

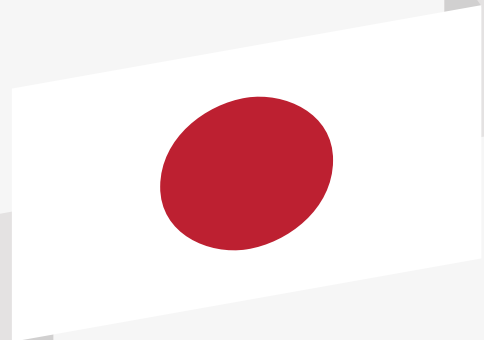
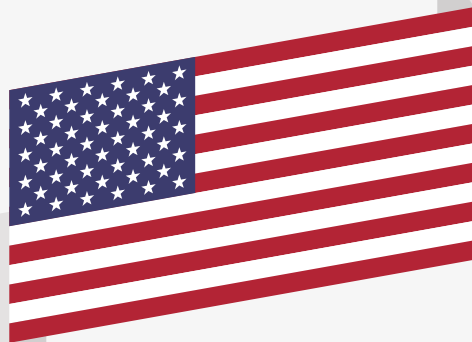


**UNITED STATES
STUDIES CENTRE**

ALLIES AND PARTNERS POLL 2024

Australia, the United States and Japan converge on alliances and China despite US election uncertainties

Jared Mondschein, Samuel Garrett and Ava Kalinauskas | September 2024





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This publication may be cited as:

Jared Mondschein, Samuel Garrett and Ava Kalinauskas, “Allies and partners poll 2024: Australia, the United States and Japan converge on alliances and China despite US election uncertainties,” United States Studies Centre at the University of Sydney, September 2024.

Research conclusions are derived independently and authors represent their own view, not those of the United States Studies Centre.

Foreword

Polling results this year indicate that publics in the United States, Australia and Japan continue to prefer an alliance-centric approach to managing security challenges in the Indo-Pacific.

This trend began in 2014, when Japanese Prime Minister Shinzo Abe expended significant political capital to pass legislation to allow Japan to use armed force for “collective self-defence” with like-minded allies. At the time, Australia’s Abbott government was completing a bilateral free trade agreement with China. Concurrently, the Obama administration was deploying considerable diplomatic efforts in the bilateral US–China strategic and economic dialogue and debating the merits of Beijing’s proposal for a “New Model of Great Power Relations,” that would have represented a bilateral US–China condominium that was opposed by Japan.

Public views of China were more benign 10 years ago as well: the Lowy Institute found that the Australian public’s warmth towards China had just broken a new record of 60% favourability, with US views of China lower but at a high of 43% favourability according to Gallup. However, Pew found positive views of China in Japan were already low, hovering at around 10%.

A decade later — and years into a new AUKUS partnership, a revived Quad, and unprecedented trilateral cooperation — there is a steady convergence of US, Australian and Japanese assessments of the challenge posed by China and the need for closer alliance coordination. This trend has only solidified in this polling, the third trilateral public opinion poll taken by the United States Studies Centre.

When asked whether China is helpful or harmful in Asia, publics in the three countries answered mostly harmful (Australians 48%, Americans 44%, Japanese 51%), with only small minorities saying China is mostly helpful (Australians 18%, Americans 15%, Japanese 10%). When asked if China should be held to account for human rights abuses, most agreed (Australians 69%, Americans 69%, Japanese 56%), while similar levels agreed that democracy should be promoted as the best form of governance in Asia (Australians 72%, Americans 61%, Japanese 59%).

However, while there was broad convergence on the nature of the challenges to security in the Indo-Pacific and the need for common action, there were some areas of dissonance and uncertainty as well. Majorities in all three countries supported industrial policy for domestic manufacturing (Australians 62%, Americans 60%, Japanese 51%) even if that increases costs to consumers — a response to China’s economic shock but also a source of potential protectionist tension among allies. While publics in all three countries shared a common threat perception, they were hesitant to increase taxes to pay for more military capabilities (only Australians 31%, Americans 34%, Japanese 24% agree). And while a narrow majority of Australians continue to support AUKUS and outnumber those who oppose it (51% think it is a good idea for Australia to have nuclear powered submarines, compared to 19% who disagree), almost equal numbers are not sure whether AUKUS makes the region safer (47% either don’t know or neither agree nor disagree that ‘the AUKUS partnership makes Asia safer’).

The upcoming US elections continue to present a cloud over the convergence of thinking in the three countries, though less so than in previous polls. This year’s poll — which concluded in the field two days before the infamous US presidential debate on 27 June and nearly a month before Joe Biden decided to no longer seek re-election — does not delve as deep into the political issues at stake as much as it does the long-term dynamics affecting Australia, Japan, the United States and their respective alliances. Most notably, it found that only a small minority of Australian (26%) and Japanese respondents (13%) would want to withdraw from the US alliance if former president Trump wins a second term of office — a decrease from 37% of Australians in 2023. While the Trump factor appears to weigh less heavily in broad terms, Australians continue to be unsure about the future of AUKUS under a Trump presidency (46% say they don’t know or neither agree nor disagree with the statement that ‘If he is re-elected, Donald Trump will probably cancel the AUKUS partnership’).

Key findings

Our polling results suggest that concern about China and an alliance-centric orientation is now solidly entrenched in public opinion across Australia, the United States and Japan, though the uncertainty about US presidential politics, defence spending, or the future of AUKUS may be more transient. Much will depend on how leaders in all three countries make the case for policies and reassure their publics and their allies.

Methodology

Unless indicated otherwise, the polling data used in this report was derived from surveys conducted between 17 and 25 June 2024. These surveys were conducted by YouGov, a global public opinion and survey company, which fielded representative samples drawn from Australia, the United States and Japan. The surveys were administered online to adult, citizen populations with sample sizes of 1,013 in Australia, 1,072 in the United States and 1,029 in Japan. These surveys build on previous USSC surveys of representative Australian, US and Japanese samples in August 2023 and September 2022. Question wording was kept as consistent as possible to permit valid inferences about trends and changes over time.

The maximum margin of error is approximately 3.1% for the entire sample of respondents in each country. This is the 95% confidence interval for a 50% proportion. It is larger for the subsets of population (for instance, by vote and age). Figures 2, 3, 7, 8, 11 and 12 in this report polled a 50% sample for each population.

- 1** Australian and Japanese respondents increasingly think their US alliances should continue if Trump is re-elected, despite lingering concerns about a potential Trump victory
- 2** All three countries continue to be aligned on the 'China challenge' and support alliances with the United States, but Australians are more likely to say that the US handling of China is too aggressive
- 3** All three countries continue to prefer non-military responses to a Taiwan contingency, but just one in five Americans think that the Asia-Pacific should be the US Government's top regional priority
- 4** Support for AUKUS continues to outweigh opposition — but most are unsure about its future if Trump is re-elected
- 5** All three publics support more government intervention in manufacturing and new technologies like AI
- 6** All three publics view democracy as important at home and abroad, though Americans — and to a lesser extent, their allies — are concerned about the state of US democracy

Key findings

1

Australian and Japanese respondents increasingly think their US alliances should continue if Trump is re-elected, despite lingering concerns about a potential Trump victory

- A plurality of Australian (47%) and Japanese respondents (41%) continue to think that a second Trump presidency would be bad for their country, while only 19% of Australians and 12% of Japanese respondents said the same about a prospective second Biden term.
- Compared to 2023, Australians are now less likely to want to withdraw from the US alliance if former president Trump wins (26% in 2024, compared to 37% in 2023). A majority of Japanese respondents now oppose withdrawing from their US alliance if Trump is re-elected (52%, compared to 40% in 2023).
- A majority of Australian, American and Japanese respondents say they are concerned about what a second Trump term could mean for the state of democracy, civil rights and individual freedoms and political division in the United States (53–78% in each country are a little or very concerned).
- Two-thirds of Australians (67%) believe Trump should not be allowed to be president due to being convicted of a crime. This is lower among Japanese (53%) and US respondents (52%).

2

All three countries continue to be aligned on the ‘China challenge’ and support alliances with the United States, but Australians are more likely to say that US handling of China is too aggressive

- A majority of Australian (55%) and Japanese respondents (53%) continue to believe their alliance with the United States makes their country more secure.
- A majority of Americans continue to think their alliances with Australia (52%) and Japan (56%) make the United States more secure.
- Japanese respondents are more likely to value the role of the US in Asia than Australians and Americans, with 49% saying it is mostly helpful in Asia, compared to 35% of both Australians and Americans.
- Views of China’s role remain largely unchanged, with roughly half of respondents in all three countries (44–51%) saying that China is more harmful than helpful in Asia.
- Australians (20%) are twice as likely as Japanese (9%) and US respondents (10%) to say that US handling of China is too aggressive.
- Only small minorities (4–10%) of Australian, American and Japanese respondents feel their own country’s handling of China is too aggressive.

3

All three countries continue to prefer non-military responses to a Taiwan contingency, but just one in five Americans think that the Asia-Pacific should be the US Government’s top regional priority

- Compared to 2023, Australians demonstrate less willingness to send military forces to help the United States defend Taiwan in the event of an attack by China (32% disagree with doing so compared to 22% in 2023) while Japanese and US views on the issue have largely remained similar to prior years, with 33-40% of respondents in the 3 nations supporting sending military forces.
- Just 18% of Americans think that Asia should be the highest US Government regional priority, with the rest divided between the Middle East (32%), Europe (25%) and Latin America (18%).
- Only a quarter of Australians (25%) think that Asia is the US Government’s main focus, compared to a plurality of Japanese respondents (36%), though it is worth noting that regional prioritisation does change in US public opinion based on conflicts dominating the headlines, such as Gaza and Ukraine.

- Majorities in Australia, the United States and Japan (50–52%) believe that it would be damaging for their country if Russia defeats Ukraine.
- A plurality of Americans (44%) think their government is too distracted by foreign entanglements, like Ukraine. However, on this, as so many other issues, voters in the United States are highly divided along partisan lines. Just 29% of Democratic voters agree with this statement, compared with 61% of Republicans.

4

Support for AUKUS continues to outweigh opposition — but most are unsure about its future if Trump is re-elected

- Australian, American, and Japanese respondents are largely unsure if AUKUS would survive a second Trump presidency.
- Respondents in all three countries continue to be far more likely to say that the AUKUS partnership makes Asia safer than not.
- A majority of Australians (51%) continue to think that it is a good idea for Australia to have nuclear powered submarines (compared to 19% who disagree), even though most Australians (52%) continue to think that AUKUS locks Australia into supporting the United States in a conflict.
- Australians are far more likely to think AUKUS is good for creating jobs in Australia than not (42% agree compared to 12% disagree), although a plurality appear unsure (44% either don't know or neither agree nor disagree).
- A plurality of Australians (39%) think that AUKUS is not worth the cost to Australian taxpayers, while 37% appear unsure (don't know or neither agree nor disagree) and only 25% disagree.
- However, spending on defence has not increased in popularity in any of the three countries. Pluralities in each country continue to oppose introducing additional taxes to boost their country's military competitiveness with China (46–54%).

5

All three publics support more government intervention in manufacturing and new technologies like AI

- A majority in all three countries (51–62%) want to prioritise domestic manufacturing, even if it would cause higher consumer costs.
- A vast majority of Australian (73%) and American respondents (62%) do not want to import renewable technology produced with forced labour.
- Most Australians (67%) and Americans (59%) want to prioritise AI regulation over innovation, while Japanese respondents are divided (33% favour regulation; 28% prefer innovation).
- A majority of Australians (51%) want to outlaw disinformation even if it impacts freedom of speech — compared to a third of American (34%) and Japanese respondents (29%).

6

All three publics view democracy as important at home and abroad, though Americans — and to a lesser extent, their allies — are concerned about the state of US democracy

- All three publics share an overwhelmingly positive view of the merits of democracy as the preferred form of government (each between 80–90%).
- Large majorities in each country agree with helping developing countries in Asia to hold democratic elections (61–73%) and promoting democracy as the best form of governance in Asia (59–72%).
- All three publics (56–69%) want to hold China to account on human rights abuses, even if it hurts domestic businesses.
- Americans (81%) remain deeply concerned about the state of US democracy, albeit more than Australian (74%) and Japanese (54%) respondents.

Key finding 1

Australian and Japanese respondents increasingly think their US alliances should continue if Trump is re-elected, despite lingering concerns about a potential Trump victory

As the election draws closer, **Australians are now less likely to want to withdraw from the US alliance if Trump wins**. In 2023, United States Studies Centre (USSC) polling found that 37% of Australians supported withdrawing from the Australia-US alliance if Trump returns to the White House. Yet in 2024, **only a quarter of Australians (26%) want to withdraw from the Australia-US alliance if Trump wins** — an 11 percentage point decline in one year. Japanese support for their US alliance also remains high under a Trump presidency, with just 13% wanting to withdraw if Trump is re-elected. A majority of respondents (52%) now oppose withdrawing from their US alliance if Trump is re-elected (52% disagree, compared to 40% in 2023).

Australian, American, and Japanese respondents express deep concern about the implications of a second Trump term for US standing at home and abroad. Asked to imagine a second Trump term, a striking number of Australians say they would be very concerned about the state of US democracy (46%), civil rights and individual freedoms (44%), political division (51%) and an outbreak of international conflicts (47%) under his leadership. While

Japanese respondents demonstrate less concern than their Australian counterparts, they echo this sentiment — only 8–17% of respondents say they are not at all concerned about these issues under a second Trump term.

A plurality of Australians (47%) continue to think that a second Trump presidency would be bad for their country. Similarly, a plurality (41%) of Japanese respondents think a second Trump term would be bad for Japan, with just 10% saying it would be good for their country. Against the backdrop of Trump’s historic criminal trials, **two-thirds (67%) of Australians believe Trump should not be allowed to be president because he was convicted of a crime**. While Labor voters are more likely than Coalition voters to agree that Trump should be disqualified (82% compared to 58%), the issue is far more politically polarised in the United States. Among Americans, just a fraction (8%) of 2020 Trump voters agree that Trump should be barred from the presidency due to his criminal conviction, compared to the vast majority of Democratic voters (87%).

Figure 1. Australian and Japanese respondents are now less likely to want to withdraw from the US alliance if Trump wins

**How much do you agree or disagree with your country doing the following?
Withdrawing from the US alliance if Donald Trump is re-elected**

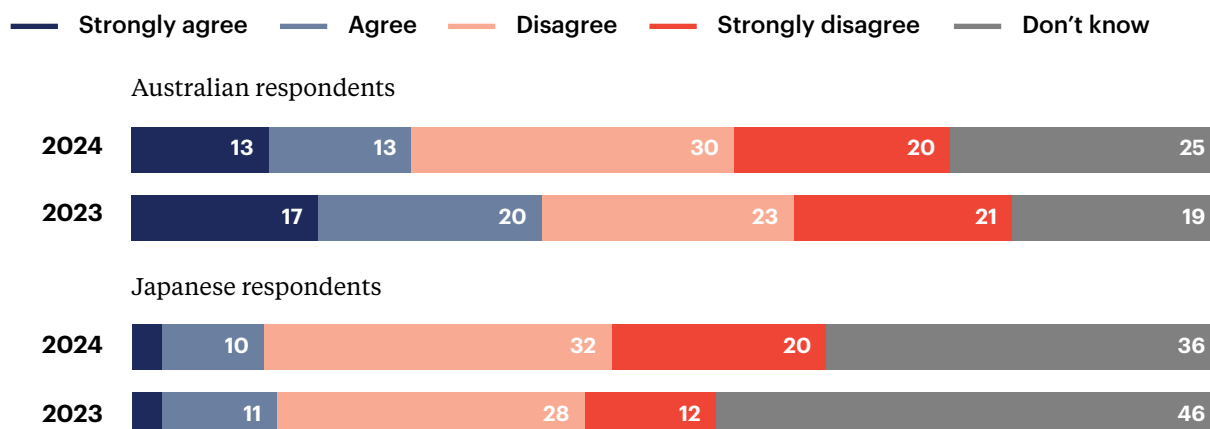


Figure 2. Two-thirds of Australians believe Trump should not be allowed to be president because he was convicted of a crime

Because Donald Trump has been convicted of a crime, he should not be allowed to be US president

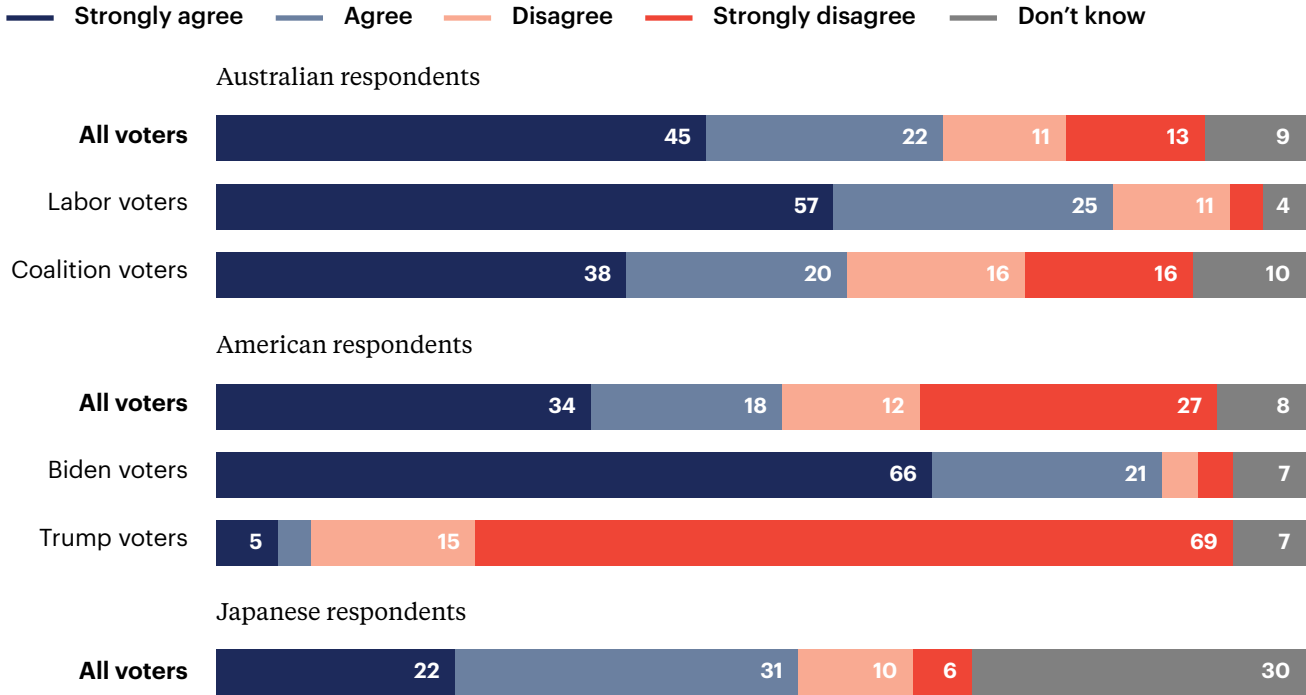


Figure 3. A plurality of Australians and Japanese respondents continue to think that a second Trump presidency would be bad for their country

If Donald Trump wins a second term as president in 2024 would that be good or bad for your country?

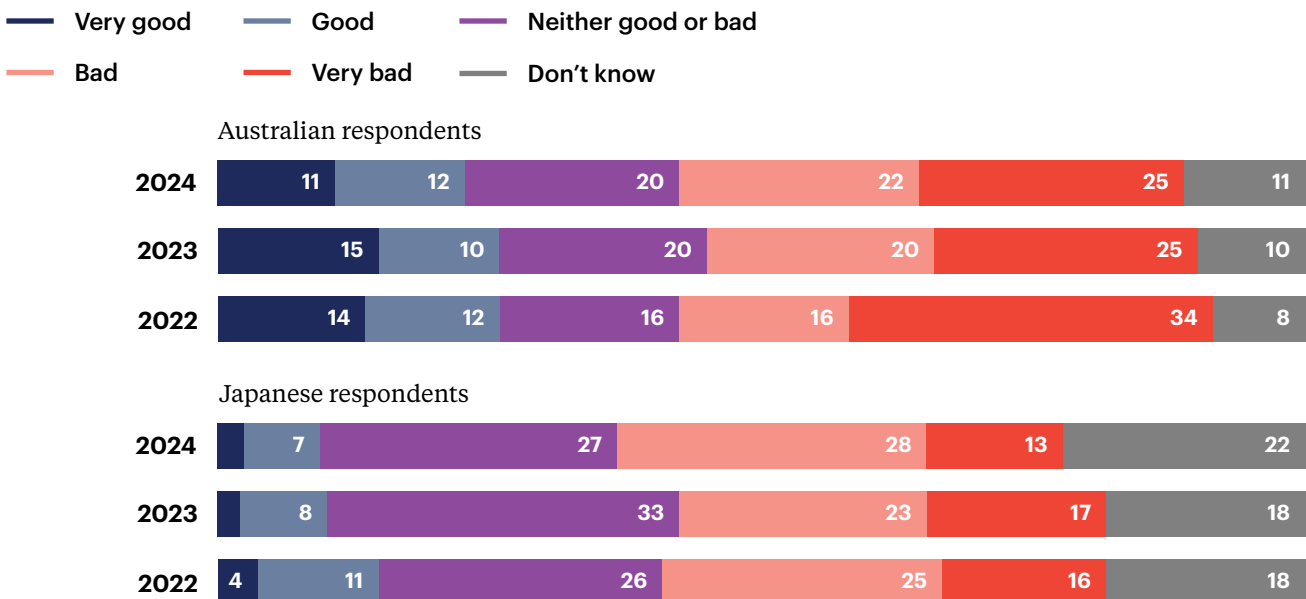
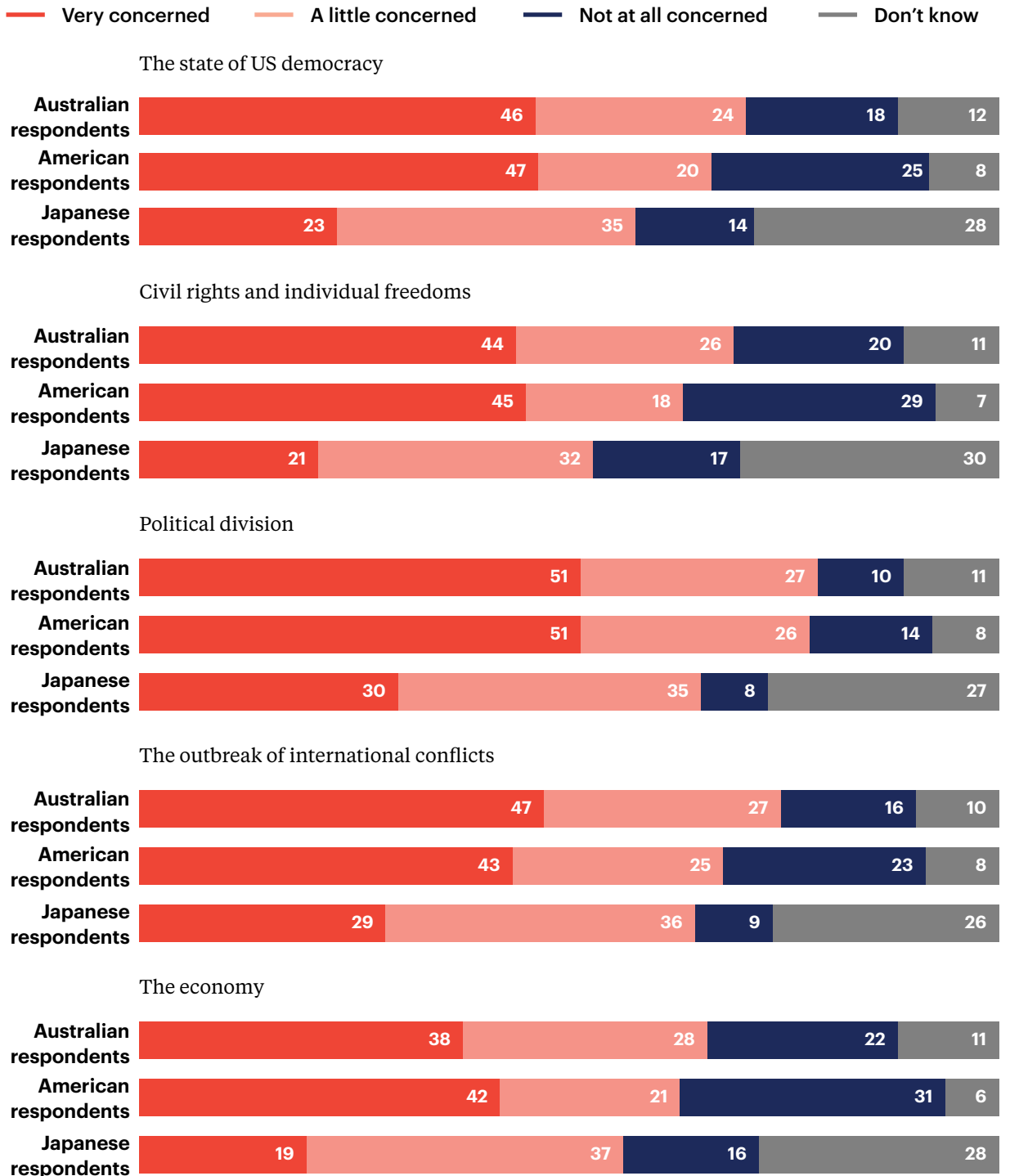


Figure 4. Australian, American, and Japanese respondents demonstrate deep concern about the implications of a second Trump term for US standing at home and abroad

In a second Donald Trump term, how concerned would you be about the following in the United States?



*The number of Australians who say they would be very concerned over the state of US democracy, political division, and civil rights and individual freedoms increased by an average of 20 points as compared to a hypothetical second Biden term. While Japanese respondents demonstrate less concern than their Australian counterparts, they echo this sentiment — deep concern about these US domestic issues was twice as high under a hypothetical second Trump term compared to a Biden one.

Key finding 2

All three countries continue to be aligned on the ‘China challenge’ and support alliances with the United States, but Australians are more likely to say that US handling of China is too aggressive

A majority in Australia (55%) and Japan (53%) continue to say that their alliance with the United States makes their country more secure. Only a small minority of Australians (16%) and Japanese respondents (9%) think their US alliance makes their country less secure — though among Australians this sentiment has risen by 5% since 2023.

Americans continue to think that US alliances make the United States more secure. Majorities of Americans say various alliances make the United States more secure: Australia (52%), Japan (56%), NATO countries (54%) and South Korea (51%). This represents a continuation of the last two years of polling, with almost no change from 2023. Fewer than 10% think these relationships make the United States less secure.

Japanese respondents continue to hold the most positive view of the US role in Asia, with half (49%) saying the United States is mostly helpful (compared to 7% who say it is mostly harmful), higher than 35% of Australians (up six percentage points since 2023) and Americans themselves (35%). Only 7% of Japanese respondents think that the United States is mostly harmful in Asia, a view which is twice as popular among Americans (14%), and three times as popular in Australia (21%). Views of China’s role remain largely unchanged, with roughly half of respondents in all three publics saying that China is more harmful than helpful in Asia.

While only one in five Australians think that US handling of China is too aggressive, Australians are twice as likely as Japanese (9%) and American (10%) respondents to say so. When it comes to their own country’s handling of China, Australians are split between finding it too weak (37%) and appropriate (37%). Only 7% say that Australia’s handling of China is too aggressive. Japanese respondents overwhelmingly think their government’s handling of China is too weak (55%), and a small minority of 4% find it too aggressive.

While only one in five Australians think that US handling of China is too aggressive, Australians are twice as likely as Japanese and US respondents to say so.

Figure 5. A majority of Australian and Japanese respondents continue to say that their alliance with the United States makes their country more secure

Does your alliance with the United States make your country more or less secure?

More secure Makes no difference Less secure Don't know

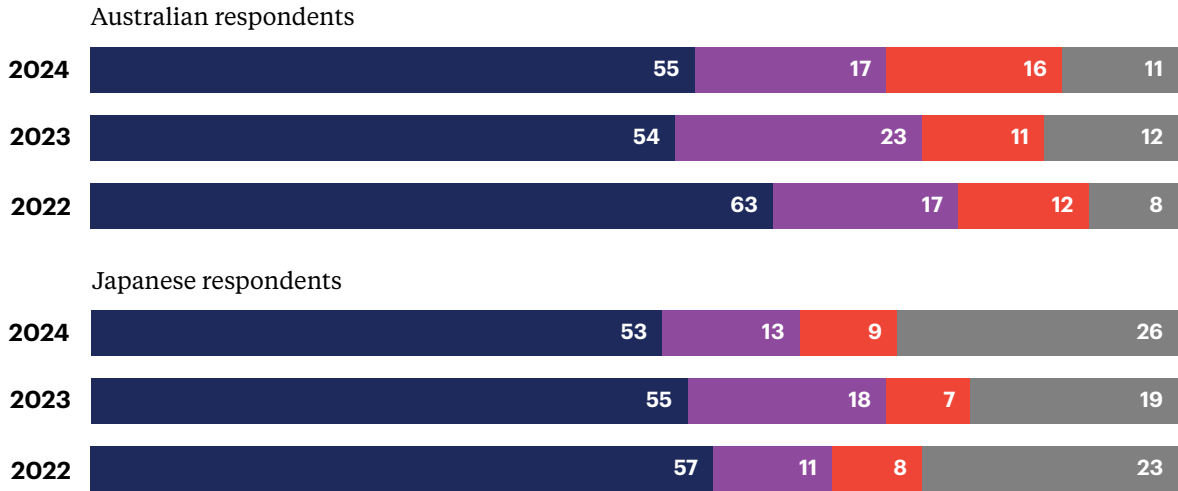


Figure 6. Americans continue to think that US alliances make the United States more secure

Do the US military alliances with the following countries make the United States more secure?

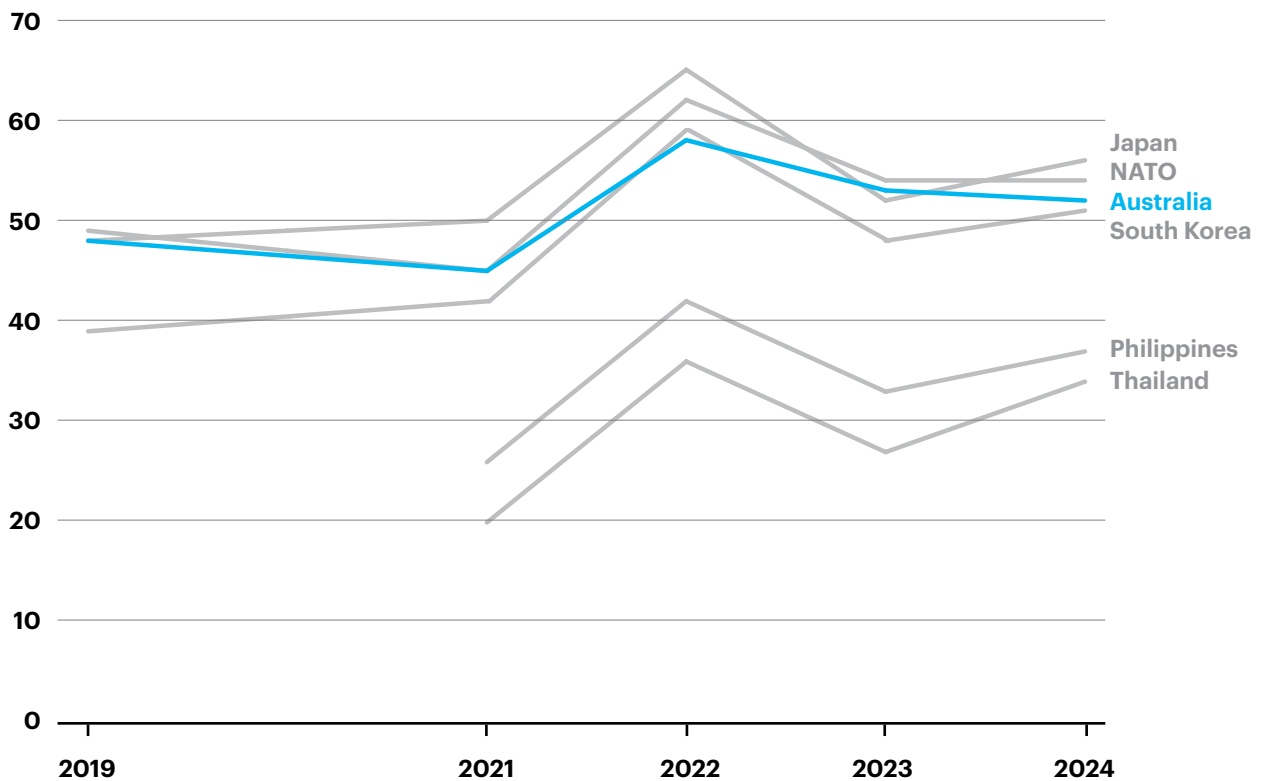
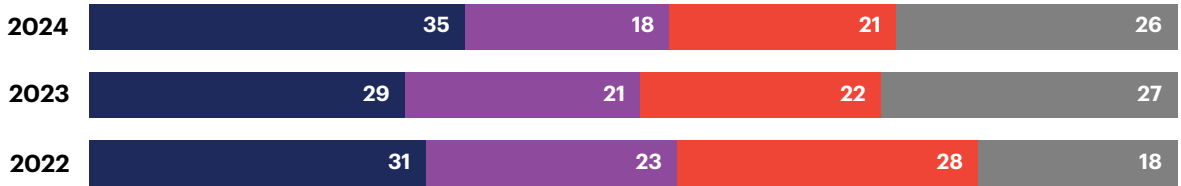


Figure 7. Japanese respondents continue to hold the most positive view of the US role in Asia

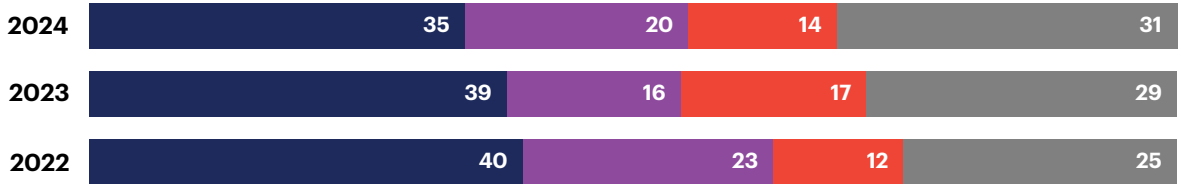
Is the United States more helpful or harmful in Asia?

— Mostly helpful — Makes no difference — Mostly harmful — Don't know

Australian respondents



American respondents



Japanese respondents

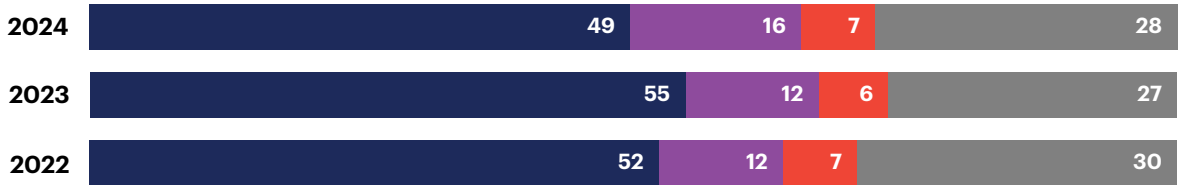


Figure 8. Views of China's role remain largely unchanged, with roughly half of respondents in all three publics saying that China is more harmful than helpful in Asia

Is China more helpful or harmful in Asia?

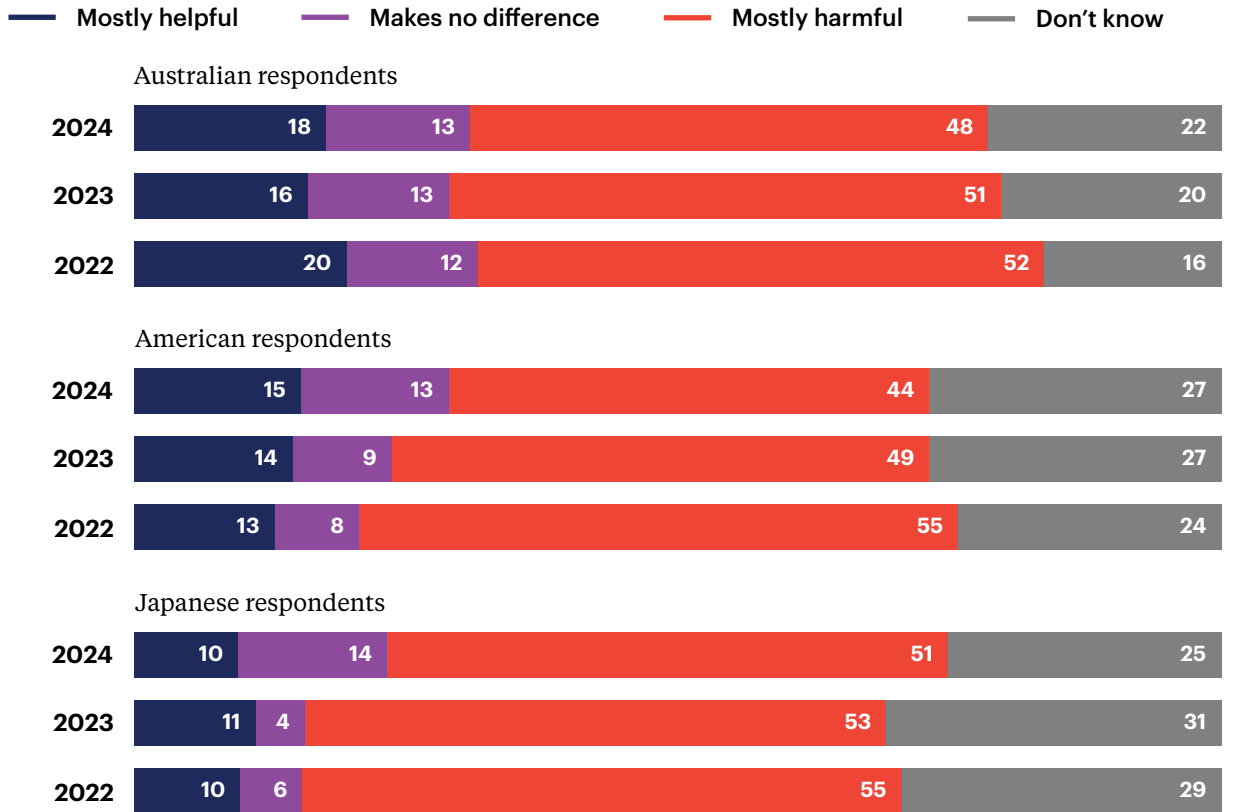


Figure 9. Australians are twice as likely as Japanese and American respondents to say that US handling of China is too aggressive

The way the United States is handling China is...



Figure 10. Only small minorities of Australian, American and Japanese respondents feel their country's handling of China is too aggressive

The way your country is handling China is...



Key finding 3

All three countries continue to prefer non-military responses to a Taiwan contingency, but only one in five Americans think that the Asia-Pacific should be the US Government's top regional priority

Taiwan remains a regional flashpoint of key concern. Respondents in all three countries continue to prefer non-military responses to a hypothetical Chinese invasion of Taiwan — yet in Australia support for economically isolating China in the event of an attack has decreased from 60% in 2023 to 52% in 2024.

Compared to 2023, Australians demonstrate less willingness to send military forces to help the United States defend Taiwan in the event of an attack by China. The number of Australians who agree with doing so has dropped by six percentage points since 2023 (46% to 40%), while those who disagree rose by a sizeable ten percentage points — now sitting at 32%. Similarly, more Americans now disagree with sending US military forces to defend Taiwan (a five percentage point increase since 2023), with Americans almost evenly split between agreeing (33%), disagreeing (31%) and being uncertain (36%) about doing so. By contrast, in Japan, support for sending military forces to defend Taiwan increased by eight percentage points since 2023 — to 34% up from 26% in 2023.

When it comes to the US Government's regional priorities, Americans and Australians believe that the United States is focused more on the Middle East than it is on Asia. Half of Australians (50%) think that the United States is prioritising the Middle East, with the rest split between Europe (22%) and Asia (25%). Similarly, roughly half of Americans (47%) think that the US Government is prioritising

the Middle East. Yet, Americans are also more likely to say that Europe (30%) is a higher priority for their government compared to Asia (13%). By contrast, Japanese respondents are half as likely (23%) to think the Middle East is the US Government's top priority, with a plurality of 36% saying that Asia is receiving the most US attention. It is worth noting that regional prioritisation does change in American public opinion based on what conflicts dominate the headlines, and there is no doubt that Gaza and Ukraine were doing that when the poll was conducted.

Yet, while most Americans think their government is prioritising the Middle East, they are more divided on the question of which region their government should be directing most attention to. Despite China's prominence in public policy discussions in the United States, only 18% of Americans think that Asia should be the highest US Government priority, with the rest divided between the Middle East (32%), Europe (25%) and Latin America (18%).

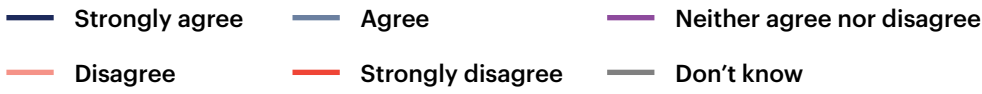
Turning to Europe, majorities in Australia, the United States and Japan believe it would be damaging for their country if Russia defeats Ukraine, with less than 15% disagreeing. Respondents in all three publics generally agree that the United States should continue providing Ukraine with arms and diplomatic support, with almost two-thirds of Australians (65%) saying so, compared to 48% of Americans and 46% of Japanese respondents. A quarter of Americans (26%) believe that US aid to Ukraine should end, twice as many compared to Australians (12%) and Japanese respondents (12%).

Australians are much more supportive of the US military directly intervening in Ukraine than Americans themselves (28% of Australians compared to 16% of Americans). A majority of Americans (51%) actively disagree with US intervention, considerably higher than opposition in Australia (38%) and Japan (33%). Strikingly, almost half of Americans (44%) think the US Government is too distracted by foreign entanglements like Ukraine.

Americans and Australians believe that the United States is focused more on the Middle East than it is on Asia

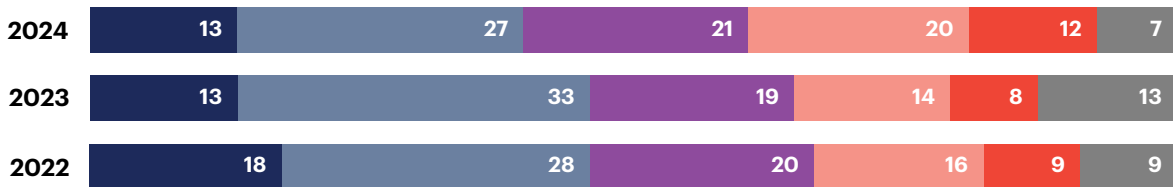
Figure 11. Compared to 2023, Australians demonstrate less willingness to send military forces to help the United States defend Taiwan in the event of an attack by China

If China attacks Taiwan, how much do you agree or disagree with your country responding in the following ways:

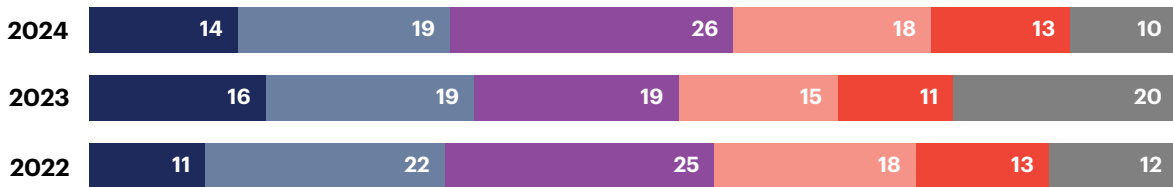


Sending military forces to help the United States defend Taiwan

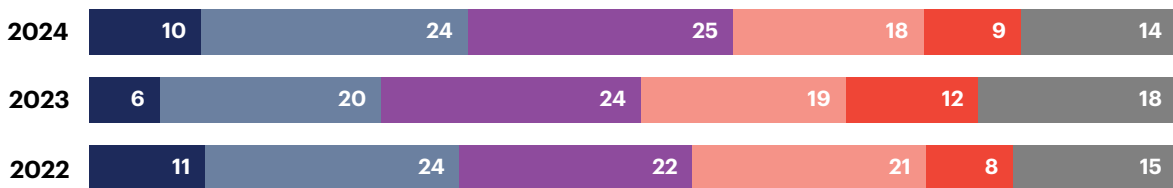
Australian respondents



American respondents

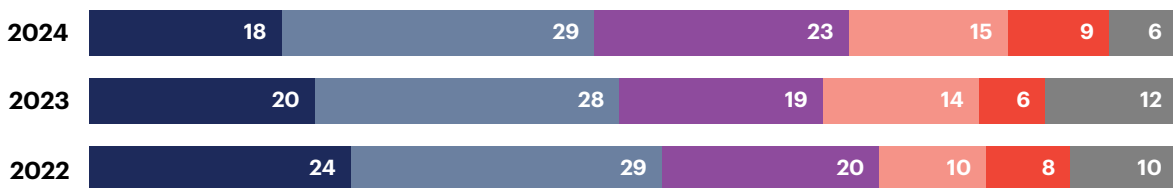


Japanese respondents

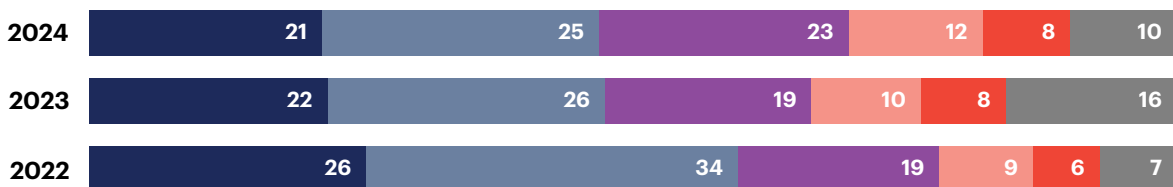


Providing Taiwan with weapons

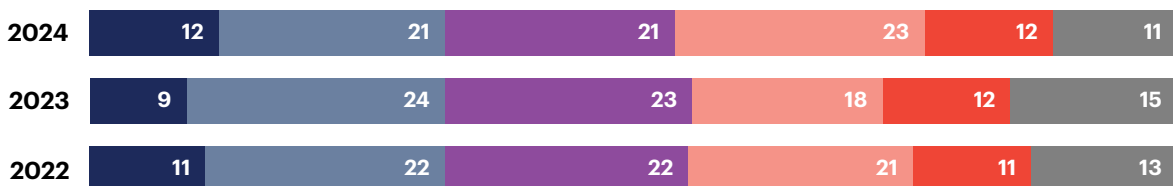
Australian respondents



American respondents



Japanese respondents



If China attacks Taiwan, how much do you agree or disagree with your country responding in the following ways:

■ Strongly agree
 ■ Agree
 ■ Neither agree nor disagree
■ Disagree
 ■ Strongly disagree
 ■ Don't know

Economically isolating China

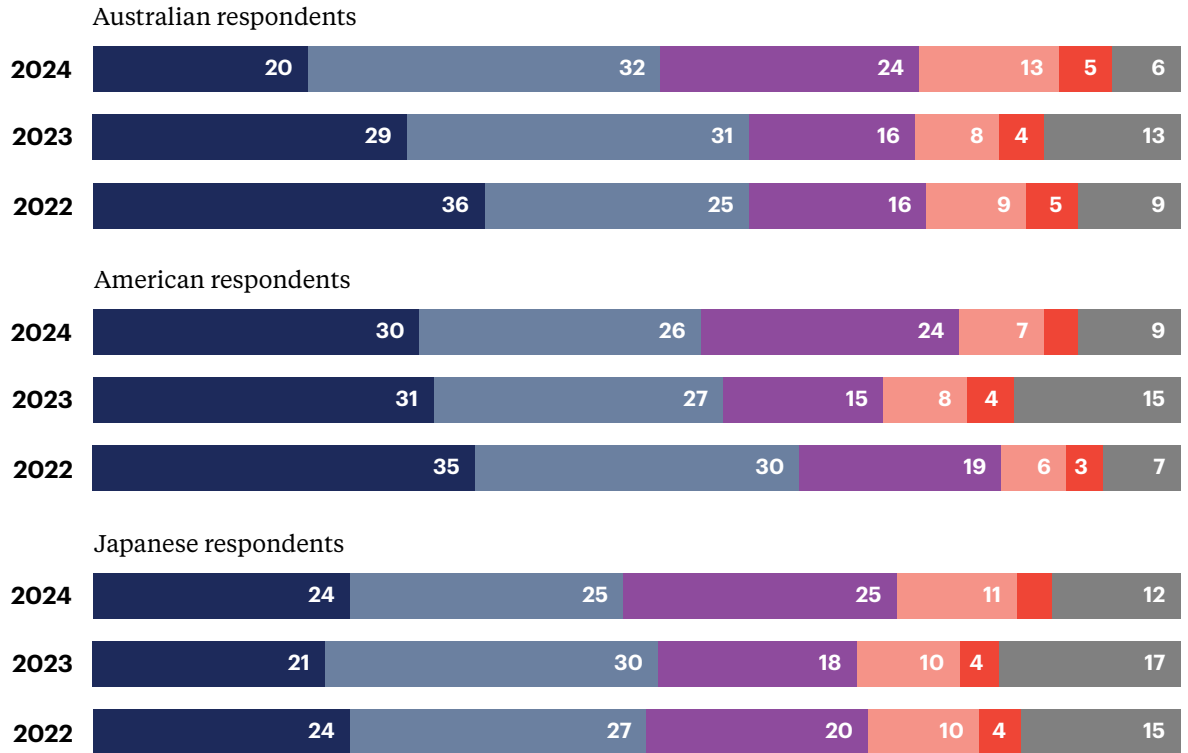
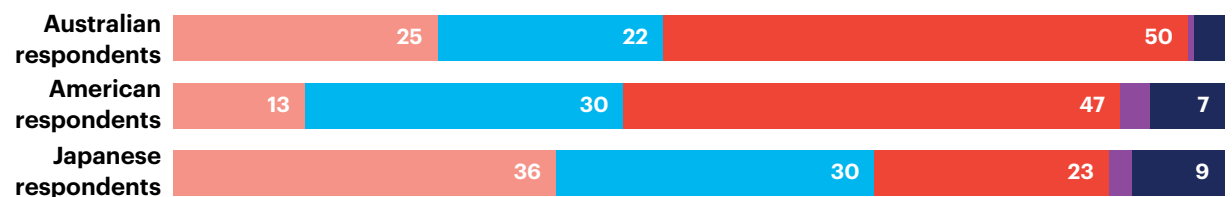
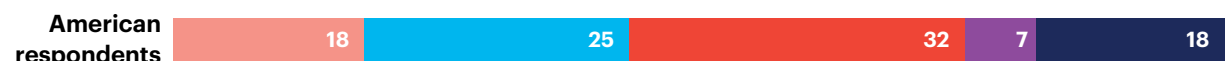


Figure 12. Only 18% of Americans think that Asia should be the highest US Government priority

Which of the following regions do you think the US Government is prioritising the most?



Which of the following regions should be the highest priority of the US Government?



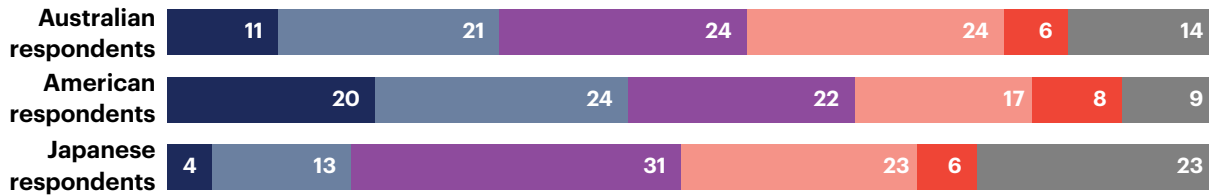
■ Asia-Pacific
 ■ Europe
 ■ The Middle East
 ■ Africa
 ■ Latin America

Figure 13. A majority in Australia, the United States and Japan believe that it would be damaging for their country if Russia defeats Ukraine

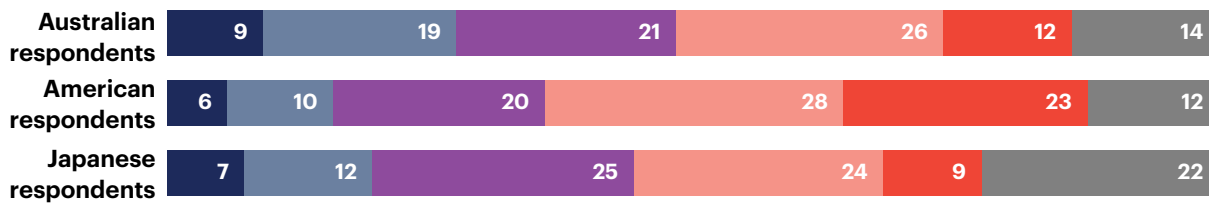
Thinking about Russia’s invasion of Ukraine in 2022, do you agree or disagree with the following statements?

■ Strongly agree
 ■ Agree
 ■ Neither agree nor disagree
■ Disagree
 ■ Strongly disagree
 ■ Don’t know

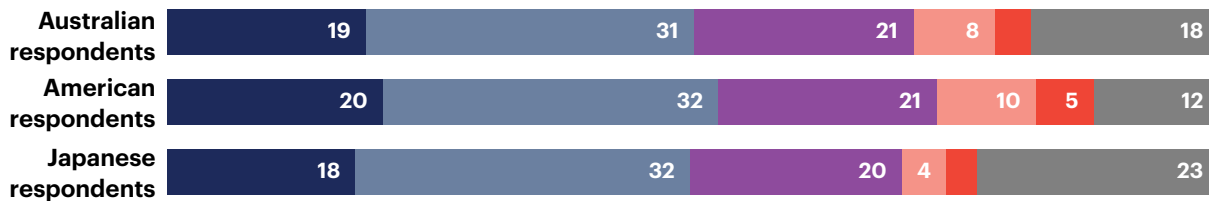
The US Government is too distracted by foreign entanglements like Ukraine



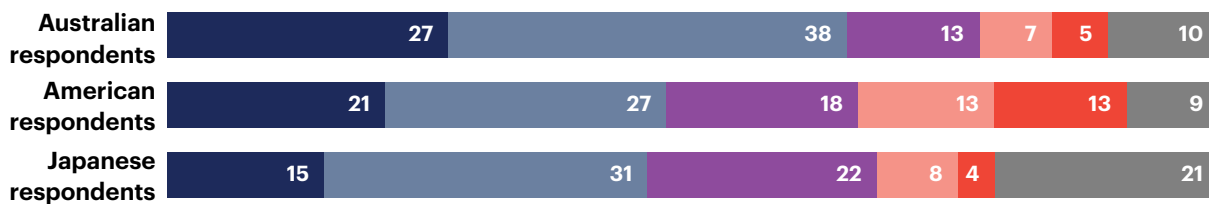
The US military should intervene directly in Ukraine



It would be damaging for your country if Russia defeats Ukraine



The United States should continue to support Ukraine with arms and diplomacy



Key finding 4

Support for AUKUS continues to outweigh opposition — but most are unsure about its future if Trump is re-elected

As was the case in 2023, respondents in all three countries are far more likely to say that the AUKUS partnership makes Asia safer than not. Just 12% of Australians, 8% of Japanese respondents and 6% of Americans think that AUKUS does not make Asia safer. However, Australians demonstrate more uncertainty about the partnership's regional impact compared to previous polling, with 47% now saying they neither agree nor disagree or don't know, compared to 42% in 2023.

While significantly more American (57%) and Japanese (59%) respondents say they don't know whether AUKUS makes Asia safer, six times as many Americans and three times as many Japanese respondents agree that the partnership makes Asia safer compared to those that disagree.

A plurality of Australians continue to think that AUKUS isn't worth the price tag (39%) and a majority (52%) say that AUKUS locks Australia into supporting the United States in an armed conflict — an increase of five percentage points since 2023.

Yet, a majority of Australians (51%) also now believe it is a good idea for Australia to have nuclear-powered submarines. Only a minority of respondents in each country disagree that Australia acquiring nuclear-powered submarines is a good idea, although American support has declined by four percentage points since 2023 (39% to 35%). In Australia, a plurality of respondents still hold the view that AUKUS is good for creating jobs in Australia (42%). Although, while Australians are far more likely to think AUKUS is good for creating jobs in Australia than not (42% agree compared to 12% disagree), a plurality appear unsure (44% either don't know or neither agree nor disagree).

As was the case in 2023, Coalition voters are more supportive of AUKUS than Labor voters. While 66% of Coalition voters say it is a good idea for Australia to have nuclear-powered submarines, only 50% of Labor voters say the same. Fifty-five per cent of Coalition voters say that AUKUS makes Asia safer, compared to 42% of Labor voters. Additionally, 27% of Coalition voters say that AUKUS submarines are not worth the cost, compared to 46% of Labor voters.

A majority of Australians (53%) also continue to think that AUKUS should be expanded to include Japan. However, less than a third of Japanese respondents share this sentiment (29%), as was the case in 2023. Americans remain split between saying they are unsure about the prospect of Japan's inclusion in AUKUS (49% neither agree nor disagree or don't know) or are supportive (44%), with only a minority disagreeing with doing so (8%).

Yet, all three publics appear to be unsure of AUKUS' future if Donald Trump is re-elected in November. Only 18% of Australians are confident that AUKUS would not be cancelled by a second Trump administration. Twice as many (36%) believe that Trump would cancel the AUKUS partnership, though a plurality of Australians are unsure (46%), as are the majority of American (51%) and Japanese (64%) respondents. In Australia, nearly half of Labor voters (46%) believe Trump is likely to cancel the partnership, compared to 30% of Coalition voters. Among US respondents, this partisan split is more acute. While most 2020 Biden voters (52%) believe Trump would cancel AUKUS, just 13% of 2020 Trump voters agree.

However, spending on defence has not increased in popularity in any of the three countries. Like in 2023, there continues to be far less support for introducing additional taxes to boost each country's military competitiveness with China. Just 31% of Australians agree with doing so, a decline of five percentage points since 2023. A majority of Australians (52%) disagree with introducing additional taxes to compete with China, mirroring sentiment in Japan (54%), and the United States (46%).

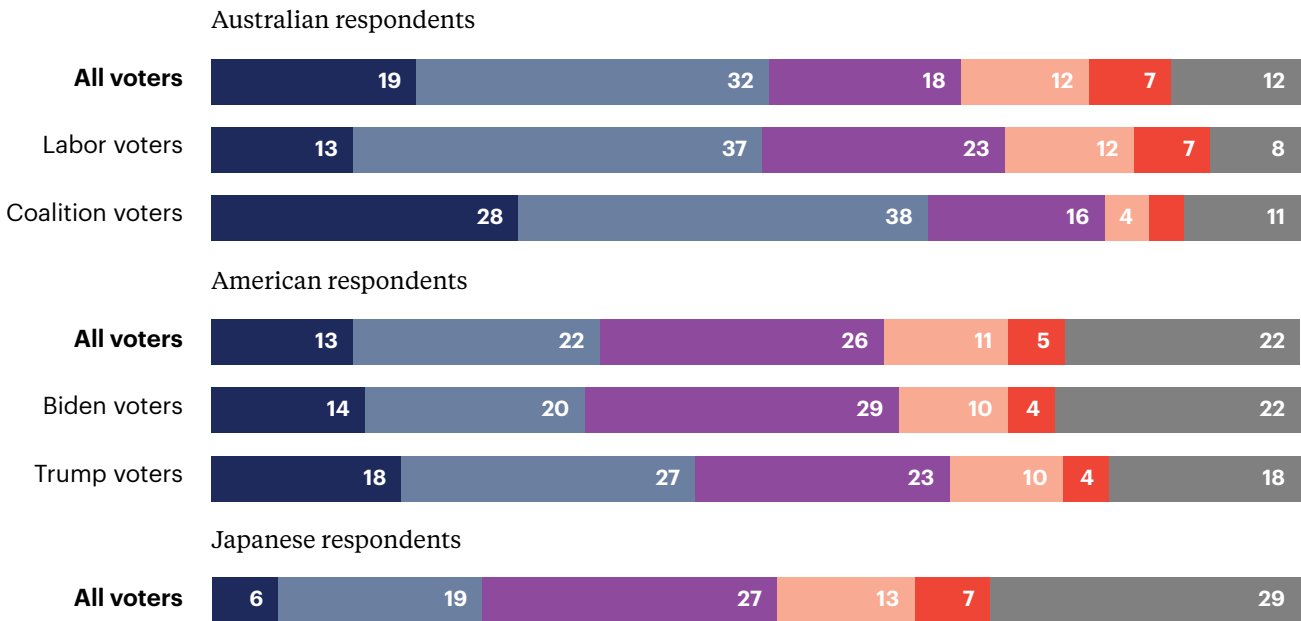
Coalition voters are more supportive of AUKUS than Labor voters.

Figure 14. Respondents in all three countries continue to be far more likely to say that the AUKUS partnership makes Asia safer than not

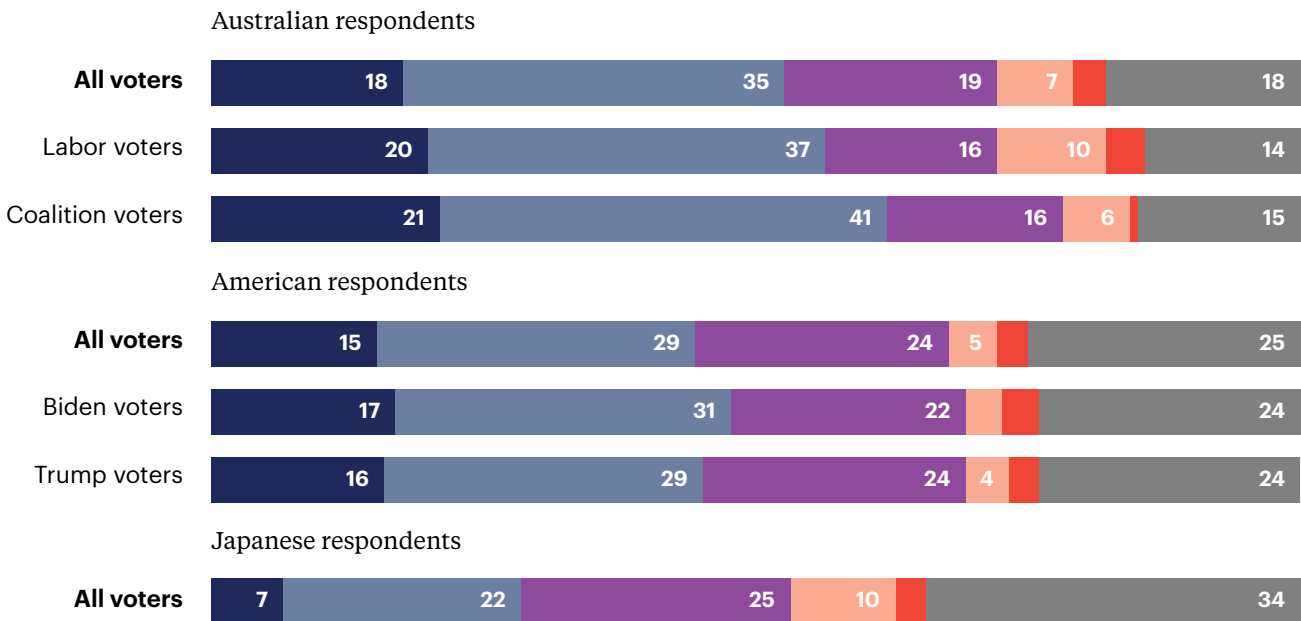
Do you agree or disagree with the following statements about AUKUS?

■ Strongly agree
 ■ Agree
 ■ Neither agree nor disagree
■ Disagree
 ■ Strongly disagree
 ■ Don't know

It is a good idea for Australia to have nuclear-powered submarines



The AUKUS partnership should be expanded to include Japan



The AUKUS partnership makes Asia safer

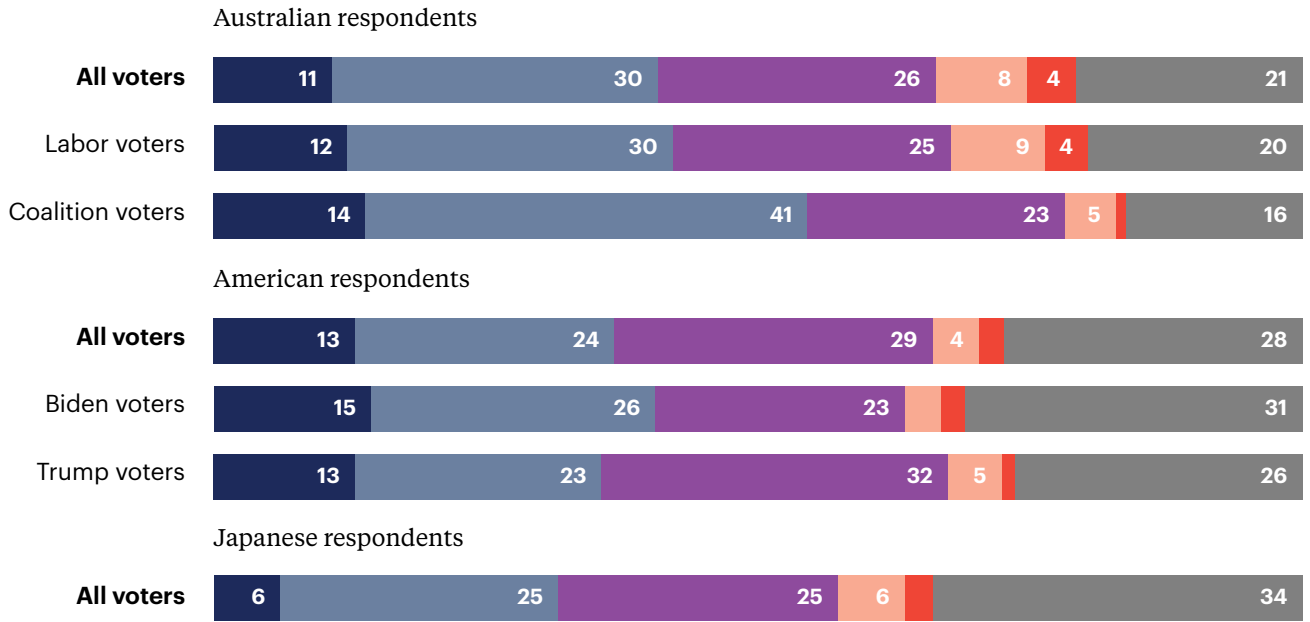
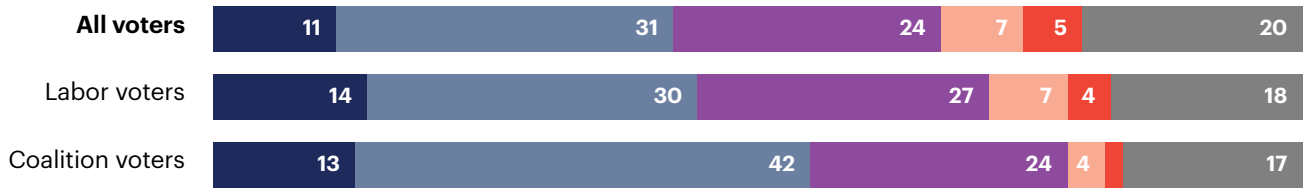


Figure 15. Australians continue to see AUKUS as good for creating jobs, even if they think it locks Australia into supporting the United States in a conflict and is not worth the price tag

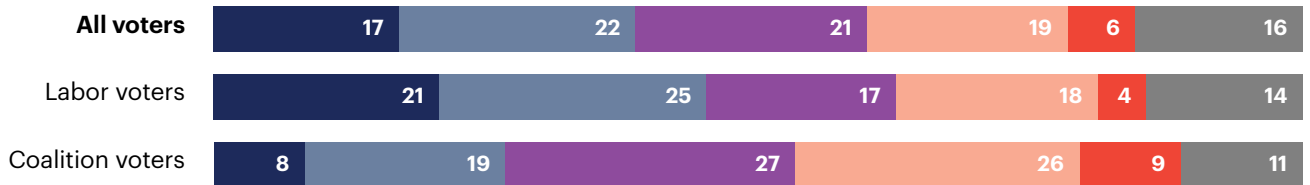
Australians were asked: Do you agree or disagree with the following statements about AUKUS?



AUKUS is good for creating jobs in Australia



AUKUS submarines are not worth the cost for Australian taxpayers



AUKUS locks Australia into supporting the United States in an armed conflict

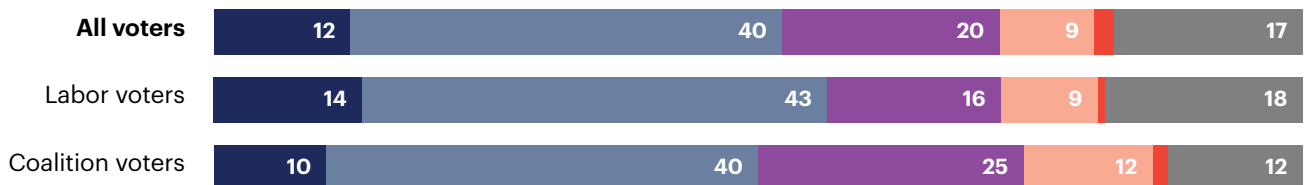


Figure 16. A majority of Australian, American, and Japanese respondents are unsure if AUKUS would survive a second Trump presidency

Do you agree or disagree with the following statements about AUKUS?

■ Strongly agree
 ■ Agree
 ■ Neither agree nor disagree
■ Disagree
 ■ Strongly disagree
 ■ Don't know

If he is re-elected, Donald Trump will probably cancel the AUKUS partnership

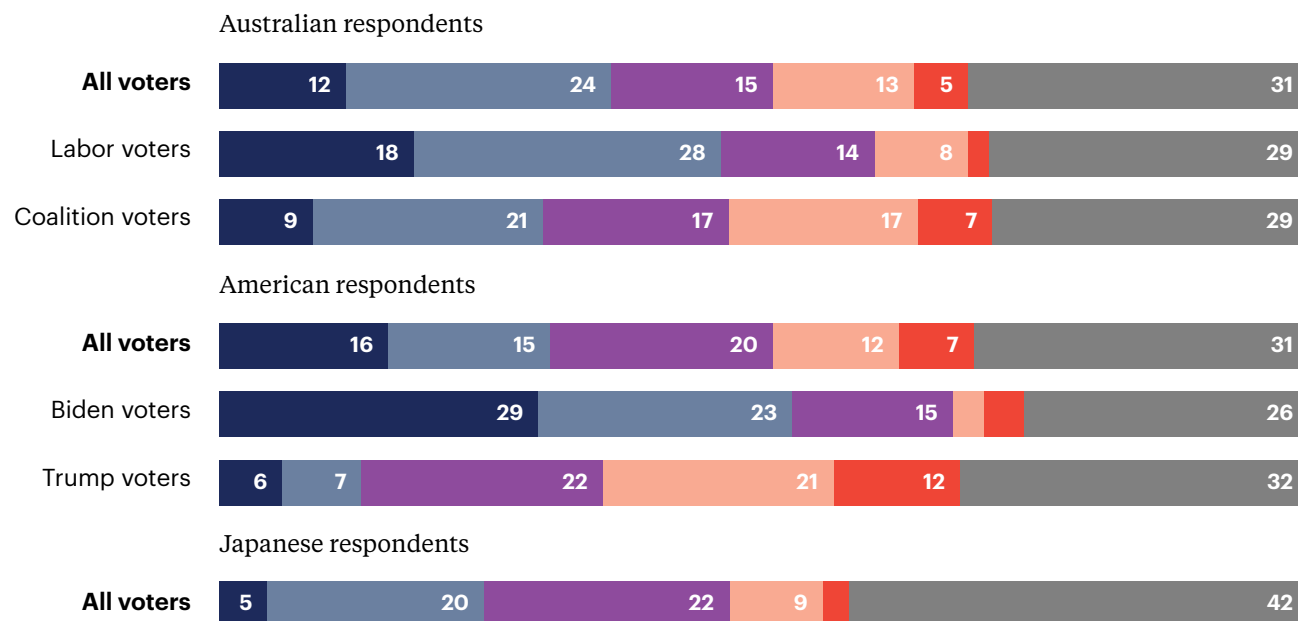
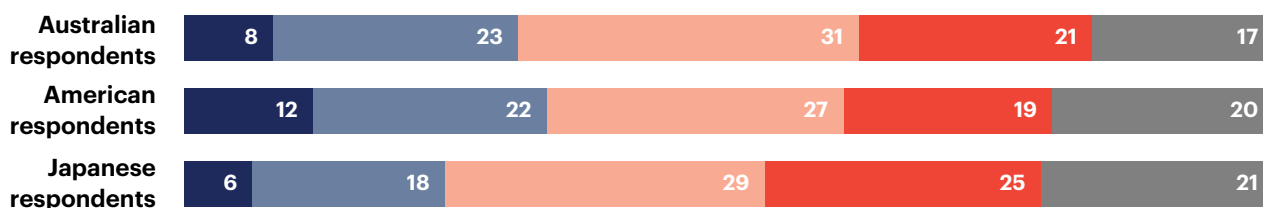


Figure 17. There continues to be limited support for introducing additional taxes to boost each country's military competitiveness with China

How much do you agree or disagree with your country introducing additional taxes to make your military more competitive with China's military?

■ Strongly agree
 ■ Agree
 ■ Disagree
 ■ Strongly disagree
 ■ Don't know



Key finding 5

All three publics support more government intervention in manufacturing and new technologies like AI

A clear majority of Australians (62%) say they want to prioritise domestic manufacturing to support local jobs, even if it would cause higher costs for consumers. Six in ten Americans and five in ten Japanese respondents agree. Just 26% of Australians, 22% of Americans and 16% of Japanese respondents want to prioritise free trade instead. Similarly, around half (47%) of Americans and Australians say they only want to use domestically made renewable technologies, though Japanese respondents are less likely to agree (32%).

When it comes to artificial intelligence, Australians (67%) and Americans (59%) overwhelmingly want to prioritise the regulation of AI to ensure it can be trusted, even at the cost of global leadership in AI innovation. Japanese respondents are divided, with 33% favouring regulation compared to 28% preferring innovation, and almost 40% saying that they are unsure.

Disinformation continues to be a key challenge facing democracies worldwide. A majority of Australians (51%) want to outlaw disinformation even if it impacts freedom of speech, compared to just a third of Americans (34%) and Japanese respondents (29%). Australians also lead in their support for punishing social media and technology companies which do not do enough to stop the spread of disinformation. Almost three-quarters of Australians (69%) support doing so compared to half of Americans (49%) and 40% of Japanese respondents, who demonstrate more uncertainty (51% neither agree nor disagree or do not know).

Very few in all three publics want to leave the problem of disinformation up to social media and technology companies to manage themselves. Australians are most against the prospect (56% disagree), followed by Americans (41% disagree). While 30% of Japanese respondents disagree with leaving social media and technology companies to manage the problem of disinformation themselves, they are overwhelmingly uncertain about the issue (51% say that they neither agree nor disagree or do not know).

Respondents in all three countries are remarkably aligned on standing up for human rights in supply chains. Only small minorities in all three countries support importing renewable technologies if they are made with forced labour — just 6% of Australians, 10% of Americans and 8% of Japanese respondents. Australians are the strongest opponents of importing renewable technology that is produced with forced labour, with 73% disagreeing with doing so, followed by 62% of Americans and 48% of Japanese who share the same view.

A clear majority of Australians say they want to prioritise domestic manufacturing to support local jobs, even if it would cause higher costs for consumers.

Figure 18. A majority in all three countries want to prioritise domestic manufacturing, even if it would cause higher consumer costs

Thinking of trade and domestic manufacturing, should each country:

- Prioritise domestic manufacturing, even if goods are more expensive
- Prioritise free trade, even if it means fewer jobs
- Don't know

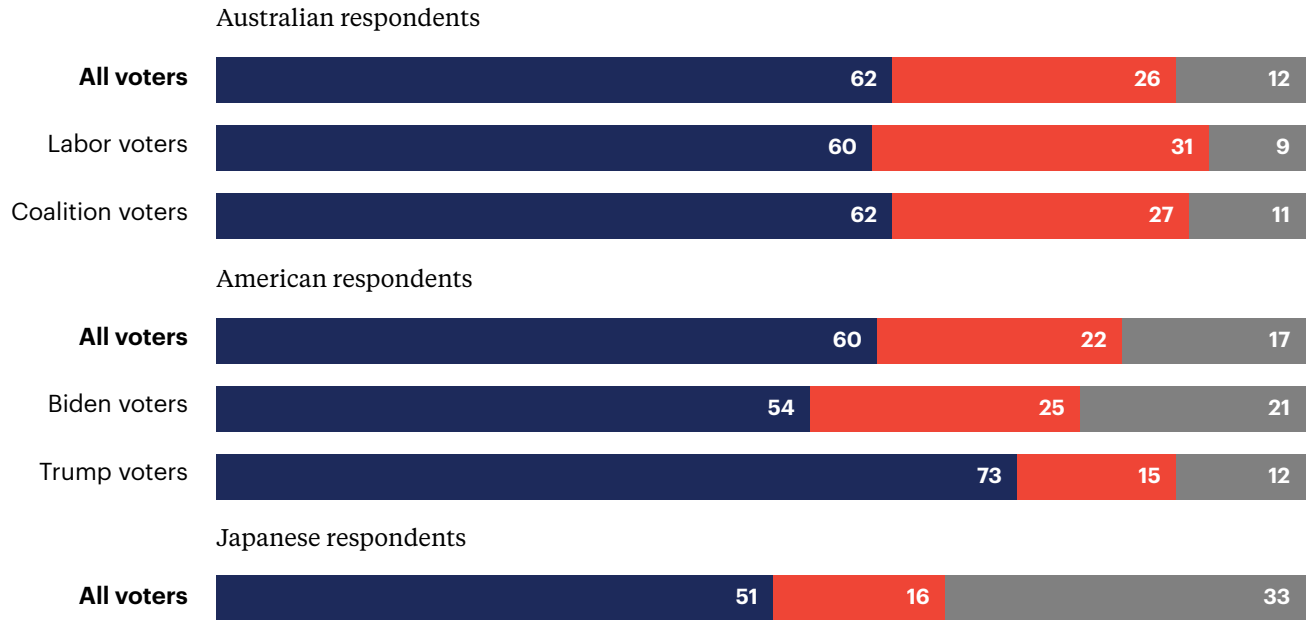
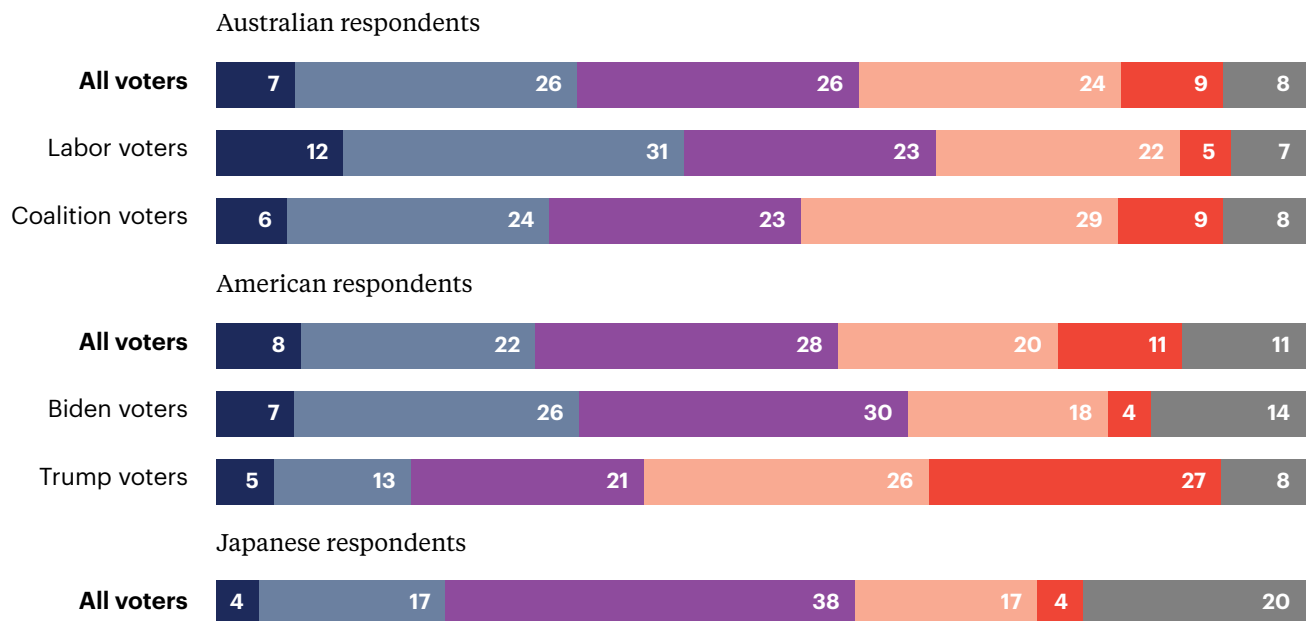


Figure 19. A vast majority of Australian and US respondents do not want to import renewable technology produced with forced labour

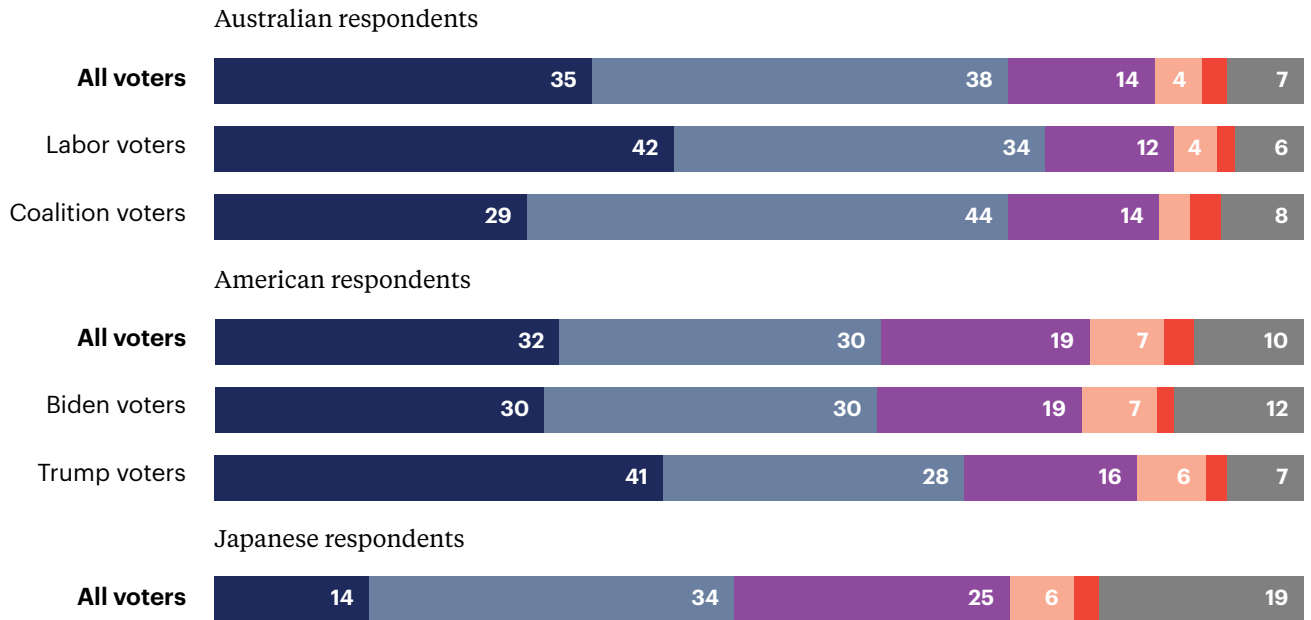
Thinking of renewable technologies like solar panels, electric vehicles and batteries, how much do you agree or disagree with doing the following?

- Strongly agree
- Agree
- Neither agree nor disagree
- Disagree
- Strongly disagree
- Don't know

Importing renewable technologies from any country



Not importing renewable technologies if they are made with forced labour



Only using renewable technologies that are made domestically

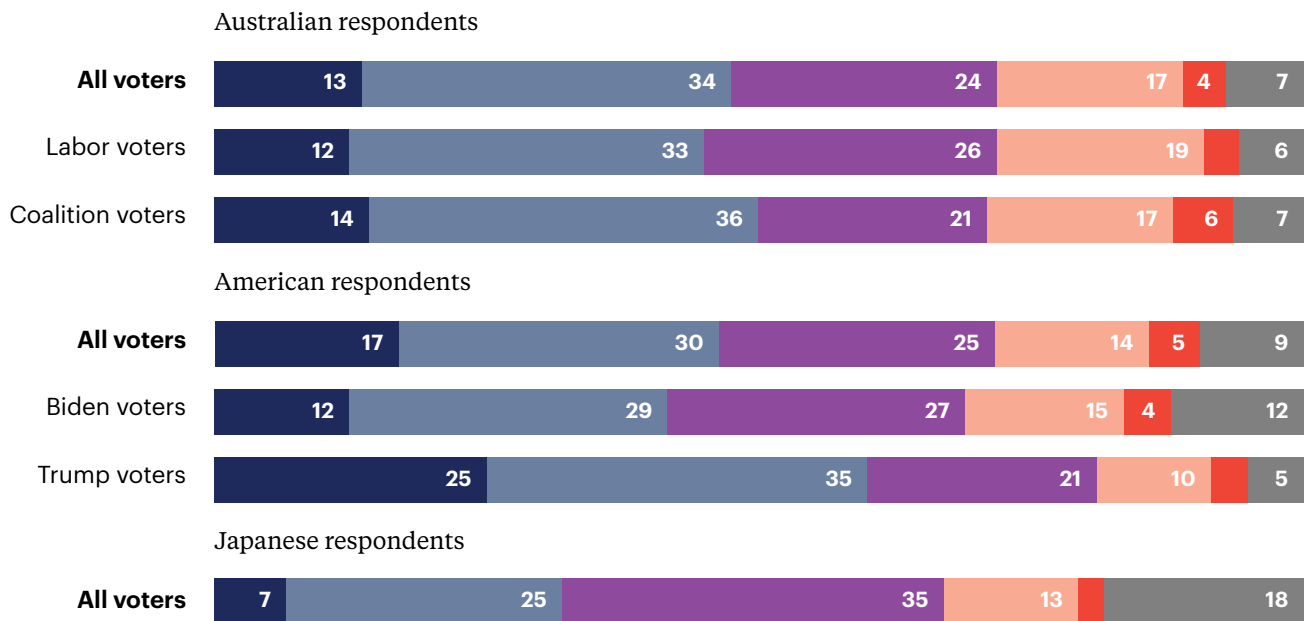


Figure 20. Most Australians and Americans want to prioritise AI regulation over innovation, while Japanese respondents are divided

Thinking of artificial intelligence, should each country:

- Prioritise regulation, even if it means slowing innovation
- Prioritise rapid innovation, even if it is less regulated
- Don't know

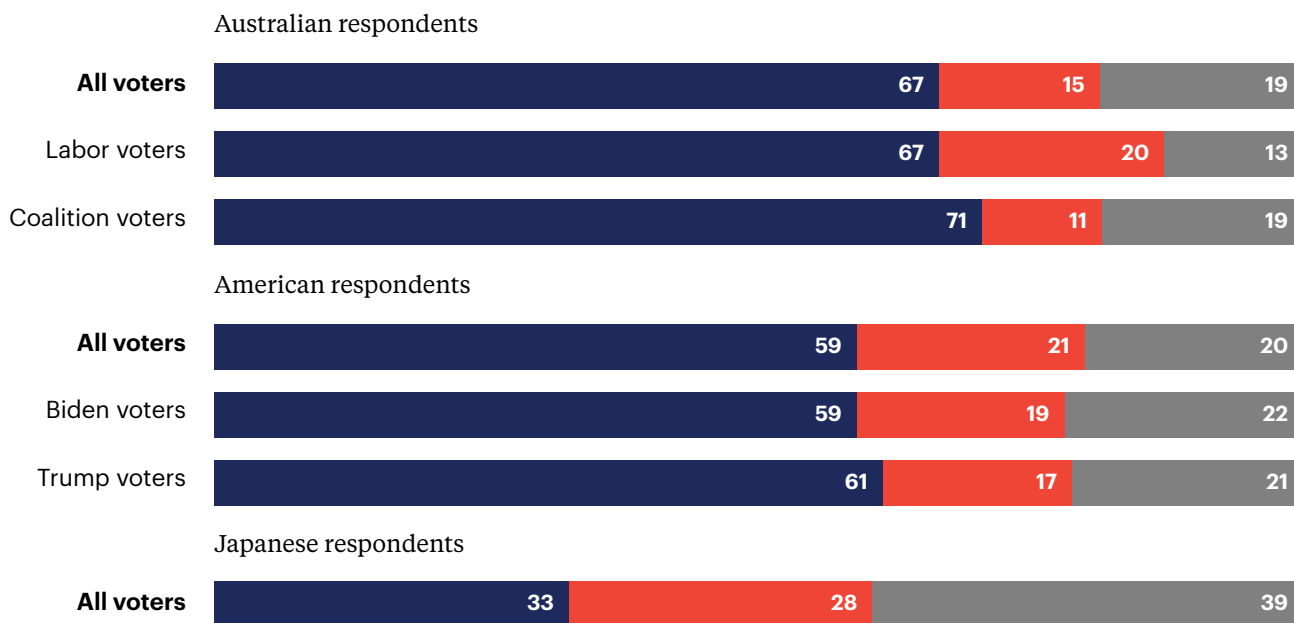
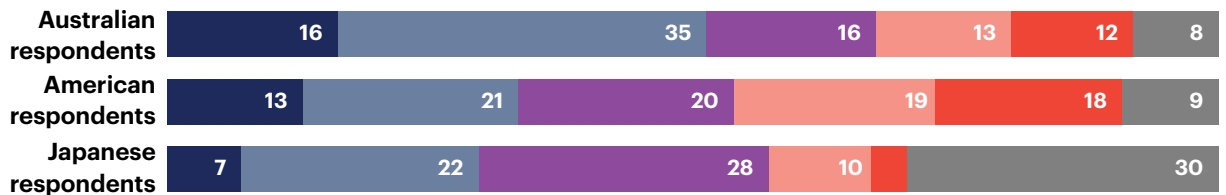


Figure 21. A majority of Australians want to outlaw disinformation even if it impacts freedom of speech — compared to a third of American and Japanese respondents

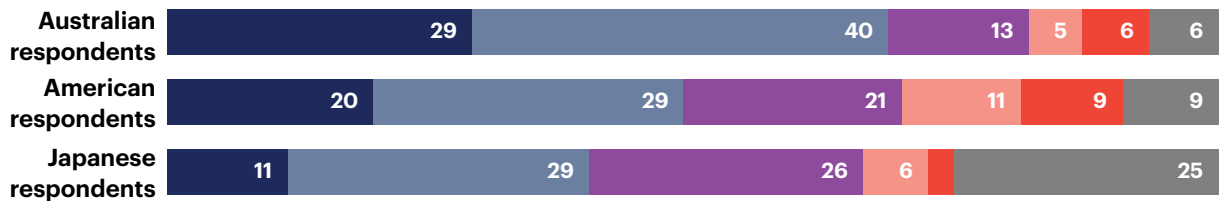
How much do you agree or disagree with Australia doing the following to counter disinformation online?

■ Strongly agree
 ■ Agree
 ■ Neither agree nor disagree
■ Disagree
 ■ Strongly disagree
 ■ Don't know

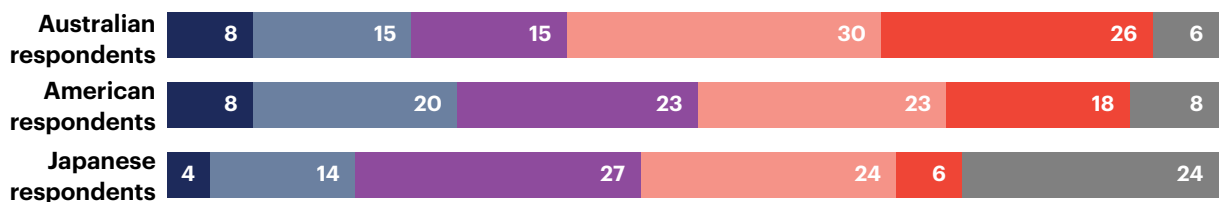
Introducing laws to outlaw disinformation, even if it impacts freedom of speech



Punishing social media and technology companies that don't do enough to stop the spread of disinformation



Leaving it up to social media and technology companies to manage the problem themselves



Key finding 6

All three publics view democracy as important at home and abroad, though Americans — and to a lesser extent, their allies — are concerned about the state of US democracy

Australian, American and Japanese respondents share an overwhelmingly positive view of the merits of democracy. Between 80% and 90% of respondents in all three countries believe that having a democratic political system is a good thing. Only a minority in each country disagrees (10% of Australians, 16% of Americans and 20% of Japanese respondents).

Similarly, the publics in all three countries remain remarkably aligned on the question of supporting democratic governance across the Indo-Pacific. Large majorities in each country agree with helping developing countries in Asia to hold democratic elections and promoting democracy as the best form of governance in Asia, with Australians demonstrating the most support (73% and 72%, respectively), followed by Americans (64%, 61%) and Japanese respondents (61%, 59%). However, respondents are split almost evenly between agreeing and disagreeing when it comes to whether their country should provide financial support to democracy activists in authoritarian countries.

While all three publics value democracy, Australians and Americans demonstrate more trust in their federal governments than their Japanese counterparts. One-third (32%) of Japanese respondents say they never trust the government to do the right thing, compared to only 18% of Australians and 24% of Americans who say the same of their respective federal governments. Just 8% of Japanese respondents say they can trust their government

to do what's right always or most of the time, compared to 25% of Australians and 17% of Americans.

A striking 69% of Australians support holding China to account on human rights even if it hurts Australian businesses, followed by 61% of Americans and 56% of Japanese respondents. Yet, while support is high, the polling also suggests that all three publics are less likely to want to stand up for human rights if they believe there will be costs to domestic businesses. Last year, an overwhelming 84% of Australians, 75% of Americans and 63% of Japanese respondents agreed with holding China to account on human rights, when there was no mention of business ramifications. This represents a respective decline of 15, 14 and seven percentage points when impacts for Australian businesses are introduced into the question.

Americans and, to a lesser extent, their allies, remain deeply concerned about the state of US politics — though have remained largely unchanged in their views since 2023. Around three-quarters of respondents in Australia and the United States continue to express concern over the way US democracy is working, Congress' ability to do its job, the president's ability to do their job, potential political violence, and a lack of compromise between Democrats and Republicans. Japanese respondents demonstrate far less concern about these US domestic challenges, with just 11–19% saying they are 'very concerned' about these issues.

Australian, American and Japanese respondents share an overwhelmingly positive view of the merits of democracy. Between 80% and 90% of respondents in all three countries believe that having a democratic political system is a good thing.

Figure 22. All three publics share an overwhelmingly positive view of the merits of democracy

What do you think about having a democratic political system as a way of governing your country?

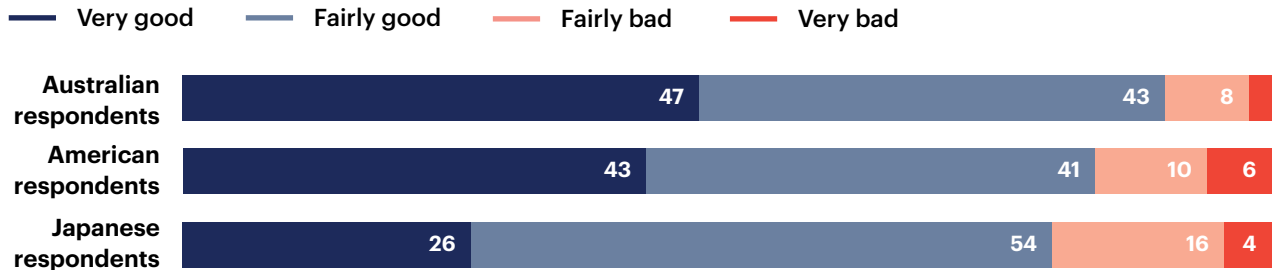


Figure 23. Large majorities in each country agree with helping developing countries in Asia to hold democratic elections and promoting democracy as the best form of governance in Asia

Thinking of democracy in Asia, how much do you agree or disagree with your country doing the following?

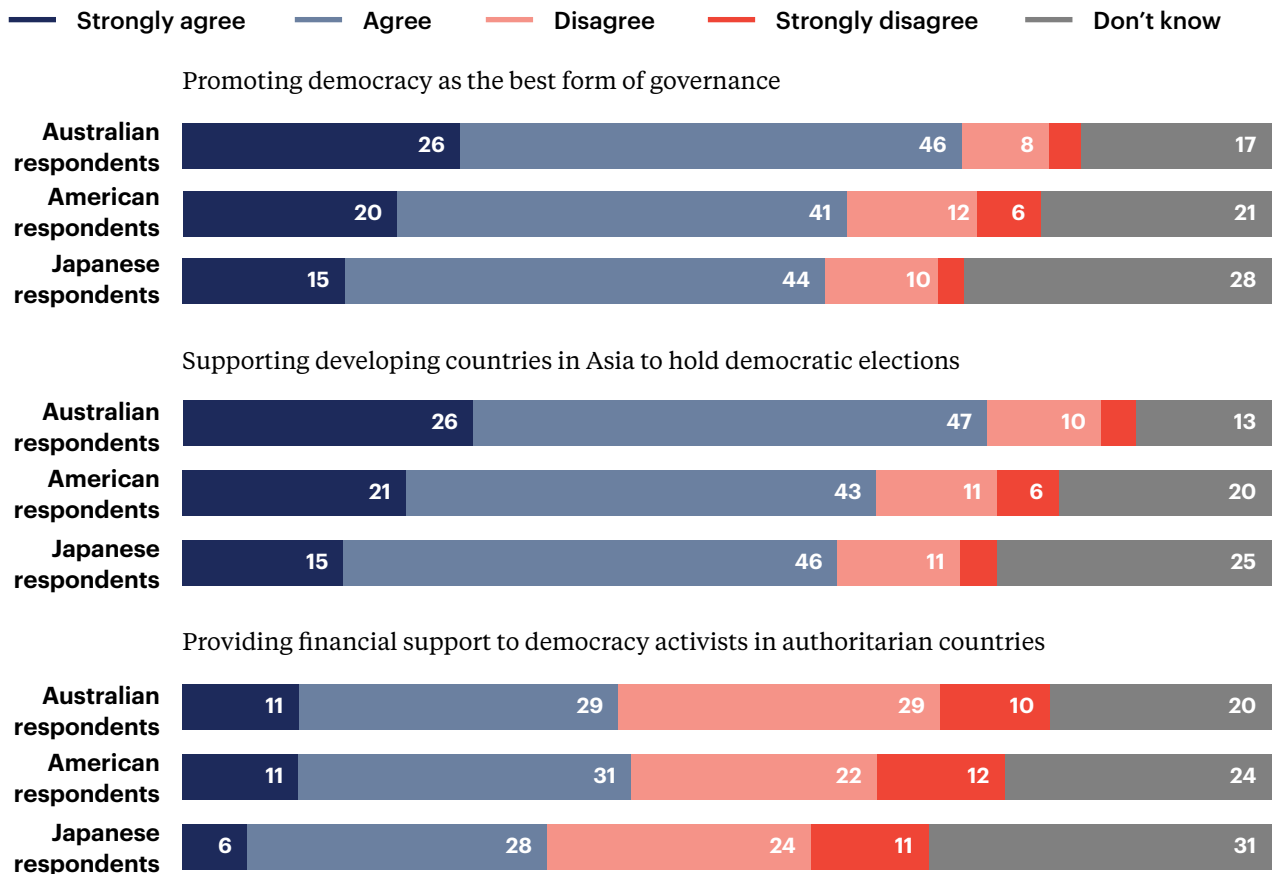


Figure 24. Australians and Americans demonstrate more trust in their federal governments than their Japanese counterparts

How often can you trust the federal government in your country to do what is right?

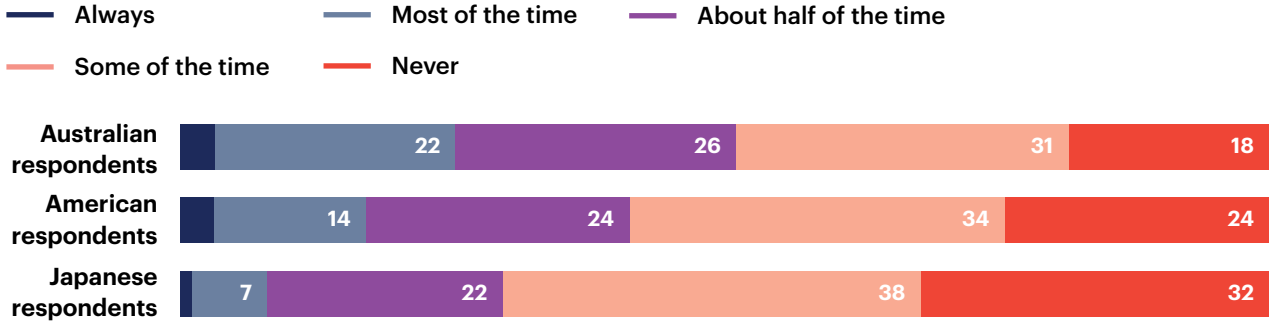


Figure 25. All three publics want to hold China to account on human rights abuses, even if it hurts domestic businesses

How much do you agree or disagree with your country working with the United States on doing the following?

Strongly agree Agree Disagree Strongly disagree Don't know

Holding China to account on human rights even if China retaliates in a way that hurts your country's businesses

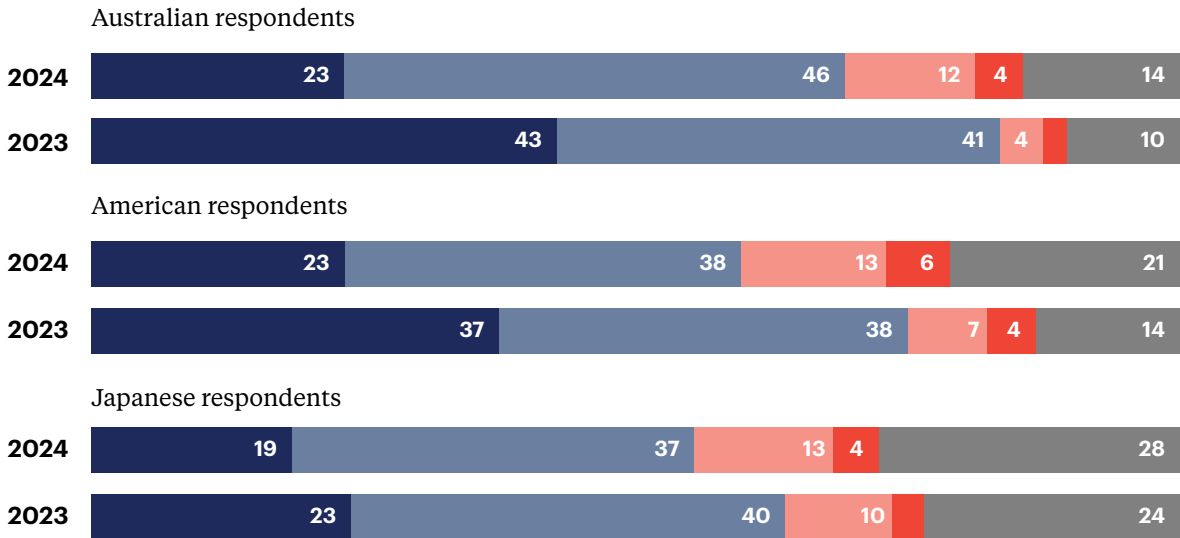
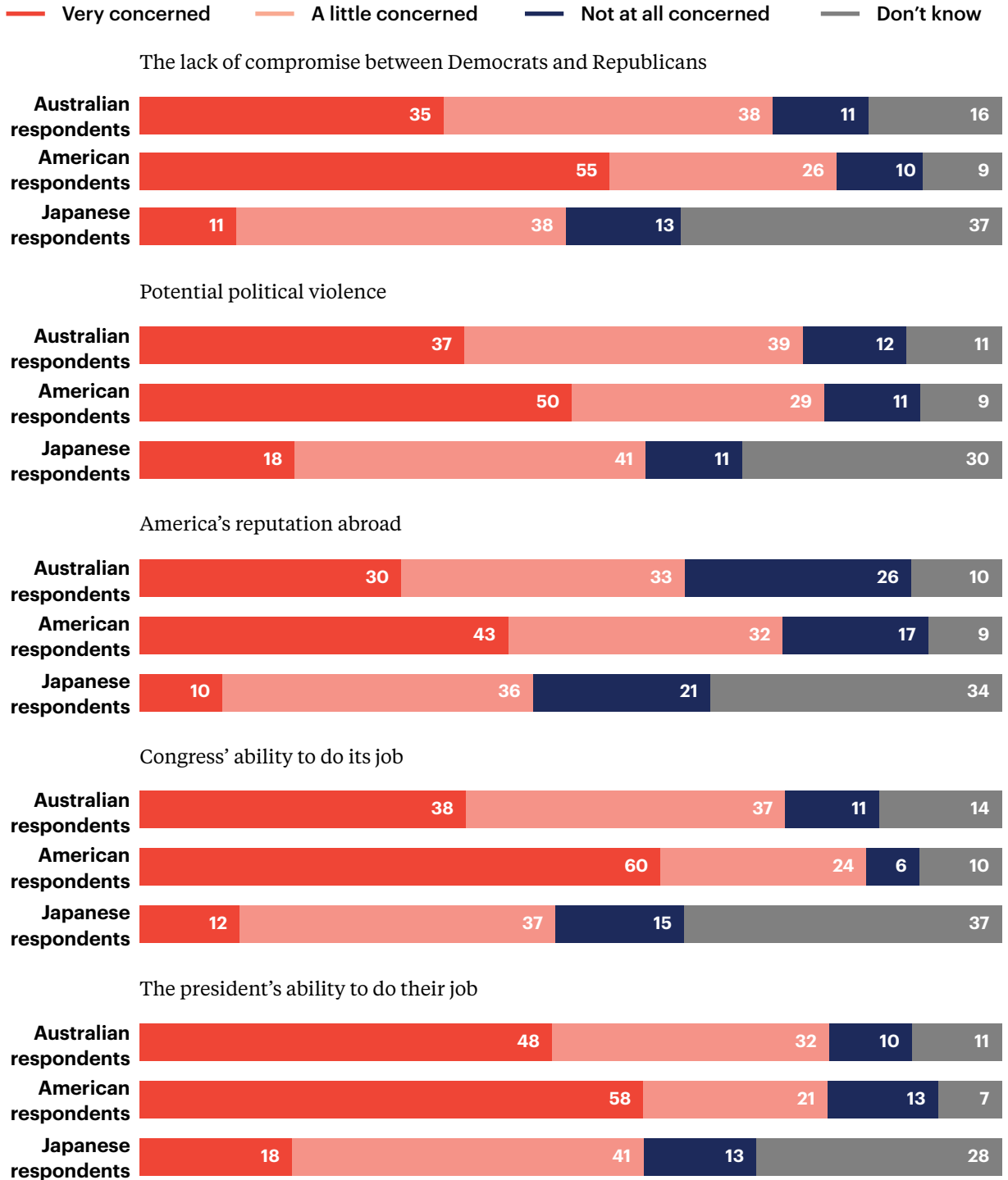
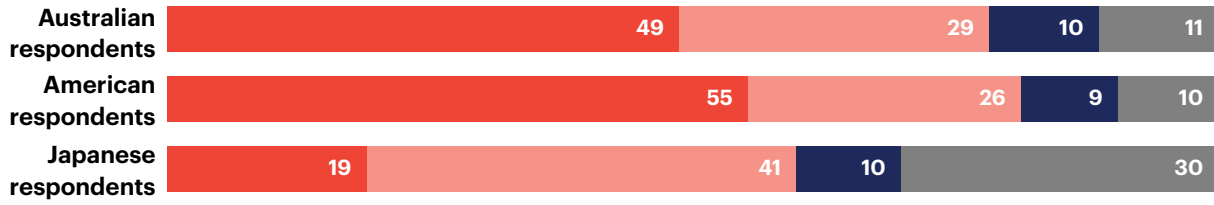


Figure 26. Americans and, to a lesser extent, their allies, remain deeply concerned about the state of US politics

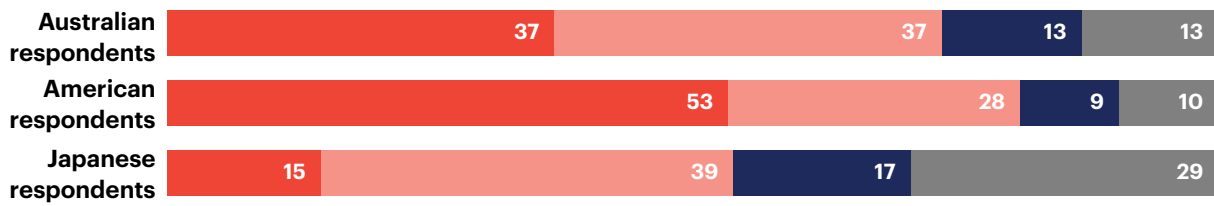
How concerned are you about the following in the United States?



Misinformation



The way democracy is working



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Jared Mondschein is the Director of Research at the United States Studies Centre. Jared's analysis has appeared in outlets including ABC, BBC, CNN, Foreign Policy, MSNBC, and Sky News as well as across major Australian mastheads. Previously, Jared was a Research Analyst at Bloomberg BNA in Washington, DC, where he focused on cross-border tax issues. Prior to joining Bloomberg BNA, Jared was a Research Associate in the Asia Studies program of the Council on Foreign Relations, an editorial assistant at Foreign Policy magazine, and an assistant editor at a policy journal in Beijing. He holds a Bachelor of Arts in government and international affairs from Skidmore College in New York and a Master of Arts degree in international relations from King's College London.



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