

A Survey of Australians' Attitudes to Trade with the European Union

Benchmark April 2024



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TRANSFORMING INSIGHTS INTO
ACTIONABLE STRATEGIES

Introduction

This new survey of Australians' attitudes shows a strong level of support for the European Union (EU) and in particular for a free trade agreement with the EU, with over 82% either strongly or somewhat supporting the deal, and less than 2% against.

The Institute of International Trade (IIT) commissioned the survey of over 1700 Australians across Australia in April 2024, and the survey was conducted by Insightfully, a respected market and social research firm.

While some media commentary paints the European Union as unpopular, aloof or anti-business, Australians see the EU positively, and are very positive towards a trade agreement. The results were even more positive when Australians' attitudes towards the European Union were compared with attitudes towards two of our other main trading partners, the United States and China. The European Union was also seen as a more reliable trading partner and as closer to Australian values, than the US.

Australians were asked to rank the benefits of an FTA in level of importance. They were clearly more focussed on wider benefits, such as it being good for the economy, for jobs, for Australian manufacturers and exporters, rather than for personal benefits such as cheaper cars, technology, food

or wine. We also asked about Geographical Indicators (GI) as much of the media commentary has focused on this issue. We found that 30% were definitely aware of the issue, while 26% were probably aware of the issue, and, surprisingly there was a lower awareness in regional areas.

Respondents were also asked to identify their voting preferences, and these were tallied with their responses across a range of metrics. Key findings include that the Coalition are seen as better economic managers than federal Labor, but nearly half of respondents indicated that their opinion of the Labor government would improve if it successfully signs an FTA with the EU.

The survey document contains two parts. The main findings are presented first, and grainier "deep dives", second. The report is packed with interesting insights, overall revealing robust support for improved trade relations with the EU in a context of strong values-alignment.

This survey was funded under Foreign Policy Instrument: Multiple Framework Contract FWC PSF 2019 Lot 3 "Trade and Market Access" – "Business Outreach and Promotion of the EU-Australia FTA"

Objective & Summary Methodology.

Background & Objective

- This research has been commissioned to provide insights into Australian voters' attitudes towards Australia's trading partners and the proposed FTA with the European Union.
- The objective is to obtain accurate views of Australian voters on sentiment and attitude towards the EU, reasons for those views, and comparisons with some other relevant nations.

Methodology

- 10-minute online survey n=1700 registered Australian voters, fielded March 27 – April 5, 2024, including sub-sample boosts in the smaller states (full breakdown overleaf).
- Margin of error on the total sample is +/-2.4% (at the 95% confidence interval); smaller sub-samples may have varying margins of error.
- Data weighted to be representative of the Australian voting population by age, gender and location based on the AEC and ABS statistics.

Sample Profile.

Sample Profile		%	n	MOE*
Gender	Male	49%	803	+/-3.5%
	Female	51%	894	+/-3.3%
Age	18-34	26%	553	+/-4.2%
	35-54	34%	551	+/-4.2%
	55+	40%	596	+/-4.0%
State	NSW/ACT	33%	326	+/-5.4%
	Vic	25%	320	+/-5.5%
	Qld	21%	319	+/-5.5%
	WA	10%	297	+/-5.7%
	SA	7%	313	+/-5.5%
	Tas/NT	3%	125	+/-8.8%
Purchase EU Product in Last 3 months	Purchased EU product	36%	676	+/-3.8%
	Not purchased EU product	29%	470	+/-4.5%
	Unsure purchased EU product	34%	554	+/-4.2%
European Background	No Euro background	77%	1290	+/-2.7%
	1st Gen European	8%	130	+/-8.6%
	2nd Gen European	16%	280	+/-5.9%
Employment	Employed FT (>35 hrs per wk)	41%	827	+/-3.4%
	Employed PT (<35 hrs per wk)	15%	244	+/-6.3%
	Business owner / Self-employed	8%	144	+/-8.2%
	Retired / Pensioner	25%	324	+/-5.4%
	Unemployed	3%	41	+/-15.3%
	Home duties	5%	74	+/-11.4%
	Student	3%	40	+/-15.5%
Education	School	39%	321	+/-5.5%
	Certificate 3 or 4, Diploma	29%	505	+/-4.4%
	University degree	30%	847	+/-3.4%
	Other / Prefer not to say	2%	27	+/-18.9%
TOTAL		100%	1700	+/-2.4%



*Margin of error at the 95% confidence interval

Key Insights



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Key Insights.

1.

A majority of Australians (57%) are favourable towards the European Union; only 8% are unfavourable

This compares with a strong total favourability for the US at 55%, still favourable but not as positive as the EU, and 22% unfavourable towards the US. In contrast, more than half of Australian voters (58%) are unfavourable towards China.

2.

Australians support an FTA with the EU with 82% supporting and less than 2% opposing.

38% strongly support and 44% somewhat support.

3.

The top reasons for Australians supporting the EU FTA were:

- a. Opens up a market of 450 million people for Aust. exports
- b. Is good for the Aust. economy
- c. Create jobs in Australia
- d. Diversifies the list of destinations for Aust. exports
- e. Lowers costs for Aust. manufacturing through access to cheaper European equipment

Key Insights.

4.

The EU is seen as a more reliable trading partner, more business friendly and as closer to Australia in values as compared to the United States and China.

5.

The EU's image as a trading partner is very positive. Aust'ns view the EU 25pts or more positively than the US & China across a range of indicators:

- a. Following international rules
- b. Respectful of human rights
- c. Socially progressive
- d. Responsive to climate change
- e. Environmentally friendly
- f. Politically stable and
- g. Transparent

For each indicator, Aust'ns saw EU as most similar to how they saw themselves.

6.

When Australians learn more about the FTA, they support it even more.

Support rose from 82% to 87%, with "strongly support" rising from 38% to 53% after hearing potential benefits. The group who experiences the largest increase in support is "undecided voters", whose net support rises 14pts

Key Insights.

7.

The federal Coalition are seen as better economic managers than federal Labor (41% to 31%).

8.

However, 49% of voters say they will have a better opinion of the Labor Government if it successfully signs an FTA with the EU.

29% say it would make no change, and 22% were unsure. Soft voters and those in marginal seats are more likely than average to hold a better opinion of Labor if an FTA was successfully signed.

Support for EU Trade Agreement

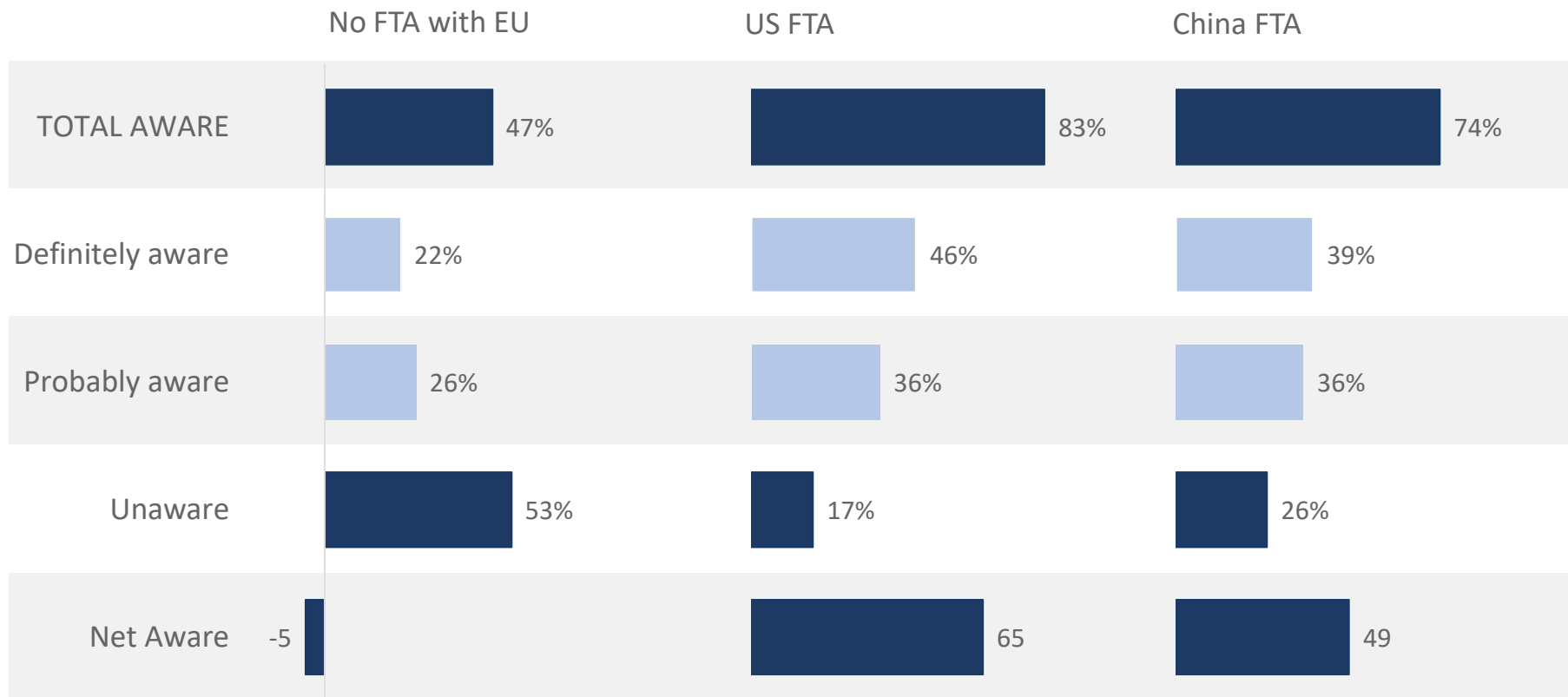


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A majority of Australians are not aware there is no free trade agreement with EU.

Free Trade Agreement Awareness



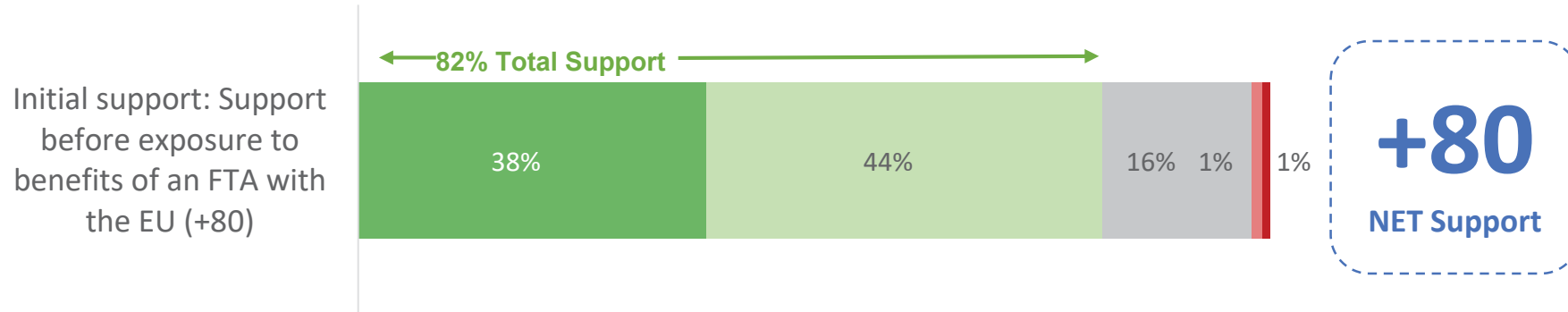
Net Aware: % Total Aware (Definitely aware + Probably aware) - % Unaware

Q15. The United States is the fourth largest trading partner. Before today, were you aware that Australia has a Free Trade Agreement with the United States? / Q16. China is Australia's largest trading partner. Before today, were you aware that Australia has a Free Trade Agreement with China? / Q17. The EU is Australia's third-largest trading partner, but is the only main trading partner with which Australia does not have a Free Trade Agreement. Before today, were you aware that Australia does not have a Free Trade Agreement with the European Union?

- Only one in five Australians are 'definitely aware' Australia does not have a Free Trade Agreement with the EU
- For those who purchased a EU product in the past 3 months, 30% are 'definitely aware' there is no FTA
- Fewer Australians are aware we have an FTA with the China (39%) than those who know we have an Agreement

Eight out of 10 Australians support a Free Trade Agreement with the EU.

Initial v Considered Support for Trade Agreement with EU



■ Strongly support ■ Somewhat support ■ Neither support nor oppose ■ Somewhat oppose ■ Strongly oppose

Net Support (in brackets): % Total Support - % Total Oppose

Q18. Australia and the European Union are currently negotiating a Free Trade Agreement, intended to benefit both sides. Overall, even if it's a slight leaning or guess, do you support or oppose Australia making a Free Trade Agreement with the European Union?

Q20. Having heard some of the potential outcomes of a Free Trade Agreement with Europe, now do you support or oppose Australia making a Free Trade Agreement with the European Union? *N.B. For clarity labels <2% removed*

- There is almost no opposition to an FTA with the EU

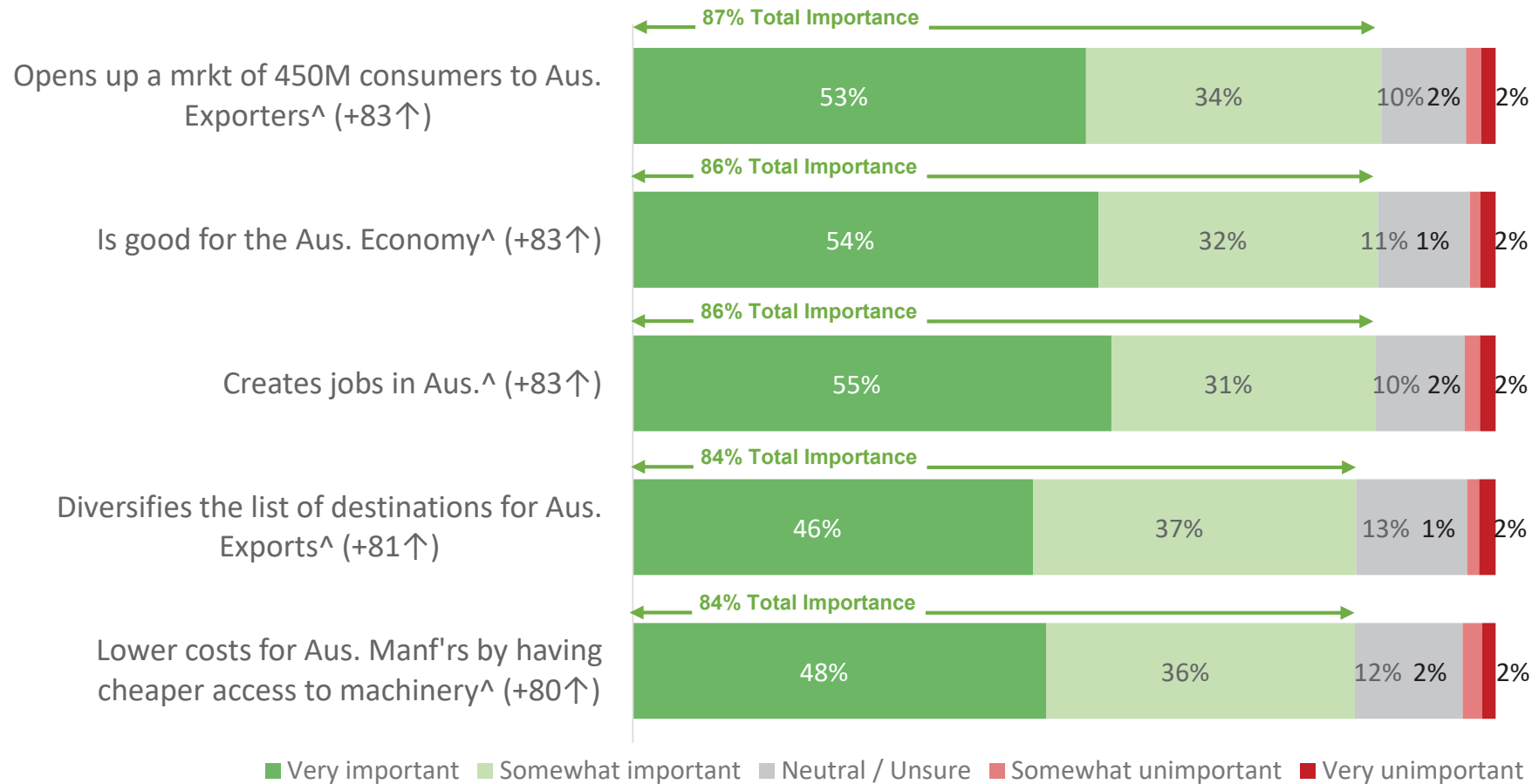
Reasons to Support EU Trade Agreement.

Full Wording	Abbreviated Wording
Is good for the Australian economy overall	Increases opportunities for Australians to work and study in Europe
Opens up a market of more than 450 million consumers to Australian exporters	Diversifies the list of countries from which Australia receives foreign investment
Creates jobs in Australia	More choice of European goods for Australians
Diversifies the list of destinations for Australian exports	Cheaper European goods for Australians
Lower costs for Australian manufacturers by having cheaper access to machinery	Lowers the cost of European cars and technology
Gives European countries the same ability to trade with Australia that China and the US currently have through their Free Trade Agreements	Makes it easier for Australia to access financial investment from Europe
Less red tape for Australian business trading with Europe	Lowers the cost of European food and wine
Makes it easier for Australian businesses to benefit from the skills of European professionals	

Q19. Here are some potential outcomes from a Free Trade Agreement with the European Union.
How important to you personally are each of these potential outcomes?

The four most important benefits of an EU FTA are those derived from our exports.

Importance of Support Messages (1/3)



Sorted by Total Importance: % Very Important + % Somewhat Important

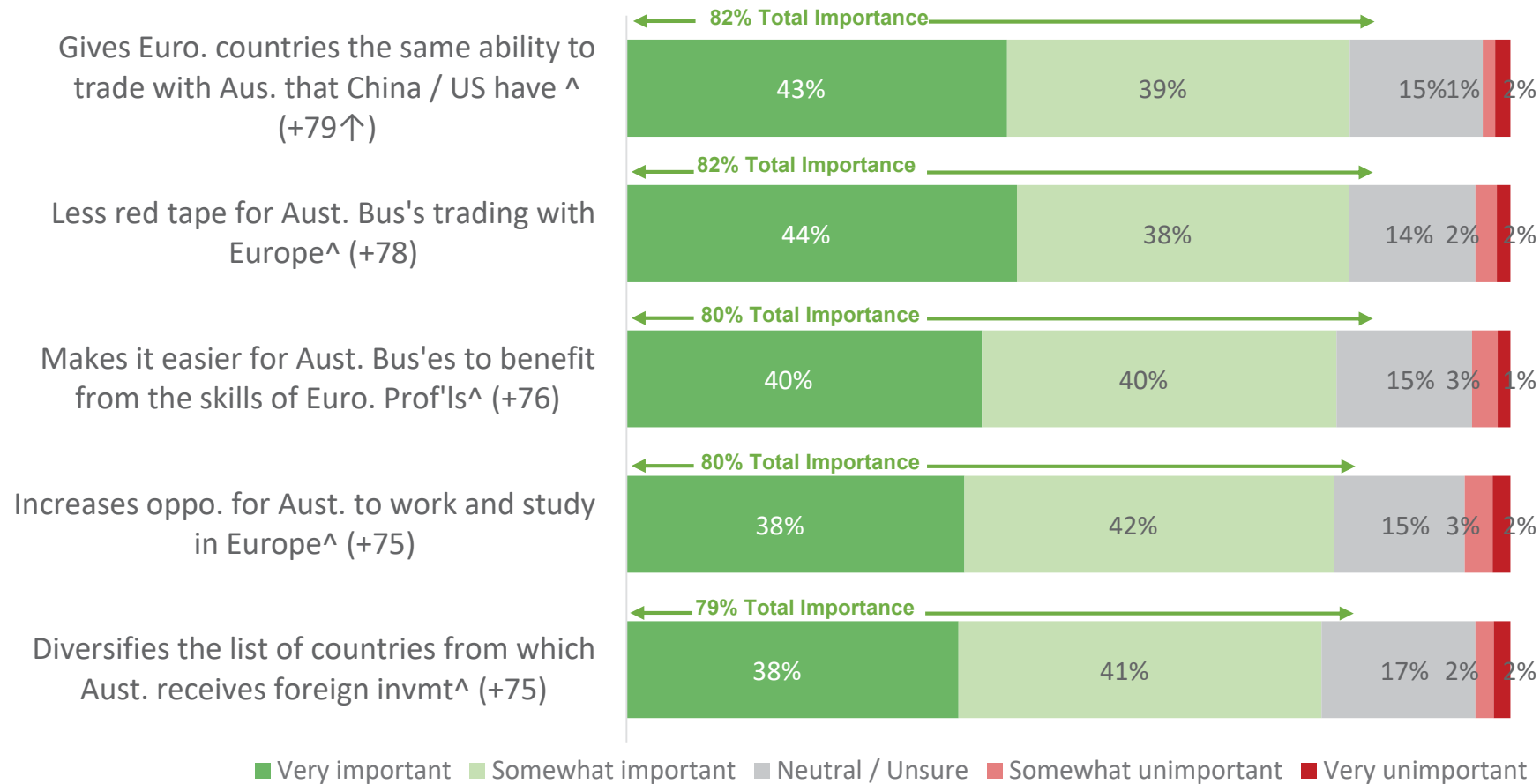
N.B. Net Importance (in brackets): % Total Important - % Total Unimportant

Q19. Here are some potential outcomes from a Free Trade Agreement with the European Union. How important to you personally are each of these potential outcomes? N.B. For clarity labels <3% removed, ^ label shortened

- The most important 'import' benefit to Australians from a Free Trade Agreement with the EU is access to cheaper machinery, timely given the Labor government's announcement of a local manufacturing program

Over 80% of voters support equal trading conditions for the EU, China and US.

Importance of Support Messages (2/3)



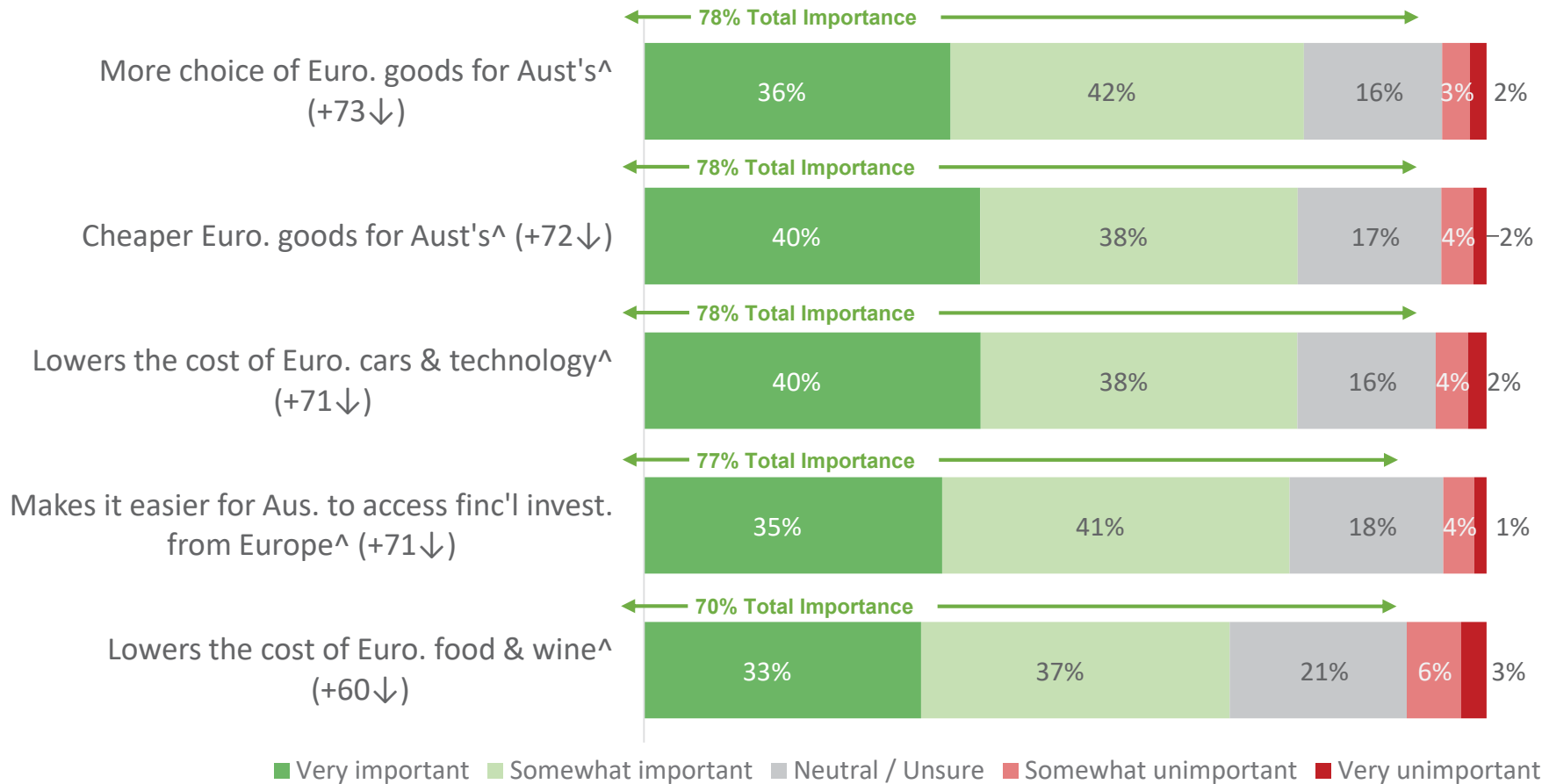
Sorted by Total Importance: % Very Important + % Somewhat Important

N.B. Net Importance (in brackets): % Total Important - % Total Unimportant

Q19. Here are some potential outcomes from a Free Trade Agreement with the European Union. How important to you personally are each of these potential outcomes? N.B. For clarity labels <3% removed, ^ label shortened

Australians seem more focused on economic benefits than personal benefits.

Importance of Support Messages (3/3)



Sorted by Total Importance: % Very Important + % Somewhat Important

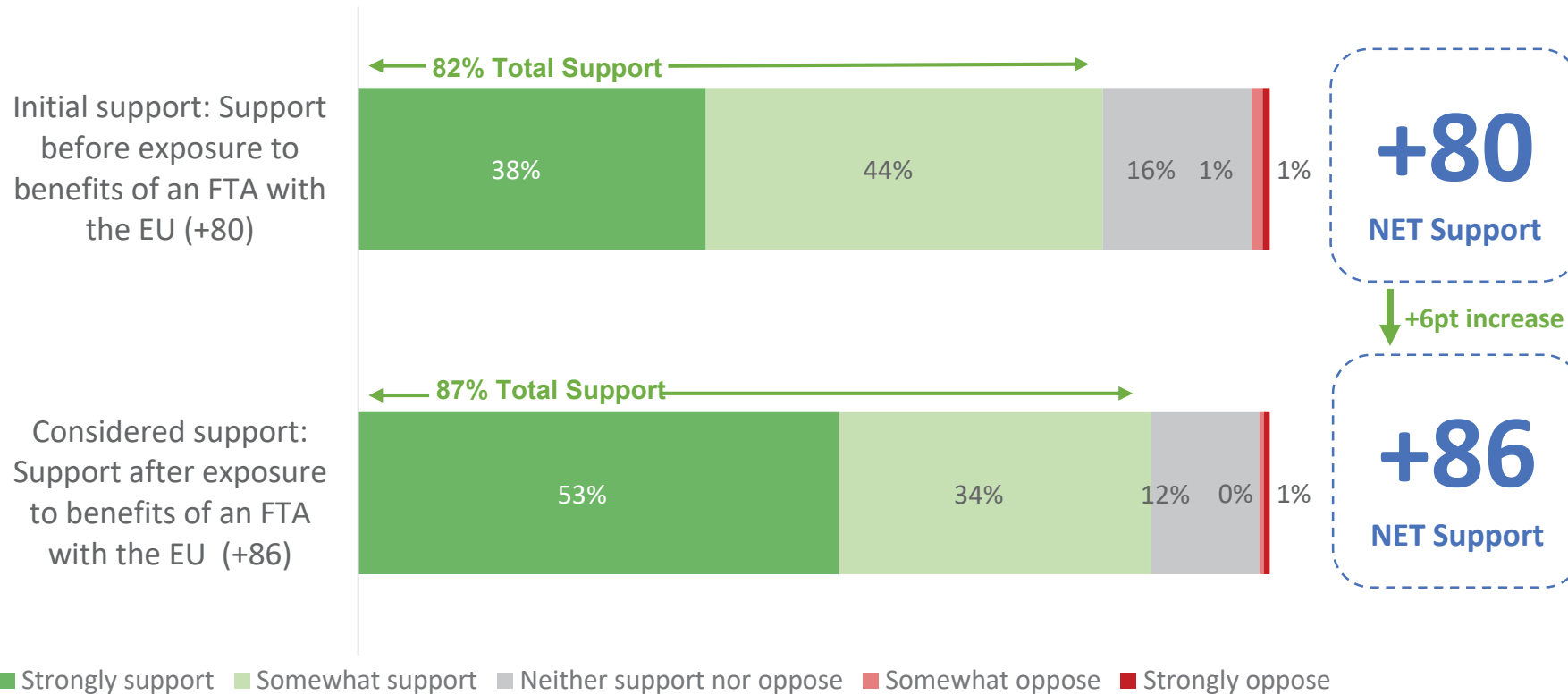
N.B. Net Importance (in brackets): % Total Important - % Total Unimportant

Q19. Here are some potential outcomes from a Free Trade Agreement with the European Union. How important to you personally are each of these potential outcomes? N.B. For clarity labels <3% removed, ^ label shortened

- The least important outcome from an EU Free Trade Agreement is cheaper European food and wine, however 70% still see it as important

Support for an Agreement increases after exposure to benefits of an FTA.

Initial v Considered Support for Trade Agreement with EU



Net Support (in brackets): % Total Support - % Total Oppose

Q18. Australia and the European Union are currently negotiating a Free Trade Agreement, intended to benefit both sides. Overall, even if it's a slight leaning or guess, do you support or oppose Australia making a Free Trade Agreement with the European Union?

Q20. Having heard some of the potential outcomes of a Free Trade Agreement with Europe, now do you support or oppose Australia making a Free Trade Agreement with the European Union? *N.B. For clarity labels <2% removed*

- Once voters are shown a number of reasons to support the EU FTA, support goes up marginally to 87%
- Importantly, though, **strong support for a Free Trade Agreement with the EU increases 15% after exposure to its benefits**

Political Context

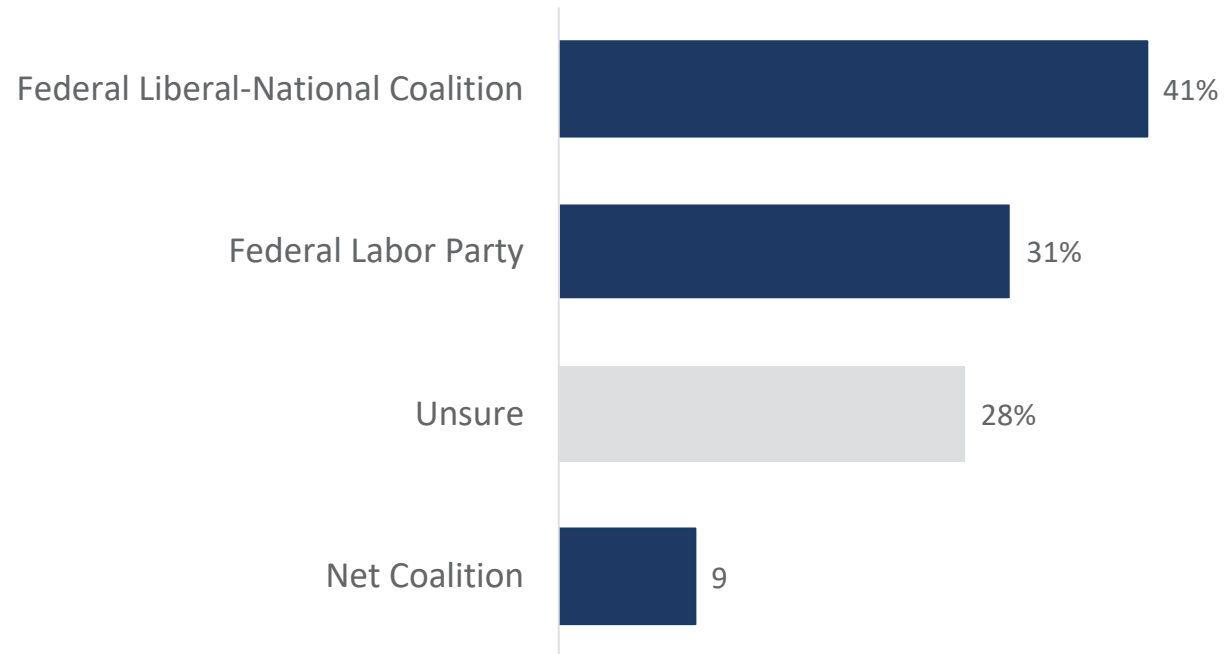


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Voters say the Coalition are better economic managers than Labor.

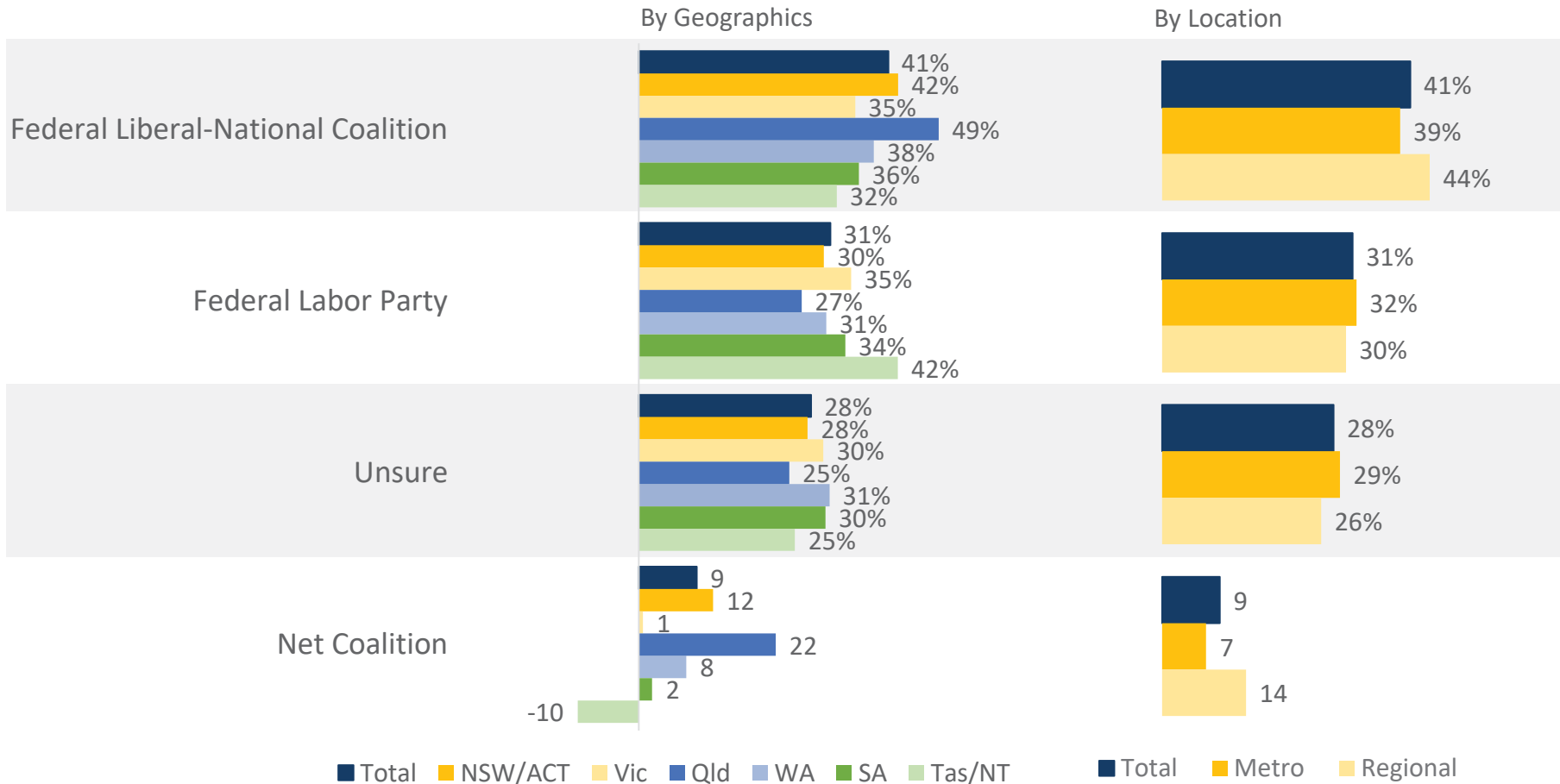
Political Party Best at Economic Management



Net Coalition: % Federal Liberal-National Coalition - % Federal Labor Party
Q11a. Who do you think are better economic managers?

The Coalition are seen as better economic managers in all states except Tas/NT.

Political Party Best at Economic Management

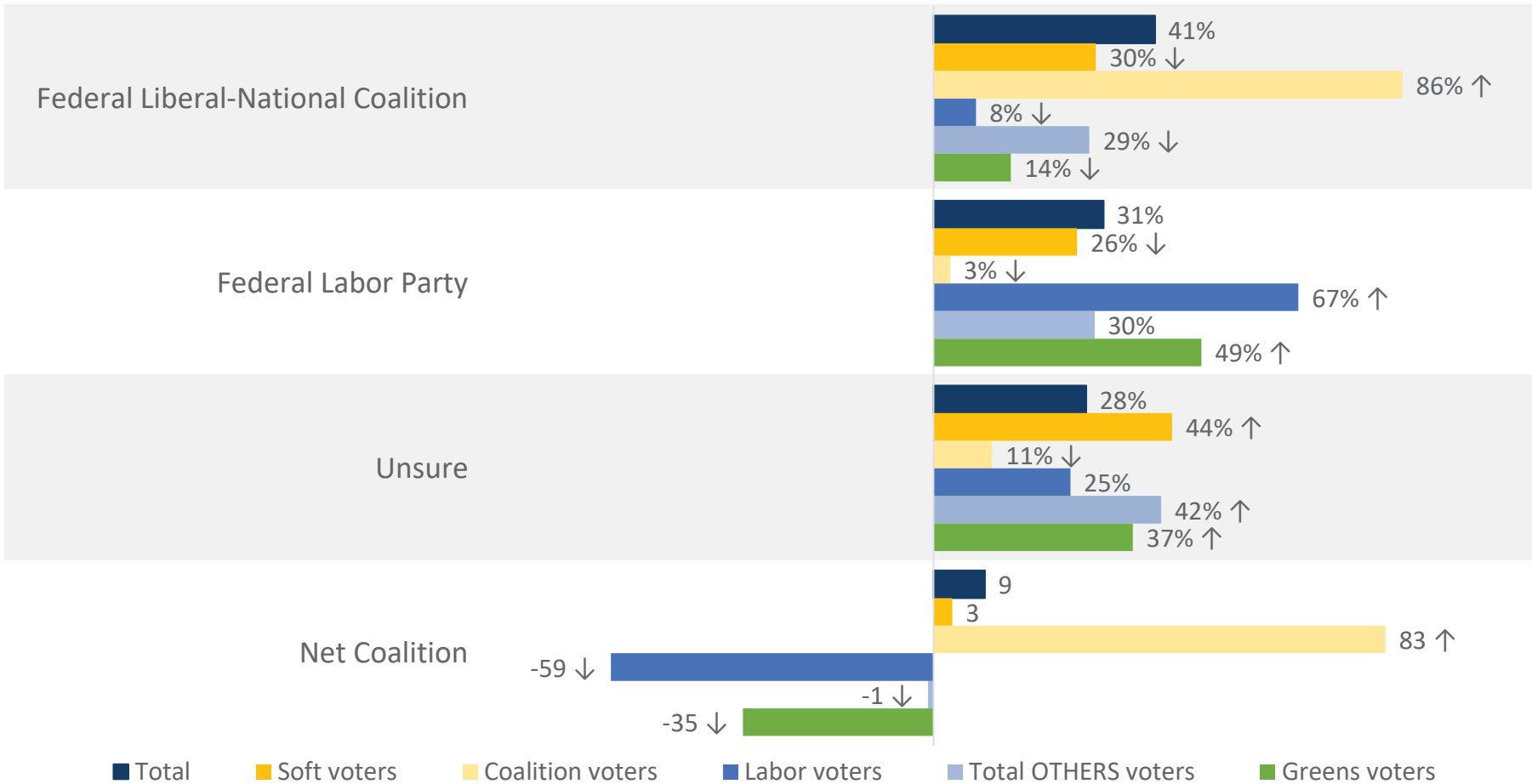


Net Coalition: % Federal Liberal-National Coalition - % Federal Labor Party

Q11a. Who do you think are better economic managers?

Nearly one in ten Labor voters say the Coalition are better economic managers.

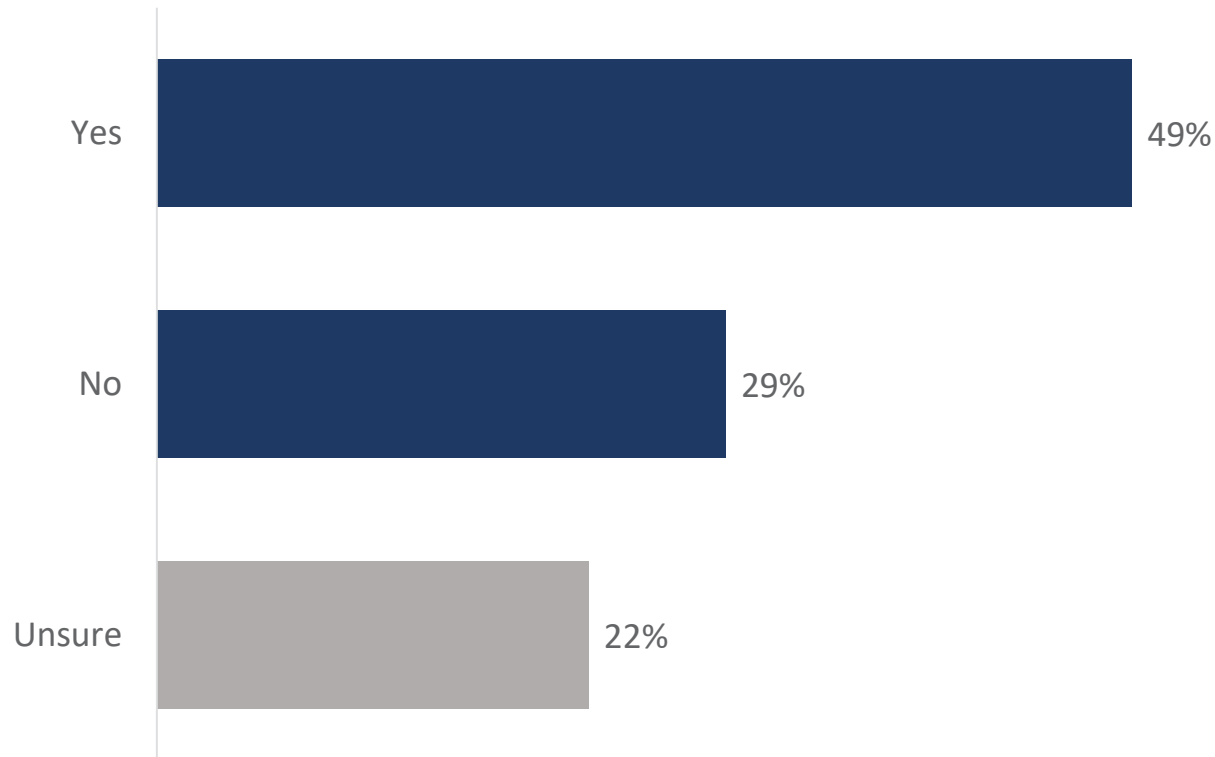
Political Party Best at Economic Management – By Voting Intention



Net Coalition: % Federal Liberal-National Coalition - % Federal Labor Party
 Q11a. Who do you think are better economic managers?

Half Australia's voters would have a better opinion of Labor if it signed an FTA w EU.

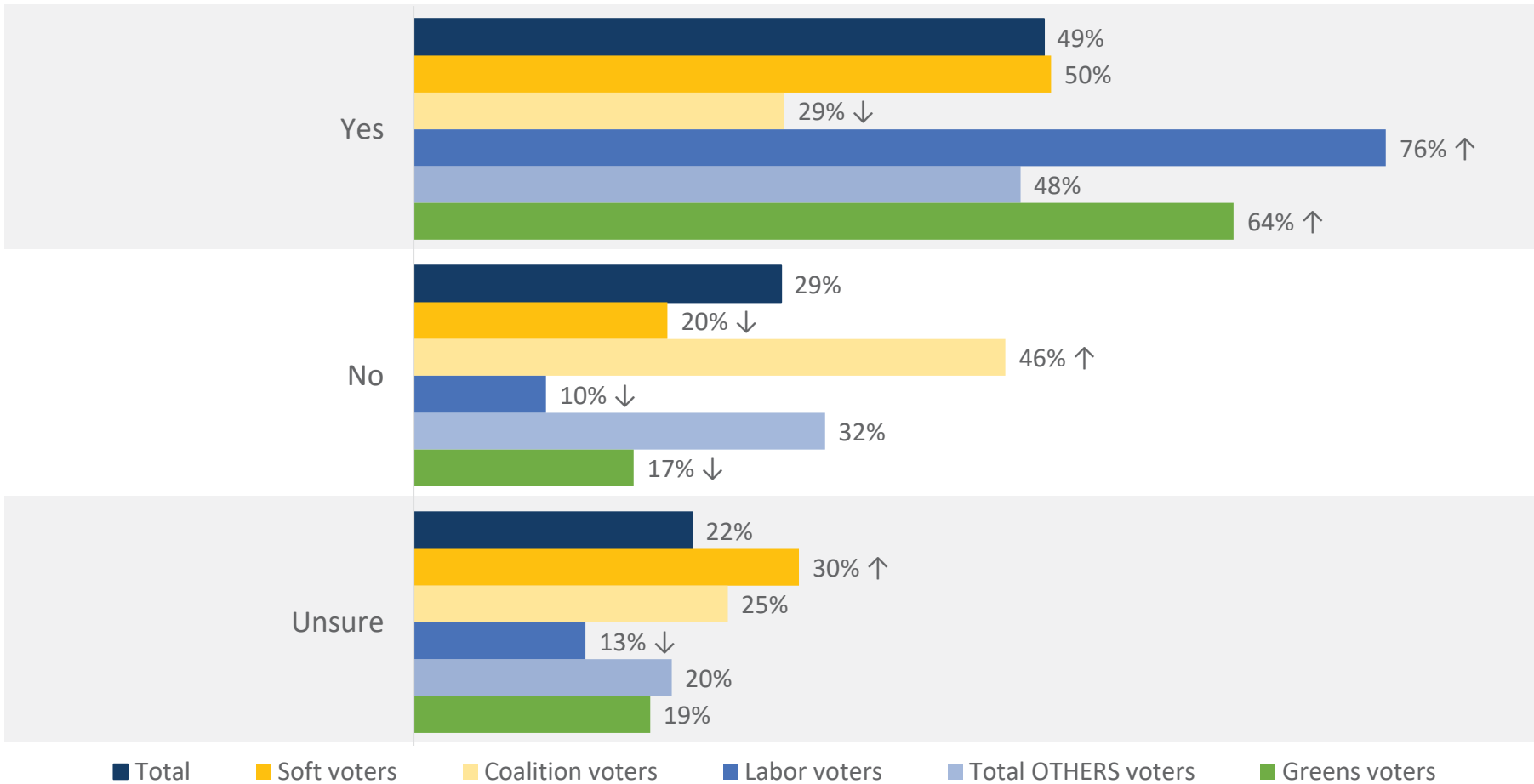
EU FTA Improve Opinion of Labor Government



Q22. If the current Federal Labor Government managed to successfully sign a Free Trade Agreement with the European Union would this improve your opinion of the Federal Labor Government?

Signing the FTA improves opinion of the Government among soft voters as well.

EU FTA Improve Opinion of Labor Government



Q22. If the current Federal Labor Government managed to successfully sign a Free Trade Agreement with the European Union would this improve your opinion of the Federal Labor Government?

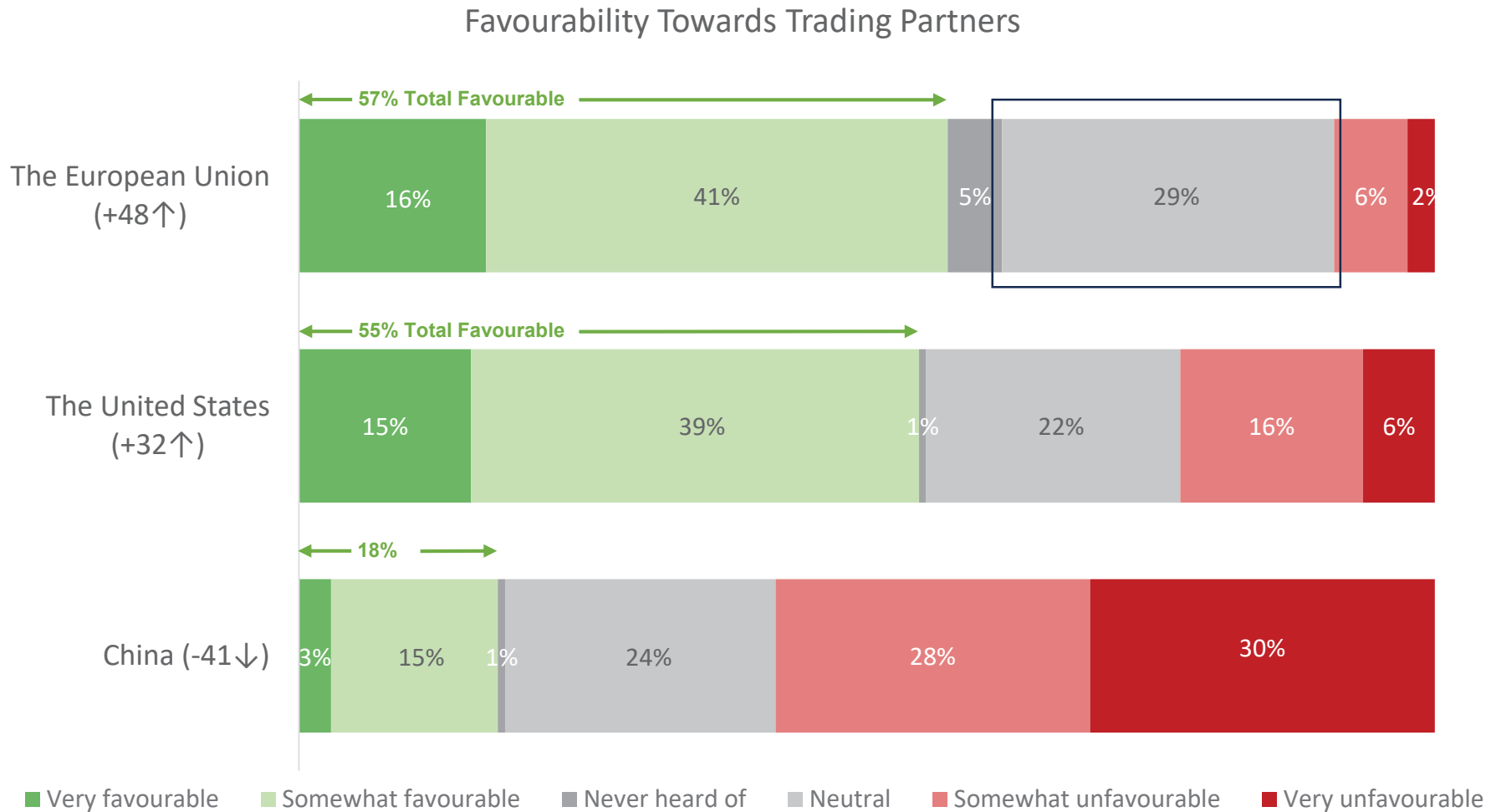
Trading Partners Awareness and Attitudes



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Australian voters are favourable towards EU and US, but negative towards China.



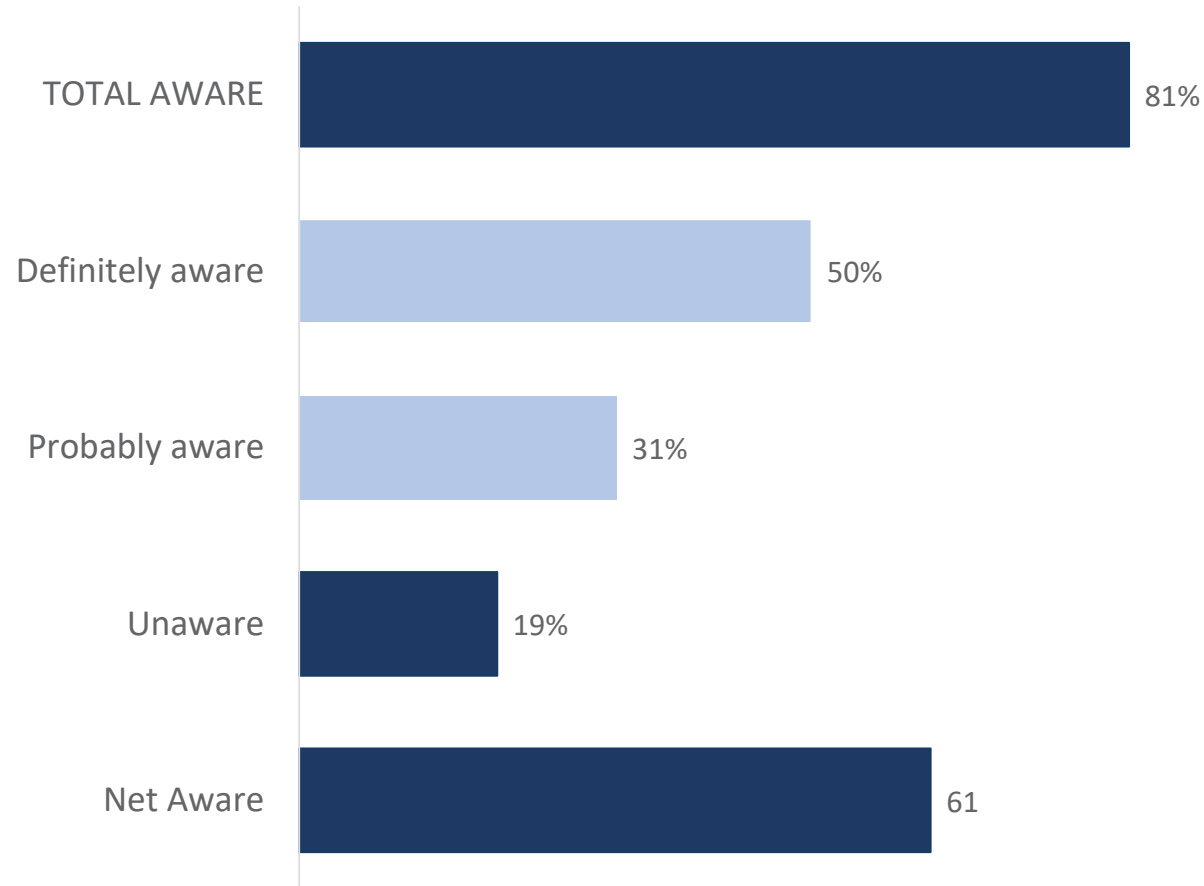
Sorted by Net Favourable (in brackets): % Total Favourable - % Total Unfavourable

Q12. And here are some of Australia's largest trading partners. For each please indicate whether you have a favourable, unfavourable or neutral view of them overall. If you have never heard of them, that's fine, just mark 'Never heard of'.

- A majority of Australians (57%) are favourable towards the European Union; only 8% are unfavourable
- This gives the EU a very strong net favourability among Australian voters of +48pts
- This compares with strong net favourability for the US of +32pts: still favourable but not as positive as the EU
- However, around a third of Australian voters are either neutral or have never heard of the European Union (compared with less than a third for the US)
- Nearly a third of Australian voters are very unfavourable towards China; their net favourability is -41pts showing a **strength and depth of negativity towards China** in the Australian community right now

Eight out of 10 Australians aware of the EU and its definition; one-fifth are unaware.

Awareness of EU's Unique 27 Country Partnership

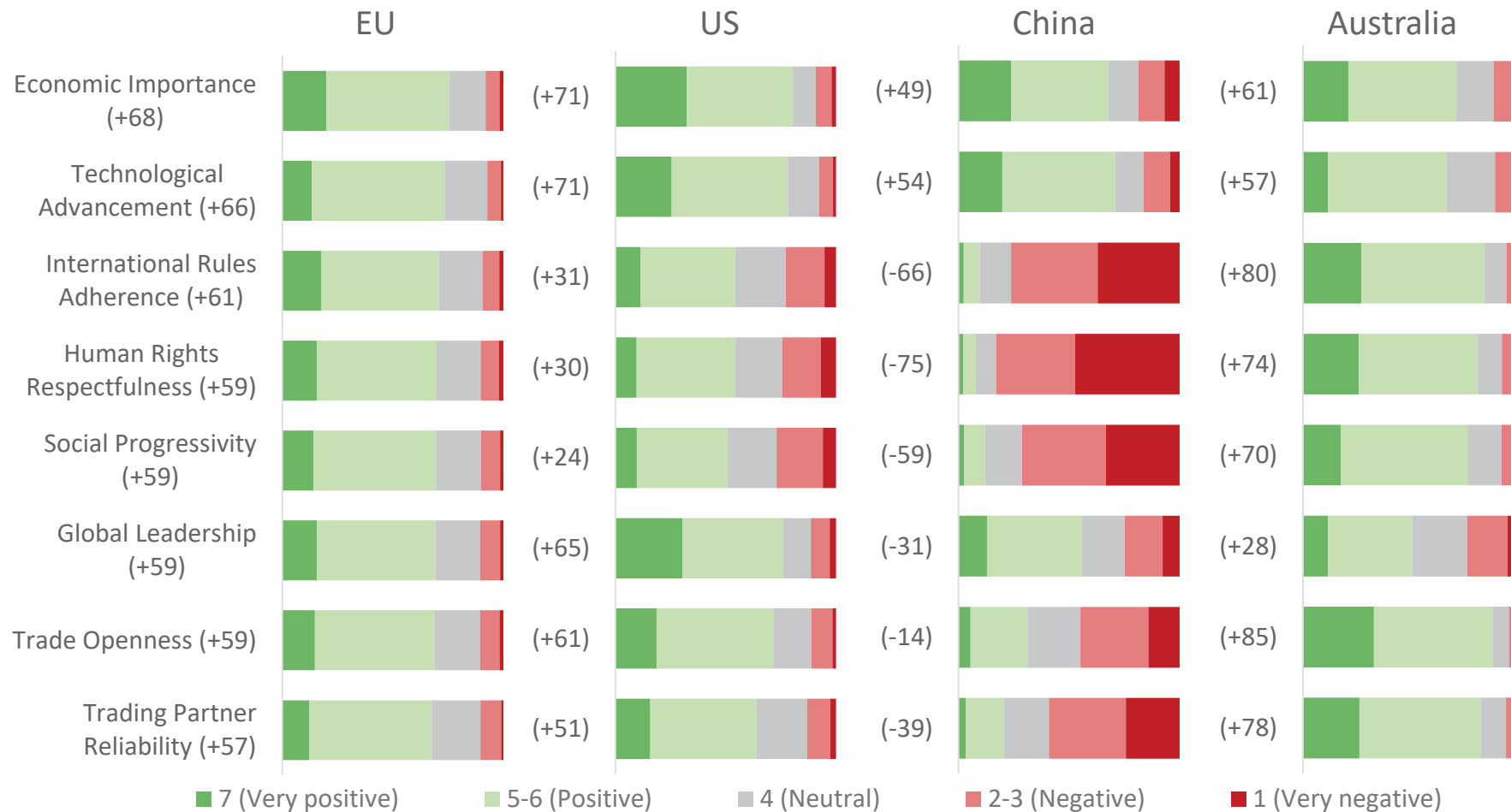


Net Aware: % Total Aware (Definitely aware + Probably aware) - % Unaware

Q13. Were you aware that the European Union is a unique partnership of 27 countries in Europe? One way they act together is through establishing a common trade approach with countries like Australia.

Voters rank EU strongest on economic importance and tech advancement.

Summary – Sentiment Towards Australia and Trading Partners (1/2)



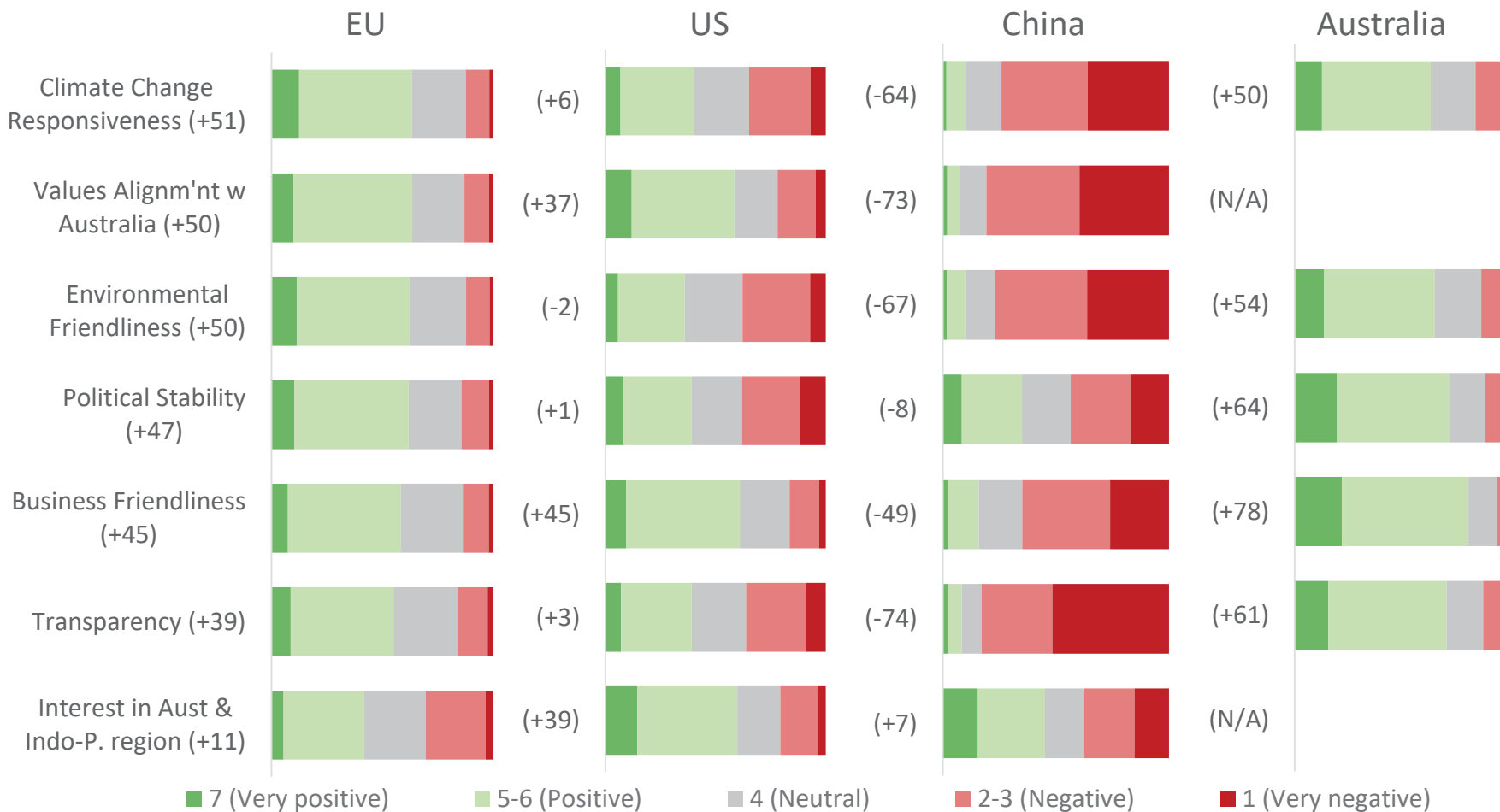
Sorted by EU Net Positive: % Positive (5+6+7) – % Negative (1+2+3). N.B All labels shortened

- A semantic differential scale is used to measure voters views of the EU, other major trading partners, and Australia itself
- Respondents rank each country from positive to negative on 15 descriptive terms
- Australian voters perceive the EU's strengths to be its economic importance (+68 net positive on a 7-point scale from 'economically important' to 'economically unimportant') and technological advancement (+66)
- However: the US performs better on both these descriptors compared to the EU
- The EU performs better than the other trading partners on adherence to international rules, respect for human rights and social progressivity
- China performs poorly on these three metrics where it is strongly net negative

Q14. In this section, we seek to understand your opinions of Australia and some of its largest trading partners. We will present you with pairs of opposite adjectives (e.g., friendly - unfriendly, safe - unsafe) related to Australia and these trading partners. For each pair, please indicate where your feelings towards Australia and each trading partner fall on a scale between these two opposites.

The EU's worst result was on interest in Australia and the Indo-Pacific region.

Summary – Sentiment Towards Australia and Trading Partners (2/2)

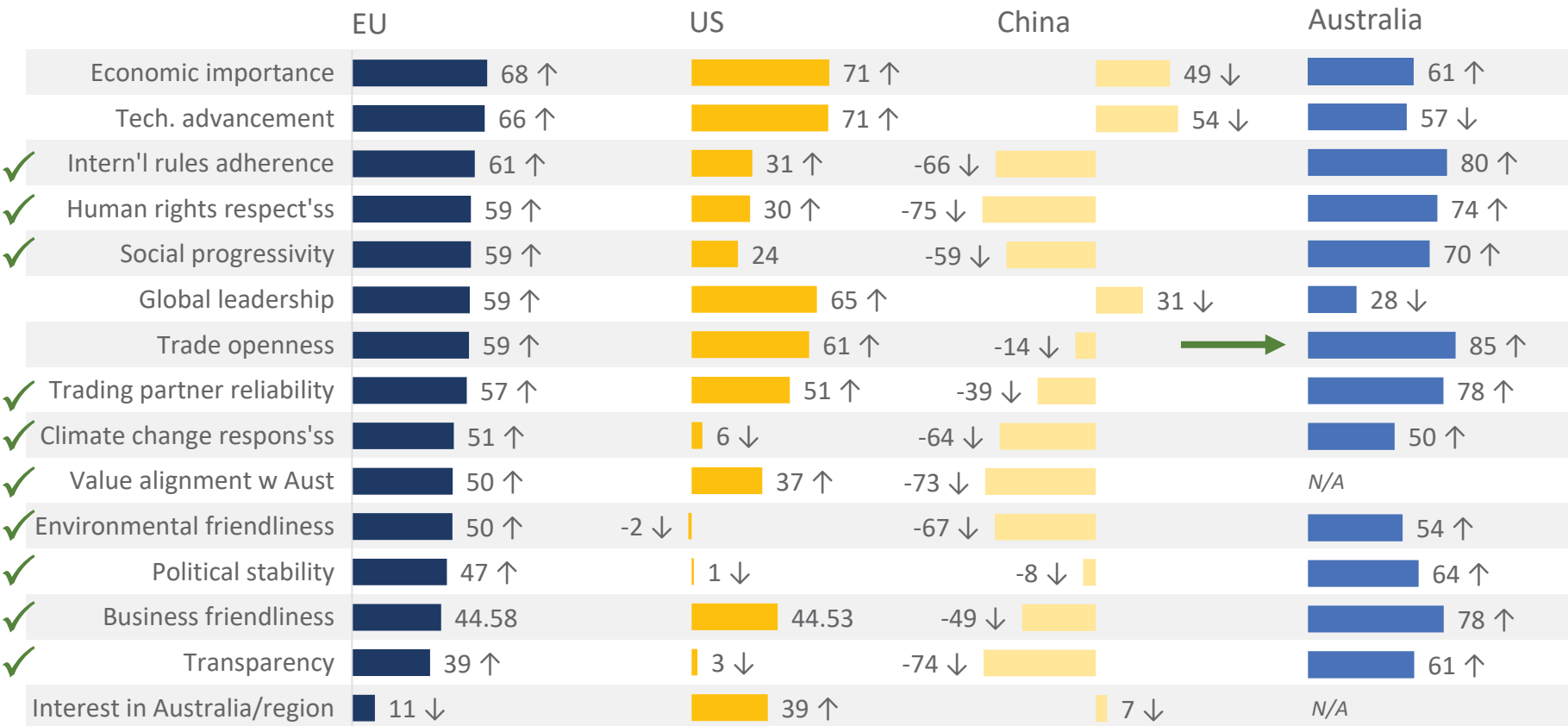


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On ten out of 15 indicators the EU outperforms both China and the US.

Net Positive Sentiment Towards Australia and Trading Partners



↑↓ Denotes statistically significant horizontally

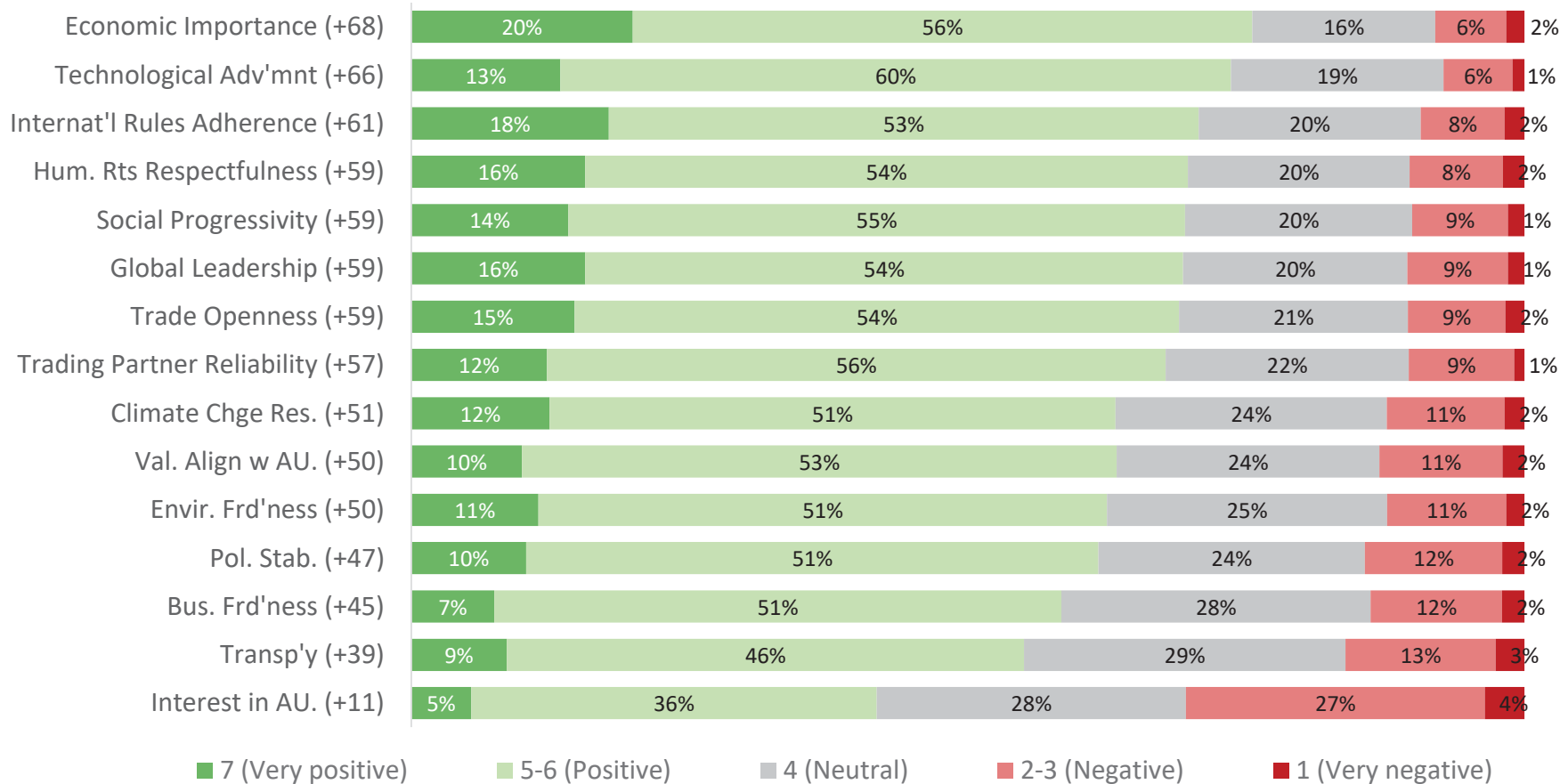
Sorted EU Net Positive: % Positive (5+6+7) – % Negative (1+2+3)

- The EU is clearly a highly respected trading partner for Australia: on 10 out of 15 indicators, the EU outperforms both China and the US
- **Australia scores highly among Australian voters on 'trade openness'**
- There are 7 areas where the EU is very strongly differentiated from the US:
 - Adherence to international rules,
 - Respect for human rights,
 - Social progressivity,
 - Climate change responsiveness,
 - Environmental friendliness,
 - Political stability and
 - Transparency

Q14. In this section, we seek to understand your opinions of Australia and some of its largest trading partners. We will present you with pairs of opposite adjectives (e.g., friendly - unfriendly, safe - unsafe) related to Australia and these trading partners. For each pair, please indicate where your feelings towards Australia and each trading partner fall on a scale between these two opposites.

Voters rank EU strongest on economic importance and tech advancement.

Summary – Sentiment Towards European Union

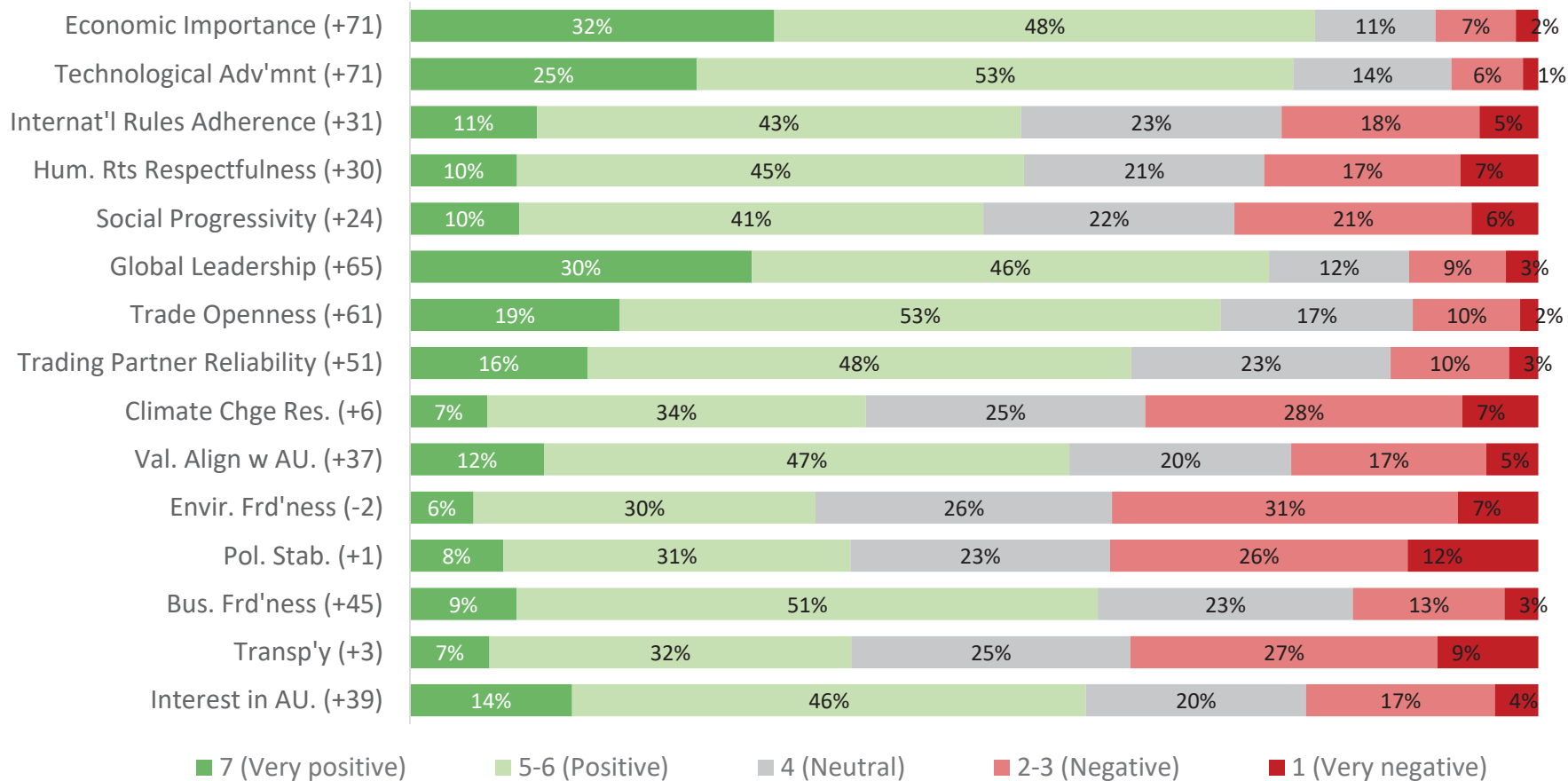


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The US scores well on global leadership.

Summary – Sentiment Towards United States

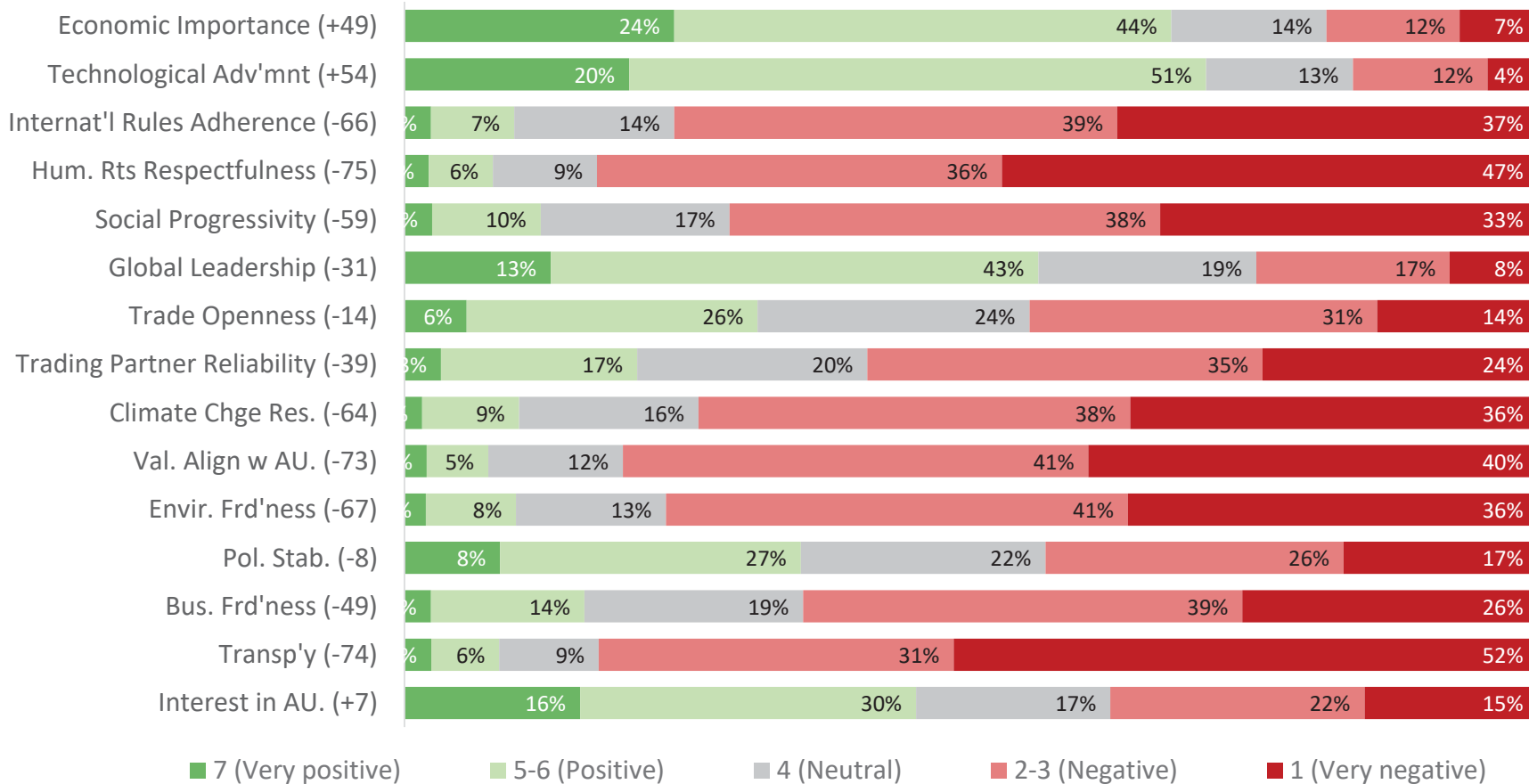


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China performs strongly on economic importance and tech advancement.

Summary – Sentiment Towards China

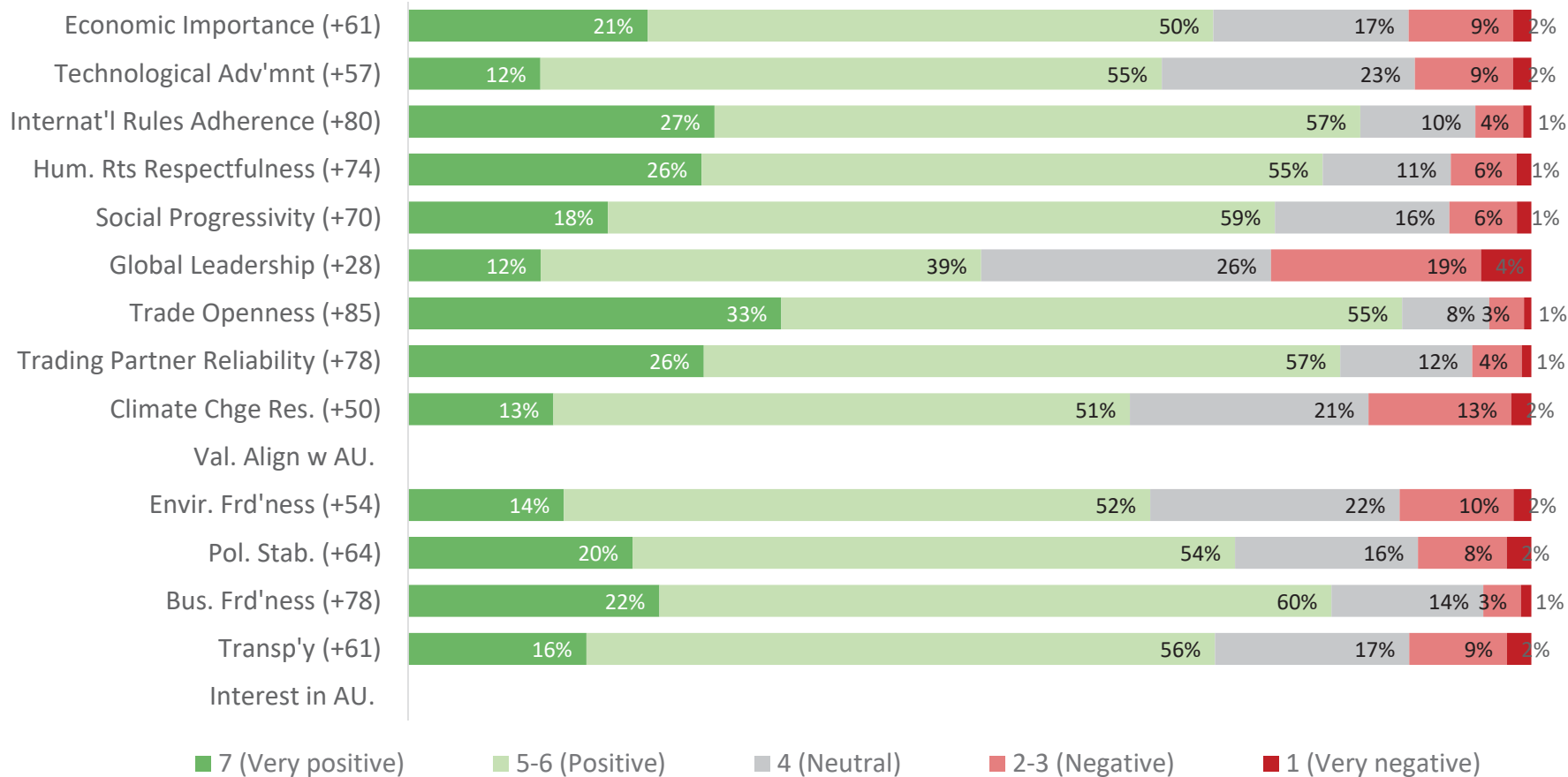


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Australian voters see their own nation as very open on trade.

Summary – Sentiment Towards Australia



Sorted by EU Net Positive: % Positive (5+6+7) – % Negative (1+2+3). N.B All labels shortened

Q14. In this section, we seek to understand your opinions of Australia and some of its largest trading partners. We will present you with pairs of opposite adjectives (e.g., friendly - unfriendly, safe - unsafe) related to Australia and these trading partners. For each pair, please indicate where your feelings towards Australia and each trading partner fall on a scale between these two opposites.

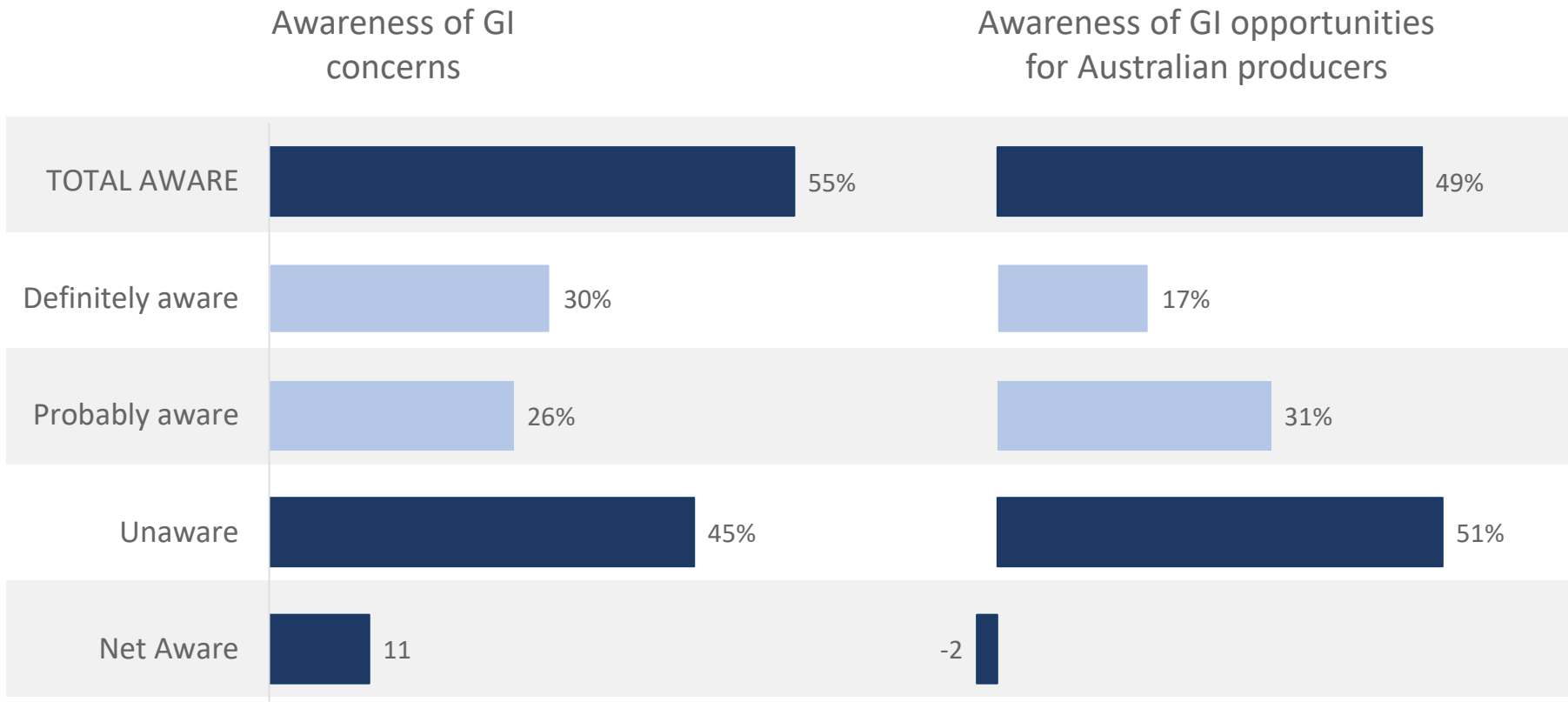
Geographical Indications



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Voters are more aware of the concerns around GIs than of opportunities.



Net Aware: % Total Aware (Definitely aware + Probably aware) - % Unaware

Q22a. Before today, were you aware that some Australian producers are concerned the Free Trade Agreement with Europe might restrict them from using some European geographical names in their products?

Q22b. Before today, were you aware that some Australian producers would like the option of registering a geographical name to give them additional options to distinguish, promote and sell their products for a premium?

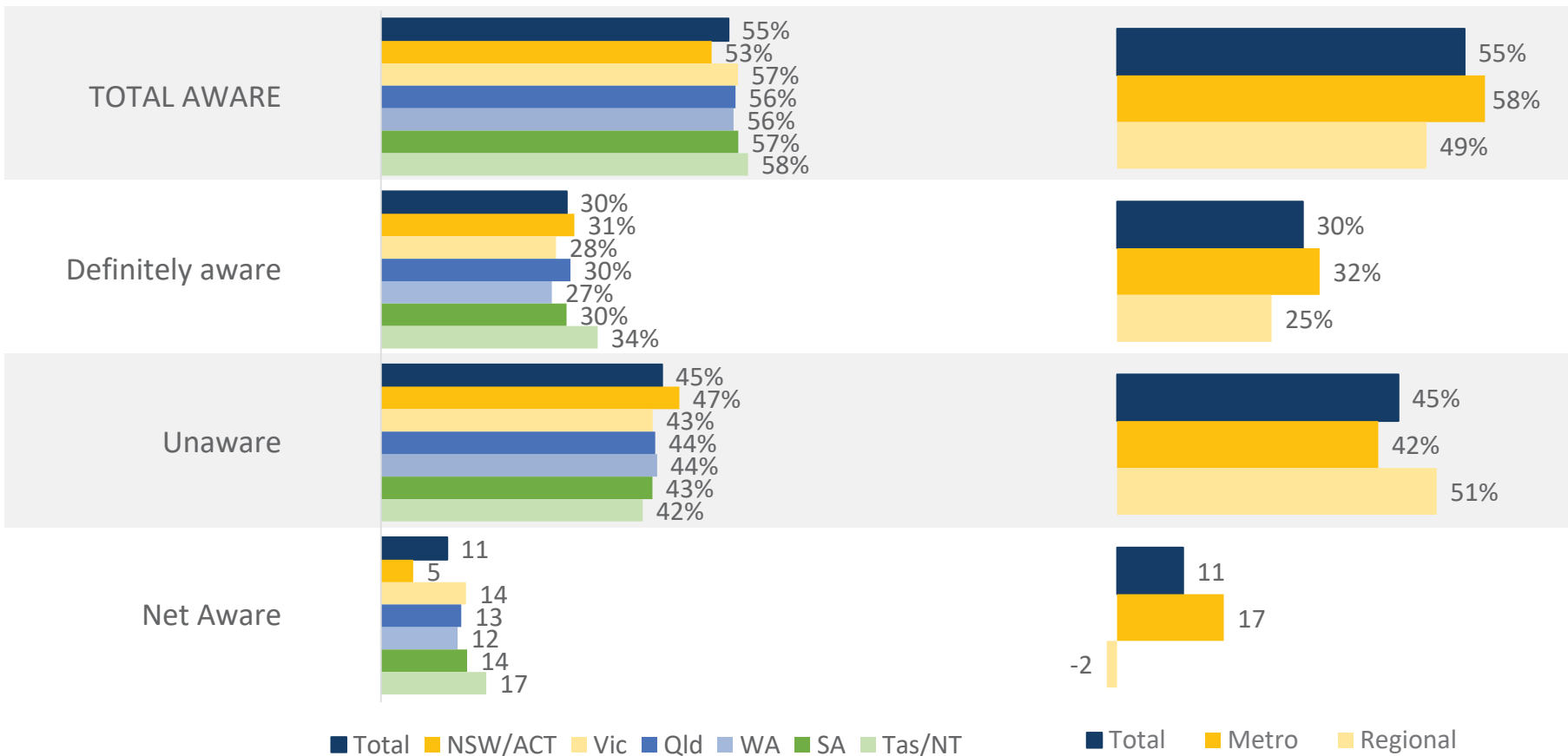
- Nearly a third of voters are aware of the concerns regarding GIs that might result from the FTA
- By contrast, only one in six are aware that GIs might have benefits for Australian producers
- Those purchasing an EU product in the past 3 months are more likely to be aware of the concerns (66% total aware) and opportunities (60% total aware)

Metro voters are more aware of the concerns around GIs in the FTA.

Awareness of producer concerns around GIs by location

By Geographics

By Location

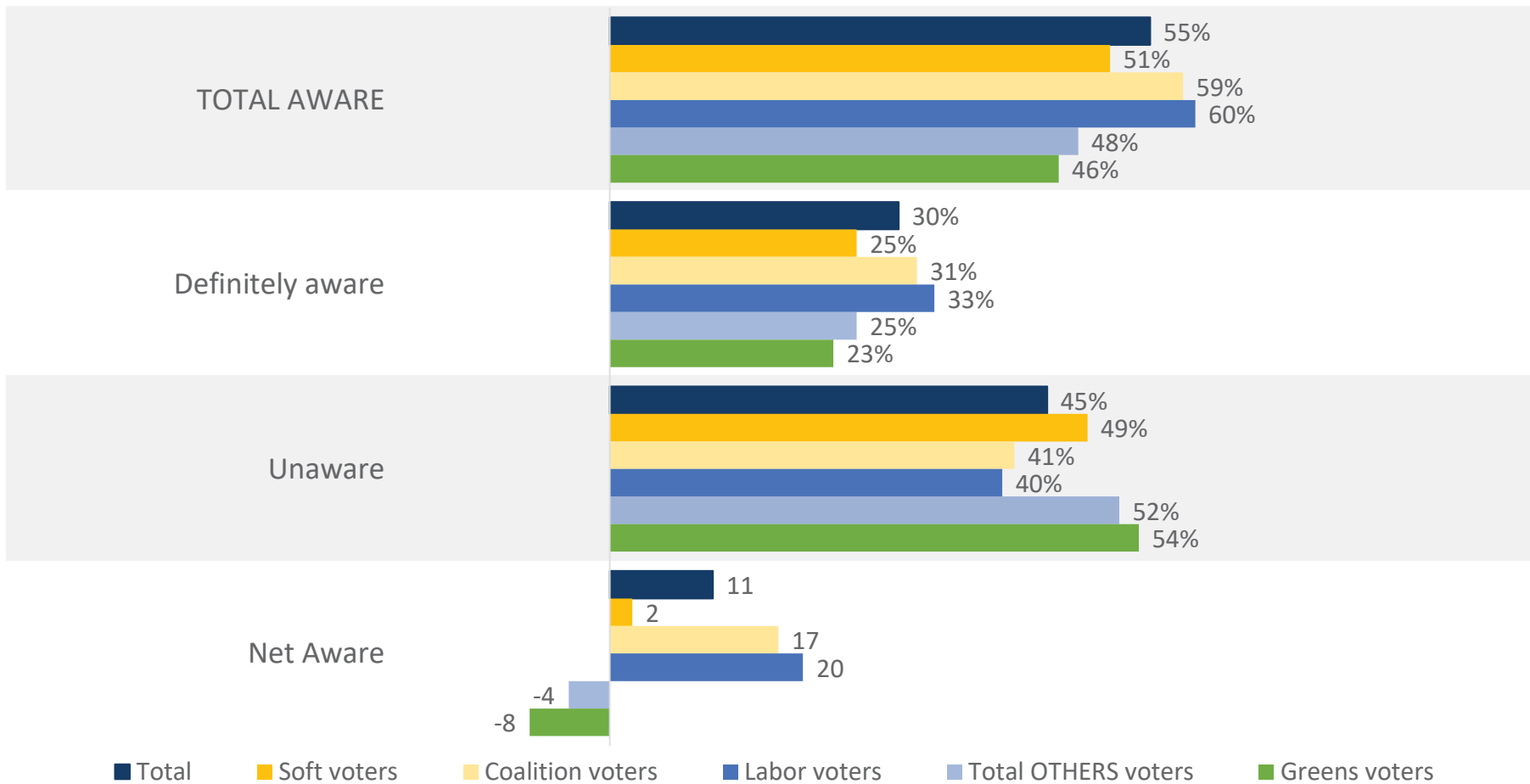


Net Aware: % Total Aware (Definitely aware + Probably aware) - % Unaware

Q22a. Before today, were you aware that some Australian producers are concerned the Free Trade Agreement with Europe might restrict them from using some European geographical names in their products?

Labor and Coalition voters more aware of GI concerns in the FTA.

Awareness of producer concerns around GIs – By Voting Intention



Net Aware: % Total Aware (Definitely aware + Probably aware) - % Unaware

Q22a. Before today, were you aware that some Australian producers are concerned the Free Trade Agreement with Europe might restrict them from using some European geographical names in their products?

Annex



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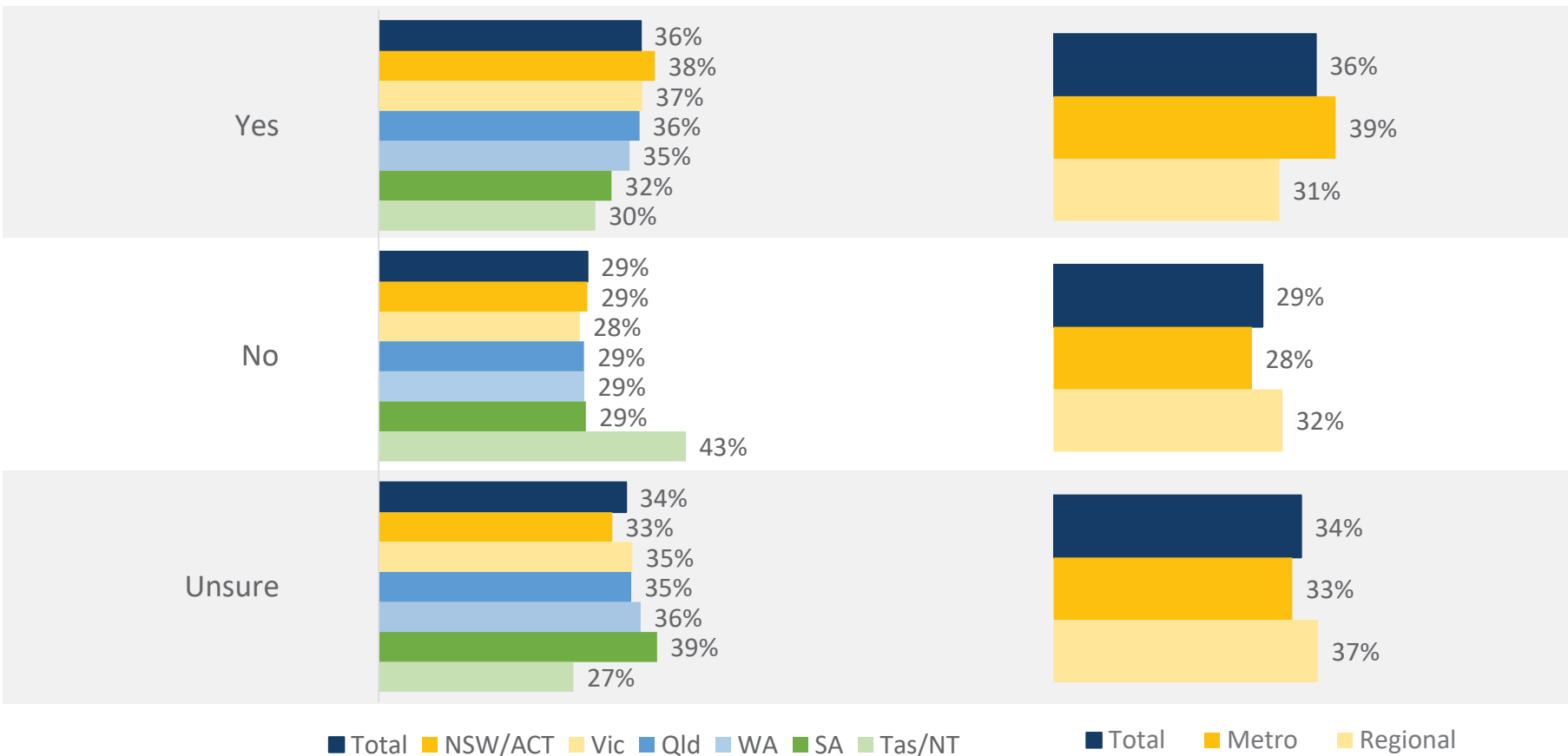


More than a third have purchased a European product in the past 3 months.

Purchased a European Product in Past 3 Months

By Geographics

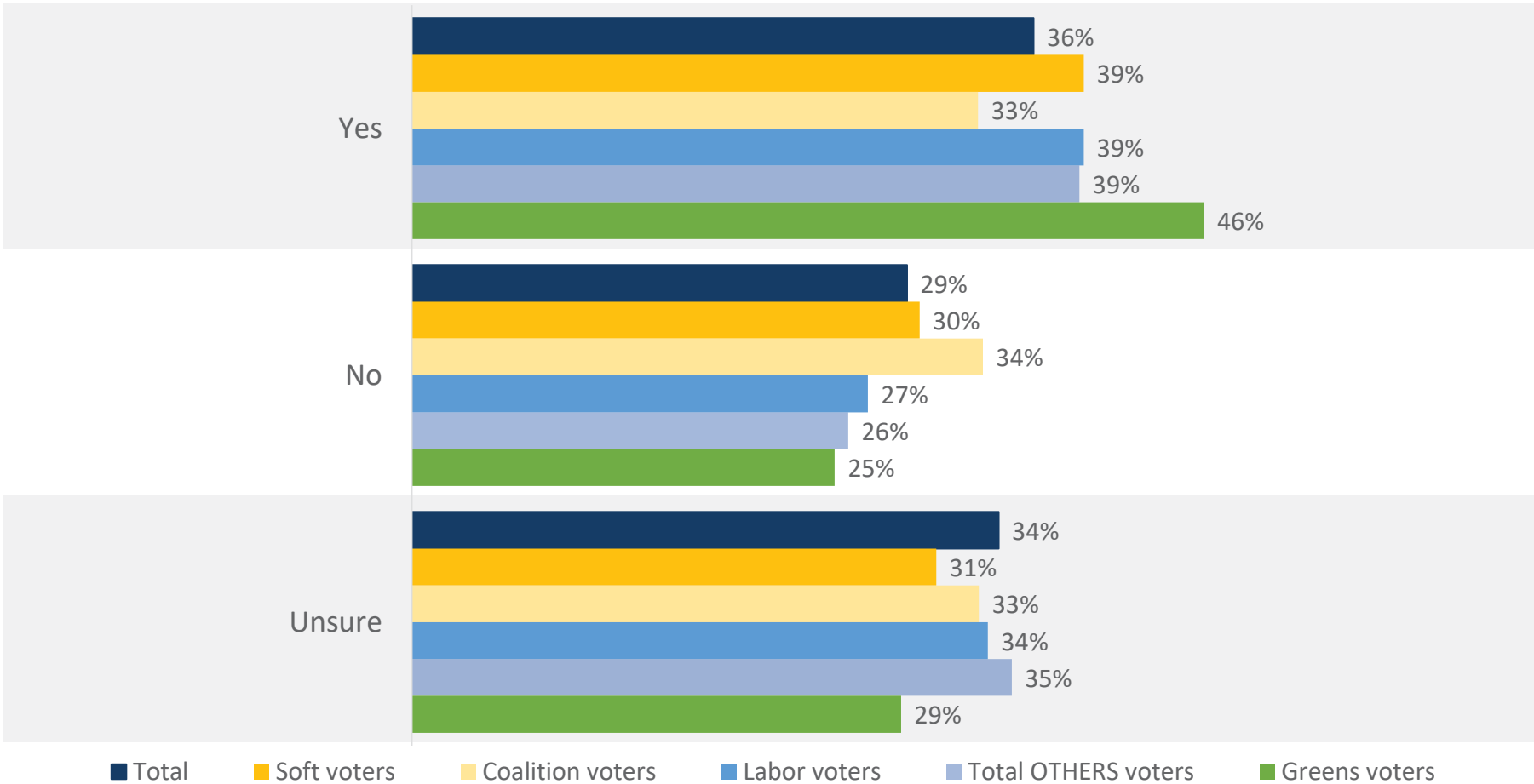
By Location



Q23. Have you purchased a European product in the past 3 months either in an Australian store or online?

Greens voters more likely to have bought a product from Europe.

Purchased a European Product in Past 3 Months – By Voting Intention



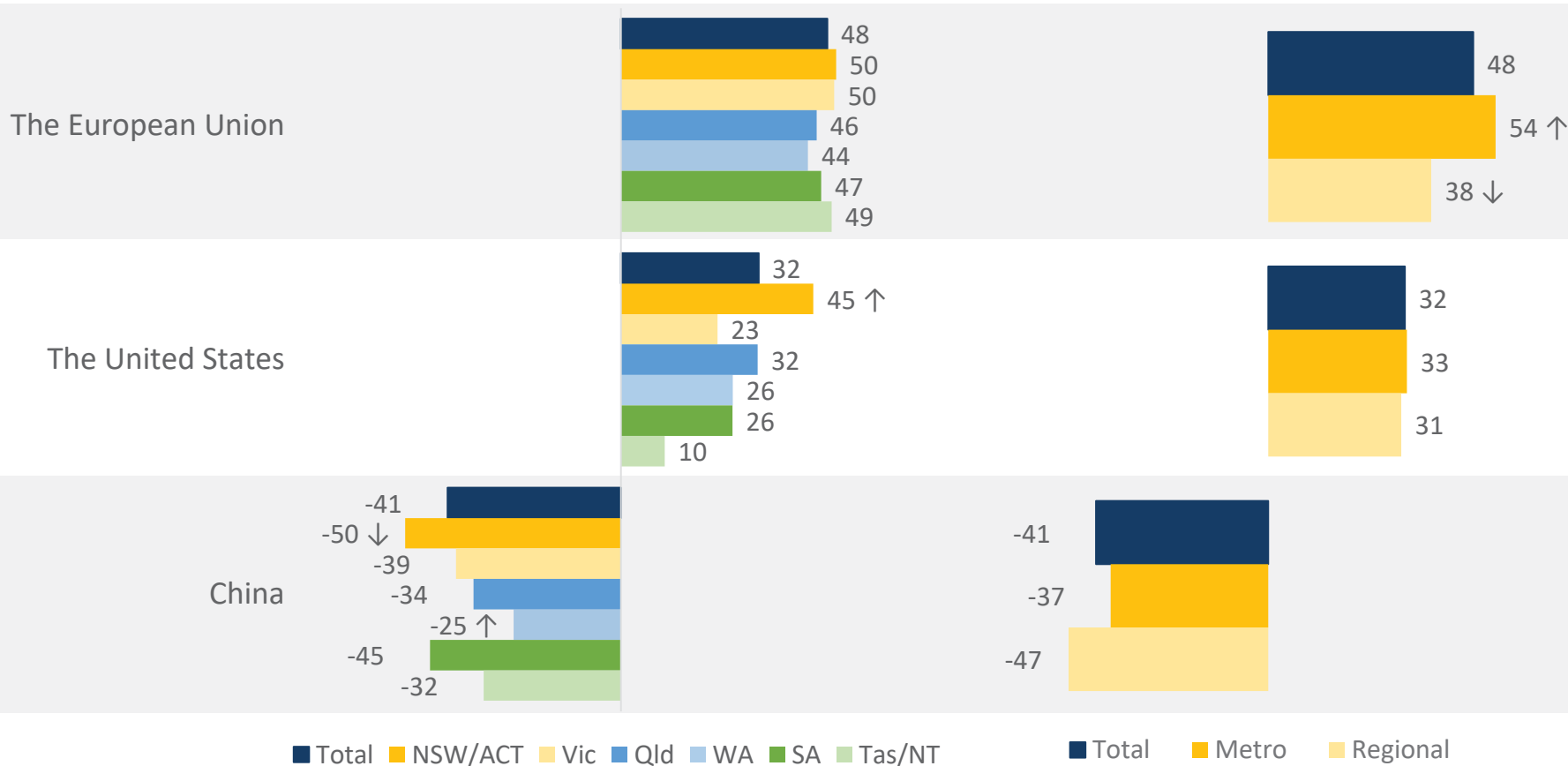
Q23. Have you purchased a European product in the past 3 months either in an Australian store or online?

Likeability of the EU is consistent across Australia, though stronger in metro areas.

Net Favourability Towards Trading Partners

By Geographics

By Location

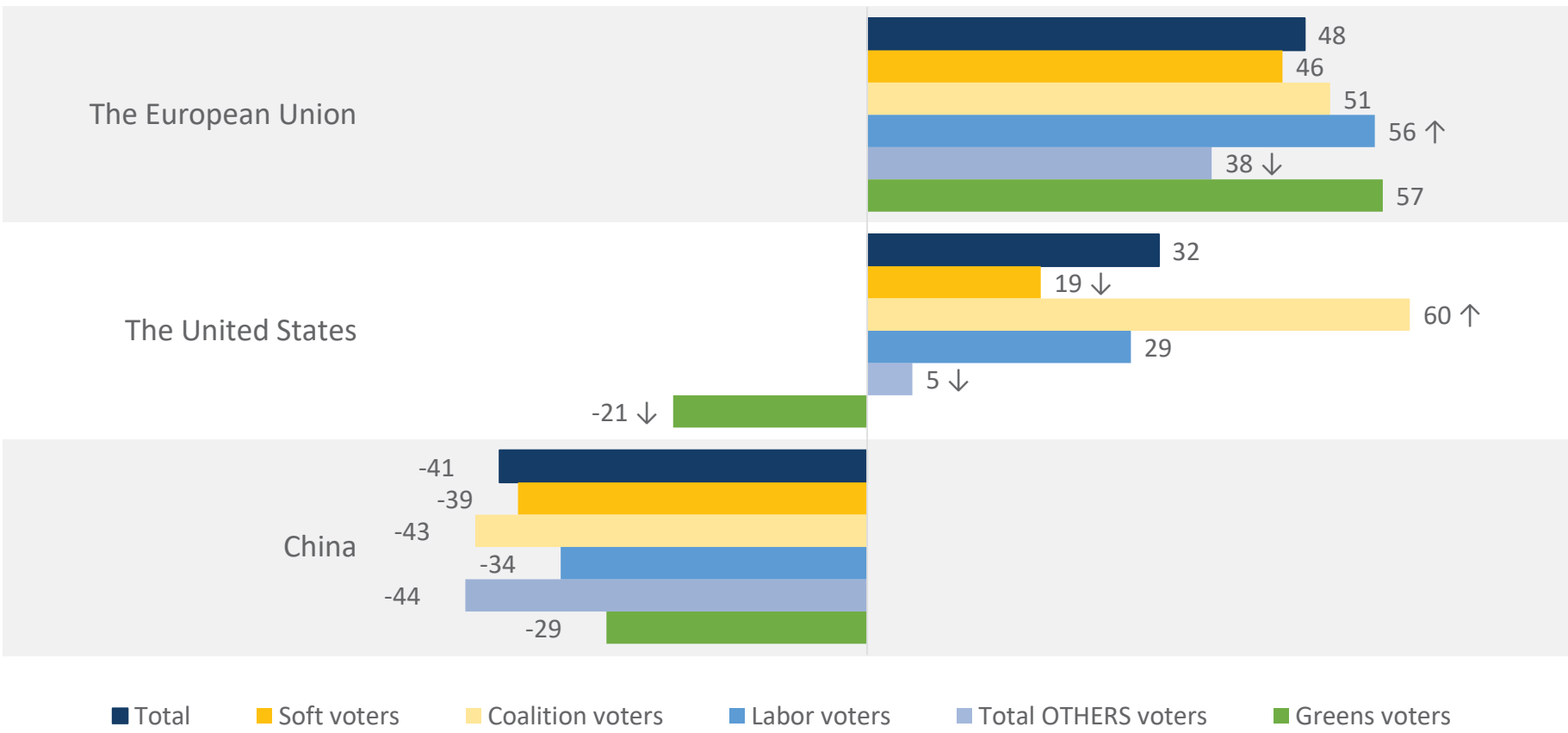


Net Favourable: % Total Favourable - % Total Unfavourable

Q12. And here are some of Australia's largest trading partners. For each please indicate whether you have a favourable, unfavourable or neutral view of them overall. If you have never heard of them, that's fine, just mark 'Never heard of'.

Liking for the US is heavily driven by Coalition voters.

Net Favourability Towards Trading Partners – By Voting Intention



Net Favourable: % Total Favourable - % Total Unfavourable

Q12. And here are some of Australia's largest trading partners. For each please indicate whether you have a favourable, unfavourable or neutral view of them overall. If you have never heard of them, that's fine, just mark 'Never heard of'.

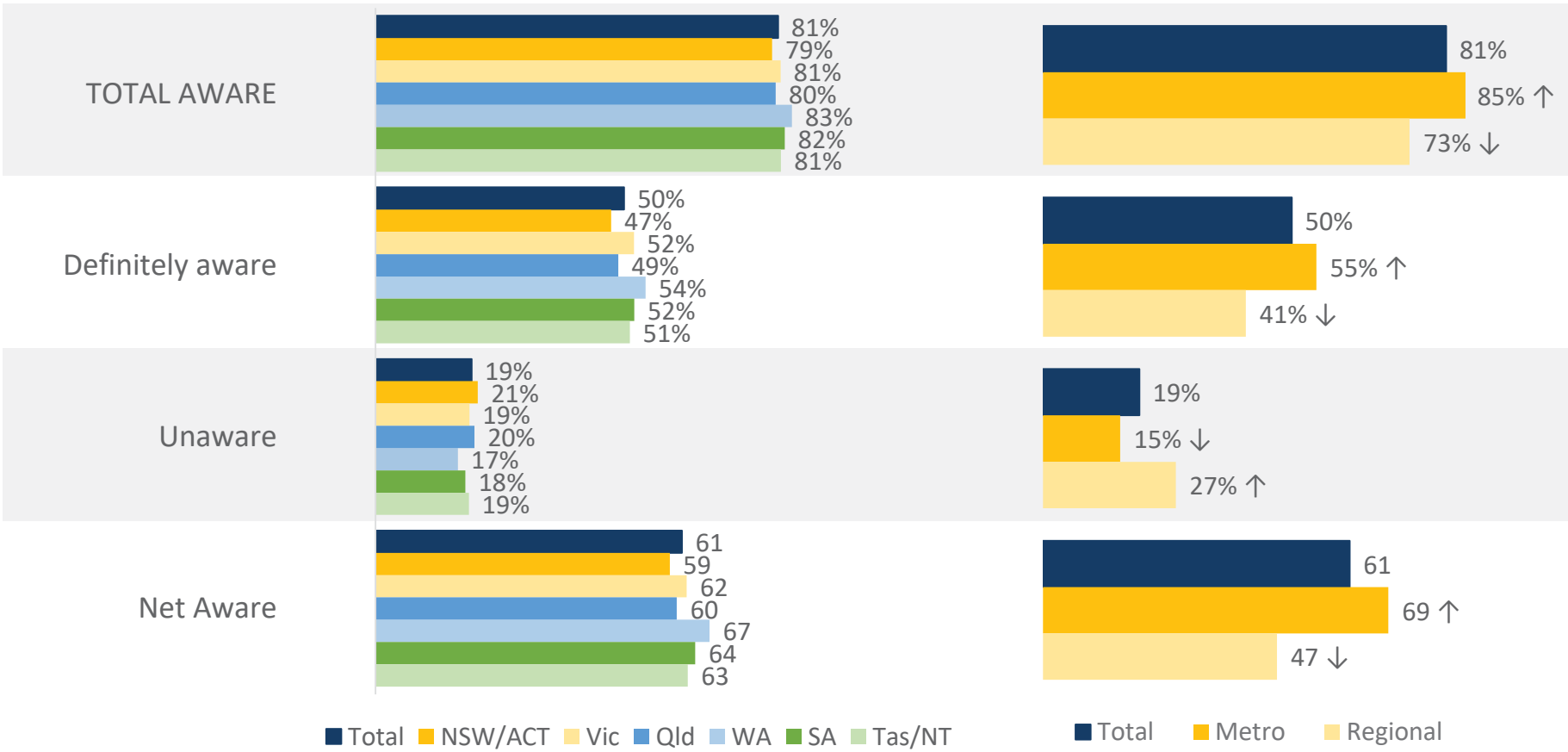
Definitions: Coalition: the Liberal / Nationals Coalition currently the Opposition; Others voters: voters for parties other than Labor or the Coalition; Soft voters: voters who are not committed to their current voting intention and may change their vote

Awareness of the EU is consistent across the states but higher in metro areas.

Awareness of EU's Unique 27 Country Partnership

By Geographics

By Location

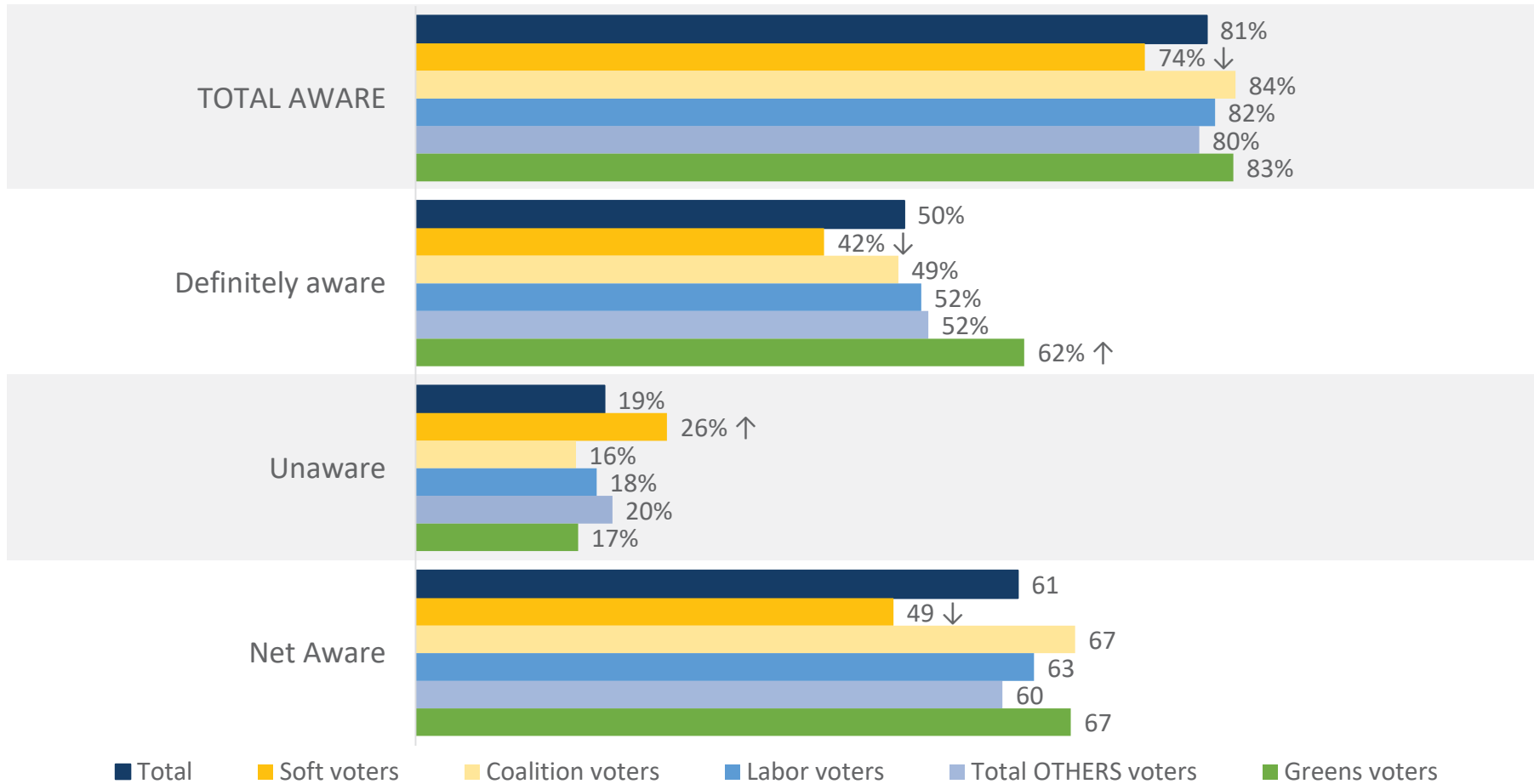


Net Aware: % Total Aware (Definitely aware + Probably aware) - % Unaware

Q13. Were you aware that the European Union is a unique partnership of 27 countries in Europe? One way they act together is through establishing a common trade approach with countries like Australia.

Soft voters – whom parties must win over to govern – are less aware of the EU.

Awareness of EU's Unique 27 Country Partnership – By Voting Intention

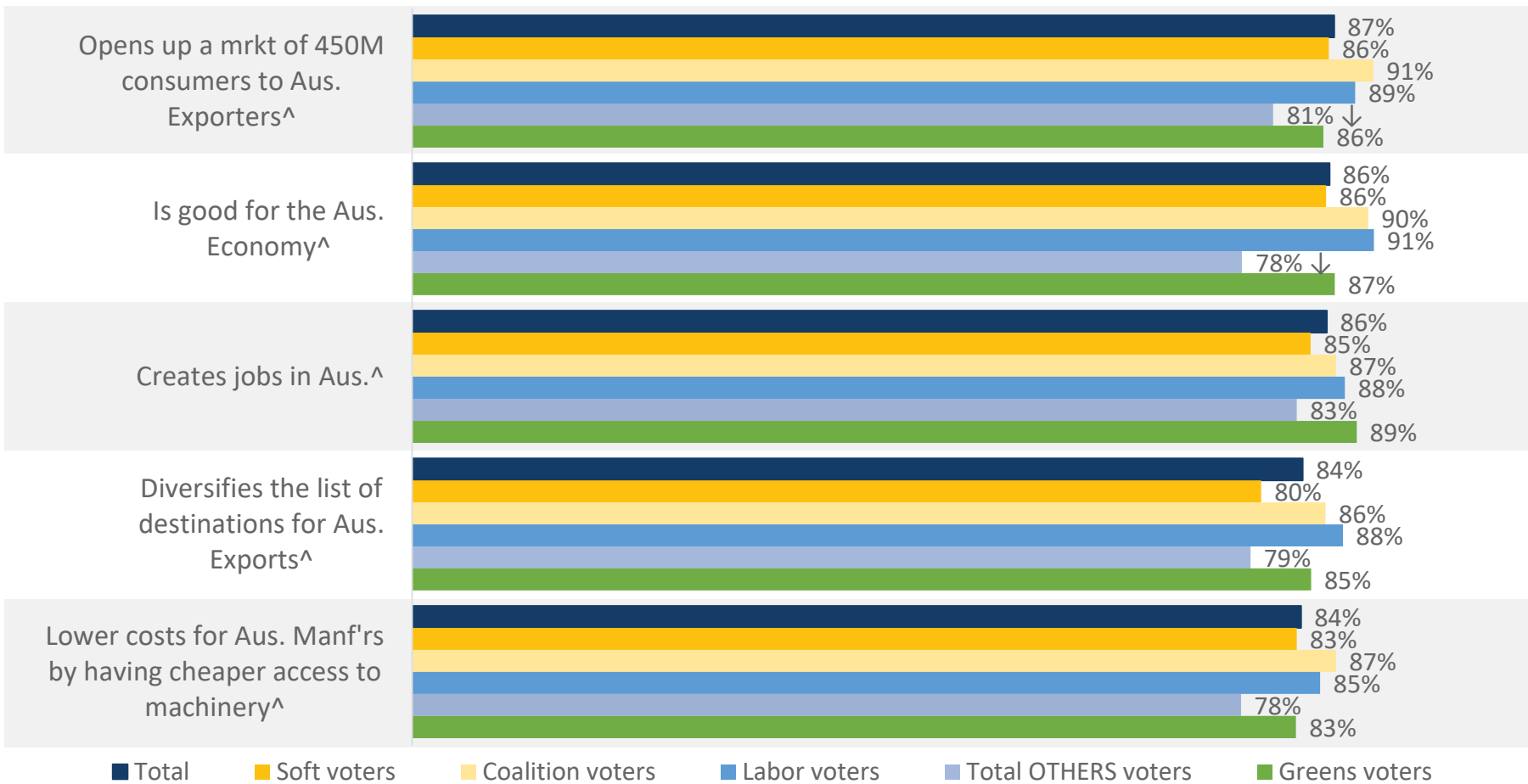


Net Aware: % Total Aware (Definitely aware + Probably aware) - % Unaware

Q13. Were you aware that the European Union is a unique partnership of 27 countries in Europe? One way they act together is through establishing a common trade approach with countries like Australia.

Minor party voters find the economic benefits of an EU FTA less important.

Total Importance of Support Messages (1/3)



Sorted by Total Importance: % Very Important + % Somewhat Important

Q19. Here are some potential outcomes from a Free Trade Agreement with the European Union. How important to you personally are each of these potential outcomes?

Coalition voters are impressed by the removal of red tape for Aust'n businesses.

Total Importance of Support Messages (2/3)



Sorted by Total Importance: % Very Important + % Somewhat Important

Q19. Here are some potential outcomes from a Free Trade Agreement with the European Union. How important to you personally are each of these potential outcomes?

Major party voters see the importance of accessing finance from Europe.

Total Importance of Support Messages (3/3)

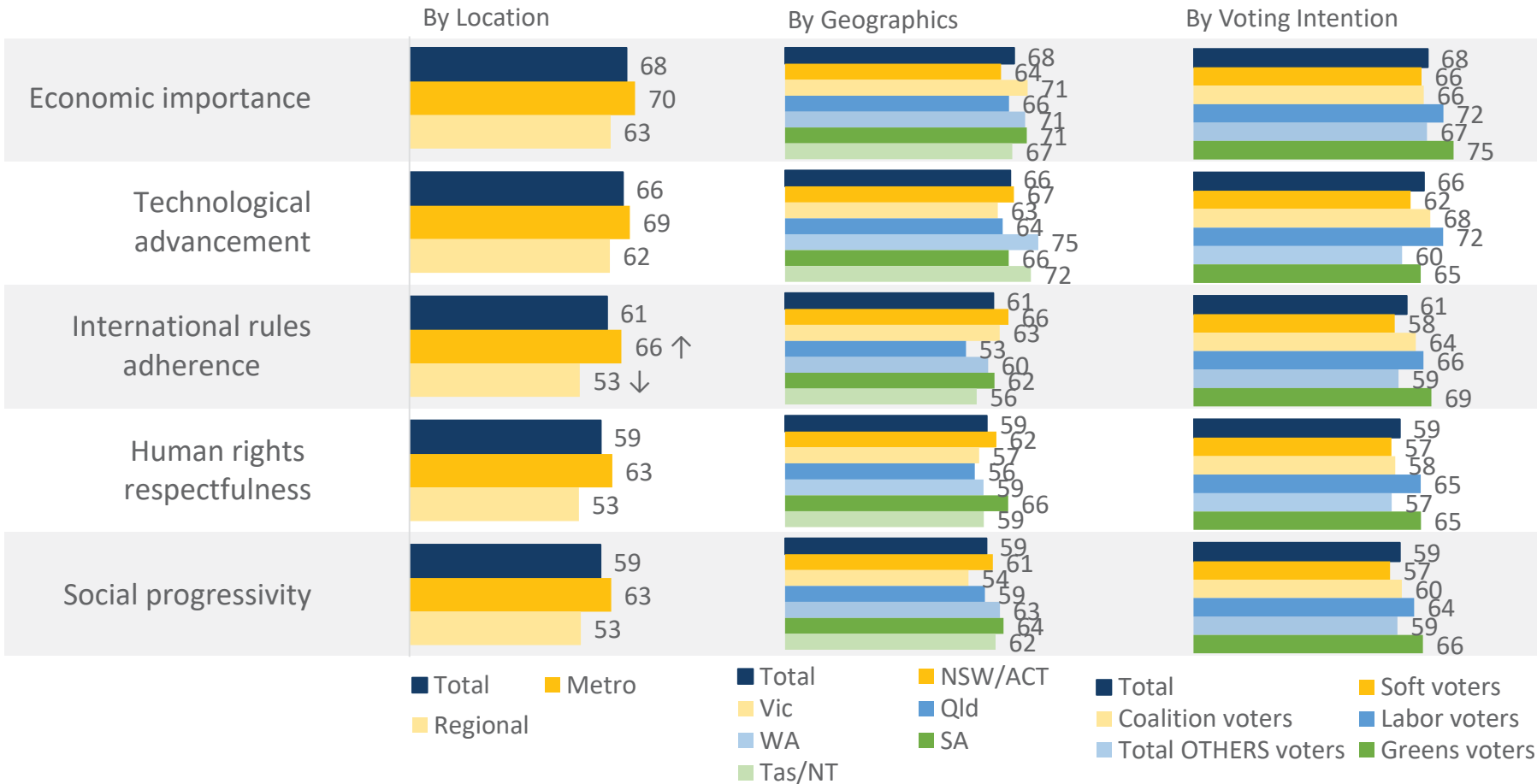


Sorted by Total Importance: % Very Important + % Somewhat Important

Q19. Here are some potential outcomes from a Free Trade Agreement with the European Union. How important to you personally are each of these potential outcomes?

Comparison by standard breakdown groups.

Net Positive Sentiment Towards **European Union** – By Key Subgroups (1/3)

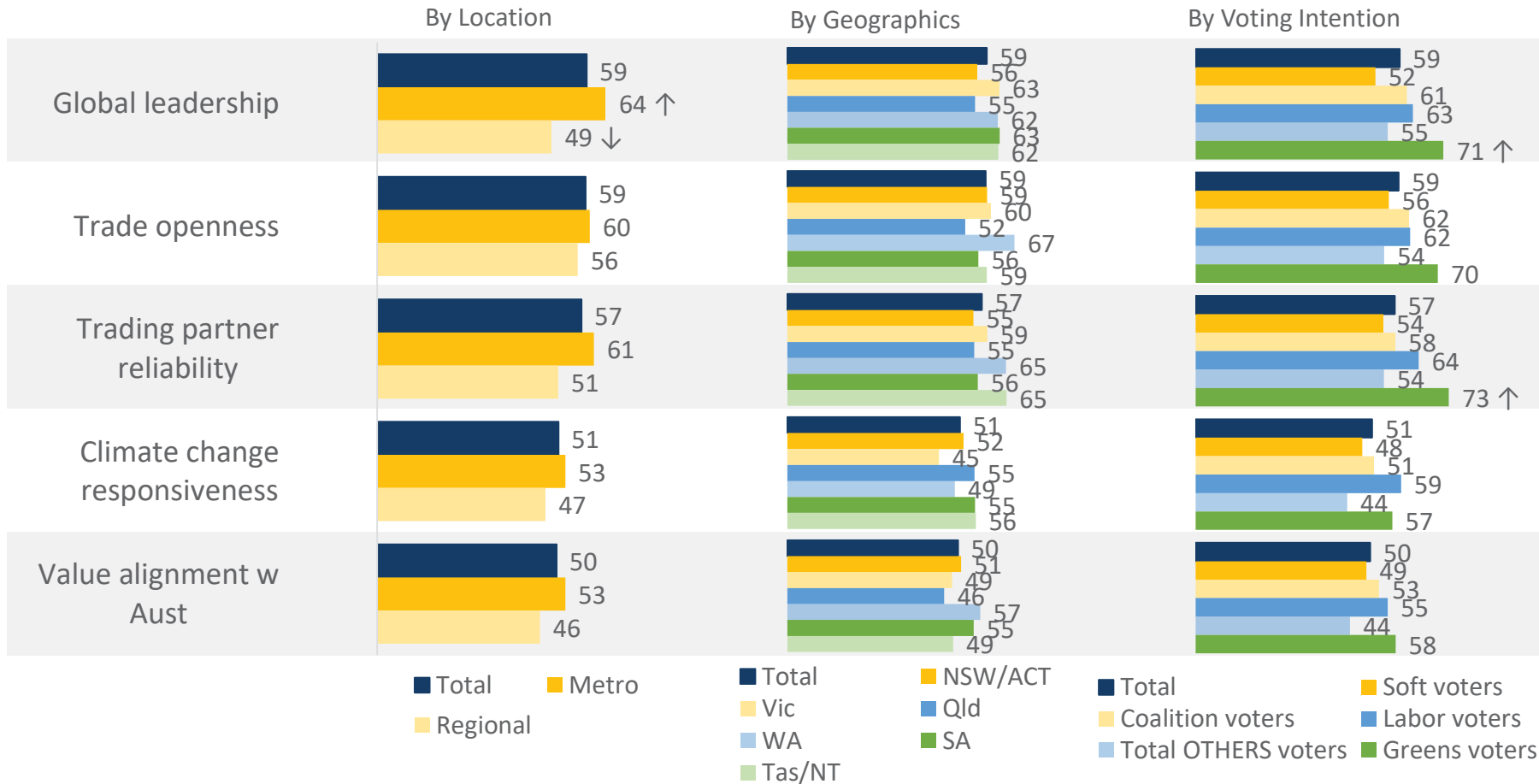


Sorted EU Net Positive: % Positive (5+6+7) – % Negative (1+2+3)

Q14. In this section, we seek to understand your opinions of Australia and some of its largest trading partners. We will present you with pairs of opposite adjectives (e.g., friendly - unfriendly, safe - unsafe) related to Australia and these trading partners. For each pair, please indicate where your feelings towards Australia and each trading partner fall on a scale between these two opposites.

Comparison by standard breakdown groups.

Net Positive Sentiment Towards **European Union** – By Key Subgroups (2/3)

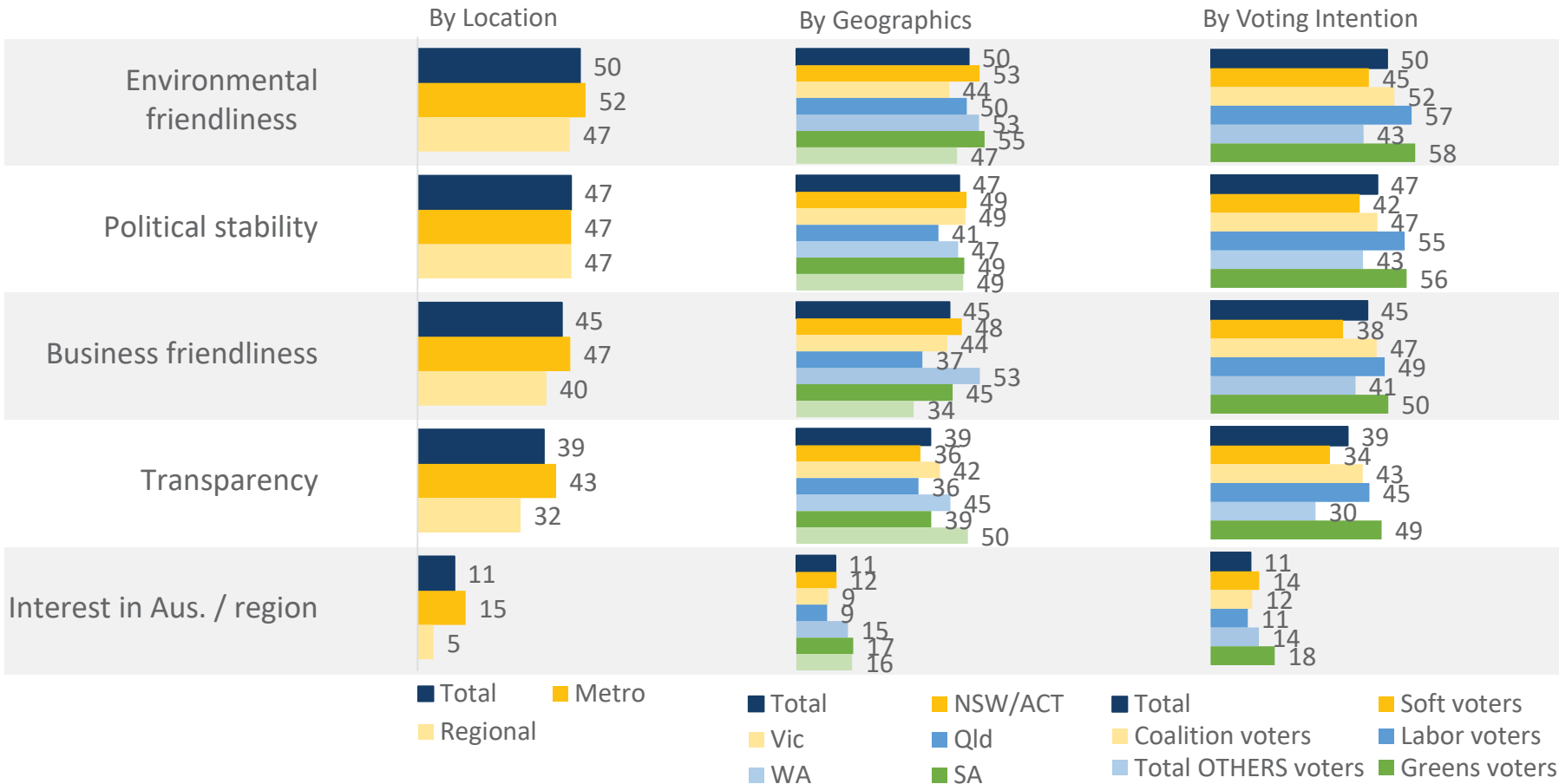


Sorted EU Net Positive: % Positive (5+6+7) – % Negative (1+2+3)

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Comparison by standard breakdown groups.

Net Positive Sentiment Towards **European Union** – By Key Subgroups (3/3)

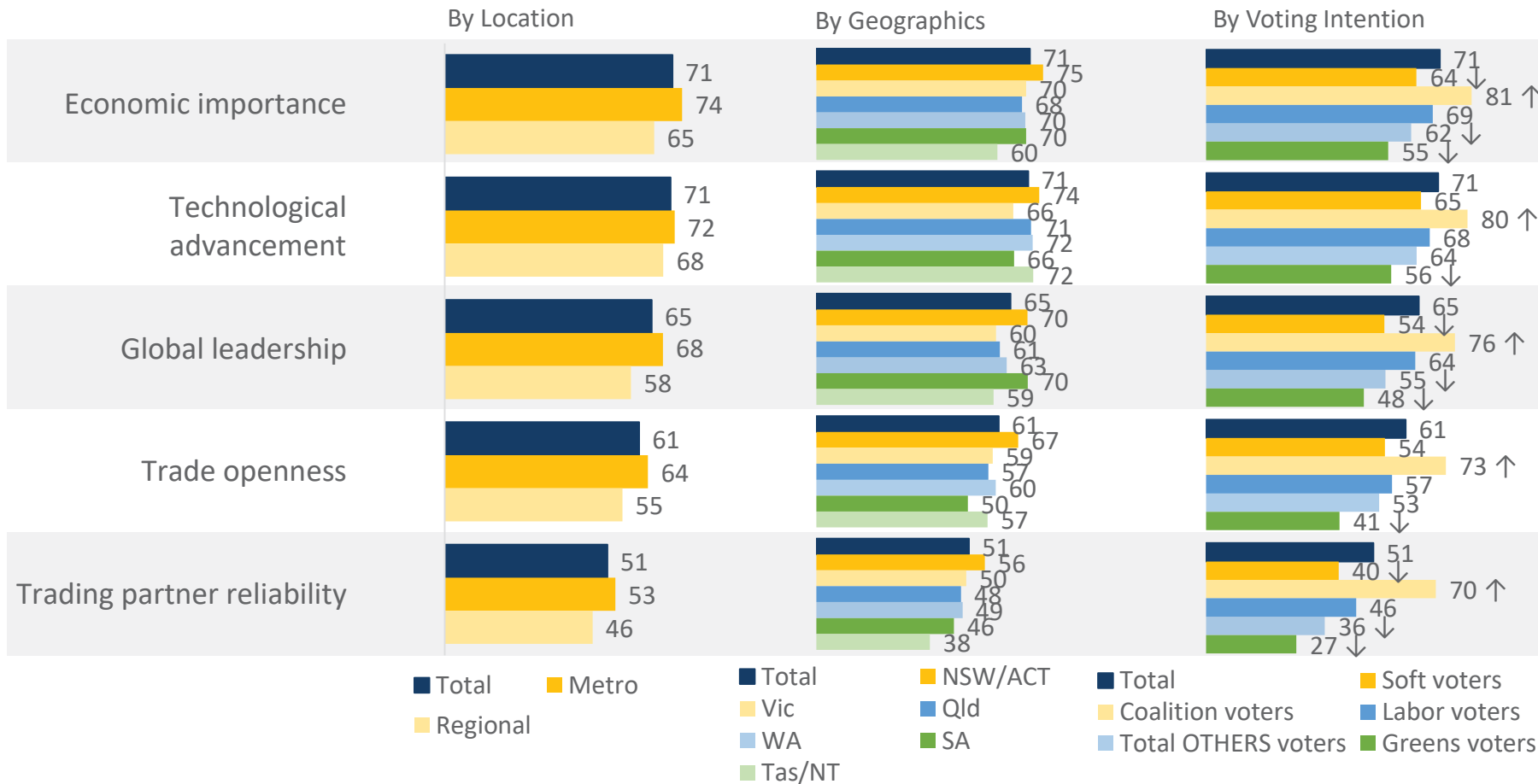


Sorted EU Net Positive: % Positive (5+6+7) – % Negative (1+2+3)

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Comparison by standard breakdown groups.

Net Positive Sentiment Towards US – By Key Subgroups (1/3)

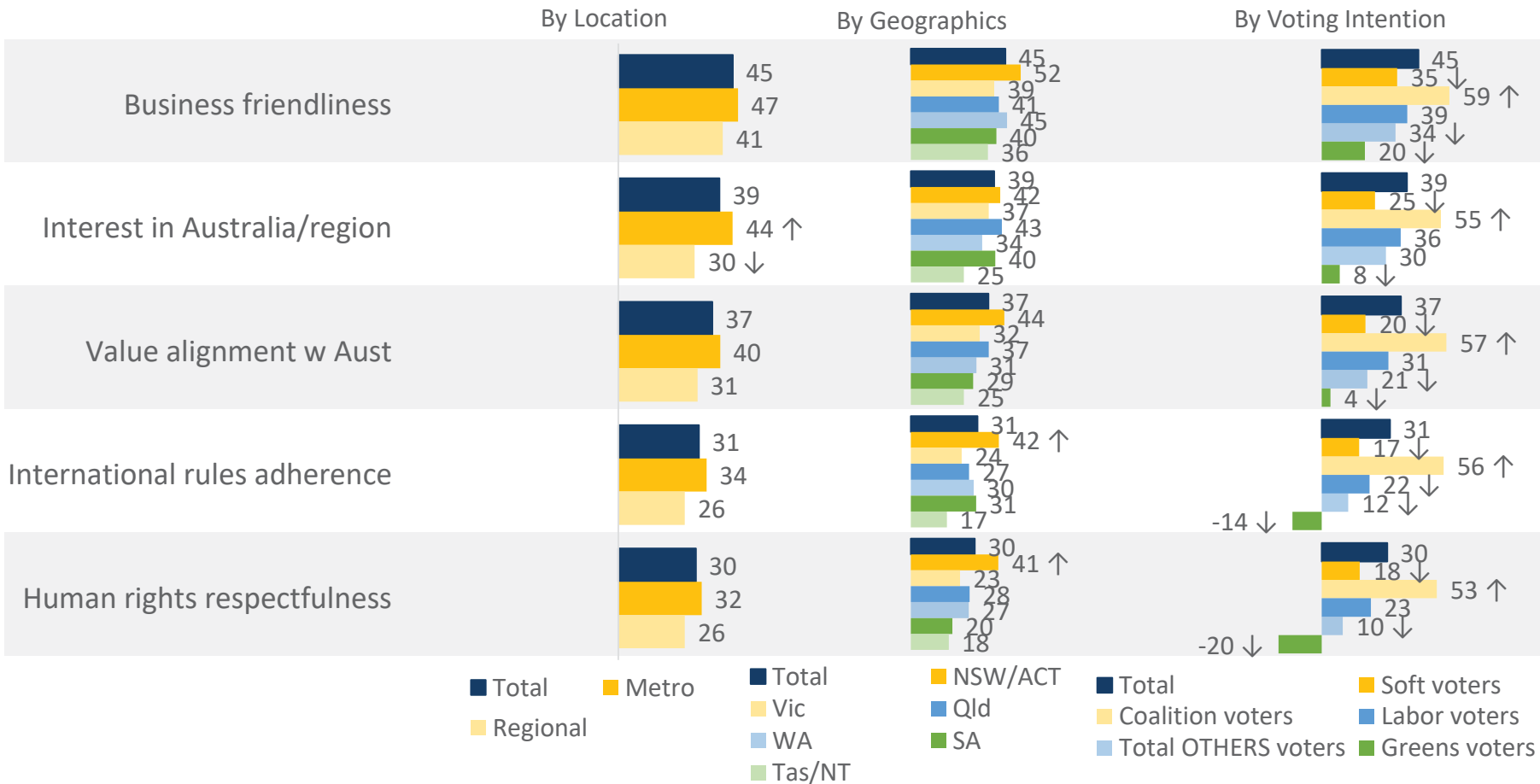


Sorted US Net Positive: % Positive (5+6+7) – % Negative (1+2+3)

Q14. In this section, we seek to understand your opinions of Australia and some of its largest trading partners. We will present you with pairs of opposite adjectives (e.g., friendly - unfriendly, safe - unsafe) related to Australia and these trading partners. For each pair, please indicate where your feelings towards Australia and each trading partner fall on a scale between these two opposites.

Comparison by standard breakdown groups.

Net Positive Sentiment Towards US – By Key Subgroups (2/3)

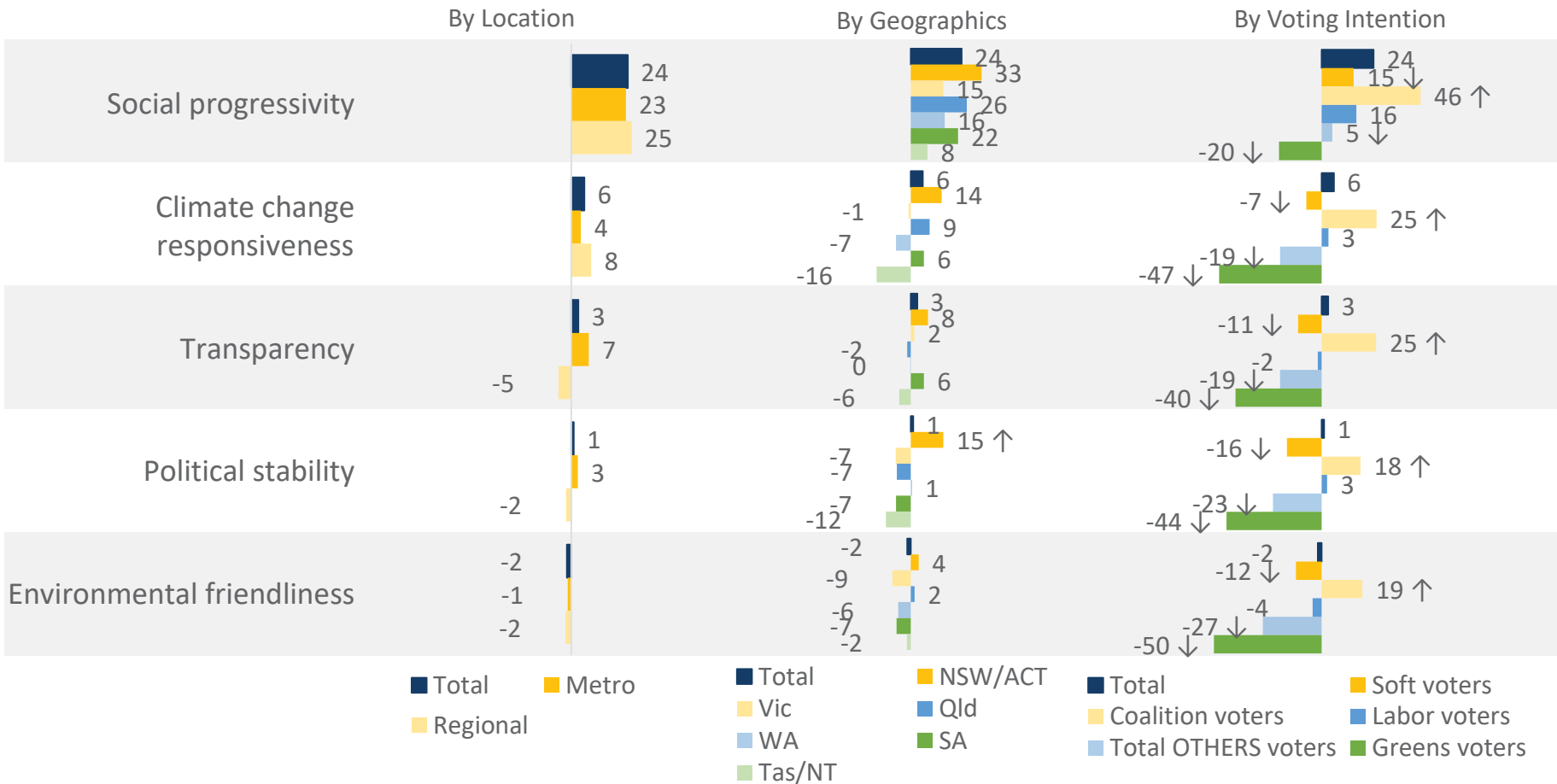


Sorted US Net Positive: % Positive (5+6+7) – % Negative (1+2+3)

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Comparison by standard breakdown groups.

Net Positive Sentiment Towards US – By Key Subgroups (3/3)

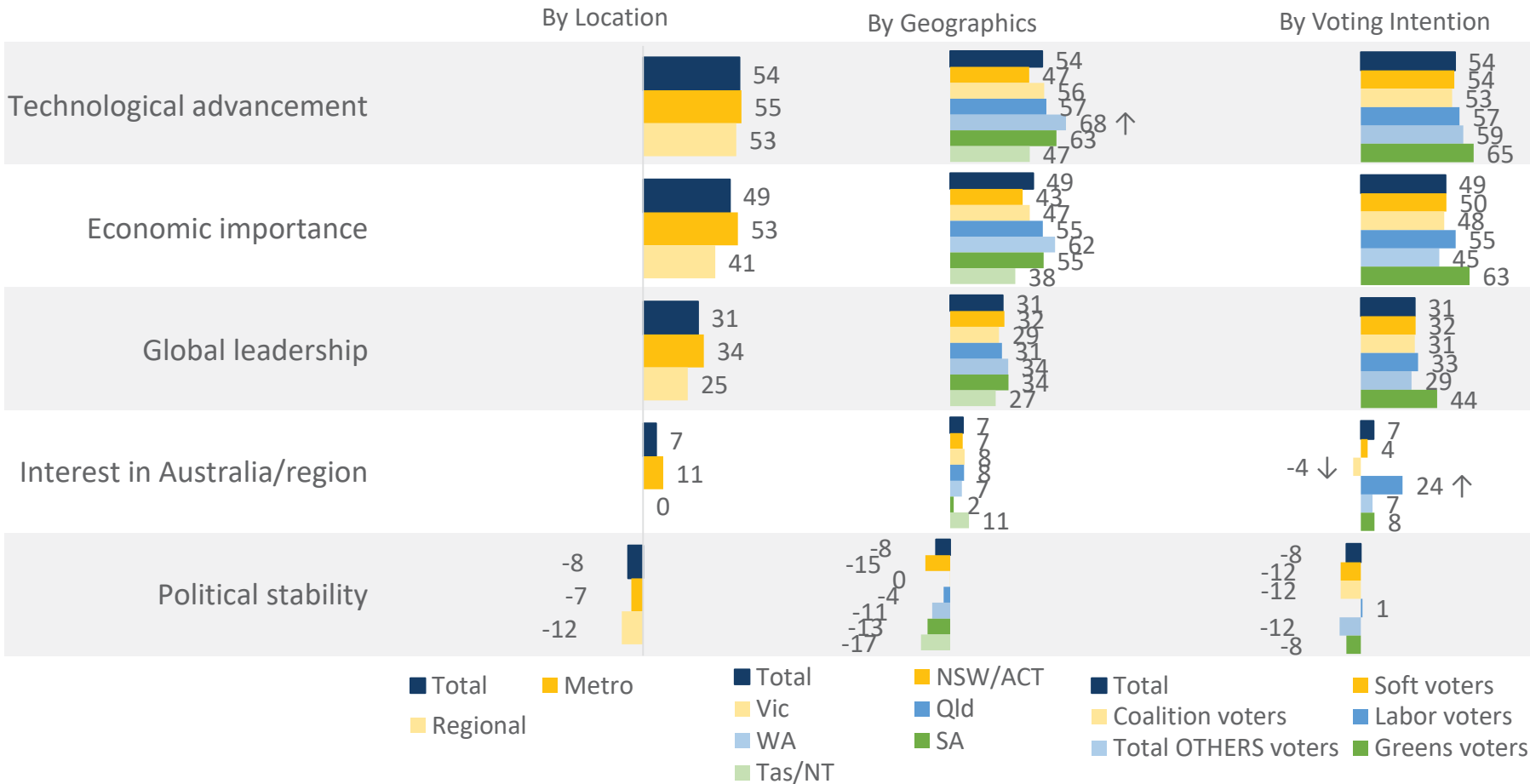


Sorted US Net Positive: % Positive (5+6+7) – % Negative (1+2+3)

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Comparison by standard breakdown groups.

Net Positive Sentiment Towards **China** – By Key Subgroups (1/3)

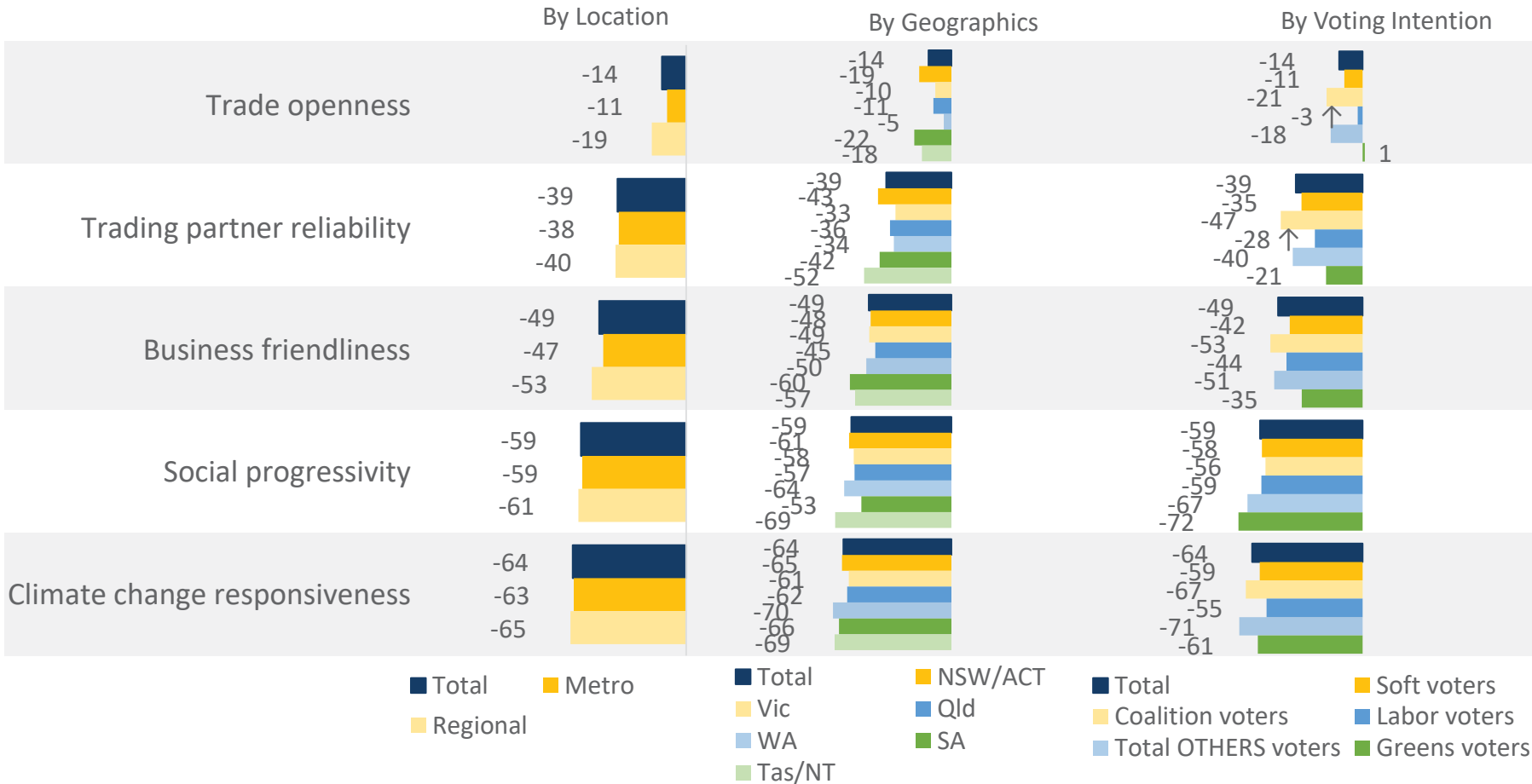


Sorted CHINA Net Positive: % Positive (5+6+7) – % Negative (1+2+3)

Q14. In this section, we seek to understand your opinions of Australia and some of its largest trading partners. We will present you with pairs of opposite adjectives (e.g., friendly - unfriendly, safe - unsafe) related to Australia and these trading partners. For each pair, please indicate where your feelings towards Australia and each trading partner fall on a scale between these two opposites.

Comparison by standard breakdown groups.

Net Positive Sentiment Towards **China** – By Key Subgroups (2/3)

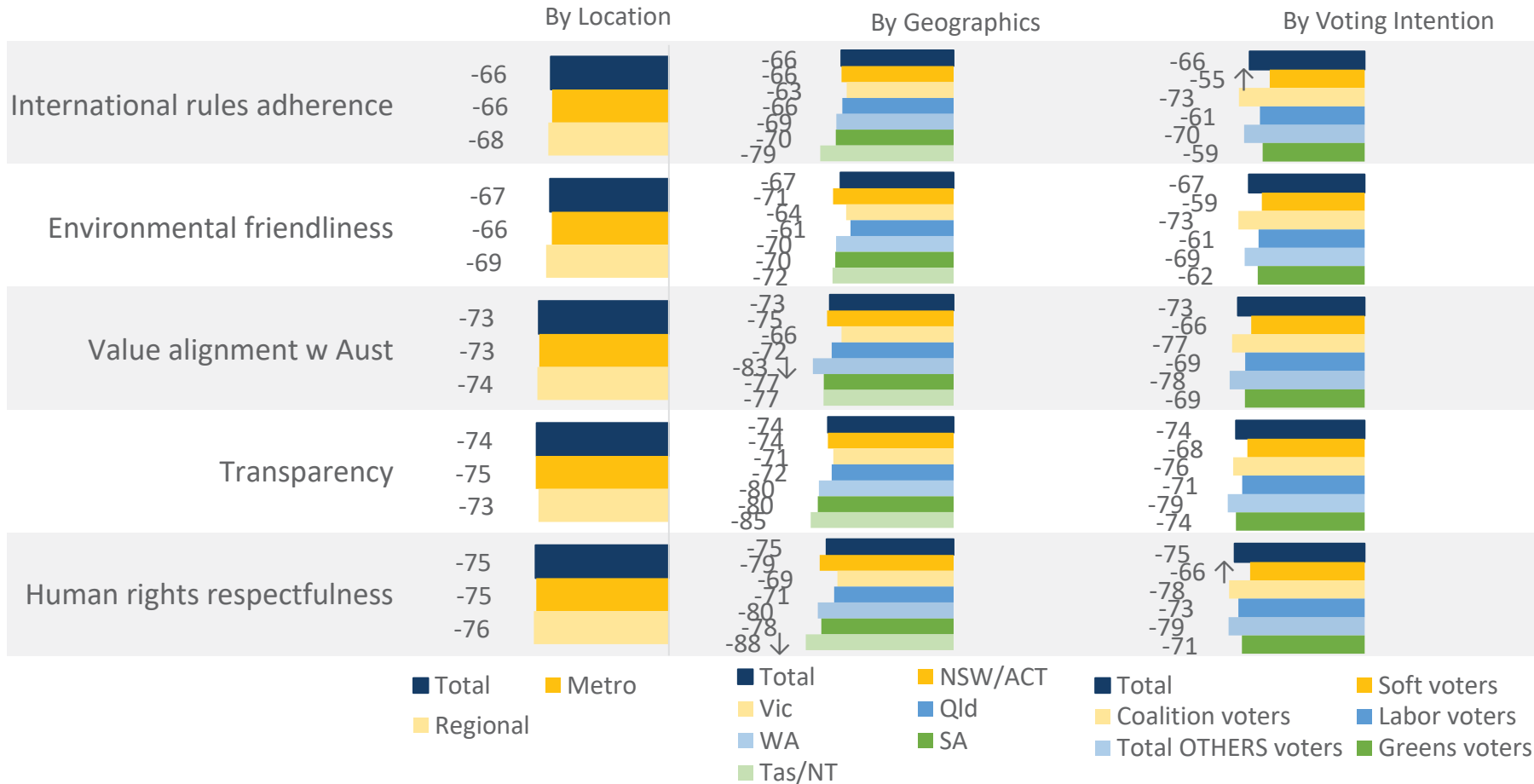


Sorted CHINA Net Positive: % Positive (5+6+7) – % Negative (1+2+3)

Q14. In this section, we seek to understand your opinions of Australia and some of its largest trading partners. We will present you with pairs of opposite adjectives (e.g., friendly - unfriendly, safe - unsafe) related to Australia and these trading partners. For each pair, please indicate where your feelings towards Australia and each trading partner fall on a scale between these two opposites.

Comparison by standard breakdown groups.

Net Positive Sentiment Towards **China** – By Key Subgroups (3/3)

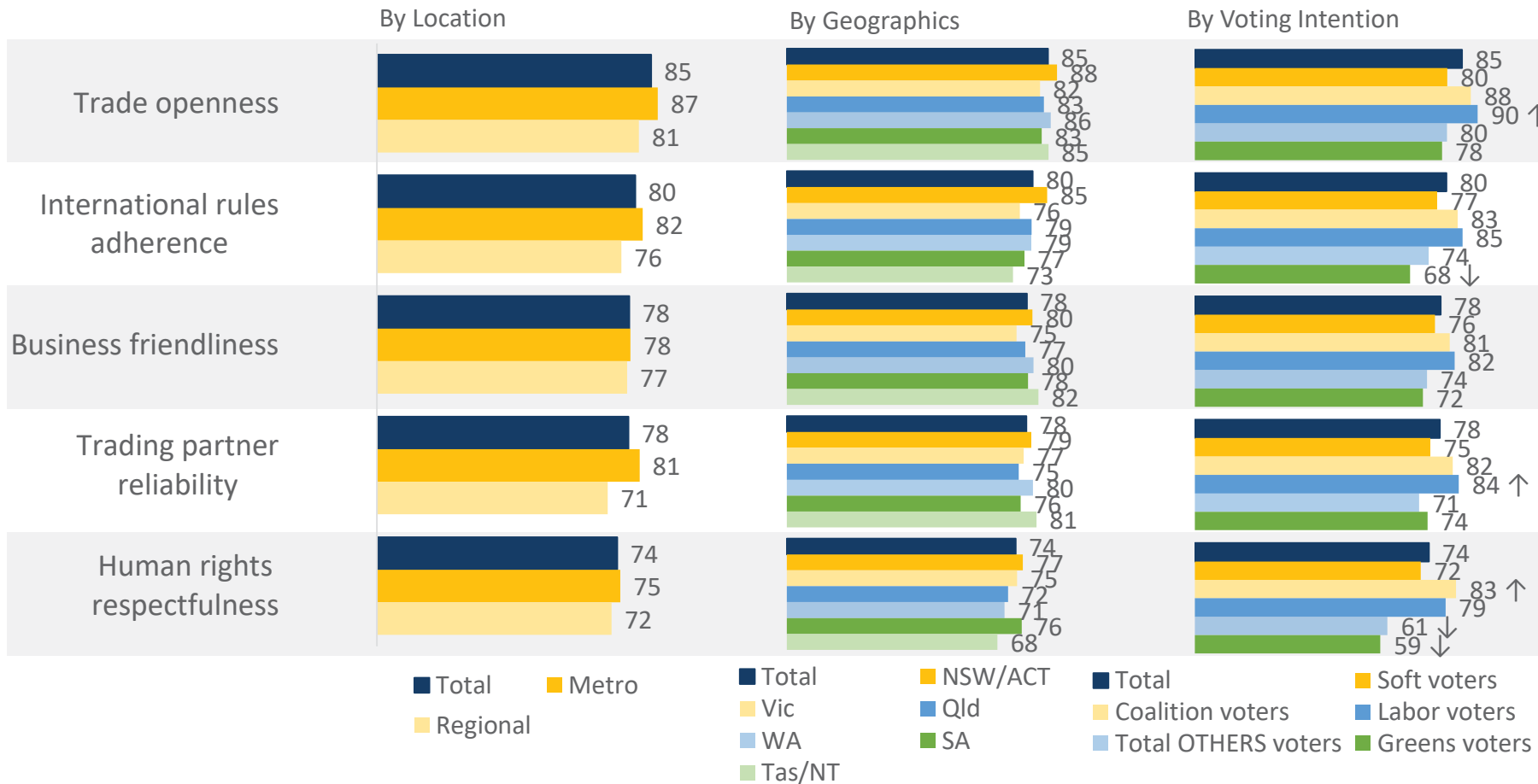


Sorted CHINA Net Positive: % Positive (5+6+7) – % Negative (1+2+3)

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Comparison by standard breakdown groups.

Net Positive Sentiment Towards **Australia** – By Key Subgroups (1/3)

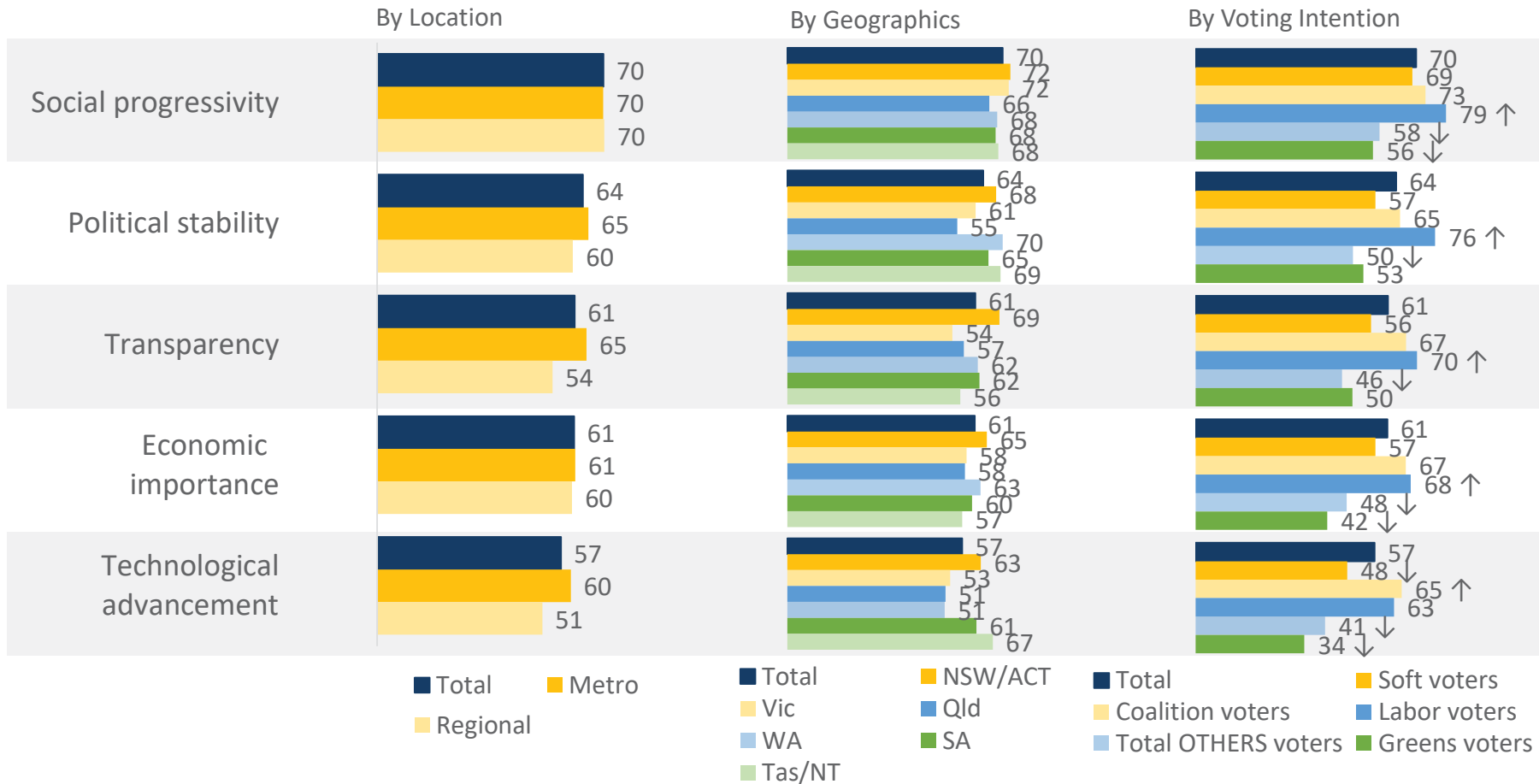


Sorted AU Net Positive: % Positive (5+6+7) – % Negative (1+2+3)

Q14. In this section, we seek to understand your opinions of Australia and some of its largest trading partners. We will present you with pairs of opposite adjectives (e.g., friendly - unfriendly, safe - unsafe) related to Australia and these trading partners. For each pair, please indicate where your feelings towards Australia and each trading partner fall on a scale between these two opposites.

Comparison by standard breakdown groups.

Net Positive Sentiment Towards **Australia** – By Key Subgroups (2/3)

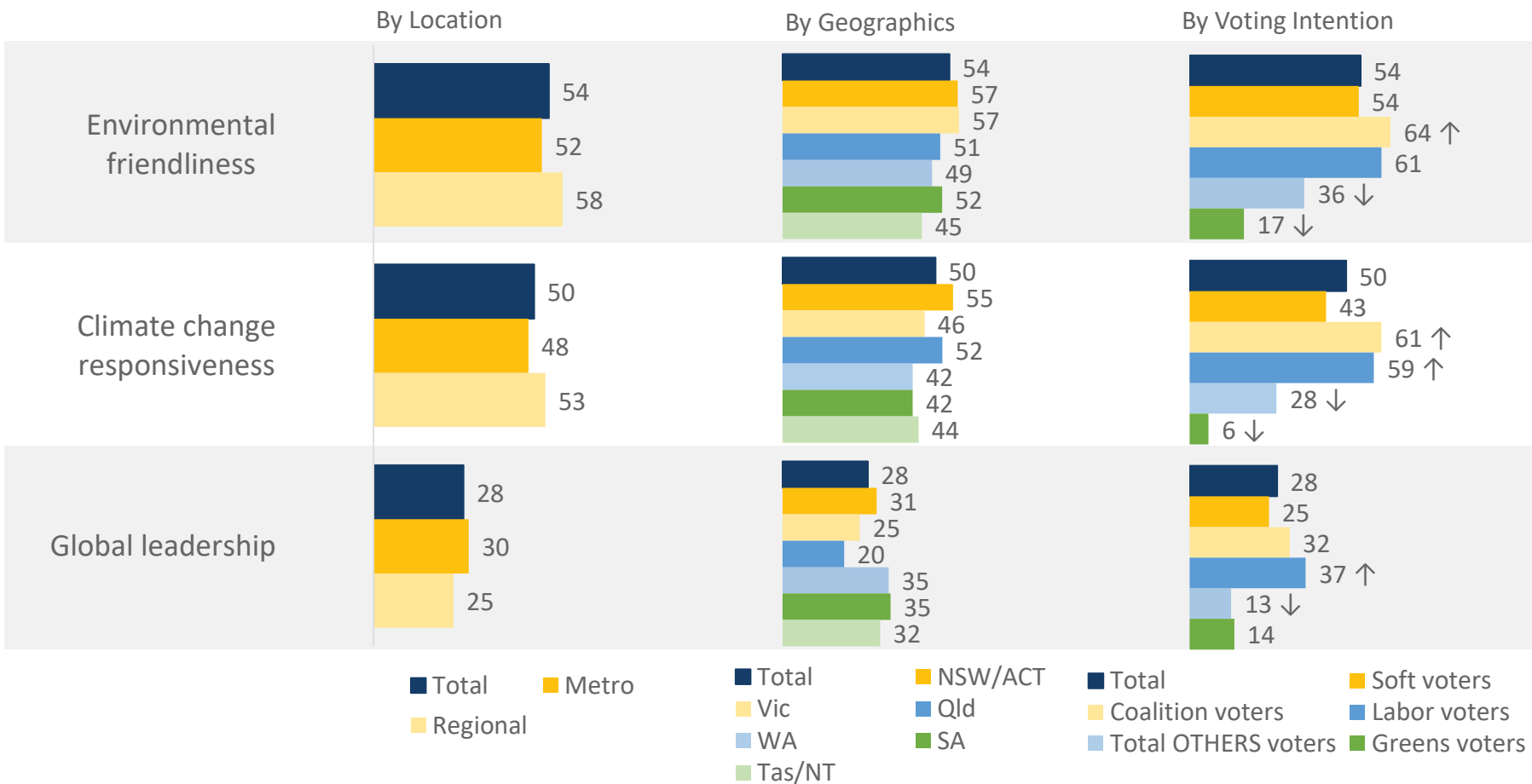


Sorted AU Net Positive: % Positive (5+6+7) – % Negative (1+2+3)

Q14. In this section, we seek to understand your opinions of Australia and some of its largest trading partners. We will present you with pairs of opposite adjectives (e.g., friendly - unfriendly, safe - unsafe) related to Australia and these trading partners. For each pair, please indicate where your feelings towards Australia and each trading partner fall on a scale between these two opposites.

Comparison by standard breakdown groups.

Net Positive Sentiment Towards **Australia** – By Key Subgroups (3/3)



Sorted AU Net Positive: % Positive (5+6+7) – % Negative (1+2+3)

Q14. In this section, we seek to understand your opinions of Australia and some of its largest trading partners. We will present you with pairs of opposite adjectives (e.g., friendly - unfriendly, safe - unsafe) related to Australia and these trading partners. For each pair, please indicate where your feelings towards Australia and each trading partner fall on a scale between these two opposites.

Kaurna acknowledgement

We acknowledge and pay our respects to the Kaurna people, the original custodians of the Adelaide Plains and the land on which the University of Adelaide's campuses at North Terrace, Waite, and Roseworthy are built. We acknowledge the deep feelings of attachment and relationship of the Kaurna people to country and we respect and value their past, present and ongoing connection to the land and cultural beliefs. The University continues to develop respectful and reciprocal relationships with all Indigenous peoples in Australia, and with other Indigenous peoples throughout the world.

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