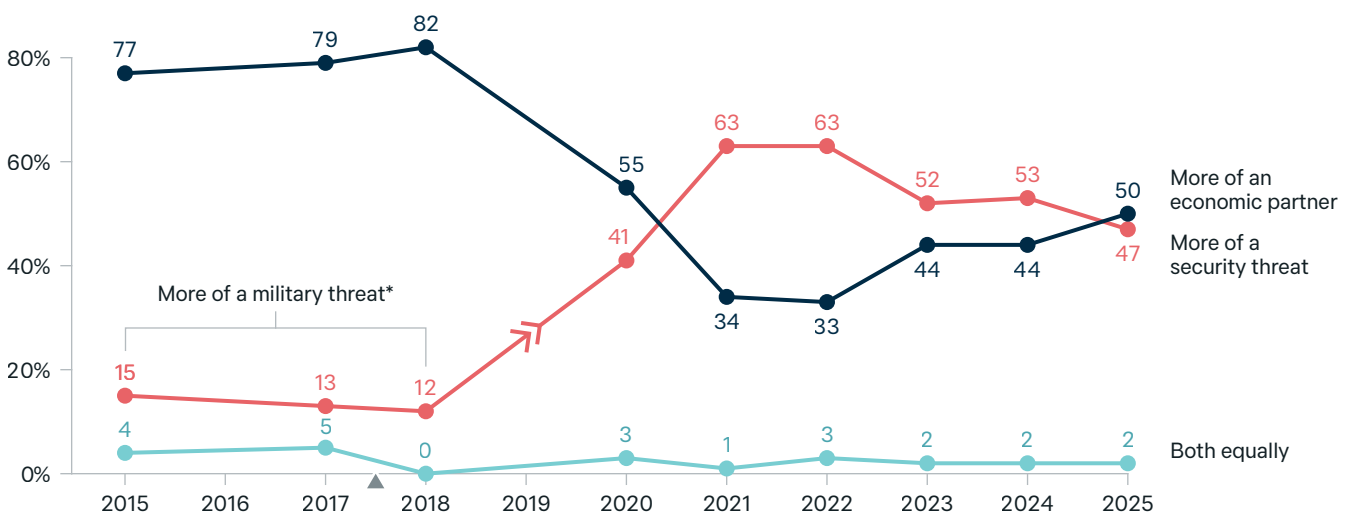
A clear majority of Australians say Australia should be doing more to pressure China to improve human rights (61%), as well as working more with allies to deter China’s use of military force (60%). About half think Australia should be doing more with China to address climate change (49%).

Views on economic engagement with China are far more mixed. On trade, the largest proportion (43%) say Australia should be doing about the same as it is now, while the remainder are roughly split between those who say we should be trading more (30%) or less (26%) with China. On foreign investment, about half of Australians (49%) say we should be attracting less investment from China, while the other half say we should be attracting about the same (28%) or more (22%).

FIGURE 11

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?



* In 2015, 2017, and 2018, the question asked if China was ‘more of a military threat’.

▲ Indicates change in mode: see Methodology.

FIGURE 12

China as a military threat

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

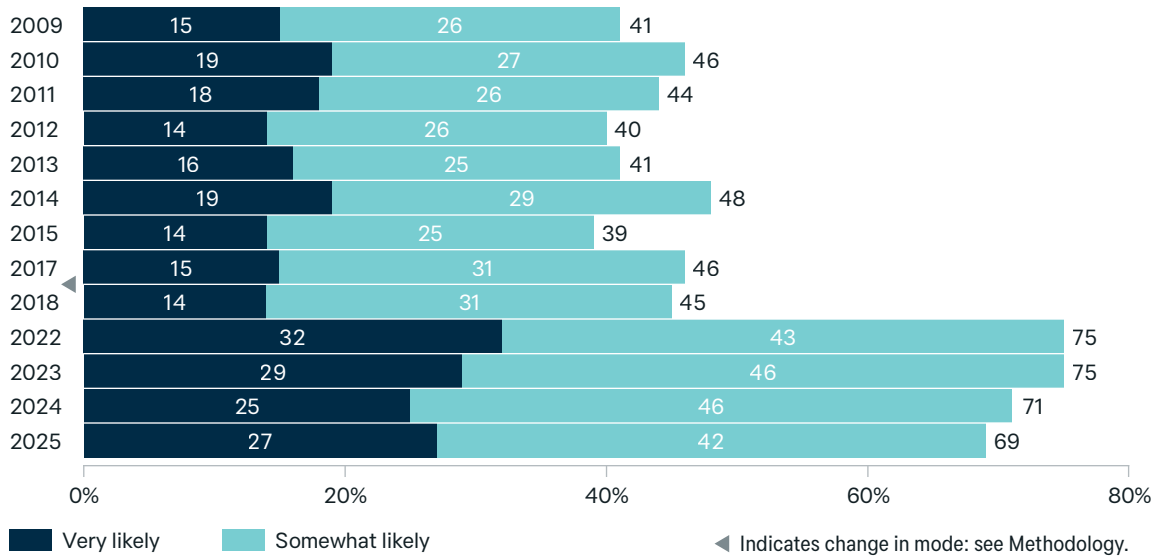
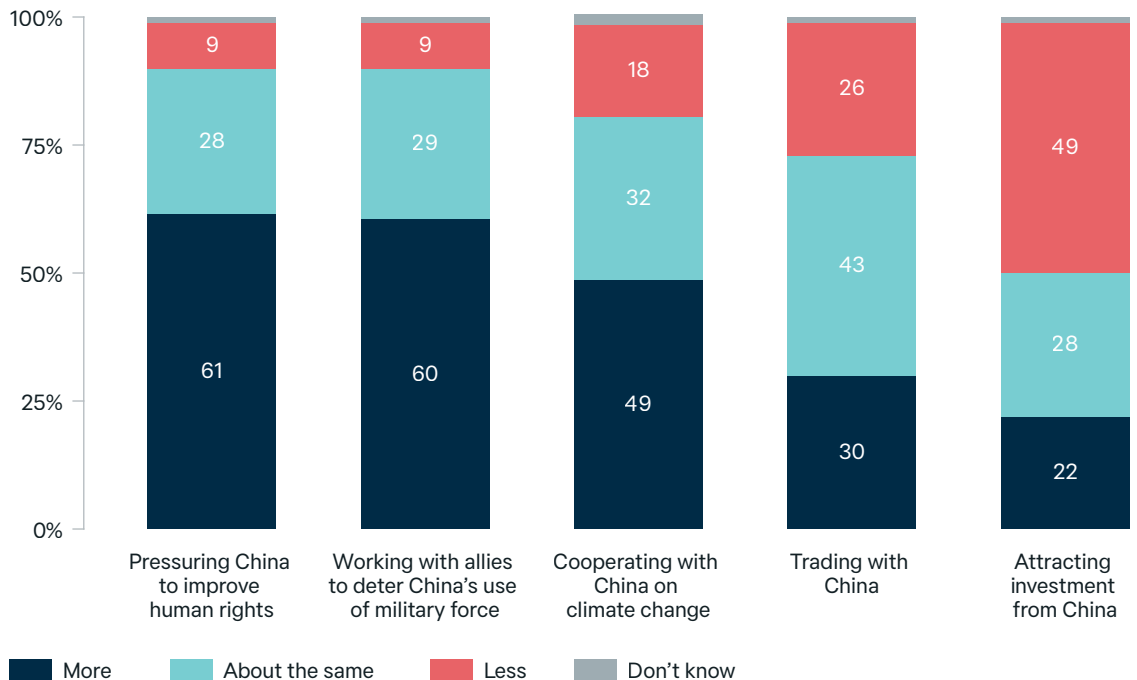


FIGURE 13

China: Australian policy settings

For each of the following, please indicate whether you think Australia should be doing more, less, or about the same as now:



Superpower relations

Superpowers in the future

With competition between the United States and China intensifying, more than half of the Australian public (56%) believe China will be the most important and powerful country in the world in ten years. By contrast, just over one-quarter (27%) think the United States will be the most powerful country.

US Secretary of State Marco Rubio has said that US global hegemony was a post-Cold War anomaly, and that the world was moving towards a more multipolar state with ‘multi-great powers in different parts of the planet’.⁷

Regarding other existing or possible emerging great powers, a small minority of Australians (9%) believe Europe will be the most important and powerful region in the world, and very few (5%) think India will predominate.

US–China technological competition

A central dimension of US–China competition is the contest over innovation, production, and deployment of the most critical advanced technologies, including artificial intelligence, quantum computing, and semiconductors.

The United States has long dominated innovation in and production of many advanced technologies and has put in place a range of export controls and measures to impede China’s ability to catch up, including in its manufacture of advanced semiconductor chips. But in January, Chinese artificial intelligence lab DeepSeek stunned markets with an AI model that performed on par with global technology leaders, yet was apparently trained at much lower cost.⁸

Almost six in ten Australians (58%) think that ten years from now, China will be more advanced at developing and using the world’s most important technologies. Only 12% say the same of the United States, while almost three in ten (29%) think China and the United States will be at the same level of technological advancement.

Australia’s relations with the superpowers

Australia’s relationships with the United States and China are among its most important. The

FIGURE 14

Superpowers in the future

Now a question about the role and influence of countries in the future. Ten years from now, which of these countries or regions do you think will be the most important and powerful in the world?

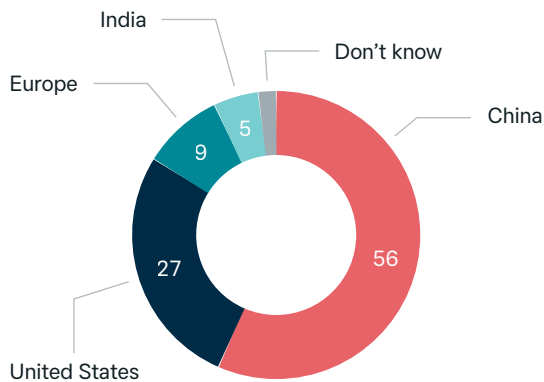
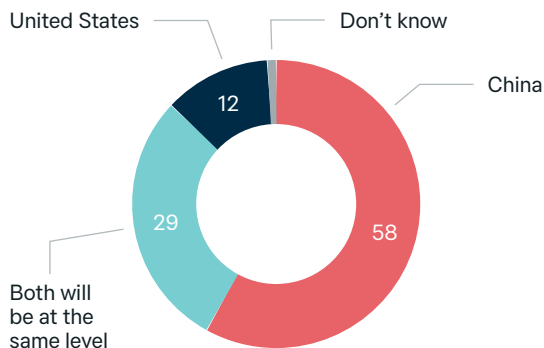


FIGURE 15

US–China technological competition

Next, thinking about technological innovation. Ten years from now, which of these countries do you think will be more advanced at developing and using the world’s most important technologies?

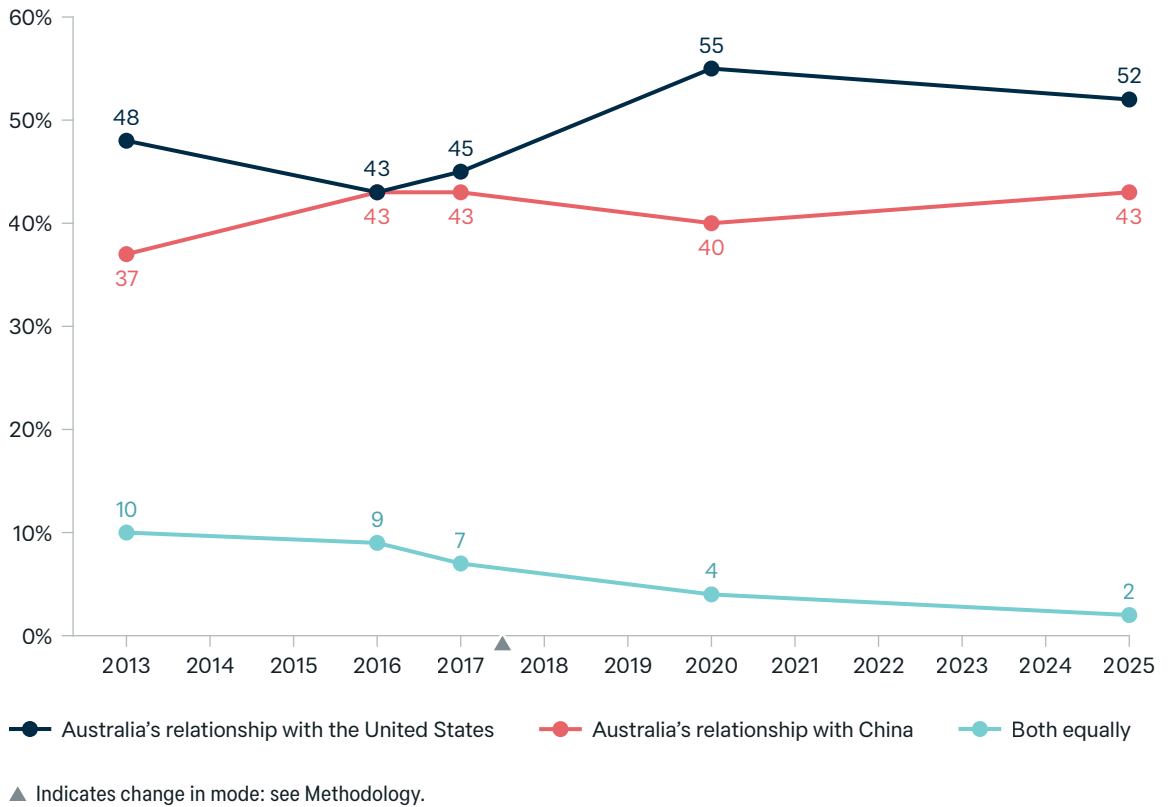


United States is Australia’s main ally and its largest foreign investor, while China is the country’s largest trading partner by some margin. Yet both relationships have been the subject of intense debate in recent years: many are wary of the security threat posed by China’s growing military and technological capabilities, whereas President Trump has made the United States more unpredictable and transactional.

FIGURE 16

Relations with superpowers: United States and China

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



When asked which relationship is *more* important to Australia, a bare majority continue to prioritise the United States (52%), while a lower proportion prioritise China (43%). Sentiment on this question is largely unchanged from the last time it was asked five years ago, which is notable given the significant geopolitical shifts since 2020. The gap between the superpowers currently stands at nine points in America’s favour, where almost a decade ago they were tied.

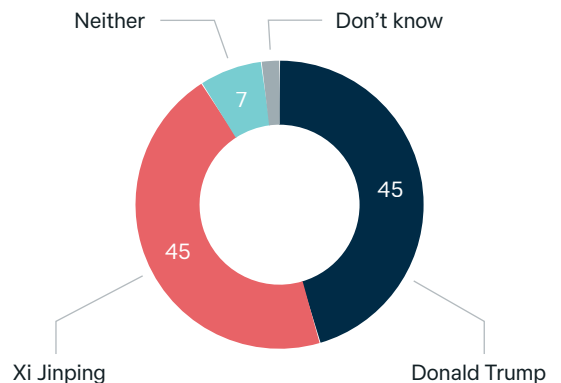
More reliable partner — Xi or Trump

On the question of whether Chinese President Xi Jinping or US President Donald Trump is a more reliable partner for Australia, respondents are evenly split (45% each). Almost one in ten (9%) say ‘neither’ or that they don’t know.

FIGURE 17

More reliable partner: Xi or Trump

Which leader, US President Donald Trump or Chinese President Xi Jinping, do you think is a more reliable partner for Australia?



Pacific Islands

Influence in the Pacific Islands

Over the past decade, both China and the United States have sought to strengthen their security, diplomatic, and development footprints to increase their influence in the strategically important Pacific Islands region.

However, Donald Trump’s election has cast uncertainty over the United States’ future involvement in the region. China, meanwhile, continues to try to expand its presence, including by inducing countries to formally recognise it instead of Taiwan — Nauru was the latest country to switch recognition to China in 2024 — or by seeking deals allowing military or security service access to Pacific Island countries.

Australia and New Zealand — both members of the Pacific Islands Forum — have ramped up their engagement with the Pacific over many years.

Australia remains the single largest aid donor to the Pacific by a considerable margin,⁹ and is the only country to have a diplomatic mission in every Pacific Islands capital.¹⁰ In recent years, Australia has agreed a number of deals with Pacific countries that combine aid support with provisions to ensure Australia is consulted on security matters.

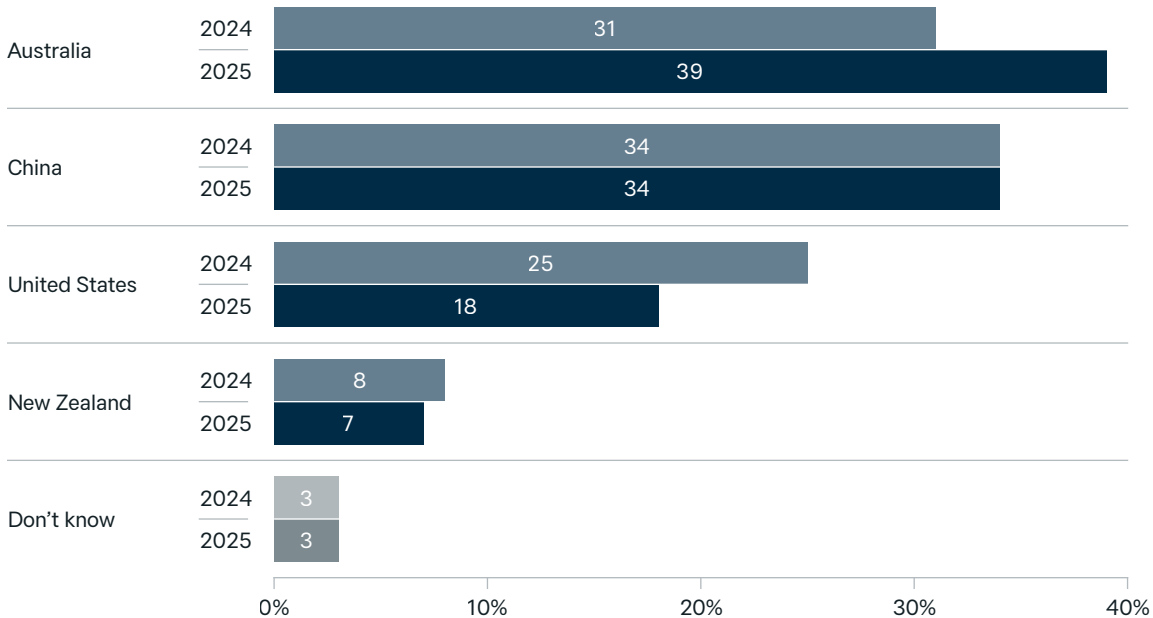
In 2025, four in ten Australians (39%) say their own country has the most influence in the Pacific Islands, surpassing the one-third who think China (34%) wields the most influence in the region. Only 18% selected the United States, and 7% New Zealand.

Last year, when Australians were asked the same question, China topped this metric. But Australia has since gained eight points, overtaking China, which remained steady. Meanwhile, the United States has dropped seven points.

FIGURE 18

Influence in Pacific Island countries

Now thinking about the Pacific Islands region. In your opinion, which one of these countries has the most influence in Pacific Island countries?



Safety and threats

Feelings of safety

Australians' sense of safety has returned to a Covid-era historic low, with only 51% saying they feel either 'safe' or 'very safe' in relation to world events. This roughly equals the reading in 2020, when the Covid pandemic swept the world and feelings of safety plummeted to a record low. The proportion who say they feel 'very safe' this year remains extremely low, at 5%.

This is a striking contrast to the high watermark of 2010 (92% overall levels of safety), when four in ten Australians said they felt 'very safe'.

Threats to Australia

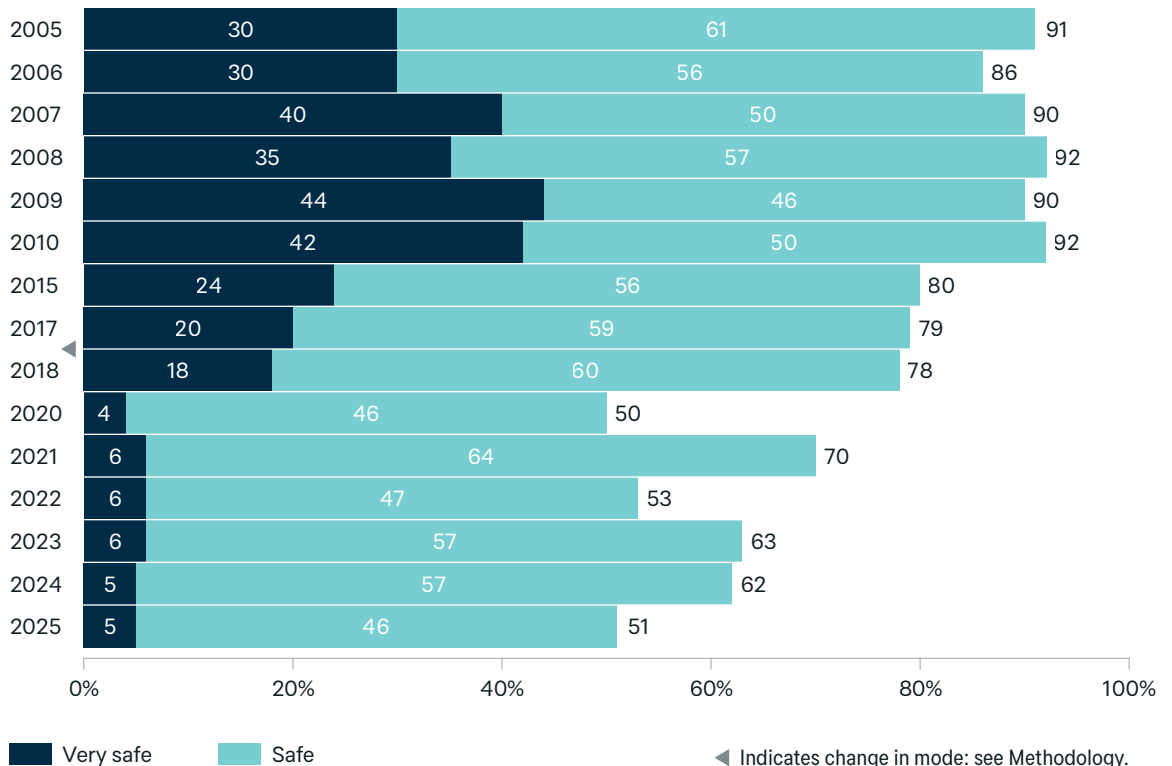
For the third year in a row, cyberattacks from other countries is the leading threat to Australia, according to respondents asked about a range of possible 'threats to the vital interests of Australia in the next ten years'. Almost two-thirds (65%) see cyberattacks from other countries as a 'critical threat', although this is down five points from 2024.

The next highest ranked threat — a military conflict between the United States and China over Taiwan — remained roughly steady, with 61% seeing this potential conflict as a critical threat.

FIGURE 19

Feelings of safety

Now about world events, how safe do you feel?



SAFETY AND THREATS

Fewer Australians saw the ongoing conflicts in Ukraine (47%) and the Middle East (34%) as critical threats.

Meanwhile, concern about ‘a severe downturn in the global economy’ rose by four points to 58%. While fears of a global economic downturn have increased, the change is much less pronounced than in 2020, at the start of the Covid pandemic, when a spike in economic concerns saw seven in ten Australians (71%) rate a downturn as a critical threat.

More than half of Australians (54%) believe climate change is a critical threat to the nation,

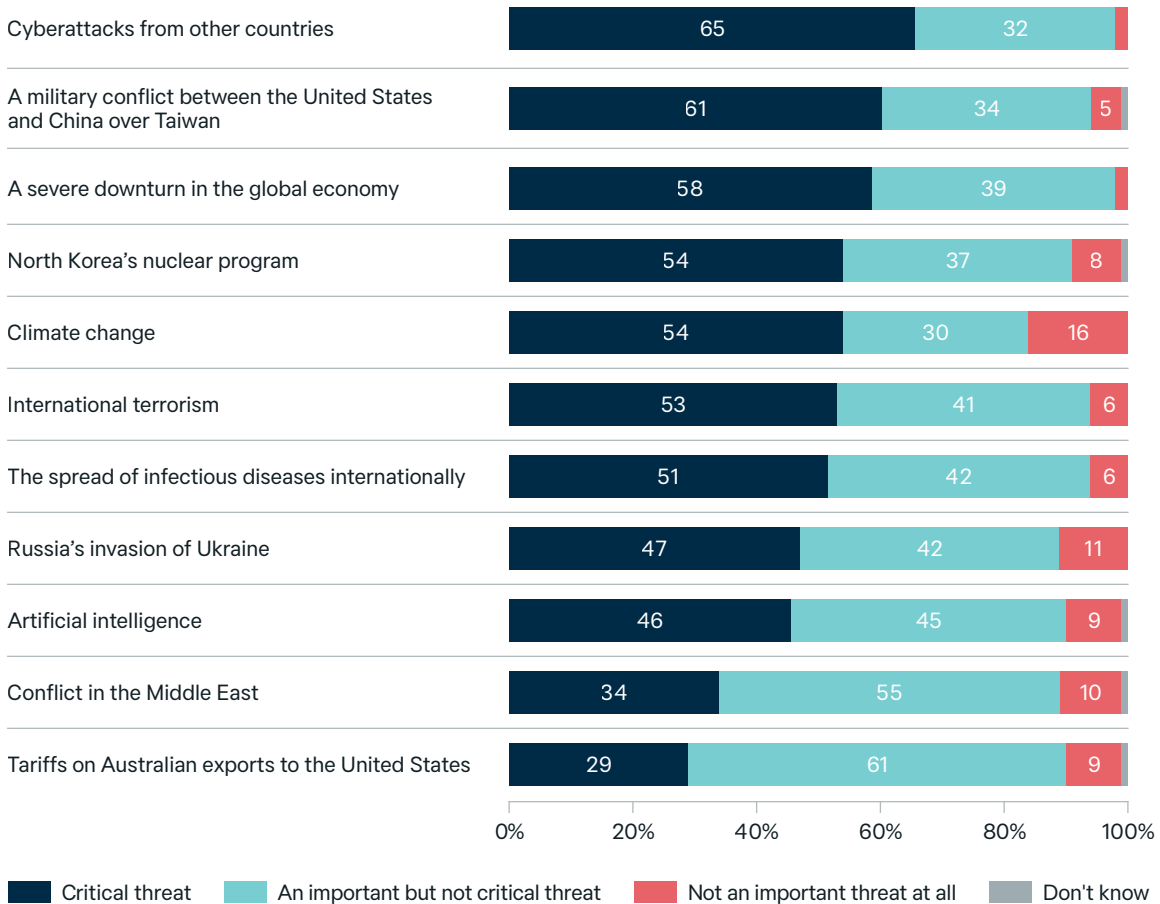
roughly steady on last year. Concerns about North Korea’s nuclear program (54%), international terrorism (53%), and the spread of infectious diseases internationally (51%) also held roughly steady. A substantial minority of 46% see artificial intelligence — added to this list for the first time this year — as a critical threat.

Despite Australians’ strong disapproval of Donald Trump’s use of tariffs (page 12), only three in ten (29%) view ‘tariffs on Australian exports to the United States’ as a critical threat to the national interest. Fieldwork was completed before Trump’s 2 April ‘Liberation Day’ tariffs on countries around the world.

FIGURE 20

Threats to Australia’s 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.



Defence and security

Defence spending

In recent years, there has been a greater focus on whether the Australian Defence Force has the resources and capabilities it needs to meet the threats facing the nation.

In 2023, the Australian government’s National Defence Statement said Australia’s defence posture needed to shift to focus on ‘transforming our future capability such that Australia can resist coercion ... in a much less certain region and world’.¹¹

More recently, the Trump administration has renewed pressure on US allies to increase their defence spending. In a meeting with his Australian counterpart, US Secretary of Defence Pete Hegseth called on Australia to increase its defence spending to 3.5% of GDP as soon as possible.¹² Currently, Australia spends approximately 2% of GDP on defence.

In the leadup to the Australian federal election in May, the Albanese government said it would bring forward additional defence spending, lifting the total to about 2.3% of GDP by 2033. The Coalition said, if elected, it would lift defence spending to 2.5% of GDP by 2030.¹³

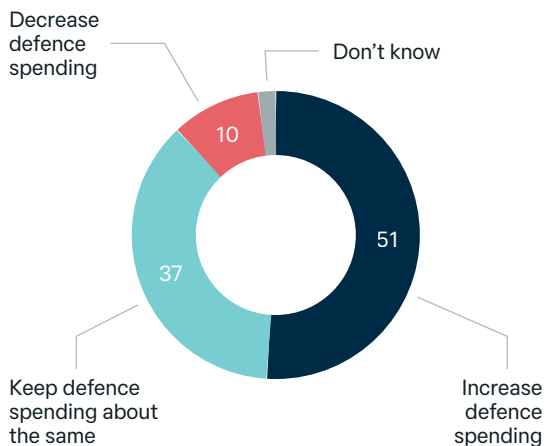
In response to a new question polled separately in April, half the population (51%) say Australia should increase defence spending. A minority (37%) say Australia should keep defence spending at about the same level as now, while only 10% say it should be decreased.

There are clear demographic differences in how Australians respond on this matter — far fewer younger Australians (34% of 18 to 29 year olds) are supportive of increasing defence spending than older Australians (71% of those older than 60). As a group, females (46%) are less supportive than males (58%), and those who lean towards Labor (50%) are less supportive than those who prefer the Coalition (72%).

FIGURE 21

Defence spending

Now thinking about Australia’s defence capabilities. Australia currently spends about 2% of GDP (Gross Domestic Product) on defence. Taking into account global circumstances, do you think Australia should:



AUKUS: Nuclear-powered submarines

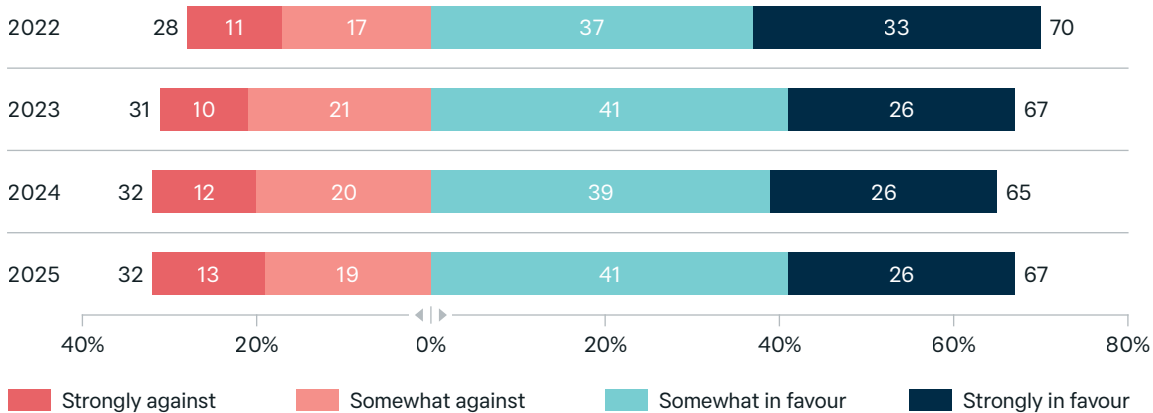
In the fourth year of AUKUS — the security partnership between Australia, the United Kingdom, and the United States — the three governments are proceeding with a plan for Australia to acquire at least three conventionally-armed Virginia class nuclear-powered submarines (SSNs) from the early 2030s. The plan also includes the design and construction of a new SSN-AUKUS class of submarines for delivery to the Royal Australian Navy from the early 2040s.

Since its inception, public debate about this deal has continued, including on its strategic merits, its effect on Australia’s sovereignty, the likelihood of future US political commitment, Australia’s ability to build the requisite industrial and workforce capacity, and the high costs involved. Proponents argue the submarines would improve Australia’s ability to defend itself and contribute to deterring conflict in the region.

FIGURE 22

Acquiring nuclear-powered submarines

Now a question about submarines that are powered by nuclear energy, but do not have nuclear weapons. Are you in favour of or against Australia acquiring nuclear-powered submarines?



Majority public support for acquiring nuclear-powered submarines has held firm. In 2025, two-thirds of Australians (67%) remain either ‘somewhat’ or ‘strongly’ in favour, roughly steady compared to 2022 (70%), shortly after AUKUS was announced. One-third of Australians (32%) are ‘somewhat against’ or ‘strongly against’ acquiring nuclear-powered submarines.

While the submarine deal continues to enjoy bipartisan political support in Australia, more Australians who lean towards the Liberal–National Coalition (84%) than those who lean towards the Labor Party (63%) are in favour of it — a 21-point gap.

Residents of Western Australia, which hosts one of the naval bases for these submarines, are most supportive of the deal (72%), though support in Queensland (70%) is on par with this. There is much lower majority support for it in Victoria (60%).

War in Ukraine: Australia’s response

Three years after Russia’s full-scale invasion of Ukraine, the war is deadlocked. But since taking office in January, Donald Trump has transformed the US position on the conflict. In February, prior to fieldwork for this Poll, Trump publicly berated Ukrainian President Volodymyr Zelenskyy in the

Oval Office, paused American intelligence sharing with Ukraine in February and early March, and voted with Russia and against Europe on UN resolutions on the conflict.

In the wake of President Trump’s actions and comments, UK Prime Minister Keir Starmer and other European leaders have taken a more prominent role in coordinating military and diplomatic support for Ukraine, convening a ‘coalition of the willing’ of liberal democracies. Australian Prime Minister Albanese participated in these talks, and foreshadowed he was ‘open to considering any requests to contribute to a future peacekeeping effort’ in Ukraine.¹⁴

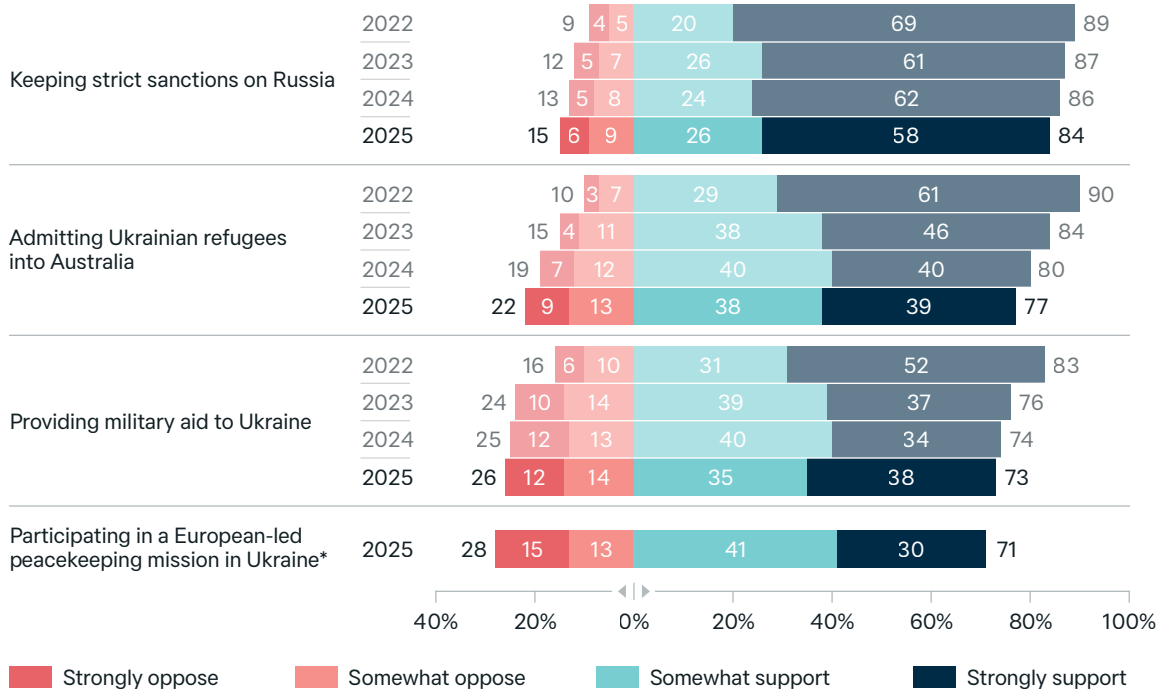
In this context, Australian public support for assisting Ukraine remains high. The vast majority of Australians (84%) continue to support ‘keeping strict sanctions on Russia’, only five points below 2022. More than three-quarters (77%) support ‘admitting Ukrainian refugees into Australia’, roughly steady on last year. Almost three-quarters (73%) support ‘providing military aid to Ukraine’, also steady on last year.

In answer to a new question polled separately in April, a clear majority of Australians (71%) say they support ‘Australia participating in a European-led peacekeeping mission in Ukraine, after a ceasefire has been agreed’. This includes 30% of Australians who would ‘strongly support’ doing so.

FIGURE 23

Australia’s response to the war in Ukraine

Thinking about Russia’s invasion of Ukraine, would you support or oppose Australia:



* The question about ‘Australia participating in a European-led peacekeeping mission in Ukraine’ was fielded in a separate Lowy Institute nationwide poll between 31 March and 13 April 2025: see Methodology for more information.

Willingness to defend Australia

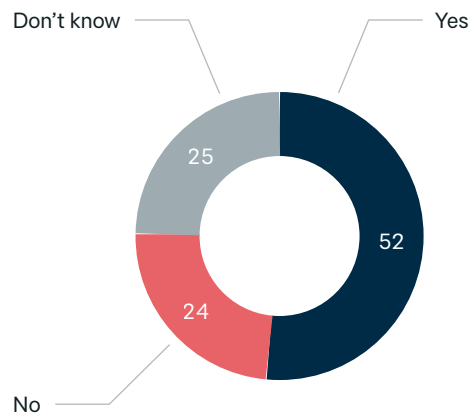
The Australian Defence Force has struggled to recruit sufficient personnel to meet its growing needs.¹⁵ Although it is difficult to predict how Australians would react in the event the country came under military attack, in response to a new question this year, half the adult population (52%) say they would be willing to fight to defend Australia if they were physically capable of doing so. One-quarter (24%) say they would not, while the remainder (25%) say they don’t know or are not sure.

Preparedness to fight for Australia is significantly higher among males (62%) than females (41%), and lower among people aged under 45 (37%) than people aged 45 and over (65%). Of the male population, about half (48%) aged under 45 say they would fight to defend Australia, while a significantly higher proportion of males aged over 45 (74%) would do so.

FIGURE 24

Willingness to defend Australia

If Australia were attacked directly by the military of another country, and you were physically capable of doing so, would you be willing to fight to defend Australia?



Economy and trade

Economic optimism

In 2025, the world faces a highly uncertain economic environment, in large part due to US President Donald Trump's erratic tariff announcements and reactions from major economies.

At time of fieldwork, President Trump had announced plans for 25% tariffs on steel and aluminium imports to the United States, including from Australia. He had also announced or threatened tariffs against China, Canada, Mexico, and

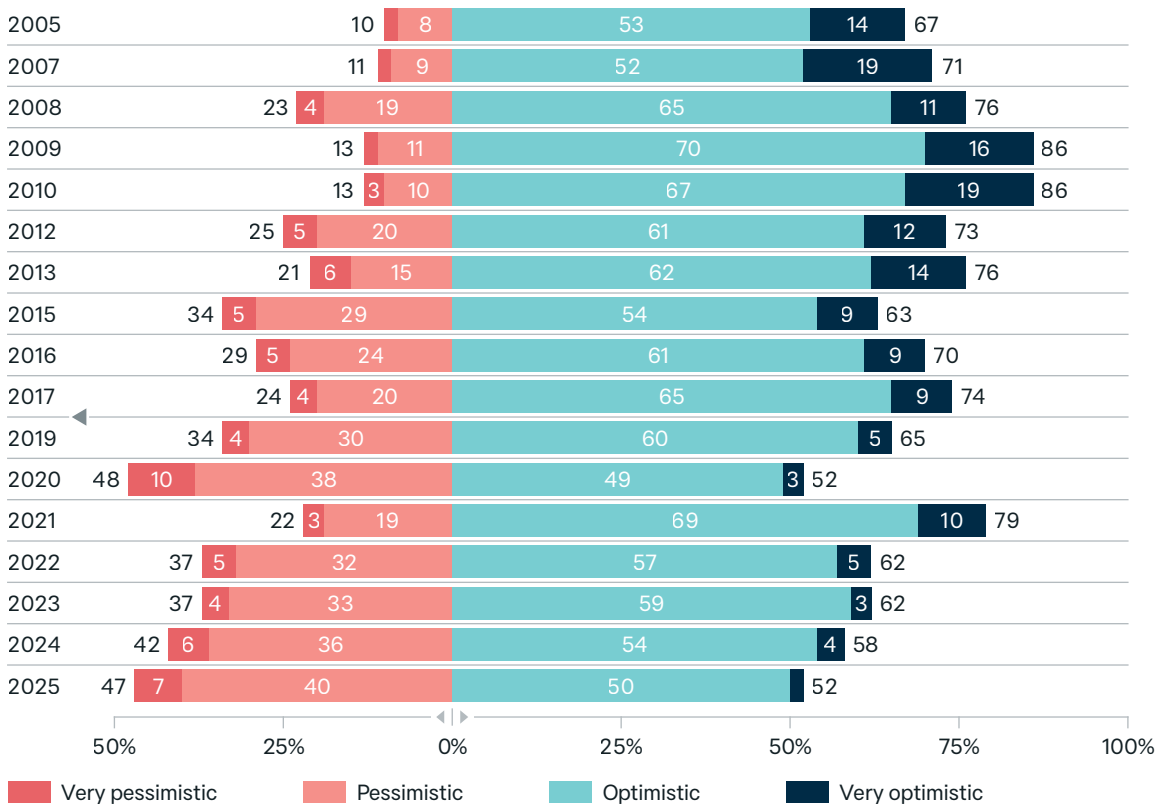
several other countries. He had not yet announced his 2 April 'Liberation Day' tranche of tariffs on countries around the world, and tariffs between the United States and China had not yet escalated to their peak.

Combined with ongoing cost-of-living pressures impacting many households domestically, Australians' sense of economic optimism has now fallen to its lowest point in the Lowy Institute Poll's two-decade history.

FIGURE 25

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?



A neutral option was offered to respondents in 2005 and 2007.

◀ Indicates change in mode: see Methodology.

Only half of Australians (52%) say they feel any level of optimism about Australia’s economic performance over the next five years, equalling a Covid-era low in 2020. Almost no one (2%) says they feel ‘very optimistic’ about the economy. By contrast, almost half of the public (47%) say they feel ‘pessimistic’ (40%) or ‘very pessimistic’ (7%) about the economy.

Those in the 18–29 year age group feel least optimistic about the economy (43%), about ten points lower than levels of optimism in every other age bracket. Australians who lean towards the Labor Party (66%) report higher levels of economic optimism than those leaning towards the Coalition (52%) or the Greens (46%).

Manufacturing in Australia

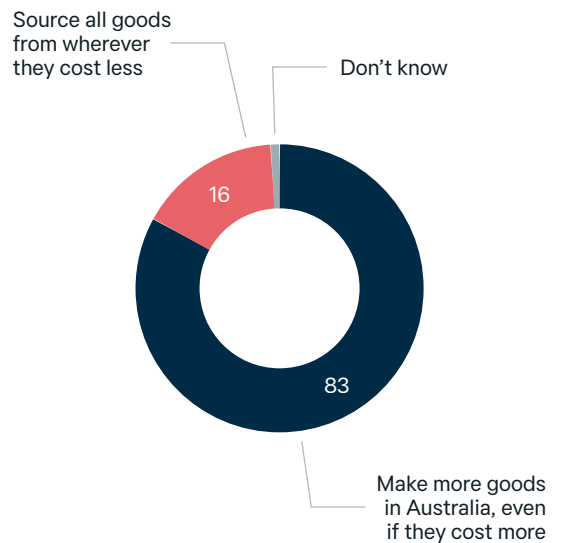
Since the deregulation of the Australian economy in the 1980s, successive governments have largely relied on market forces to determine what Australia produces. In 2024, the Albanese government introduced the ‘Future Made in Australia’ policy — a targeted industrial policy that commits \$23 billion in government subsidies and support over the next decade to help build Australian manufacturing capability in clean energy, green metals and fuels, and minerals processing. This policy focuses on supporting industries aligned with Australia’s net zero transition, as well as improving economic resilience and security.

Critics argue that Australia lacks a competitive advantage in producing some of these products, and should instead import the necessary technologies or components from lower-cost producers. Currently, China dominates critical mineral supply chains and the production of most clean energy technologies.

FIGURE 26

Manufacturing in Australia

Thinking about how Australia sources and makes the goods it needs. Some people say that Australia should make more goods in Australia, even if they cost more, while others say that Australia should source all goods from wherever they cost less. Which comes closest to your view, even if neither is exactly right?



At least in principle, Australians see value in manufacturing more goods domestically. The vast majority of the adult population (83%) say Australia should make more goods in Australia, even if they cost more. Only 16% of Australians say Australia should source all goods from wherever they cost less.

This finding complements the results of a separate question on supply chains asked in 2023, which found that seven in ten Australians (70%) thought the country should prioritise running supply chains through friendly countries, even if it means higher prices.¹⁶

Climate change and energy

Climate change

In 2025, half of the public (51%) say ‘global warming is a serious and pressing problem’ about which ‘we should begin taking steps now, even if this involves significant costs’ — a drop of six points since last year. One-third (33%) 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’, roughly steady on last year. Only 15% take the view that ‘until we are sure that global warming is really a problem, we should not take any steps that would have economic costs’, up three points since last year.

Young Australians continue to view climate change with a greater sense of urgency, with more

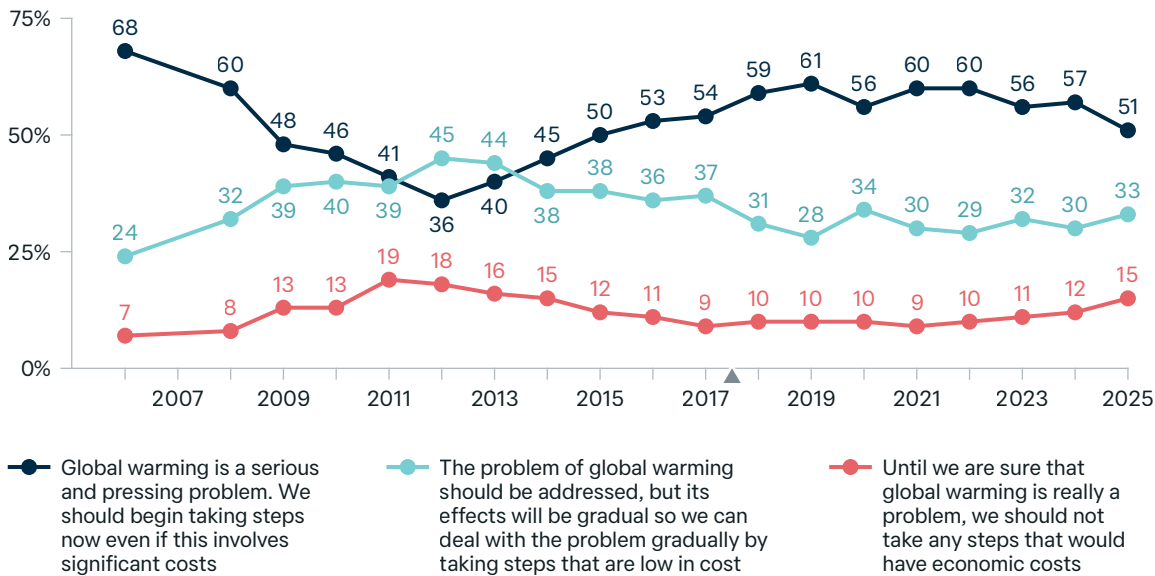
than six in ten Australians (63%) aged 18–29 saying that global warming is a serious and pressing problem — 17 points more than those aged over 60 that say the same (46%). However, since last year, a decline in the sense of urgency across all age groups is most pronounced among the youngest, which saw a ten-point drop.

Political leaning is highly correlated with views on climate change. Two-thirds of Australians (66%) who lean towards Labor say global warming is a serious and pressing problem, compared to around a quarter (27%) of those who lean towards the Liberal–National Coalition. Among the latter group, the most prevalent view (48%) is to deal with climate change gradually, by taking steps that are low in cost.

FIGURE 27

Climate change

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.



▲ Indicates change in mode: see Methodology.

Net zero: economic opportunity or cost

In the leadup to the May election, both major political parties in Australia had committed to bringing Australia’s national greenhouse gas emissions down to net zero by 2050. However, they differed significantly in their messaging on whether the shift to net zero would be an overall benefit or cost to the economy.

Labor set an ambition for Australia to become a ‘renewable energy superpower’, an idea that posits Australia can benefit economically by using its abundant renewable energy to produce low-carbon industrial goods for the world. The Coalition tended to focus on the costs of the energy transition, but argued that its pre-election energy policy would ultimately be cheaper for consumers and taxpayers (see next section).

Australians are roughly split on whether achieving the net zero target would leave the economy better (38%) or worse off (36%). Almost one-quarter (23%) say the transition to net zero would ‘make no difference’ to Australia’s economy.

Australia’s 2050 energy mix

Prior to the election, both major parties put forward markedly different energy plans to achieve their commitment to net zero by 2050.

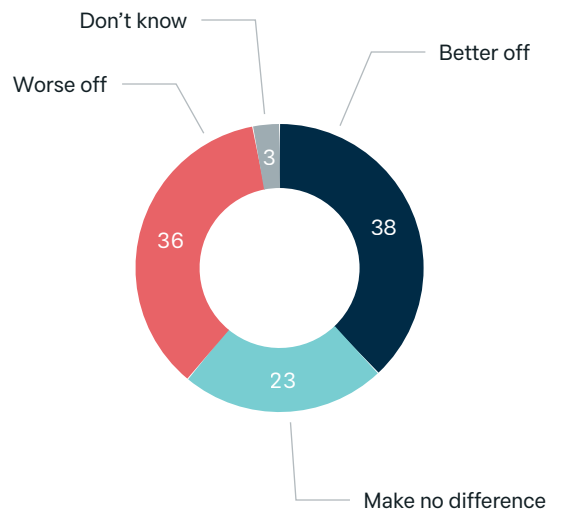
The incumbent Labor government’s plan focused on building a renewables-dominated energy grid firmed by battery storage and backed up by gas generation, while the Coalition opposition proposed establishing a nuclear power industry in Australia to eventually replace baseload coal power, alongside renewables and gas. Both parties contested the costs, emissions impact, and feasibility of the other’s energy plans.

When it comes to how Australians think the country should source its power by 2050, a majority believe at least some role should be played by each of the four energy sources surveyed. But views differ widely on the extent of the role people believe each should play.

FIGURE 28

Net zero: economic opportunity or cost

Both major political parties in Australia have committed to bringing Australia’s national greenhouse gas emissions down to net zero by 2050. This presents both costs and opportunities for the economy. On balance, do you think achieving the net zero target would leave the Australian economy:



Renewables are the most preferred source of power in Australia, with three-quarters of the adult population (75%) saying they should play a ‘major role’ in the energy mix. One-fifth (20%) think they should play a ‘minor role’, while almost no Australians (4%) envisage an energy mix without renewable power.

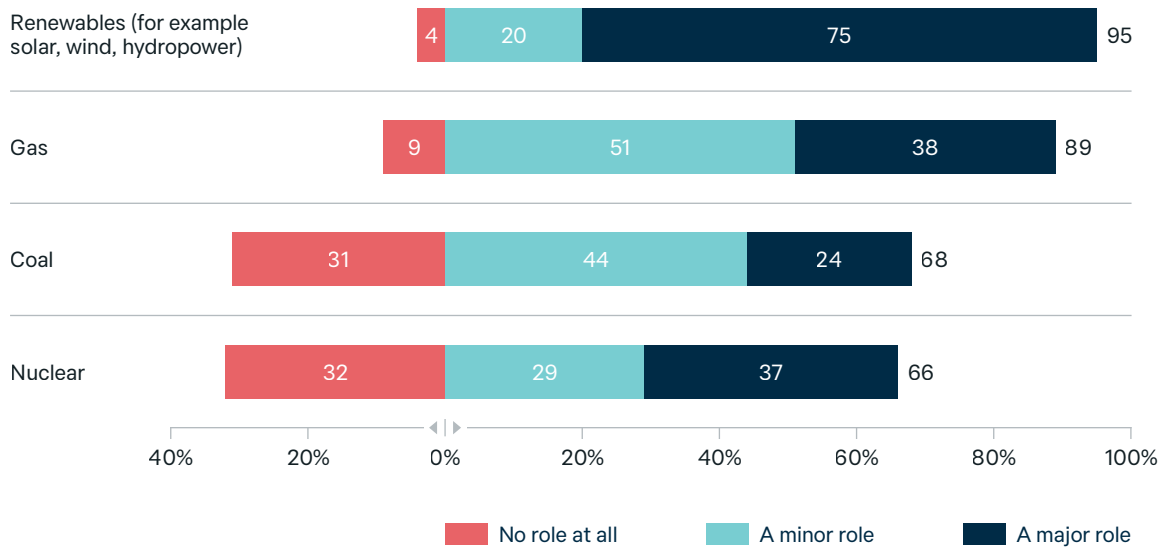
On the place of **gas** in the future energy mix, the largest share of respondents (51%) believe it should play a minor role by 2050, while almost four in ten Australians (38%) see a major role for gas. Only 9% of Australians see no role at all for gas by 2050.

Many Australians also see **coal** continuing to be part of the mix, with the largest share envisaging a minor role (44%) for this energy source by 2050, and one-quarter a major role (24%). However, almost one-third (31%) say coal should no longer play a role in Australia’s energy production by 2050.

FIGURE 29

Australia’s 2050 energy mix

Thinking again about the aim to bring Australia’s national greenhouse gas emissions down to net zero by 2050. How much of a role do you think the following sources of energy should play in Australia’s energy mix by 2050? For each one, please indicate whether you think it should play a major role, minor role, or no role at all.



On **nuclear power** — the only one of the four sources surveyed not currently part of Australia’s energy mix — two-thirds (66%) of the public see some role for nuclear energy by 2050, about the same number that see some role for coal. Almost four in ten Australians (37%) say it should play a major role, and less than a third (29%) a minor role. By contrast, almost one-third (32%) think nuclear should play no role at all — a similar level to the number opposed to coal playing any role in Australia’s long-term energy mix.

Potential climate policies

In 2025, Australians express majority support, in varying degrees, for a range of potential and ongoing federal government climate-related policies.

A number of countries, including Australia, have adopted green industrial policies that provide government subsidies and support for clean energy technology development and manufac-

turing (page 25). The vast majority of Australians (82%) say they support the government ‘providing subsidies for the development of renewable energy technologies’. While still high, support for this has gradually declined from a peak of 91% in 2021.

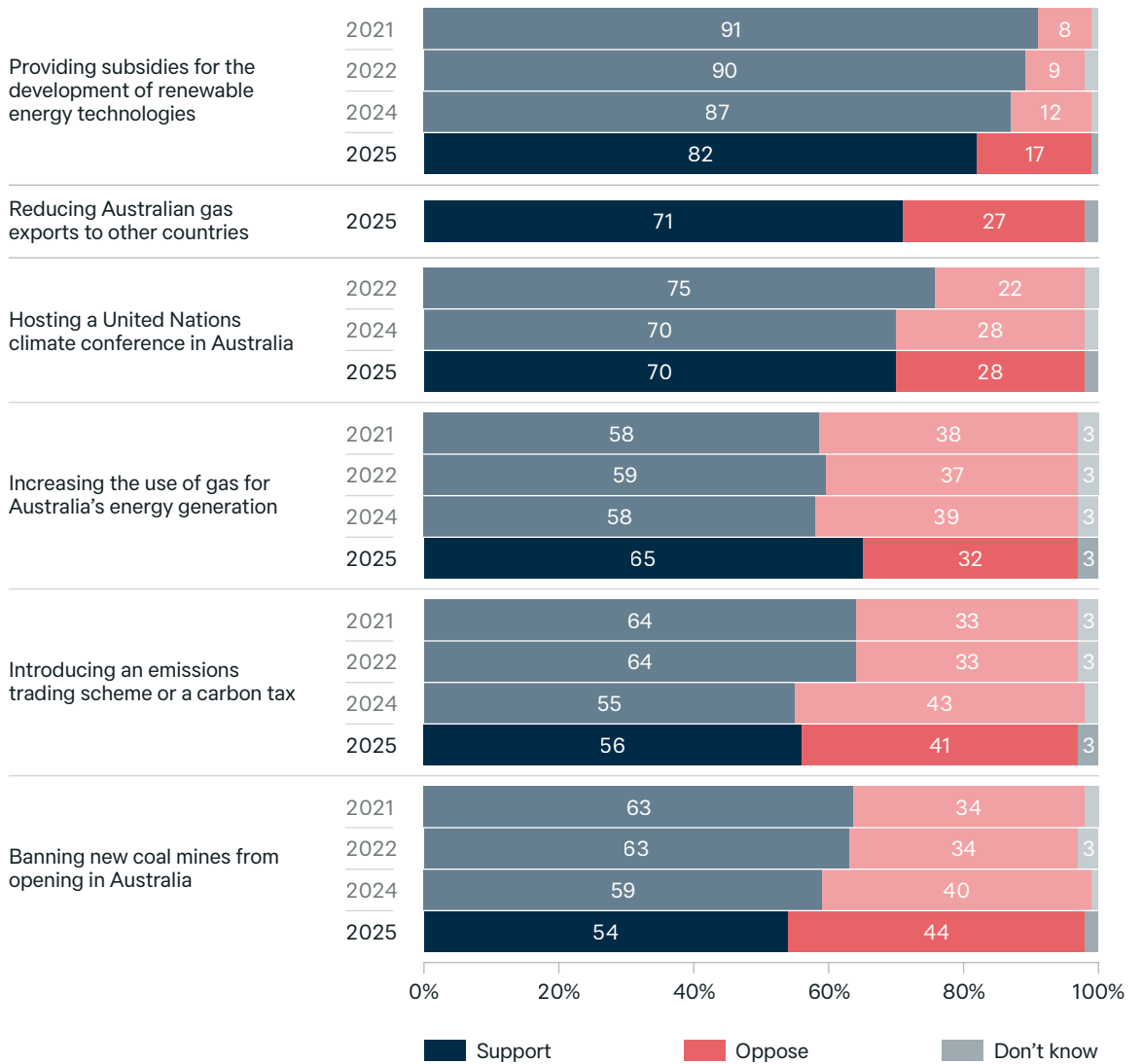
Seven in ten Australians (71%) say they support ‘reducing gas exports to other countries’, a new question this year. Close to three-quarters of the gas produced in Australia is exported.¹⁷ Some groups have advocated for the reduction of gas exports, given their contribution to climate change, while others have proposed doing so to lower domestic energy prices.

However, almost two-thirds of Australians (65%) support ‘increasing the use of gas for energy generation’. This is in line with the finding that a majority of Australians think gas should continue to have some role in Australia’s energy mix by 2050. Gas accounted for approximately 18% of total electricity generation in Australia in 2022–2023.¹⁸

FIGURE 30

Potential federal government policies on climate change

Would you support or oppose the following federal government policies?



Australia is bidding to co-host the United Nations' annual climate conference of the parties in 2026, known as COP31, in partnership with other Pacific Island nations. This initiative continues to have widespread support among Australians (70%), steady from 2024.

More than half of Australians (56%) support introducing an emissions trading scheme or a carbon tax, a drop of eight points since 2022.

While an economy-wide emissions trading scheme is no longer under active debate in Australian politics, the government's reformed Safeguard Mechanism does allow for emissions trading as part of a system to curb emissions in high-emitting industries.

A slim majority continue to support banning new coal mines (54%), a drop of nine points from 63% in 2022.

Foreign aid

In 2025, the Trump administration closed the US Agency for International Development (USAID), the world’s largest government aid agency, with the drastically reduced aid program to be administered by the US Department of State. Several European donors, including the United Kingdom, have also announced significant but less severe cuts to their aid programs, with some citing the need to fund higher defence spending.¹⁹ These cuts have opened up funding gaps in several sectors and regions, including in the Indo-Pacific.²⁰

Currently, the Australian government provides approximately \$5 billion in official development assistance each year (representing about 0.7% of the federal budget in 2025) to developing coun-

tries, focused especially on the Pacific and South-east Asia. This is roughly steady on spending last year in real terms.

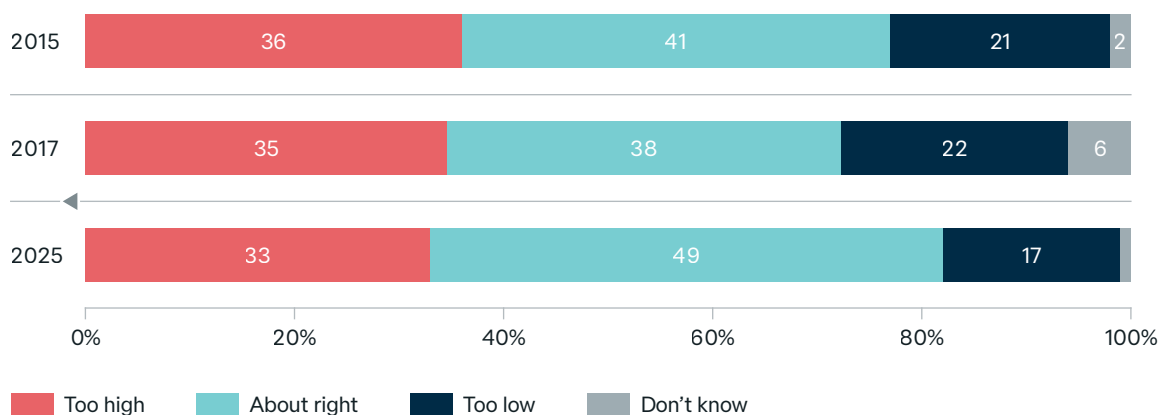
With the government committing to a 2.5% annual increase through the next decade, the Australian aid budget is projected to plateau at around \$5 billion per annum when adjusted for inflation. As a proportion of gross national income, it is forecast to gradually fall from 0.18% at present.²¹

In 2025, two-thirds of Australians (66%) say that the current aid budget is ‘about right’ (49%) or ‘too low’ (17%). One-third say that it is ‘too high’ (33%). Compared with 2017, this represents a significant increase of 11 points in the number who say the aid budget is ‘about right’.

FIGURE 31

Support for size of aid budget

Thinking now about the aid the Australian government provides to developing countries. Currently, the government provides approximately \$5 billion annually in aid to developing countries, or around 0.7% of the budget.* Do you think this is too high, too low, or about right?



* In 2015, the question used the values ‘\$5 billion in aid...or around 1.2% of the Budget’. In 2017, the question used the values ‘\$3.8 billion in aid...or around 0.8% of the Budget’.

◀ Indicates change in mode: see Methodology.

Societal issues

Democracy

Democracy as the best form of government

Three-quarters of Australians (74%) see democracy as preferable to any other kind of government, equalling a record high in 2022. The number who say ‘in some circumstances, a non-democratic government can be preferable’ fell three points to 15%. One in ten Australians (10%) continue to say ‘it doesn’t matter what kind of government we have’.

There has been a longstanding age gap in response to this question. Younger Australians (67% of those aged 18–44) are less likely than older Australians (80% of those aged over 45) to say democracy is preferable to any other kind of government — a 13-point gap. The persistence of an age gap since 2012 indicates preference for democracy is associated with a stage of life rather than a particular generation.

Ideal government

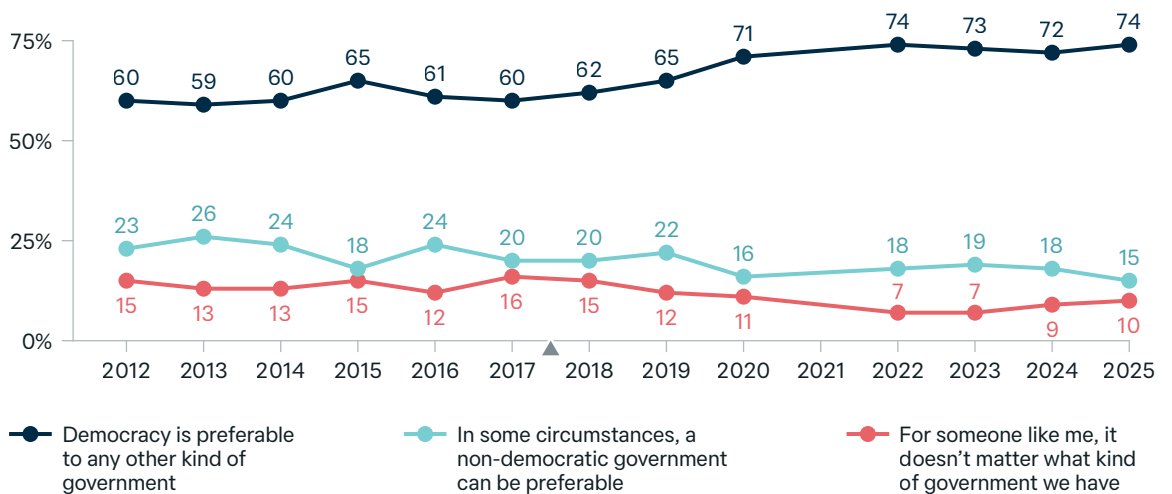
When asked to name one country or territory that comes closest to their ideal form of government, people most frequently mention Australia (24%). The next most named country is New Zealand (9%), followed by the United States (7%). Many Australians appear to idealise the governance systems of Nordic countries, with Sweden (5%), Norway (4%), Denmark and Finland (both 3%) all appearing in the top ten. Singapore (4%) and Japan (3%) were the only two Asian countries in the top ten.

Democracy appears to be a common feature among these countries, with eight of the top ten most frequently named countries also rated as ‘full democracies’ in *The Economist Intelligence Unit’s* 2024 Democracy Index, while the United States and Singapore were rated as ‘flawed democracies’.

FIGURE 32

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.



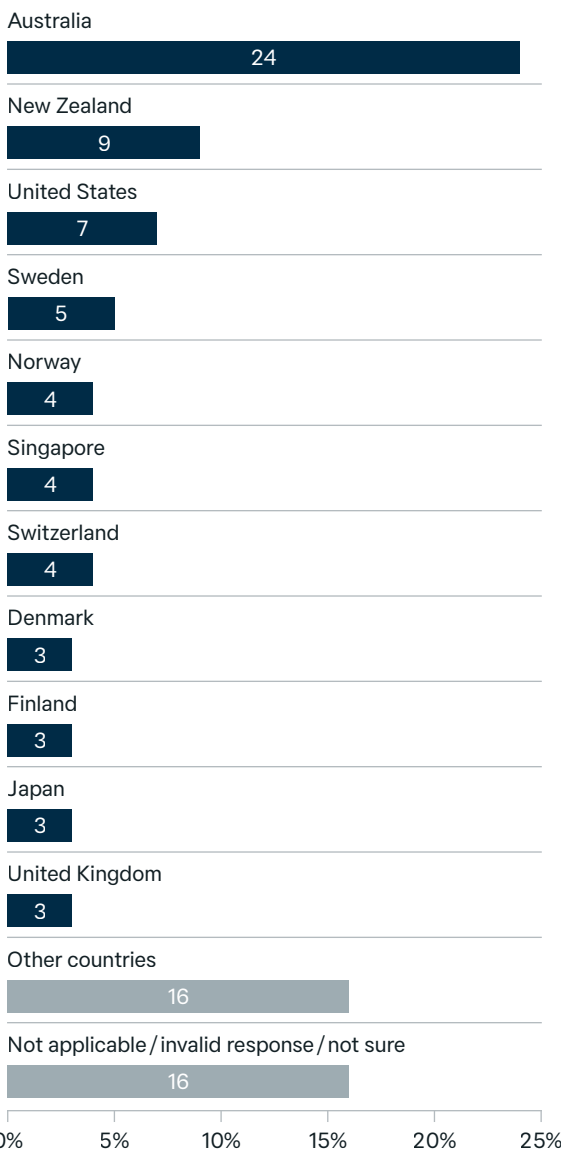
SOCIETAL ISSUES

Respondents who selected ‘in some circumstances, a non-democratic government can be preferable’ in the previous question (page 31), most frequently name Singapore (12%) as closest to their ideal.

FIGURE 33

Ideal form of government

Please name one country or territory that you think comes closest to implementing your ideal form of government:

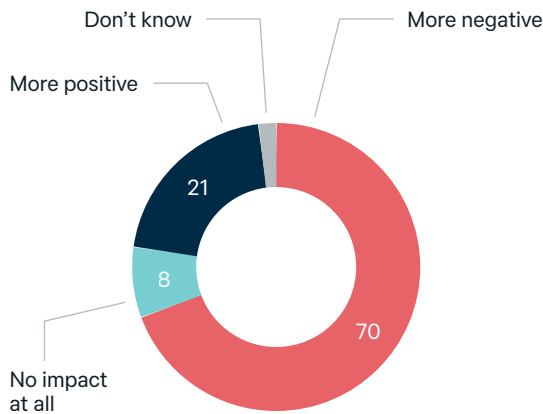


Respondents could submit any answer as open text for this question.

FIGURE 34

Social media and democracy

Now a question about the impact of social media on democracy. On balance, do you think social media has more of a positive or negative impact on democracy, or no impact at all?



Social media and democracy

In a period that saw tech billionaire and X owner Elon Musk assume unprecedented powers in the Trump administration, and a ban on social media for children under 16 take effect in Australia, debates about the reach and impact of social media on society are only growing.

Seven in ten Australians (70%) think social media has a more negative than positive impact on democracy. One-fifth (21%) say it has a more positive impact, while only 8% say social media has no impact at all on democracy.

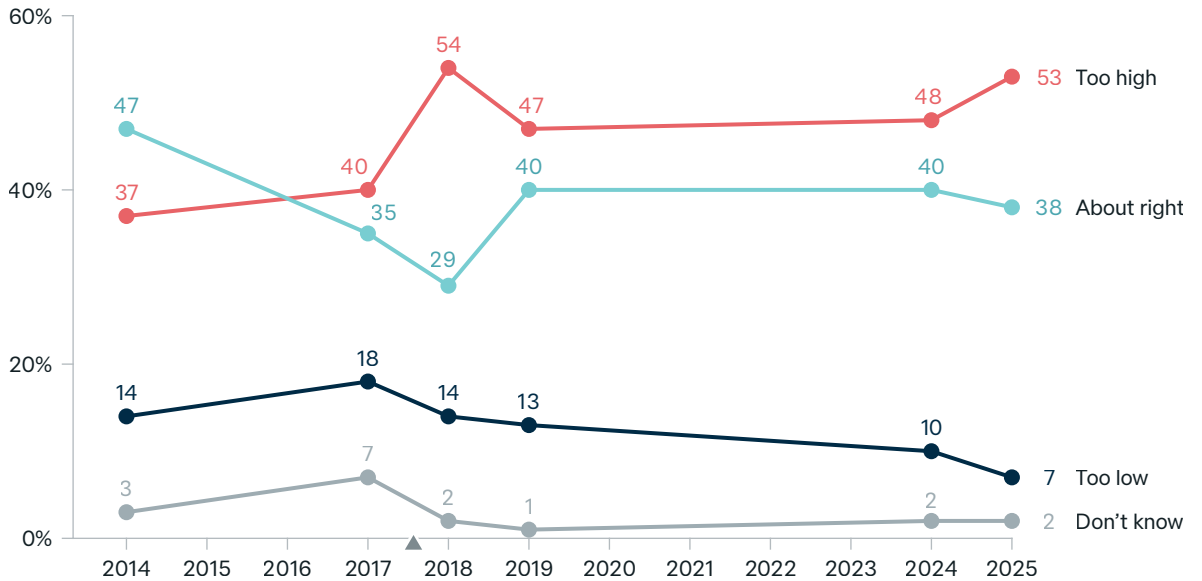
Immigration

After a freeze on new arrivals during the Covid pandemic, Australia’s net overseas migration rapidly expanded to a peak of 536,000 in 2022–23 due to pent-up demand from students, backpackers, and temporary workers, as well as lower than usual departures.²² More recently, official figures show net migration fell by 100,000 last year, which puts it on a trajectory back to pre-pandemic levels.²³ However, in the context of cost-of-living and housing pressures, immigration was a contested political issue in the leadup to Australia’s 2025 federal election.

FIGURE 35

Immigration rate

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



▲ Indicates change in mode: see Methodology.

More than half the population (53%) say the total number of migrants coming to Australia each year is ‘too high’, a five-point increase since last year and on par with the previous high in 2018 (54%). Less than half (45%) think immigration levels are either ‘about right’ (38%) or ‘too low’ (7%).

International students

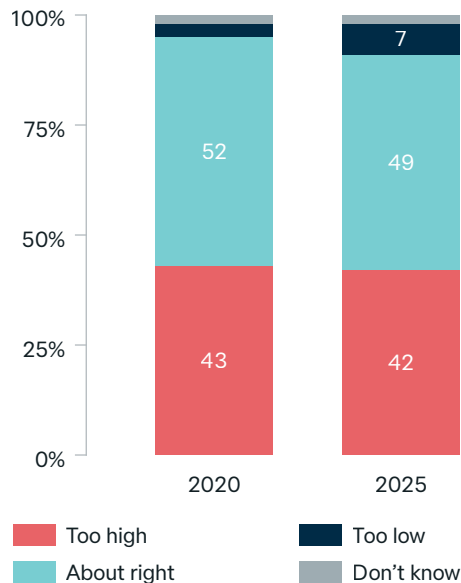
The largest group of migrant arrivals to Australia is temporary students, with about 315,000 new overseas students commencing study in the higher education and vocational sectors last year. In the 2025 federal election campaign, both parties pledged to cap or reduce the annual student intake.²⁴

This year, more than half of Australians (56%) say the number of international students enrolled at Australian universities is either ‘about right’ (49%) or ‘too low’ (7%). However, 42% say the student intake is ‘too high’.

FIGURE 36

International students in Australia

Thinking about the numbers of international students enrolled at Australian universities, do you think the numbers are:



Government performance and the 2025 election

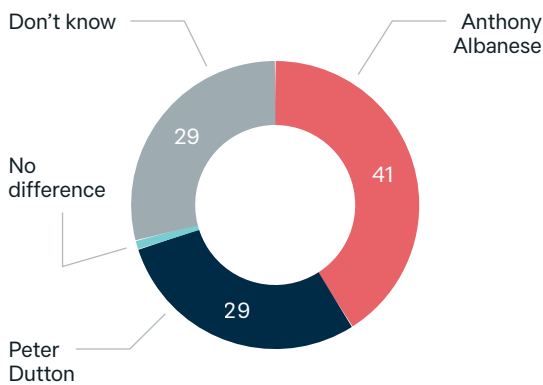
Better foreign policy prime minister

In early March, prior to the May 2025 federal election, we asked Australians which political leader would be more competent at handling Australian foreign policy over the next three years. Incumbent Prime Minister Anthony Albanese (41%) led then Opposition leader Peter Dutton (29%) on this measure by 12 points. A significant number of Australians (29%) were undecided.

FIGURE 37

Better foreign policy prime minister

Over the next three years, do you think Anthony Albanese or Peter Dutton would be more competent at handling Australia's foreign policy?



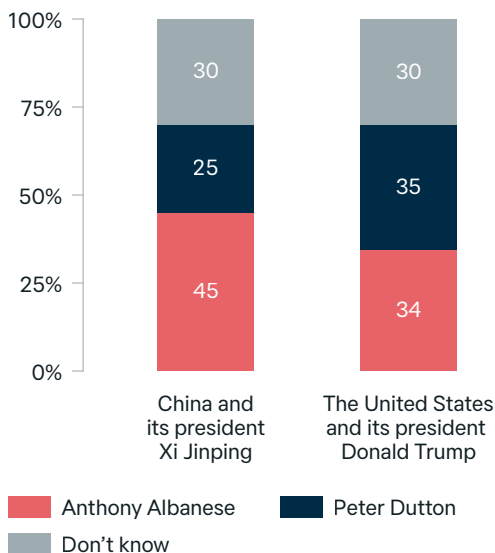
Better at managing Trump and Xi

Foreign policy does not often figure heavily in Australian federal election campaigns. However, global disruptions in 2025 focused public attention on Australia's relationships with its main security ally, the United States under President Donald Trump, and main trading partner, China under President Xi Jinping.

FIGURE 38

Better at managing Trump and Xi

Do you think Anthony Albanese or Peter Dutton would be better as prime minister at managing Australia's relationship with:



In March, Australians were almost evenly split on whether Peter Dutton (35%) or Anthony Albanese (34%) would be better as prime minister at managing Australia's relationship with the United States and Donald Trump.

By contrast, Anthony Albanese (45%) enjoyed a 20-point lead over Peter Dutton (25%) in Australians' confidence in him to manage the relationship with China and Xi Jinping.

Better party by foreign policy issue

We also asked Australians which of the two major political parties they thought would do a better job at handling specific foreign policy issues. No party had a majority on any single issue.

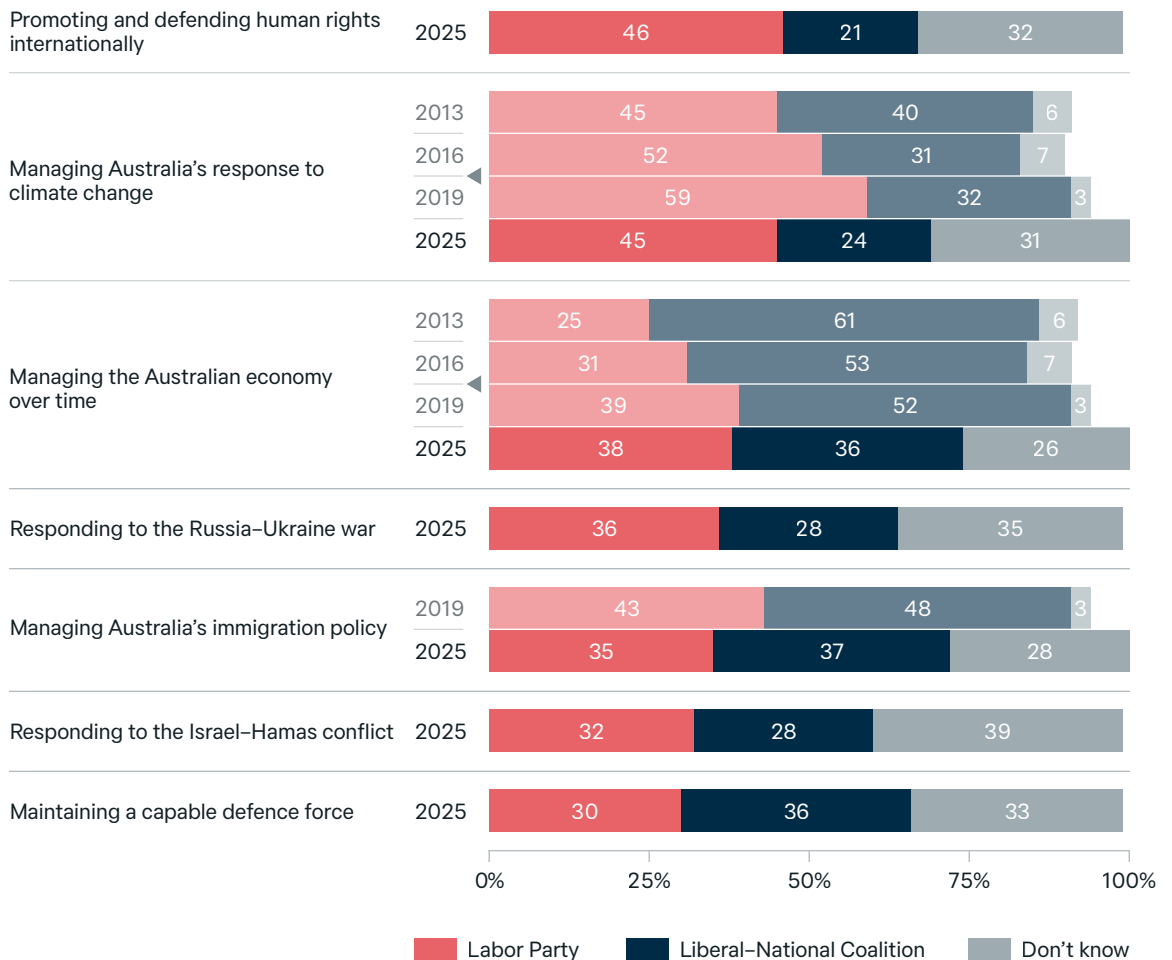
The incumbent Labor government had the most pronounced leads over the Liberal–National Coalition opposition on promoting and defending human rights (25-point lead) and managing immigration (two-point lead for the Coalition), and managing the economy (two-point lead for Labor).

Australians also said Labor would do a better job than the Coalition at responding to the Russia–Ukraine war (eight-point lead). By contrast, the Coalition was preferred on maintaining a capable defence force (six-point lead). Responses were more evenly divided on responding to the Israel–Hamas conflict (four-point lead for Labor with a greater proportion of undecideds than support for either of the parties), managing immigration (two-point lead for the Coalition), and managing the economy (two-point lead for Labor).

FIGURE 39

Better party by foreign policy issue

Which party, either the Labor Party or the Liberal–National Coalition, do you personally think would do a better job at handling each of these issues:



◀ Indicates change in mode: see Methodology.

About the Poll

Methodology

The 2025 Lowy Institute Poll reports the results of a nationally representative survey of 2117 Australian residents aged 18 and above, conducted between 3 and 16 March on behalf of the Lowy Institute by the Social Research Centre (SRC). The survey uses the Life in Australia™ panel, currently the only probability-based online panel in Australia.

On a simple random sample of 2117 responses, the margin of error is approximately 2.1%. Where a complex sample is used, the ‘design effect’ measures the additional variance in comparison with a simple random sample. The design effect for this survey is 1.23. For the 2025 Lowy Institute Poll survey, a completion rate of 65.6% was achieved. Taking into account the recruitment rate to the panel and attrition from the panel, the cumulative response rate is 2.6%.

Two questions in this report, on defence spending (page 21) and participating in a peacekeeping mission in Ukraine (pages 22–23), were fielded in a separate ‘mini poll’ survey of 1997 adults across Australia running from 31 March to 14 April. On a simple random sample of 1997 responses, the margin of error is approximately 2.2%. 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 1.26. For this mini poll, a completion rate of 61.9% was achieved.

Members of the SRC’s Life in Australia™ 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. 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 2025, the sampling methodology for the Lowy Institute Poll was adjusted to improve the precision of estimates pertaining to political leaning. This involved selecting a sub-sample of the Life in Australia™ panel prior to fieldwork so that probabilities of selection were in proportion to a sampling weight that combines demographic data from the Census and Australian Electoral Commission data about past vote (2022). The changes resulted in an improved overall design effect of 1.23 compared to 1.27 in 2024. This sampling change may have had some impact on results that are highly correlated with political leaning.

SRC uses a mixed-mode approach for the survey, including online surveys (99% of respondents) and computer-assisted telephone interviewing (1% of respondents) to provide coverage of the offline population (households without internet access). In 2019, the Lowy Institute completed a three-year transition in the mode for the Poll, which until 2017 was conducted solely by telephone. The transition to a predominantly online survey panel reflects the declining response rates for telephone surveys and now widespread internet access in Australia.

The majority of questions in the 2025 survey are ‘tracking’ questions that have been asked in previous Lowy Institute Polls, allowing us to

Interactive data for all results and previous Poll reports can be accessed through our website: <https://poll.lowyinstitute.org>

compare public opinion on a single issue over time. The order of questions in the questionnaire was different from the order presented in this report. Footnotes and markers (▲, ◀) have been used in the charts in the Poll to represent the change of mode, which can potentially elicit slightly different responses.

Totals in this report 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.

Following fieldwork, data are weighted for recruitment to the panel, probability of selection to the Lowy Institute Poll, probability of completing the survey conditional on being invited, and adjusted to ensure that the weighted sample resembles the Australian resident adult population on number of adults in household, age, education, gender, use of a language other than English at home, location (capital city or rest of state/territory), and state/territory of residence, where benchmarks are sourced from the Australian Bureau of Statistics.

Life in Australia™ members are offered a small incentive for joining the panel and another incentive for each survey they complete — \$10 redeemable for a gift card for online panellists, a \$10 gift card for offline panellists, or donation to a nominated charity.

Online responses were subject to quality control checks including examination of other specific responses and time taken to complete the survey. Telephone survey responses were subject to supervision by remote monitoring.

Acknowledgements

The Lowy Institute Poll is a whole-of-institute effort, produced with the assistance of many colleagues and experts.

Fieldwork was managed by Jane Shore and Tina Petroulias of the Social Research Centre. Benjamin Phillips, Andrew Ward, Dina Neiger, Sam Slamowicz, and Jack Barton of the Social Research Centre provided advice on design, weighting, and statistical analysis. John Davis of Omnipoll provided independent advice and reviewed the questionnaire and report.

Stephen Hutchings designed the 2025 Lowy Institute Poll report and interactive website. Ian Bruce provided design assistance.

Hervé Lemahieu, Clare Caldwell, and Sam Roggeveen edited the report. Review, guidance, and expert contributions on various aspects of the questionnaire or report were provided by Michael Fullilove, Hervé Lemahieu, Richard McGregor, Roland Rajah, Mihai Sora, Frank Jotzo, Amandine Denis-Ryan, Max Broad, and Grace Stanhope. Clare Caldwell and Max Broad assisted with data-checking.

Several questions in this and previous Lowy Institute Polls were modelled on those developed by other organisations, including the Chicago Council on Global Affairs, the Pew Research Center, Australian Election Study, Scanlon Foundation Research Institute, Ipsos MORI, Essential, and CBS News.

Notes

- 1 President Donald Trump's 2025 Executive Orders: <https://www.aljazeera.com/news/2025/4/29/trumps-100-day-scorecard-executive-orders-tariffs-and-foreign-policy>
<https://www.federalregister.gov/presidential-documents/executive-orders/donald-trump/2025>
- 2 Parliament of Australia, The ANZUS Treaty, https://www.aph.gov.au/~media/wopapub/house/committee/jfadt/usrelations/report/appendixb_pdf.ashx
- 3 "Trump Casts Doubt on Willingness to Defend Nato Allies 'If They Don't Pay'", *The Guardian*, 7 March 2025, <https://www.theguardian.com/us-news/2025/mar/07/donald-trump-nato-alliance-us-security-support>
- 4 Anthony Salvanto et al, "Trump's Return to Office Greeted with Optimism, High Expectations — CBS News Poll", CBS News, 20 January 2025, <https://www.cbsnews.com/news/trump-return-to-office-opinion-poll-2025-01-19/>
- 5 Ruth Igielnik, "President Trump's Approval Rating: Latest Polls, *The New York Times*, 27 May 2025, <https://www.nytimes.com/interactive/polls/donald-trump-approval-rating-polls.html>; Gary Langer, "Trump has Lowest 100-Day Approval Rating in 80 Years: Poll", ABC News, Washington Post/Ipsos poll, fielded 18 to 22 April 2025, <https://abcnews.go.com/Politics/trump-lowest-100-day-approval-rating-80-years/story?id=121165473>; and Ariel Edwards-Levy, "CNN Poll: A Growing Majority Says Trump has Made the Economy Worse, with Most Skeptical of his Tariff Plans", CNN, CNN/SSRS poll, fielded 17 to 24 April, <https://edition.cnn.com/2025/04/28/politics/poll-trump-economy-tariffs>
- 6 Edward Helmore, "Trump Says he 'Doesn't Rule Out' Using Military Force to Control Greenland", *The Guardian*, 5 May 2025, <https://www.theguardian.com/us-news/2025/may/04/trump-greenland-denmark-military-force>
- 7 US Secretary of State Marco Rubio, interview with Megyn Kelly, US Department of State, 30 January 2025, <https://www.state.gov/secretary-marco-rubio-with-megyn-kelly-of-the-megyn-kelly-show/>
- 8 Ray Wang, "DeepSeek is Reshaping China's AI Landscape", *Foreign Policy*, 29 January 2025, <https://foreignpolicy.com/2025/01/29/deepseek-china-ai-chatgpt-stocks/>
- 9 Lowy Institute, *Pacific Aid Map 2024*, <https://pacificaidmap.lowyinstitute.org/map/>
- 10 Lowy Institute, *Global Diplomacy Index 2024*, <https://globaldiplomacyindex.lowyinstitute.org/>
- 11 Launch of the National Defence Strategy and Integrated Investment Program, Australian Government, Defence, 11 April 2024, <https://www.minister.defence.gov.au/speeches/2024-04-17/launch-national-defence-strategy-and-integrated-investment-program>
- 12 US Department of Defense, "Readout of Secretary of Defense Pete Hegseth's Bilateral Meeting With Australia", 1 June 2025, <https://www.defense.gov/News/Releases/Release/Article/4202734/readout-of-secretary-of-defense-pete-hegseths-bilateral-meeting-with-australia/>
- 13 Andrew Greene and Jane Norman, "Coalition Unveils Massive Defence Spending Boost as Dutton Pledges to Keep Australians Safe", ABC News, 22 April 2025, <https://www.abc.net.au/news/2025-04-22/coalition-unveils-defence-spending-boost-federal-election-2025/105203638>
- 14 Prime Minister Anthony Albanese, "Statement on 'Coalition of the Willing' Leaders' Meeting", 16 March 2025, <https://www.pm.gov.au/media/statement-coalition-willing-leaders-meeting>
- 15 Ben Felton and Kylie Leonard, "The Continuing Decline of the ADF Workforce", *Australian Defence Magazine*, 22 May 2024, <https://www.australiandefence.com.au/news/news/the-continuing-decline-of-the-adf-workforce>
- 16 Lowy Institute, *Lowy Institute Poll 2023*, <https://poll.lowyinstitute.org/charts/supply-chains/>
- 17 Department of Climate Change, Energy, the Environment and Water, "Australian Energy Update 2024", p. 39, August 2024, https://www.energy.gov.au/sites/default/files/2024-08/australian_energy_update_2024.pdf; and "Australia's Gas Policy Mess: Fact Sheet", The Australia Institute, 21 October 2024, <https://australiainstitute.org.au/post/australias-gas-policy-mess-fact-sheet/>
- 18 Department of Climate Change, Energy, the Environment and Water, "Australian Energy Statistics, Table O", August 2024, https://www.energy.gov.au/sites/default/files/2024-08/australian_energy_statistics_2024_table_o.xlsx
- 19 Philip Loft and Philip Brien, "UK to Reduce Aid to 0.3% of Gross National Income from 2027", House of Commons Library, UK Parliament, 28 February 2025, <https://commonslibrary.parliament.uk/uk-to-reduce-aid-to-0-3-of-gross-national-income-from-2027/>
- 20 Alexandre Dayant, "Aid on Ice: How Trump's Freeze Hurts the Pacific and Southeast Asia", *The Interpreter*, 10 February 2025, <https://www.lowyinstitute.org/the-interpreter/aid-ice-how-trump-s-freeze-hurts-pacific-southeast-asia>
- 21 Development Policy Centre, *Australian Aid Tracker*, accessed May 2025, <https://devpolicy.org/aidtracker/trends/>
- 22 Australian Bureau of Statistics, "Overseas Migration", 13 December 2024, <https://www.abs.gov.au/statistics/people/population/overseas-migration/latest-release>
- 23 Tom Crowley, "With Net Migration Tumbling from Great Heights, Experts Say 'Surge' Talk is Overblown", ABC News, 30 March 2025, <https://www.abc.net.au/news/2025-03-30/migration-already-falling-despite-election-debate-over-surge/105111118>
- 24 Maani Truu, "Coalition Pledges to Limit New International Student Enrolments to 240,000 per Year", ABC News, 6 April 2025, <https://www.abc.net.au/news/2025-04-06/coalition-to-cap-international-students-240000/105142968>

Figures

FIGURE 1	Trust in the United States	6	FIGURE 21	Defence spending	21
FIGURE 2	Trust in global powers	6	FIGURE 22	Acquiring nuclear-powered submarines	22
FIGURE 3	Confidence in world leaders	7	FIGURE 23	Australia's response to the war in Ukraine	23
FIGURE 4	Feelings thermometer	8	FIGURE 24	Willingness to defend Australia	23
FIGURE 5	Feelings thermometer — select historical responses	9	FIGURE 25	Economic optimism	24
FIGURE 6	US alliance: importance to Australia's security	10	FIGURE 26	Manufacturing in Australia	25
FIGURE 7	United States' defence of Australia	11	FIGURE 27	Climate change	26
FIGURE 8	Donald Trump: optimism	11	FIGURE 28	Net zero: economic opportunity or cost?	27
FIGURE 9	Australia and the United States under President Trump	12	FIGURE 29	Australia's 2050 energy mix	28
FIGURE 10	Policies of President Trump	13	FIGURE 30	Potential federal government policies on climate change	29
FIGURE 11	China: economic partner or security threat	14	FIGURE 31	Support for size of aid budget	30
FIGURE 12	China as a military threat	15	FIGURE 32	Democracy	31
FIGURE 13	China: Australian policy settings	15	FIGURE 33	Ideal form of government	32
FIGURE 14	Superpowers in the future	16	FIGURE 34	Social media and democracy	32
FIGURE 15	US–China technological competition	16	FIGURE 35	Immigration rate	33
FIGURE 16	Relations with superpowers: United States and China	17	FIGURE 36	International students in Australia	33
FIGURE 17	More reliable partner: Xi or Trump	17	FIGURE 37	Better foreign policy prime minister	34
FIGURE 18	Influence in Pacific Island countries	18	FIGURE 38	Better at managing Trump and Xi	34
FIGURE 19	Feelings of safety	19	FIGURE 39	Better party by foreign policy issue	35
FIGURE 20	Threats to Australia's vital interests	20			

Cover photograph: Ishan @seefromthesky / Unsplash

About the author



Ryan Neelam is Director of the Public Opinion and Foreign Policy Program at the Lowy Institute. He leads the Institute's annual flagship publication, the Lowy Institute Poll, as well as the Global Diplomacy Index, and writes on climate diplomacy and multilateral policy.

Prior to joining the Lowy Institute in 2023, Ryan served as an Australian diplomat for 14 years, including acting as Consul-General to Hong Kong and Macau, and as an expert delegate to the United Nations Headquarters in New York during Australia's last UN Security Council term. He has managed key diplomatic relationships, developed policy, and represented Australia on global economic, climate change, human rights, and peace and security issues.

Ryan holds a Bachelor of Economics and Social Sciences (Honours) from the University of Sydney.

Explore the data on our interactive site

<https://poll.lowyinstitute.org>

LOWY INSTITUTE