



# Japan-Australia Trade & Business Awareness Study 2025



**GMO-Z.com** Research

Survey platform: QuestionPro / Panel: GMO-Z.com Research

# Survey Overview

---

This study captures public perceptions in Japan and Australia on trade, investment, and future cooperation (e.g., clean energy), combining quantitative and qualitative insights to support business insights, market education, and communication strategies.

## Summary

---

This survey concludes;

- Japan has low awareness of AU-JA economic relationship, suggesting an information gap and high growth potential.
- Australia already understands the economic and structural benefits of the partnership.
- The study suggests ways to leverage these valuable insights for future action.

# Research Partners & Technology

## QuestionPro

SURVEY PLATFORM

Advanced enterprise-grade survey platform enabling complex logic settings, real-time analytics, and global scalability for sophisticated research.

-  50+ Question Types for Flexibility
-  Advanced Logic & Branching
-  Real-time Analytics & Reporting
-  Multilingual Global Platform

50+

QUESTION TYPES

Global

ENTERPRISE REACH

## GMO-Z.com Research

PANEL PROVIDER

The premier audience engagement platform providing access to high-quality consumer and business panels through APAC's largest network.

-  Cloud Panel Proprietary Network
-  Specialized in APAC Markets
-  B2B & B2C Broad Coverage
-  Rigorous Quality Control

65M+

TOTAL PANELISTS

14+

APAC MARKETS



### Project Implementation

Leveraging QuestionPro's advanced logic features and distributing via GMO-Z.com Research's high-quality Japan-Australia panels (General Consumer Monitors). Combining both strengths enabled precise data collection and deep insight extraction for this bilateral study.

# Background

---

---

Australia and Japan have built a long-standing trade and business connections across sectors such as energy, critical minerals, food, tourism, manufacturing, and investment.

Amid growing geopolitical instability, the need for supply-chain resilience, decarbonisation and energy transition, and secure access to critical minerals has made bilateral cooperation even more important.

Despite ongoing developments in cross-border business activities, there is limited quantitative evidence on how the general public understands and perceives these economic connections.

This study seeks to fill that gap by clarifying national sentiment in both countries.

# Objectives / Research Goals

---

---

- Measure public awareness of Australia–Japan trade and business activities.
- Compare attitudes toward trade, investment, and future areas of cooperation (e.g., clean energy).
- Identify and model the underlying psycho-structural drivers shaping public sentiment.
- Derive actionable implications for industry stakeholders and public-facing communications.

# Methodology

---

---

Mode: Online survey (QuestionPro) | Panel: GMO Z.com Research

Target: Adults aged 18+ in Japan and Australia

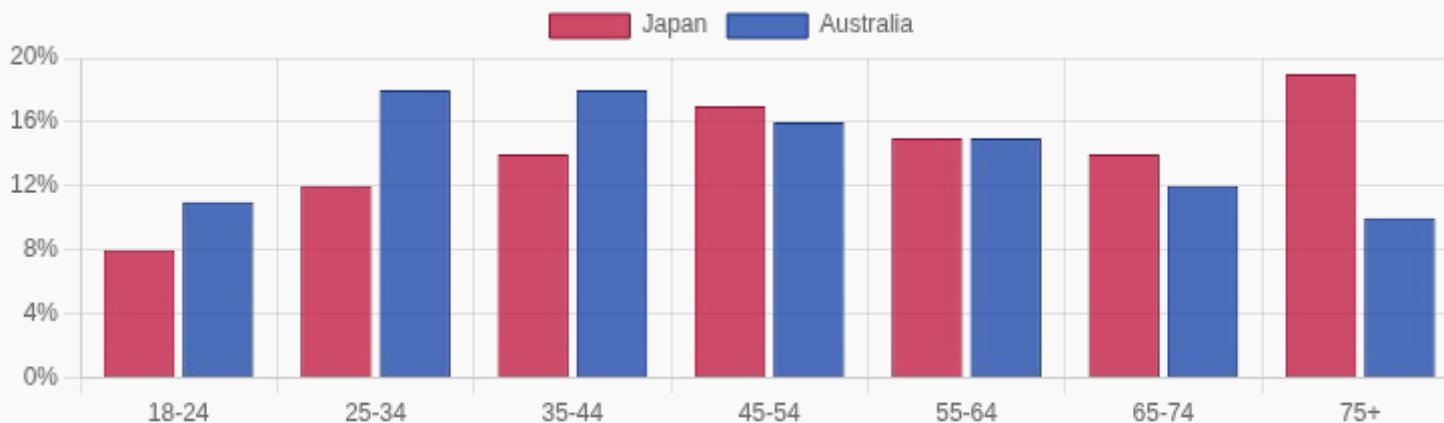
Sample sizes: Japan n=1,196 ; Australia n=1,118

Weighting: Adjusted to reflect the national 18+ population.

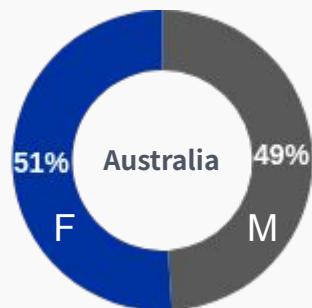
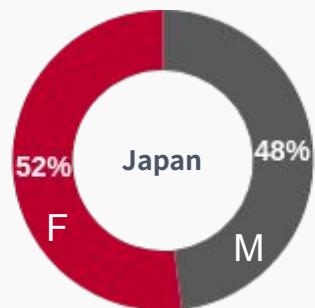
Duration: October 7–22, 2025

# Respondent Profile (Weighted)

## Age Distribution (Japan vs Australia)



## Gender Distribution



## Demographic Overview

The survey data has been weighted to reflect the national population structures of both countries, ensuring representative insights.

### Japan (n=1,196)

Male

48%

Female

52%

### Australia (n=1,188)

Male

49%

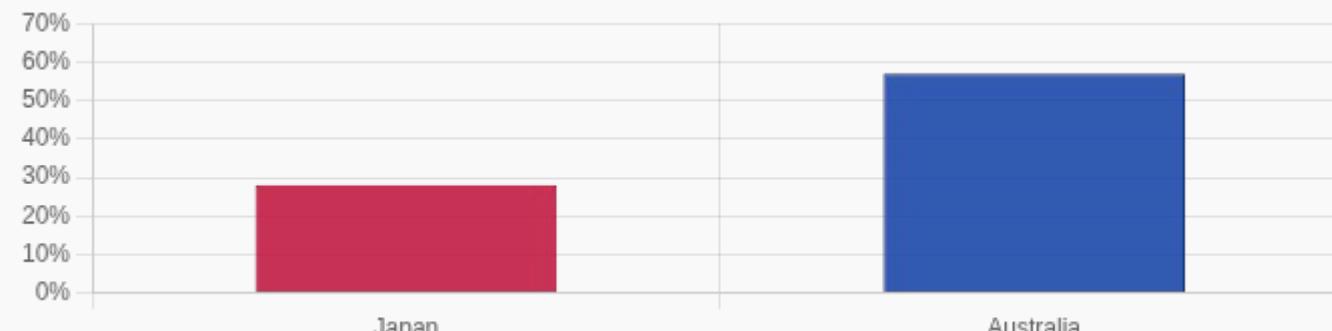
Female

51%

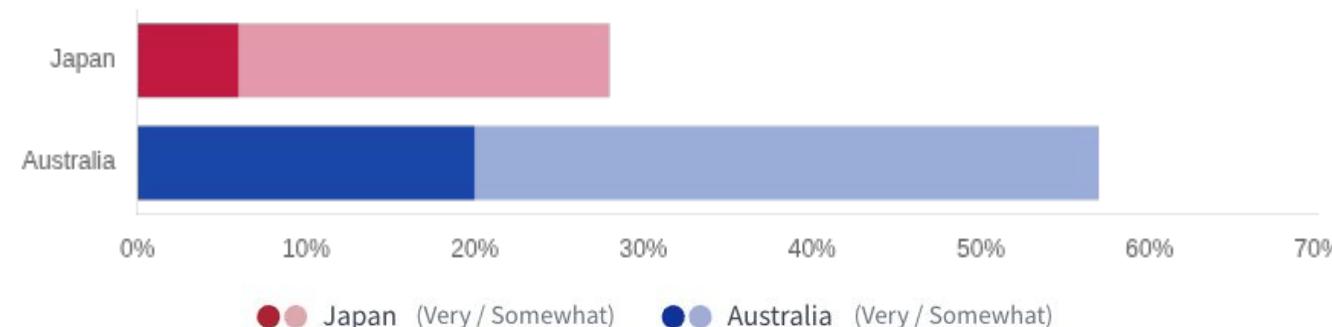
# Key Finding ①: Interest in Bilateral Economic Relations

## Key Findings

### Total Interest



### Interest Breakdown



### Key Insights

Japan: 28% Total Interest

Australia: 57% Total Interest

Australia shows more than double the interest level in bilateral relations compared to Japan (Top 2 Box scores).

### Data Breakdown

Australia: Strong "Very Interested" segment at 20%, supported by 37% "Somewhat Interested".

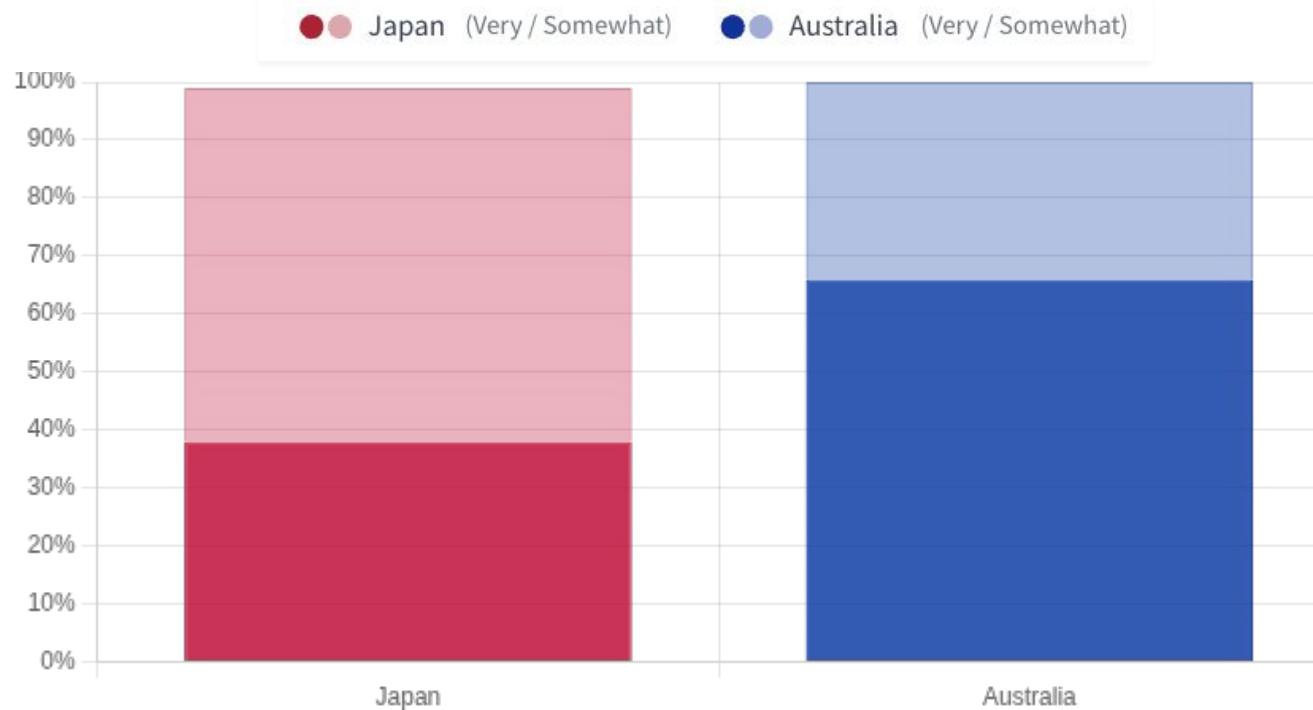
Japan: Only 6% are "Very Interested", with the majority of interest coming from the 22% "Somewhat Interested" segment.

### Implication

While a majority of Australians are engaged, Japan faces a significant engagement gap, with interest primarily being passive ("Somewhat") rather than active ("Very").

## Key Finding ②: Trade Awareness

### Trade Awareness in Japan-Australia Relations



### Understanding of Bilateral Trade

Japan:

37% understand trade relations | 63% don't know

Australia:

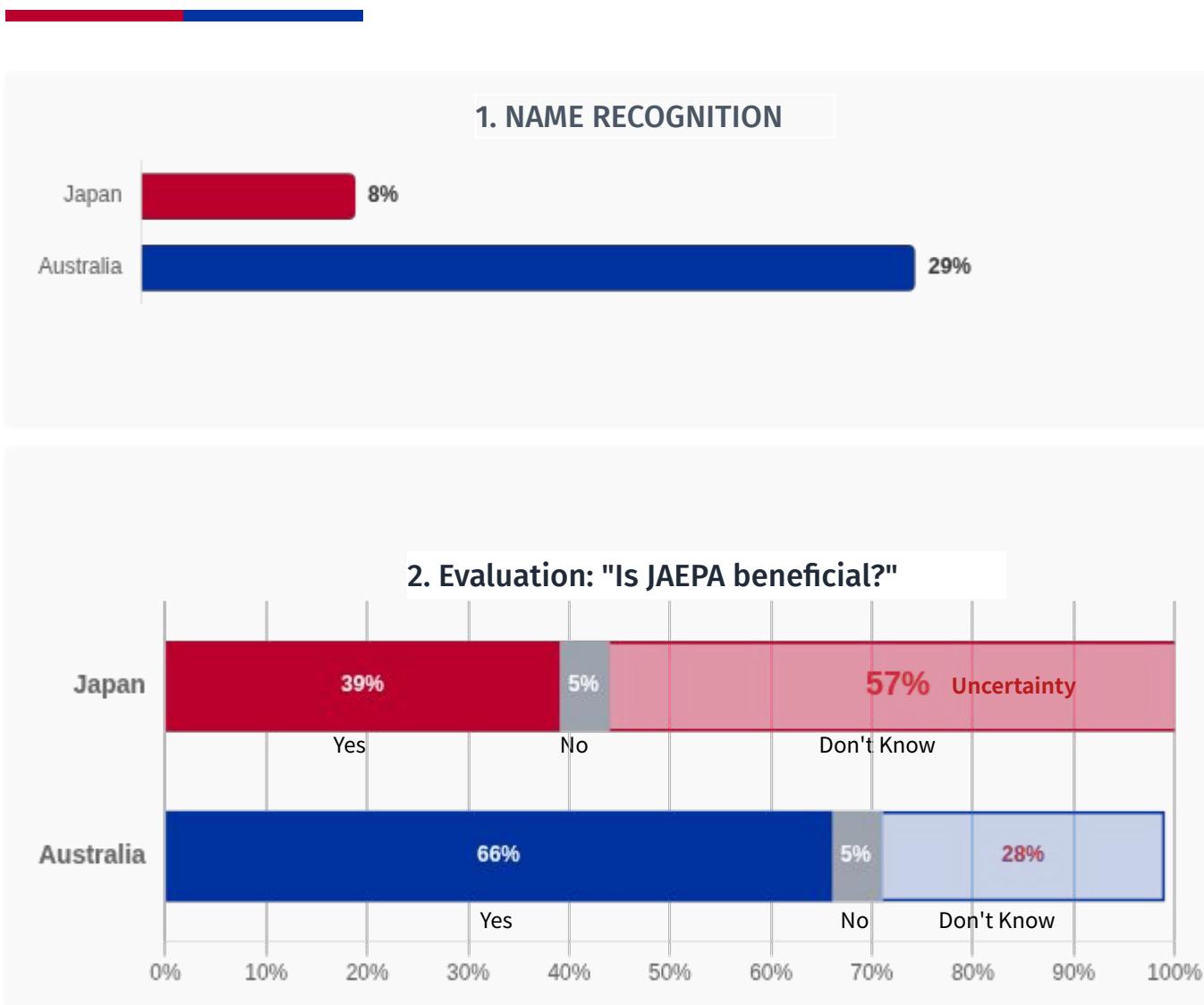
65% understand trade relations | 35% don't know

### Key Insight

Japan shows "low awareness due to information scarcity," indicating significant room for growth through targeted information campaigns.

This knowledge gap reflects an opportunity rather than active disinterest.

# Key Finding ③: JAEPA Recognition & Evaluation



## Recognition Gap

While specific name recognition is low in both countries, Australia (29%) shows significantly higher awareness than Japan (8%).

## Beneficial Evaluation Breakdown



## ⚠ Critical Insight: Uncertainty

57% of Japanese respondents answered "Don't know" regarding the agreement's benefits.

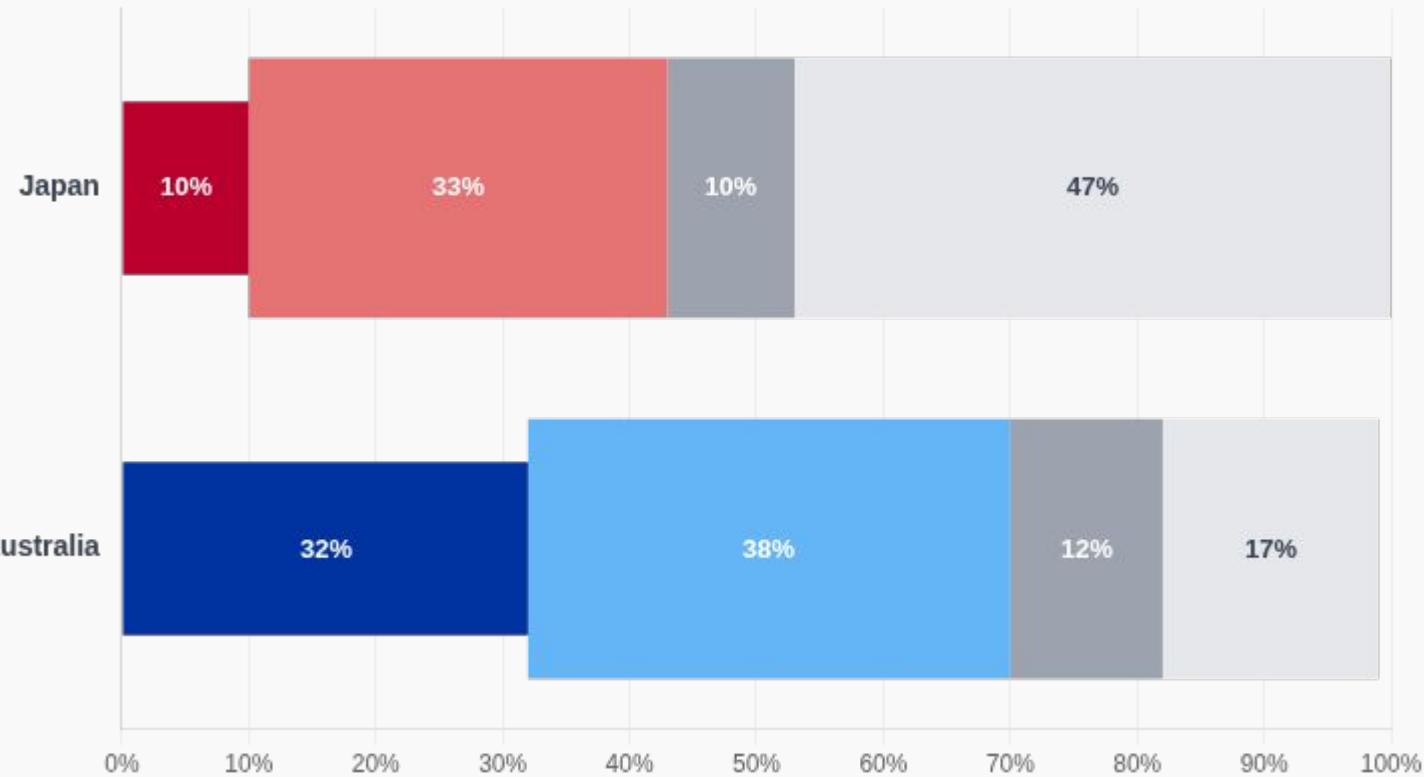
## 💡 Implication

Over half of the Japanese public remains uncertain about JAEPA benefits, indicating a significant communication opportunity to clarify mutual advantages.

# Key Finding ④: Attitudes Toward Investment

● Very Positive (JP) / ● (AU) ● Somewhat Positive (JP) / ● (AU) ● Little/No Impact ● Don't Know

## Detailed Breakdown: Impact on Local Economy & Employment



Question: "Investment flows between Japan and Australia are significant. How do you think these investments affect local economies and employment?"

## Sentiment Analysis

The updated color scheme reflects national identities while highlighting the stark contrast in sentiment engagement. The "information gap" in Japan remains the dominant feature.

### ● Japan

"Don't Know"

**47%**

Nearly half of Japanese respondents are unsure. Positive sentiment (Very + Somewhat) totals 43%, shown in red tones.

### ● Australia

"Very Positive"

**32%**

Strong engagement with 70% total positive sentiment, shown in blue tones. "Very Positive" is a key driver at 32%.

**"Negative Impact" is 0% in both countries.**

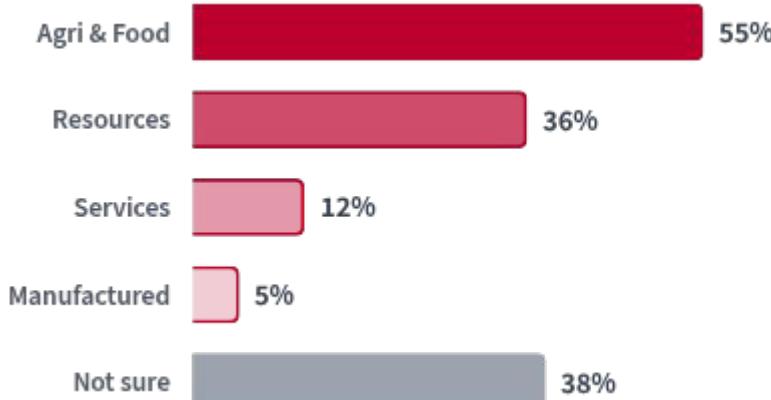
# National Image Characteristics

## Bilateral Perception Gap Analysis: Trade & Export Recognition

### JAPAN PERSPECTIVE

#### Japan's View of Australia

"What does Australia mainly export to Japan?"



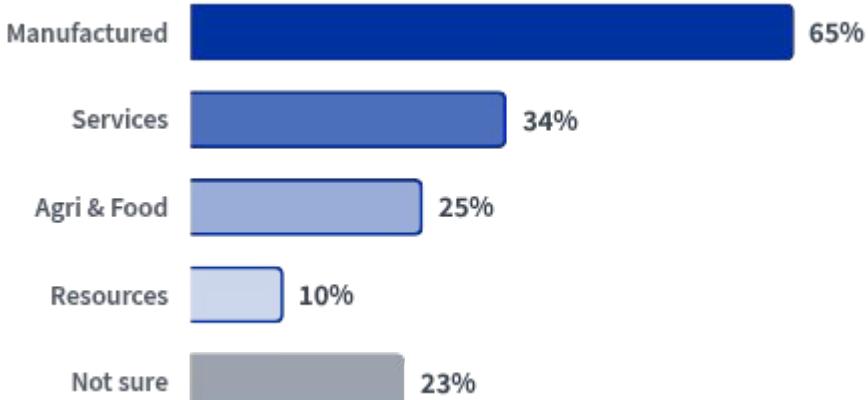
#### Perception: "Food & Resource Partner"

Strong "Food" image (55%) dominates, followed by Energy (36%). High "Not sure" (38%) indicates a knowledge gap regarding other sectors like services or manufacturing.

### AUSTRALIA PERSPECTIVE

#### Australia's View of Japan

"What does Japan mainly export to Australia?"



#### Perception: "Manufacturing Powerhouse"

Overwhelming recognition of Manufactured goods (65%) and Services (34%). Lower "Not sure" (23%) suggests a clearer, though perhaps traditional, brand image.

# Analysis

---

---

## Common Views & Differences

### Common Views

- Trusted, stable partners with shared values ("long-term partner", "similar values", "Japan/Australia is a trusted country")
- High acceptance of economic cooperation (opposition only 1-5% in both countries)
- Strong expectations for clean energy collaboration (highest expectations in any cooperation area)

### Differences

- Japan's view: Australia = "food nation"; resources & energy remain 'invisible' to consumers; information gap exists but not rejection
- Australia's view: Strong understanding of own resource sector; robust 'resources Australia × technology Japan' complementarity concept; high engagement with economic & diplomatic agenda

QUALITATIVE INSIGHTS

# Respondent Voices - AU

Open-ended responses from Australian participants reveal a deep-seated trust and a pragmatic optimism about the bilateral relationship.

TRUST & STABILITY

“

*"It is a very important economic relationship that has benefited both countries in the past and with continued agreement and cooperation it should last for many decades."*

Australian Resident • Male, 35-44

FUTURE COOPERATION

“

*"Japan-Australia relationships are based on mutual trust and benefits as both are sensible, mature and rational nations."*

Australian Resident • Male, 75 years or older

ECONOMIC PARTNERSHIP

“

*"Australia receives many of Japan's international exports and therefore the trading relationship is enhanced, also improving the global connections and relationship"*

Australian Resident • Female, 25-34

CULTURAL CONNECTION

“

*"I believe that Trade and tourism can benefit both countries and also the student exchange program could be increased as it strengthens understanding the two cultures in the education sector."*

Australian Resident • Female, 65 - 74 years

QUALITATIVE INSIGHTS

# Respondent Voices - JA

Japanese participants prioritize stability and security. Comments highlight a strong desire for resource stability, food security, and deepening cooperation in defense.

FUTURE COOPERATION

“

*"I believe that we should maintain our cooperative relationship to create a better future for both our nations."*

Japanese Resident • Female, 35-44

FOOD SECURITY

“

*"Japan relies on imports for food, so I believe food imports are critical. "*

Japanese Resident • Female, 35-44

ECONOMIC SECURITY

“

*"Sharing values, we should build a system to cooperate not just on resources but on cutting-edge technology and rare earths, keeping economic security in mind."*

Japanese Resident • Male, 65-74

STRATEGIC PARTNERSHIP

“

*"I believe we should further strengthen the areas where our two countries can complement each other, such as natural resources, the defense industry, and food supplies."*

Japanese Resident • Male, 45-54

# Strategic Framework & Analysis

Combining diagnostic insights with actionable strategies to bridge the divergence

## ▼ JAPAN: THE AWARENESS FUNNEL

### PHASE 1: BARRIER ANALYSIS



#### KNOWLEDGE GAP (57% "DON'T KNOW")

Diagnosis: Represents an "Information Gap", not distrust. Low awareness creates a "blank slate" with high potential for new narratives.

💡 Start with **WHAT: Tangible Goods**

### PHASE 2: COMMUNICATION APPROACH



#### EDUCATIONAL TONE

Strategy: Fill the information void. Positive baseline affinity ensures low resistance to factual engagement.

### PHASE 3: CONCRETE EXAMPLES (THE 'WHAT')



Aussie Beef



LNG / Gas



Hydrogen

## ▶ AUSTRALIA: THE GOODWILL AMPLIFIER

### PHASE 1: BARRIER ANALYSIS



#### ACTION GAP (66% POSITIVE)

Diagnosis: High Structural Understanding exists. The challenge is translating general goodwill into specific active support.

↳ Emphasize **WHY IT MATTERS: Impact**

### PHASE 2: COMMUNICATION APPROACH



#### OPPORTUNITY FOCUS

Strategy: Leverage understanding of complementarity. Connect economic ties to personal relevance (jobs, cost of living).

### PHASE 3: FUTURE SCENARIOS (THE 'WHY')



Job Creation



Green Energy



Security

# Market Communications Implications

---

---

Addressing the "Strategic Divergence" requires tailored approaches that respect each nation's starting point while converging on shared goals.

## Recommendations for Japan Educational Tone

- Broaden narrative from 'Food-Australia' to Energy → Critical Minerals → Clean Energy to fill the information gap.
- Focus on youth engagement and information exposure to reduce high uncertainty (57% "Don't Know").
- Emphasize household benefits (price/supply stability) rather than abstract treaty names.

## Recommendations for Australia Opportunity Focus

- Leverage 74% public optimism about future cooperation to drive concrete actions.
- Showcase visible clean-energy cooperation projects (e.g., Hydrogen supply chain) to amplify goodwill.
- Align messaging with Japan's technology and quality brand recognition.

## Joint Approach

- Integrate a unified narrative: Food × Resources × Technology × Clean Energy
- This integrated approach bridges the gap between Japan's "Awareness Funnel" and Australia's "Goodwill Amplifier".

# Conclusion

---

---

From distinct psychological starting points to a unified vision for future cooperation.

Australia–Japan relations are solidly reinforced at the public level by shared values of trust, stability, complementarity, and a future-oriented stance.

While investment attitudes show a gap (Australia 70% vs. Japan 43% positive), the fundamental acceptance of economic partnership remains robust.

## ❖ Strategic Convergence: Different Paths, Shared Goal



### JAPAN

Starting Point: 57% Info Gap

**Strategy: The Funnel**



### AUSTRALIA

Starting Point: 66% Goodwill

**Strategy: The Amplifier**

CONVERGING ON

★ **Clean Energy • Critical Minerals • Investment**