



# FRESHWATER/QUESTION PRO AUSTRALIA-JAPAN RESEARCH

FEBRUARY 2026



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# AUSTRALIA - JAPAN RESEARCH AGENDA

- ~ Research Approach
- ~ Executive Summary
- ~ Local Priorities
- ~ Attitudes Towards Other Countries
- ~ Favourability & Desirability
- ~ Business Investment & Cultural Differences
- ~ Trade & Investment
- ~ Energy & Resources
- ~ Defence
- ~ Migration & Workers



# RESEARCH APPROACH

- ~ The survey was conducted via online panel and lasted around 15 minutes.
- ~ The sample size was n=2,008 completed interviews with residents of Australia (n= 1,001) and Japan (n= 1,007)
- ~ Fieldwork was undertaken on 8 – 18 December 2025
- ~ Data are weighted to be representative of Australian and Japanese voters
- ~ The margin of error ('MoE') is approximately +/- 3% for topline results in each country, and is larger for subgroups
- ~ All polling represents a snapshot in time, and is not a prediction or guarantee of future outcomes



AUSTRALIA-JAPAN RESEARCH  
Local Priorities

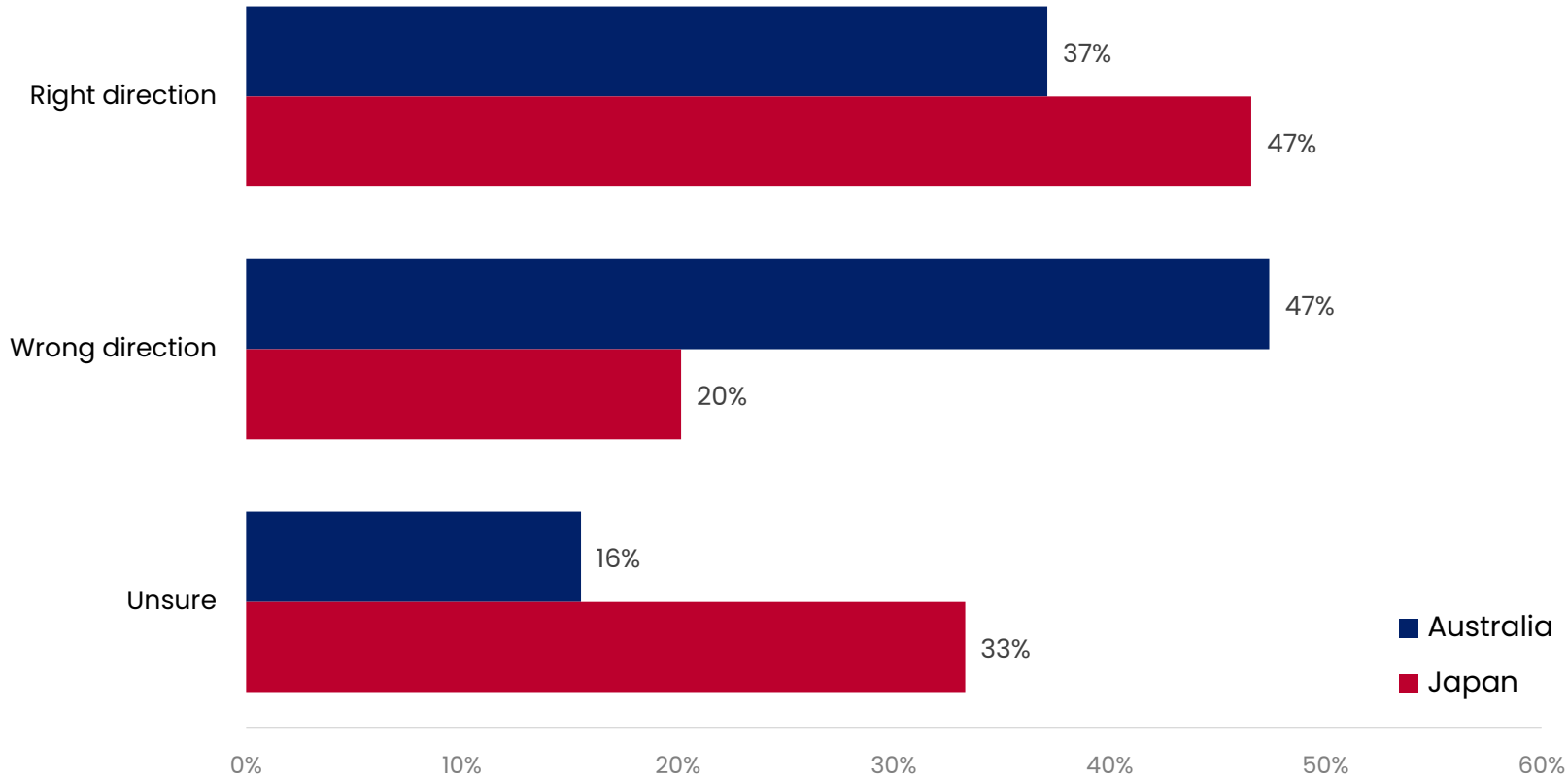
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## NATIONAL DIRECTION

Roughly one half of Australians feel that their country is heading in the wrong direction, whilst Japanese people are more likely to say right direction



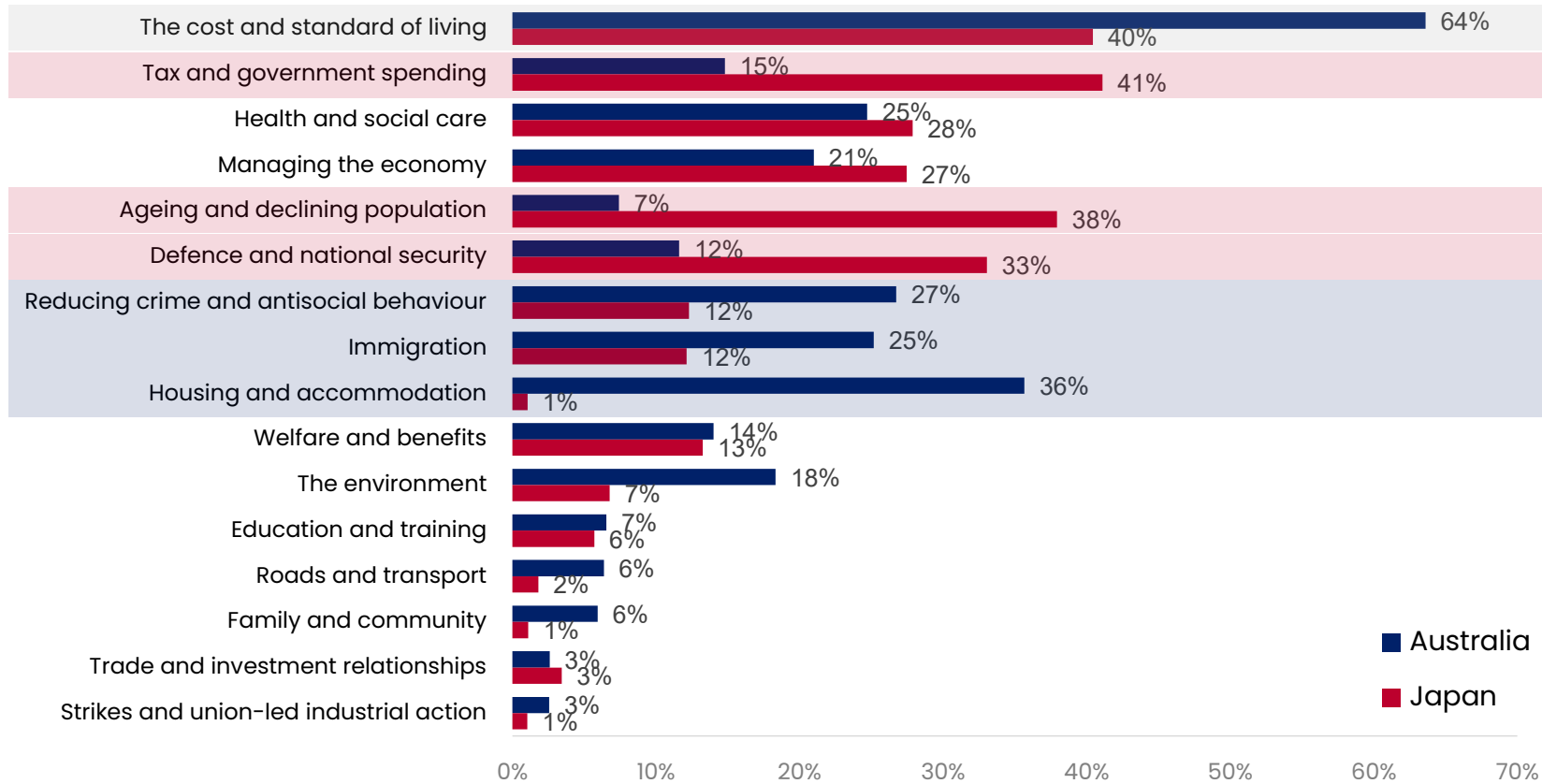
Roughly one half of Australians feel Australia is heading in the wrong direction (47%), compared to about one half of Japanese people who feel Japan is heading in the right direction (47%).

One third (33%) of Japanese people are unsure about the direction of their country.

Q: Do you think that the country is heading in the right direction, or wrong direction at this time?

## ISSUE AGENDA

The cost of living is a key issue for both Australians and Japanese; tax and govt. spending, aging population, and defence also key in Japan



For Australians, the cost & standard of living (64%), followed by housing & accommodation (36%) are the two most important Government priorities.

Immigration (25%) and housing (26%) are comparably greater issues in Australia.

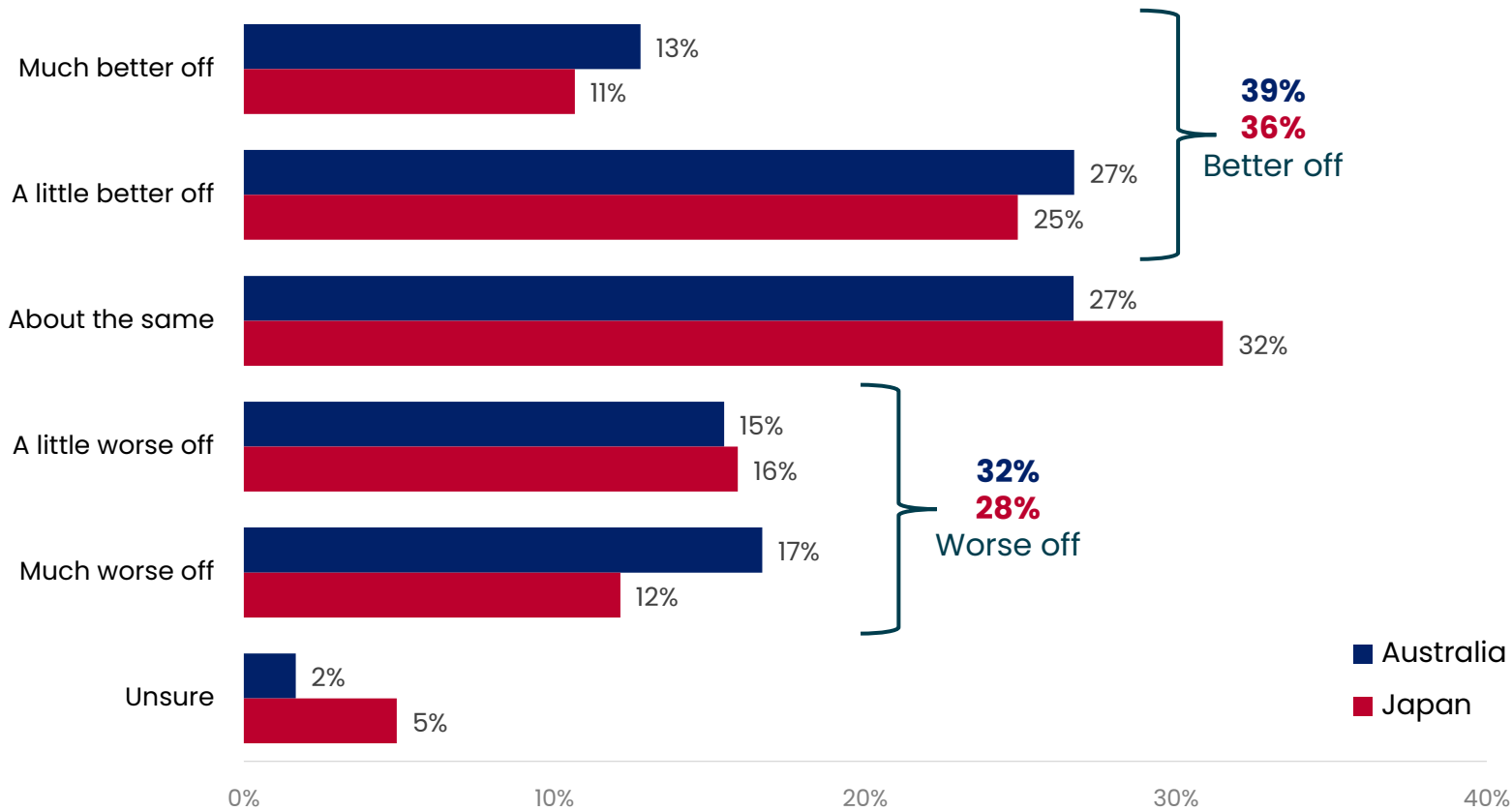
Japanese people are most likely to think that their Government should focus on tax & government spending (41%), the cost & standard of living (40%), and the ageing & declining population (38%).

Defence and national security is a comparably greater issue in Japan at 33%, whilst Housing (1%) is not a key issue.

Q: In your view, which of the following are the most important issues for the Government to prioritise at this time? Please pick up to 3

## FINACIALLY BETTER OFF THAN YOUR PARENTS

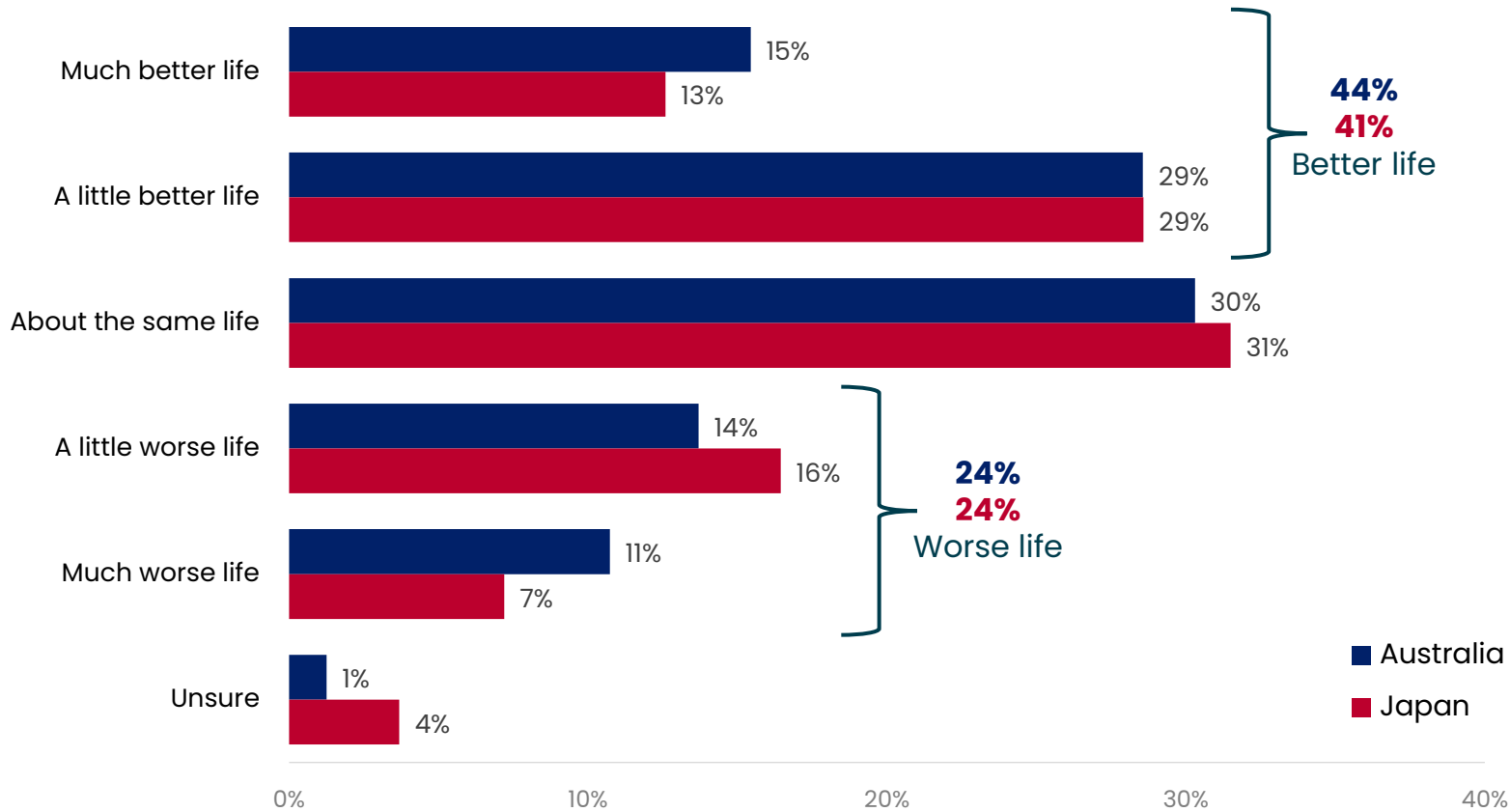
Both nations are largely divided as to whether they will either be financially better off or about the same as their parents



Q: Over the course of your lifetime, do you believe that you will be / are financially better off, or worse off than your parents were? (squeeze)

## QUALITY OF LIFE

Both Australians and Japanese people are more likely to think that their quality of life overall is better than that of their parents



Q: ...and now thinking about the quality of your life more broadly, is your life better or worse than that of your parents? (squeeze)



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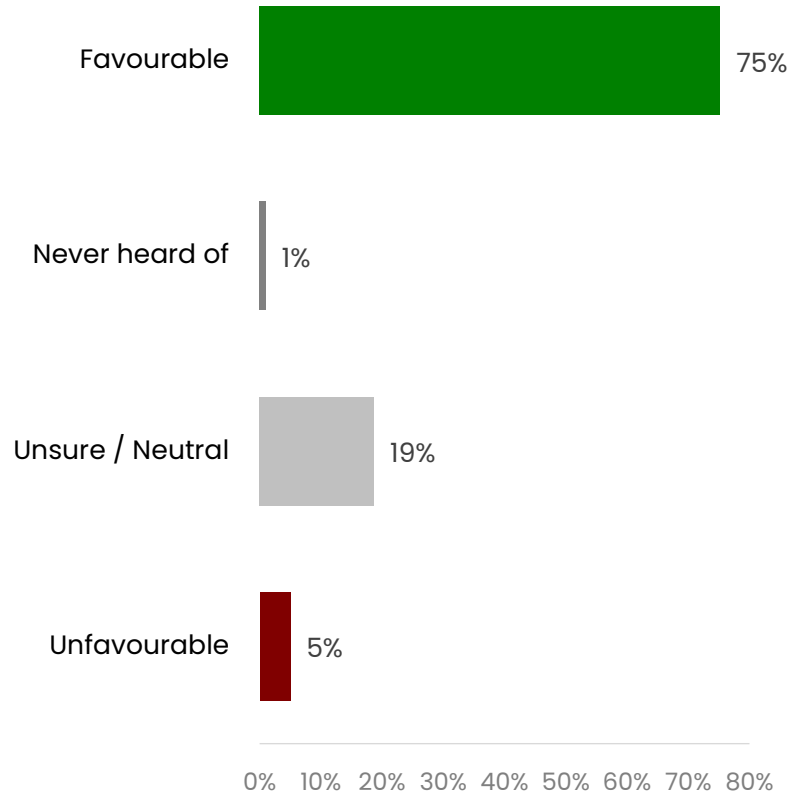
# Attitudes Towards Other Countries



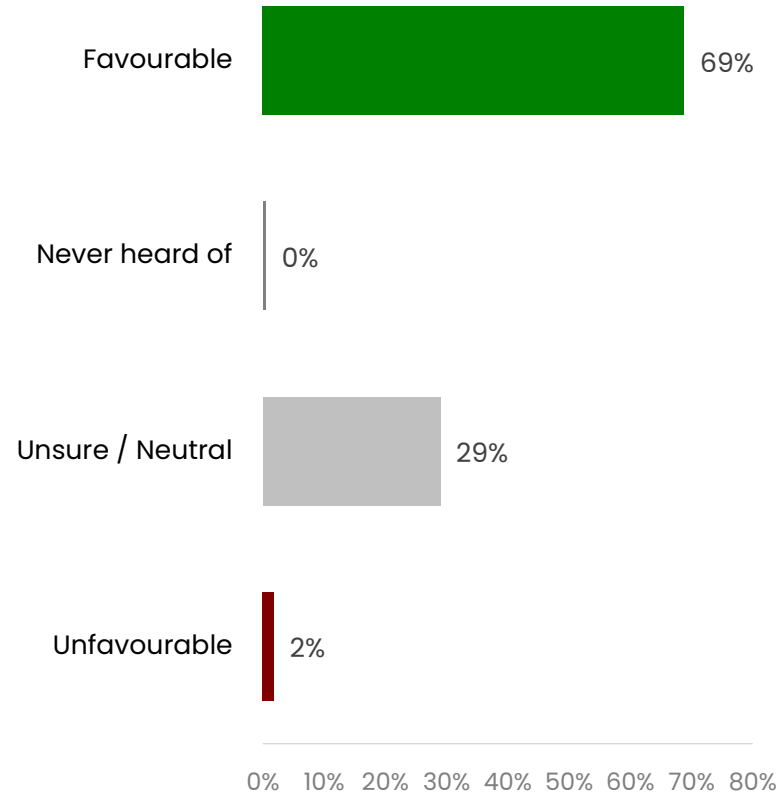
## FAVOURABILITY

A clear majority of both Australians and Japanese people are favourable towards each other's countries

### Japan Favourability Among Australians



### Australia Favourability Among Japanese

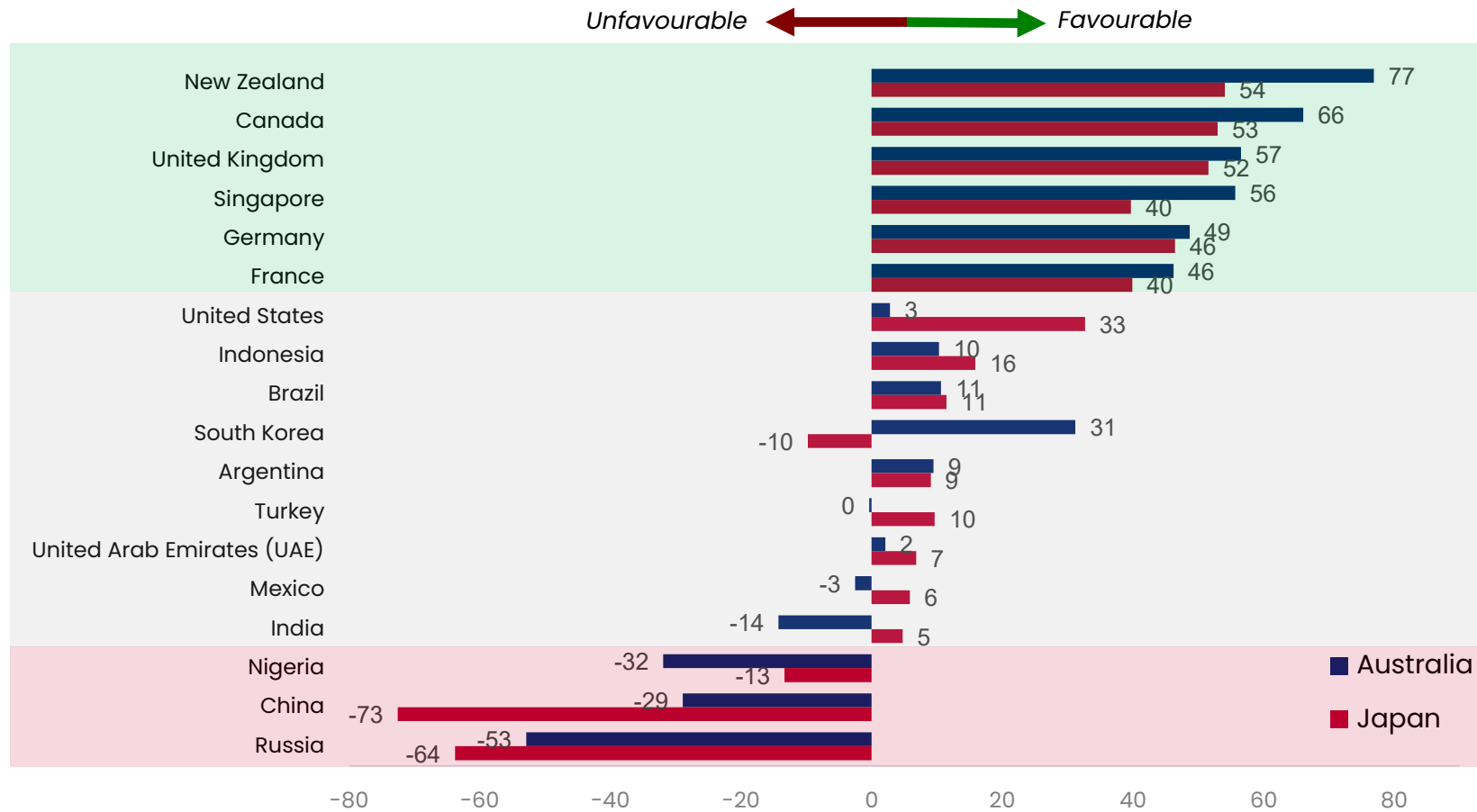


Australians and Japanese people are similarly favourable of each others' countries (69% & 75%).

Q: Below are a number of countries. For each, can you say whether you have a favourable, or unfavourable view of them

# FAVOURABILITY OF OTHER COUNTRIES

## Views among Australians and Japanese people are most divergent towards the United States, South Korea, and India



Both Australians and Japanese people have a favourable view of New Zealand (NET +77 & +54), Canada (+66 & +53), and the United Kingdom (+57 & +52).

Japanese people are much more favourable towards the United States (+33) when compared to Australians (+3).

Both Australians and Japanese people are unfavourable of Nigeria (-32 & -13), China (-29 & -73), and Russia (-53 & -64).

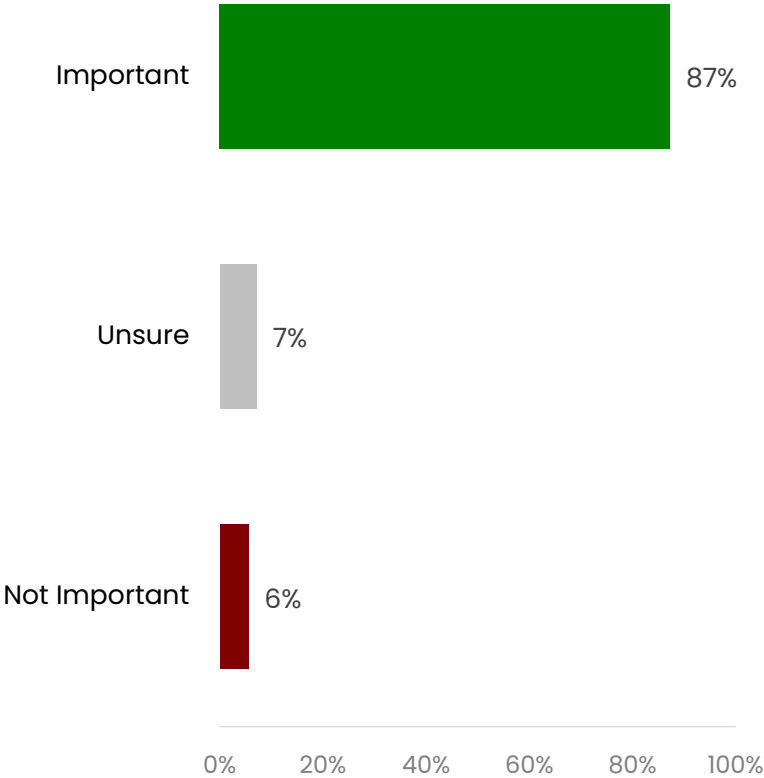
Japanese people are unfavourable toward South Korea (-10), compared to Australians (+31)

Q: Below are a number of countries. For each, can you say whether you have a favourable, or unfavourable view of them

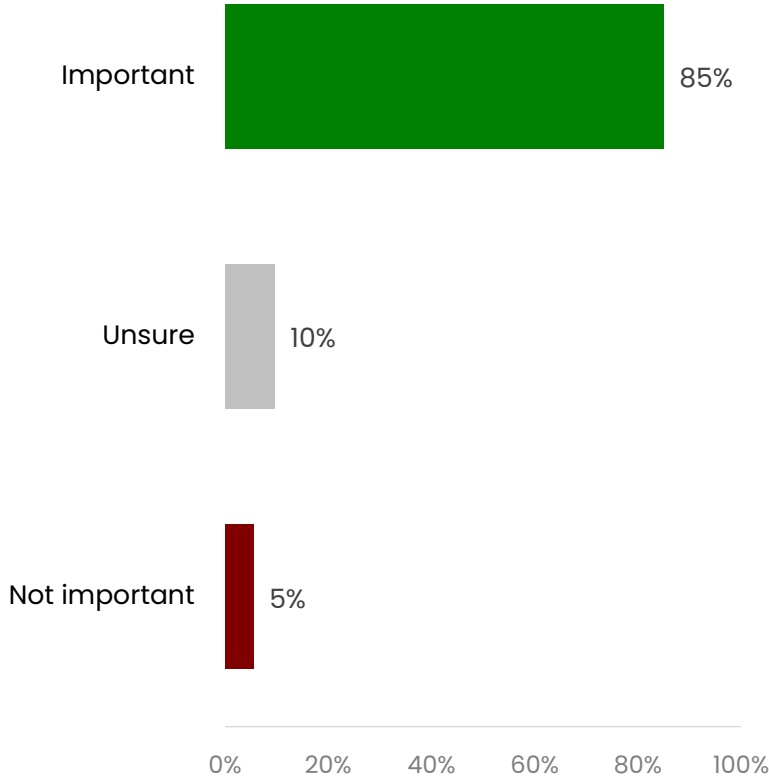
# IMPORTANCE OF TRADE WITH OTHER COUNTRIES

## Australians and Japanese people clearly identify the importance of trade between both countries

Japan Favourability Among Australians



Australia Favourability Among Japanese

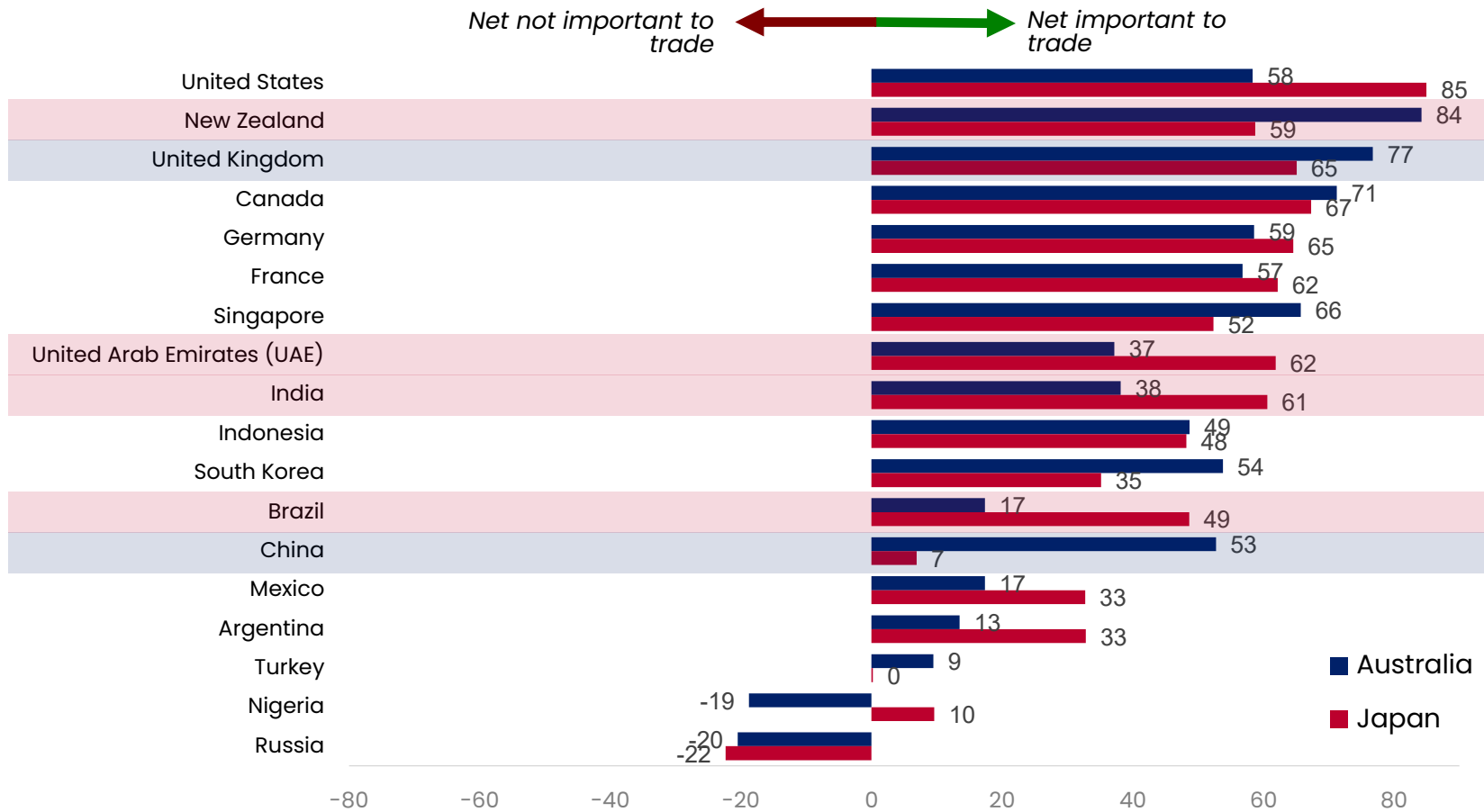


Australians and Japanese people both identify the other nation as important for trade (87% & 85%).

Q: In your view, how important is it, if at all, that Japan continues to trade with the following countries

Q: In your view, how important is it, if at all, that Australia continues to trade with the following countries

IMPORTANCE OF TRADE WITH OTHER COUNTRIES COMPARISON (NET)  
 Japanese people value trade with the US, UAE, and India comparably more; Australians value trade with New Zealand and China



Japanese people value trade with the United States more than Australians (NET +85 vs +58).

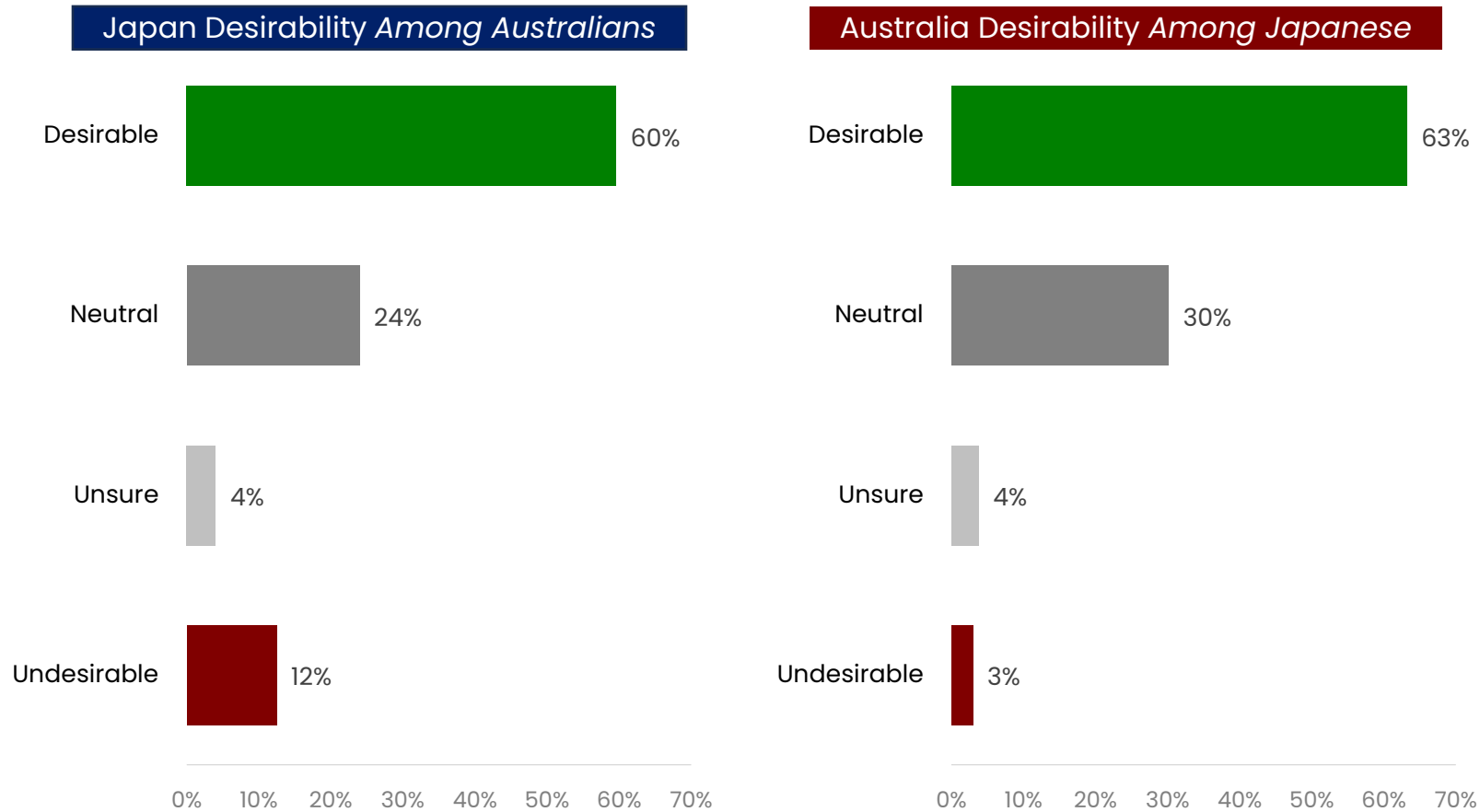
Australians value trade with New Zealand (+84 vs +59) and China (+53 vs +7) more.

Q: In your view, how important is it, if at all, that Japan continues to trade with the following countries

Q: In your view, how important is it, if at all, that Australia continues to trade with the following countries

## DESIRABILITY TO LIVE AND WORK

A clear majority of both Australians and Japanese people view the corresponding country as a desirable place to live and work

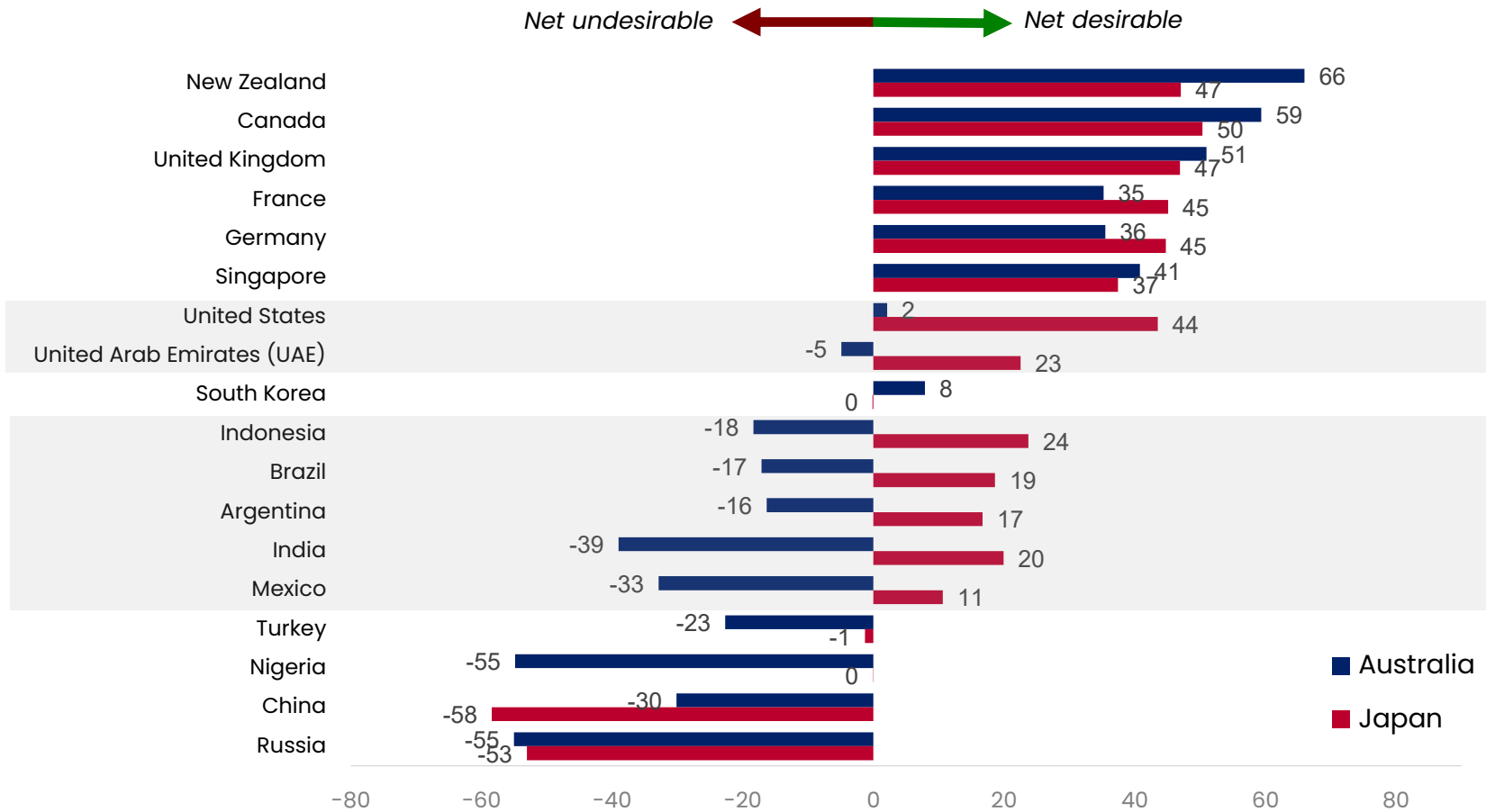


Australians and Japanese people view the corresponding country as a desirable place to live and work (63% & 60%, respectively).

Q: Below are a number of countries. For each, can you rate how desirable or undesirable it would be to live and work there

# DESIRABILITY TO LIVE AND WORK IN OTHER COUNTRIES (NET)

Both Australians and Japanese people view NZ, Canada, and the UK as the most desirable places to live and work; divergent views regarding US

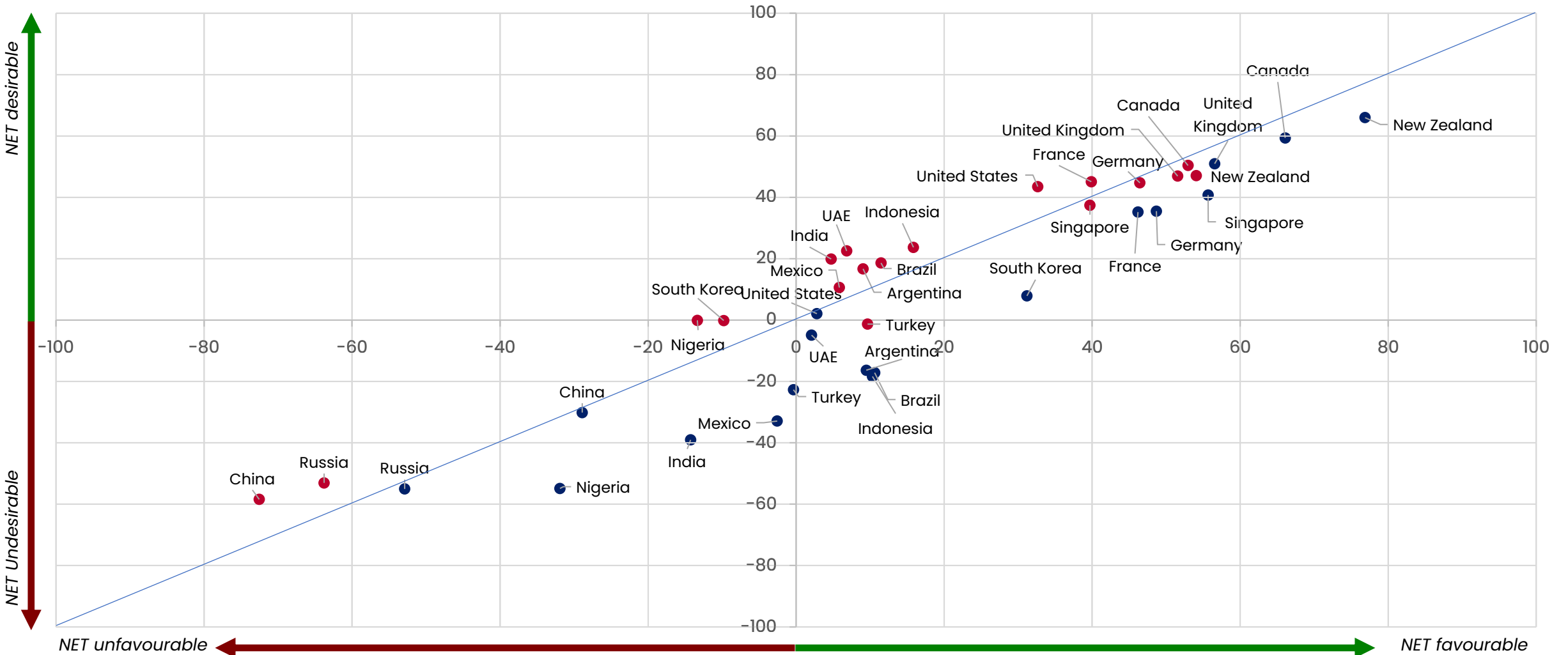


Both Australians and Japanese people view New Zealand (NET +66 & +47), Canada (+59 & +50), and the United Kingdom (+51 & +47) as the most desirable places to live and work.

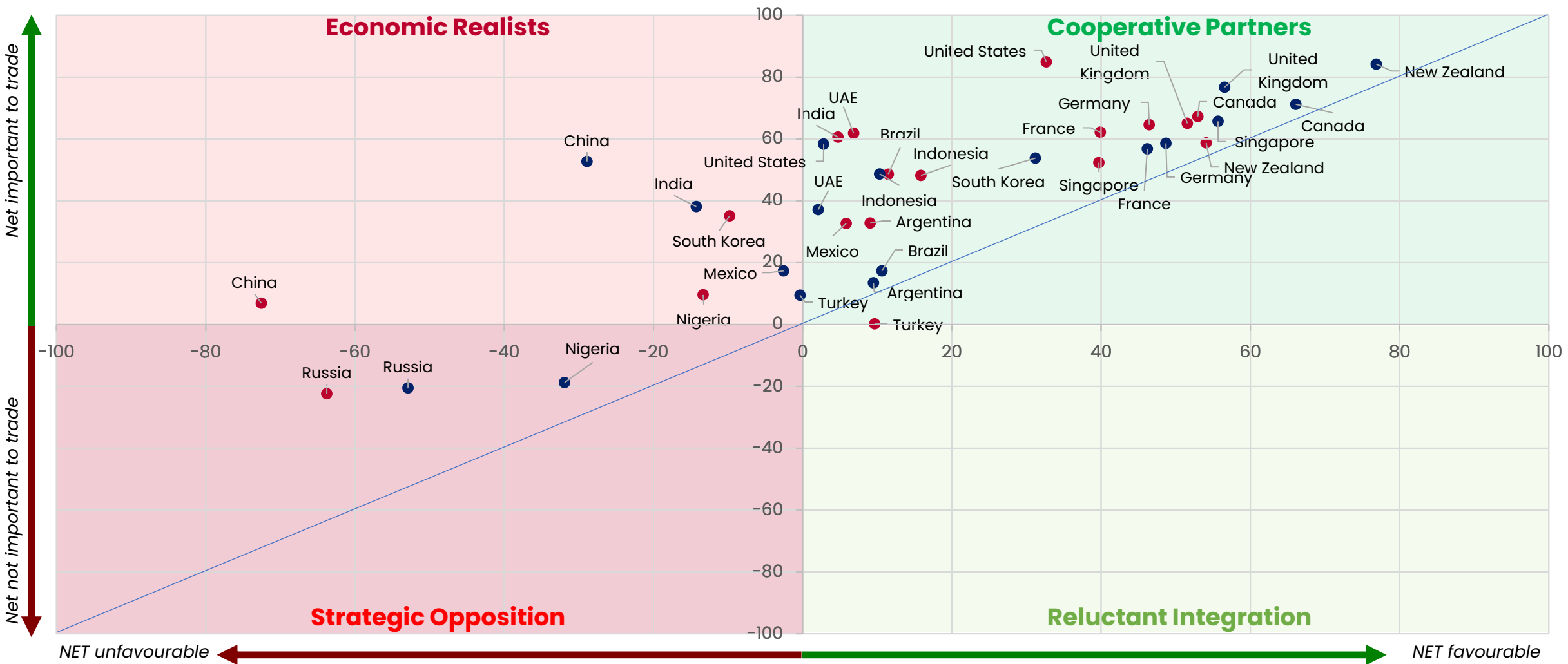
Australians and Japanese people are at odds on the desirability of the following countries: Indonesia (-18 vs +24), Brazil (-17 vs +19), Argentina (-16 vs +17), India (-39 vs +20), and Mexico (-33 vs +11).

Q: Below are a number of countries. For each, can you rate how desirable or undesirable it would be to live and work there

NET FAVOURABILITY BY NET DESIRABILITY TO LIVE AND WORK  
 There is a strong relationship between desirability to live and work in a nation and overall favourability



NET FAVOURABILITY BY SUPPORT FOR TRADE WITH OTHER COUNTRIES  
 Australians are Economic Realists on China, India and Mexico, while the Japanese people are similar about China, Nigeria and South Korea





AUSTRALIA-JAPAN RESEARCH

# Business Investment & Cultural Differences

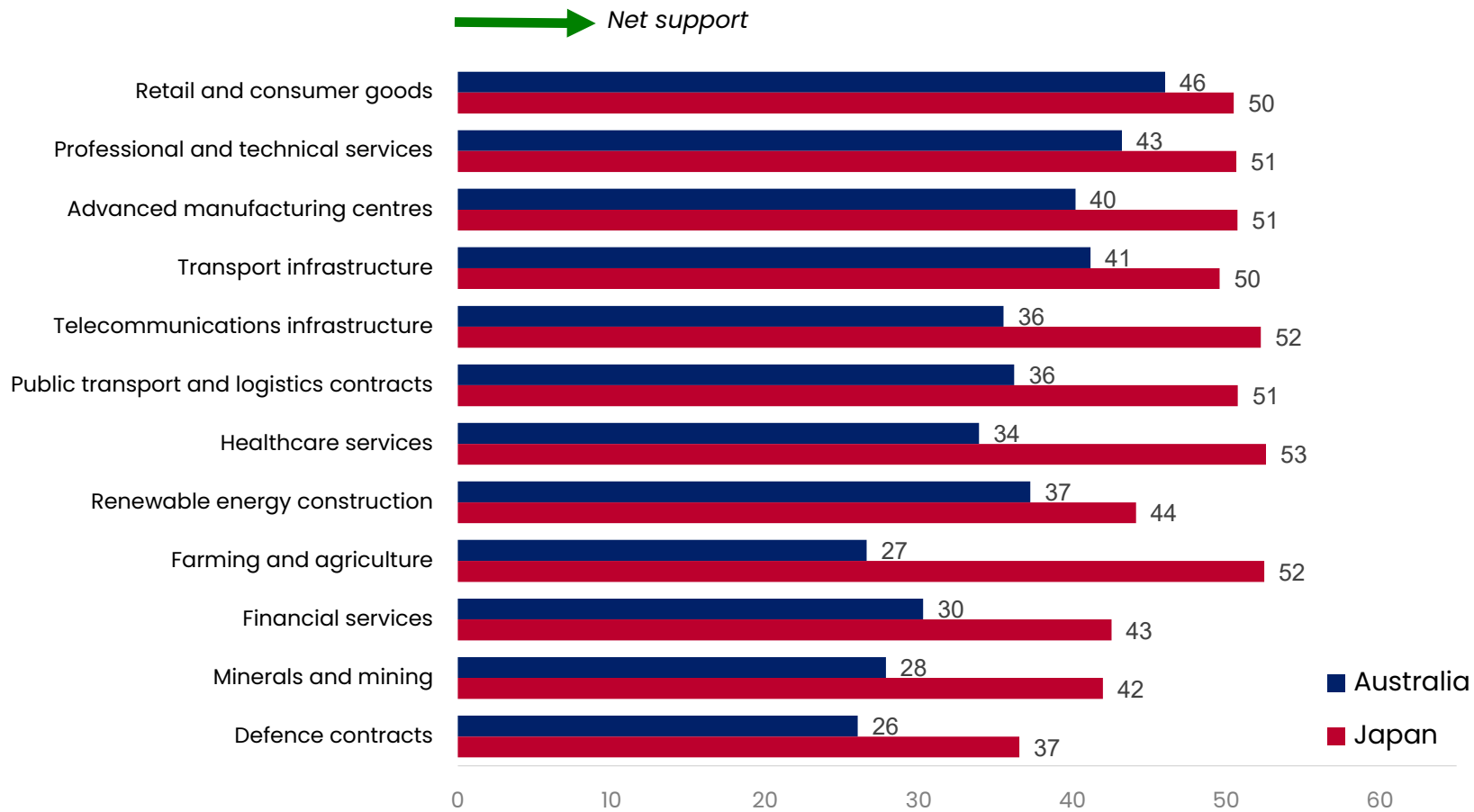
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## COUNTRY INVESTMENT (NET)

Both Australians and Japanese people are broadly supportive of companies from each nation investing across all prompted sectors



Japanese people are largely more supportive of Australian companies investing across prompted sectors, in particular healthcare services (NET +53) and telecommunication infrastructure (+52).

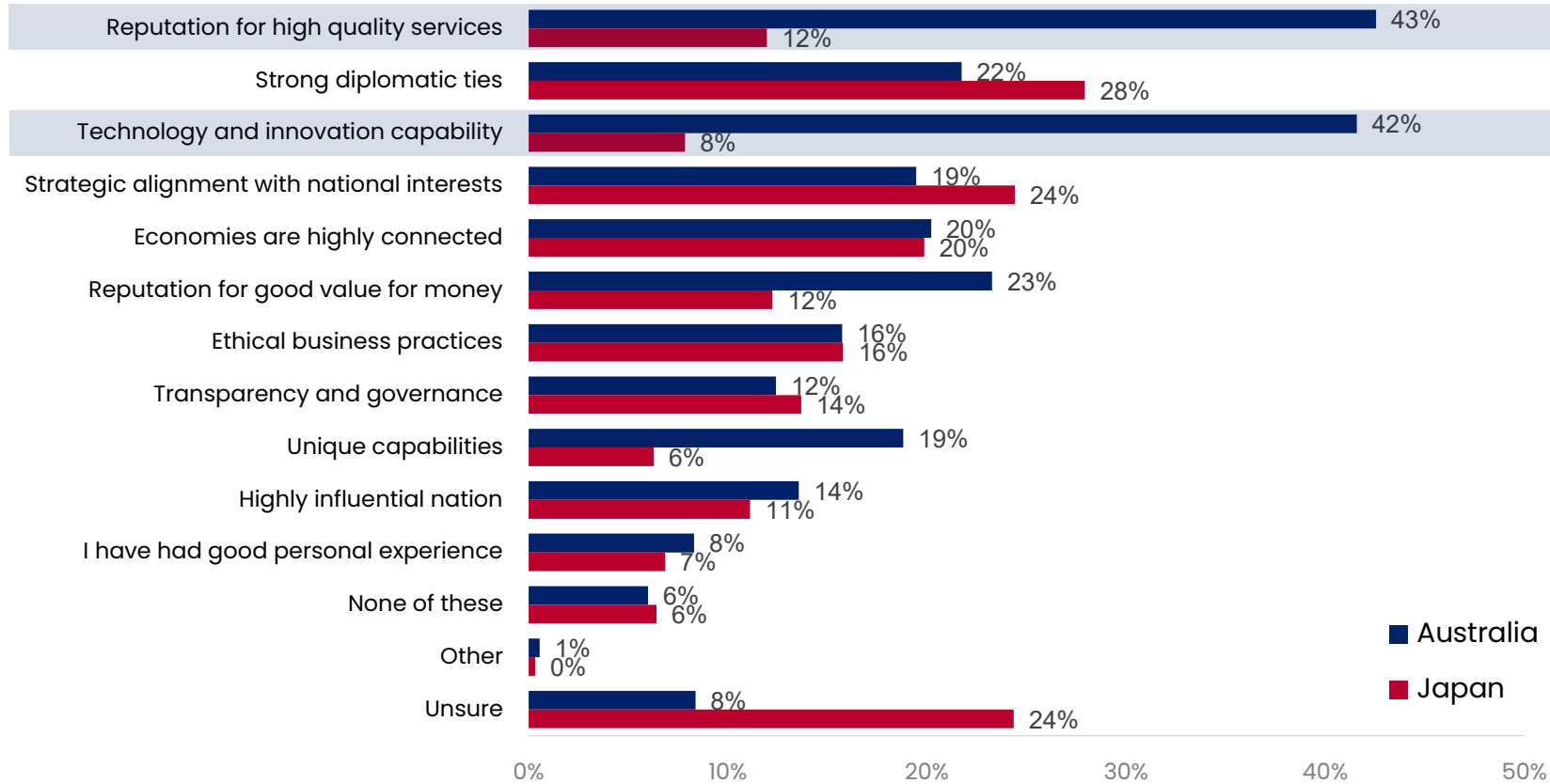
Australians are relatively less supportive of Japanese investment in defence and agriculture, when compared to views among Japanese people towards Australia.

Q: In your opinion, to what extent would you support or oppose Australian companies and investors, investing in the following sectors in Japan

Q: In your opinion, to what extent would you support or oppose Japanese companies and investors, investing in the following sectors in Australia

## MAIN REASONS FOR ALLOWING INVESTMENT

Both countries agree the main reason for investment is a strategic alignment with national interests and the economies being highly connected



Australian's main reason for supporting Japanese investment revolve around Japan's capabilities. Their reputation for high quality services (43%) and their technology & innovation capabilities (42%).

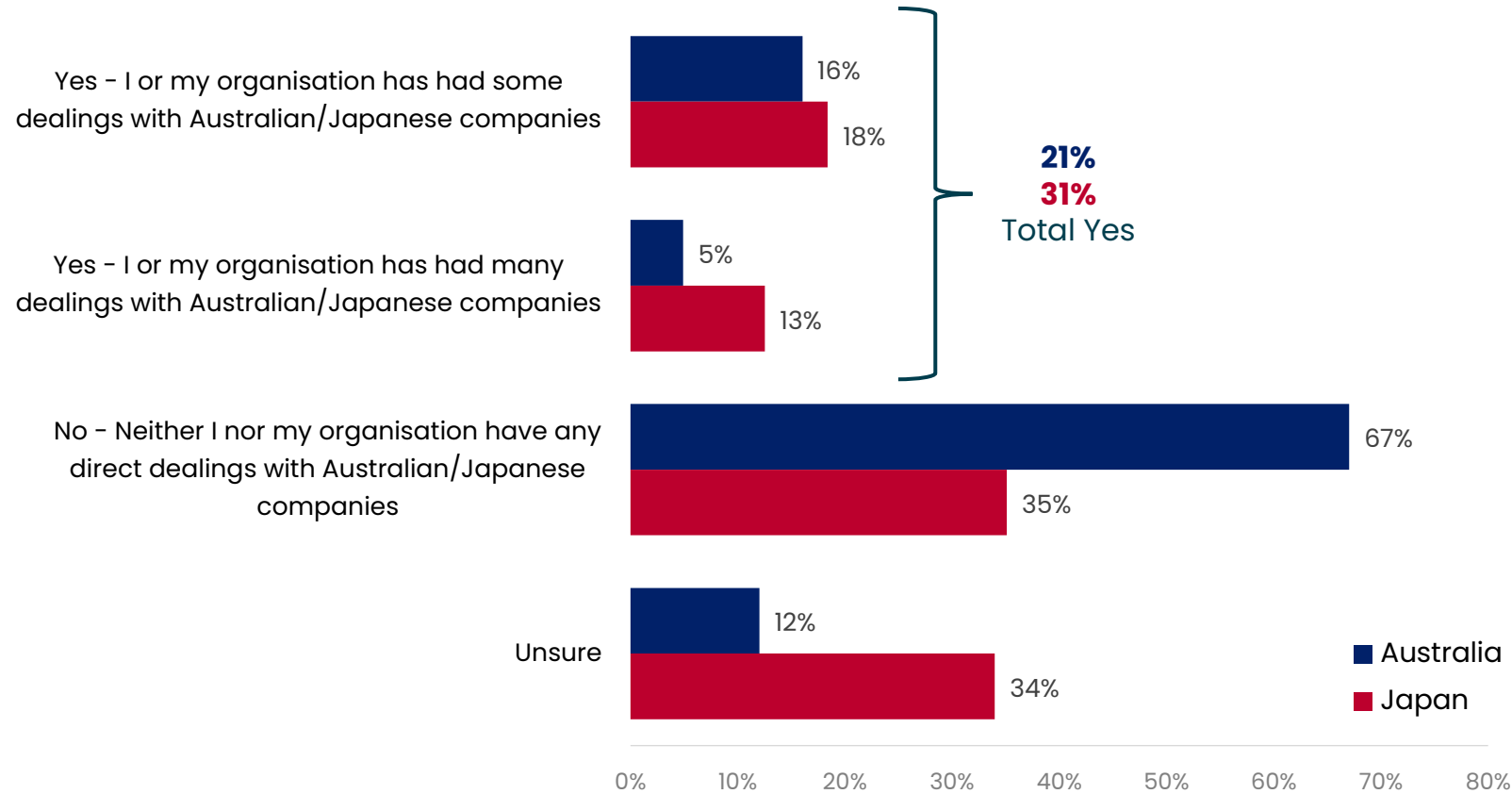
Japanese people take a much more practical view citing the strong diplomatic ties (28%) and the strategic alignment with national interests (24%).

Q: What would be the main reasons FOR allowing more investment from Japan/Australia?  
Please pick up to 3

## DIRECT BUSINESS OR INVESTMENT DEALINGS

A majority of those employed in both Australia and Japan have either had no dealing with foreign companies or are unsure

### EMPLOYED ONLY



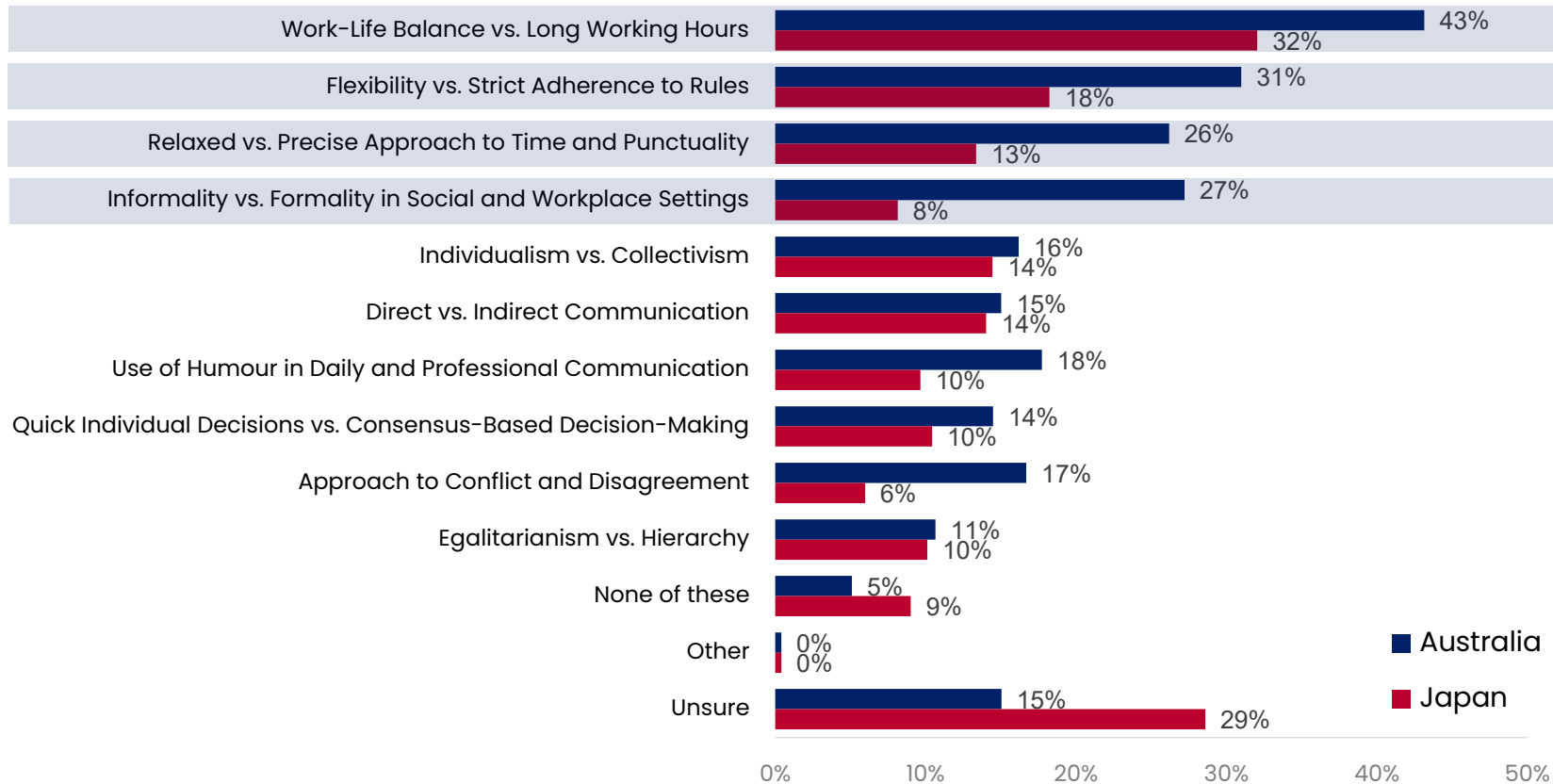
A large majority of those employed in both Australia (73%) have not had direct dealings with Japanese companies.

Almost half of those employed in Japan (40%) are unsure if they have had any dealing with Australian companies.

Q: Have you, or the organisation you work for, had any direct business or investment dealings with Australian/Japanese companies?

## CULTURAL DIFFERENCES

Working hours are seen by both Australians and Japanese people as the largest cultural difference between the two nations



Work-Life Balance vs. Long Working Hours are seen by both Australians and Japanese people as the largest cultural difference between the two nations (43% vs 32%, respectively).

For Australians this is followed by Flexibility vs. Strict Adherence to Rules (31%) and Informality vs. Formality in Social and Workplace Settings (27%).

Roughly one third of Japanese people (29%) are unsure of the largest cultural differences.

Q: Which of the following qualities represent the largest cultural differences between Australians and the Japanese? Please pick up to 3



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# Trade & Investment

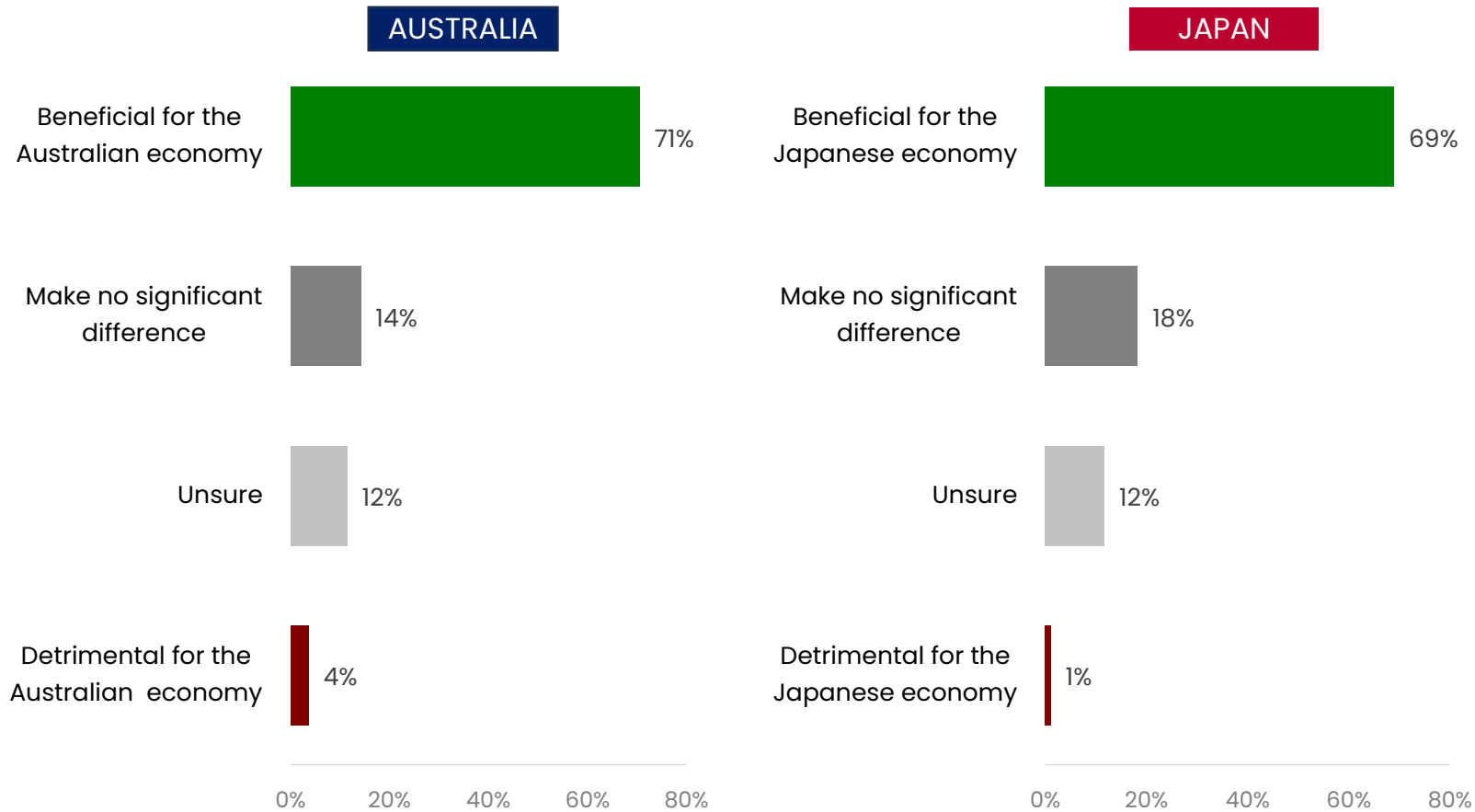
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## IMPACT ON THE DOMESTIC ECONOMY

A large majority of both Australians and Japanese people believe increased trade between Australia and Japan would be beneficial for both economies



About three in four Australians (71%) view increased trade with Japan as beneficial for the Australian economy.

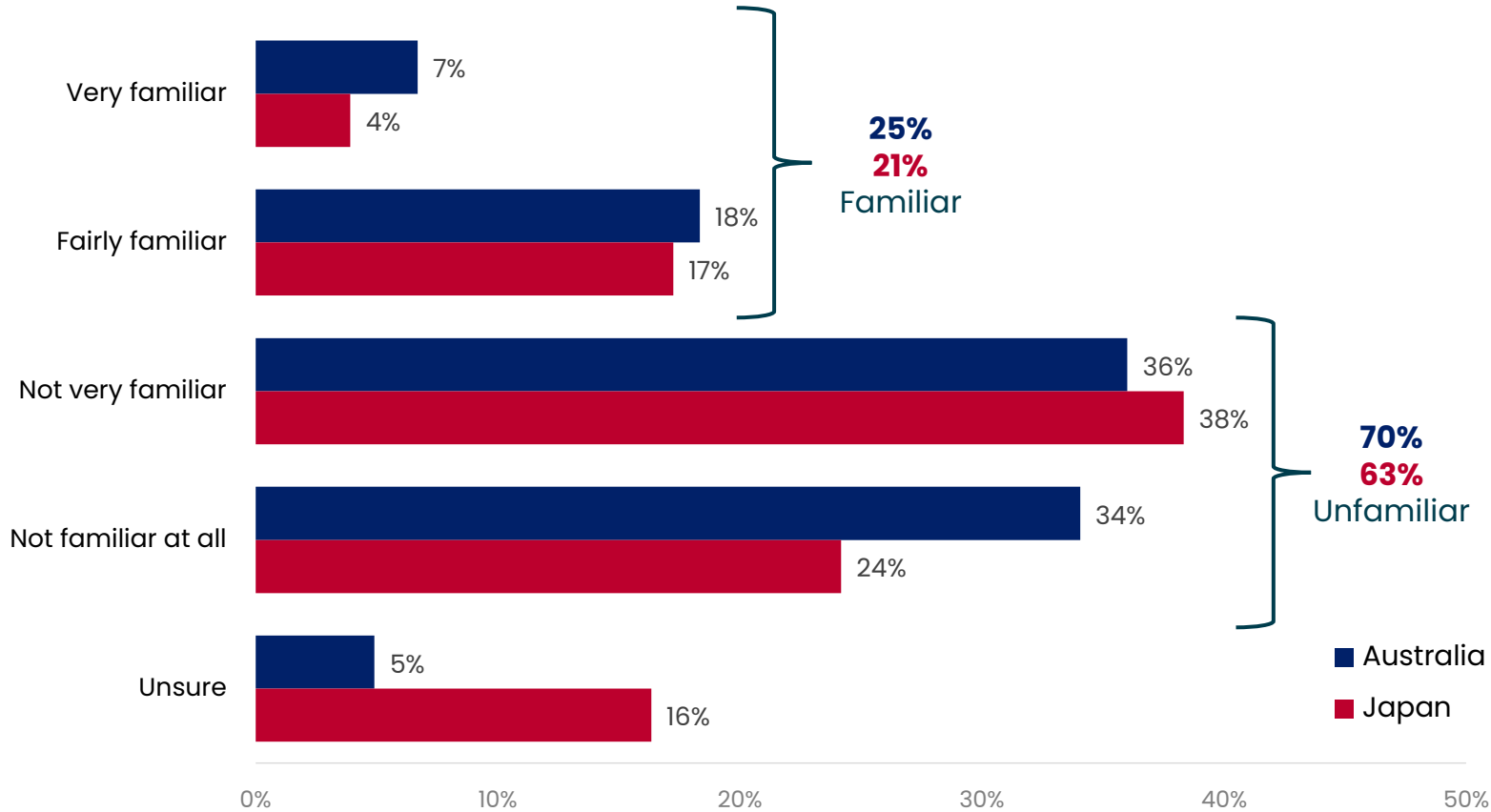
Similarly, about three in four Japanese people (69%) view increased trade with Australia as beneficial for the Japanese economy.

Q: In your view, how much of an impact, if at all, would increased trade with Australia have on the domestic economy of Japan?

Q: In your view, how much of an impact, if at all, would increased trade with Japan have on the domestic economy of Australia?

# FAMILIARITY WITH TRADE BETWEEN AUSTRALIA AND JAPAN

Though, a large majority of people from both countries are unfamiliar with the trade and investment relationship between Australia and Japan



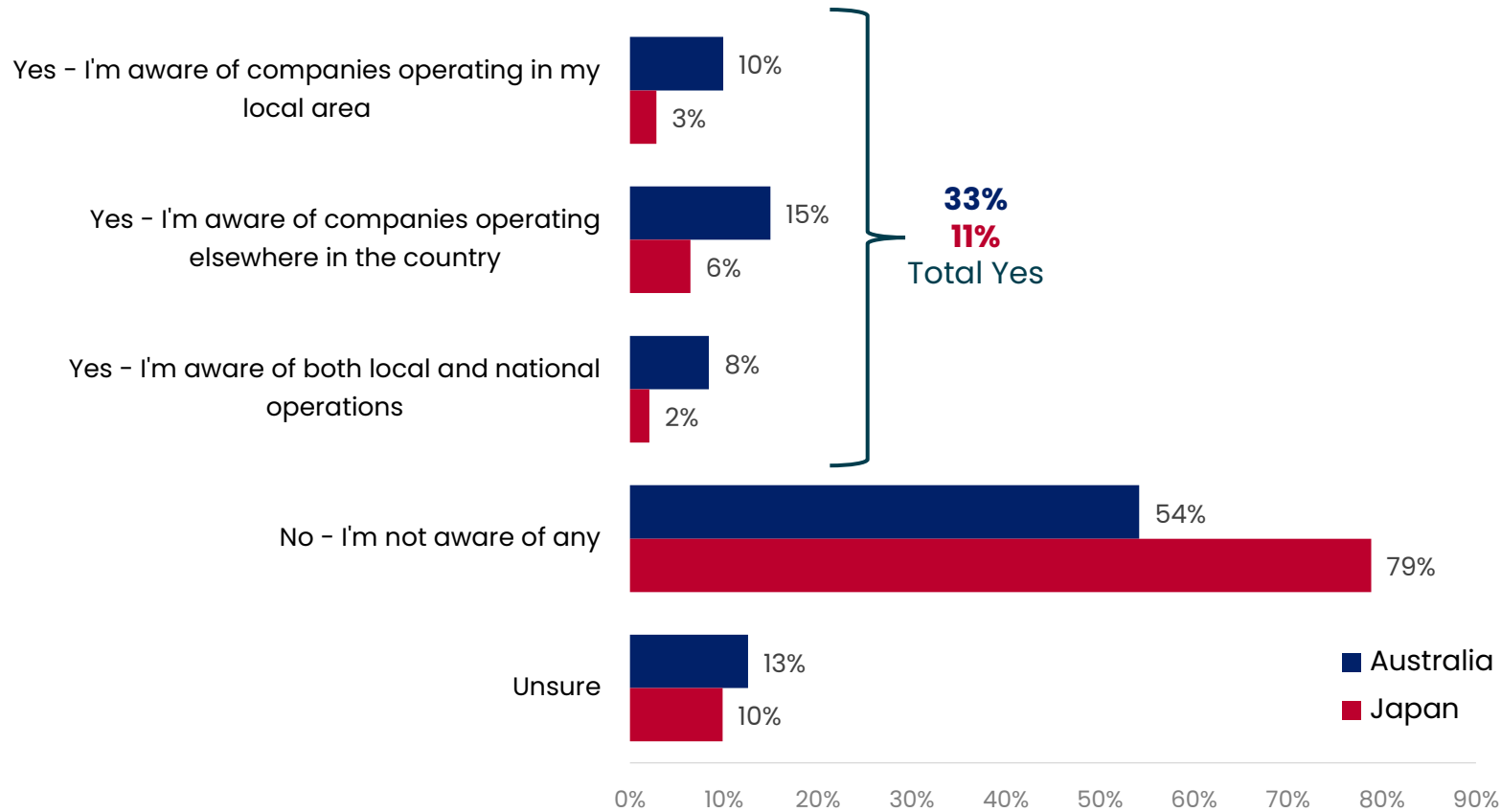
A large majority of people from both countries are unfamiliar with the trade and investment relationship between Australia and Japan (70% and 63%, respectively).

One third of Australians (34%) and one quarter of Japanese people (24%) are *not familiar at all*.

Q: To what extent are you familiar, if at all, with the trade and investment relationship between Australia and Japan?

## AWARENESS OF AUSTRALIAN/JAPANESE COMPANIES

A majority for both Australians and Japanese people are not aware of Australian or Japanese companies operating in their local area or nationally

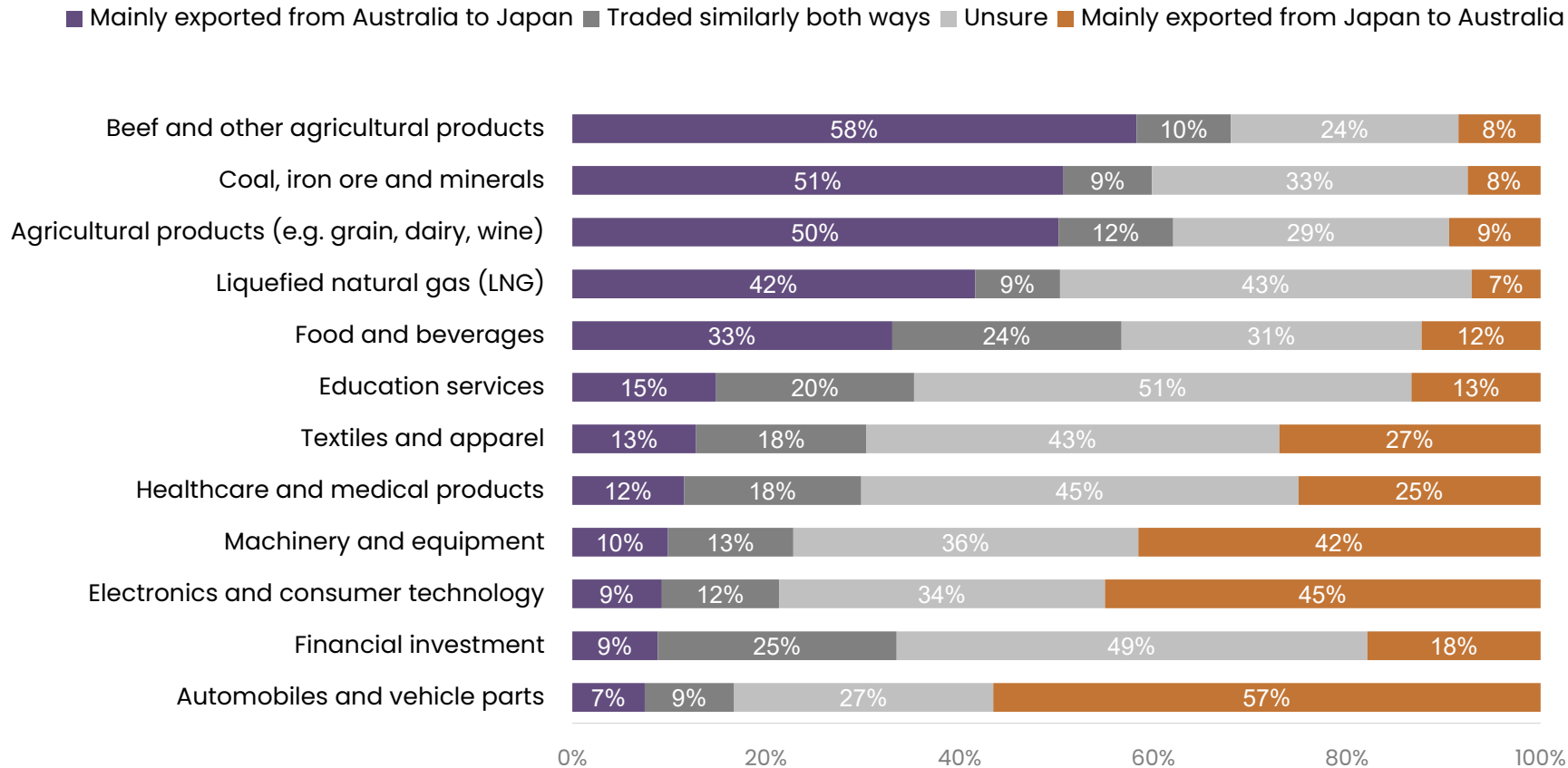


Just over half of Australians (54%) and over three quarters of Japanese people (79%) are not familiar with any Australian or Japanese companies operating in their local area or nationally.

Q: Are you aware of Australian/Japanese companies operating either in your local area or nationally?

## TRADE BETWEEN AUSTRALIA AND JAPAN

Australia is known to the Japanese for its beef and critical minerals exports, while Japan is known to Australians for their automobiles



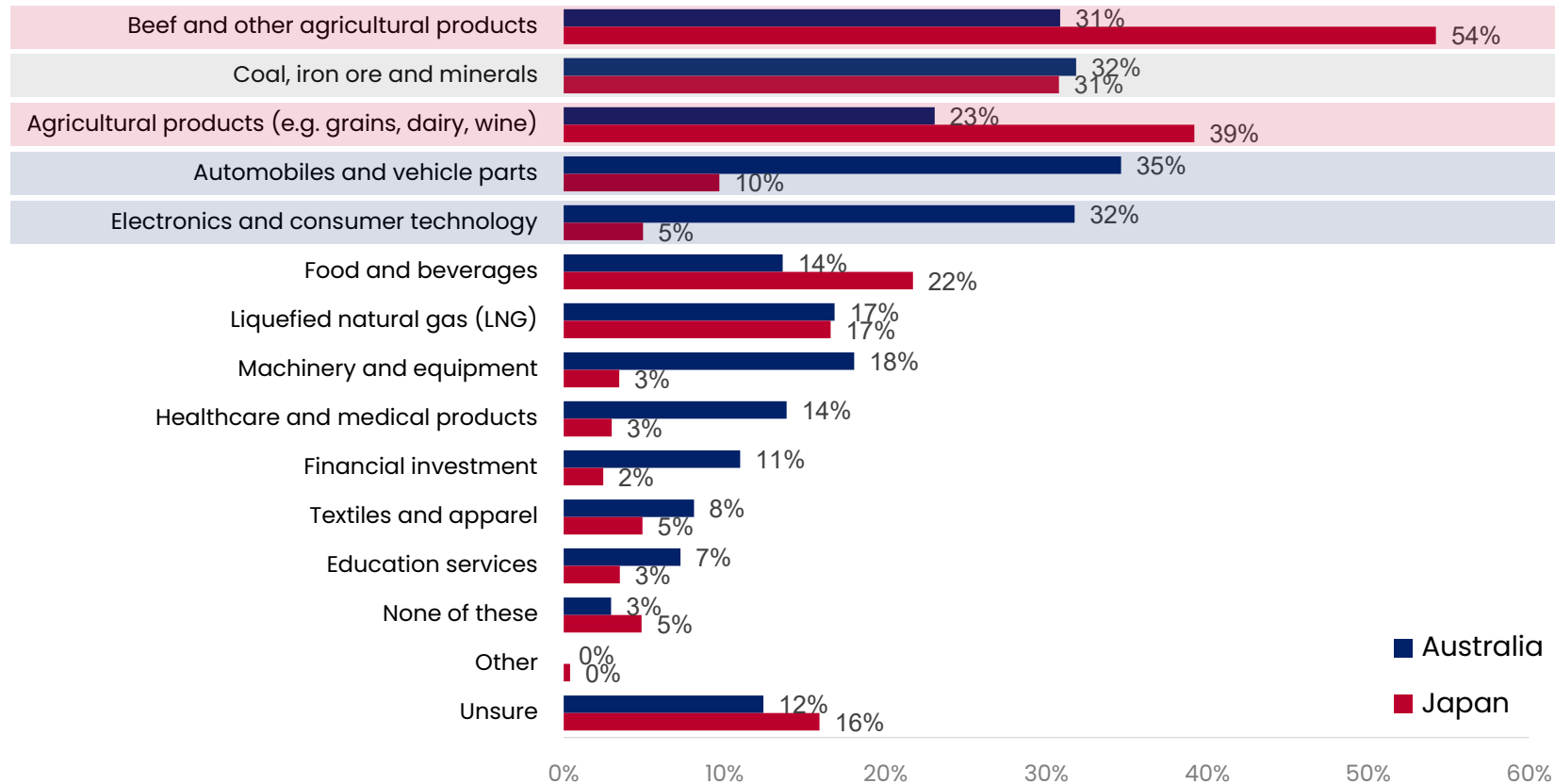
People expect Australia to export beef & other agricultural products, coal, iron ore & minerals, agricultural products including grain, dairy & wine, and liquefied natural gas.

Japan is perceived as exporting automobiles, electronics, and machinery & equipment.

Q: Thinking about trade between Australia and Japan. For each of the following products, please tell us whether you think it is mainly exported from Australia to Japan, imported into Australia from Japan, traded both ways, or if you are not sure

## IMPORTANT TRADE PRODUCTS

Beef and other agricultural products, including grains, dairy, and wine are considered the two most important products for trade for Japanese people



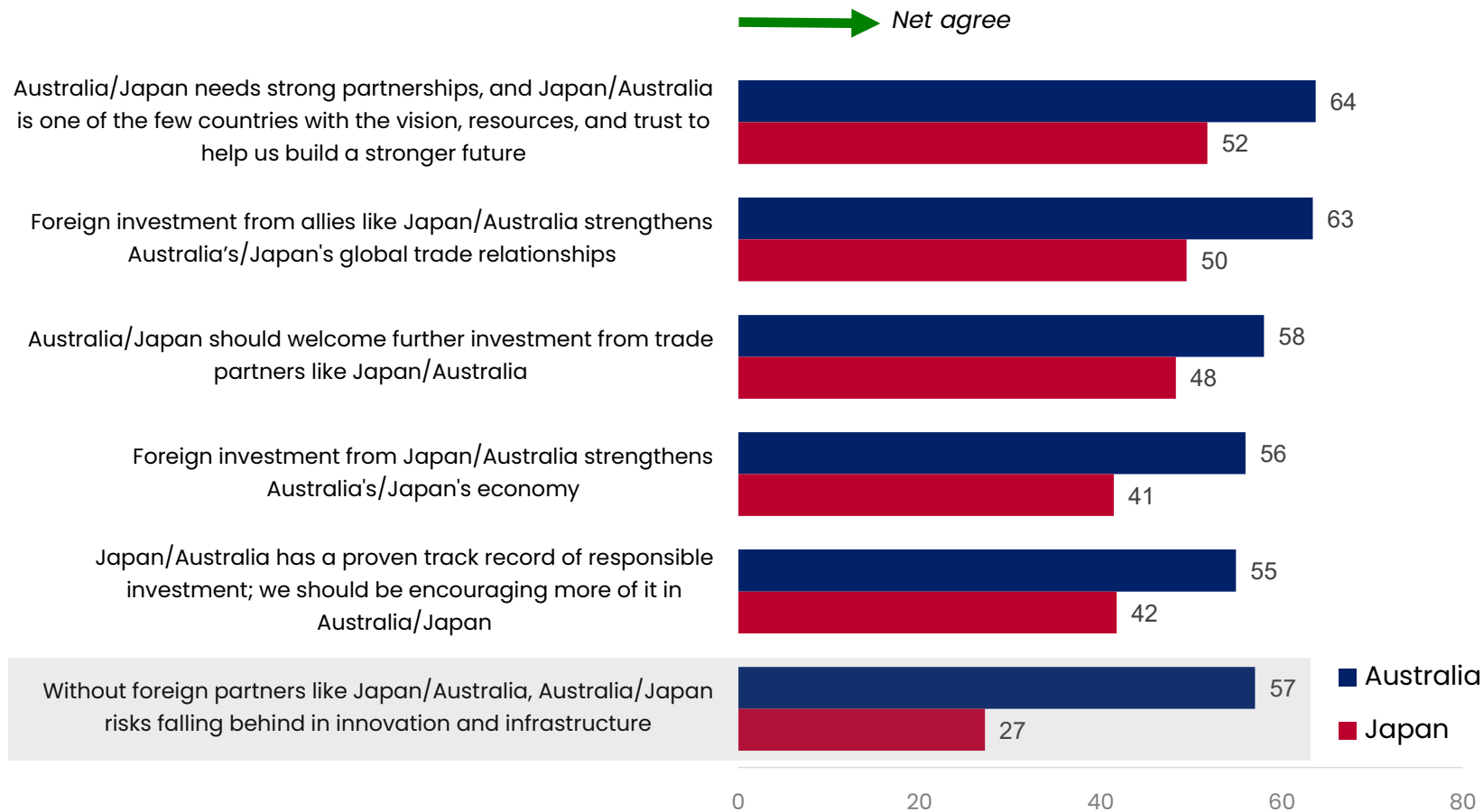
Beef & other agricultural products (54%) and other agricultural products including grains, dairy, and wine (39%) are considered the two most important products for trade for Japanese people.

For Australians, automobiles & vehicle parts (35%) and electronics & consumer technology (32%) were the most important.

Q: Which of the following products are most important for trade with Australia/Japan?  
Please pick up to 3

## TRADE STATEMENTS COMPARISON (NET)

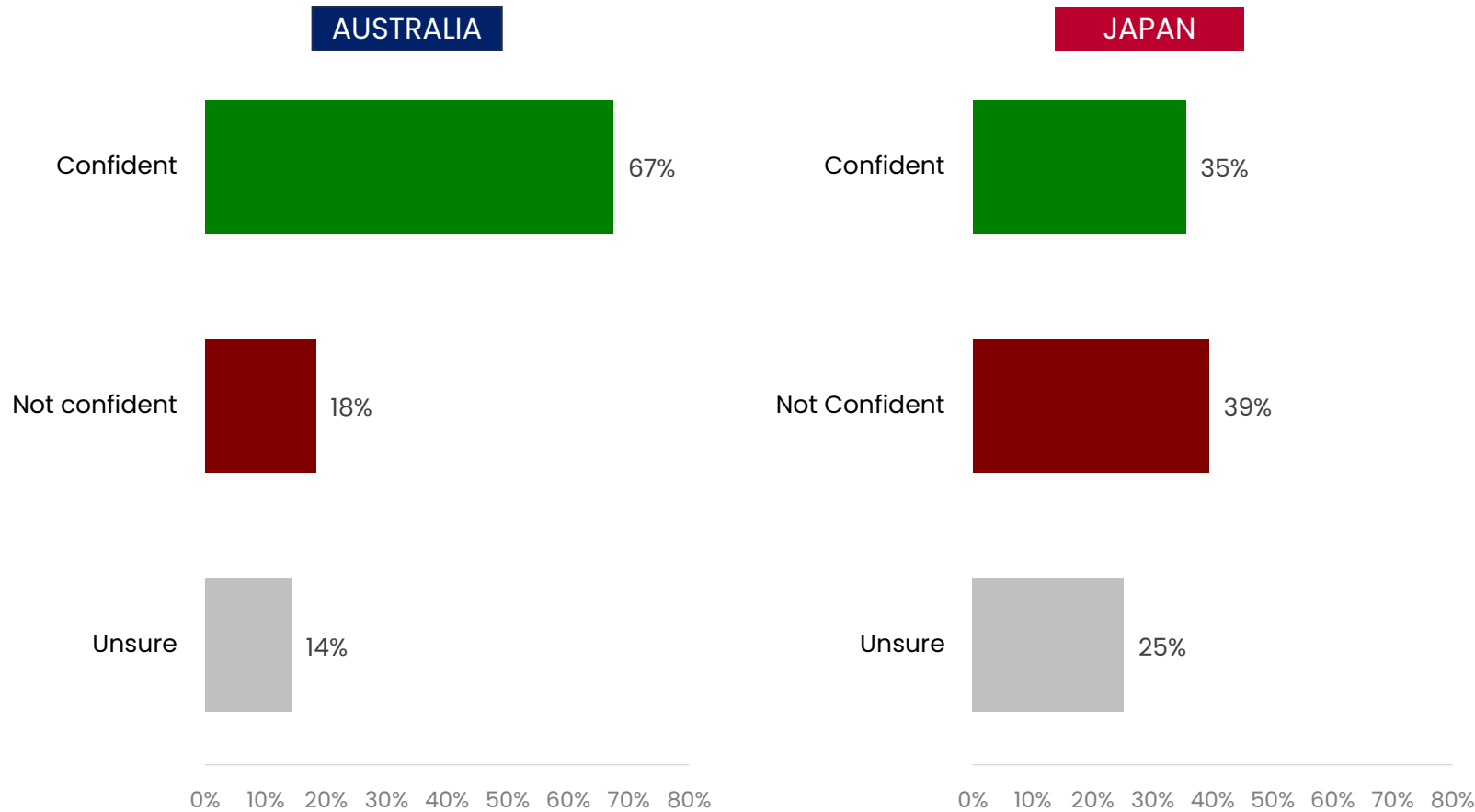
Both Australian and Japanese people are supportive of their countries having a strong partnership and having two-way investment



Q: To what extent do you agree or disagree with the following statements

## A STABLE PARTNER FOR TRADE AND INVESTMENT

# Australians are more likely to be confident in Japan as a trade partner than the Japanese are in Australia



Two in five Japanese people are not confident (39%) in Australia's economy as a stable trading partner with Japan.

In contrast, two thirds (67%) of Australians are confident in Japan's economy has a stable trading partner.

Q: To what extent are you confident, if at all, in Japan's economy as a stable partner for trade and investment with Australia?

Q: To what extent are you confident, if at all, in Australia's economy as a stable partner for trade and investment with Japan?

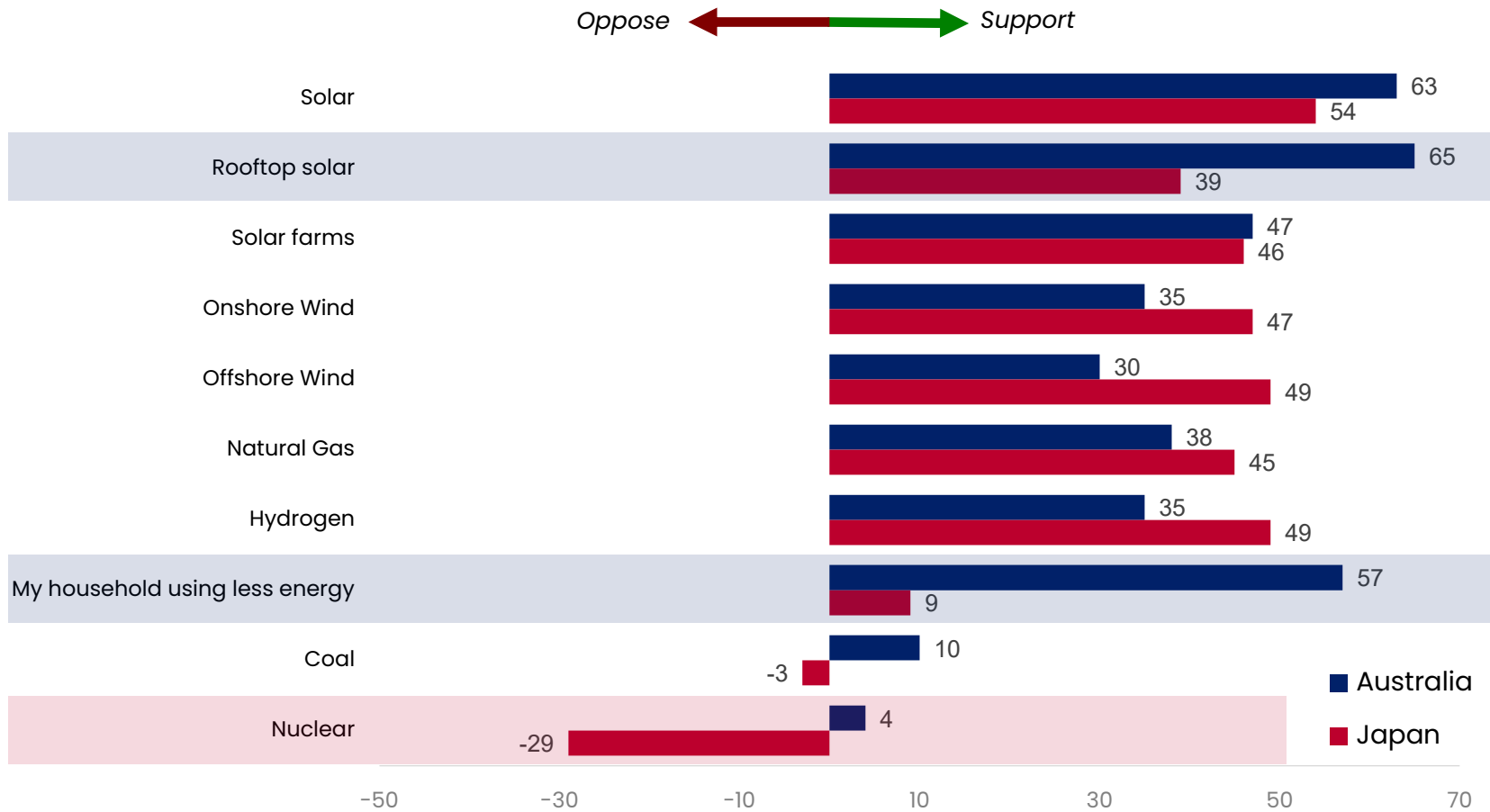


AUSTRALIA-JAPAN RESEARCH

# Energy & Resources

# ENERGY SOURCES COMPARISON (NET)

Australians and Japanese people diverge most regarding their household using less energy, followed by rooftop solar and nuclear



Australians are more supportive of rooftop solar when compared to Japanese people (NET +65 vs +39).

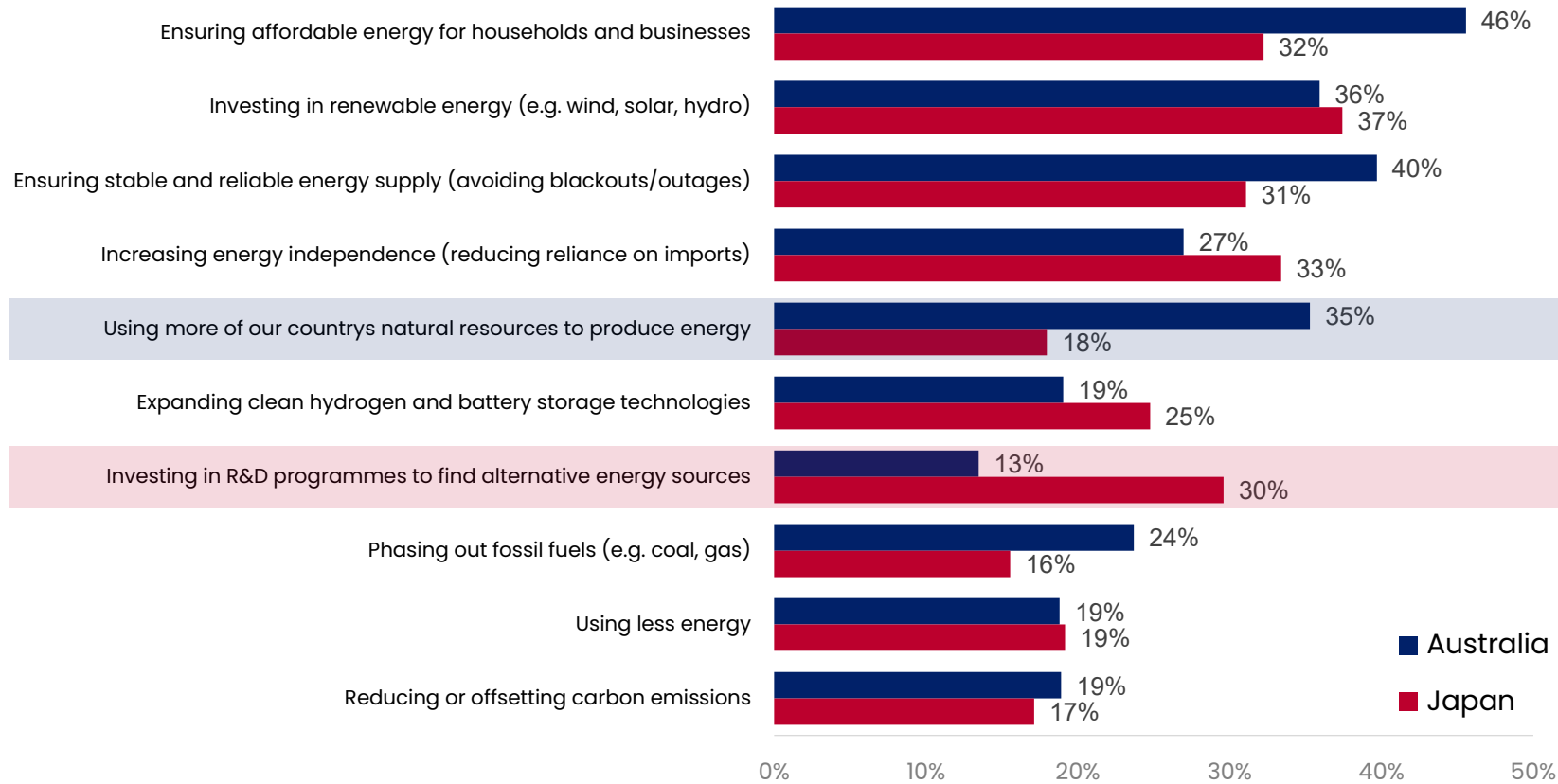
Japanese people are less willing to use less energy in their household, with only +9 in support compared to Australians at +57.

Nuclear is not supported by either voting cohort, especially the Japanese (+4 & -29).

Q: Do you support, or oppose, producing more energy from the following sources?

## ENERGY PRIORITIES

Investing in renewable energy, as well as ensuring affordable and reliable energy are priorities for both nations



Australians would like to prioritise ensuring affordable energy for households & businesses (46%) and ensuring stable & reliable energy supply (40%).

Japanese people have similar priorities over the next 10 years, investing in renewables (37%) and increasing energy independence (33%).

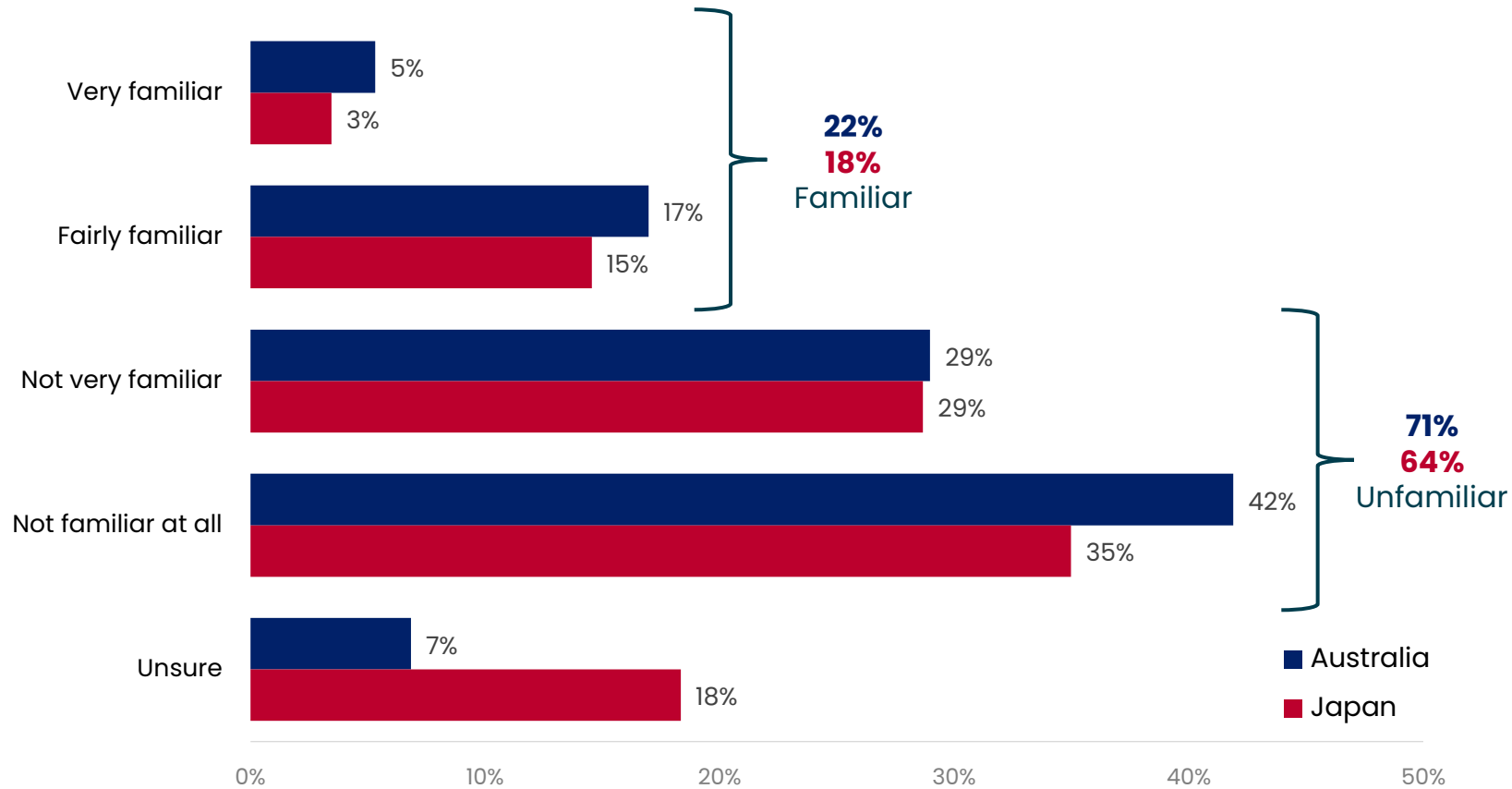
Australians are more supportive of using the countries natural resources (35% vs 18%).

Japanese people are more supportive of investing in R&D programs to find alternative energy sources (30% vs 13%).

Q: What should Australia/Japan prioritise over the next 10 years? Select up to three

## ENERGY-RELATED PROJECT PARTNERSHIPS

A clear majority of Australians and Japanese people are unfamiliar with any energy-related project partnerships between Japan and Australia

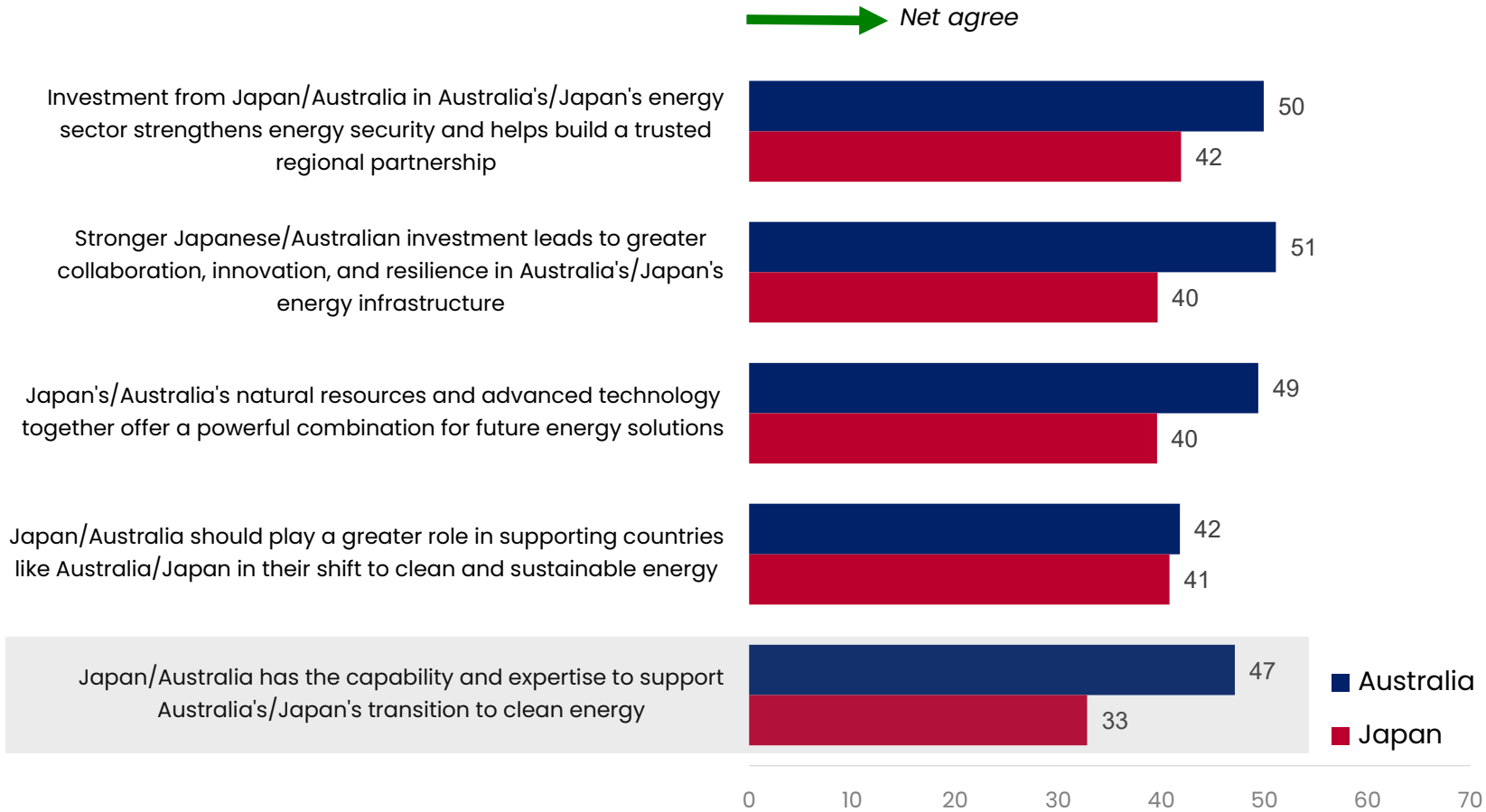


Almost half of Australians (42%) and one third of Japanese people (35%) are *not familiar at all* with any energy-related project partnerships between Japan and Australia.

Q: To what extent are you familiar, if at all, with energy-related project partnerships between Japan and Australia?

# ENERGY STATEMENTS COMPARISON (NET)

Both Australians and Japanese people agree with all energy-related statements

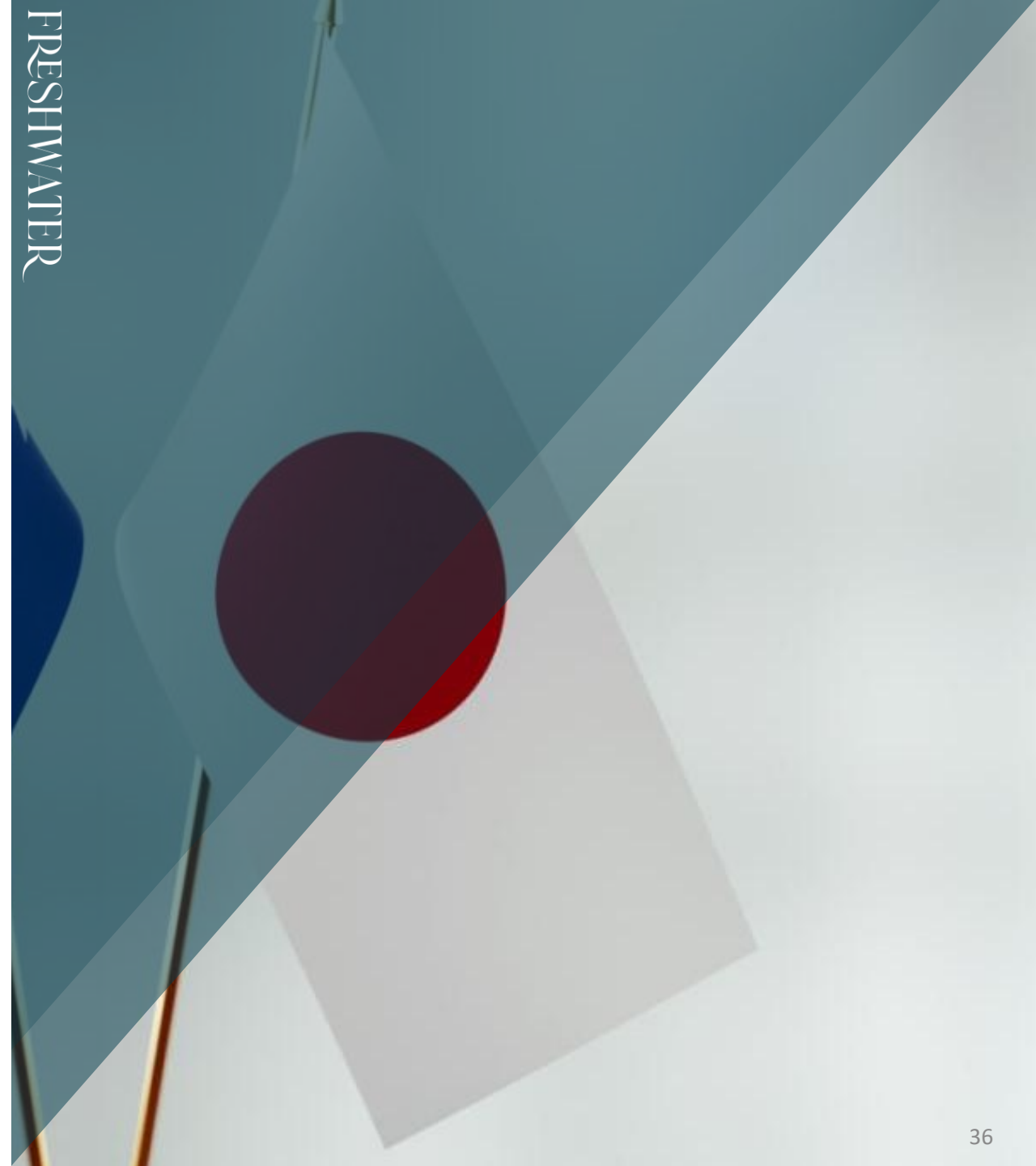


Q: To what extent do you agree or disagree with the following statements



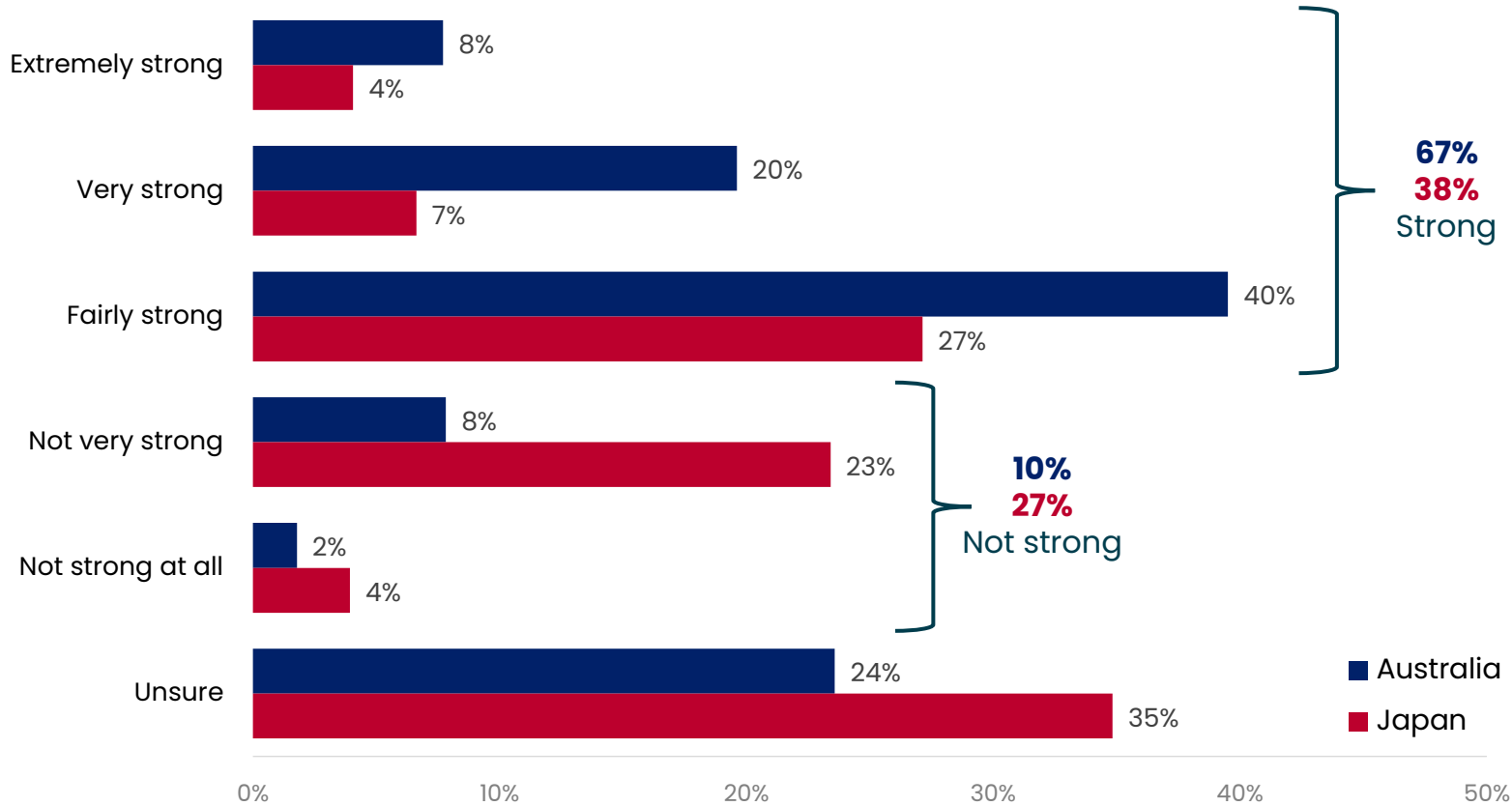
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# Defence



# AUSTRALIAN/JAPANESE DEFENCE RELATIONSHIP

## Australians view Australia and Japan's strategic defence relationship as much stronger than Japanese people



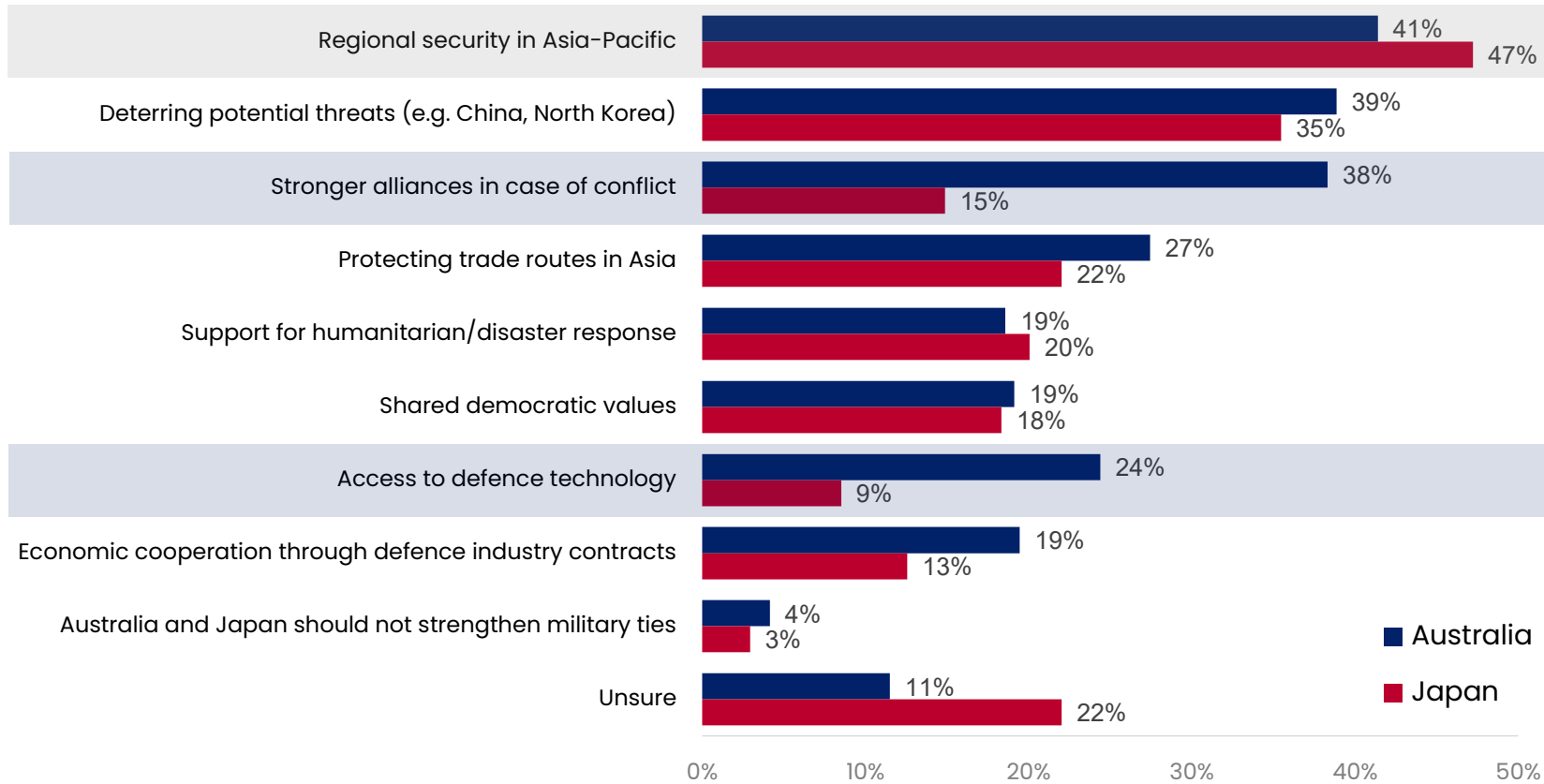
Two thirds of Australians (67%) view Australia and Japan's strategic defence relationship as strong, whereas only about one third of Japanese people (38%) view the relationship as strong.

Japanese people are more likely to say *not very strong* (8% vs 23%) or be *unsure* (24% vs 35%).

Q: How would you best describe Japan and Australia's strategic defence relationship?

## REASONS TO STRENGTHEN DEFENCE OR MILITARY TIES

Both nations see regional security in Asia-Pacific and deterring potential threats as the most important reasons to strengthen military ties



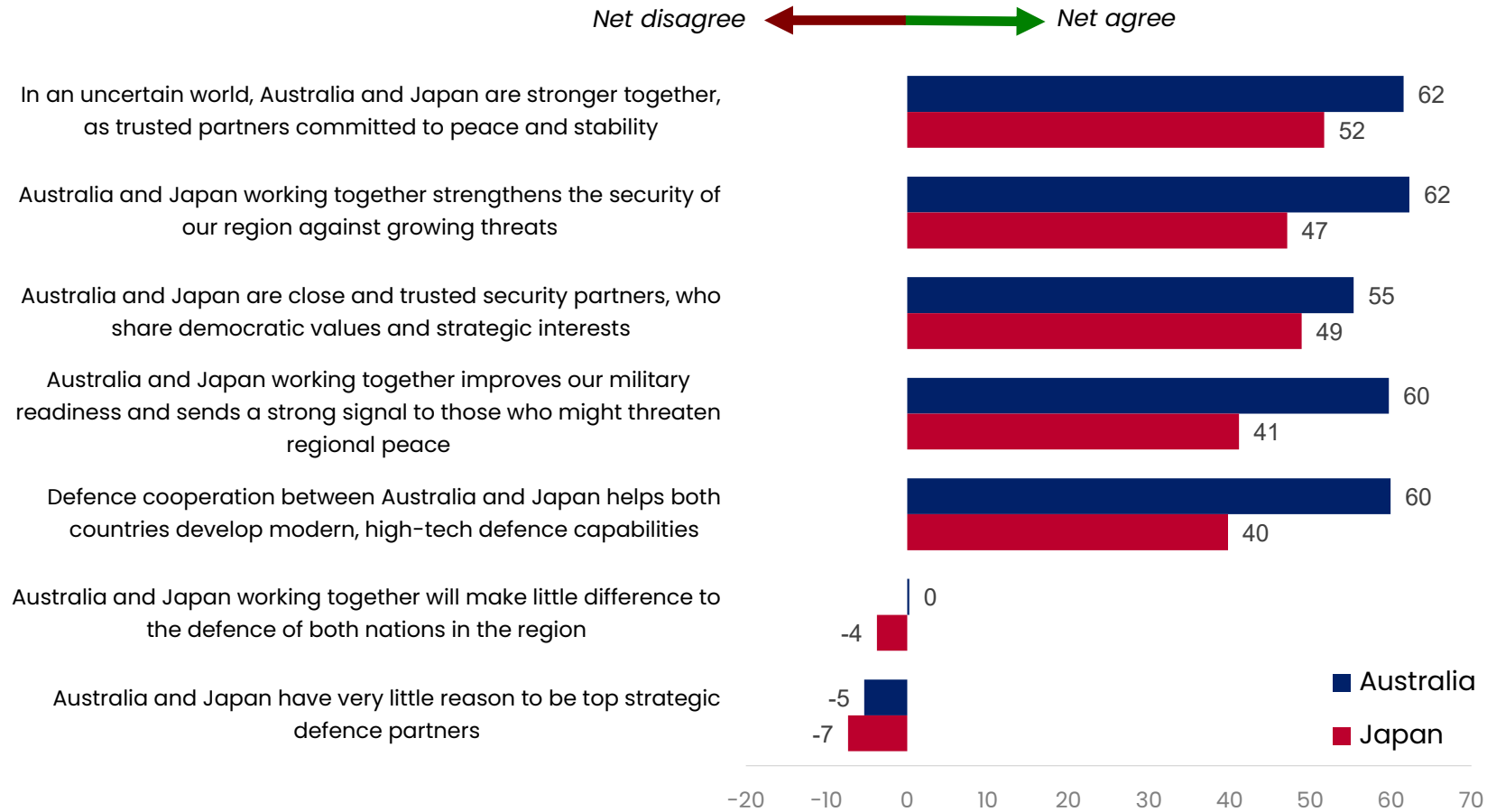
Regional security in Asia-Pacific (41% and 47%) and deterring potential threats (39% and 35%) are the two most important reasons to strengthen defence or military ties for both Australian and Japanese people.

Australians put more focus on a stronger alliance in case of conflict (38% vs 15%) and access to defence technology (24% vs 9%).

Q: What are the most important reasons for Australia and Japan to strengthen defence or military ties? Please pick up to 3

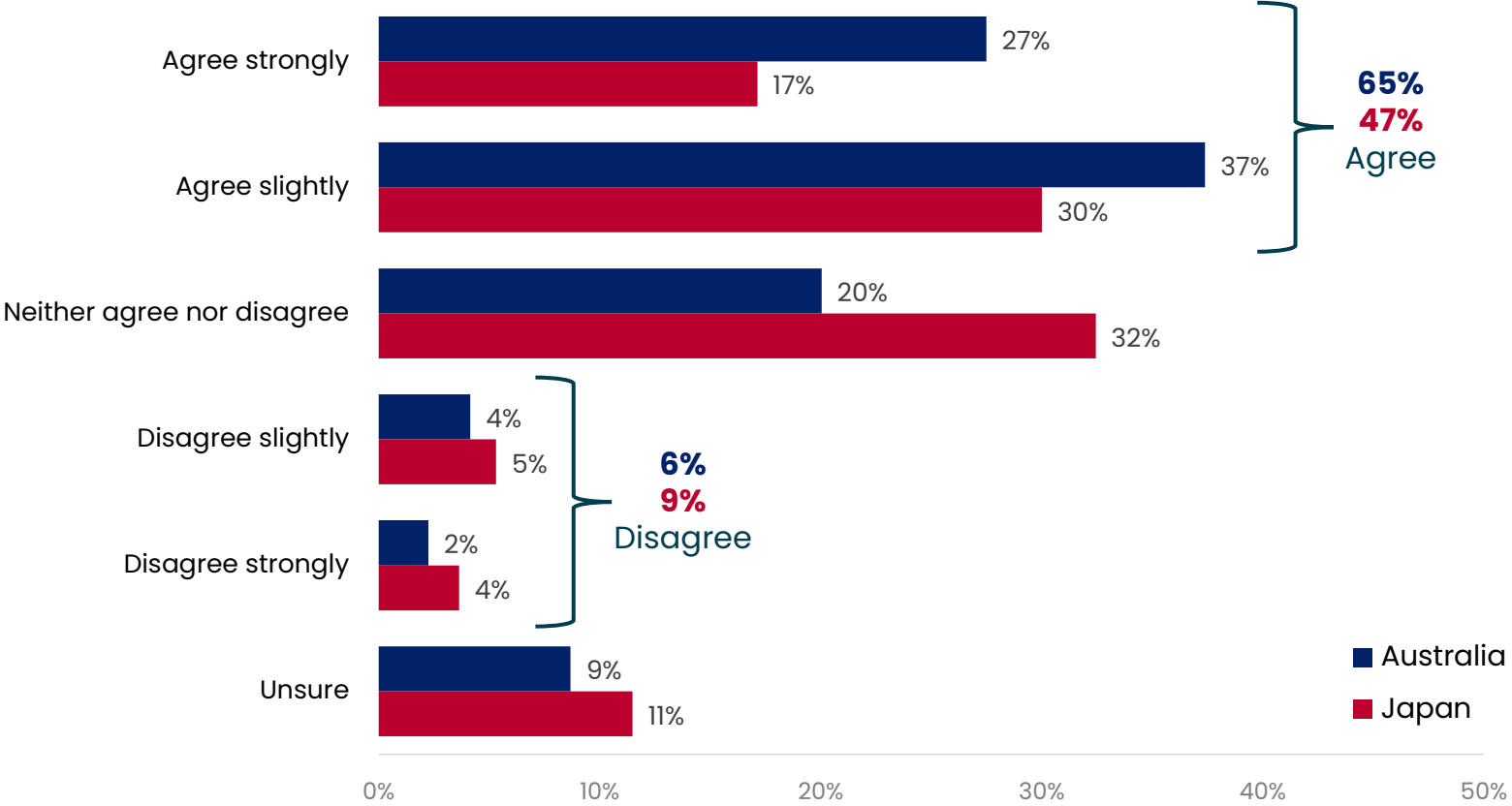
# DEFENCE PARTNERSHIP STATEMENTS COMPARISON (NET)

## Both Australians and Japanese people agree with statements in favour of greater defence cooperation



Q: To what extent do you agree or disagree with the following statements

AUSTRALIAN/JAPANESE MILITARY PARTNERSHIP  
 Both Australians and Japanese people largely agree with strengthening the military partnership between the two nations

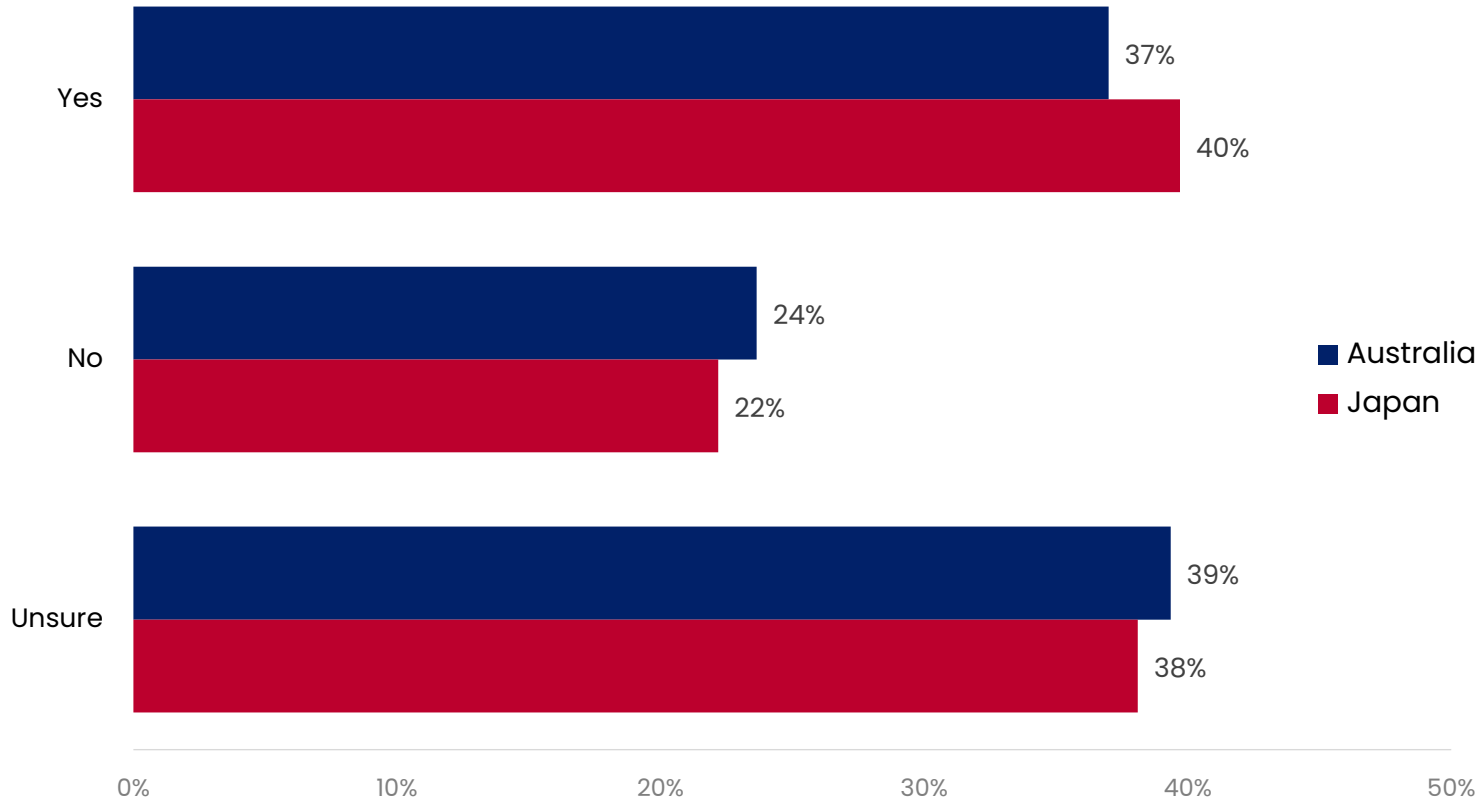


A majority of Australians (65%) and just under half of Japanese people (47%) agree that Australia and Japan should strengthen their military partnership.

Q: To what extent do you agree or disagree that Australia and Japan should strengthen their military partnership?

## MILITARY CONFLICT IN TAIWAN

Both nations are split as to whether Japan or Australia should support each other if a conflict was to break out in Taiwan



While just over one third of both Australians and Japanese people (37% and 40%, respectively) would be willing to support if a conflict broke out in Taiwan.

Another third of both Australian and Japanese people are unsure (39% and 38%, respectively).

Q: Hypothetically, if a military conflict were to occur in Taiwan, and Japan/Australia engaged in the conflict, should Australia/Japan support them?



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# Migration & Workers

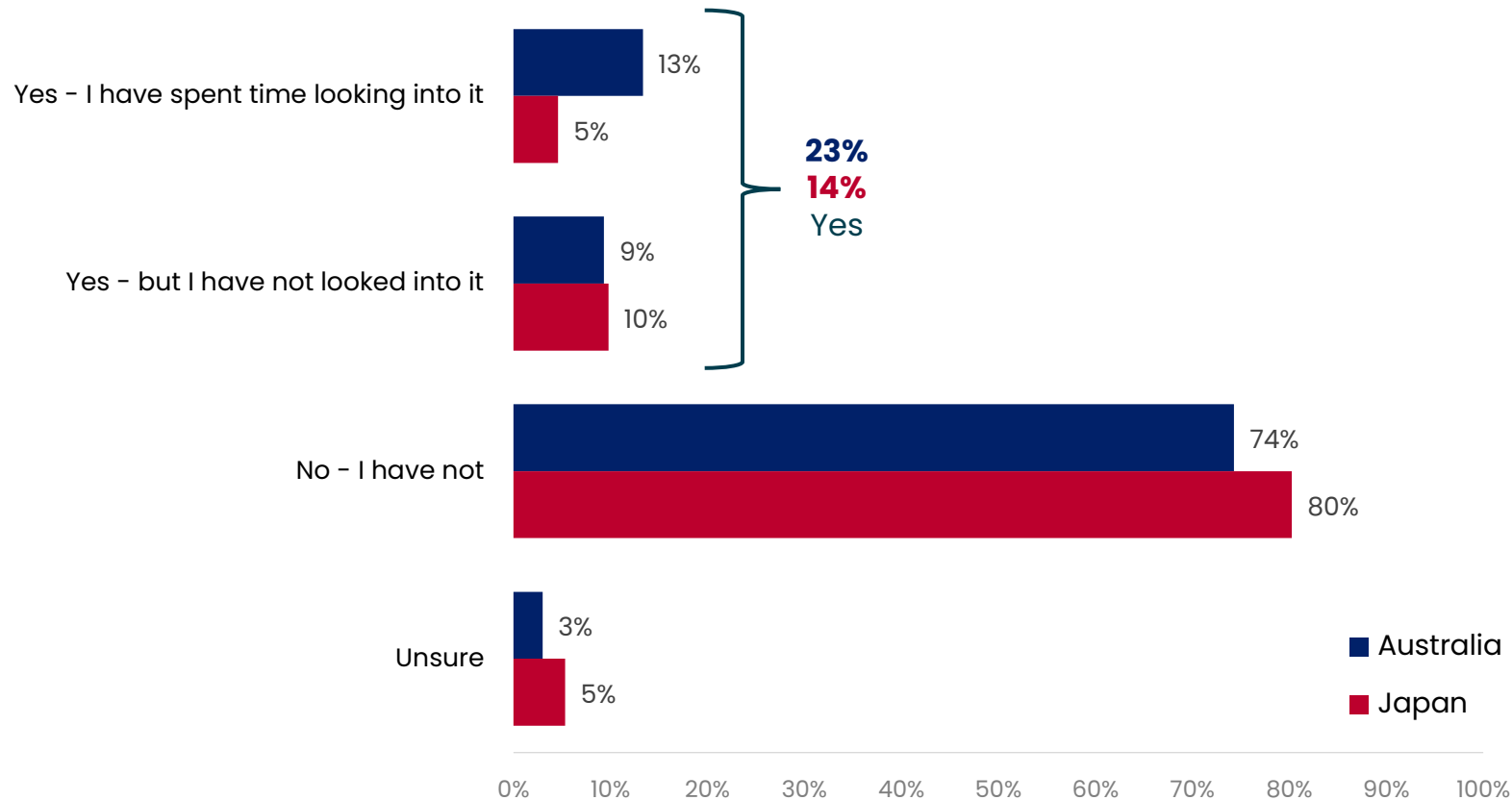
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## MOVING ABROAD

A clear majority of Australians and Japanese people have not considered moving abroad to live or work



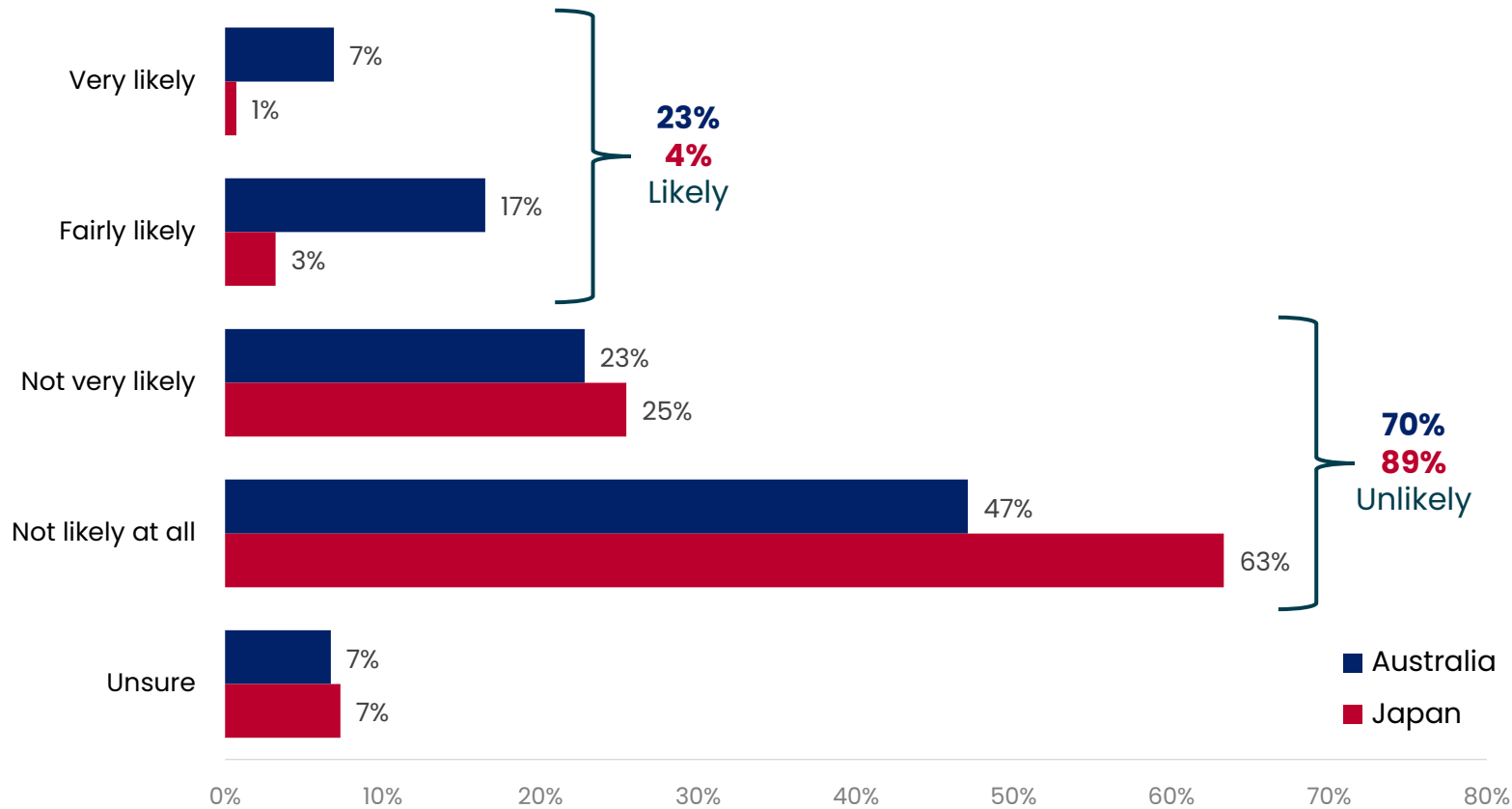
Only about one in ten Australians (13%) and one in twenty Japanese people (5%) have spent time looking into living and working abroad.

About one quarter (23%) of Australians have considered moving abroad, compared to one in seven (14%) of Japanese people.

Q: Over the last 12 months, have you ever seriously considered moving abroad to live and work?

## MOVING TO JAPAN/AUSTRALIA

Australians are significantly more likely to consider working or living in Japan when compared to Japanese people with respect to Australia



Australians are significantly more likely to consider working or living in Japan when compared to Japanese people considering working or living in Australia (23% vs 4%).

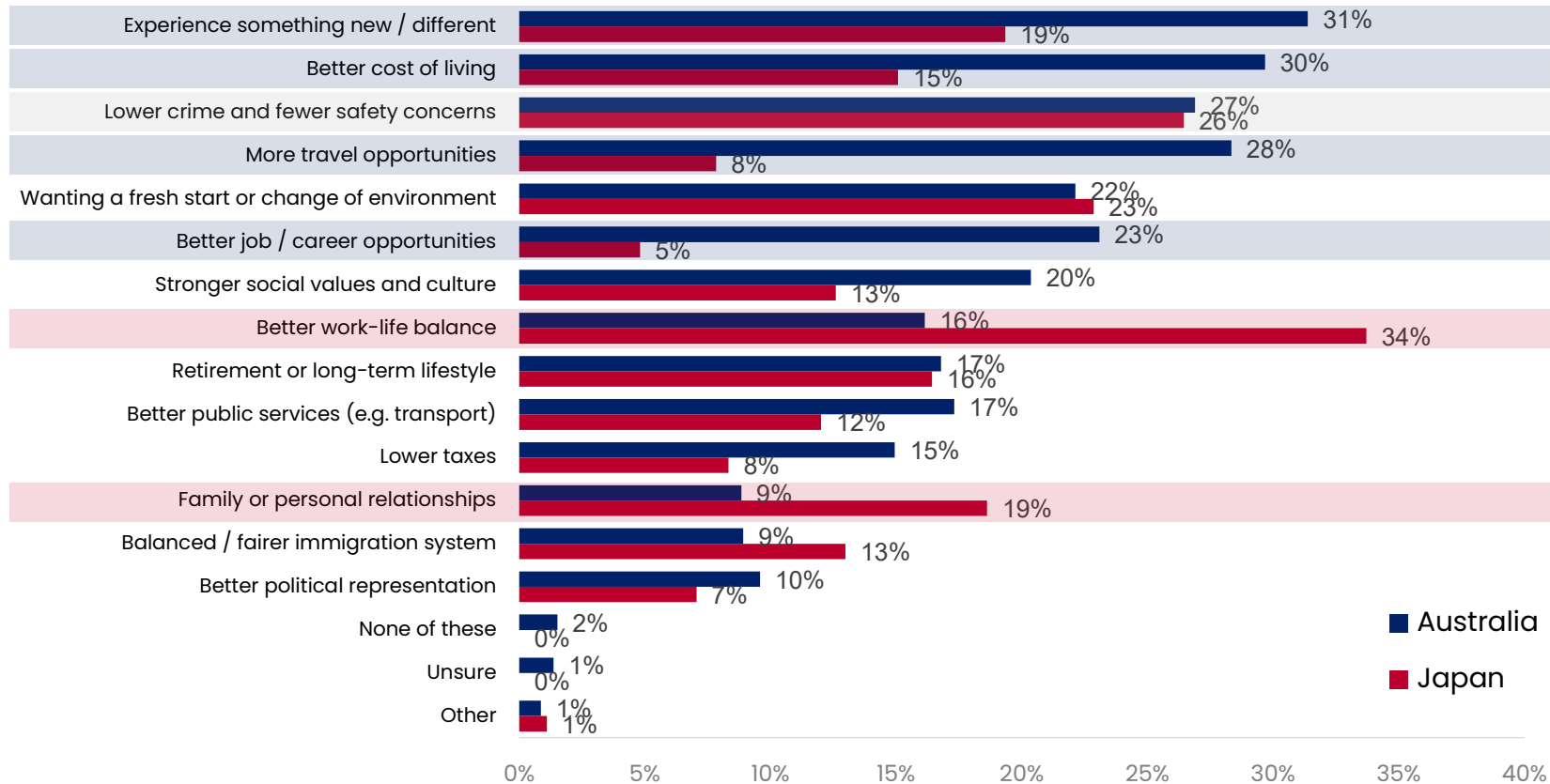
A majority of both nations are not likely to consider working or living in Australia or Japan (70% and 89%).

Q: How likely, if at all would you be to consider working or living in Japan/Australia in the future?

## MOTIVATIONS TO LIVE IN JAPAN/AUSTRALIA

Among those looking to move, Australians would look to move to experience something new while Japanese are looking for a better work-life balance

### AMONG LOOKING TO MOVE



Among those looking to move, the top reasons for Australians to move to Japan are to experience something new / different (31%), better cost of living (30%), and more travel opportunities (28%).

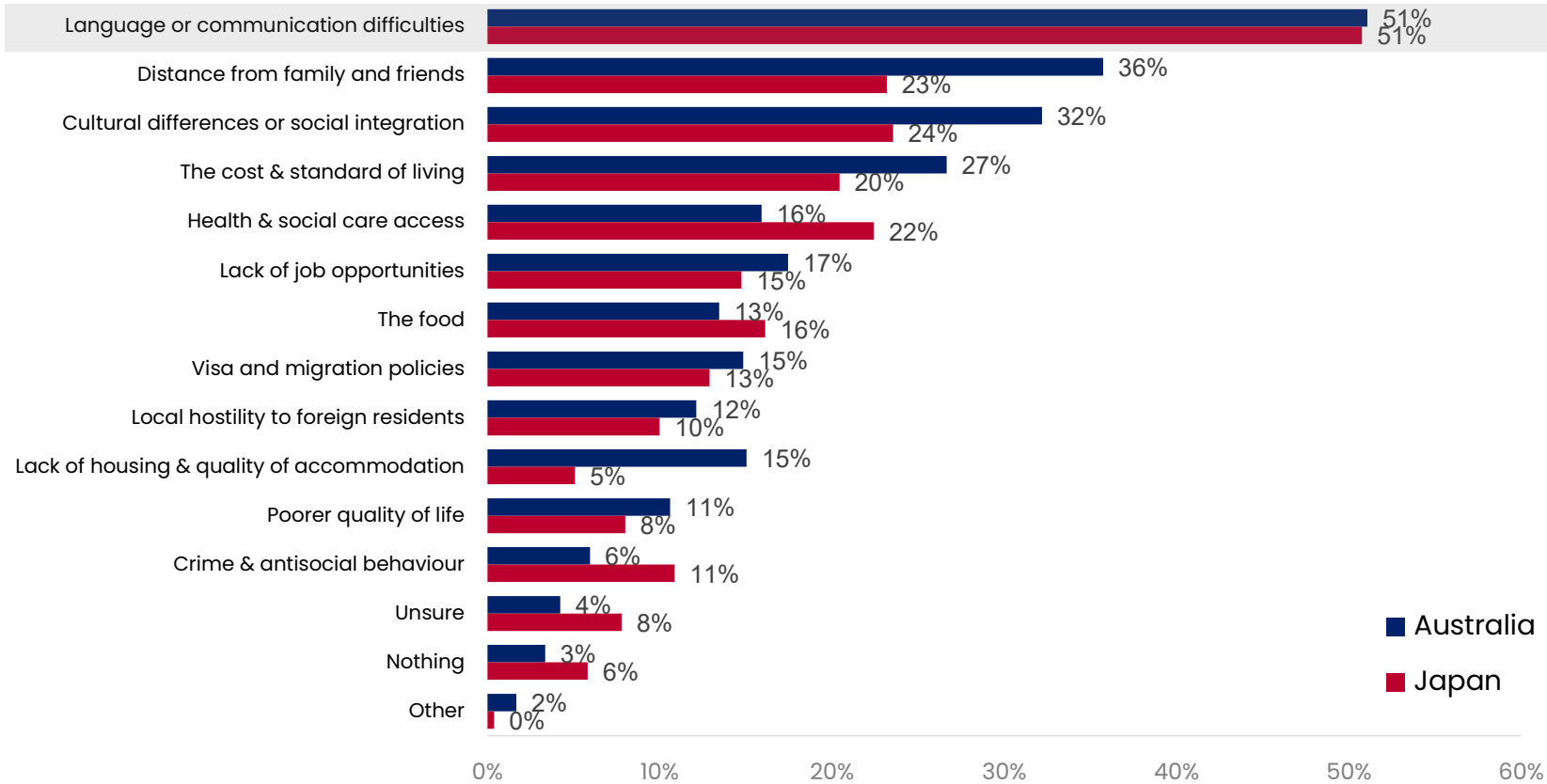
The top reasons for Japanese people to move to Australia are for a better work-life balance (34%), lower crime & fewer safety concerns (26%), and family or personal relationships (19%).

Both Australians and Japanese people say they would move for lower crime & fewer safety concerns (27% and 26%, respectively).

Q: What motivates you the most to want to live or work in Japan/Australia? Please pick up to 3

## BARRIERS TO LIVING IN JAPAN/AUSTRALIA

# Language or communication difficulties are the biggest barrier for both Australians and Japanese looking to move

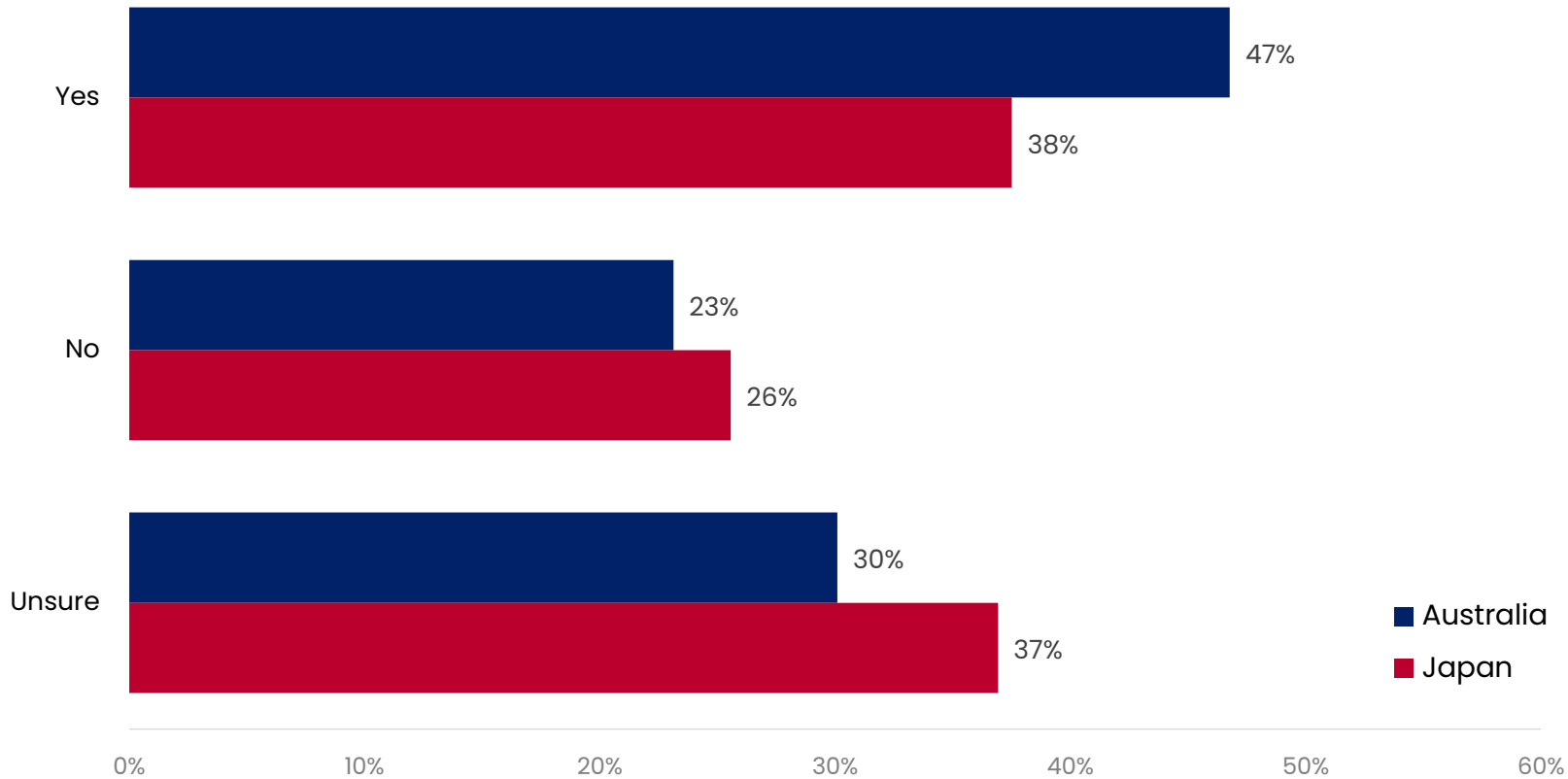


Language or communication difficulties are the biggest barrier for both Australians and Japanese moving, (51% and 51%, respectively).

Q: What do you think are the biggest barriers or challenges if you were to move to Japan/Australia? Please pick up to 3

## AUSTRALIA AND JAPAN MUTUAL SUPPORT

Both Australians and Japanese are more likely to support than oppose favourable terms for workers from the corresponding country



Just under half of AustralianS (47%) would support giving more favourable terms to the Japanese to live and work in Australia, though one third are unsure (30%).

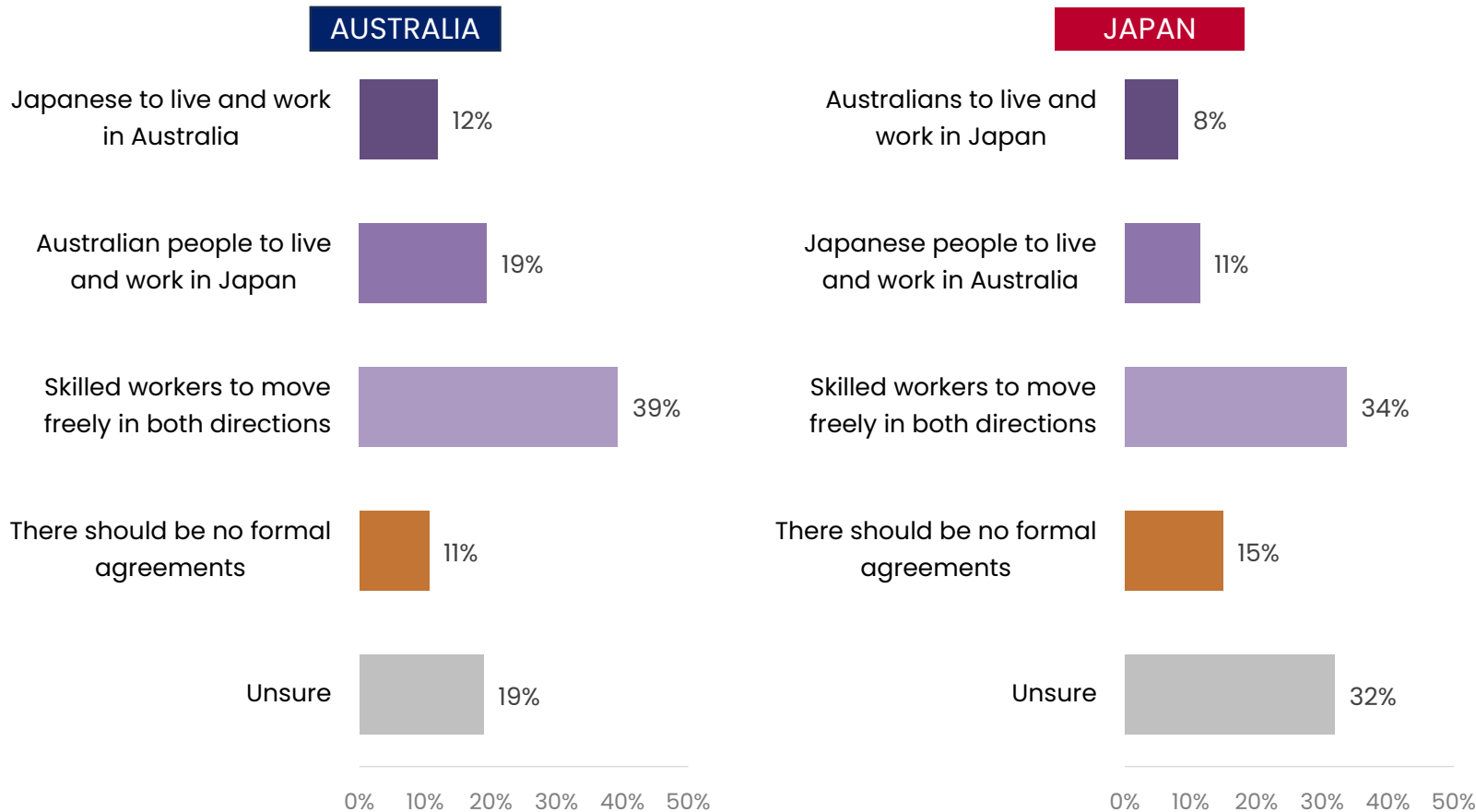
Japanese are also more likely to say yes (38%), though are comparably more likely to be split, with the same proportion being unsure (37%).

Q: In your view, should Australia give more favourable terms to the Japanese to live and work in Australia?

Q: In your view, should Japan give more favourable terms to Australians to live and work in Japan?

## SUPPORTING SKILLED WORKERS

Both nations are receptive to a formal agreement between Australia and Japan to allow skilled workers to move freely in both directions



About one third of respondents from both nations are receptive to a formal agreement between Australia and Japan to allow skilled workers to move freely in both directions, (39% and 34%, respectively).

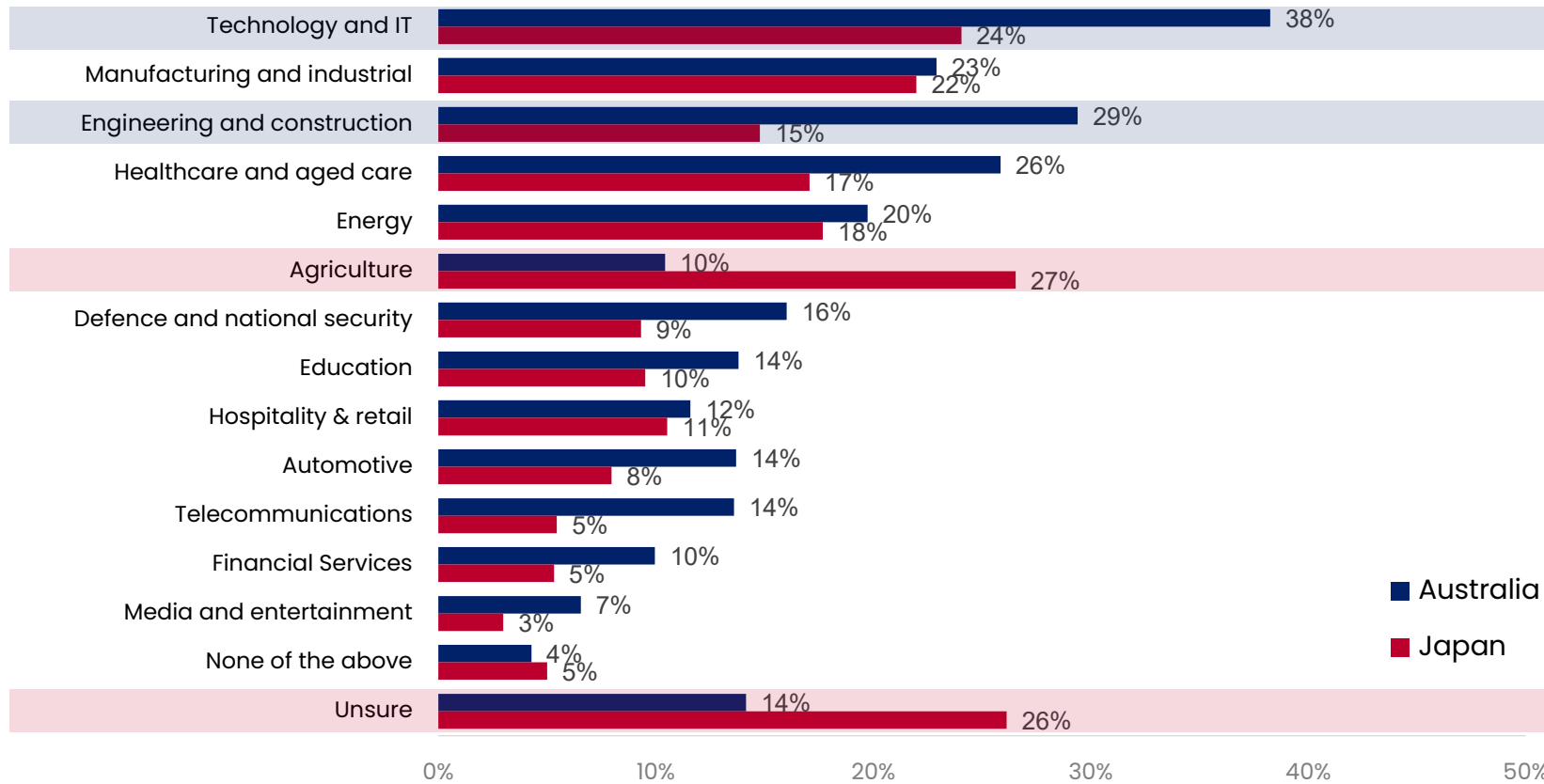
One in ten Australians (11%) and one in seven Japanese (15%) believe there should be no formal agreement.

Q: Which option best reflects your view on formal agreements between Australia and Japan to support skilled workers?

Q: Which option best reflects your view on formal agreements between Australia and Japan to support skilled workers?

## INDUSTRIES FOR SKILLED WORKERS

Australians think Japanese skilled workers should come for technology and IT, while Japanese want Australian skilled workers in agriculture



Australians think Japanese skilled workers should come for technology & IT (38%) and engineering & construction (29%).

Japanese want Australian skilled workers in agriculture (27%), but many are unsure (26%).

Q: ...and which organisation industries or sectors do you think skilled workers should be encouraged to work in? Please pick up to 3

THANK YOU