

# The State of Southeast Asia:

# 2021

SURVEY REPORT



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If you have any comments or enquiries about the survey, please email us at [asc@iseas.edu.sg](mailto:asc@iseas.edu.sg)

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ISEAS-Yusof Ishak Institute (formerly Institute of Southeast Asian Studies) is an autonomous organisation established in 1968. It is a regional centre dedicated to the study of socio-political, security, and economic trends and developments in Southeast Asia and its wider geostrategic and economic environment. The Institute's research programmes are grouped under Regional Economic Studies (RES), Regional Social and Cultural Studies (RSCS) and Regional Strategic and Political Studies (RSPS). The Institute is also home to the ASEAN Studies Centre (ASC), the Temasek History Research Centre (THRC) and the Singapore APEC Study Centre.

The ASEAN Studies Centre (ASC) was established in 2008 to research on issues pertaining to the Association of Southeast Asian Nations (ASEAN) as an institution and a process. Through research, publications, conferences, media engagement and outreach activities, ASC seeks to promote greater understanding of ASEAN and to contribute toward regional cooperation and integration. The Centre conducts studies and provides inputs to stakeholders on issues and matters that call for collective ASEAN actions and responses, especially those pertinent to the ASEAN Community building process. The ASC is the first institutional Recipient of the 2020 ASEAN Prize, a prestigious award to honour outstanding achievements of individuals or organisations who have made meaningful contributions to ASEAN.

# About the Survey

For the third consecutive year, the ASEAN Studies Centre at the ISEAS-Yusof Ishak Institute conducted *The State of Southeast Asia* survey to capture the views and perspectives of opinion-makers, policy-makers, and thought-leaders in the region. This year's survey was conducted from 18 November 2020 to 10 January 2021, and covers regional affairs and geo-political developments, including but not limited to current issues such as the COVID-19 pandemic. For the first time, three different language options were offered: English, Bahasa Indonesia and Vietnamese.

A total of 1,032 respondents from ten ASEAN member states participated in the online survey which drew from five categories of affiliation: (1) academia/research, (2) business/finance, (3) government, (4) civil-society/non-governmental/media, and (5) regional/international organisations.

While it is not meant to present the definitive Southeast Asian view of current affairs, the survey acts as a barometer of the general attitudes and perceptions of interested stakeholders on important regional developments. *The State of Southeast Asia Survey* has become a staple reference source in studies on Southeast Asia and ASEAN.

The survey has 7 sections: (1) Respondents' Profile, (2) Regional Outlook and COVID-19, (3) Issues of Concern to ASEAN, (4) Regional Influence and Leadership, (5) ASEAN in the Middle, (6) Perceptions of Trust, and (7) Soft Power. The reporting of the questions and results has been re-organised for optimal flow and logic. The figures in this report have been rounded up or down to the nearest one decimal point.✿

# Survey Highlights

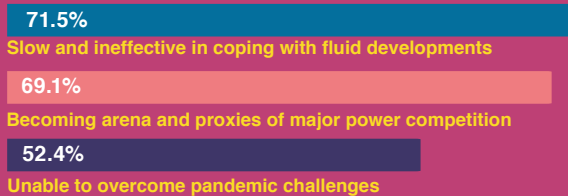
**1** Southeast Asia is preoccupied with the COVID-19 pandemic and recovery process. The threat to health from COVID-19 (76.0%) is currently the region's most pressing concern, followed by unemployment and economic recession (63.0%) and the socio-economic gaps and income disparity (40.7%). Terrorism is ranked last (5.2%), after deteriorating human rights conditions (12.6%).

Top 3 challenges in Southeast Asia



**2** Southeast Asians' top concern about ASEAN is that it is slow and ineffective and thus cannot cope with the fluid political and economic developments (71.5%). In the same vein, 52.4% worry that ASEAN is unable to overcome the current pandemic challenges. Geo-politics is also not far from everyone's mind as 69.1% fear that ASEAN is becoming an arena of competition among major powers and its members may become their proxies. Fears that ASEAN may become irrelevant in the new world order is ranked last (22.1%).

Top 3 concerns about ASEAN



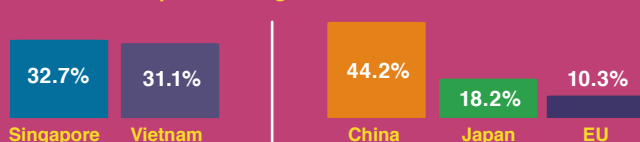
**3** The majority of Southeast Asians (60.7%) approve of their governments' response to COVID-19. A large majority (84.8%) of these approving respondents feel that their governments have acted effectively in implementing public health measures to mitigate the outbreaks. In terms of what governments can do better to address the pandemic, 49.0% feel that financial relief and subsidies are needed.

Approval ratings of governments' COVID-19 response



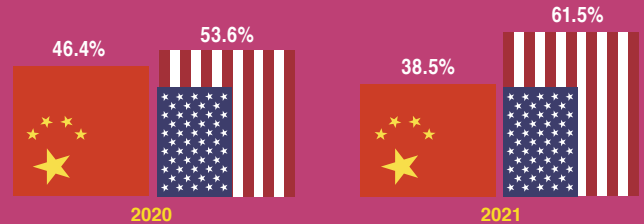
**4** In terms of COVID-19 leadership, respondents vote almost equally for Singapore (32.7%) and Vietnam (31.1%) for providing best leadership to ASEAN. In terms of provision of COVID-19-related assistance, 44.2% pick China, followed by Japan (18.2%) and the EU (10.3%) as providing most help to this region.

ASEAN leadership and Dialogue Partners' assistance on COVID-19



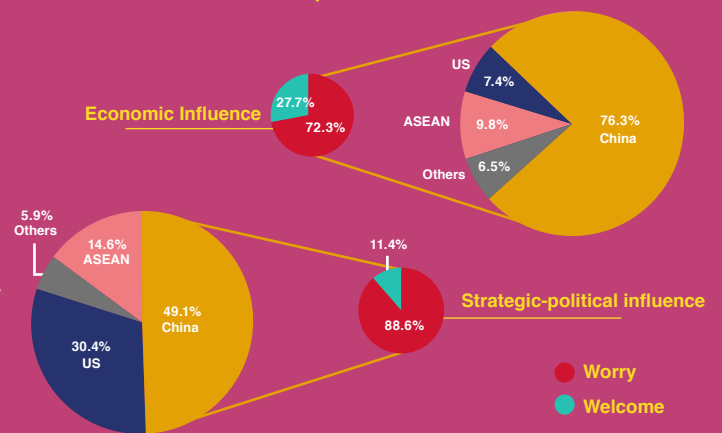
**5** If forced to align oneself in the on-going US-China rivalry, the majority of respondents choose the US (61.5%). China as a choice dropped from 46.4% in 2020 to 38.5% in 2021, even despite intensive COVID-19 diplomacy seen in the region. When asked how ASEAN should best respond to Beijing and Washington's barbs, the majority (53.8%) prefer to have ASEAN enhance its own resilience and unity to fend off their pressures.

Binary choice between China and the US



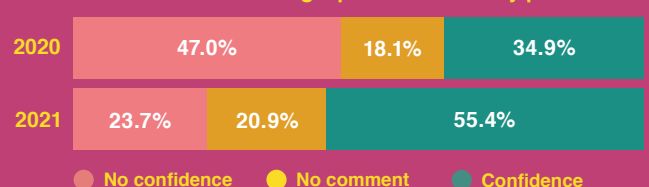
**6** China remains the undisputed influential economic power in the region according to 76.3% of respondents. Majority of those (72.3%) who view China in this way point to worries about its growing economic influence. China continues to be seen as the most influential political and strategic power (49.1%), which also engenders considerable anxiety over Beijing's strategic clout in the region (88.6%).

Most influential power in Southeast Asia



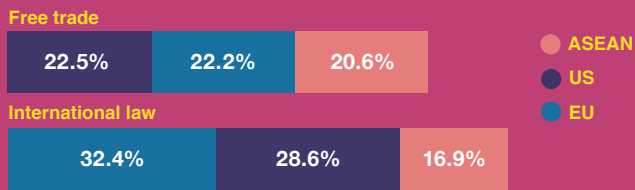
**7** In contrast, even with out-of-control COVID-19 outbreak, record number of deaths, pandemic-induced recession, racial tensions and assaults on democracy in the US, the region is still welcoming of Washington's strategic influence (63.1%), an increase from 52.7% last year. Likewise, the share of respondents having confidence in the US as a strategic partner and provider of regional security increased from 34.9% to 55.4% this year. This positive view of the US may well be attributed to the anticipation that the Biden Administration will elevate American engagement with the region (68.6%).

Trust in the US as a strategic partner & security provider



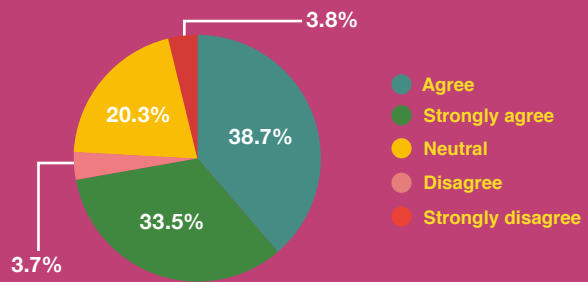
8 Expectations of different players in alleviating the stresses on multilateral free trade and the championing of international law continue to be divided. Southeast Asian respondents (32.4%) view the ability of the European Union (EU) to provide leadership in maintaining a rules-based order and upholding international law positively. Respondents are equally split between the US (22.5%), the EU (22.2%) and ASEAN (20.6%) in the ability to champion international trade.

**Leadership in championing free trade and international law**



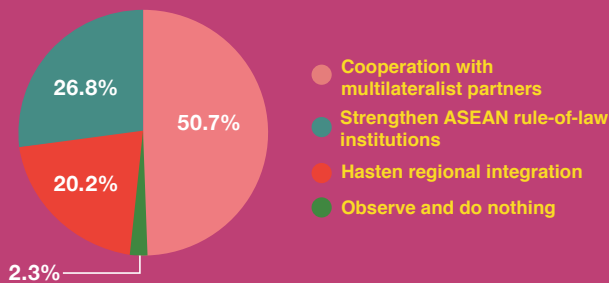
11 The majority of Southeast Asians (72.2%) suggest ASEAN should discuss the Mekong River issues in its agenda. 46.3% in this cohort are concerned about the Mekong's environmental problems and their impact on regional food security while 32.9% regard the Mekong as a geo-political space where ASEAN should play a more active role.

**Should ASEAN discuss Mekong River issues?**



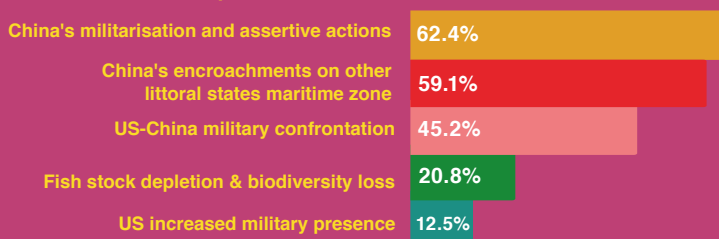
9 In this global leadership vacuum, Southeast Asians exhibit a steadfast partiality for openness and integration to respond to rising protectionism and nationalism around the world. 50.7% prefer that ASEAN “deepen cooperation with like-minded multilateralist partners beyond ASEAN”, followed by strengthening of ASEAN institutions that support the rule of law (26.8%) and hastening regional integration within ASEAN (20.2%).

**ASEAN's best response to protectionism and nationalism**



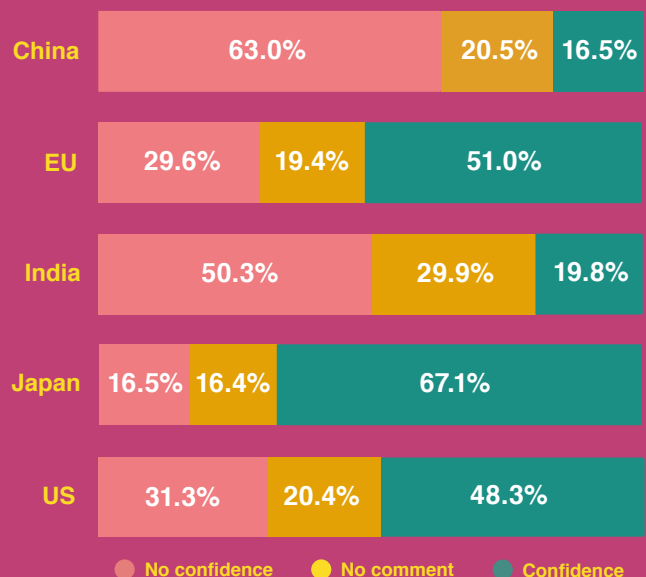
10 ASEAN continues to express concerns over the South China Sea (SCS) situation. 62.4% are concerned about China's militarisation and assertive actions, followed by Chinese encroachments in the exclusive economic zones and continental shelves (59.1%). The third-ranked concern (45.2%) is a US-China military confrontation that may lead to a political crisis. A large majority (84.6%) want ASEAN to adopt a principled stand on the SCS that upholds international law, and 80.8% agree that a code of conduct in the SCS must be aligned with international law.

**Top concerns over the South China Sea**



12 The EU and Japan are the clear front-runners for ASEAN's most favoured and trusted strategic partners in the hedging game against US-China rivalry. Japan (67.1%) remains the most trusted power in the region. The EU comes in second place at 51.0% with many viewing the EU as a reliable champion on issues such as the rule of law, global governance, free trade, sustainability and climate change. In the meantime, the US makes a surprising turn-around with a 18.0% jump in trust ratings while the China trust deficit is trending upwards from 60.4% in 2020 to 63.0% in 2021.

**Trust perceptions towards major powers**

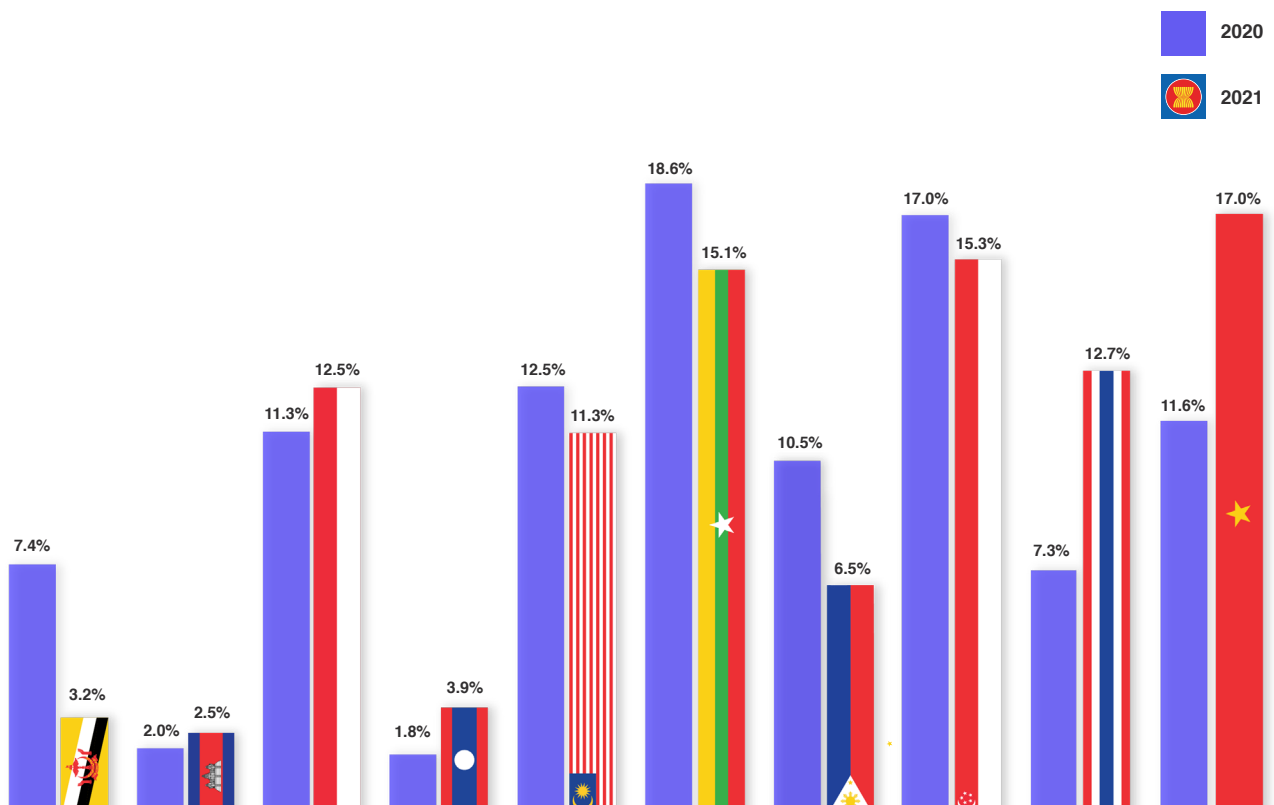


This section features the background of the survey respondents, including their nationality, affiliation and age distribution.

## Nationality

1,032 respondents from ten ASEAN member states participated in the 2021 survey. Vietnam led with the highest number of respondents at 175 (17.0%), followed closely behind by Singapore at 158 (15.3%) and Myanmar at 156 (15.1%). The rest of the countries are Thailand (12.7%), Indonesia (12.5%), Malaysia (11.3%), the Philippines (6.5%), Laos (3.9%), Brunei Darussalam (3.2%) and Cambodia (2.5%).

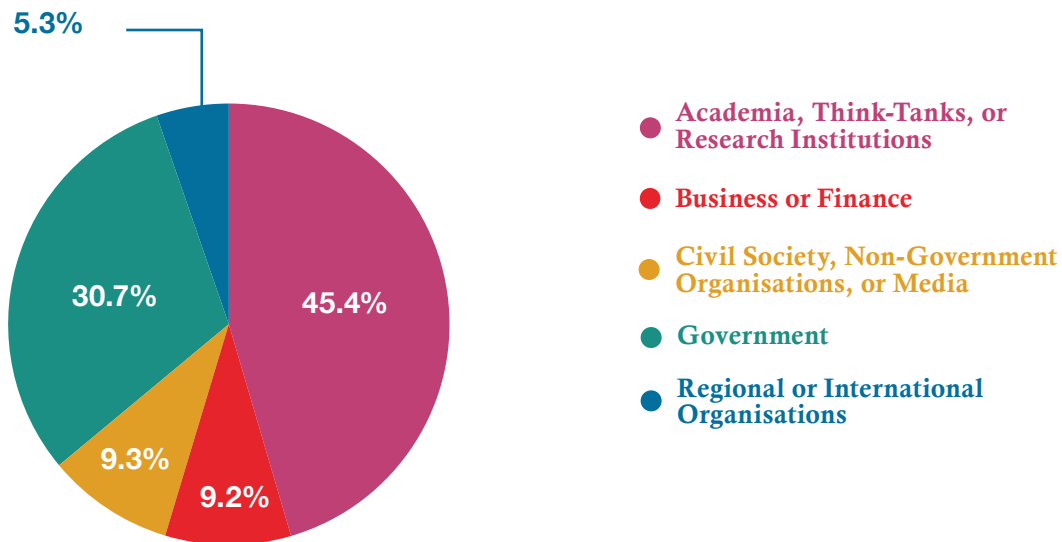
### Q1 What is your nationality?



## Affiliation

The largest group of respondents are from academia, think-tanks or research institutions at 45.4%. Government representation is at 30.7% followed by 9.3% from civil society organisations, non-government organisations or the media. The private sector (business or finance) is represented by 9.2% of the respondents. The smallest representation is from regional or international organisations at 5.3%.

There is a deviation in the affiliation categories compared to the 2020 survey in order to obtain a clearer representation. Regional and international organisations are categorised as one group, separate from government as another group. Civil society actors, including the media, are grouped in a single category this year.



### Q2 What is your affiliation?

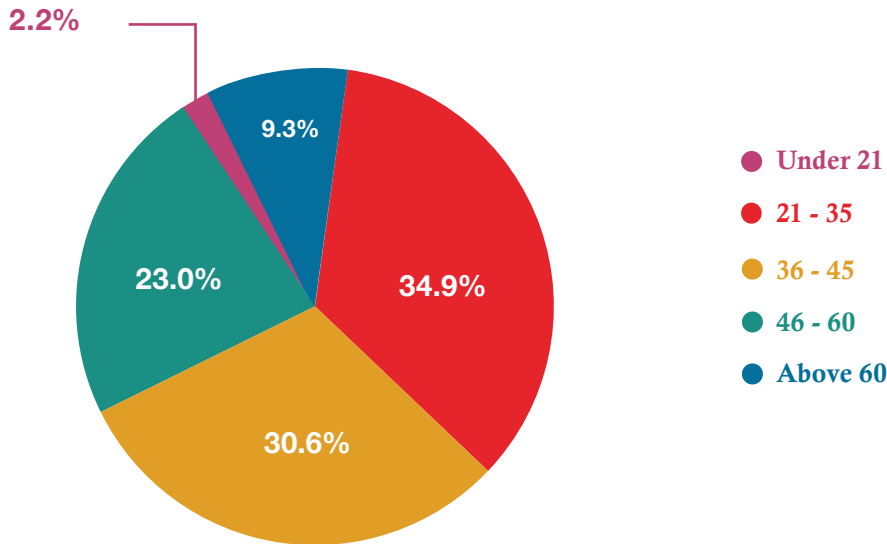
Country	Academia, Think-Tanks, or Research Institutions	Business or Finance	Civil Society, Non-Government Organisations, or Media	Government	Regional or International Organisations
ASEAN	45.4%	9.2%	9.3%	30.7%	5.3%
Brunei	9.1%	9.1%	15.2%	66.7%	0.0%
Cambodia	57.7%	11.5%	7.7%	11.5%	11.5%
Indonesia	68.2%	6.2%	6.2%	7.0%	12.4%
Laos	15.0%	12.5%	2.5%	65.0%	5.0%
Malaysia	64.1%	6.8%	4.3%	20.5%	4.3%
Myanmar	26.3%	2.6%	7.7%	59.0%	4.5%
Philippines	59.7%	1.5%	6.0%	19.4%	13.4%
Singapore	40.5%	20.3%	13.3%	22.8%	3.2%
Thailand	58.8%	11.5%	6.9%	19.1%	3.8%
Vietnam	34.3%	9.1%	16.6%	38.3%	1.7%



## Age

The largest age group among respondents is between 21-35 years old (34.9%). The youngest person in this group would have been born in this millennium while the oldest belongs to the 1980s generation. The second largest group is between 36-45 years old (30.6%).

These two groups are considered the most economically productive and intellectually engaged age groups in ASEAN member states. The third largest group is aged between 46-60 years old (23.0%), followed by those aged 60 and above (9.3%) and those under 21 years old (2.2%).



### Q3 What age group do you belong to?

Country	Under 21	21 - 35	36 - 45	46 - 60	Above 60
ASEAN	2.2%	34.9%	30.6%	23.0%	9.3%
Brunei	3.0%	51.5%	30.3%	12.1%	3.0%
Cambodia	3.8%	50.0%	26.9%	11.5%	7.7%
Indonesia	5.4%	41.1%	25.6%	24.0%	3.9%
Laos	10.0%	55.0%	27.5%	5.0%	2.5%
Malaysia	0.0%	17.9%	29.9%	40.2%	12.0%
Myanmar	0.6%	41.0%	39.1%	12.8%	6.4%
Philippines	1.5%	16.4%	14.9%	47.8%	19.4%
Singapore	0.6%	32.3%	20.3%	29.1%	17.7%
Thailand	4.6%	45.0%	19.8%	16.8%	13.7%
Vietnam	0.6%	28.0%	52.0%	17.1%	2.3%



This section takes the pulse on the region's most pressing preoccupations in the past year, with a focus on the COVID-19 pandemic and government response.

## Top Three Challenges Facing Southeast Asia

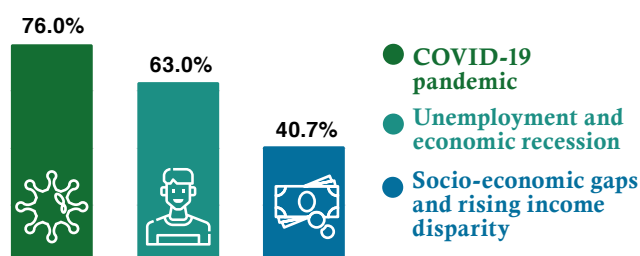
The COVID-19 pandemic has left no one untouched, be it in the experience of the loss of loved ones, job retrenchment, travel restrictions or trade and education disruptions. That sense of uncertainty remains palpable as there are still no signs of abatement of the pandemic with new virus mutations across the world. It is no surprise that the “threat to health from the COVID-19 pandemic” tops the list of challenges facing the region (76.0%).

The anxiety over COVID-19 is felt more strongly among Lao respondents (90.0%), followed by Myanmar (87.8%) and Indonesia (84.5%). The degrees of concern are less pronounced among the respondents from Singapore (63.3%), Thailand (64.9%) and Brunei (69.7%), possibly due to the relatively stable health infrastructure and adequate hospital capacities in these countries as opposed to the weaker health systems in Laos, Myanmar, and Indonesia.

“Unemployment and economic recession” is ranked the second biggest challenge facing the region, chosen by 63.0% of the respondents. In the 2019 and 2020 surveys, “economic downturn” was also picked as No. 2 challenge,

but the concern must have been more palpable with the pandemic's economic impact at the back of respondents' minds.

Coming third in the region's main preoccupations is “widening socio-economic gaps and rising income disparity” (40.7%). This choice may also have been made with pandemic worries top of mind. Meanwhile, traditional issues dominating the list of challenges last year such as domestic political instability, terrorism and increased military tensions have dropped dramatically. “Domestic political instability (including ethnic and religious tensions)” – the top security concern in 2020 at 70.5% – dropped to 5<sup>th</sup> place at 35.1% in 2021.



## Q4 What are the top 3 challenges facing Southeast Asia? (check 3 responses)

Country	Deterioration of human rights conditions	Domestic political instability (including ethnic and religious tensions)	Increased military tensions arising from potential flashpoints (i.e. SCS, Taiwan Strait, Korean Peninsula)	More intense and frequent weather events resulting from climate change (droughts, floods, cyclones, rising sea levels, etc.)	Terrorism	The threat to health from the COVID-19 pandemic	Unemployment and economic recession	Widening socio-economic gaps and rising income disparity
ASEAN	12.6%	35.1%	29.9%	37.5%	5.2%	76.0%	63.0%	40.7%
Brunei	12.1%	12.1%	33.3%	39.4%	9.1%	69.7%	78.8%	45.5%
Cambodia	23.1%	30.8%	30.8%	42.3%	0.0%	76.9%	53.8%	42.3%
Indonesia	15.5%	31.8%	26.4%	29.5%	5.4%	84.5%	67.4%	39.5%
Laos	10.0%	27.5%	7.5%	17.5%	12.5%	90.0%	85.0%	50.0%
Malaysia	16.2%	48.7%	23.9%	22.2%	2.6%	71.8%	70.1%	44.4%
Myanmar	7.1%	45.5%	13.5%	29.5%	9.6%	87.8%	69.9%	37.2%
Philippines	13.4%	11.9%	37.3%	59.7%	3.0%	80.6%	65.7%	28.4%
Singapore	6.3%	36.7%	33.5%	45.6%	7.6%	63.3%	55.1%	51.9%
Thailand	31.3%	52.7%	16.8%	19.8%	3.1%	64.9%	55.0%	56.5%
Vietnam	3.4%	20.0%	59.4%	61.7%	1.7%	77.7%	54.3%	21.7%

Note: For the 2019 and 2020 Surveys, the question posed to respondents was “What are your top 3 concerns for security challenges facing Southeast Asia?” We decided this year to broaden the question to top 3 challenges and presented 8, instead of 5 options.

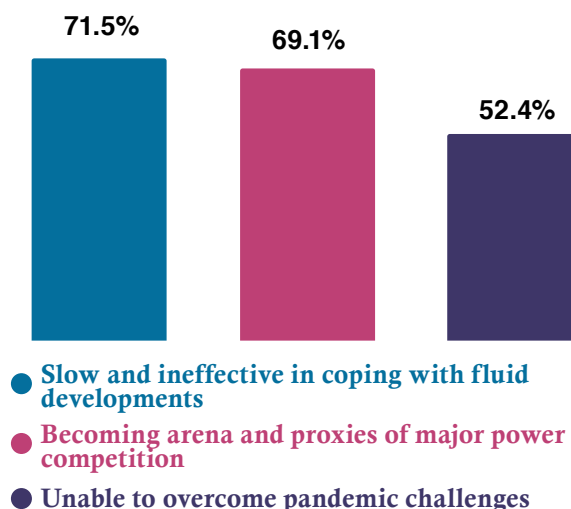
## Top Three Concerns about ASEAN

Two of the top three concerns of Southeast Asians regarding ASEAN remain unchanged this year. 71.5% are of the view that “ASEAN is slow and ineffective, and thus cannot cope with the fluid political and economic developments”. This is an increase from 68.6% of respondents who shared this view last year. This concern about ASEAN is more pronounced in Thailand (77.1%), Myanmar (75.0%) and Singapore (74.7%) than in Indonesia (66.7%), Cambodia (61.5%) and Brunei Darussalam (60.6%).

Even with the pandemic, geo-politics is not far from everyone’s minds. In the second-ranked concern, 69.1% fear that ASEAN is becoming an arena of major power competition and its members may become proxies of a major power, a slight drop from last year’s 73.2%. Brunei Darussalam (87.9%), Cambodia (84.6%) and Vietnam (81.1%) are most concerned with major power competition in ASEAN whereas Thailand (53.4%), Malaysia (59.0%) and Laos (60.0%) are least concerned.

The third-ranked concern is new as it emerged from the COVID-19 pandemic. 52.4% worry that ASEAN is unable

to overcome the current pandemic challenges. Indonesia (72.1%), Laos (67.5%) and Myanmar (66.0%) are most concerned about ASEAN’s inability to overcome the pandemic while Cambodia (34.6%), Brunei Darussalam (36.4%) and Vietnam (38.3%) are least concerned.



## Q5 What are your top 3 concerns about ASEAN?

(check 3 responses)

Country	ASEAN is becoming an arena of major power competition and its member states may become proxies of a major power	ASEAN is becoming increasingly disunited	ASEAN is becoming irrelevant in the new world order	ASEAN is elitist and disconnected from ordinary people	ASEAN is slow and ineffective, and thus cannot cope with fluid political and economic developments	ASEAN is unable to overcome current pandemic challenges
ASEAN	69.1%	46.2%	22.1%	38.7%	71.5%	52.4%
Brunei	87.9%	45.5%	30.3%	39.4%	60.6%	36.4%
Cambodia	84.6%	53.8%	15.4%	50.0%	61.5%	34.6%
Indonesia	62.0%	26.4%	23.3%	49.6%	66.7%	72.1%
Laos	60.0%	37.5%	17.5%	47.5%	70.0%	67.5%
Malaysia	59.0%	44.4%	25.6%	47.9%	69.2%	53.8%
Myanmar	71.2%	26.9%	17.3%	43.6%	75.0%	66.0%
Philippines	76.1%	34.3%	25.4%	40.3%	68.7%	55.2%
Singapore	72.8%	60.8%	24.7%	24.7%	74.7%	42.4%
Thailand	53.4%	52.7%	16.8%	51.9%	77.1%	48.1%
Vietnam	81.1%	66.9%	24.0%	18.3%	71.4%	38.3%

## Assessment of Government Response to COVID-19

The majority of respondents (60.7%) approve of their governments' handling of COVID-19. Respondents from Vietnam (96.6%), Brunei (93.9%) and Singapore (92.4%) give their governments strong approval ratings in COVID-19 response. Brunei, Singapore and Vietnam also record the lowest rates of disapproval at 3.0%, 1.9% and 1.1%. In contrast, Philippine respondents are most disapproving of their government's pandemic response (53.7%), followed by Indonesia (50.4%).

A sizeable percentage of Indonesians (25.6%) are neutral about their government's response. Respondents from Thailand are almost equally split with 44.3% in "approve/strongly approve" versus 36.7% in "disapprove/strongly disapprove" and another 19.1% being neutral. This may be a reflection of the Thais' domestic preoccupation with prolonged pro-democracy demonstrations throughout last year.



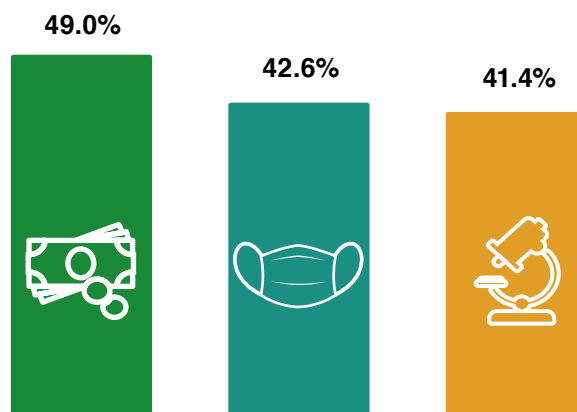
### Q6 What is your assessment of your government's response to COVID-19 thus far?

Country	Strongly approve	Approve	Neutral	Disapprove	Strongly disapprove
ASEAN	28.6%	32.1%	15.1%	17.2%	7.0%
Brunei	72.7%	21.2%	3.0%	0.0%	3.0%
Cambodia	26.9%	53.8%	11.5%	3.8%	3.8%
Indonesia	4.7%	19.4%	25.6%	35.7%	14.7%
Laos	22.5%	32.5%	22.5%	17.5%	5.0%
Malaysia	14.5%	40.2%	17.1%	27.4%	0.9%
Myanmar	5.8%	37.2%	25.0%	23.1%	9.0%
Philippines	6.0%	19.4%	20.9%	35.8%	17.9%
Singapore	43.7%	48.7%	5.7%	1.9%	0.0%
Thailand	13.0%	31.3%	19.1%	21.4%	15.3%
Vietnam	76.0%	20.6%	2.3%	0.0%	1.1%

## Government Policy to Better Address COVID-19

49.0% of respondents across the region think that their governments should “offer better financial relief and subsidies to citizens impacted economically by COVID-19”. 42.6% feel that “politicians and public servants should observe public health measures, instead of flouting them”, and 41.4% suggest that their governments should “invest in early warning systems for pandemic outbreak and R&D for virus testing and vaccine development”.

Brunei and Singapore stand out in their unequivocal support to “encourage more scientists and medical doctors to contribute to public policy discussions and heed their advice” and “invest in early warning systems for pandemic outbreak and R&D for virus testing and vaccine development”, both options at 100.0% respectively. Respondents from Malaysia (69.7%) are most critical of their politicians and public servants in terms of observing public health measures. Meanwhile, 77.1% of Thai respondents feel that subsidies and relief for those suffering economically are needed.



- Offer better financial relief and subsidies to citizens impacted economically by COVID-19
- Politicians and public servants should observe public health measures, instead of flouting them
- Invest in early warning systems for pandemic outbreak and R&D for virus testing and vaccine development

### Q7 What should your government do to better address COVID-19? (check 2 responses)

Answered: 249 (Respondents who chose the “Disapprove” and “Strongly disapprove” options in Q6)

Country	Encourage more scientists and medical doctors to contribute to public policy discussions and heed their advice	Implement public health measures such as social distancing and mask wearing	Invest in early warning systems for pandemic outbreak and R&D for virus testing and vaccine development	Offer better financial relief and subsidies to citizens impacted economically by COVID-19	Politicians and public servants should observe public health measures, instead of flouting them
ASEAN	38.2%	28.9%	41.4%	49.0%	42.6%
Brunei	100.0%	0.0%	100.0%	0.0%	0.0%
Cambodia	50.0%	0.0%	50.0%	50.0%	50.0%
Indonesia	49.2%	30.8%	40.0%	36.9%	43.1%
Laos	66.7%	55.6%	0.0%	33.3%	44.4%
Malaysia	15.2%	30.3%	33.3%	51.5%	69.7%
Myanmar	28.0%	54.0%	26.0%	56.0%	36.0%
Philippines	72.2%	5.6%	58.3%	33.3%	30.6%
Singapore	100.0%	0.0%	100.0%	0.0%	0.0%
Thailand	12.5%	14.6%	52.1%	77.1%	43.8%
Vietnam	50.0%	50.0%	100.0%	0.0%	0.0%

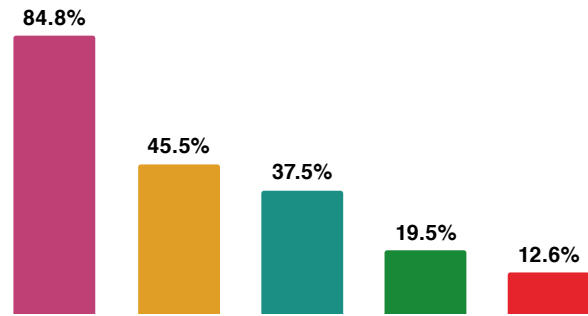
## Approval of Government Response to COVID-19

Overall, the majority of respondents think that their governments have “adequately implemented public health measures to mitigate the pandemic” (84.8%). Respondents from Laos have the highest approval ratings for public health measures (95.5%), followed by Vietnam (93.5%) and Brunei (90.3%).

On economic mitigation measures, only 45.5% feel that their governments have “provided financial relief and support for affected citizens and businesses”. Myanmar respondents feel that their government has provided enough of a safety net for affected citizens and businesses (74.6%), followed by Indonesia (71.0%), Malaysia (64.1%) and Singapore (63.0%). Conversely, fewer respondents from Thailand (17.2%), Laos (13.6%) and Brunei (22.6%) think that their governments have done well in this respect.

Only 37.5% feel that “scientists and medical doctors have contributed to public policy discussions and the public has heeded their advice”, and a small minority (12.6%) think that their governments have “invested in early warning systems and R&D”. These findings confirm that while

ASEAN member governments have done relatively well in their public health response, they will need to do more to be better prepared in the long-term for future outbreaks.



- Adequately implemented public health measures
- Provided financial relief and support
- Scientists and medical doctors contributed to public policy discussions and the public heeded advice
- Politicians and public servants observed public health measures
- Invested in early warning systems and R&D

### Q8 Why do you approve of your government’s response to COVID-19? (check 2 responses)

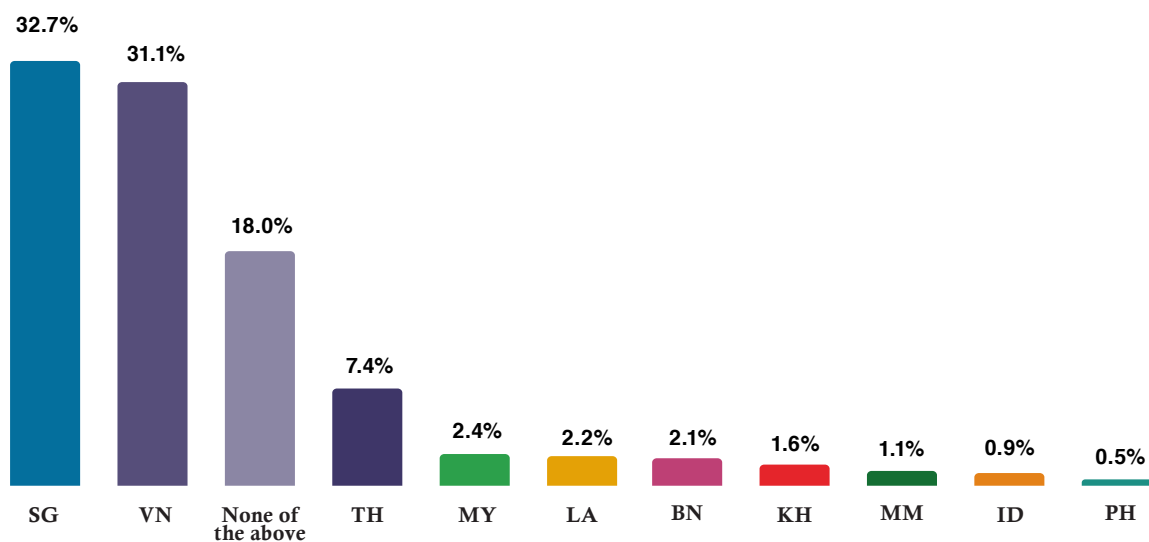
Answered: 626 (Respondents who chose the “Approve” and “Strongly approve” options in Q6)

Country	It has adequately implemented public health measures to mitigate the pandemic	It has invested in early warning systems and R&D in virus testing and vaccine development	It has provided financial relief and support for affected citizens and businesses	Politicians and public servants have observed public health measures	Scientists and medical doctors have contributed to public policy discussions and the public has heeded their advice
ASEAN	84.8%	12.6%	45.5%	19.5%	37.5%
Brunei	90.3%	9.7%	22.6%	29.0%	48.4%
Cambodia	81.0%	0.0%	47.6%	38.1%	33.3%
Indonesia	58.1%	19.4%	71.0%	12.9%	38.7%
Laos	95.5%	9.1%	13.6%	36.4%	45.5%
Malaysia	89.1%	3.1%	64.1%	3.1%	40.6%
Myanmar	64.2%	3.0%	74.6%	38.8%	19.4%
Philippines	76.5%	5.9%	58.8%	5.9%	52.9%
Singapore	87.7%	13.0%	63.0%	8.2%	28.1%
Thailand	82.8%	3.4%	17.2%	20.7%	75.9%
Vietnam	93.5%	24.9%	23.7%	23.7%	34.3%

## Assessment of Best Leadership on COVID-19

32.7% of Southeast Asian respondents pick Singapore as the country that has provided the best leadership to ASEAN while another 31.1% choose Vietnam as the second-best leader. Only 2.3% of Vietnamese respondents pick Singapore while 13.3% of Singaporean respondents feel that Vietnam performs better than their own country.

Of note, 34.3% of Philippine respondents feel that Vietnam has led ASEAN well whereas 44.2% of Indonesian respondents choose Singapore. Across all ten ASEAN member states, only Brunei and Vietnam pick Vietnam for best leadership whereas the other eight members choose Singapore.



### Q9 Which ASEAN country has provided the best leadership to ASEAN on COVID-19?

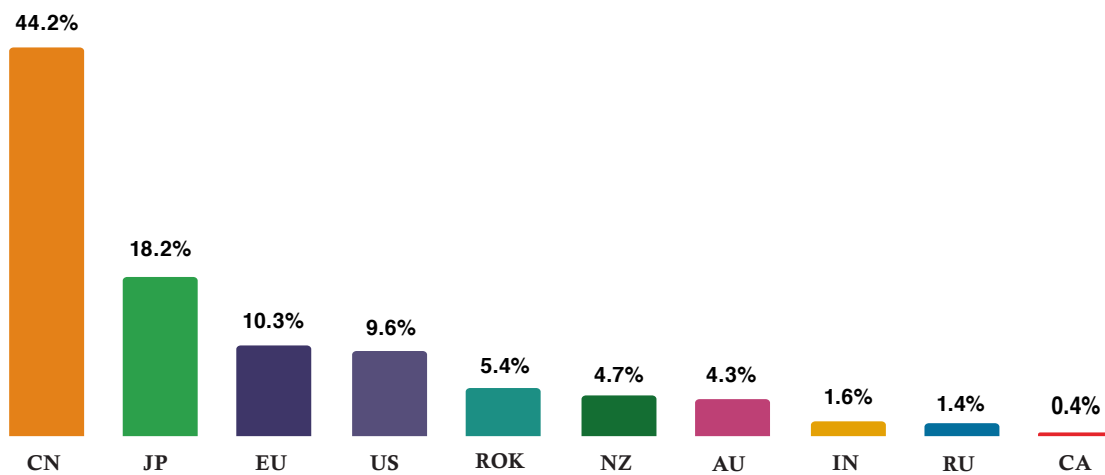
Country	Brunei	Cambodia	Indonesia	Laos	Malaysia	Myanmar	Philippines	Singapore	Thailand	Vietnam	None of the above
ASEAN	2.1%	1.6%	0.9%	2.2%	2.4%	1.1%	0.5%	32.7%	7.4%	31.1%	18.0%
Brunei	48.5%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	9.1%	0.0%	12.1%	30.3%
Cambodia	0.0%	53.8%	0.0%	0.0%	0.0%	0.0%	0.0%	23.1%	0.0%	11.5%	11.5%
Indonesia	0.8%	0.0%	4.7%	0.0%	3.1%	0.8%	0.0%	44.2%	3.1%	29.5%	14.0%
Laos	0.0%	0.0%	2.5%	27.5%	2.5%	0.0%	0.0%	27.5%	2.5%	20.0%	17.5%
Malaysia	0.0%	0.0%	0.0%	0.0%	16.2%	0.0%	0.0%	26.5%	6.8%	15.4%	35.0%
Myanmar	0.6%	1.3%	0.6%	7.1%	0.0%	6.4%	0.6%	41.7%	9.0%	19.2%	13.5%
Philippines	1.5%	0.0%	0.0%	1.5%	1.5%	0.0%	6.0%	37.3%	4.5%	34.3%	13.4%
Singapore	0.6%	0.6%	0.6%	0.0%	0.0%	0.0%	0.0%	51.9%	2.5%	13.3%	30.4%
Thailand	0.8%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	40.5%	31.3%	11.5%	16.0%
Vietnam	0.6%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	2.3%	0.6%	92.0%	4.6%



## Assessment of Dialogue Partners' Assistance on COVID-19

Of ASEAN's ten Dialogue Partners, China is seen as having provided the most help to the region during the pandemic with 44.2% of the respondents picking China, followed by Japan (18.2%) and the EU (10.3%). The highest ratings for China are from Brunei (87.9%), Thailand (65.6%) and Malaysia (64.1%). Myanmar respondents pick Japan as the top choice (41.0%), followed by China (28.8%) while Vietnam's top choice is the US (29.7%), followed

by Japan (29.1%). The EU enjoys the most positive perception from Indonesia (20.2%), followed by Cambodia (19.2%) and the Philippines (16.4%). Interestingly, New Zealand's support is well regarded among Singaporean respondents who choose Wellington as the second best choice (13.9%), after China (55.1%). Vietnam is equally balanced between the US (29.7%) and Japan (29.1%) with China trailing at 13.7%.



### Q10 Which ASEAN's Dialogue Partner has provided the most help to the region for COVID-19?

Country	Australia	Canada	China	India	Japan	New Zealand	Republic of Korea	Russia	The European Union	The United States
ASEAN	4.3%	0.4%	44.2%	1.6%	18.2%	4.7%	5.4%	1.4%	10.3%	9.6%
Brunei	3.0%	0.0%	87.9%	0.0%	3.0%	0.0%	6.1%	0.0%	0.0%	0.0%
Cambodia	11.5%	0.0%	50.0%	0.0%	11.5%	3.8%	3.8%	0.0%	19.2%	0.0%
Indonesia	6.2%	0.0%	45.0%	0.8%	9.3%	3.9%	6.2%	1.6%	20.2%	7.0%
Laos	12.5%	0.0%	62.5%	0.0%	17.5%	0.0%	0.0%	2.5%	5.0%	0.0%
Malaysia	5.1%	0.0%	64.1%	0.0%	10.3%	5.1%	3.4%	0.0%	6.8%	5.1%
Myanmar	1.9%	0.0%	28.8%	7.1%	41.0%	1.3%	4.5%	1.3%	8.3%	5.8%
Philippines	9.0%	3.0%	20.9%	0.0%	11.9%	9.0%	10.4%	3.0%	16.4%	16.4%
Singapore	1.3%	0.0%	55.1%	0.6%	11.4%	13.9%	5.7%	0.6%	7.0%	4.4%
Thailand	1.5%	0.8%	65.6%	0.8%	9.2%	4.6%	6.1%	0.0%	7.6%	3.8%
Vietnam	4.6%	0.6%	13.7%	1.1%	29.1%	0.6%	5.7%	3.4%	11.4%	29.7%



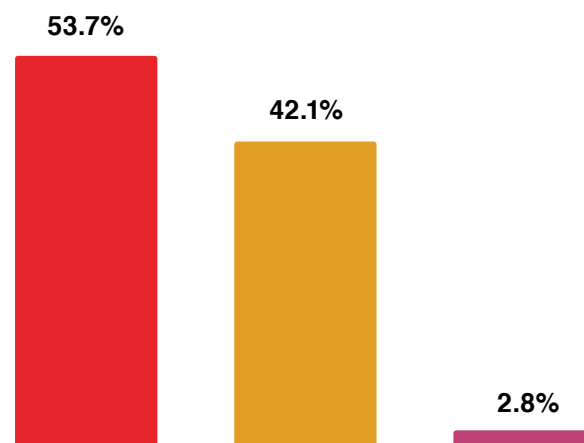
This section highlights current and emerging issues of concern for ASEAN member states including climate change, the South China Sea, and Mekong River agenda.

## Views on Climate Change

Climate change ranked among the top three concerns of the region last year. 53.7% of Southeast Asians view climate change as a “serious and immediate threat to the well-being of their country”, a slight increase from 52.7% last year. The Philippines and Vietnam – two countries worst hit by extreme weather events in 2020, including super typhoons Goni (Rolly) and Vamco – recorded 85.1% and 70.9% in the number of their respondents as opposed to 65.0% and 61.2% last year.

The number of respondents feeling that climate change deserves to be monitored dropped from 44.1% last year to 42.1% this year. The majority of respondents from Brunei Darussalam (78.8%) and Myanmar (57.1%) subscribe to this view, reflecting that their priorities are not on the climate *per se*.

The number of climate change deniers has increased slightly from 3.2% last year to 4.3% this year. These respondents share the views that (1) climate change “is a long-term challenge and will not impact me in my lifetime” (2.8%); (2) “there is no scientific basis for climate change and we cannot do anything about it” (1.0%); or (3) “it is not a threat to me or my country” (0.5%).



- It is a serious and immediate threat to the well-being of my country
- It is an important issue that deserves to be monitored
- It is a long-term challenge and will not impact me in my lifetime

## Q11 What is your view of climate change?

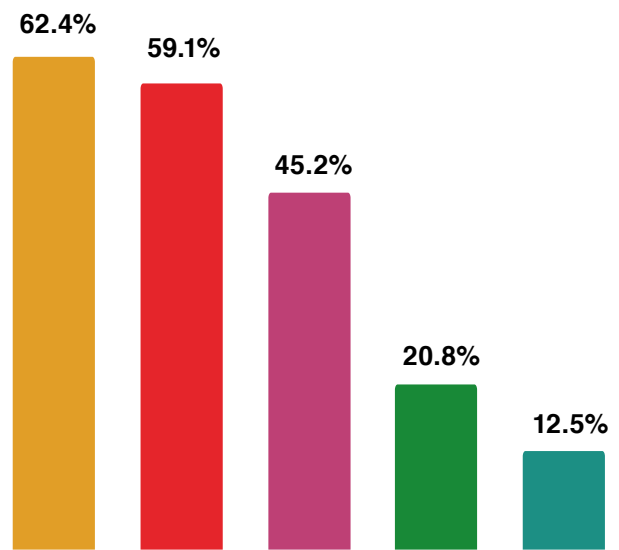
Country	It is a serious and immediate threat to the well-being of my country		It is an important issue that deserves to be monitored		It is a long-term challenge and will not impact me in my lifetime		There is no scientific basis for climate change and we cannot do anything about it		It is not a threat to me or my country	
	2020	2021	2020	2021	2020	2021	2020	2021	2020	2021
ASEAN	52.7%	53.7%	44.1%	42.1%	1.6%	2.8%	0.9%	1.0%	0.7%	0.5%
Brunei	26.8%	18.2%	71.2%	78.8%	1.0%	3.0%	1.0%	0.0%	0.0%	0.0%
Cambodia	57.7%	50.0%	42.3%	50.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Indonesia	71.0%	58.9%	25.7%	37.2%	0.7%	1.6%	1.3%	1.6%	1.3%	0.8%
Laos	60.9%	40.0%	26.1%	50.0%	0.0%	10.0%	4.3%	0.0%	8.7%	0.0%
Malaysia	45.4%	47.0%	50.9%	49.6%	3.1%	0.9%	0.6%	0.9%	0.0%	1.7%
Myanmar	45.5%	38.5%	47.1%	57.1%	2.9%	3.2%	2.9%	0.6%	1.6%	0.6%
Philippines	65.0%	85.1%	33.6%	7.5%	1.4%	3.0%	0.0%	4.5%	0.0%	0.0%
Singapore	49.6%	52.5%	48.6%	44.9%	1.8%	1.3%	0.0%	0.6%	0.0%	0.6%
Thailand	54.2%	48.9%	44.8%	47.3%	0.0%	2.3%	0.0%	1.5%	1.0%	0.0%
Vietnam	61.2%	70.9%	38.2%	24.0%	0.6%	5.1%	0.0%	0.0%	0.0%	0.0%

## Concerns over the South China Sea (SCS) Situation

China's militarisation and assertive actions in the SCS are the top concern for the region (62.4%), followed by Chinese encroachments in the exclusive economic zones and continental shelves of other littoral states (59.1%). The worry over Beijing's maritime encroachments is felt more keenly among the Southeast Asian claimant states, namely the Philippines (86.6%), Vietnam (84.6%), Brunei (63.6%), and Malaysia (63.2%).

The third biggest concern across the region is a US-China military confrontation in the SCS that may lead to a political crisis (45.2%). It is the top concern for 80.8% of Cambodian respondents whereas only 16.6% of Vietnamese respondents share this view.

Only 12.5% of the respondents register their worry over the US' increased military presence in the area. This concern is more pronounced in Laos (37.5%), Cambodia (30.8%) and Brunei (24.2%) while Singapore (6.3%), Vietnam (4.6%) and the Philippines (4.5%) have little qualms about it.



- China's militarisation and assertive actions
- China's encroachments on other littoral states' maritime zones
- US-China military confrontation
- Fish stock depletion & biodiversity loss
- US' increased military presence

### Q12 What are your top concerns over the South China Sea (SCS) situation? (check 2 responses)

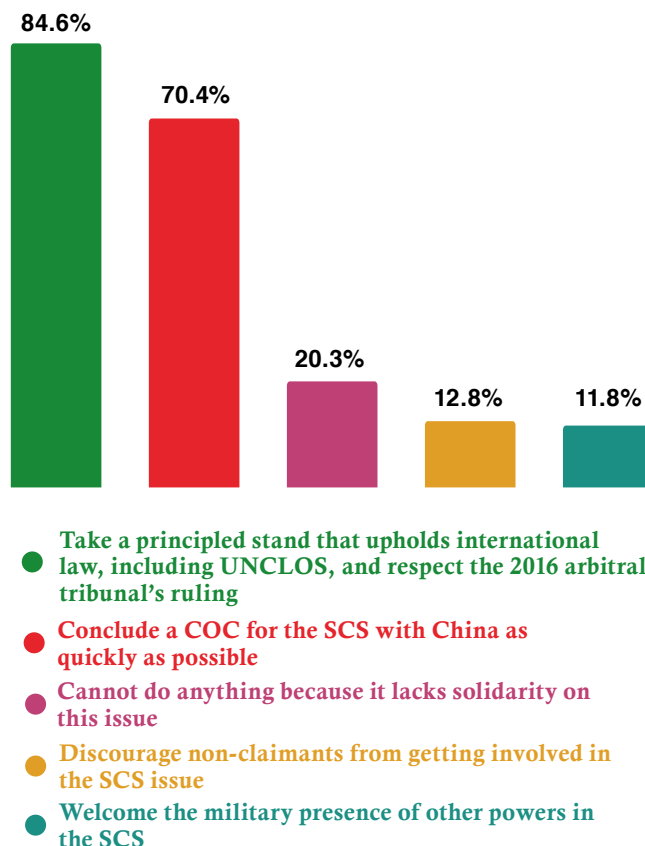
Country	A military confrontation between the US and China that results in a political crisis	China's encroachments in the exclusive economic zones and continental shelves of other littoral states	China's militarisation and assertive actions in the SCS	Depletion of fish stocks and loss of biodiversity	The US' increased military presence in the SCS
ASEAN	45.2%	59.1%	62.4%	20.8%	12.5%
Brunei	48.5%	63.6%	48.5%	15.2%	24.2%
Cambodia	80.8%	30.8%	46.2%	11.5%	30.8%
Indonesia	47.3%	60.5%	57.4%	24.8%	10.1%
Laos	57.5%	32.5%	45.0%	27.5%	37.5%
Malaysia	45.3%	63.2%	48.7%	31.6%	11.1%
Myanmar	59.0%	39.1%	60.9%	18.6%	22.4%
Philippines	16.4%	86.6%	71.6%	20.9%	4.5%
Singapore	59.5%	44.9%	65.8%	23.4%	6.3%
Thailand	50.4%	59.5%	66.4%	11.5%	12.2%
Vietnam	16.6%	84.6%	76.0%	18.3%	4.6%

## ASEAN's Preferred Response to the SCS Situation

Most of the respondents think that ASEAN should adopt a positive and proactive approach to the SCS situation. 84.6% agree that ASEAN should “take a principled stand that upholds international law, including UNCLOS and respect for the 2016 arbitral tribunal’s ruling”, and 70.4% urge ASEAN to conclude a code of conduct (COC) for the SCS with China as early as possible.

The ‘do-nothing’ option is supported by only 20.3% of the respondents. Except for Vietnam, mainland Southeast Asian states – Laos (47.5%), Cambodia (34.6%), Thailand (30.5%) and Myanmar (28.2%) – are more inclined to a fatalistic ‘do-nothing’ approach due to ASEAN’s lack of solidarity. Meanwhile, fewer respondents subscribe to this option in maritime Southeast Asian states that have higher stakes in the SCS: The Philippines (10.4%), Vietnam (12.6%), Singapore (13.9%), Indonesia (14.0%), Brunei (15.2%) and Malaysia (20.5%).

The respondents are quite split on the involvement of external powers in the SCS issue. 12.8% think that ASEAN should discourage non-claimants’ involvement while 11.8% welcome other powers’ military presence in the SCS. Vietnam and Singapore are more forward-leaning on the military presence of external powers. Conversely, Cambodia and Laos are most wary of non-claimants’ involvement.



### Q13 How should ASEAN respond to the SCS situation?

(check 2 responses)

Country	ASEAN cannot do anything because it lacks solidarity on this issue	ASEAN should conclude a Code of Conduct (COC) for the SCS with China as quickly as possible	ASEAN should discourage non-claimants from getting involved in the SCS issue	ASEAN should take a principled stand that upholds international law, including UNCLOS, and respect the 2016 arbitral tribunal's ruling	ASEAN should welcome the military presence of other powers in the SCS
ASEAN	20.3%	70.4%	12.8%	84.6%	11.8%
Brunei	15.2%	69.7%	9.1%	90.9%	15.2%
Cambodia	34.6%	73.1%	42.3%	42.3%	7.7%
Indonesia	14.0%	76.0%	15.5%	90.7%	3.9%
Laos	47.5%	50.0%	30.0%	60.0%	12.5%
Malaysia	20.5%	69.2%	17.9%	83.8%	8.5%
Myanmar	28.2%	71.8%	13.5%	79.5%	7.1%
Philippines	10.4%	70.1%	6.0%	100.0%	13.4%
Singapore	13.9%	74.1%	7.6%	88.0%	16.5%
Thailand	30.5%	67.2%	16.8%	78.6%	6.9%
Vietnam	12.6%	69.7%	3.4%	91.4%	22.9%

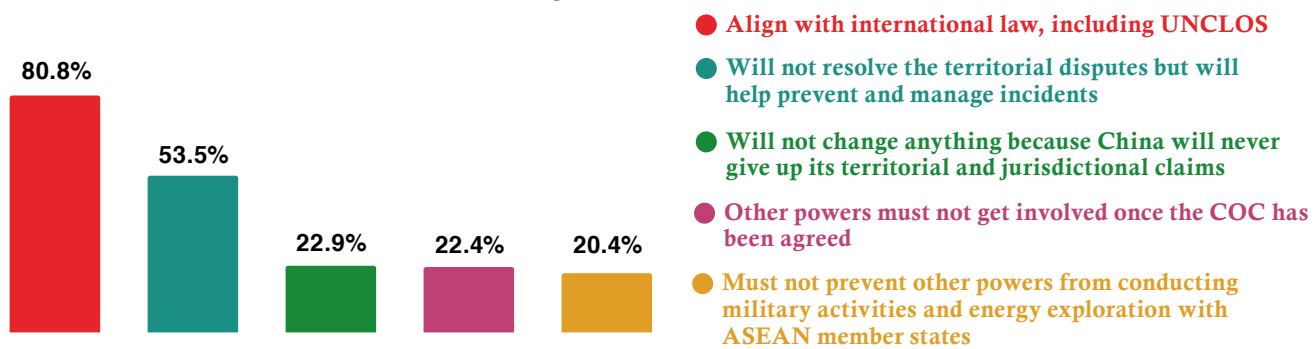
## Proposal on the Future Code of Conduct (COC)

The majority of respondents favour a rules-based approach towards a future COC. 80.8% agree that the COC must be aligned with international law, including UNCLOS. 53.5% do not expect the COC to resolve the territorial disputes but hope that it will help prevent and manage incidents in the SCS. 22.9% of the respondents are more pessimistic as they subscribe to the view that “the COC will not change anything because China will never give up its territorial and jurisdictional claims based on the Nine-Dash Line”.

While the respondents across the region almost unanimously uphold the primacy of international law in the formulation of the COC, they are again split on the involvement of other powers in the process. Overall, 22.4% agree that “other powers must not get involved in the SCS issue once ASEAN and China have reached agreement

on the COC.” 40.0% of Lao respondents subscribe to this view, followed by Indonesia (37.2%), Myanmar (31.4%), Cambodia (26.9%), Malaysia (25.6%), Thailand (22.9%), the Philippines (22.4%) whereas few in Vietnam (5.7%), Singapore (12.7%) and Brunei (18.2%) are interested in this proposition.

Likewise, more respondents from Vietnam (30.9%), Brunei (30.3%) and Singapore (20.9%) agree that “the COC must not prevent other powers from conducting military activities and energy exploration with ASEAN member states in the SCS.” Conversely, only 11.5% of the respondents from Cambodia support this statement, followed by Indonesia (12.4%), Malaysia (15.4%), Thailand (16.8%), Laos (17.5%) and the Philippines (17.9%).

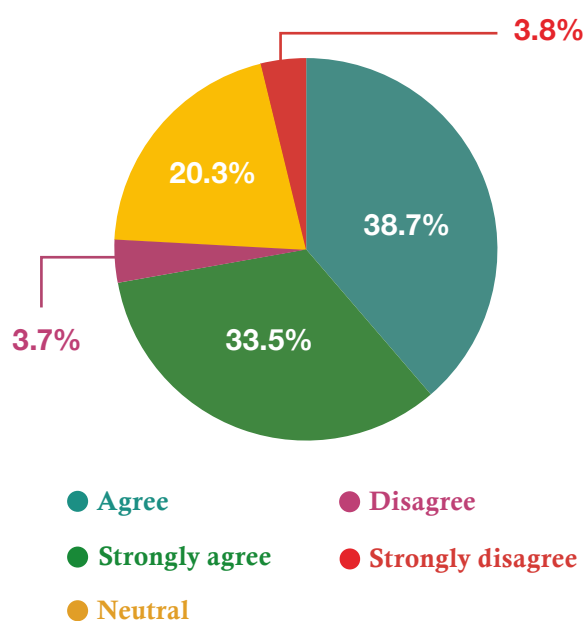


### Q14 Which of the following statements on the future Code of Conduct (COC) do you agree with? (check 2 responses)

Country	Other powers must not get involved in the SCS issue once ASEAN and China have reached agreement on the COC	The COC must be aligned with international law, including UNCLOS	The COC must not prevent other powers from conducting military activities and energy exploration with ASEAN member states in the SCS	The COC will not change anything because China will never give up its territorial and jurisdictional claims based on the Nine-Dash Line	The COC will not resolve the territorial disputes but will help prevent and manage incidents in the SCS
ASEAN	22.4%	80.8%	20.4%	22.9%	53.5%
Brunei	18.2%	81.8%	30.3%	18.2%	51.5%
Cambodia	26.9%	76.9%	11.5%	15.4%	69.2%
Indonesia	37.2%	79.8%	12.4%	24.8%	45.7%
Laos	40.0%	82.5%	17.5%	25.0%	35.0%
Malaysia	25.6%	71.8%	15.4%	23.9%	63.2%
Myanmar	31.4%	76.9%	23.1%	21.8%	46.8%
Philippines	22.4%	97.0%	17.9%	10.4%	52.2%
Singapore	12.7%	84.2%	20.9%	25.3%	57.0%
Thailand	22.9%	72.5%	16.8%	26.7%	61.1%
Vietnam	5.7%	88.0%	30.9%	22.9%	52.6%

## Views on Mekong River Issues

The majority of respondents (72.2%) agree or strongly agree that “ASEAN should include Mekong River issues in its agenda”. The preference for ASEAN to pay greater attention to the Mekong River is most pronounced in its downstream riparian states, namely Vietnam (92.6%), Thailand (87.8%) and Cambodia (73.0%). Interestingly, respondents from some maritime Southeast Asian states, i.e. Singapore (74.0%), Malaysia (67.5%) and the Philippines (67.2%), exhibit even greater regional interest in Mekong issues than those from Laos (65.0%) and Myanmar (61.6%). 20.3% of the respondents across the region maintain a neutral position on this issue. The ‘neutral’ option is the most preferred one in Brunei (51.5%), followed by Indonesia (38.0%).

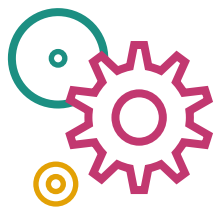


### Q15 Do you agree that ASEAN should include Mekong River issues in its agenda?

Country	Strongly agree	Agree	Neutral	Strongly disagree	Disagree
ASEAN	33.5%	38.7%	20.3%	3.8%	3.7%
Brunei	12.1%	30.3%	51.5%	6.1%	0.0%
Cambodia	53.8%	19.2%	11.5%	7.7%	7.7%
Indonesia	11.6%	44.2%	38.0%	2.3%	3.9%
Laos	35.0%	30.0%	22.5%	7.5%	5.0%
Malaysia	26.5%	41.0%	27.4%	2.6%	2.6%
Myanmar	13.5%	48.1%	23.1%	6.4%	9.0%
Philippines	20.9%	46.3%	23.9%	4.5%	4.5%
Singapore	27.8%	46.2%	19.0%	2.5%	4.4%
Thailand	61.8%	26.0%	6.1%	4.6%	1.5%
Vietnam	61.7%	30.9%	5.7%	1.7%	0.0%

## Views on Mekong River Issues

Only 7.5% of the respondents disagree or strongly disagree to discuss Mekong River issues on ASEAN’s agenda. 66.2% of the respondents in this group argue that these issues “should be best addressed through existing sub-regional mechanisms”; 19.5% worry that “discussing Mekong issues will further increase disunity within ASEAN”; and 14.3% are resigned to the belief that “China has a dominant influence and leverage in the Mekong region, and there is nothing ASEAN can do about it”.



**66.2%**

Mekong issues should be best addressed through existing sub-regional mechanisms.

Among the respondents who want ASEAN to step up its involvement in Mekong River issues, 46.3% have environmental problems and their impact on regional food security in mind. Geo-political considerations also come close as 32.9% consider the Mekong as a geo-political space where ASEAN should play a more active role, and 20.8% worry that ASEAN’s relevance and credibility in mainland Southeast Asia will be undermined if it fails to do so.



**46.3%**

Environmental problems in the Mekong will impact food security and are too important for ASEAN to ignore

### Q16 Why do you disagree with the previous statement?

Answered: 77 (Respondents who chose the “Disagree” and “Strongly disagree” options in Q15)

Country	China has a dominant influence and leverage in the Mekong region, and there is nothing ASEAN can do about it	Discussing Mekong issues will further increase disunity within ASEAN	Mekong issues should be best addressed through existing sub-regional mechanisms
ASEAN	14.3%	19.5%	66.2%
Brunei	0.0%	0.0%	100.0%
Cambodia	0.0%	25.0%	75.0%
Indonesia	0.0%	37.5%	62.5%
Laos	20.0%	40.0%	40.0%
Malaysia	50.0%	0.0%	50.0%
Myanmar	8.3%	20.8%	70.8%
Philippines	16.7%	16.7%	66.7%
Singapore	0.0%	18.2%	81.8%
Thailand	25.0%	12.5%	62.5%
Vietnam	66.7%	0.0%	33.3%

### Q17 Why do you agree with the previous statement?

Answered: 745 (Respondents who chose the “Agree” and “Strongly agree” options in Q15)

Country	ASEAN should treat the Mekong as a geo-political space and play a more active role	ASEAN will lose its relevance and credibility in mainland Southeast Asia if it does not pay due attention to Mekong issues	Environmental problems in the Mekong will impact food security and are too important for ASEAN to ignore
ASEAN	32.9%	20.8%	46.3%
Brunei	64.3%	14.3%	21.4%
Cambodia	21.1%	21.1%	57.9%
Indonesia	37.5%	18.1%	44.4%
Laos	19.2%	11.5%	69.2%
Malaysia	25.3%	21.5%	53.2%
Myanmar	43.8%	24.0%	32.3%
Philippines	24.4%	26.7%	48.9%
Singapore	35.9%	22.2%	41.9%
Thailand	33.9%	24.3%	41.7%
Vietnam	28.4%	16.7%	54.9%

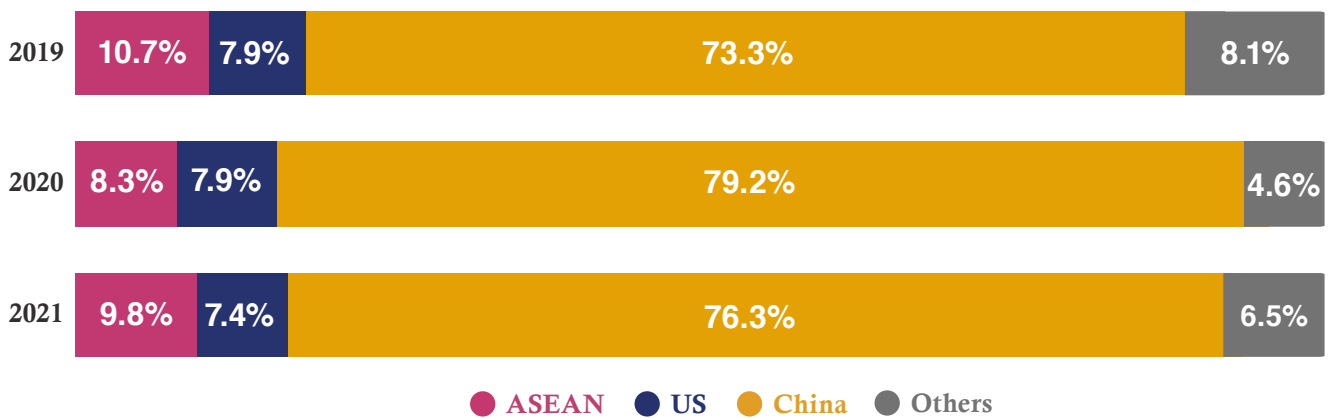


This section seeks views on the influence of major powers in the region and their leadership credibility on global issues such as free trade and international law.

## Most Influential Economic Power in Southeast Asia

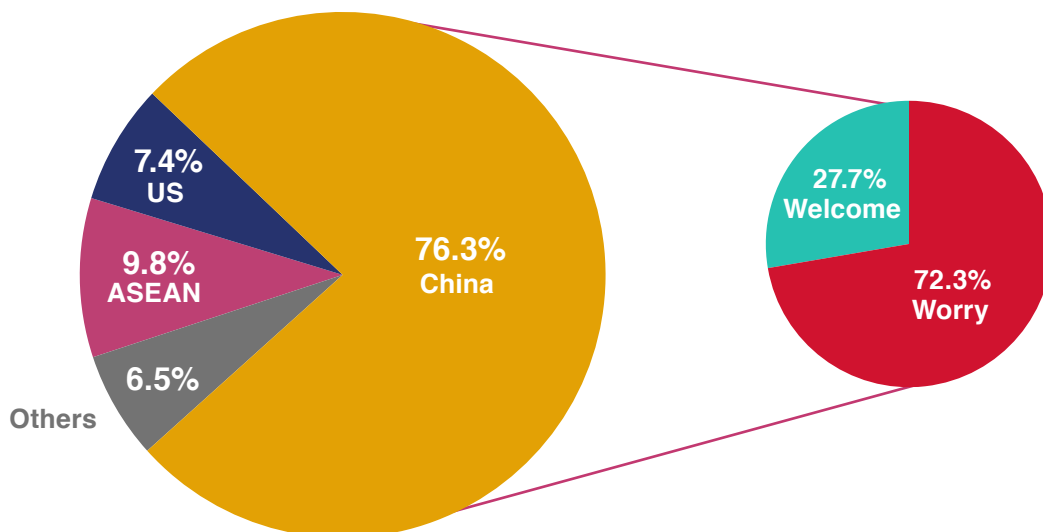
China is overwhelmingly regarded as the most influential economic power by 76.3% of the respondents – a trend that consistently holds since 2019 (73.3%) through 2020 (79.2%) to 2021. The highest levels of recognition of China’s economic influence are registered among

respondents from Laos (87.5%), Thailand (84.7%), Singapore (83.5%), Myanmar (83.3%) and Cambodia (80.8%). The Philippines and Vietnam hold the trend of being less reckoned with China’s economic influence with 59.7% and 65.7% respectively.



Another consistent trend is the region’s anxiety over China’s economic heft. Among those who see China as the most influential economic power, 72.3% are “worried about its growing regional economic influence”. Similar to the 2020 findings, the concern is most pronounced in Vietnam (90.4%), Thailand (79.3%) and the Philippines (77.5%). Conversely, Cambodia and Laos are the least concerned with 52.4% and 51.4% of their respective respondents welcoming China’s economic influence.

ASEAN (9.8%) and the US (7.4%) continue to occupy the second and third spots in the region’s economic pecking order. The vote share of ASEAN inched up from 8.3% in 2020 whereas the US slightly went down from 7.9%. Unlike China, most of the respondents in the region welcome the economic influence of ASEAN (79.2%) and the US (75.0%), largely mirroring the results of the 2020 survey.





## Q18 Which country/regional organisation is the most influential economic power in Southeast Asia?

Country	ASEAN		Australia		China		India		Japan		Republic of Korea		The European Union		The United States	
	2020	2021	2020	2021	2020	2021	2020	2021	2020	2021	2020	2021	2020	2021	2020	2021
ASEAN	8.3%	9.8%	N.A	0.3%	79.2%	76.3%	0.1%	0.1%	3.9%	4.4%	N.A	0.6%	0.6%	1.3%	7.9%	7.4%
Brunei	9.3%	24.2%	N.A	0.0%	85.5%	66.7%	0.0%	0.0%	2.1%	3.0%	N.A	3.0%	1.0%	0.0%	2.1%	3.0%
Cambodia	7.7%	3.8%	N.A	3.8%	88.5%	80.8%	0.0%	0.0%	0.0%	0.0%	N.A	0.0%	3.8%	7.7%	0.0%	3.8%
Indonesia	10.8%	13.2%	N.A	0.0%	77.0%	70.5%	0.0%	0.0%	4.8%	6.2%	N.A	1.6%	0.0%	2.3%	7.4%	6.2%
Laos	17.4%	2.5%	N.A	0.0%	78.3%	87.5%	0.0%	0.0%	0.0%	0.0%	N.A	5.0%	0.0%	0.0%	4.3%	5.0%
Malaysia	11.7%	9.4%	N.A	0.9%	78.5%	76.9%	0.0%	0.0%	2.5%	3.4%	N.A	0.0%	0.6%	2.6%	6.7%	6.8%
Myanmar	4.9%	5.8%	N.A	0.0%	84.9%	83.3%	0.0%	0.0%	5.3%	5.1%	N.A	0.0%	0.8%	1.3%	4.1%	4.5%
Philippines	13.1%	14.9%	N.A	0.0%	61.3%	59.7%	0.7%	0.0%	8.8%	13.4%	N.A	0.0%	0.0%	1.5%	16.1%	10.4%
Singapore	5.0%	5.7%	N.A	0.0%	81.1%	83.5%	0.0%	0.6%	2.7%	2.5%	N.A	0.0%	0.4%	0.6%	10.8%	7.0%
Thailand	4.2%	4.6%	N.A	0.8%	86.5%	84.7%	0.0%	0.0%	3.1%	3.8%	N.A	0.0%	1.0%	0.8%	5.2%	5.3%
Vietnam	8.6%	16.6%	N.A	0.0%	76.3%	65.7%	0.0%	0.0%	2.6%	3.4%	N.A	0.6%	0.7%	0.0%	11.8%	13.7%

Note: Australia and the Republic of Korea are added as new options and Russia is removed in the 2021 survey.

## Q19 What is your view of this economic power's influence on your country?

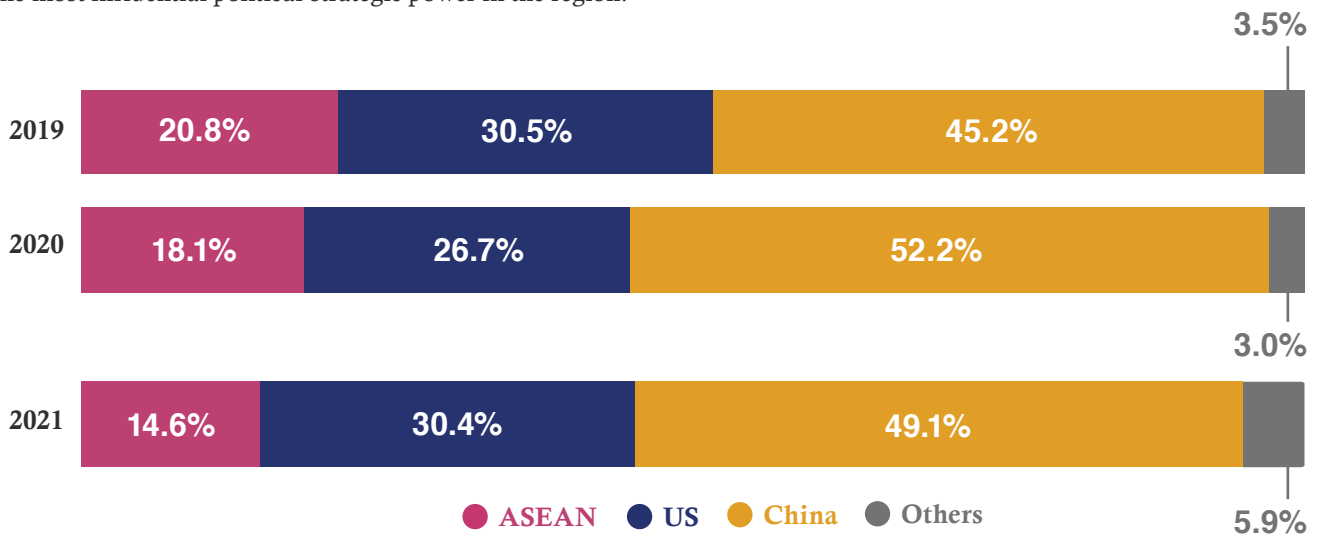
Answered: 101 (Respondents who chose the "ASEAN" option in Q18), 787 (Respondents who chose the "China" option in Q18), 76 (Respondents who chose "The US" option in Q18)

Country	ASEAN				China				The United States			
	I am worried about its growing regional economic influence		I welcome its growing regional economic influence		I am worried about its growing regional economic influence		I welcome its growing regional economic influence		I am worried about its growing regional economic influence		I welcome its growing regional economic influence	
	2020	2021	2020	2021	2020	2021	2020	2021	2020	2021	2020	2021
ASEAN	15.7%	20.8%	84.3%	79.2%	71.9%	72.3%	28.1%	27.7%	29.8%	25.0%	70.2%	75.0%
Brunei	11.1%	12.5%	88.9%	87.5%	62.7%	63.6%	37.3%	36.4%	50.0%	0.0%	50.0%	100.0%
Cambodia	50.0%	0.0%	50.0%	100.0%	56.5%	47.6%	43.5%	52.4%	0.0%	0.0%	0.0%	100.0%
Indonesia	0.0%	0.0%	100.0%	100.0%	61.4%	65.9%	38.6%	34.1%	36.4%	50.0%	63.6%	50.0%
Laos	75.0%	0.0%	25.0%	100.0%	66.7%	48.6%	33.3%	51.4%	100.0%	50.0%	0.0%	50.0%
Malaysia	5.3%	9.1%	94.7%	90.9%	67.2%	63.3%	32.8%	36.7%	27.3%	25.0%	72.7%	75.0%
Myanmar	41.7%	22.2%	58.3%	77.8%	73.9%	76.9%	26.1%	23.1%	30.0%	42.9%	70.0%	57.1%
Philippines	16.7%	20.0%	83.3%	80.0%	82.1%	77.5%	17.9%	22.5%	36.4%	14.3%	63.6%	85.7%
Singapore	0.0%	22.2%	100.0%	77.8%	74.4%	66.7%	25.6%	33.3%	20.8%	36.4%	79.2%	63.6%
Thailand	0.0%	33.3%	100.0%	66.7%	75.9%	79.3%	24.1%	20.7%	40.0%	14.3%	60.0%	85.7%
Vietnam	23.1%	37.9%	76.9%	62.1%	80.2%	90.4%	19.8%	9.6%	22.2%	12.5%	77.8%	87.5%

# Most Influential Political and Strategic Power in Southeast Asia

China continues to be seen as the most influential political-strategic power in the region although its percentage share dipped from 52.2% in 2020 to 49.1% in 2021. China's political-strategic influence is felt more keenly in mainland Southeast Asia – Laos (65.0%), Cambodia (61.5%), Thailand (58.8%) and Myanmar (51.9%) – than in maritime states. The Philippines continues to be the only country that chooses the US (38.8%) over China (29.9%) as the most influential political-strategic power in the region.

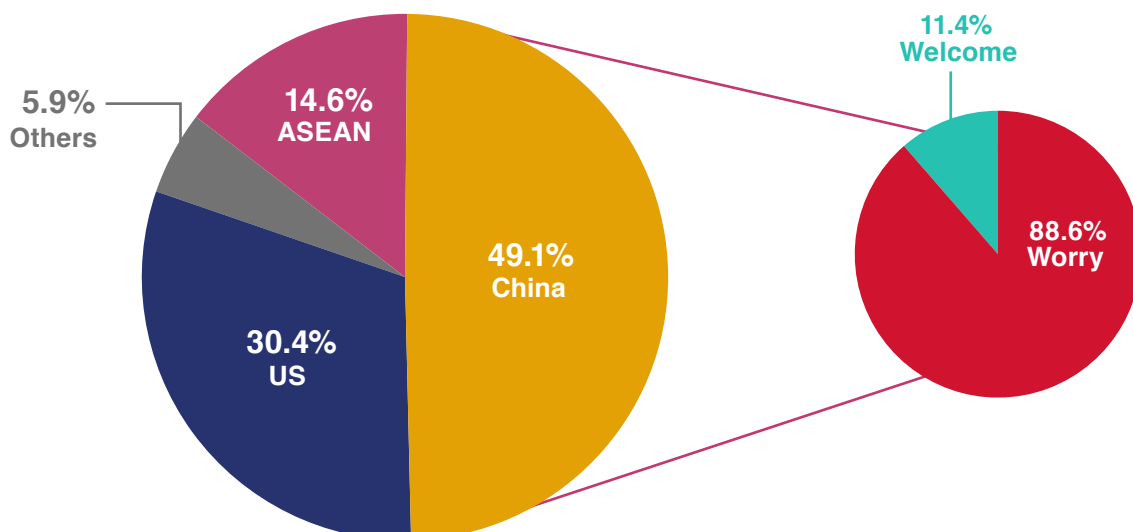
The region's anxiety over Beijing's growing strategic clout has not eased, but increased to 88.6% from 85.4% last year. This anxiety is as pronounced in the mainland as in maritime Southeast Asia with the highest levels found in Vietnam (97.7%), followed by the Philippines (95.0%), Thailand (92.2%), Myanmar (91.4%) and Singapore (87.1%).



The US trails behind China in terms of perceived political-strategic influence in the region but its vote share increased to 30.4% from 26.7% last year. ASEAN ranks third with its vote share being 14.6%, down from 18.1% in 2020, but still well ahead of Japan (3.2%) and the EU (1.7%).

natural that the US has suffered a deepening trust deficit globally. However, the region curiously bucks this trend. The number of respondents who welcome Washington's regional strategic clout increased markedly from 52.7% in 2020 to 63.1% this year. Laos (0.0%) and Cambodia (28.6%) are the least supportive of American influence while Vietnam (91.7%) and Singapore (84.8%) are the most receptive.

After going through a tumultuous 2020 with the out-of-control COVID-19 pandemic, racial violence, economic depression and even political turbulence, it is only



## Q20 Which country/regional organisation has the most political and strategic influence in Southeast Asia?

Country	ASEAN		Australia		China		India		Japan		Republic of Korea		The European Union		The United States	
	2020	2021	2020	2021	2020	2021	2020	2021	2020	2021	2020	2021	2020	2021	2020	2021
ASEAN	18.1%	14.6%	N.A	0.4%	52.2%	49.1%	0.0%	0.2%	1.8%	3.2%	N.A	0.3%	1.1%	1.7%	26.7%	30.4%
Brunei	32.0%	21.2%	N.A	3.0%	49.5%	42.4%	0.0%	0.0%	1.0%	0.0%	N.A	3.0%	2.1%	3.0%	15.4%	27.3%
Cambodia	11.5%	11.5%	N.A	0.0%	57.7%	61.5%	0.0%	0.0%	0.0%	0.0%	N.A	0.0%	3.9%	0.0%	26.9%	26.9%
Indonesia	23.0%	20.2%	N.A	0.0%	40.6%	44.2%	0.0%	0.0%	2.0%	5.4%	N.A	0.0%	2.0%	1.6%	32.4%	28.7%
Laos	17.4%	12.5%	N.A	0.0%	65.2%	65.0%	0.0%	0.0%	13.0%	12.5%	N.A	2.5%	0.0%	0.0%	0.0%	7.5%
Malaysia	17.8%	16.2%	N.A	0.9%	54.6%	50.4%	0.0%	0.0%	1.2%	2.6%	N.A	0.0%	0.6%	0.9%	25.8%	29.1%
Myanmar	15.2%	12.2%	N.A	0.6%	63.5%	51.9%	0.0%	1.3%	1.6%	7.1%	N.A	0.6%	2.5%	4.5%	16.8%	21.8%
Philippines	22.6%	22.4%	N.A	0.0%	35.8%	29.9%	0.0%	0.0%	3.6%	4.5%	N.A	0.0%	0.0%	4.5%	38.0%	38.8%
Singapore	14.4%	10.8%	N.A	0.6%	51.8%	44.3%	0.0%	0.0%	0.9%	1.9%	N.A	0.0%	0.0%	0.6%	32.9%	41.8%
Thailand	15.7%	9.9%	N.A	0.0%	53.1%	58.8%	0.0%	0.0%	1.0%	0.8%	N.A	0.0%	1.0%	1.5%	29.2%	29.0%
Vietnam	13.8%	15.4%	N.A	0.0%	56.6%	49.7%	0.0%	0.0%	1.3%	0.0%	N.A	0.0%	0.0%	0.6%	28.3%	34.3%

Note: Australia and the Republic of Korea are added as new options and Russia is removed in the 2021 survey.

## Q21 What is your view of this power's political and strategic influence on your country?

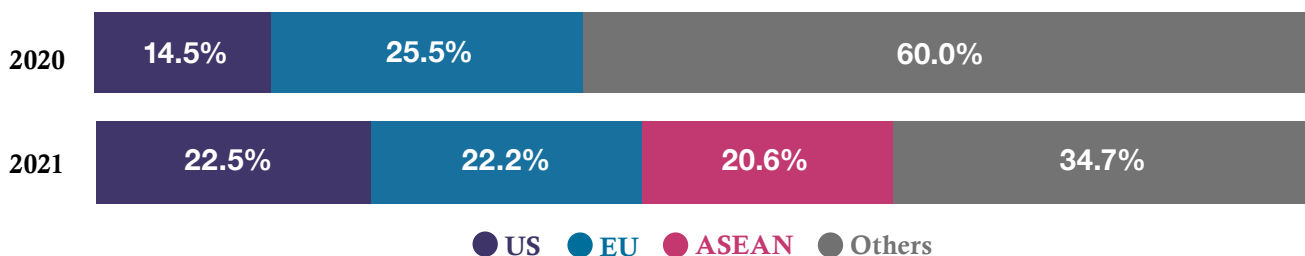
Answered: 151 (Respondents who chose the "ASEAN" option in Q20), 507 (Respondents who chose the "China" option in Q20), 314 (Respondents who chose "The US" option in Q20)

Country	ASEAN				China				The United States			
	I am worried about its growing regional political and strategic influence		I welcome its growing regional political and strategic influence		I am worried about its growing regional political and strategic influence		I welcome its growing regional political and strategic influence		I am worried about its growing regional political and strategic influence		I welcome its growing regional political and strategic influence	
	2020	2021	2020	2021	2020	2021	2020	2021	2020	2021	2020	2021
ASEAN	16.0%	16.6%	84.0%	83.4%	85.4%	88.6%	14.6%	11.4%	47.3%	36.9%	52.7%	63.1%
Brunei	9.7%	0.0%	90.3%	100.0%	77.1%	85.7%	22.9%	14.3%	53.3%	22.2%	46.7%	77.8%
Cambodia	66.7%	0.0%	33.3%	100.0%	73.3%	81.3%	26.7%	18.8%	57.1%	71.4%	42.9%	28.6%
Indonesia	14.7%	19.2%	85.3%	80.8%	73.3%	86.0%	26.7%	14.0%	70.8%	59.5%	29.2%	40.5%
Laos	50.0%	80.0%	50.0%	20.0%	86.7%	69.2%	13.3%	30.8%	0.0%	100.0%	0.0%	0.0%
Malaysia	6.9%	5.3%	93.1%	94.7%	80.9%	79.7%	19.1%	20.3%	59.5%	52.9%	40.5%	47.1%
Myanmar	24.3%	21.1%	75.7%	78.9%	83.9%	91.4%	16.1%	8.6%	61.0%	67.6%	39.0%	32.4%
Philippines	19.4%	13.3%	80.7%	86.7%	87.8%	95.0%	12.2%	5.0%	38.5%	26.9%	61.5%	73.1%
Singapore	9.4%	0.0%	90.6%	100.0%	92.2%	87.1%	7.8%	12.9%	26.0%	15.2%	74.0%	84.8%
Thailand	13.3%	38.5%	86.7%	61.5%	88.2%	92.2%	11.8%	7.8%	71.4%	55.3%	28.6%	44.7%
Vietnam	19.1%	14.8%	80.9%	85.2%	95.3	97.7%	4.7%	2.3%	23.3%	8.3%	76.7%	91.7%

## Leadership in Championing Free Trade

The global free trade agenda has come under further stress and strain due to disrupted supply chains and upended businesses caused by the pandemic. Respondents from Southeast Asia are split between the US (22.5%) and the EU (22.2%) in their respective ability to provide leadership on multilateral trade. The US – which recorded 14.5% in last year’s survey – rebounded to 22.5% this year, most likely due to the Biden effect. The EU dropped slightly from 25.5% last year to 22.2%. Respondents from the business and finance sector similarly view the US (29.5%) and the EU (25.3%) positively. This sector is equally split between ASEAN (13.7%) and China (13.7%). Japan, the first choice in 2020, is in the 4<sup>th</sup> place in this year’s survey.

ASEAN, as a new option in this year’s question, comes third at 20.6%. Brunei (36.4%) and Singapore (25.3%) place their highest vote of confidence in ASEAN’s ability to provide leadership in the global free trade agenda. On the other hand, Cambodia (26.9%), Indonesia (29.5%), Malaysia (23.1%), the Philippines (34.3%) and Thailand (22.1%) are more confident in EU leadership. The US is the top choice for Vietnam (40.0%), Japan for Myanmar (28.2%) and China for Laos (27.5%).



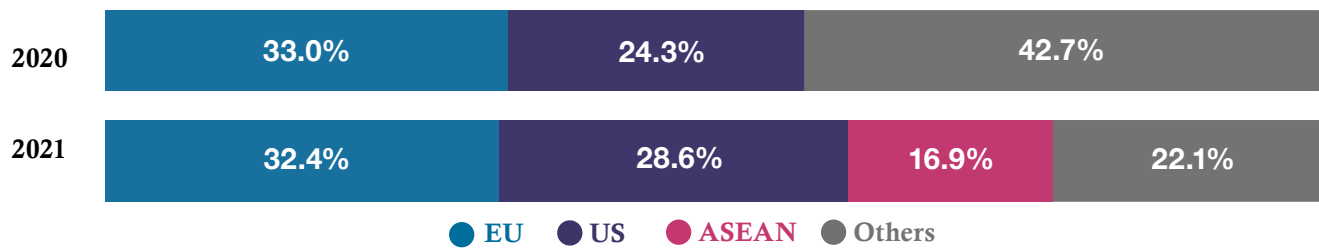
### Q22 Who do you have the strongest confidence in to provide leadership in championing the global free trade agenda?

Country	ASEAN	Australia	China	India	Japan	New Zealand	Republic of Korea	The European Union	The United States	The United Kingdom
ASEAN	20.6%	2.1%	11.4%	0.8%	15.4%	2.8%	0.9%	22.2%	22.5%	1.3%
Brunei	36.4%	3.0%	15.2%	0.0%	24.2%	3.0%	0.0%	3.0%	15.2%	0.0%
Cambodia	15.4%	7.7%	19.2%	0.0%	19.2%	0.0%	0.0%	26.9%	7.7%	3.8%
Indonesia	19.4%	0.0%	20.9%	0.8%	8.5%	2.3%	0.8%	29.5%	15.5%	2.3%
Laos	22.5%	5.0%	27.5%	0.0%	7.5%	5.0%	0.0%	17.5%	15.0%	0.0%
Malaysia	19.7%	3.4%	11.1%	0.0%	13.7%	5.1%	1.7%	23.1%	21.4%	0.9%
Myanmar	23.7%	0.0%	9.6%	1.9%	28.2%	2.6%	0.6%	16.7%	14.7%	1.9%
Philippines	19.4%	4.5%	1.5%	0.0%	11.9%	1.5%	3.0%	34.3%	22.4%	1.5%
Singapore	25.3%	0.6%	15.2%	0.6%	10.1%	3.2%	0.0%	18.4%	24.7%	1.9%
Thailand	17.6%	5.3%	9.2%	2.3%	14.5%	5.3%	2.3%	22.1%	20.6%	0.8%
Vietnam	15.4%	1.1%	2.9%	0.0%	16.6%	0.0%	0.0%	24.0%	40.0%	0.0%

## Leadership in Maintaining the Rules-based Order and Upholding International Law

The EU continues to be seen as the player most capable of filling the global leadership vacuum on the rule of law. Southeast Asian respondents place their strongest confidence in the EU in maintaining the rules-based order and upholding international law (32.4%). Second in place is the US (28.6%), followed by ASEAN (16.9%) and Japan (10.5%). Thailand has the highest confidence in the EU (48.1%), followed by Malaysia (40.2%), the Philippines (38.8%), Indonesia (34.9%), Cambodia (34.6%), Singapore (31.6%), Laos (27.5%), Myanmar (25.0%) and Brunei (24.2%).

The number of ASEAN member states choosing the EU as their top choice in this respect has increased from six to nine this year. The only exception is Vietnam where support for the US is the strongest at 53.7%, up from 45.4% last year. For Myanmar, Japan and the EU are equally ranked in their leadership in maintaining the rules-based order and upholding international law.



### Q23 Who do you have the strongest confidence in to provide leadership to maintain the rules-based order and uphold international law?

Country	ASEAN	Australia	China	India	Japan	New Zealand	Republic of Korea	The European Union	The United States	The United Kingdom
ASEAN	16.9%	2.3%	3.6%	0.6%	10.5%	2.7%	0.4%	32.4%	28.6%	2.1%
Brunei	18.2%	6.1%	3.0%	0.0%	12.1%	9.1%	0.0%	24.2%	15.2%	12.1%
Cambodia	15.4%	0.0%	7.7%	0.0%	19.2%	3.8%	0.0%	34.6%	19.2%	0.0%
Indonesia	24.0%	2.3%	4.7%	0.0%	5.4%	2.3%	0.8%	34.9%	23.3%	2.3%
Laos	25.0%	0.0%	12.5%	0.0%	20.0%	5.0%	0.0%	27.5%	7.5%	2.5%
Malaysia	14.5%	0.9%	4.3%	0.9%	8.5%	6.8%	0.9%	40.2%	20.5%	2.6%
Myanmar	23.1%	0.6%	2.6%	0.6%	25.0%	1.3%	0.6%	25.0%	17.9%	3.2%
Philippines	19.4%	6.0%	0.0%	0.0%	4.5%	0.0%	0.0%	38.8%	29.9%	1.5%
Singapore	12.7%	4.4%	2.5%	0.6%	7.6%	3.2%	0.0%	31.6%	36.7%	0.6%
Thailand	7.6%	3.1%	4.6%	0.8%	9.2%	3.1%	0.8%	48.1%	21.4%	1.5%
Vietnam	15.4%	1.1%	2.3%	1.1%	4.6%	0.0%	0.0%	20.6%	53.7%	1.1%

Note: ASEAN and the UK are added as new options and Russia is removed in this question.

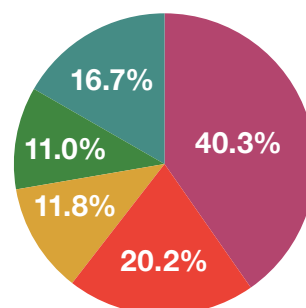


## Views on the Indo-Pacific Strategy

The Indo-Pacific concept appears to have finally turned the corner. 40.3% of Southeast Asians feel that “ASEAN needs to articulate its ASEAN Outlook on the Indo-Pacific (AOIP) more clearly in order to stay relevant”. The second segment (20.2%) think that the Indo-Pacific strategy is “just a tool for different countries to shape geo-politics”. The third segment (16.7%) opine that the strategy “should not be defined by one country, nor should it be used to contain a particular country”.

In response to the 2020 survey question “How do you view the Indo-Pacific concept?”, 54.0% thought that “the concept is unclear and requires further elaboration”. This number has dropped to 11.8% in this year’s iteration. It therefore appears that the Indo-Pacific concept has gained more traction and the focus has shifted for ASEAN to articulate its own outlook rather than to use the articulations by external players. This view is prevalent among nine ASEAN member states, except for Cambodia whose respondents are equally split between the first choice of ASEAN needing to articulate its own Outlook (34.6%) versus the second choice of the Indo-Pacific as a geo-political shaping tool (34.6%). None of the Cambodian

respondents feel that the strategy will help to promote a stable, multipolar order and effective multilateralism while 21.1% of Vietnamese respondents share this view.



- ASEAN needs to articulate its AOIP more clearly
- The Indo-Pacific strategy is just a tool for different countries
- The Indo-Pacific strategy should not be defined by one country, nor used to contain a particular country
- The Indo-Pacific strategy is unclear and requires further elaboration
- The Indo-Pacific strategy promotes a stable, multipolar order and effective multilateralism

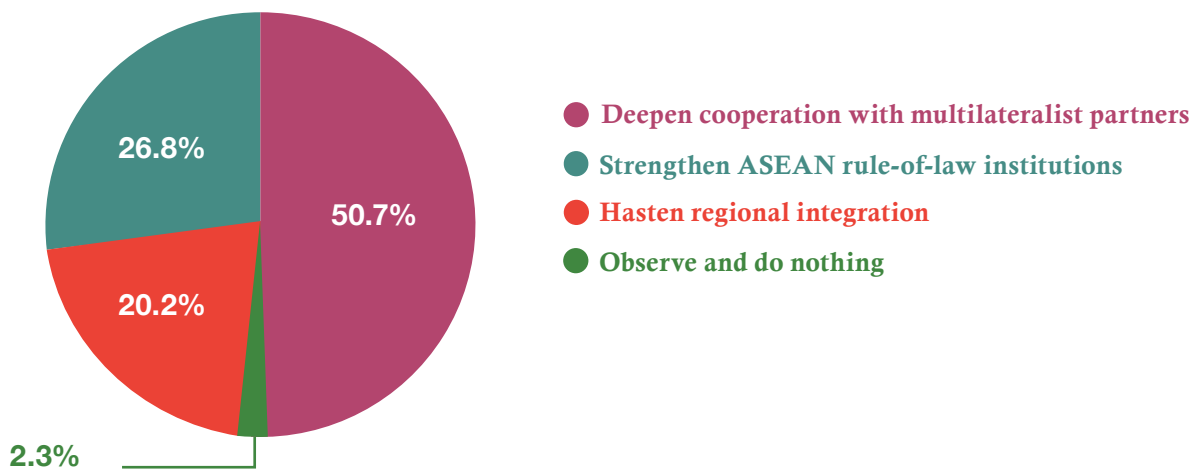
**Q24** Many countries have put forward their versions of an Indo-Pacific strategy such as the US, Australia, Japan, India, France, UK, Germany and Indonesia. Which statement below do you most agree with?

Country	ASEAN needs to articulate its AOIP more clearly in order to stay relevant	The Indo-Pacific strategy is just a tool for different countries to shape geo-politics	The Indo-Pacific strategy is unclear and requires further elaboration	The Indo-Pacific strategy promotes a stable, multipolar order and effective multilateralism	The Indo-Pacific strategy should not be defined by one country, nor should it be used to contain a particular country
ASEAN	40.3%	20.2%	11.8%	11.0%	16.7%
Brunei	51.5%	18.2%	3.0%	9.1%	18.2%
Cambodia	34.6%	34.6%	15.4%	0.0%	15.4%
Indonesia	41.9%	16.3%	11.6%	12.4%	17.8%
Laos	35.0%	12.5%	30.0%	5.0%	17.5%
Malaysia	37.6%	21.4%	12.0%	10.3%	18.8%
Myanmar	44.2%	20.5%	14.1%	9.6%	11.5%
Philippines	55.2%	11.9%	11.9%	11.9%	9.0%
Singapore	35.4%	24.7%	9.5%	7.6%	22.8%
Thailand	33.6%	24.4%	13.7%	6.9%	21.4%
Vietnam	41.1%	17.7%	7.4%	21.1%	12.6%

## Views on Rising Protectionism and Nationalism around the World

The majority of respondents prefer that ASEAN “deepen cooperation with like-minded multilateralist partners beyond ASEAN” (50.7%), followed by strengthening ASEAN institutions that support the rule of law (26.8%) and hastening “regional integration among ASEAN member states” (20.2%). Only a minority feel that ASEAN should “observe and do nothing” (2.3%).

At the country-level, Brunei (72.7%), Singapore (65.2%), Vietnam (62.3%), Cambodia (53.8%), Indonesia (49.6%), Malaysia (48.7%), Thailand (45.8%) and Laos (37.5%) prefer to “deepen cooperation with like-minded multilateralist partners beyond ASEAN” over other options. The only country that chooses “Strengthen ASEAN institutions that support the rule of law” as its top choice is Myanmar (42.9%).



### Q25 How should ASEAN respond to rising protectionism and nationalism around the world?

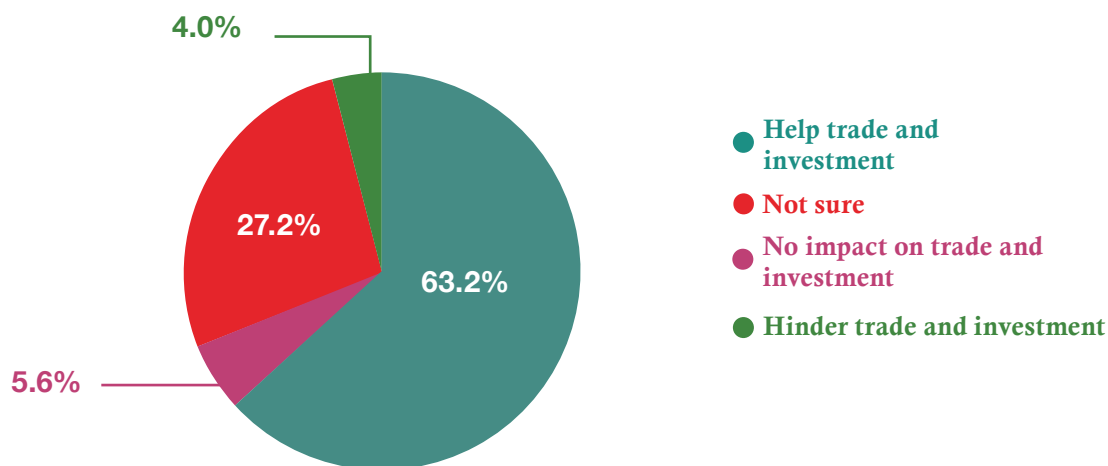
Country	Deepen cooperation with like-minded multilateralist partners beyond ASEAN	Hasten regional integration among ASEAN member states	Observe and do nothing	Strengthen ASEAN institutions that support the rule of law
ASEAN	50.7%	20.2%	2.3%	26.8%
Brunei	72.7%	15.2%	0.0%	12.1%
Cambodia	53.8%	23.1%	0.0%	23.1%
Indonesia	49.6%	19.4%	0.8%	30.2%
Laos	37.5%	20.0%	12.5%	30.0%
Malaysia	48.7%	22.2%	0.0%	29.1%
Myanmar	36.5%	12.8%	7.7%	42.9%
Philippines	29.9%	35.8%	0.0%	34.3%
Singapore	65.2%	17.7%	0.6%	16.5%
Thailand	45.8%	27.5%	2.3%	24.4%
Vietnam	62.3%	17.1%	1.1%	19.4%



## Impact of the Regional Comprehensive Economic Partnership (RCEP) Agreement on Trade and Investment

The largest trade bloc in the world has emerged with the signing of the Regional Comprehensive Economic Partnership (RCEP) Agreement among ten ASEAN member states, Australia, China, Japan, New Zealand and the ROK in November 2020. 63.2% of ASEAN respondents agree that RCEP will help trade and investment in their

country while 27.2% express uncertainty. Singaporean respondents are the most enthusiastic about RCEP (75.9%), followed by Cambodia (73.1%). Among the ten member states, Philippine respondents are the most unsure of RCEP's effects on their economy (40.3%).



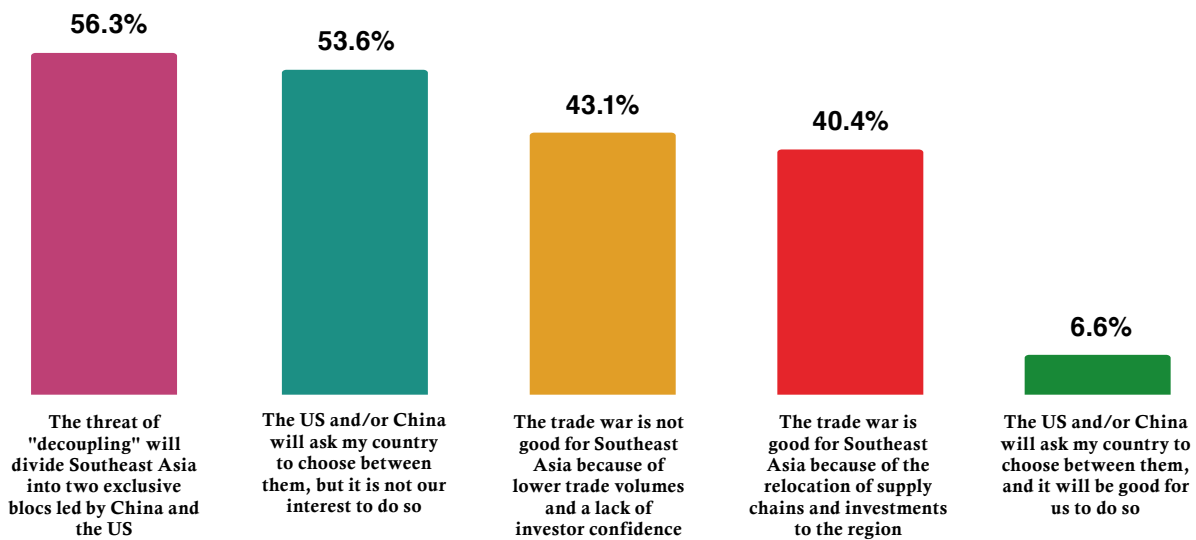
### Q26 What is your view on the impact of the Regional Comprehensive Economic Partnership (RCEP) on trade and investment in your country?

Country	It will help trade and investment in my country	It will hinder trade and investment in my country	It will not have any impact on trade and investment in my country	Not sure
ASEAN	63.2%	4.0%	5.6%	27.2%
Brunei	69.7%	0.0%	3.0%	27.3%
Cambodia	73.1%	3.8%	0.0%	23.1%
Indonesia	61.2%	3.9%	8.5%	26.4%
Laos	55.0%	12.5%	10.0%	22.5%
Malaysia	69.2%	0.9%	4.3%	25.6%
Myanmar	58.3%	7.7%	4.5%	29.5%
Philippines	50.7%	1.5%	7.5%	40.3%
Singapore	75.9%	0.0%	5.1%	19.0%
Thailand	51.9%	9.9%	6.1%	32.1%
Vietnam	65.7%	1.7%	5.1%	27.4%

## Sentiments on the US-China Trade War

The US-China trade war has heightened the sense of uncertainty in Southeast Asia. 56.3% of the respondents are concerned that the “threat of “decoupling” will divide Southeast Asia into two exclusive blocs led by China and the US. 53.6% fear that “the US and/or China will ask my country to choose between them, but it is not our interest to do so”. Interestingly, and perhaps due to the disruptions brought on by the pandemic, 40.4% think that the trade

war is good for Southeast Asia because of the relocation of supply chains and investments to this region. 59.4% of Vietnamese respondents share this view as the country is widely considered the biggest beneficiary from the relocation of manufacturing bases from China. However, Vietnamese respondents (58.3%) are equally concerned over the bifurcation of Southeast Asia as a result of US-China “decoupling”.



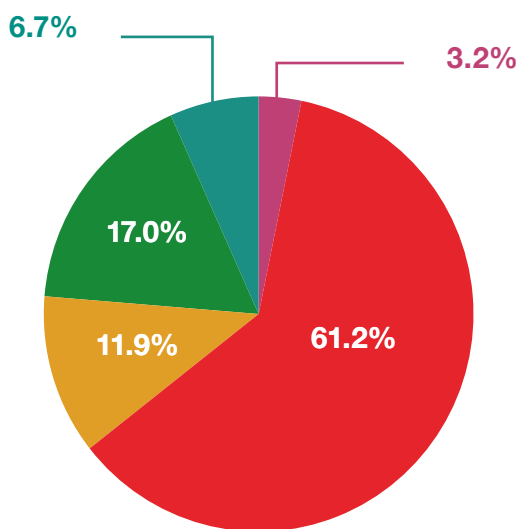
### Q27 After more than a year of the US-China trade war, which options below best reflect your sentiments? (check 2 responses)

Country	The threat of "decoupling" will divide Southeast Asia into two exclusive blocs led by China and the US	The trade war is good for Southeast Asia because of the relocation of supply chains and investments to the region	The trade war is not good for Southeast Asia because of lower trade volumes and a lack of investor confidence	The US and/or China will ask my country to choose between them, and it will be good for us to do so	The US and/or China will ask my country to choose between them, but it is not our interest to do so
ASEAN	56.3%	40.4%	43.1%	6.6%	53.6%
Brunei	60.6%	51.5%	30.3%	3.0%	54.5%
Cambodia	69.2%	23.1%	53.8%	3.8%	50.0%
Indonesia	51.9%	49.6%	35.7%	8.5%	54.3%
Laos	70.0%	35.0%	57.5%	12.5%	25.0%
Malaysia	56.4%	41.0%	37.6%	6.0%	59.0%
Myanmar	55.1%	34.0%	57.7%	10.3%	42.9%
Philippines	56.7%	43.3%	49.3%	7.5%	43.3%
Singapore	50.6%	31.6%	39.2%	2.5%	75.9%
Thailand	58.0%	24.4%	49.6%	5.3%	62.6%
Vietnam	58.3%	59.4%	33.1%	6.3%	42.9%

## Views on the Prospects of the US-China Trade War

For this crystal-ball question, the majority of respondents (61.2%) think that the trade war's intensity will ease but US-China relations are expected to continue to be rocky. 17.0% expect the US to tone down its aggressive stance

towards China, possibly due to the change of leadership in the US whereas only 3.2% think that China will meet US demands and conditions. Very few (6.7%) harbour hope that US-China trade relations will return to the pre-trade war status.



- The intensity of the trade war will ease, but US-China relations will continue to be rocky
- The US will tone down its aggressive stance towards China
- The intensity of the trade war will increase, resulting in a more unpredictable and unstable world
- US-China trade relations will return to pre-trade war status
- China will meet the US' demands and conditions

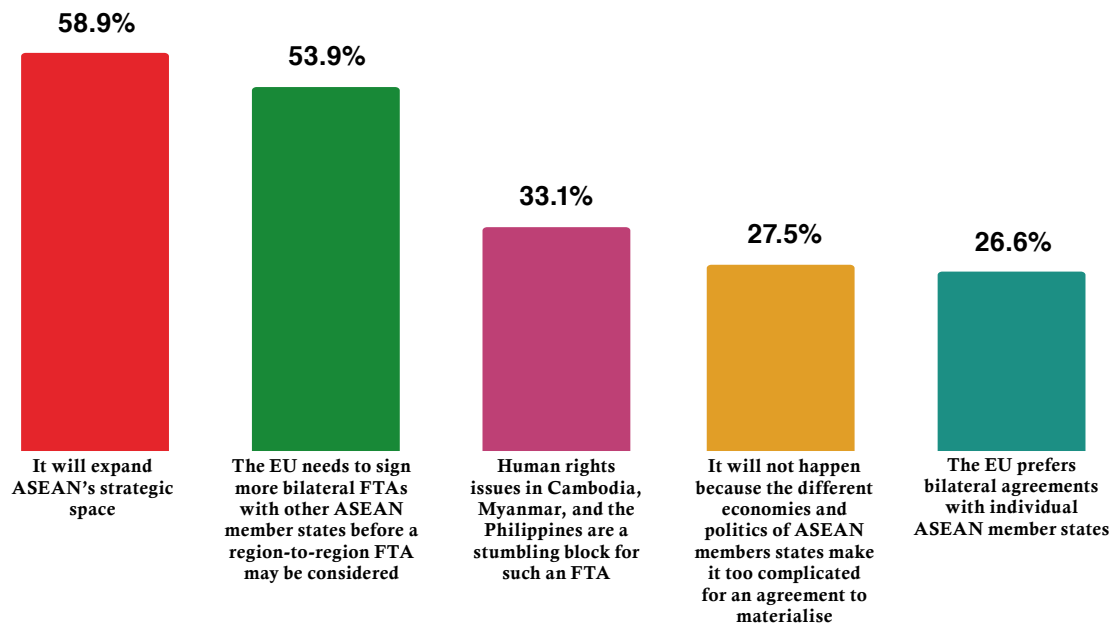
### Q28 How do you think the US-China trade war will evolve one year from now?

Country	China will meet the US' demands and conditions	The intensity of the trade war will ease, but US-China relations will continue to be rocky	The intensity of the trade war will increase, resulting in a more unpredictable and unstable world	The US will tone down its aggressive stance towards China	US-China trade relations will return to pre-trade war status
ASEAN	3.2%	61.2%	11.9%	17.0%	6.7%
Brunei	0.0%	72.7%	6.1%	18.2%	3.0%
Cambodia	0.0%	65.4%	11.5%	15.4%	7.7%
Indonesia	3.9%	62.8%	12.4%	11.6%	9.3%
Laos	15.0%	27.5%	22.5%	20.0%	15.0%
Malaysia	0.9%	68.4%	9.4%	14.5%	6.8%
Myanmar	7.1%	44.9%	13.5%	23.1%	11.5%
Philippines	3.0%	68.7%	13.4%	14.9%	0.0%
Singapore	0.0%	74.7%	8.9%	14.6%	1.9%
Thailand	3.8%	51.1%	13.7%	25.2%	6.1%
Vietnam	1.7%	67.4%	11.4%	13.1%	6.3%

## Views on a Possible ASEAN-EU Free Trade Agreement (FTA)

58.9% of the respondents feel that an ASEAN-EU FTA will expand ASEAN’s strategic space. This view is most prevalent among the two ASEAN member states that have signed bilateral FTAs with the EU, namely Vietnam (72.0%) and Singapore (65.8%).

53.9% feel that the EU needs to sign more bilateral FTAs with other ASEAN member states before a region-to-region FTA may be considered. Another 33.1% expect that human rights issues in Cambodia, Myanmar and the Philippines will be a stumbling block to a region-to-region FTA.



### Q29 Which responses below reflect your views on a possible ASEAN-EU FTA? (check 2 responses)

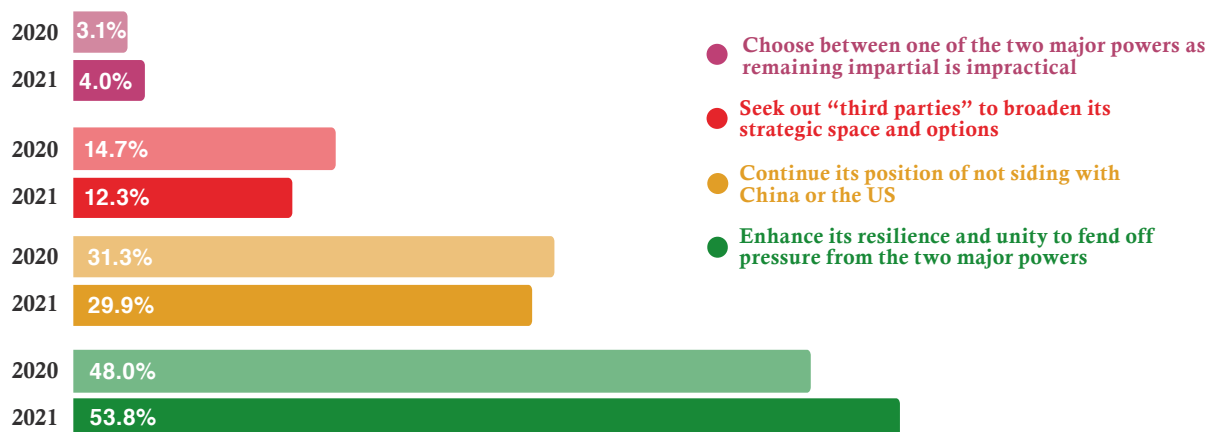
Country	Human rights issues in Cambodia, Myanmar, and the Philippines are a stumbling block for such an FTA	It will expand ASEAN’s strategic space	It will not happen because the different economies and politics of ASEAN members states make it too complicated for an agreement to materialise	The EU needs to sign more bilateral FTAs with other ASEAN member states before a region-to-region FTA may be considered	The EU prefers bilateral agreements with individual ASEAN member states
ASEAN	33.1%	58.9%	27.5%	53.9%	26.6%
Brunei	54.5%	51.5%	24.2%	51.5%	18.2%
Cambodia	34.6%	57.7%	19.2%	53.8%	34.6%
Indonesia	33.3%	51.2%	32.6%	49.6%	33.3%
Laos	22.5%	65.0%	27.5%	42.5%	42.5%
Malaysia	40.2%	51.3%	34.2%	53.0%	21.4%
Myanmar	23.1%	57.1%	21.8%	62.2%	35.9%
Philippines	37.3%	62.7%	19.4%	61.2%	19.4%
Singapore	41.1%	65.8%	29.1%	51.3%	12.7%
Thailand	43.5%	48.1%	38.2%	42.7%	27.5%
Vietnam	18.9%	72.0%	20.0%	61.1%	28.0%

This section examines ASEAN's options in the unfolding power play among the major powers and in the changing regional architecture.

## Assessing ASEAN's "Non-choice"

The default position of ASEAN's tightrope balancing act has always been not to choose sides. This position receives support from 29.9% of the respondents, down from 31.3% last year. Instead, 53.8% prefer to have ASEAN enhance its resilience and unity to fend off pressures from the two major powers, up from 48.0% last year. Enhancing ASEAN resilience and unity is the top option for eight

ASEAN member states, except in Laos and Myanmar. Laos continues to favour the default position of not taking sides (42.5%) while Myanmar is divided between not taking sides (36.5%) and enhancing ASEAN resilience (36.5%). The third favoured option is for ASEAN to seek out "third parties" to broaden its strategic space and options (12.3%), a drop from 14.7% last year.



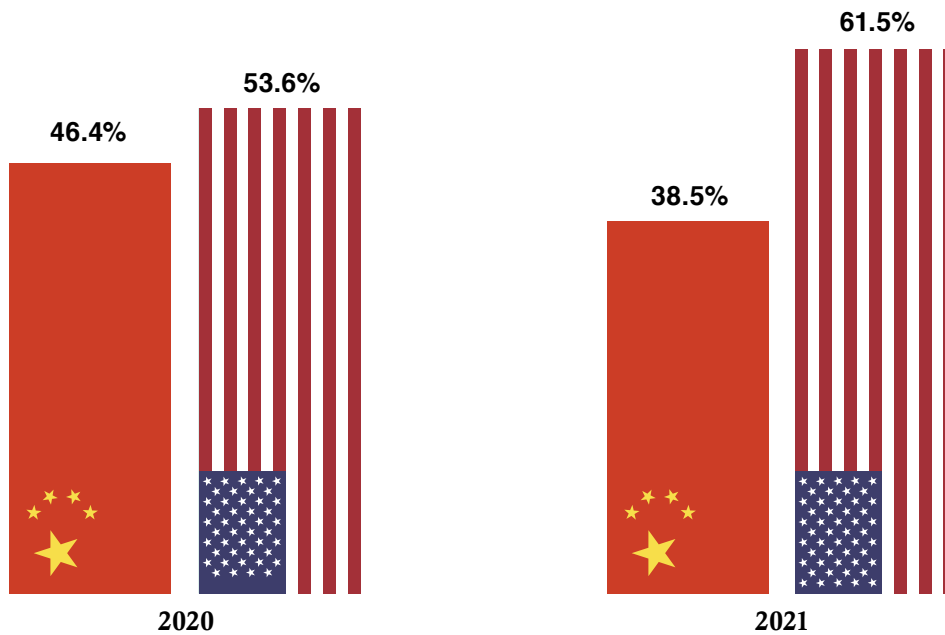
## Q30 ASEAN is caught in the crossfire as Beijing and Washington compete for influence and leadership in Southeast Asia. How should ASEAN best respond?

Country	ASEAN has to choose between one of the two major powers as remaining impartial is impractical		ASEAN has to seek out "third parties" to broaden its strategic space and options		ASEAN should continue its position of not siding with China or the US		ASEAN should enhance its resilience and unity to fend off pressure from the two major powers	
	2020	2021	2020	2021	2020	2021	2020	2021
ASEAN	3.1%	4.0%	14.7%	12.3%	31.3%	29.9%	48.0%	53.8%
Brunei	1.0%	0.0%	12.4%	18.2%	38.2%	39.4%	47.4%	42.4%
Cambodia	0.0%	0.0%	11.5%	7.7%	34.6%	23.1%	53.9%	69.2%
Indonesia	2.0%	3.1%	16.9%	8.5%	31.8%	27.9%	48.0%	60.5%
Laos	4.4%	5.0%	13.0%	17.5%	47.8%	42.5%	30.4%	35.0%
Malaysia	3.1%	8.5%	11.0%	4.3%	35.0%	35.9%	50.3%	51.3%
Myanmar	6.1%	8.3%	20.9%	18.6%	32.4%	36.5%	32.4%	36.5%
Philippines	2.9%	1.5%	13.1%	17.9%	27.8%	17.9%	54.0%	62.7%
Singapore	2.2%	1.9%	17.6%	14.6%	30.2%	31.6%	48.6%	51.9%
Thailand	1.0%	4.6%	6.3%	13.7%	35.4%	32.1%	54.2%	49.6%
Vietnam	4.0%	1.1%	11.2%	8.0%	19.7%	19.4%	62.5%	71.4%

## ASEAN’s Future: China or the US?

61.5% of the respondents choose the US, up from 53.6% last year whereas 38.5% choose China, down from 46.4% last year. Country-level data presents a more nuanced picture and reflects shifts in positions. Where seven ASEAN member states chose China last year, this number dropped to three this year: Myanmar (51.9%), Brunei (69.7%) and Laos (80.0%). In comparison, the US enjoys stronger support this year from the Philippines (86.6%),

Vietnam (84.0%), Singapore (65.8%), Indonesia (64.3%), Thailand (56.5%), Cambodia (53.8%) and Malaysia (53.0%). The “swing votes” this year are from Cambodia, Indonesia, Malaysia and Thailand. The region’s support for Washington may have increased as a result of the prospects of the new Biden Administration. The US presidential elections took place during the period of the conduct of this survey.

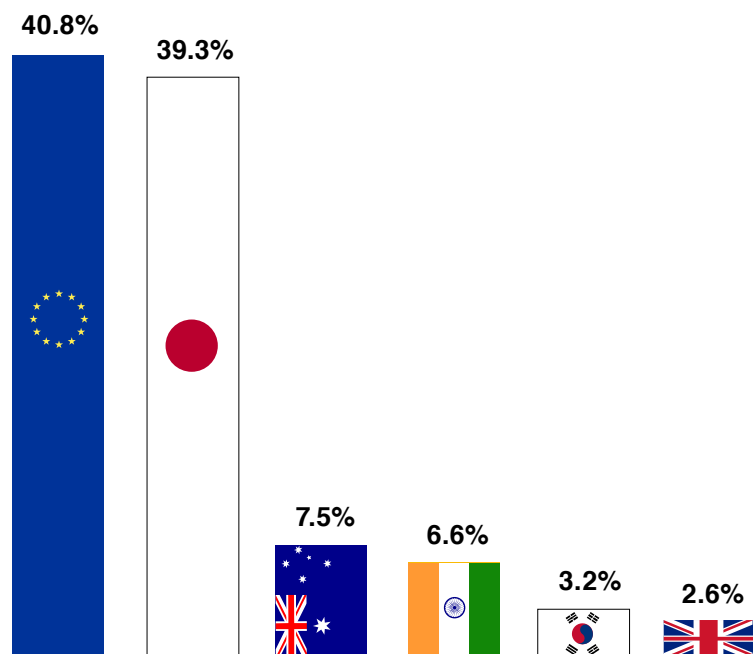


### Q31 If ASEAN were forced to align itself with one of the two strategic rivals, which should it choose?

Country	China		The United States	
	2020	2021	2020	2021
ASEAN	46.4%	38.5%	53.6%	61.5%
Brunei	69.1%	69.7%	30.9%	30.3%
Cambodia	57.7%	46.2%	42.3%	53.8%
Indonesia	52.0%	35.7%	48.0%	64.3%
Laos	73.9%	80.0%	26.1%	20.0%
Malaysia	60.7%	47.0%	39.3%	53.0%
Myanmar	61.5%	51.9%	38.5%	48.1%
Philippines	17.5%	13.4%	82.5%	86.6%
Singapore	38.7%	34.2%	61.3%	65.8%
Thailand	52.1%	43.5%	47.9%	56.5%
Vietnam	14.5%	16.0%	85.5%	84.0%

## Broadening ASEAN's Strategic Options

The EU and Japan remain the clear front-runners for ASEAN in this strategic hedging game. 40.8% of the respondents choose the EU, followed closely by Japan (39.3%). Australia remains a distant third option for ASEAN at 7.5%, similar to last year's result (8.8%). Brunei favours both the EU and Japan equally.



### Q32 If ASEAN were to seek out “third parties” to hedge against the uncertainties of the US-China strategic rivalry, who is your most preferred and trusted strategic partner for ASEAN?

Country	Australia	India	Japan	Republic of Korea	The European Union	The United Kingdom
ASEAN	7.5%	6.6%	39.3%	3.2%	40.8%	2.6%
Brunei	18.2%	6.1%	30.3%	3.0%	30.3%	12.1%
Cambodia	3.8%	15.4%	38.5%	0.0%	42.3%	0.0%
Indonesia	7.8%	3.1%	23.3%	7.8%	55.8%	2.3%
Laos	5.0%	2.5%	35.0%	7.5%	50.0%	0.0%
Malaysia	7.7%	6.8%	30.8%	5.1%	43.6%	6.0%
Myanmar	7.7%	10.3%	62.8%	0.6%	15.4%	3.2%
Philippines	13.4%	3.0%	35.8%	4.5%	43.3%	0.0%
Singapore	6.3%	5.1%	38.0%	3.8%	44.9%	1.9%
Thailand	6.1%	8.4%	35.1%	2.3%	47.3%	0.8%
Vietnam	5.7%	6.9%	44.6%	0.0%	40.6%	2.3%

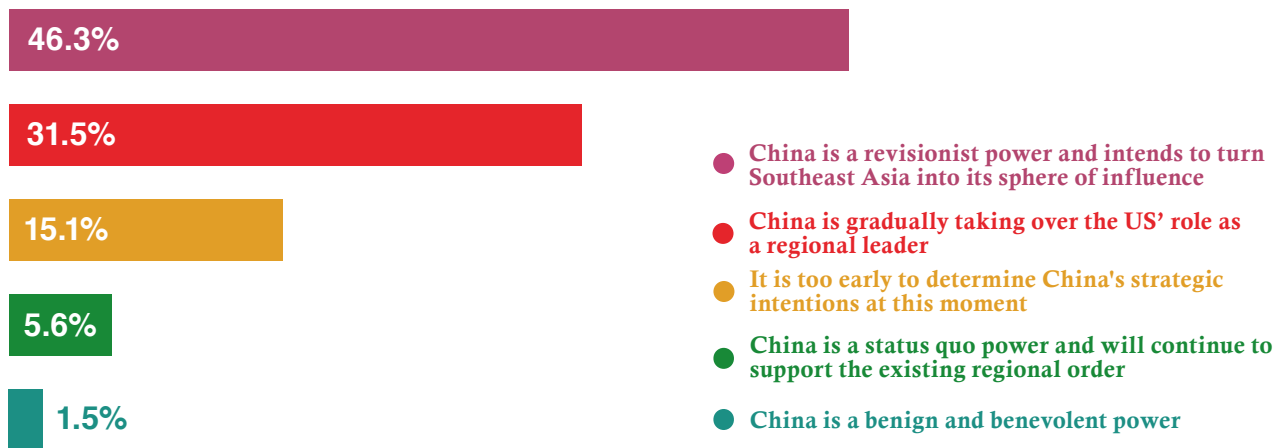


## Impact of China’s Re-emergence as a Major Power

The widely held view by 46.3% of the respondents is that “China is a revisionist power and intends to turn Southeast Asia into its sphere of influence”, an increase from 38.2% last year. This is the top response in seven ASEAN member states: Vietnam (65.1%), the Philippines (59.7%), Singapore (48.1%), Thailand (45.8%), Malaysia (45.3%), Laos (45.0%) and Indonesia (41.9%). This list of seven countries who think that Southeast Asia is at risk of being absorbed into China’s sphere of influence increased

from four countries in 2020 (Malaysia, the Philippines, Singapore and Vietnam).

31.5% of the respondents think that China is gradually taking over the US’ role as a regional leader, a drop from 34.7% last year. This view was the top response for six ASEAN member states (Cambodia, Thailand, Laos, Indonesia, Myanmar and Brunei) last year, but it is the top response for only Cambodia (46.2%), Brunei (42.4%) and Myanmar (39.1%) this year.



### Q33 Which statement below most accurately reflects your view of China’s re-emergence as a major power with respect to Southeast Asia?

Country	China is a revisionist power and intends to turn Southeast Asia into its sphere of influence		China is gradually taking over the US role as a regional leader		It is too early to determine China's strategic intentions at this moment		China is a status quo power and will continue to support the existing regional order		China is a benign and benevolent power	
	2020	2021	2020	2021	2020	2021	2020	2021	2020	2021
ASEAN	38.2%	46.3%	34.7%	31.5%	18.5%	15.1%	7.1%	5.6%	1.5%	1.5%
Brunei	30.9%	36.4%	33.0%	42.4%	23.7%	12.1%	12.4%	9.1%	0.0%	0.0%
Cambodia	23.0%	26.9%	57.7%	46.2%	11.5%	11.5%	3.9%	11.5%	3.9%	3.8%
Indonesia	27.0%	41.9%	38.5%	31.0%	24.3%	20.9%	9.5%	6.2%	0.7%	0.0%
Laos	17.4%	45.0%	39.1%	32.5%	39.1%	12.5%	4.4%	10.0%	0.0%	0.0%
Malaysia	41.1%	45.3%	36.2%	28.2%	14.7%	15.4%	8.0%	9.4%	0.0%	1.7%
Myanmar	25.8%	28.2%	38.5%	39.1%	23.4%	22.4%	8.6%	5.8%	3.7%	4.5%
Philippines	54.0%	59.7%	29.2%	22.4%	13.1%	14.9%	3.7%	3.0%	0.0%	0.0%
Singapore	40.6%	48.1%	35.1%	36.1%	16.2%	11.4%	8.1%	3.2%	0.0%	1.3%
Thailand	33.3%	45.8%	45.8%	35.1%	14.6%	9.2%	5.2%	9.2%	1.1%	0.8%
Vietnam	61.2%	65.1%	17.1%	19.4%	14.5%	13.7%	2.0%	0.6%	5.2%	1.1%

## The Future of China's Relations with Regional Countries

The region has taken note of China's active and proactive engagement with ASEAN member states both bilaterally and at the ASEAN level, especially through the pandemic. But how do Southeast Asians see their bilateral relations with China evolving in the next three years? The majority of respondents (47.1%) expect the status quo to remain, a slight increase from 45.5% last year. Another 39.8% expect their bilateral relations with China to improve while a small minority of 13.1% think relations will worsen.

At the country-level, the prognosis is more nuanced. There is an equal split between countries which feel that bilateral relations will improve – Cambodia (80.8%), Laos (62.5%) Indonesia (58.1%), Brunei (57.6%) and Thailand (50.4%) – and countries which feel that bilateral relations will remain the same – Vietnam (58.9%), Malaysia (53.8%), Singapore (51.9%), Myanmar (50.6%) and the Philippines (49.3%). Among countries that expect relations to worsen, Philippine respondents are the most pessimistic (29.9%), followed by Vietnam (25.7%).



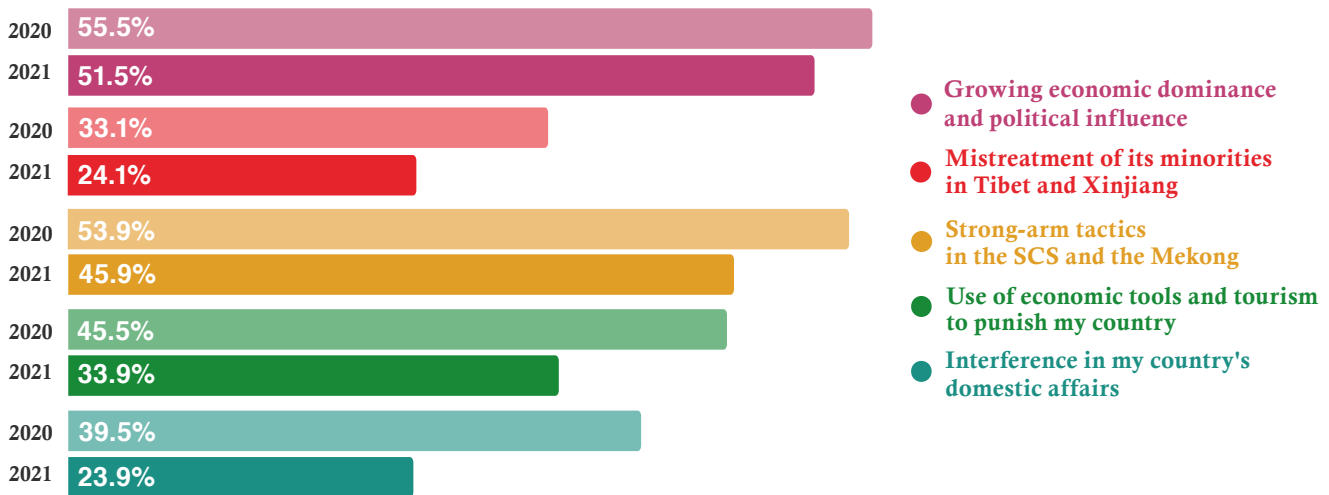
### Q34 How do you see China's relations with your country evolving in the next three years?

Country	Improve significantly		Improve		Remain the same as present		Worsen		Worsen significantly	
	2020	2021	2020	2021	2020	2021	2020	2021	2020	2021
ASEAN	8.3%	10.8%	30.0%	29.0%	45.5%	47.1%	12.7%	10.9%	3.5%	2.2%
Brunei	21.7%	15.2%	44.3%	42.4%	27.8%	36.4%	6.2%	6.1%	0.0%	0.0%
Cambodia	38.4%	46.2%	30.8%	34.6%	30.8%	15.4%	0.0%	3.8%	0.0%	0.0%
Indonesia	10.1%	18.6%	43.9%	39.5%	38.5%	34.1%	6.1%	4.7%	1.4%	3.1%
Laos	26.1%	30.0%	52.2%	32.5%	21.7%	30.0%	0.0%	2.5%	0.0%	5.0%
Malaysia	6.7%	10.3%	36.2%	29.1%	52.8%	53.8%	4.3%	6.0%	0.0%	0.9%
Myanmar	4.5%	5.1%	21.3%	33.3%	59.0%	50.6%	9.9%	10.3%	5.3%	0.6%
Philippines	7.3%	4.5%	21.9%	16.4%	33.6%	49.3%	29.2%	20.9%	8.0%	9.0%
Singapore	4.0%	6.3%	35.1%	29.7%	47.8%	51.9%	12.6%	11.4%	0.5%	0.6%
Thailand	15.6%	17.6%	38.5%	32.8%	32.4%	42.0%	8.3%	6.1%	5.2%	1.5%
Vietnam	0.0%	1.1%	5.9%	14.3%	55.9%	58.9%	29.0%	22.3%	9.2%	3.4%

## The Future of China's Relations with Regional Countries

The majority of respondents (51.5%) feel that “China’s growing economic dominance and political influence in my country” could potentially worsen their positive impression of China. This concern is most pronounced in Myanmar (73.3%), followed by Laos (72.0%), Cambodia (66.7%), Thailand (59.1%), Brunei (57.9%), Indonesia (57.3%) and the Philippines (50.0%). The close second

concern (45.9%) is “China’s strong-arm tactics in the South China Sea and the Mekong”. This is the top concern for Vietnam (74.1%) and Malaysia (65.2%). The third concern (33.9%) is “China’s use of economic tools and tourism to punish my country’s foreign policy choices”, which is also Singapore’s top concern.



### Q35 What are the concerns that could potentially worsen your positive impression of China? (check 2 responses)

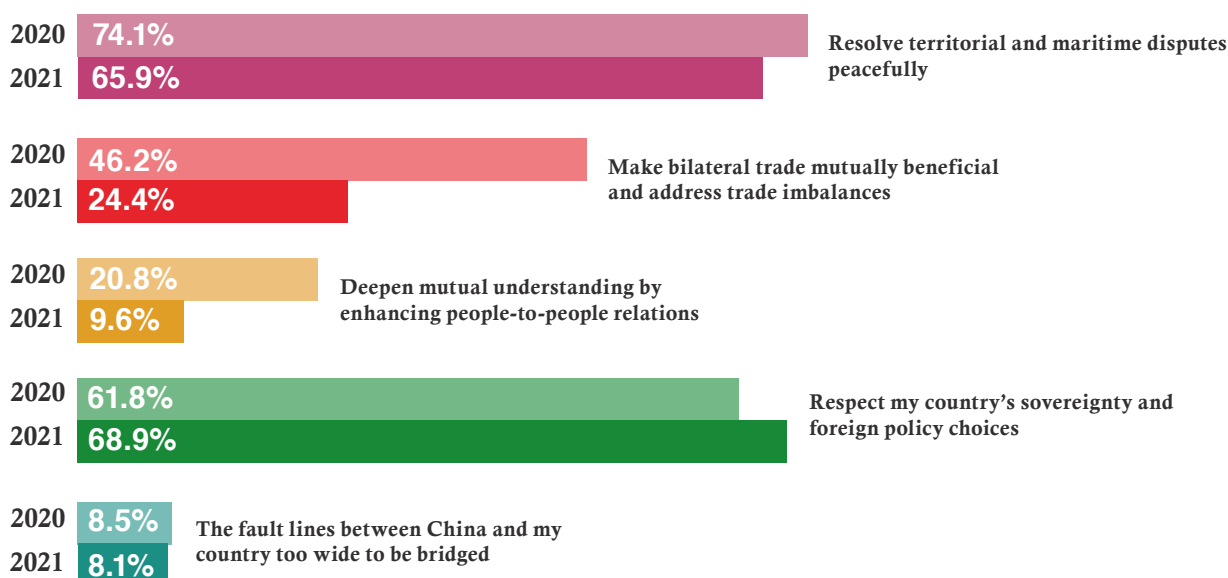
Answered: 410 (Respondents who chose the "Improve" and "Improve significantly" options in Q34)

Country	China's growing economic dominance and political influence in my country		China's mistreatment of its minorities in Tibet and Xinjiang and its handling of Hong Kong		China's strong-arm tactics in the South China Sea and the Mekong		China's use of economic tools and tourism to punish my country's foreign policy choices		China's interference in my country's domestic affairs	
	2020	2021	2020	2021	2020	2021	2020	2021	2020	2021
ASEAN	55.5%	51.5%	33.1%	24.1%	53.9%	45.9%	45.5%	33.9%	39.5%	23.9%
Brunei	61.0%	57.9%	45.3%	47.4%	51.6%	52.6%	39.1%	10.5%	39.1%	15.8%
Cambodia	88.9%	66.7%	11.1%	14.3%	38.9%	28.6%	44.4%	33.3%	22.2%	33.3%
Indonesia	63.7%	57.3%	46.3%	42.7%	45.0%	36.0%	35.0%	26.7%	24.0%	18.7%
Laos	61.1%	72.0%	5.6%	8.0%	50.0%	28.0%	44.4%	44.0%	38.9%	28.0%
Malaysia	38.6%	39.1%	54.3%	30.4%	62.9%	65.2%	45.7%	34.8%	22.9%	10.9%
Myanmar	69.8%	73.3%	9.5%	3.3%	38.1%	31.7%	38.1%	21.7%	68.3%	46.7%
Philippines	55.0%	50.0%	22.5%	0.0%	72.5%	35.7%	22.5%	42.9%	27.5%	28.6%
Singapore	37.9%	12.3%	27.6%	22.8%	63.2%	52.6%	67.8%	54.4%	72.4%	38.6%
Thailand	57.7%	59.1%	28.9%	30.3%	55.8%	51.5%	61.5%	33.3%	15.4%	7.6%
Vietnam	55.6%	37.0%	55.6%	14.8%	44.4%	74.1%	33.3%	40.7%	22.2%	11.1%

## The Future of China's Relations with Regional Countries

68.9% of the respondents feel that “China should respect my country’s sovereignty and not constrain my country’s foreign policy choices”, an increase from 61.8% last year. This is the top choice for respondents from five ASEAN member states – Cambodia (100.0%), Malaysia (87.5%),

Myanmar (76.5%), Thailand (70.0%) and Singapore (68.4%). The SCS disputes also loom large as 65.9% of the respondents feel that “China should resolve all territorial and maritime disputes peacefully in accordance with international law” so as to improve bilateral relations with their countries. To little surprise, this is the top choice for Brunei (100.0%), the Philippines (90.0%) and Vietnam (84.4%).



### Q36 What can China do to improve relations with your country?

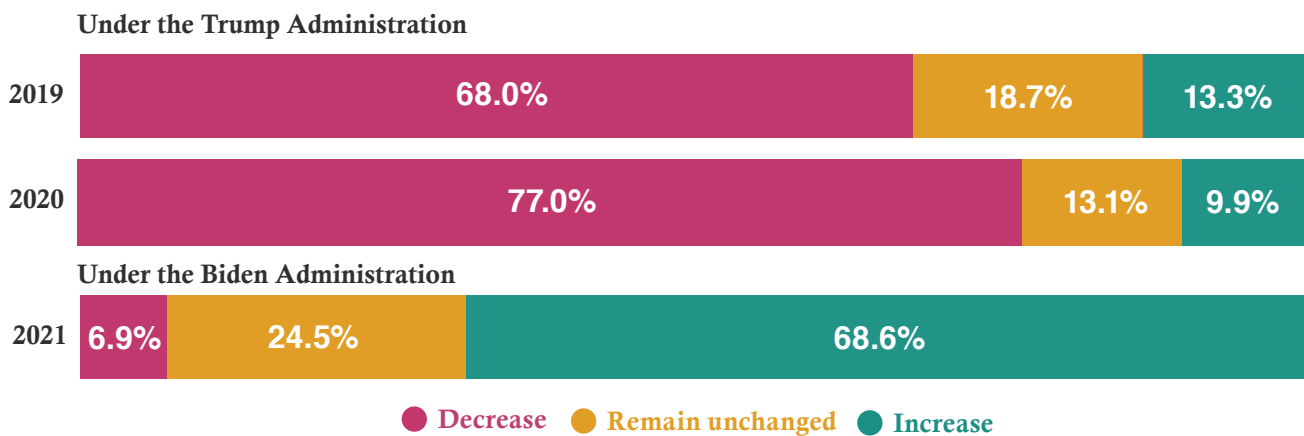
Answered: 135 (Respondents who chose the “Worsen” and “Worsen significantly” options in Q34)

Country	China should resolve all territorial and maritime disputes peacefully in accordance with international law		China should make bilateral trade truly mutually beneficial by addressing the trade imbalances		Deepen mutual understanding by enhancing people-to-people relations		China should respect my country's sovereignty and not constrain my country's foreign policy choices		The fault lines between China and my country are too wide and cannot be bridged	
	2020	2021	2020	2021	2020	2021	2020	2021	2020	2021
ASEAN	74.1%	65.9%	46.2%	24.4%	20.8%	9.6%	61.8%	68.9%	8.5%	8.1%
Brunei	83.3%	100.0%	66.7%	50.0%	33.3%	0.0%	83.3%	50.0%	0.0%	0.0%
Cambodia	0.0%	0.0%	0.0%	100.0%	0.0%	0.0%	0.0%	100.0%	0.0%	0.0%
Indonesia	54.6%	60.0%	54.6%	50.0%	27.3%	20.0%	27.3%	30.0%	18.2%	10.0%
Laos	0.0%	33.3%	0.0%	33.3%	0.0%	0.0%	0.0%	33.3%	0.0%	33.3%
Malaysia	57.1%	62.5%	57.1%	0.0%	14.3%	0.0%	57.1%	87.5%	0.0%	37.5%
Myanmar	35.1%	29.4%	64.9%	29.4%	29.7%	17.6%	67.6%	76.5%	2.7%	11.8%
Philippines	96.1%	90.0%	35.3%	20.0%	17.7%	0.0%	60.8%	80.0%	3.9%	0.0%
Singapore	86.2%	52.6%	44.8%	21.1%	17.2%	21.1%	82.8%	68.4%	6.9%	5.3%
Thailand	30.8%	40.0%	69.2%	40.0%	23.1%	20.0%	38.5%	70.0%	7.7%	10.0%
Vietnam	87.9%	84.4%	34.5%	17.8%	17.2%	4.4%	58.6%	68.9%	17.2%	4.4%

## Assessing US Engagement in the Region

The majority of respondents expect to see the Biden Administration elevate US engagement with the region. 68.6% of the respondents predict that US engagement will either “increase” or “increase significantly”. 24.5% expect US engagement to “remain unchanged” while a small percentage 6.9% expect the engagement to “decrease” or “decrease significantly”. The sense of optimism is most prevalent in Brunei (87.9%), Thailand (78.6%) and Singapore (77.3%). On the other hand, the fear that US engagement will decrease is more pronounced in Vietnam (18.9%) and Laos (10.0%).

The difference between the levels of US engagement under the Trump Administration versus the Biden Administration is rather stark. In 2020, 77.0% of Southeast Asians expect levels of engagement with the US to decrease. 68.6% of respondents expect the US to increase engagement under the Biden Administration this year while 6.9% expect a decrease.



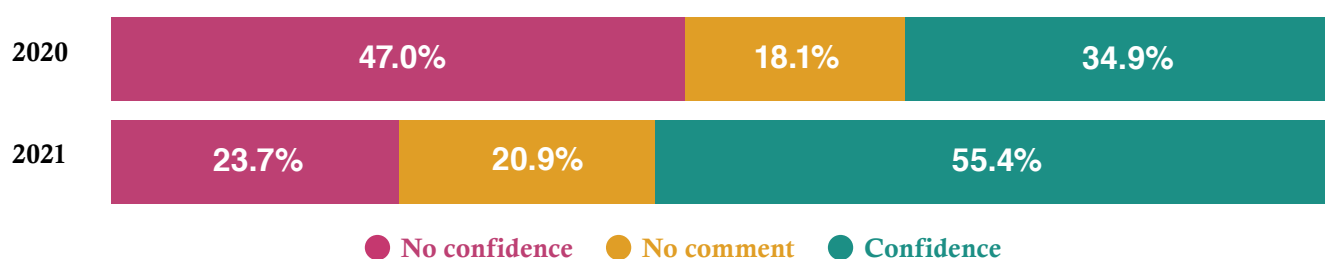
### Q37 The level of US engagement with Southeast Asia under the new Biden Administration will...

Country	Decrease significantly	Decrease	Remain unchanged	Increase	Increase significantly
ASEAN	0.9%	6.0%	24.5%	57.4%	11.2%
Brunei	0.0%	6.1%	6.1%	69.7%	18.2%
Cambodia	0.0%	0.0%	23.1%	65.4%	11.5%
Indonesia	0.0%	3.1%	26.4%	55.8%	14.7%
Laos	5.0%	5.0%	27.5%	52.5%	10.0%
Malaysia	0.9%	5.1%	22.2%	63.2%	8.5%
Myanmar	0.0%	3.2%	21.8%	67.3%	7.7%
Philippines	1.5%	1.5%	34.3%	41.8%	20.9%
Singapore	0.0%	5.1%	17.7%	66.5%	10.8%
Thailand	0.8%	3.8%	16.8%	64.1%	14.5%
Vietnam	2.3%	16.6%	38.3%	36.0%	6.9%

## Is the US a Reliable Strategic Partner?

Despite Washington's perceived growing absence and decreasing influence in the region, 55.4% of the respondents still express confidence in the US as a strategic partner and provider of regional security. This is a marked increase from last year's 34.9%, which can be attributed to the general optimism that the new Biden

Administration will pivot back to Southeast Asia. At the country-level, the Philippines (77.6%), Singapore (69.0%) and Brunei (60.6%) express greatest confidence whereas Laos (35.0%), Malaysia (33.3%) and Cambodia (30.8%) are least confident.



### Q38 How confident are you of the US as a strategic partner and provider of regional security?

Country	No confidence		Little confidence		No comment		Some confidence		Full confidence	
	2020	2021	2020	2021	2020	2021	2020	2021	2020	2021
ASEAN	13.8%	4.4%	33.2%	19.3%	18.1%	20.9%	30.3%	49.5%	4.6%	5.9%
Brunei	12.4%	6.1%	41.2%	18.2%	16.5%	15.2%	24.7%	57.6%	5.2%	3.0%
Cambodia	11.5%	0.0%	46.2%	30.8%	23.0%	15.4%	15.4%	46.2%	3.9%	7.7%
Indonesia	17.6%	3.1%	41.9%	21.7%	14.8%	24.0%	25.0%	48.1%	0.7%	3.1%
Laos	17.4%	12.5%	21.7%	22.5%	47.8%	40.0%	8.7%	17.5%	4.4%	7.5%
Malaysia	16.6%	8.5%	36.2%	24.8%	16.5%	11.1%	27.0%	44.4%	3.7%	11.1%
Myanmar	23.8%	9.0%	21.3%	19.2%	28.3%	31.4%	23.3%	38.5%	3.3%	1.9%
Philippines	5.1%	1.5%	24.1%	14.9%	9.5%	6.0%	49.6%	67.2%	11.7%	10.4%
Singapore	10.8%	1.3%	41.9%	17.1%	11.7%	12.7%	31.1%	60.8%	4.5%	8.2%
Thailand	13.5%	3.1%	43.8%	26.0%	18.7%	13.7%	21.9%	52.7%	2.1%	4.6%
Vietnam	4.0%	1.7%	24.3%	10.3%	19.1%	32.0%	46.0%	50.9%	6.6%	5.1%



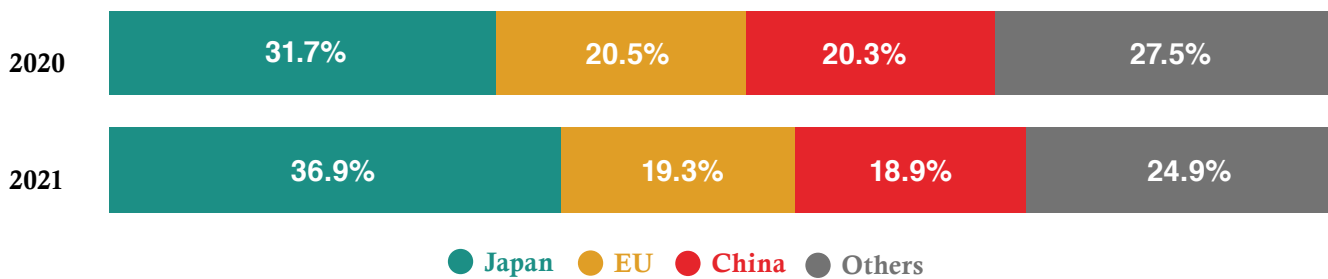
## Who will the Region turn to in America's Absence?

If the US is perceived as unreliable, the most preferred strategic partner for Southeast Asia remains Japan (36.9%) with the EU (19.3%) as a distant second choice. China ranks as the third choice at 18.9%.

Japan is the top choice for Vietnam (66.7%), the Philippines (54.5%), Myanmar (47.7%), Laos (42.9%), Singapore (41.4%), Cambodia (37.5%) and Thailand (28.9%). The EU is the top choice for Brunei (37.5%), Indonesia (34.4%) and Malaysia (30.8%). Cambodia's choice is both Japan (37.5%)

and the EU (37.5%). China is no country's top choice this year. Laos picked China as its top choice last year.

In this year's survey, New Zealand and Russia are removed from the list of choices and the United Kingdom (UK) is added. The UK enjoys some confidence from its traditional close partners in the region – Brunei (12.5%), Malaysia (7.7%), Singapore (6.9%) – and Laos (7.1%).



## Q39 If the US is perceived as unreliable, who would you look to as your country's preferred strategic partner?

Answered: 244 (Respondents who chose the "Little confidence" and "No confidence" options in Q38)

Country	Australia	China	The European Union	India	Japan	Republic of Korea	The United Kingdom
ASEAN	9.8%	18.9%	19.3%	7.8%	36.9%	3.7%	3.7%
Brunei	12.5%	12.5%	37.5%	0.0%	25.0%	0.0%	12.5%
Cambodia	0.0%	12.5%	37.5%	12.5%	37.5%	0.0%	0.0%
Indonesia	9.4%	21.9%	34.4%	3.1%	18.8%	9.4%	3.1%
Laos	7.1%	35.7%	7.1%	0.0%	42.9%	0.0%	7.1%
Malaysia	7.7%	23.1%	30.8%	2.6%	23.1%	5.1%	7.7%
Myanmar	6.8%	18.2%	6.8%	20.5%	47.7%	0.0%	0.0%
Philippines	9.1%	0.0%	18.2%	0.0%	54.5%	18.2%	0.0%
Singapore	17.2%	17.2%	10.3%	3.4%	41.4%	3.4%	6.9%
Thailand	13.2%	23.7%	21.1%	10.5%	28.9%	2.6%	0.0%
Vietnam	9.5%	4.8%	4.8%	9.5%	66.7%	0.0%	4.8%

Note: The UK is added as a new option and New Zealand and Russia are removed in this question.

## SECTION VI: PERCEPTIONS OF TRUST

This section measures the levels of trust in the major powers to “do the right thing” in the wider interests of the global community.

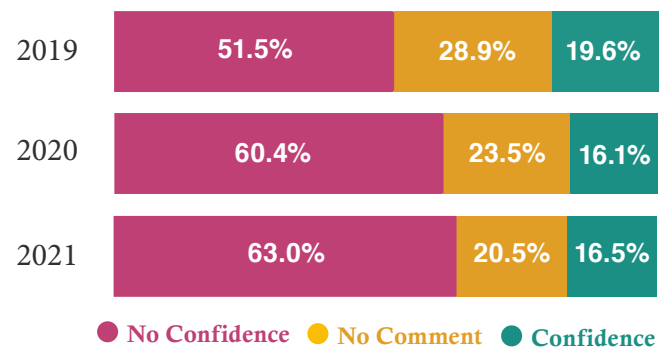
### China

The majority of respondents (63.0%) have either “little confidence” (37.0%) or “no confidence” (26.0%) in China to “do the right thing” to contribute to global peace, security, prosperity and governance. Only 16.5% are either “confident” or “very confident” that China will step up to the plate. Overall, the results show a continued deterioration of trust in China. The percentage of distrust (“little confidence” and “no confidence”) has enlarged from 51.5% in 2019 to 60.4% in 2020 to 63.0% this year.

In all ASEAN member states, the levels of distrust towards China outstripped the trust levels. The distrust levels are most palpable in the Philippines (82.1%), Vietnam (75.4%), Thailand (67.9%), Indonesia (60.5%) and Myanmar (59.6%). Meanwhile, the share of distrust towards China in Cambodia – seen as China’s closest ally in the region – has dropped from 53.8% in 2020 to 42.3% in 2021.

Among the respondents who distrust China, 51.8% think that China’s economic and military power could be used to threaten their country’s interest and sovereignty. This view is more acutely felt in the Philippines (74.5%), Brunei (73.3%), Cambodia (63.6%), Singapore (58.9%) and Myanmar (57.0%). Also, in this cohort, 24.0% distrust China because they think that China is not a reliable partner.

Among those who trust China, 64.1% attribute this to China’s “vast economic resources and strong political will to provide global leadership”, and 14.7% do it out of respect for Chinese civilisation and culture. In this cohort, only 8.8% trust China because they think that “China is a responsible stakeholder that respects and champions international law”, and a very tiny segment (2.9%) trust China out of the consideration that “its military is an asset for global peace and security”.



### Q40 How confident are you that China will "do the right thing" to contribute to global peace, security, prosperity, and governance?

Country	No confidence		Little confidence		No comment		Confident		Very confident	
	2020	2021	2020	2021	2020	2021	2020	2021	2020	2021
ASEAN	18.7%	26.0%	41.7%	37.0%	23.5%	20.5%	14.3%	15.0%	1.8%	1.5%
Brunei	9.3%	6.1%	35.0%	39.4%	36.1%	30.3%	17.5%	24.2%	2.1%	0.0%
Cambodia	3.8%	7.7%	50.0%	34.6%	7.7%	30.8%	38.5%	23.1%	0.0%	3.8%
Indonesia	11.5%	23.3%	58.8%	37.2%	17.5%	23.3%	12.2%	15.5%	0.0%	0.8%
Laos	8.7%	15.0%	21.8%	32.5%	30.4%	22.5%	26.1%	27.5%	13.0%	2.5%
Malaysia	13.5%	16.2%	37.4%	41.9%	24.5%	16.2%	21.5%	22.2%	3.1%	3.4%
Myanmar	21.7%	26.3%	29.1%	33.3%	36.5%	28.2%	11.5%	11.5%	1.2%	0.6%
Philippines	28.5%	34.3%	50.4%	47.8%	11.0%	7.5%	9.5%	7.5%	0.7%	3.0%
Singapore	10.4%	12.7%	48.6%	44.3%	19.4%	19.6%	19.4%	21.5%	2.2%	1.9%
Thailand	21.9%	26.7%	40.6%	41.2%	20.8%	16.0%	15.6%	14.5%	1.1%	1.5%
Vietnam	38.2%	51.4%	38.8%	24.0%	19.7%	20.0%	1.3%	4.6%	2.0%	0.0%

## Q41 Why do you trust China?

Answered: 170 (Respondents who chose the "Confident" and "Very confident" options in Q40)

Country	China has vast economic resources and strong political will to provide global leadership		China is a responsible stakeholder that respects and champions international law		China's military power is an asset for global peace and security		I respect China and admire its civilisation and culture		My country's political culture and worldview are compatible with China's	
	2020	2021	2020	2021	2020	2021	2020	2021	2020	2021
ASEAN	52.4%	64.1%	10.5%	8.8%	7.6%	2.9%	18.1%	14.7%	11.4%	9.4%
Brunei	57.9%	100.0%	5.3%	0.0%	10.5%	0.0%	21.0%	0.0%	5.3%	0.0%
Cambodia	50.0%	57.1%	0.0%	0.0%	0.0%	14.3%	20.0%	0.0%	30.0%	28.6%
Indonesia	44.4%	61.9%	22.2%	14.3%	11.1%	4.8%	16.7%	14.3%	5.6%	4.8%
Laos	55.6%	83.3%	0.0%	8.3%	0.0%	0.0%	11.1%	0.0%	33.3%	8.3%
Malaysia	55.0%	63.3%	5.0%	3.3%	7.5%	3.3%	22.5%	13.3%	10.0%	16.7%
Myanmar	67.7%	73.7%	9.7%	0.0%	3.2%	0.0%	6.5%	21.1%	12.9%	5.3%
Philippines	43.0%	57.1%	7.1%	0.0%	21.4%	0.0%	21.4%	42.9%	7.1%	0.0%
Singapore	47.9%	62.2%	16.7%	13.5%	6.3%	2.7%	20.8%	13.5%	8.3%	8.1%
Thailand	50.0%	52.4%	6.2%	19.0%	0.0%	4.8%	25.0%	9.5%	18.8%	14.3%
Vietnam	20.0%	37.5%	40.0%	12.5%	40.0%	0.0%	0.0%	50.0%	0.0%	0.0%

## Q42 Why do you distrust China?

Answered: 650 (Respondents who chose the "Little confidence" and "No confidence" options in Q40)

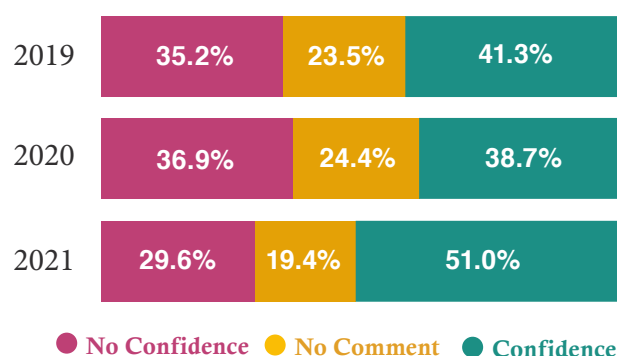
Country	China does not have the capacity or political will for global leadership		China's economic and military power could be used to threaten my country's interest and sovereignty		I am concerned that China is distracted with its internal affairs and thus cannot focus on global concerns and issues		I do not consider China a reliable power		My country's political culture and worldview are incompatible with China's	
	2020	2021	2020	2021	2020	2021	2020	2021	2020	2021
ASEAN	9.5%	9.1%	53.5%	51.8%	8.4%	8.6%	19.1%	24.0%	9.5%	6.5%
Brunei	7.0%	13.3%	55.8%	73.3%	18.6%	13.3%	7.0%	0.0%	11.6%	0.0%
Cambodia	14.3%	0.0%	71.4%	63.6%	0.0%	9.1%	14.3%	18.2%	0.0%	9.1%
Indonesia	14.4%	14.1%	30.8%	48.7%	19.2%	11.5%	20.2%	14.1%	15.4%	11.5%
Laos	28.7%	15.8%	57.0%	36.8%	14.3%	26.3%	0.0%	15.8%	0.0%	5.3%
Malaysia	4.8%	11.8%	62.7%	50.0%	9.6%	11.8%	8.4%	17.6%	14.5%	8.8%
Myanmar	12.9%	8.6%	59.7%	57.0%	6.4%	10.8%	13.7%	16.1%	7.3%	7.5%
Philippines	4.6%	1.8%	73.2%	74.5%	2.8%	3.6%	8.3%	14.5%	11.1%	5.5%
Singapore	8.4%	6.7%	42.8%	58.9%	6.1%	2.2%	30.5%	23.3%	12.2%	8.9%
Thailand	13.3%	12.4%	43.3%	37.1%	13.4%	16.9%	25.0%	28.1%	5.0%	5.6%
Vietnam	7.7%	6.8%	56.4%	45.5%	2.6%	1.5%	31.6%	44.7%	1.7%	1.5%

## The EU

The EU's trust rating has received a strong boost in the region. The number of respondents having confidence in the EU to "do the right thing" has increased remarkably from 38.7% last year to 51.0% this year while the share of distrust has dropped from 36.9% to 29.6%. The highest levels of trust towards the EU are found in the Philippines (62.6%), Indonesia (59.7%), Thailand (57.2%), Malaysia (55.6%) and Vietnam (54.9%). Laos in particular sees a big jump in its trust towards the EU from 21.7% to 45.0% whereas Myanmar is the only country where the trust level (37.2%) is lower than the distrust level (39.7%).

The region's generally positive disposition towards the EU is largely attributed to its leadership in championing human rights and climate change which is considered an asset for global peace and security (43.5%). This view is strongly shared by respondents from Thailand (54.7%), Indonesia (53.2%) and the Philippines (52.4%), but is not so well received in Vietnam (22.9%). The biggest reason for Vietnamese respondents to trust the EU is because they see the EU as "a responsible stakeholder that respects and champions international law".

In the cohort of EU sceptics, more than one third (38.7%) are concerned that the EU is distracted with its internal affairs and thus cannot focus on global concerns and issues. This concern is most pronounced in Vietnam (65.9%), Cambodia (50.0%), Malaysia (47.5%) and Singapore (44.6%). The second biggest reason for scepticism towards the EU is the concern that "the EU does not have the capacity or political will for global leadership" (25.9%).



### Q43 How confident are you that the EU will "do the right thing" to contribute to global peace, security, prosperity, and governance?

Country	No confidence		Little confidence		No comment		Confident		Very confident	
	2020	2021	2020	2021	2020	2021	2020	2021	2020	2021
ASEAN	6.6%	3.4%	30.3%	26.2%	24.4%	19.4%	34.0%	44.0%	4.7%	7.0%
Brunei	7.2%	3.0%	29.9%	27.3%	35.1%	33.3%	24.7%	36.4%	3.1%	0.0%
Cambodia	3.9%	0.0%	42.3%	30.8%	15.3%	26.9%	34.6%	42.3%	3.9%	0.0%
Indonesia	3.4%	3.1%	27.7%	20.9%	16.2%	16.3%	48.7%	51.2%	4.0%	8.5%
Laos	17.4%	10.0%	26.1%	15.0%	34.8%	30.0%	21.7%	42.5%	0.0%	2.5%
Malaysia	6.8%	1.7%	33.7%	32.5%	17.8%	10.3%	36.2%	41.9%	5.5%	13.7%
Myanmar	13.5%	8.3%	30.7%	31.4%	33.2%	23.1%	20.1%	35.3%	2.5%	1.9%
Philippines	3.7%	1.5%	24.8%	22.4%	17.5%	13.4%	43.8%	50.7%	10.2%	11.9%
Singapore	4.0%	1.9%	33.3%	33.5%	23.9%	19.0%	33.8%	38.0%	5.0%	7.6%
Thailand	5.2%	3.1%	26.0%	20.6%	24.0%	19.1%	38.5%	47.3%	6.3%	9.9%
Vietnam	4.6%	1.7%	30.3%	21.7%	25.6%	21.7%	36.2%	50.3%	3.3%	4.6%

## Q44 Why do you trust the EU?

Answered: 526 (Respondents who chose the "Confident" and "Very confident" options in Q43)

Country	The EU has vast economic resources and the political will to provide global leadership		My country's political culture and worldview are compatible with the EU's		The EU is a responsible stakeholder that respects and champions international law		I respect Europe and admire its civilisation and culture		The EU's military power is an asset for global peace and security		The EU's stance on environment, human rights, and climate change is an asset for global peace and security	
	2020	2021	2020	2021	2020	2021	2020	2021	2020	2021	2020	2021
ASEAN	14.8%	13.1%	3.8%	2.1%	68.0%	36.1%	9.3%	5.1%	4.1%	N.A.	N.A.	43.5%
Brunei	25.9%	0.0%	0.0%	0.0%	63.0%	58.3%	7.4%	0.0%	3.7%	N.A.	N.A.	41.7%
Cambodia	20.0%	18.2%	10.0%	0.0%	50.0%	36.4%	20.0%	0.0%	0.0%	N.A.	N.A.	45.5%
Indonesia	16.7%	14.3%	1.3%	1.3%	67.9%	24.7%	9.0%	6.5%	5.1%	N.A.	N.A.	53.2%
Laos	60.0%	33.3%	0.0%	5.6%	40.0%	16.7%	0.0%	5.6%	0.0%	N.A.	N.A.	38.9%
Malaysia	7.3%	9.2%	5.9%	1.5%	75.0%	40.0%	10.3%	3.1%	1.5%	N.A.	N.A.	46.2%
Myanmar	27.3%	24.1%	1.8%	3.4%	50.9%	22.4%	10.9%	8.6%	9.1%	N.A.	N.A.	41.4%
Philippines	17.5%	9.5%	6.8%	0.0%	58.1%	31.0%	6.8%	7.1%	10.8%	N.A.	N.A.	52.4%
Singapore	3.5%	2.8%	2.3%	1.4%	86.1%	47.2%	5.8%	4.2%	2.3%	N.A.	N.A.	44.4%
Thailand	16.3%	8.0%	2.3%	4.0%	72.1%	30.7%	9.3%	2.7%	0.0%	N.A.	N.A.	54.7%
Vietnam	11.7%	18.8%	6.7%	2.1%	66.6%	50.0%	15.0%	6.3%	0.0%	N.A.	N.A.	22.9%

## Q45 Why do you distrust the EU?

Answered: 305 (Respondents who chose the "Little confidence" and "No confidence" options in Q43)

Country	I am concerned that the EU is distracted with its internal affairs and thus cannot focus on global concerns and issues		I do not consider the EU a reliable power		My country's political culture and worldview are incompatible with the EU's		The EU does not have the capacity or political will for global leadership		The EU's stance on environment, human rights, and climate change could be used to threaten my country's interest and sovereignty		The EU's economic and military power could be used to threaten my country's interest and sovereignty	
	2020	2021	2020	2021	2020	2021	2020	2021	2020	2021	2020	2021
ASEAN	35.4%	38.7%	10.8%	10.8%	16.6%	9.5%	33.7%	25.9%	N.A.	15.1%	3.5%	N.A.
Brunei	30.6%	30.0%	13.9%	10.0%	27.8%	10.0%	19.4%	10.0%	N.A.	40.0%	8.3%	N.A.
Cambodia	16.7%	50.0%	8.3%	25.0%	16.7%	12.5%	58.3%	12.5%	N.A.	0.0%	0.0%	N.A.
Indonesia	54.4%	38.7%	13.0%	9.7%	15.2%	12.9%	15.2%	19.4%	N.A.	19.4%	2.2%	N.A.
Laos	30.0%	30.0%	10.0%	20.0%	20.0%	10.0%	30.0%	30.0%	N.A.	10.0%	10.0%	N.A.
Malaysia	33.4%	47.5%	13.6%	7.5%	13.6%	10.0%	37.9%	20.0%	N.A.	15.0%	1.5%	N.A.
Myanmar	15.8%	12.9%	14.8%	22.6%	28.7%	17.7%	33.3%	22.6%	N.A.	24.2%	7.4%	N.A.
Philippines	38.5%	37.5%	12.8%	12.5%	20.5%	18.8%	28.2%	12.5%	N.A.	18.8%	0.0%	N.A.
Singapore	42.2%	44.6%	6.0%	5.4%	1.2%	0.0%	50.6%	44.6%	N.A.	5.4%	0.0%	N.A.
Thailand	36.7%	35.5%	10.0%	3.2%	16.7%	9.7%	30.0%	38.7%	N.A.	12.9%	6.6%	N.A.
Vietnam	56.6%	65.9%	1.9%	4.9%	9.4%	2.4%	30.2%	17.1%	N.A.	9.8%	1.9%	N.A.

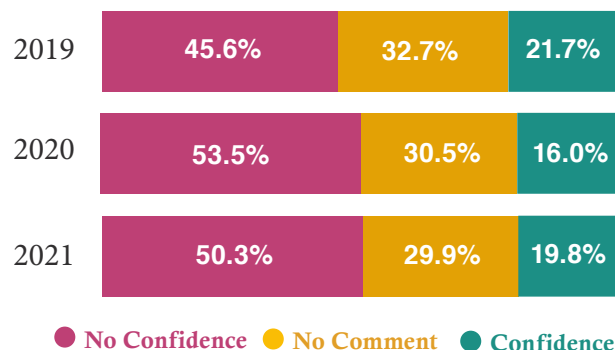


## India

More than half of the respondents have either “no confidence” or “little confidence” in India (50.3%), a slight drop from 53.5% in the 2020 survey. Doubts about India are most prevalent in Malaysia (67.5%), Singapore (64.5%), Brunei (60.6%) and Indonesia (60.5%). The strongest support for India is found among respondents from Myanmar (37.1%), Vietnam (31.4%) and the Philippines (29.9%). Cambodia and Myanmar have the most significant shift in perceptions towards India. Cambodia’s distrust level decreased from 76.9% in 2020 to 57.7% in 2021 while the trust level rose from 7.7% to 15.3%. Myanmar’s positive view of India increased from 19.7% to 37.1% while the negative view decreased from 38.5% to 32.7%.

Among the respondents who do not trust India, 39.7% of the respondents are equally split between those who think “India is distracted with its internal and sub-continental affairs and thus cannot focus on global concerns and issues” and those who view “India does not have the

capacity or political will for global leadership”. The former view is widely shared among respondents from Singapore (52.0%) Brunei (50.0%) and Malaysia (46.8%) whereas respondents from Cambodia (60.0%), Indonesia (48.7%), Vietnam (48.4%), Thailand (46.0%) and Myanmar (45.1%) strongly agree with the latter view.



### Q46 How confident are you that India will "do the right thing" to contribute to global peace, security, prosperity, and governance?

Country	No confidence		Little confidence		No comment		Confident		Very confident	
	2020	2021	2020	2021	2020	2021	2020	2021	2020	2021
ASEAN	16.0%	14.8%	37.5%	35.5%	30.5%	29.9%	14.6%	18.3%	1.4%	1.5%
Brunei	15.5%	9.1%	36.1%	51.5%	38.1%	30.3%	10.3%	9.1%	0.0%	0.0%
Cambodia	23.1%	15.4%	53.8%	42.3%	15.4%	26.9%	7.7%	11.5%	0.0%	3.8%
Indonesia	20.2%	20.2%	44.6%	40.3%	23.0%	29.5%	11.5%	10.1%	0.7%	0.0%
Laos	30.4%	22.5%	13.0%	27.5%	43.5%	37.5%	13.1%	12.5%	0.0%	0.0%
Malaysia	25.2%	26.5%	42.3%	41.0%	20.3%	19.7%	11.0%	10.3%	1.2%	2.6%
Myanmar	9.4%	5.1%	29.1%	27.6%	41.8%	30.1%	17.2%	36.5%	2.5%	0.6%
Philippines	2.9%	7.5%	32.9%	35.8%	31.4%	26.9%	29.9%	25.4%	2.9%	4.5%
Singapore	23.0%	19.6%	44.1%	44.9%	24.3%	25.3%	7.7%	8.9%	0.9%	1.3%
Thailand	18.8%	16.0%	37.5%	32.1%	33.3%	40.5%	10.4%	10.7%	0.0%	0.8%
Vietnam	9.8%	8.6%	34.9%	26.9%	32.9%	33.1%	20.4%	29.1%	2.0%	2.3%



## Q47 Why do you trust India?

Answered: 204 (Respondents who chose the "Confident" and "Very confident" options in Q46)

Country	I respect India and admire its civilisation and culture		India has vast economic resources and the political will to provide global leadership		India is a responsible stakeholder that respects and champions international law		India's military power is an asset for global peace and security		My country's political culture and worldview are compatible with India's	
	2020	2021	2020	2021	2020	2021	2020	2021	2020	2021
ASEAN	22.0%	17.2%	23.9%	17.6%	31.1%	37.3%	7.7%	9.8%	15.3%	18.1%
Brunei	20.0%	0.0%	40.0%	66.7%	20.0%	0.0%	10.0%	33.3%	10.0%	0.0%
Cambodia	0.0%	50.0%	50.0%	50.0%	50.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Indonesia	16.7%	30.8%	27.8%	30.8%	16.7%	15.4%	11.0%	7.7%	27.8%	15.4%
Laos	0.0%	40.0%	66.7%	0.0%	33.3%	0.0%	0.0%	40.0%	0.0%	20.0%
Malaysia	20.0%	20.0%	25.0%	20.0%	35.0%	33.3%	5.0%	13.3%	15.0%	13.3%
Myanmar	35.4%	19.0%	25.0%	22.4%	20.8%	24.1%	2.1%	3.4%	16.7%	31.0%
Philippines	24.5%	30.0%	22.2%	15.0%	22.2%	25.0%	17.8%	20.0%	13.3%	10.0%
Singapore	10.5%	6.3%	10.5%	0.0%	68.5%	75.0%	10.5%	6.3%	0.0%	12.5%
Thailand	50.0%	26.7%	20.0%	33.3%	0.0%	20.0%	0.0%	6.7%	30.0%	13.3%
Vietnam	5.9%	3.6%	20.6%	7.3%	52.9%	63.6%	2.9%	10.9%	17.7%	14.5%

## Q48 Why do you distrust India?

Answered: 519 (Respondents who chose the "Little confidence" and "No confidence" options in Q46)

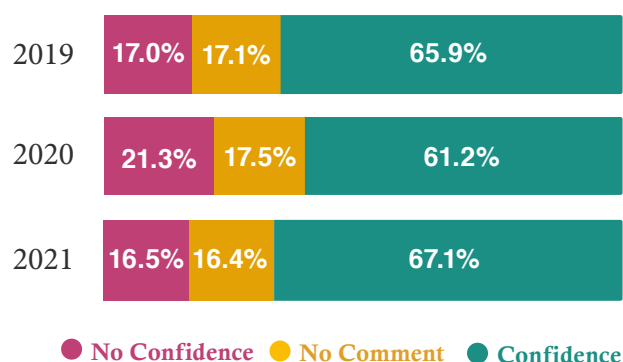
Country	I am concerned that India is distracted with its internal and sub-continental affairs and thus cannot focus on global concerns and issues		I do not consider India a reliable power		India does not have the capacity or political will for global leadership		India's economic and military power could be used to threaten my country's interest and sovereignty		My country's political culture and worldview are incompatible with India's	
	2020	2021	2020	2021	2020	2021	2020	2021	2020	2021
ASEAN	38.3%	39.7%	13.6%	16.4%	41.6%	39.7%	2.5%	1.7%	4.0%	2.5%
Brunei	50.0%	50.0%	16.0%	20.0%	24.0%	25.0%	2.0%	5.0%	8.0%	0.0%
Cambodia	15.0%	13.3%	20.0%	26.7%	60.0%	60.0%	0.0%	0.0%	5.0%	0.0%
Indonesia	31.2%	41.0%	15.6%	9.0%	46.9%	48.7%	2.1%	0.0%	4.2%	1.3%
Laos	10.0%	20.0%	10.0%	20.0%	80.0%	40.0%	0.0%	15.0%	0.0%	5.0%
Malaysia	49.1%	46.8%	11.8%	16.5%	33.7%	34.2%	3.6%	1.3%	1.8%	1.3%
Myanmar	26.6%	31.4%	14.9%	15.7%	41.5%	45.1%	8.5%	3.9%	8.5%	3.9%
Philippines	38.8%	34.5%	14.3%	10.3%	40.8%	37.9%	0.0%	0.0%	6.1%	17.2%
Singapore	48.3%	52.0%	12.7%	21.6%	38.3%	25.5%	0.0%	0.0%	0.7%	1.0%
Thailand	38.9%	28.6%	14.8%	22.2%	38.9%	46.0%	1.8%	1.6%	5.6%	1.6%
Vietnam	26.5%	38.7%	8.8%	9.7%	58.9%	48.4%	2.9%	1.6%	2.9%	1.6%

# Japan

Japan remains the most trusted major power in the region with the overall trust level increasing from 61.2% in 2020 to 67.1% in 2021 while the distrust level dropped from 21.3% to 16.5%. Japan is most trusted in Cambodia (84.6%), the Philippines (80.6%) and Myanmar (76.3%). The largest swing in perceptions towards Japan is found in Cambodia and Laos. Cambodia's distrust level towards Japan decreased from 23.0% in 2020 to 3.8% in 2021 while the trust level increased from 69.3% to 84.6%. Laos' negative view towards Japan decreased from 26.0% to 15.0% and its positive view increased from 39.2% to 60.0%.

Among the respondents who trust Japan, 51.6% view it as a “responsible stakeholder that respects and champions international law”. This view is widely shared in Brunei (77.3%), Singapore (73.1%), Malaysia (59.4%) and Vietnam (57.3%). Nearly a quarter (23.6%) of this cohort think that “Japan has vast economic resources and the political will to provide global leadership”. Japanese culture and civilisation also have a strong appeal to respondents from Indonesia (28.8%), the Philippines (22.2%) and Myanmar (21.8%).

48.0% in the distrust cohort think that “Japan does not have the capacity or political will for global leadership” and 32.7% see that “Japan is distracted with its internal affairs and relations with its Northeast Asian neighbours (i.e. China and Korea), and thus cannot focus on global concerns and issues”. These are the two persistent concerns of the region towards Japan’s leadership as they also featured prominently in the 2020 survey.



## Q49 How confident are you that Japan will "do the right thing" to contribute to global peace, security, prosperity, and governance?

Country	No confidence		Little confidence		No comment		Confident		Very confident	
	2020	2021	2020	2021	2020	2021	2020	2021	2020	2021
ASEAN	3.0%	1.9%	18.3%	14.6%	17.5%	16.4%	50.1%	53.4%	11.1%	13.7%
Brunei	1.0%	0.0%	13.4%	15.2%	21.7%	18.2%	53.6%	63.6%	10.3%	3.0%
Cambodia	0.0%	0.0%	23.0%	3.8%	7.7%	11.5%	65.4%	53.8%	3.9%	30.8%
Indonesia	4.7%	3.9%	18.9%	18.6%	16.2%	20.9%	51.4%	51.2%	8.8%	5.4%
Laos	4.4%	2.5%	21.6%	12.5%	34.8%	25.0%	34.8%	40.0%	4.4%	20.0%
Malaysia	3.1%	2.6%	22.1%	23.9%	18.4%	14.5%	45.4%	48.7%	11.0%	10.3%
Myanmar	3.3%	2.6%	17.6%	8.3%	20.5%	12.8%	45.5%	57.7%	13.1%	18.6%
Philippines	2.2%	0.0%	6.6%	9.0%	6.6%	10.4%	59.1%	58.2%	25.5%	22.4%
Singapore	3.6%	1.3%	23.9%	17.7%	15.3%	22.2%	50.0%	47.5%	7.2%	11.4%
Thailand	3.1%	2.3%	17.7%	19.8%	24.0%	13.0%	49.0%	51.1%	6.2%	13.7%
Vietnam	2.0%	1.1%	19.7%	8.6%	18.4%	15.4%	51.3%	60.6%	8.6%	14.3%

## Q50 Why do you trust Japan?

Answered: 692 (Respondents who chose the "Confident" and "Very confident" options in Q49)

Country	Japan has vast economic resources and the political will to provide global leadership		My country's political culture and worldview are compatible with Japan's		Japan is a responsible stakeholder that respects and champions international law		Japan's military power is an asset for global peace and security		I respect Japan and admire its civilisation and culture	
	2020	2021	2020	2021	2020	2021	2020	2021	2020	2021
ASEAN	18.5%	23.6%	5.8%	5.9%	51.0%	51.6%	1.5%	1.7%	23.2%	17.2%
Brunei	19.4%	18.2%	3.2%	0.0%	54.8%	77.3%	0.0%	0.0%	22.6%	4.5%
Cambodia	22.2%	27.3%	5.6%	4.5%	50.0%	45.5%	0.0%	0.0%	22.2%	22.7%
Indonesia	14.6%	23.3%	7.9%	6.8%	48.3%	38.4%	1.1%	2.7%	28.1%	28.8%
Laos	44.5%	33.3%	0.0%	8.3%	22.2%	41.7%	0.0%	0.0%	33.3%	16.7%
Malaysia	21.7%	18.8%	10.9%	5.8%	47.8%	59.4%	0.0%	2.9%	19.6%	13.0%
Myanmar	22.4%	31.1%	4.2%	8.4%	40.5%	37.8%	0.0%	0.8%	32.9%	21.8%
Philippines	31.0%	25.9%	4.3%	3.7%	35.4%	44.4%	5.2%	3.7%	24.1%	22.2%
Singapore	8.6%	12.9%	1.6%	7.5%	72.4%	73.1%	2.4%	1.1%	15.0%	5.4%
Thailand	13.2%	25.9%	5.7%	5.9%	56.6%	45.9%	3.8%	2.4%	20.7%	20.0%
Vietnam	9.9%	22.9%	11.0%	3.8%	60.4%	57.3%	0.0%	1.5%	18.7%	14.5%

## Q51 Why do you distrust Japan?

Answered: 171 (Respondents who chose the "Little confidence" and "No confidence" options in Q49)

Country	Japan does not have the capacity or political will for global leadership		My country's political culture and worldview are incompatible with Japan's		I am concerned that Japan is distracted with its internal affairs and relations with its Northeast Asian neighbours (i.e. China and Korea), and thus cannot focus on global concerns and issues		Japan's economic and military power could be used to threaten my country's interest and sovereignty		I do not consider Japan a reliable power	
	2020	2021	2020	2021	2020	2021	2020	2021	2020	2021
ASEAN	49.5%	48.0%	6.4%	1.8%	26.9%	32.7%	5.0%	2.3%	12.2%	15.2%
Brunei	50.0%	60.0%	7.1%	0.0%	28.7%	40.0%	7.1%	0.0%	7.1%	0.0%
Cambodia	66.6%	0.0%	16.7%	0.0%	16.7%	0.0%	0.0%	0.0%	0.0%	100.0%
Indonesia	57.1%	48.3%	2.9%	0.0%	17.2%	27.6%	5.7%	0.0%	17.1%	24.1%
Laos	66.7%	66.7%	33.3%	0.0%	0.0%	33.3%	0.0%	0.0%	0.0%	0.0%
Malaysia	48.8%	48.4%	4.9%	0.0%	29.2%	32.3%	4.9%	0.0%	12.2%	19.4%
Myanmar	49.0%	52.9%	11.8%	5.9%	15.7%	11.8%	3.9%	5.9%	19.6%	23.5%
Philippines	25.0%	16.7%	16.7%	0.0%	33.3%	66.7%	8.3%	0.0%	16.7%	16.7%
Singapore	52.5%	43.3%	1.6%	0.0%	31.2%	40.0%	4.9%	6.7%	9.8%	10.0%
Thailand	35.0%	51.7%	5.0%	3.4%	40.0%	37.9%	10.0%	0.0%	10.0%	6.9%
Vietnam	48.5%	47.1%	3.0%	5.9%	39.4%	29.4%	3.0%	5.9%	6.1%	11.8%

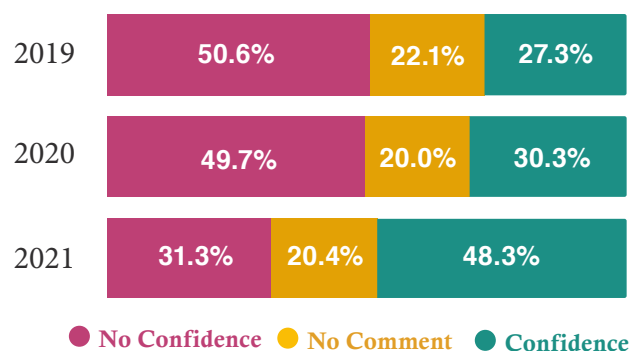
## The US

The reservoir of trust in the region towards Washington is surprisingly resilient even though the past year has been extremely difficult for the US with the raging COVID-19 pandemic, the worst economic depression since the 1930s, its deeply divided society and its wounded democracy. The region's trust in the US has consistently improved from 27.3% in 2019 to 30.3% in 2020 and 48.3% in 2021. The share of distrust also decreased significantly from 49.7% in 2020 to 31.3% in 2021.

Confidence in the US is highest among respondents from the Philippines (62.6%), Vietnam (60.6%) and Singapore (51.9%), while US sceptics abound in Thailand (45.0%), Malaysia (40.2%) and Laos (40.0%). The most pronounced shift in perceptions towards Washington is found in Brunei and Indonesia. Brunei's trust towards the US increased from 15.5% in 2020 to 48.5% in 2021 while the distrust share dropped from 55.6% to 36.4%. In Indonesia, the level of trust climbed up from 20.3% to 48.1%, and the level of distrust dwindled from 60.8% to 32.6%.

Among those who trust the US, around half (50.3%) believe that "the US has vast economic resources and the political will to provide global leadership". This view is widely shared among respondents from Cambodia (58.3%),

Vietnam (56.6%), Indonesia (56.5%) and Thailand (54.9%). Meanwhile, 26.7% of this group agree that "the US military power is an asset for global peace and security". Among those who distrust the US, 42.1% think that the US is distracted with its internal affairs and thus cannot focus on global concerns and issues. In last year's survey, the respondents who shared this concern accounted for almost the same percentage (42.8%).



## Q52 How confident are you that the US will "do the right thing" to contribute to global peace, security, prosperity, and governance?

Country	No confidence		Little confidence		No comment		Confident		Very confident	
	2020	2021	2020	2021	2020	2021	2020	2021	2020	2021
ASEAN	12.8%	6.0%	36.9%	25.3%	20.0%	20.4%	26.2%	43.5%	4.1%	4.8%
Brunei	14.4%	9.1%	41.2%	27.3%	28.9%	15.2%	13.4%	48.5%	2.1%	0.0%
Cambodia	11.5%	0.0%	42.3%	15.4%	11.5%	38.5%	34.7%	42.3%	0.0%	3.8%
Indonesia	10.1%	6.2%	50.7%	26.4%	18.9%	19.4%	20.3%	44.2%	0.0%	3.9%
Laos	21.7%	10.0%	17.4%	30.0%	39.1%	35.0%	17.4%	25.0%	4.4%	0.0%
Malaysia	20.9%	12.8%	38.0%	27.4%	17.2%	12.0%	19.6%	39.3%	4.3%	8.5%
Myanmar	22.1%	7.1%	26.6%	26.9%	22.6%	26.3%	23.4%	36.5%	5.3%	3.2%
Philippines	4.4%	1.5%	26.3%	19.4%	13.9%	16.4%	47.4%	50.7%	8.0%	11.9%
Singapore	8.1%	3.2%	49.1%	27.2%	17.6%	17.7%	22.5%	48.1%	2.7%	3.8%
Thailand	16.7%	9.9%	44.8%	35.1%	18.7%	16.0%	19.8%	35.9%	0.0%	3.1%
Vietnam	1.3%	1.1%	24.4%	14.9%	23.0%	23.4%	42.1%	54.3%	9.2%	6.3%

## Q53 Why do you trust the US?

Answered: 499 (Respondents who chose the "Confident" and "Very confident" options in Q52)

Country	I respect the US and admire its civilisation and culture		My country's political culture and worldview are compatible with the US		The US has vast economic resources and the political will to provide global leadership		The US is a responsible stakeholder that respects and champions international law		The US military power is an asset for global peace and security	
	2020	2021	2020	2021	2020	2021	2020	2021	2020	2021
ASEAN	5.3%	2.6%	4.5%	3.6%	44.3%	50.3%	15.4%	16.8%	30.5%	26.7%
Brunei	6.7%	0.0%	0.0%	0.0%	33.3%	50.0%	33.3%	12.5%	26.7%	37.5%
Cambodia	11.1%	0.0%	0.0%	0.0%	22.2%	58.3%	22.2%	16.7%	44.5%	25.0%
Indonesia	6.7%	0.0%	0.0%	3.2%	43.3%	56.5%	13.3%	16.1%	36.7%	24.2%
Laos	0.0%	0.0%	0.0%	0.0%	60.0%	50.0%	20.0%	10.0%	20.0%	40.0%
Malaysia	7.7%	1.8%	0.0%	3.6%	38.5%	48.2%	15.3%	32.1%	38.5%	14.3%
Myanmar	8.6%	1.6%	2.8%	1.6%	44.3%	51.6%	18.6%	9.7%	25.7%	35.5%
Philippines	2.6%	4.8%	14.5%	9.5%	35.5%	47.6%	14.5%	16.7%	32.9%	21.4%
Singapore	3.6%	3.7%	1.8%	8.5%	28.6%	35.4%	19.6%	19.5%	46.4%	32.9%
Thailand	5.3%	0.0%	10.5%	0.0%	31.6%	54.9%	15.8%	13.7%	36.8%	31.4%
Vietnam	3.8%	5.7%	2.6%	1.9%	74.4%	56.6%	6.4%	14.2%	12.8%	21.7%

## Q54 Why do you distrust the US?

Answered: 323 (Respondents who chose the "Little confidence" and "No confidence" options in Q52)

Country	The US does not have the capacity or political will for global leadership		My country's political culture and worldview are incompatible with the US		I am concerned that the US is distracted with its internal affairs and thus cannot focus on global concerns and issues		The US economic and military power could be used to threaten my country's interest and sovereignty		I do not consider the US a reliable power	
	2020	2021	2020	2021	2020	2021	2020	2021	2020	2021
ASEAN	7.1%	5.3%	9.2%	8.7%	42.8%	42.1%	21.8%	24.1%	19.1%	19.8%
Brunei	7.4%	0.0%	9.3%	0.0%	33.3%	66.7%	31.5%	8.3%	18.5%	25.0%
Cambodia	0.0%	0.0%	21.4%	0.0%	21.4%	0.0%	28.6%	75.0%	28.6%	25.0%
Indonesia	6.7%	4.8%	6.7%	7.1%	50.0%	28.6%	28.9%	47.6%	7.7%	11.9%
Laos	11.1%	12.5%	55.6%	12.5%	0.0%	31.3%	33.3%	25.0%	0.0%	18.8%
Malaysia	9.4%	4.3%	1.0%	10.6%	36.4%	40.4%	29.2%	23.4%	24.0%	21.3%
Myanmar	5.9%	9.4%	26.9%	28.3%	23.5%	13.2%	27.7%	17.0%	16.0%	32.1%
Philippines	4.8%	7.1%	0.0%	0.0%	59.5%	57.1%	9.5%	21.4%	26.2%	14.3%
Singapore	9.5%	4.2%	3.2%	0.0%	59.8%	77.1%	5.5%	8.3%	22.0%	10.4%
Thailand	5.1%	3.4%	0.0%	0.0%	44.1%	47.5%	25.4%	28.8%	25.4%	20.3%
Vietnam	5.1%	3.6%	10.3%	10.7%	56.4%	42.9%	10.3%	21.4%	17.9%	21.4%



## Trust and Distrust Rankings of Major Powers in the Region

The “trust” and “distrust” rankings of major powers in the region are based on a consolidated 5-point scale of positive (“confident” or “very confident”) and negative (“little confidence” or “no confidence”) responses to Questions 40, 43, 46, 49 and 52. “No comment” responses are removed in this analysis.

Japan continues to be the region’s most trusted major power in 2021 (67.1%), followed by the EU (51.0%), the US (48.3%), India (19.8%) and China (16.5%). Not only has Japan remained at the top of the trust rankings but it has also made a 5.9% gain from 2020. Its soft power in the region runs deep and strong even as Tokyo has not managed to bring the COVID-19 pandemic under control. Japan is seen as a responsible power that plays its part in upholding international law and one that could potentially fill the leadership vacuum in a region increasingly forced into taking sides between the US and China. Prime Minister Suga’s first overseas trip last year was to Southeast Asia (Vietnam and Indonesia), showcasing Tokyo’s steadfast commitment to remain engaged and invested in the region.

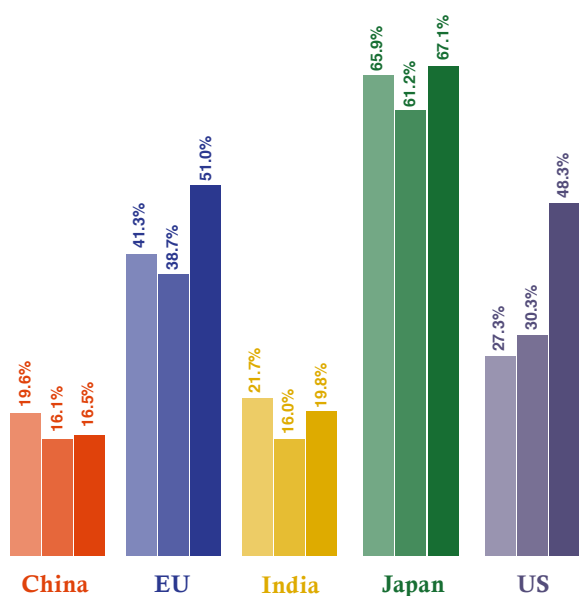
The EU has retained its position as the second most trusted power in the region and its rankings jumped from 38.7% in 2020 to 51.0% in 2021. The EU is widely viewed by many Southeast Asians as a reliable, stable and responsible power that champions the rule of law, global governance, free trade, sustainability and climate change. These areas provide an affirmative agenda for

the EU and ASEAN to promote global collective action and transcend the geo-politics of power rivalry. Now that the process of Brexit is officially over, the EU is expected to be less distracted on the continent.

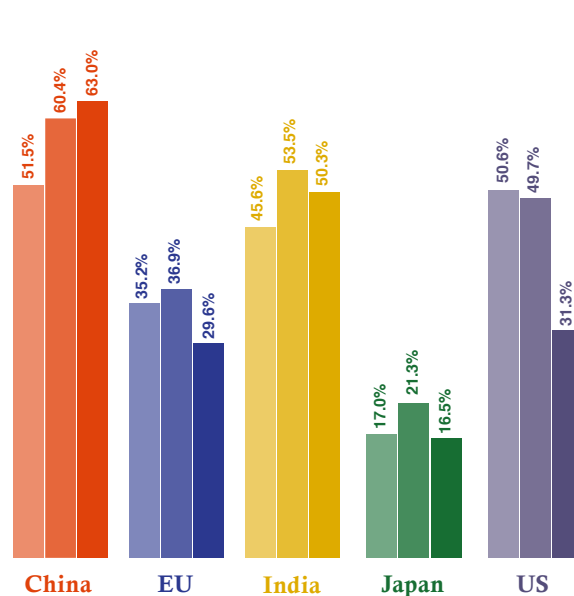
The region’s trust deficit in China is trending upwards. China is the only major power that has increased its negative ratings from 60.4% in 2020 to 63.0% in 2021. China’s predominant economic and political influence in the region has created more awe than affection. A minority of respondents trust China because they recognise its vast economic resources and Beijing’s political will to provide global leadership. Yet, the majority worry that such economic heft, combined with China’s military power, could be used to threaten their country’s interest and sovereignty. The region’s best hope is for China to take the mantle of leadership in a manner that does not impinge on the sovereignty and strategic autonomy of its neighbouring countries.

The US made a surprising turn-around with a 18.0% jump in positive ratings from 30.3% in 2020 to 48.3% in 2021. It has also reversed the trends in negative ratings from 49.7% in 2020 to 31.3% in 2021. This begs the question of why the sudden increase in trust towards Washington. Have the respondents left behind the past four years of dismal engagement with ASEAN under the Trump presidency, and turned more bullish as the Biden Administration takes over? Only time will tell if the region’s renewed trust in the US is misplaced or not.

Perception of Trust in the Major Powers among Southeast Asians



Perception of Distrust in the Major Powers among Southeast Asians



2019-2021

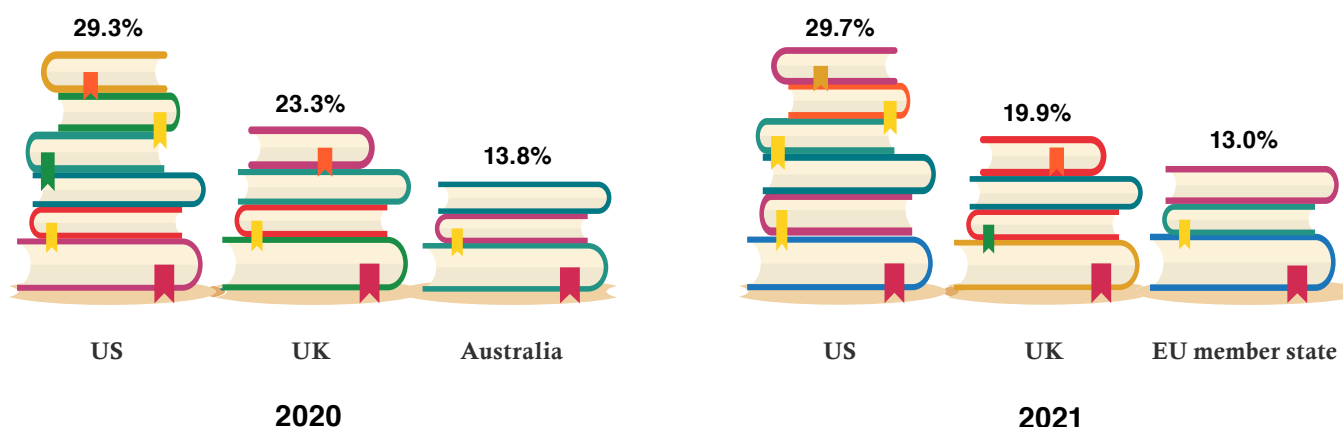


This final section gauges the extent of soft power in the region based on the choice of destination for tertiary education and for travel.

## Preference for Tertiary Education

The US remains the region's top preference for tertiary education (29.7%), followed by the UK (19.9%), the EU (13.0%), Japan (12.4%) and Australia (12.3%). This is the first time Japan made it to the top four in the region's favourite destinations for tertiary education. Only 3.7% of the respondents choose an ASEAN member state, which is exactly the same percentage as last year.

The US is the most popular destination for tertiary education among six ASEAN member states: Singapore (41.8%), Vietnam (33.7%), the Philippines (31.3%), Thailand (29.0%), Indonesia (27.1%) and Cambodia (26.9%). Japan is the most popular in Myanmar (32.1%) and Laos (25.0%). The top choice in Brunei (39.4%) and Malaysia (28.2%) is the UK.

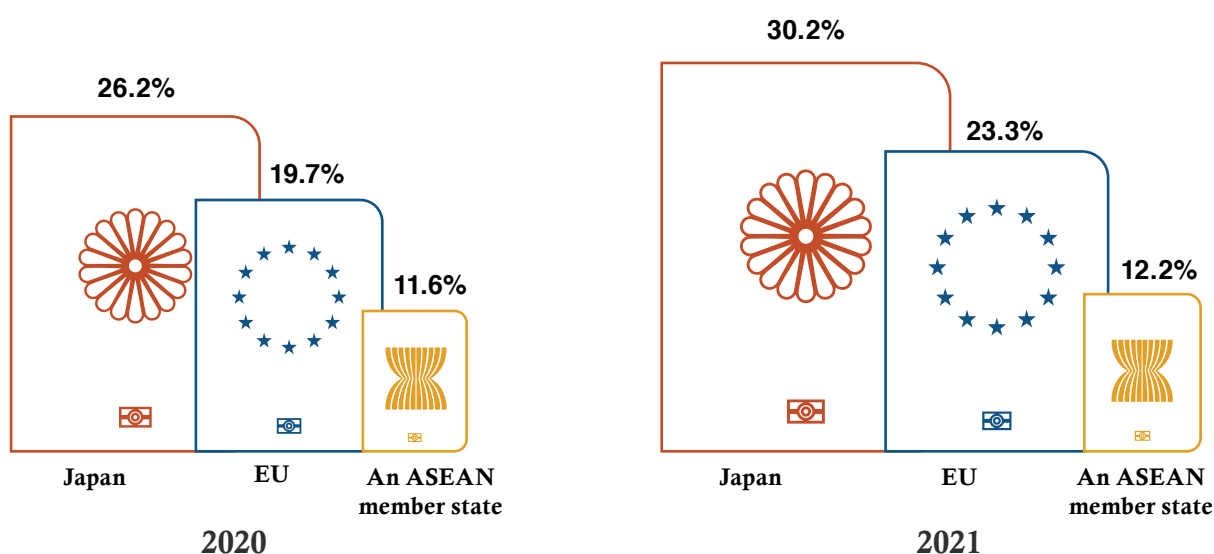


Q55 Which country would be your first choice if you (or your child) were offered a scholarship to a university?

Country	An ASEAN member state	Australia	China	India	An European Union member state	Japan	Republic of Korea	New Zealand	The United Kingdom	The United States
ASEAN	3.7%	12.3%	3.3%	0.3%	13.0%	12.4%	0.8%	4.7%	19.9%	29.7%
Brunei	9.1%	6.1%	6.1%	0.0%	0.0%	12.1%	3.0%	12.1%	39.4%	12.1%
Cambodia	11.5%	19.2%	3.8%	0.0%	7.7%	15.4%	0.0%	0.0%	15.4%	26.9%
Indonesia	2.3%	19.4%	1.6%	0.0%	19.4%	8.5%	0.8%	5.4%	15.5%	27.1%
Laos	7.5%	17.5%	5.0%	0.0%	7.5%	25.0%	0.0%	7.5%	10.0%	20.0%
Malaysia	4.3%	11.1%	2.6%	0.9%	11.1%	6.8%	2.6%	10.3%	28.2%	22.2%
Myanmar	0.0%	9.6%	0.6%	0.0%	10.3%	32.1%	0.0%	7.1%	13.5%	26.9%
Philippines	6.0%	6.0%	0.0%	0.0%	22.4%	16.4%	1.5%	3.0%	13.4%	31.3%
Singapore	1.9%	7.6%	8.9%	0.6%	8.9%	0.6%	0.0%	1.3%	28.5%	41.8%
Thailand	5.3%	6.9%	5.3%	0.8%	16.0%	10.7%	0.0%	3.8%	22.1%	29.0%
Vietnam	4.0%	20.0%	1.1%	0.0%	14.3%	8.6%	1.1%	1.7%	15.4%	33.7%

## Most Preferred Country to Visit

Japan remains the most popular destination to visit among Southeast Asians (30.2%), followed by the EU (23.3%) and an ASEAN member state (12.2%). Japan tops the list of travel destinations among respondents from seven ASEAN member states: Thailand (40.5%), the Philippines (38.8%), Singapore (36.1%), Laos (35.0%), Myanmar (28.2%), Brunei (27.3%) and Malaysia (23.1%). The EU is most preferred in Cambodia (46.2%), Indonesia (30.2%) and Vietnam (26.9%).

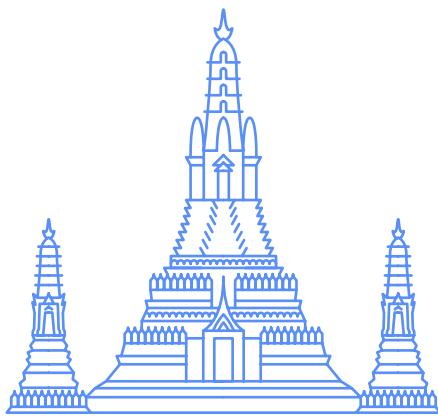


## Q56 Which country is your favourite holiday destination?

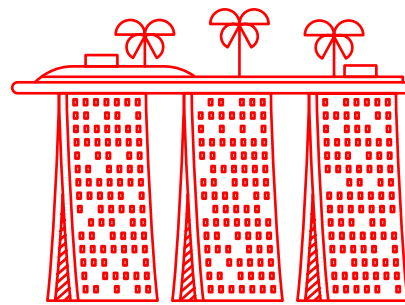
Country	An ASEAN member state	Australia	China	India	EU	Japan	Republic of Korea	New Zealand	The United Kingdom	The United States
ASEAN	12.2%	5.6%	2.9%	1.0%	23.3%	30.2%	4.7%	9.8%	4.9%	5.4%
Brunei	9.1%	3.0%	0.0%	3.0%	9.1%	27.3%	12.1%	6.1%	21.2%	9.1%
Cambodia	23.1%	0.0%	0.0%	0.0%	46.2%	23.1%	0.0%	7.7%	0.0%	0.0%
Indonesia	14.0%	5.4%	0.8%	0.8%	30.2%	25.6%	6.2%	10.9%	2.3%	3.9%
Laos	2.5%	5.0%	2.5%	0.0%	25.0%	35.0%	0.0%	20.0%	0.0%	10.0%
Malaysia	14.5%	5.1%	4.3%	4.3%	13.7%	23.1%	6.8%	14.5%	7.7%	6.0%
Myanmar	12.8%	6.4%	1.9%	0.6%	24.4%	28.2%	3.2%	12.8%	2.6%	7.1%
Philippines	14.9%	1.5%	0.0%	0.0%	22.4%	38.8%	7.5%	6.0%	3.0%	6.0%
Singapore	13.9%	7.6%	4.4%	0.0%	17.7%	36.1%	4.4%	5.7%	8.9%	1.3%
Thailand	7.6%	3.1%	3.1%	0.8%	24.4%	40.5%	2.3%	8.4%	3.8%	6.1%
Vietnam	10.9%	8.6%	5.1%	0.6%	26.9%	24.6%	4.6%	8.0%	4.0%	6.9%

## Most Preferred Country to Visit in the Region

Among the respondents who choose an ASEAN member state as their favourite destination, Thailand is the top choice with a share of 26.8%, followed by Singapore (25.5%) and Vietnam (16.6%). Thailand is most preferred only in Singapore (43.0%) and Malaysia (41.9%) while Singapore is the top choice in eight countries: Brunei (48.5%), Laos (47.5%), Cambodia (38.5%), the Philippines (35.8%), Indonesia (31.0%), Vietnam (29.7%), Myanmar (28.8%) and Thailand (28.2%).



**Thailand**  
26.8%



**Singapore**  
25.5%



**Vietnam**  
16.6%

### Q57 Among ASEAN member states, which one is your favourite destination to visit?

Country	Brunei	Cambodia	Indonesia	Laos	Malaysia	Myanmar	Philippines	Singapore	Thailand	Vietnam
ASEAN	1.3%	2.0%	12.8%	2.3%	6.6%	3.6%	2.5%	25.5%	26.8%	16.6%
Brunei	6.1%	0.0%	9.1%	0.0%	12.1%	0.0%	6.1%	48.5%	9.1%	9.1%
Cambodia	0.0%	7.7%	11.5%	3.8%	7.7%	3.8%	3.8%	38.5%	19.2%	3.8%
Indonesia	0.8%	3.9%	20.2%	0.8%	7.8%	2.3%	0.8%	31.0%	21.7%	10.9%
Laos	2.5%	0.0%	2.5%	12.5%	2.5%	0.0%	0.0%	47.5%	22.5%	10.0%
Malaysia	0.0%	2.6%	21.4%	0.0%	7.7%	1.7%	0.9%	10.3%	41.9%	13.7%
Myanmar	1.3%	2.6%	9.0%	2.6%	1.9%	5.1%	3.2%	28.8%	21.2%	24.4%
Philippines	0.0%	1.5%	6.0%	1.5%	1.5%	0.0%	9.0%	35.8%	26.9%	17.9%
Singapore	0.6%	1.3%	16.5%	0.6%	13.9%	0.6%	3.2%	5.1%	43.0%	15.2%
Thailand	0.0%	0.0%	14.5%	6.1%	6.1%	6.1%	1.5%	28.2%	18.3%	19.1%
Vietnam	3.4%	2.3%	6.3%	1.7%	4.6%	8.0%	1.7%	29.7%	22.9%	19.4%

*Thank you*

We wish to extend our sincere appreciation to all the respondents for taking their time to complete this Survey. Your collective voice is a reflection of the opinions and perspectives of Southeast Asians and helps to shape the regional discourse on strategic issues. In keeping with previous years, we maintain that this process is an exercise in itself demonstrative of ASEAN collaboration and of the ASEAN Community in action.





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