

The State of Southeast Asia:

2019

SURVEY REPORT



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The State of Southeast Asia: 2019 Survey Report is published by the ASEAN Studies Centre at ISEAS-Yusof Ishak Institute and available electronically at www.iseas.edu.sg

If you have any comments or enquiries about the survey, please email us at asc@iseas.edu.sg

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The authors of the report are researchers at the ASEAN Studies Centre, ISEAS-Yusof Ishak Institute. We are grateful to Mr Zul Hazmi bin Nordin for his assistance, as we are indebted to our ISEAS colleagues for their feedback and suggestions. This survey is the result of the ASEAN Community at work as more than a thousand Southeast Asians from various public and private sectors and entities participated in sharing their opinions.

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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 Nalanda-Sriwijaya Centre (NSC) 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 building the ASEAN Community.

About the Survey

The ASEAN Studies Centre at ISEAS-Yusof Ishak Institute conducted the “State of Southeast Asia: 2019” online survey between 18 November and 5 December 2018 to seek the views of Southeast Asians on regional affairs. The survey used the purposive sampling method, canvassing views from a total of 1,008 Southeast Asians who are regional experts and stakeholders from the policy, research, business, civil society, and media communities. As such, the results of this survey are not meant to be representative. Rather, it aims to present a general view of prevailing attitudes among those in a position to inform or influence policy on regional political, economic and social issues and concerns.

The survey is divided into five sections. The first section sketches out the nationality and affiliation of the respondents. Section II explores the political and economic outlook for 2019, as well as providing views on major developments in the year ahead and security concerns. Some of the issues covered in this section include the Regional Comprehensive Economic

Partnership (RCEP), the Comprehensive and Progressive Agreement for Trans-Pacific Partnership (CPTPP), the US-China trade war, denuclearisation in the Korean Peninsula and Rohingya issue. Section III examines major power relations in the region, with a specific focus on the US and China. Section IV looks into the region’s perception of the major powers (China, the European Union, India, Japan, Russia and the US) and provides some clues as to which major power does the region trust the most (or the least). The survey concludes with Section V which looks at three aspects of soft power – tertiary education, tourism and foreign language – as proxies of the major powers’ influence in Southeast Asia.

For the purpose of readability, the figures in this analysis are rounded up or down to the one decimal point. This report is released on 29 January 2019. A summary of the survey findings was published earlier in ASEANFocus (Issue 1/2019) on 7 January 2019.

SECTION I : BACKGROUND OF RESPONDENTS

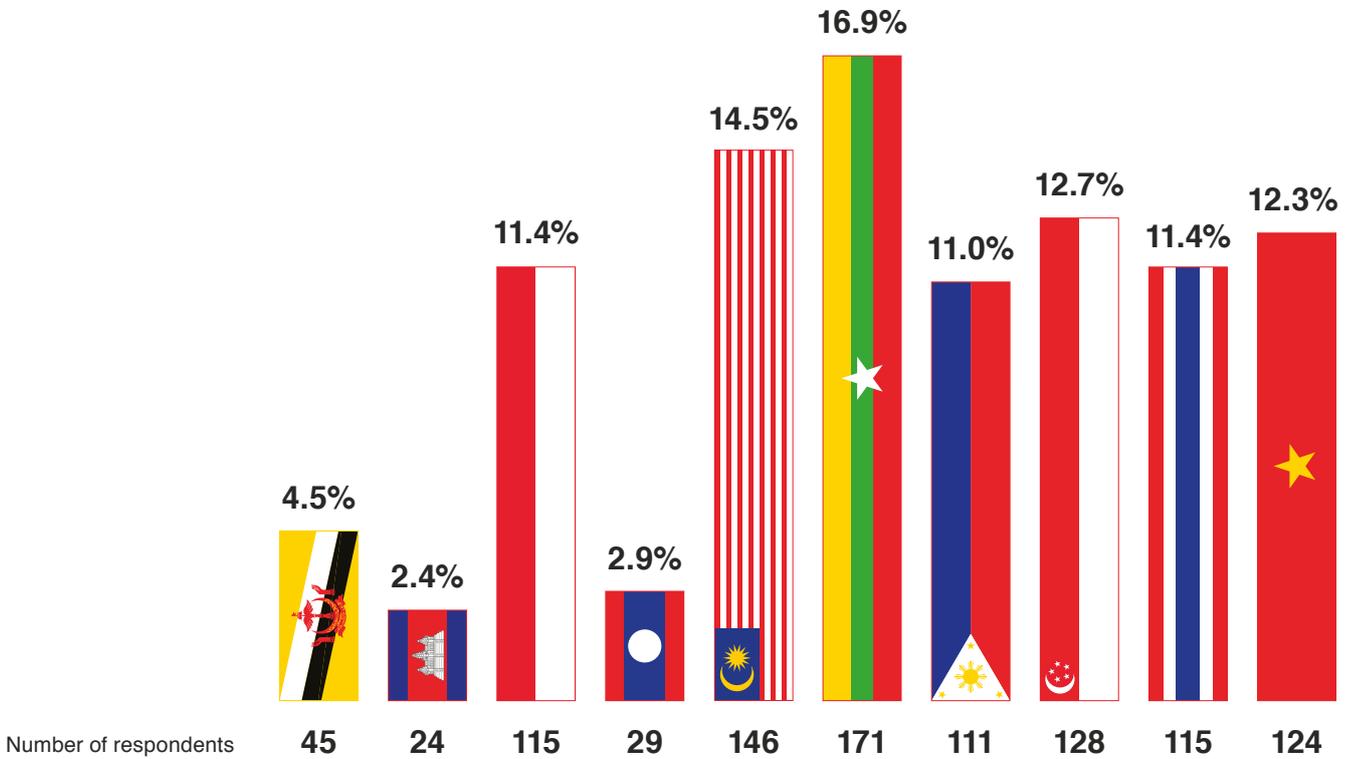
Question 1

What is your nationality?

Answered: 1,008; Skipped: 0

The 1,008 respondents were drawn from all ten ASEAN member states to ensure that the survey accurately reflects the regional view. The highest responses for the survey came from Myanmar (16.9%), followed by Malaysia

(14.5%), Singapore (12.7%), Vietnam (12.3%), Indonesia (11.4%), Thailand (11.4%), the Philippines (11%), Brunei Darussalam (4.5%), Laos (2.9%) and Cambodia (2.4%).



Total respondents: 1,008

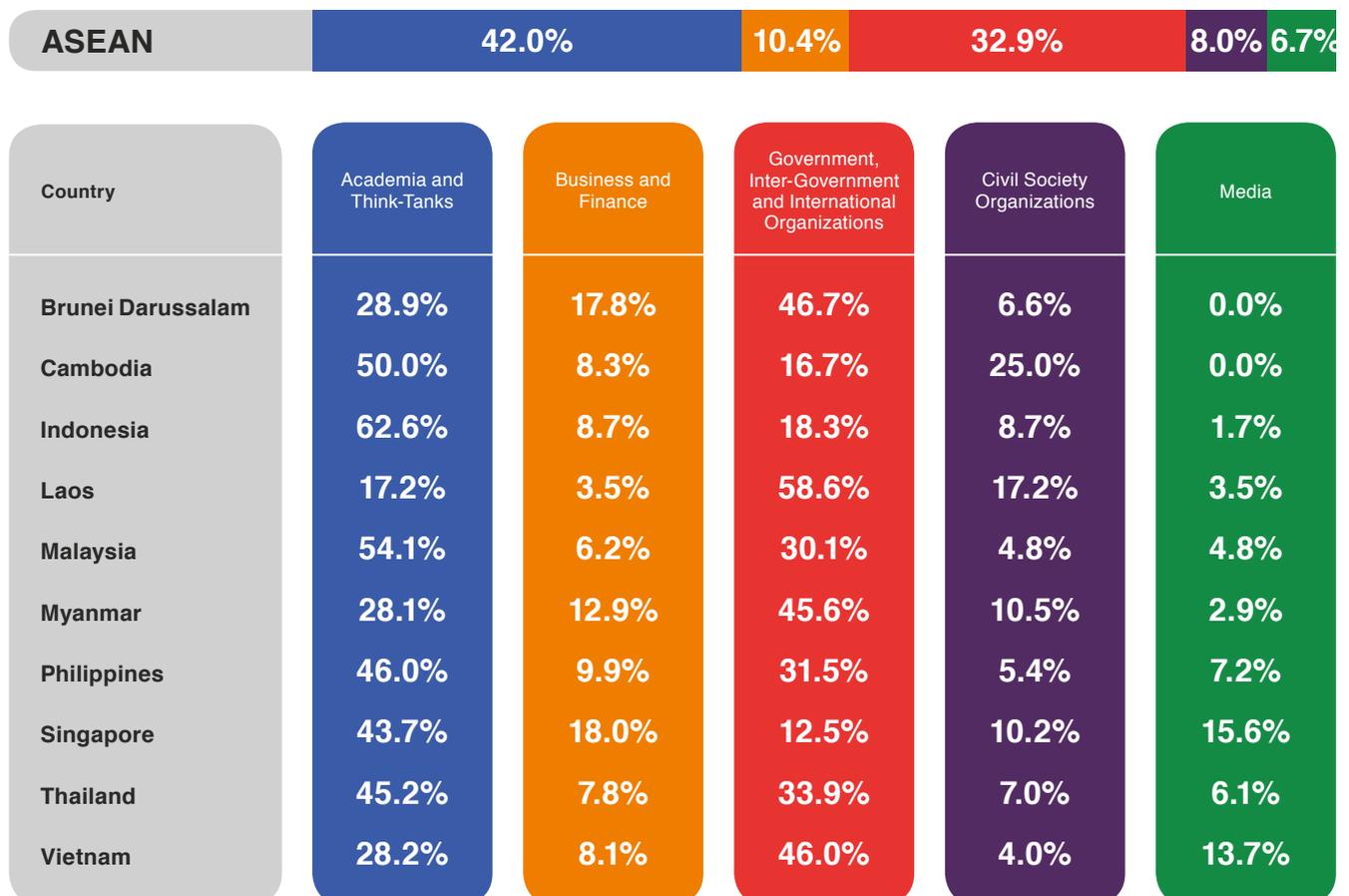
Question 2

What is your affiliation?

Answered: 1,008; Skipped: 0

The academe and think-tank community made up the largest group of respondents at 42%. Nearly one third of the respondents (32.9%) came from the government, inter-governmental and international organisation cluster,

which provides a rare opportunity to access perspectives from these often closed circles. The business and finance community (10.4%), civil society and NGO (8%), and the media (6.7%) made up the remaining 25.1% respondents.



SECTION II: REGIONAL OUTLOOK AND DEVELOPMENTS

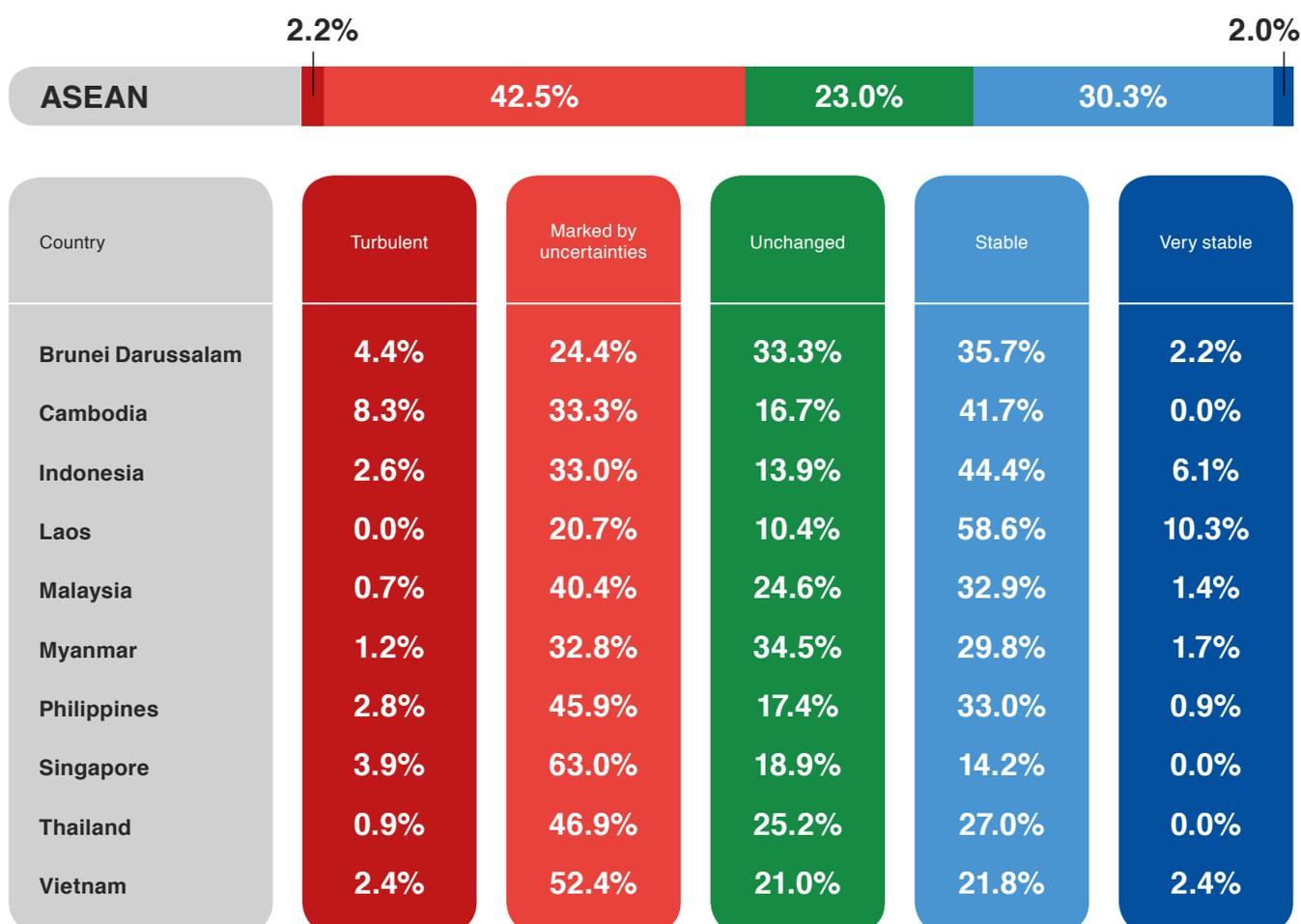
Question 3

The state of the region will be ...

Answered: 1,005; Skipped: 3

The overall mood of the region is one of pessimism with 42.5% of the respondents expecting the region to encounter a period of uncertainty and a small percentage (2.2%) harbouring concerns of a turbulent year ahead. On the other hand, 32.3% see the region as either “stable” (30.3%) or “very stable” (2%). Nearly a quarter of the respondents (23%) view the fundamentals of the region as “unchanged.” The most optimistic is Laos

with 68.9% viewing the region to be “stable” or “very stable” while Singaporeans are the most pessimistic, with 66.9% expecting 2019 to be marked by uncertainties and even turbulence.



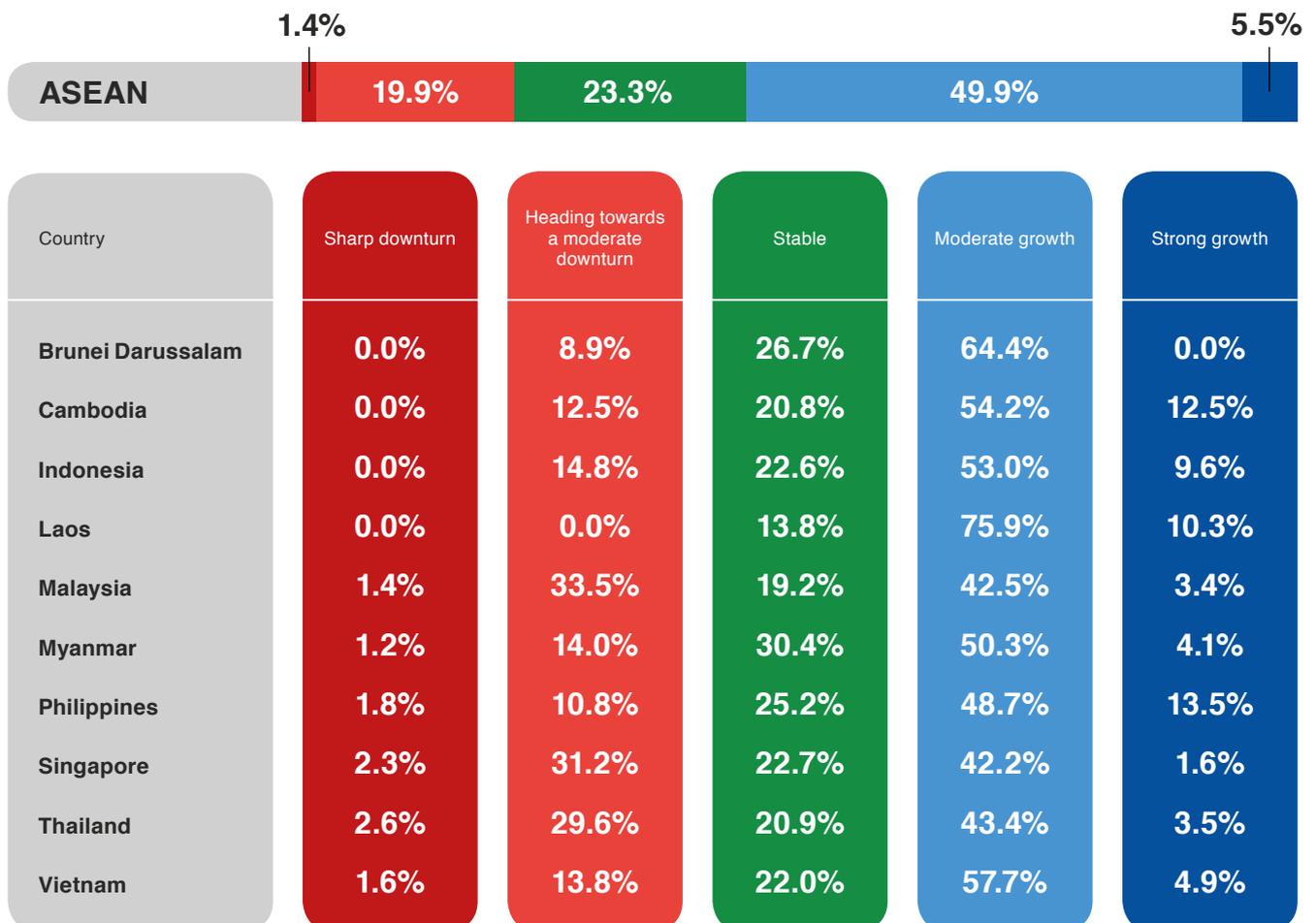
Question 4

How do you view the state of the region's economy in 2019?

Answered: 1,007; Skipped: 1

Across all ASEAN member states, the positive outlook (55.4%) on the regional economy outweighs the negative responses (21.3%). More than half of the respondents (55.4%) expect that the region will experience growth, whether moderate (49.9%) or strong (5.5%). Nearly a quarter (23.3%) anticipate a stable year ahead. The strong endorsement of the economy is somewhat surprising given the current headwinds from the on-going US-China trade war.

On the other hand, 21.3% of the respondents see the region heading towards a moderate (19.9%) or sharp downturn (1.4%). The most bullish (moderate to strong growth) sentiments are found in Laos (86.2%), Cambodia (66.7%) and Brunei (64.4%). Malaysia (34.9%), Singapore (33.5%) and Thailand (32.2%) harbour the most bearish (moderate to sharp downturn) sentiments in the region.



Question 5

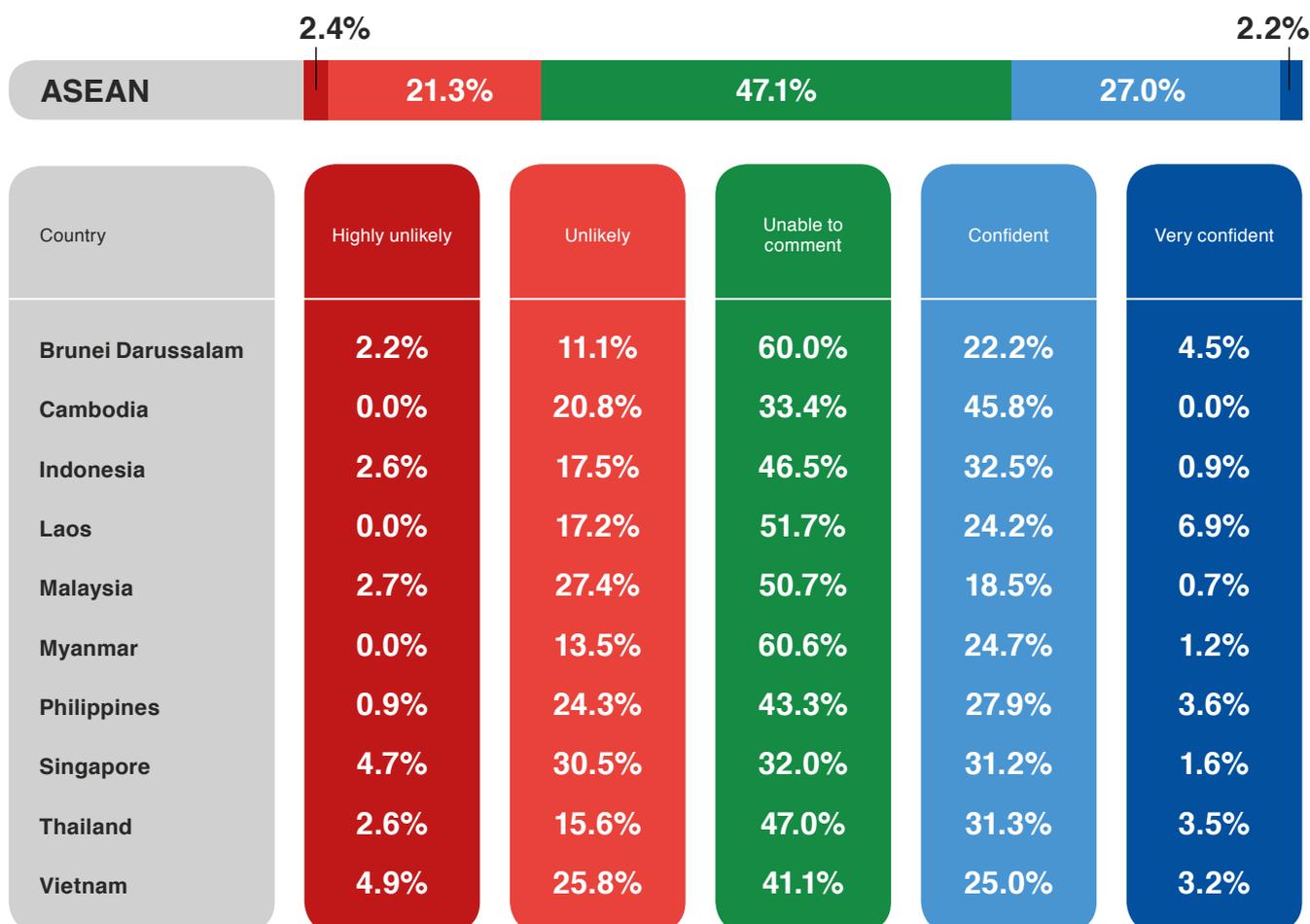
Are you confident that the Regional Comprehensive Economic Partnership (RCEP) will be signed in 2019?

Answered: 1,006; Skipped: 2

The positive views on the region's economic resilience do not carry through to the Regional Comprehensive Economic Partnership (RCEP). When asked of their views on the conclusion of the RCEP negotiations, 47.1% are "unable to comment." This could be interpreted as not having sufficient information to make an informed opinion, suggesting that more effort be expended to engage relevant stakeholders in this discussion.

negotiations to be a drawn-out affair that is "unlikely" (21.3%) or "highly unlikely" (2.4%) to be wrapped up in 2019. Cambodia respondents are the most upbeat with 45.8% giving their vote of "confidence" towards a speedy and final conclusion, followed by Thailand (34.8%) and Indonesia (33.4%). The highest degrees of scepticism are from Singapore (35.2%), Vietnam (30.7%) and Malaysia (30.1%) – three of the four ASEAN signatories to the Comprehensive and Progressive Agreement for the Trans-Pacific Partnership (CPTPP).

Overall, 29.2% of the respondents are either "confident" (27%) or "very confident" (2.2%) that the RCEP will be signed in 2019. In contrast, 23.7% see the RCEP



Question 6

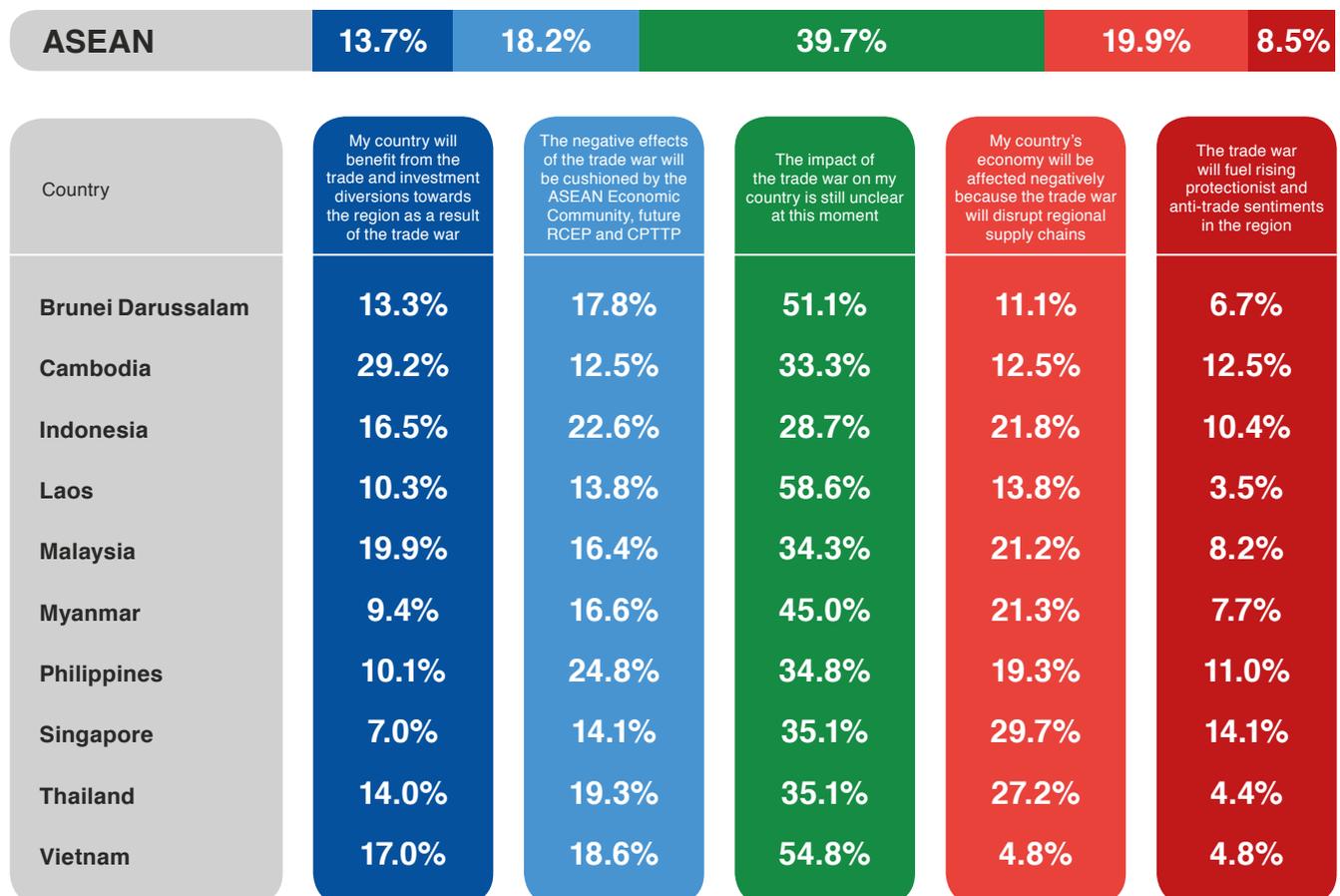
What is your view of the impact of the US-China trade war on your country?

Answered: 1,003; Skipped: 5

A great deal of uncertainty also surrounds the possible dislocations (and pay-offs) from the US-China trade war as 39.7% of the respondents are unclear of the trade war's impact on their respective countries. Nevertheless, more respondents think their country will stand to lose out from the trade war than reaping any benefits. Nearly one in five respondents (19.9%) shares that their "country's economy will be affected negatively because the trade war will disrupt regional supply chains." Singapore respondents bear the strongest sense of foreboding with 29.7% holding this negative perspective. This sense of anxiety is shared by Thai (27.2%) and Indonesian (21.8%) respondents.

At the same time, 13.7% of all respondents see their country "benefiting from the trade and investment diversions towards the region," with Cambodia leading the optimism (29.2%), followed by Malaysia (19.9%) and Vietnam (17%).

A small number of respondents (8.5%) think "the trade war will fuel rising protectionist and anti-trade sentiments in the region." Only 18.2% of the respondents realistically see the ASEAN Economic Community, the RCEP and the CPTPP as safe harbours to weather the US-China trade war.



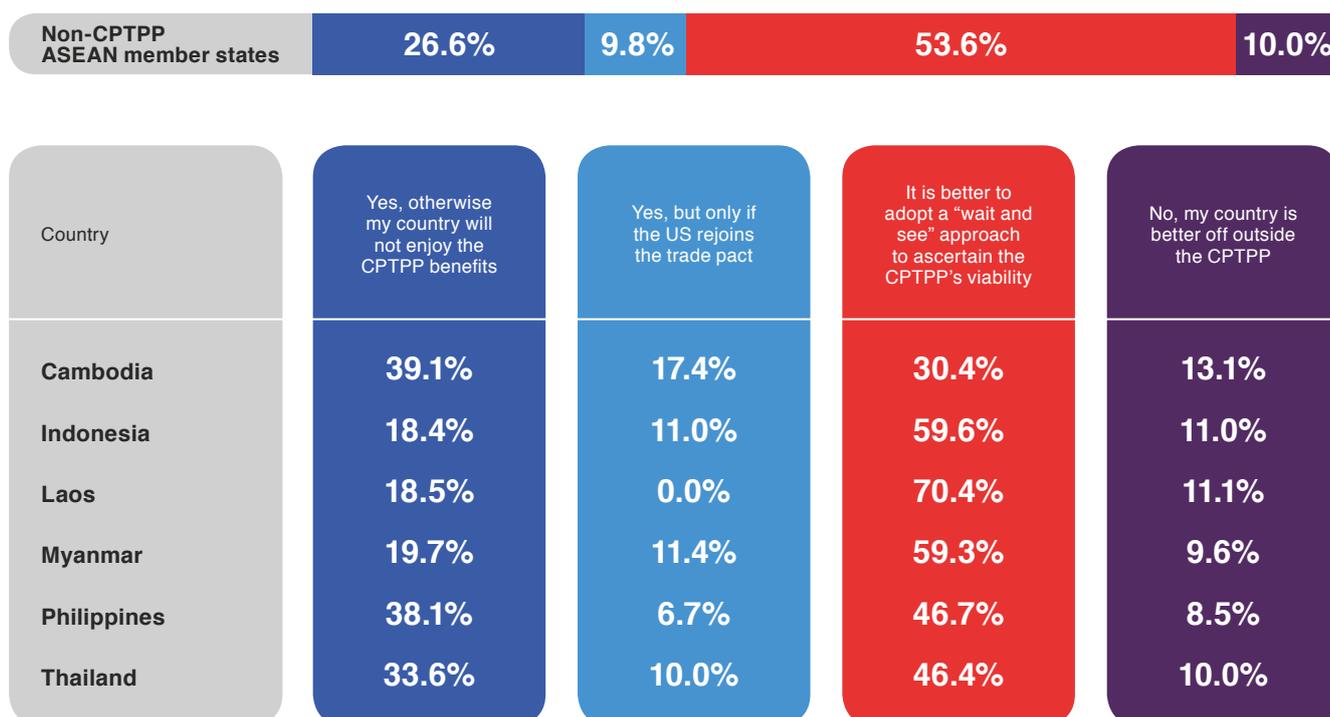
Question 7

Do you think your country should join the Comprehensive and Progressive Agreement for Trans-Pacific Partnership (CPTPP)?

Answered: 554; Skipped: 11

The CPTPP entered into force on 30 December 2018, having secured ratifications by seven members – Australia, Canada, Japan, Mexico, New Zealand, Singapore and Vietnam. The remaining four signatories – Brunei Darussalam, Chile, Malaysia and Peru – are expected to follow suit in due course. The survey canvassed the views of respondents from the six non-CPTPP ASEAN members (Cambodia, Indonesia, Laos, Myanmar, the Philippines and Thailand) on their country’s possible accession to the trade pact. In this multiple response question, the majority of the respondents (53.6%) think “it is better to adopt a wait-and-see approach to ascertain the

CPTPP’s viability.” Meanwhile, support for the CPTPP is not insignificant with more than a third of the respondents (36.4%) positively inclined towards the trade pact. Within this grouping, 26.6% support their country joining the CPTPP as it is presently constituted, and 9.8% prefer that their country join “only if the US rejoins the trade pact.” The strongest support for the CPTPP in its current form are found in Cambodia (39.1%), the Philippines (38.1%) and Thailand (33.6%). A small number of respondents (10%) think their country is “better off outside the CPTPP.”

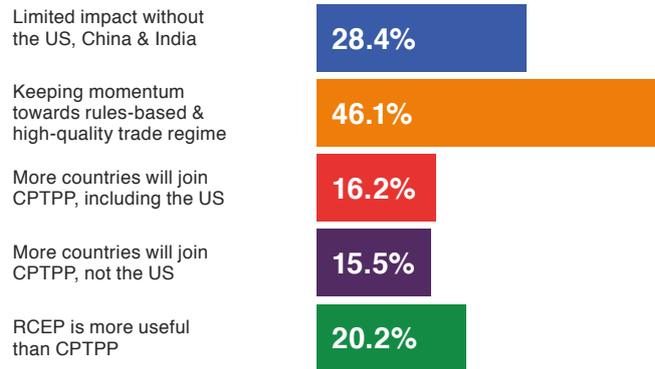


Question 8

Which of the following statements on the CPTPP do you agree with? (check those that apply)

Answered: 965; Skipped: 43

On the broader question on the CPTPP, which includes responses from all ten ASEAN member states, most respondents (46.1%) agree that the CPTPP is “important in keeping the momentum towards a rules-based and high-quality regional trade regime.” 20.2% of all respondents support the usefulness of RCEP over the CPTPP; the higher levels of support for the RCEP over the CPTPP come from Lao (39.3%) and Indonesian (35.1%) respondents. Overall, 28.4% of all respondents think the CPTPP would be of limited impact because it excludes the US, China and India; Cambodian respondents are more pessimistic with 43.5% of the respondents sharing this view.



Country	The CPTPP would be of limited impact because it excludes the US, China and India	The CPTPP is important in keeping the momentum towards a rules-based and high-quality regional trade regime	More countries will join the CPTPP, including the US	More countries will join the CPTPP, but the US will remain outside this framework	The Regional Comprehensive Economic Partnership (RCEP) is more useful than the CPTPP
Brunei Darussalam	28.9%	48.9%	11.1%	35.6%	8.9%
Cambodia	43.5%	47.8%	26.1%	4.4%	17.4%
Indonesia	32.4%	30.6%	6.3%	12.6%	35.1%
Laos	28.6%	21.4%	10.7%	14.3%	39.3%
Malaysia	33.6%	42.9%	11.4%	17.9%	23.6%
Myanmar	31.7%	23.6%	15.5%	15.5%	26.7%
Philippines	27.6%	46.7%	13.3%	11.4%	19.1%
Singapore	21.3%	74.6%	24.6%	21.3%	8.2%
Thailand	29.6%	41.7%	16.7%	10.2%	23.2%
Vietnam	18.0%	73.0%	26.2%	13.1%	4.9%

Question 9

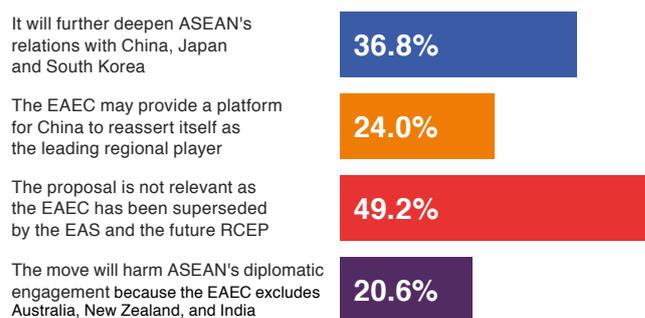
Malaysia’s Prime Minister Mahathir Mohamad has indicated his interest to revive the East Asia Economic Caucus (EAEC). How do you view this move? *(check those that apply)*

Answered: 981; Skipped: 27

Discussions on the regional architecture have become more captivating with the return to political power of Malaysian Prime Minister Mahathir Mohamad who is keen to revive his proposal of an East Asia Economic Caucus (EAEC) for closer integration among the ASEAN Plus Three countries (China, Japan and South Korea). Nearly half of the respondents (49.2%) hold the view that “the proposal is no longer relevant as the EAEC has been superseded by the East Asia Summit and the future RCEP.” The strongest reservation to the EAEC comes from Singapore (65.6%), Indonesia (56.7%), the Philippines (55.1%), Thailand (52.7%) and Vietnam (52.1%).

At the same time, Mahathir’s brainchild has found traction in the other five member states. Respondents from Brunei (55.6%), Malaysia (50.7%), Cambodia (50%), Laos (50%) and Myanmar (47.2%) think the EAEC “will further deepen ASEAN’s relations with China, Japan and

South Korea.” Across the board, the respondents appear unconcerned with the EAEC’s narrow membership, which excludes Australia, India and New Zealand. Only one in five (20.6%) respondents is concerned with the omission of these three countries from the EAEC. This concern is most audible in Singapore (29.7%) and Vietnam (27.7%).



Country	It will further deepen ASEAN's relations with China, Japan and South Korea	The EAEC may provide a platform for China to reassert itself as the leading regional player	The proposal is not relevant as the EAEC has been superseded by the EAS and the future RCEP	The move will harm ASEAN's diplomatic engagement because the EAEC excludes Australia, New Zealand, and India
Brunei Darussalam	55.6%	37.8%	40.0%	20.0%
Cambodia	50.0%	37.5%	29.2%	20.8%
Indonesia	32.7%	23.0%	56.7%	20.4%
Laos	50.0%	28.6%	35.7%	14.3%
Malaysia	50.7%	20.8%	47.2%	13.9%
Myanmar	47.2%	20.5%	32.3%	16.8%
Philippines	31.2%	27.5%	55.1%	18.4%
Singapore	17.2%	20.3%	65.6%	29.7%
Thailand	30.0%	23.6%	52.7%	21.0%
Vietnam	29.4%	25.2%	52.1%	27.7%

Question 10

What are your top 3 concerns for security challenges facing Southeast Asia? (check only 3 responses)

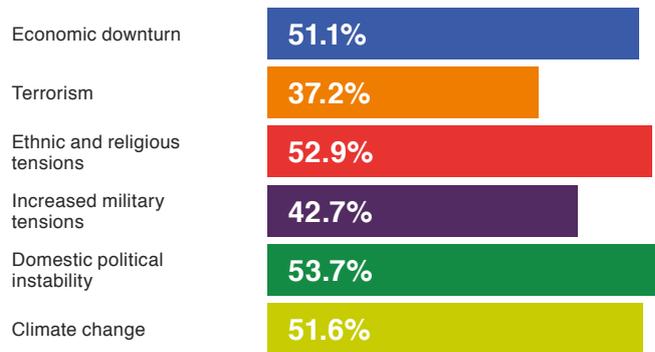
Answered: 1,007; Skipped: 1

The survey provided six options – economic downturn, terrorism, ethnic and religious tensions, increased military tensions from potential regional flashpoints, domestic political instability, and climate change – for the respondents to identify their top three security concerns. Four options receive more than 50% responses, namely, domestic political instability (53.7%), ethnic and religious tensions (52.9%), climate change (51.6%) and economic downturn (51.1%). Terrorism ranks at the lowest rung with only 37.2% of the respondents.

Interestingly, threats from “more intense and frequent weather events resulting from climate change” rank third, beating economic downturn, terrorism and regional military tensions. Climate change is the top security concern in Laos (62.1%, jointly with economic downturn), the Philippines (62.2%, jointly with regional military tension) and Singapore (61.7%).

The top security concern for the respective ASEAN member states are: Brunei (economic downturn, 80%), Cambodia

(domestic political instability, 75%), Indonesia (ethnic and religious tension, 67.8%), Laos (economic downturn and climate change, 62.1% respectively), Malaysia (economic downturn, 63.7%), Myanmar (ethnic and religious tension, 67.1%), the Philippines (regional military tensions and climate change, 62.2% respectively), Singapore (climate change, 61.7%), Thailand (domestic political instability, 78.3%) and Vietnam (regional military tensions, 78.2%).



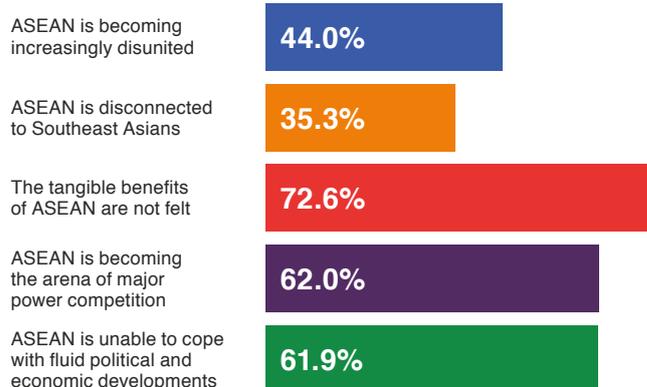
Country	Economic downturn	Terrorism	Ethnic and religious tensions	Increased military tensions	Domestic political instability	Climate change
Brunei Darussalam	80.0%	31.1%	55.6%	46.7%	35.6%	46.7%
Cambodia	58.3%	16.7%	41.7%	50.0%	75.0%	50.0%
Indonesia	45.2%	42.6%	67.8%	32.2%	59.1%	41.7%
Laos	62.1%	41.4%	41.4%	37.9%	34.5%	62.1%
Malaysia	63.7%	37.3%	63.0%	39.7%	45.9%	47.3%
Myanmar	34.7%	35.3%	67.1%	24.1%	64.7%	45.3%
Philippines	38.7%	53.2%	22.5%	62.2%	58.6%	62.2%
Singapore	56.3%	46.9%	58.6%	39.8%	37.5%	61.7%
Thailand	68.7%	25.2%	47.0%	28.7%	78.3%	42.6%
Vietnam	39.5%	26.6%	38.7%	78.2%	39.5%	62.9%

Question 11

What are your top 3 concerns about ASEAN?
(check only 3 responses)

Answered: 1,006; Skipped: 2

The main concern about ASEAN is the perception that ASEAN has not “delivered” for its 650 million population. Nearly three quarters of the respondents (72.6%) express their disappointment that “the tangible benefits of ASEAN are not felt.” Respondents from seven ASEAN member states (except Cambodia, Laos and Vietnam) choose this as their top concern. Rounding off the top three concerns is the fear that “ASEAN is becoming the arena for major power competition” (62%) and ASEAN’s inability to “cope with fluid political and economic developments” (61.9%). Southeast Asians’ sense of “disconnectedness” does not factor highly (35.3%). 44% of the respondents share their concern over ASEAN becoming increasingly disunited. This is the top concern among the Vietnamese respondents (69.4%).



Country	ASEAN is becoming increasingly disunited	ASEAN is disconnected to Southeast Asians	The tangible benefits of ASEAN are not felt	ASEAN is becoming the arena of major power competition	ASEAN is unable to cope with fluid political and economic developments
Brunei Darussalam	33.3%	31.1%	80.0%	66.7%	64.4%
Cambodia	58.3%	25.0%	54.2%	79.2%	83.3%
Indonesia	36.5%	47.0%	74.8%	59.1%	59.1%
Laos	37.9%	6.9%	75.9%	90.0%	51.7%
Malaysia	39.7%	48.6%	76.7%	59.6%	59.6%
Myanmar	36.7%	18.9%	71.0%	62.7%	67.5%
Philippines	34.2%	52.3%	79.3%	53.2%	63.1%
Singapore	48.4%	41.4%	68.0%	64.8%	66.4%
Thailand	47.8%	33.0%	75.7%	53.9%	58.3%
Vietnam	69.4%	21.8%	63.7%	67.7%	54.8%

Question 12

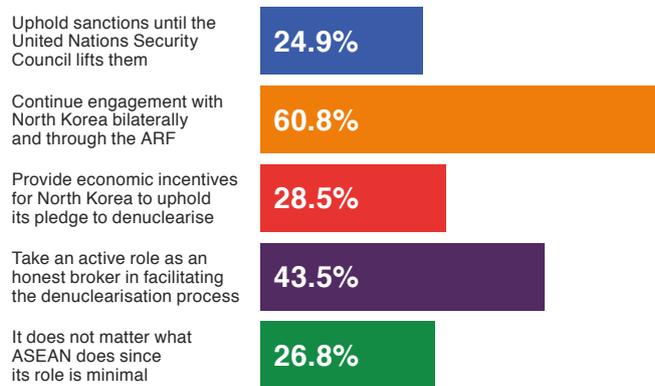
How should ASEAN respond to North Korea’s overtures regarding denuclearisation of the Korean Peninsula?
(check those that apply)

Answered: 998; Skipped: 10

The Trump-Kim Summit in Singapore on 12 June 2018 was a political highlight of 2018, a testament to Singapore’s diplomatic standing as well as ASEAN’s niche of being a friend to all and an enemy of none. The fact that only 26.8% of the respondents take the view that “it does not matter what ASEAN does since its role is minimal” suggests that the majority of the respondents expect the regional organisation to stay engaged on this issue.

Few respondents in this multiple-option question consider an ASEAN’s “carrot and stick approach” with only 28.5% agreeing that ASEAN should “provide economic incentives to North Korea to uphold its pledge to denuclearise,” and 24.9% supporting “upholding sanctions until the United Nations Security Council lifts them.” The majority (60.8%) favour the diplomatic approach of continued “engagement with North Korea bilaterally and through the ASEAN Regional Forum.”

Diplomatic engagement is the top response across all ASEAN member states except for Cambodia where 75% of the respondents prefer that ASEAN “take an active role as an honest broker.”



Country	Uphold sanctions until the United Nations Security Council lifts them	Continue engagement with North Korea bilaterally and through the ARF	Provide economic incentives for North Korea to uphold its pledge to denuclearise	Take an active role as an honest broker in facilitating the denuclearisation process	It does not matter what ASEAN does since its role is minimal
Brunei Darussalam	26.7%	62.0%	33.3%	37.8%	42.2%
Cambodia	16.7%	66.7%	33.3%	75.0%	16.7%
Indonesia	14.0%	64.9%	24.6%	52.6%	20.2%
Laos	13.8%	75.9%	38.0%	41.4%	27.6%
Malaysia	28.9%	61.3%	31.0%	37.3%	37.3%
Myanmar	9.5%	59.8%	32.5%	37.9%	23.1%
Philippines	34.6%	58.2%	28.2%	44.6%	22.7%
Singapore	41.4%	60.2%	23.4%	43.8%	33.6%
Thailand	27.0%	54.8%	27.8%	39.1%	23.4%
Vietnam	27.0%	61.5%	24.6%	49.2%	21.3%

Question 13

What should ASEAN do to respond to the crisis in Myanmar’s Rakhine State? (check those that apply)

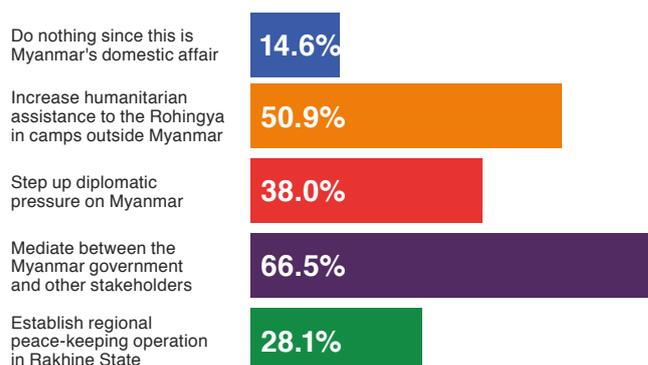
Answered: 1,002; Skipped: 6

Closer to home, the Rohingya issue continues to reverberate through the region and beyond. ASEAN has been criticised for hiding behind its veil of “non-interference” as a humanitarian crisis continues to take its toll on more than half a million displaced Rohingya people. The survey results suggest that ASEAN should take a more proactive approach as the option “do nothing since this is Myanmar’s domestic issue” garners the lowest number of responses (14.6%). Even among Myanmar respondents, “do nothing” is not the preferred approach.

and the relatively more intrusive act of mediation. Most respondents from Brunei (77.8%), the Philippines (71.2%) and Singapore (66.1%) choose humanitarian assistance as their primary response, while mediation is the top choice for respondents from Indonesia (79.1%), Laos (51.7%), Malaysia (72.4%), Thailand (66.1%), Vietnam (67.2%) and Myanmar (59.2%). 62.5% of Cambodian respondents choose both humanitarian assistance and mediation as their top responses.

Overall, 66.5% of all respondents select “mediating between the Myanmar government, the international community and the Rakhine and Rohingya communities” as the best way forward. This view is shared by 59.2% of Myanmar and 79.1% of Indonesian respondents. The second most preferred response (50.9%) is to “increase humanitarian assistance to the Rohingya in camps outside Myanmar, followed by “stepping up diplomatic pressure on Myanmar” (38%).

Reflecting the reality on the ground, ASEAN is divided between the “safer” option of humanitarian assistance



Country	Do nothing since this is Myanmar's domestic affair	Increase humanitarian assistance to the Rohingya in camps outside Myanmar	Step up diplomatic pressure on Myanmar	Mediate between the Myanmar government and other stakeholders	Establish regional peace-keeping operation in Rakhine State
Brunei Darussalam	4.4%	77.8%	48.9%	75.6%	53.3%
Cambodia	4.2%	62.5%	41.7%	62.5%	25.0%
Indonesia	2.6%	64.4%	50.4%	79.1%	33.9%
Laos	48.3%	27.6%	10.3%	51.7%	10.3%
Malaysia	3.5%	56.6%	62.8%	72.4%	37.9%
Myanmar	41.4%	14.8%	7.1%	59.2%	20.7%
Philippines	7.2%	71.2%	48.7%	60.4%	35.1%
Singapore	7.1%	66.1%	51.2%	63.8%	33.1%
Thailand	12.2%	47.0%	35.7%	66.1%	20.0%
Vietnam	16.4%	44.3%	20.5%	67.2%	13.1%

SECTION III: MAJOR POWERS AND THEIR ENGAGEMENT IN THE REGION

Question 14

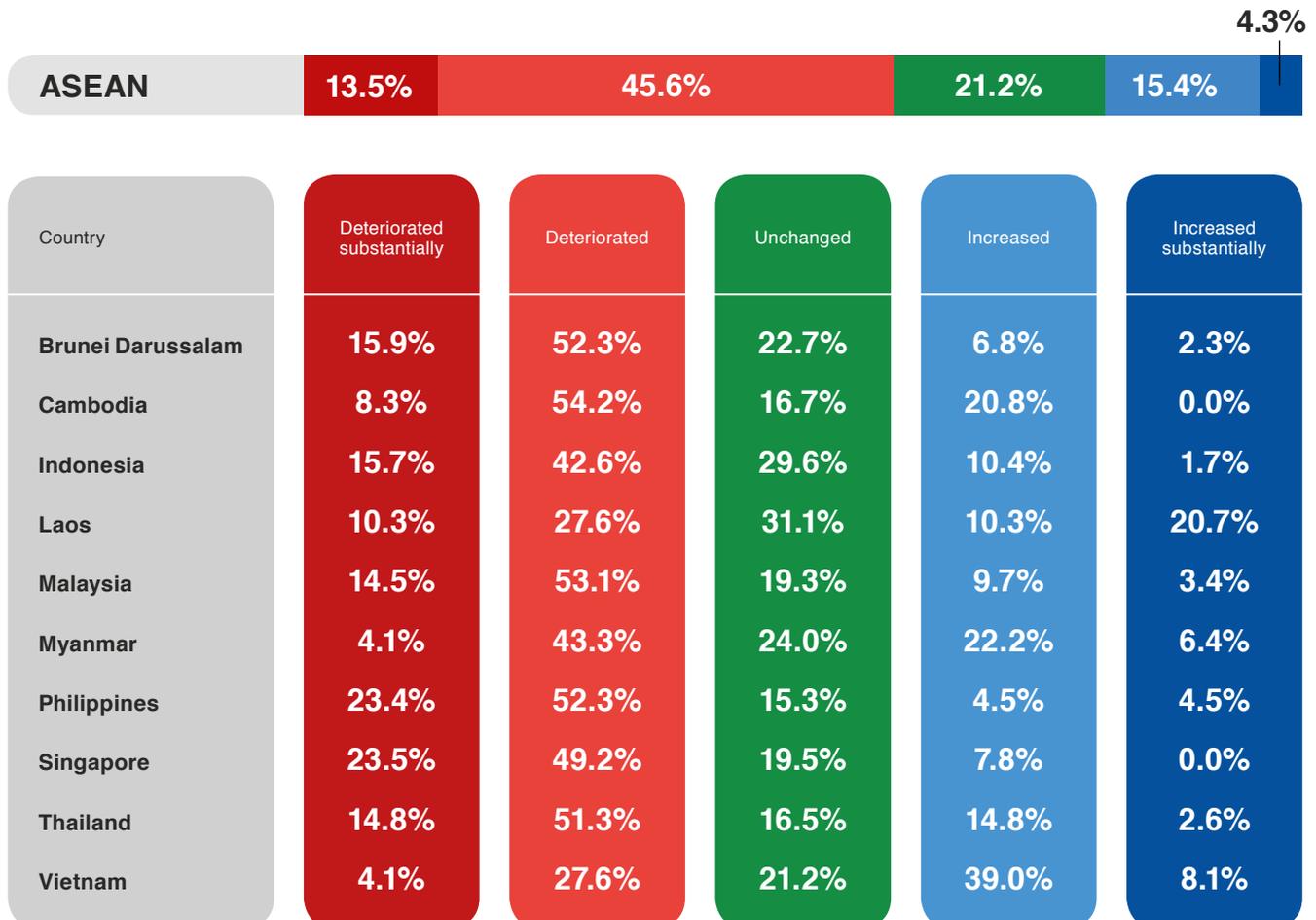
How do you view the US' global power and influence today compared to one year ago?

Answered: 1,005; Skipped: 3

The survey invited the respondents to share their perception of (a) the US as a global power and influence today compared to one year ago; (b) the Trump Administration's engagement with the region; and (c) the US' reliability as a strategic partner and provider of regional security. For all three questions, the general view of the US is overwhelmingly negative.

Nearly six out of ten respondents (59.1%) think US power and influence at the global stage has either deteriorated (45.6%) or deteriorated substantially (13.5%). In contrast, only 19.7% hold the view that US global power and influence has increased (15.4%) or increased substantially

(4.3%). 21.2% see US' position as unchanged. To put the larger picture into perspective, the respondents holding the view on the US' decline outnumber by three to one their peers who think US power has either increased or increased substantially. The countries with the highest degree of concern over the US' decline are the Philippines (75.7%), Singapore (72.7%), Brunei (68.2%) and Malaysia (67.6%). Bucking this pessimistic trend is Vietnam, the only country where the positive sentiments (47.1%) outnumber the sceptics (31.7%).



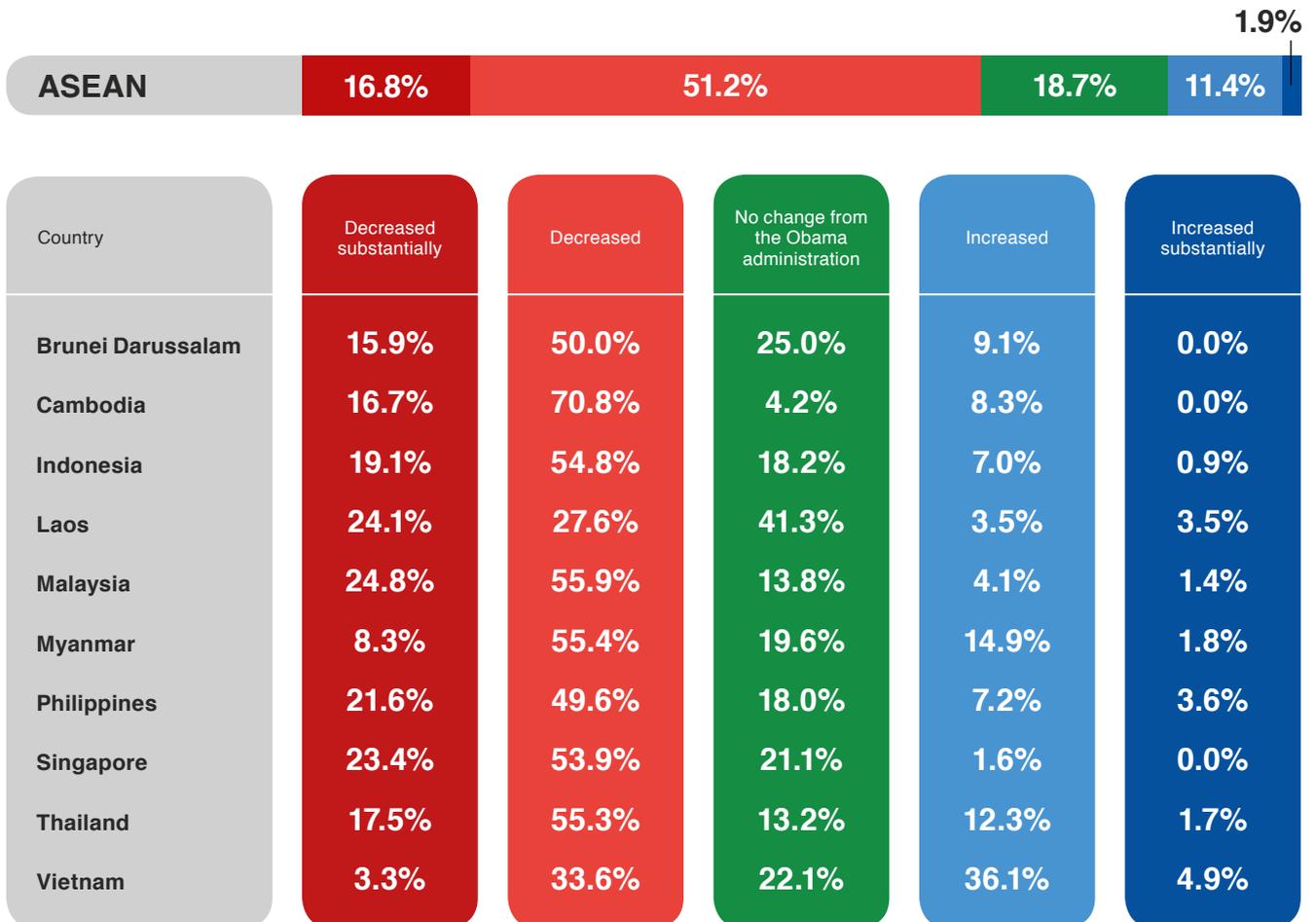
Question 15

The level of US engagement with Southeast Asia under the Trump Administration has...

Answered: 1,000; Skipped: 8

The pessimistic sentiments double down as respondents cast their assessment of the Trump Administration’s engagement with Southeast Asia. Only 13.3% think US engagement with the region has increased (11.4%) or increased substantially (1.9%) while about 68% think it has either decreased (51.2%) or decreased substantially (16.8%). This negative assessment is strongest in

Cambodia (87.5%), followed by Malaysia (80.7), Singapore (77.3%), Indonesia (73.9%), Thailand (72.8%) and the Philippines (71.2%). Vietnam is again the only country where the positive views (41%) are higher than the negative ones (36.9%).



Question 16

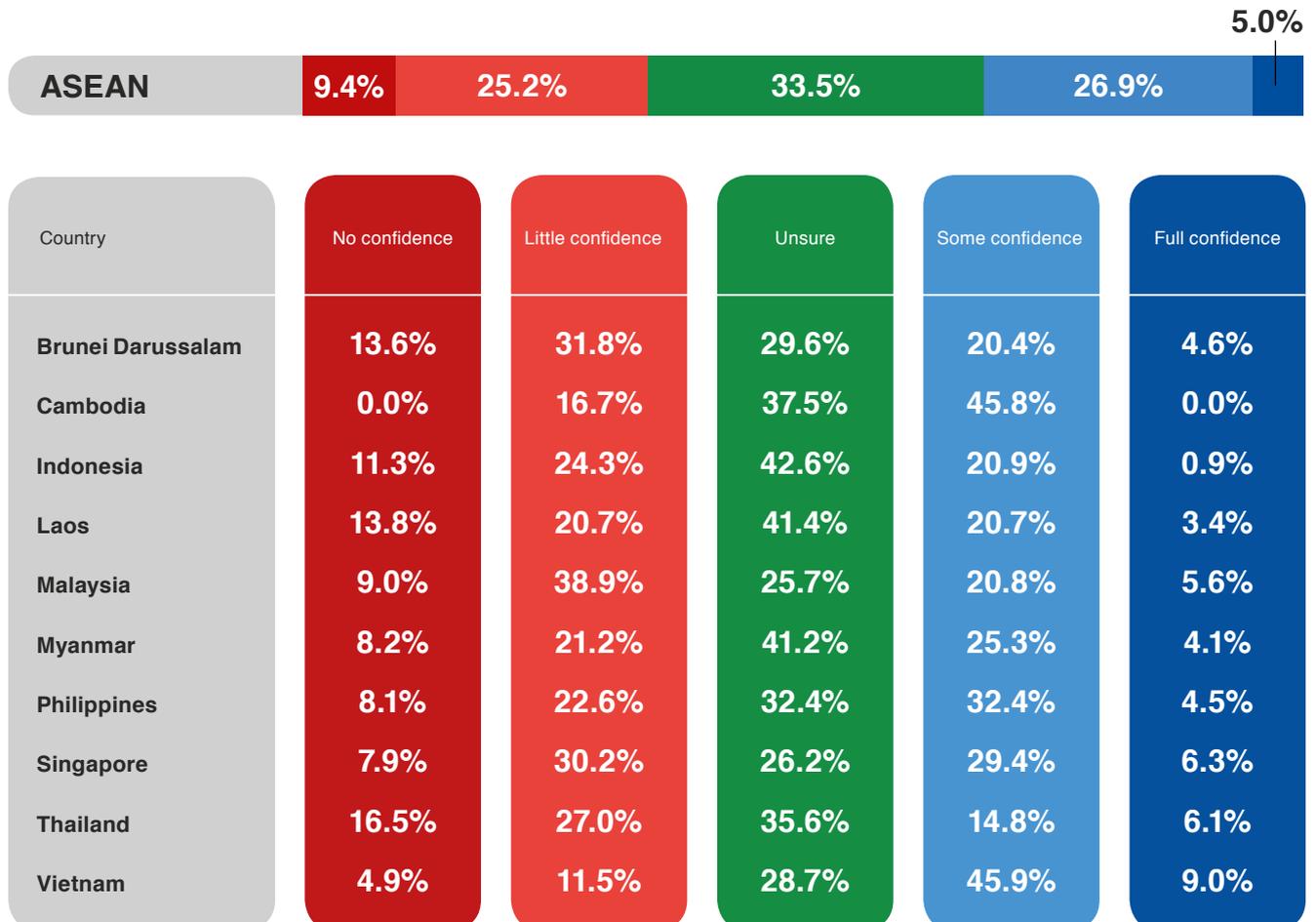
How confident are you of the US as a strategic partner and provider of regional security?

Answered: 1,000; Skipped: 8

Findings on the US' reliability as a strategic partner and provider of regional security support the general trend of the region's downcast view of the US. Less than a third of the respondents have some confidence (26.9%) or full confidence (5%) in the US, with the strongest support coming from Vietnam (54.9%) and Cambodia (45.8%). 34.6% of the respondents have little or no confidence in the US' reliability. This view is most pronounced in Malaysia (47.9%), Brunei (45.4%) and Thailand (43.5%). Equally noteworthy is the high level of uncertainty over the US' commitment towards the region. About a third of the

respondents (33.5%) is unsure of the US' reliability, a view shared most widely in Indonesia (42.6%), Laos (41.4%) and Myanmar (41.2%).

Taken together, 68.1% of the respondents are unsure of or have little confidence in the US' reliability as a strategic partner and provider of regional security. However, we would caution against equating this high level of uncertainty or little confidence with the conclusion that the US is unwanted or unwelcome in the region. The latter question is not covered in this survey.



Question 17

How do you view China’s re-emergence as a major power with respect to Southeast Asia? (check those that apply)

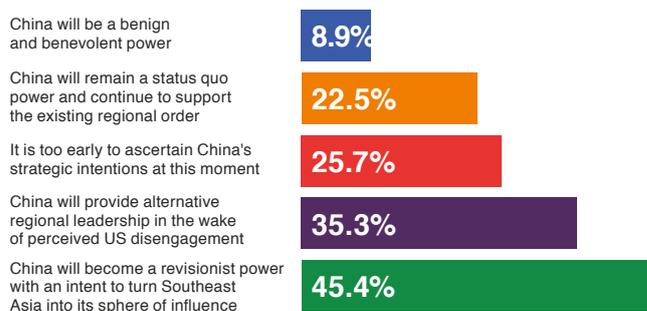
Answered: 995; Skipped: 13

The respondents were asked to share their views on China’s re-emergence as a major power with respect to Southeast Asia. Most respondents (45.4%) think “China will become a revisionist power with an intent to turn Southeast Asia into its sphere of influence.” This is the top response in six ASEAN member states: the Philippines (66.4%), Vietnam (60.7%), Singapore (57%), Cambodia (50%), Thailand (45.1%), and Indonesia (37.7%).

The second most prevalent view regionally (35.3%) is that “China will provide alternative regional leadership in the wake of perceived US disengagement.” This is the top response from Brunei (61.4%), Malaysia (44.8%) and Myanmar (32.1%). Rounding up the top three views is the neutral response that “it is too early to ascertain China’s strategic intentions” (25.7%).

Less than one in ten respondents (8.9%) sees China as “a benign and benevolent power.” Country-level results

paint an equally pessimistic picture of China with only four countries breaking into modest double digits for this response: Laos (13.8%), Myanmar (13.1%), Cambodia (12.5%) and Indonesia (12.3%). This result, coupled with the majority view that China will be a revisionist power, is a wake-up call for China to burnish its negative image across Southeast Asia despite Beijing’s repeated assurance of its benign and peaceful rise.



Country	China will be a benign and benevolent power	China will remain a status quo power and continue to support the existing regional order	It is too early to ascertain China's strategic intentions at this moment	China will provide alternative regional leadership in the wake of perceived US disengagement	China will become a revisionist power with an intent to turn Southeast Asia into its sphere of influence
Brunei Darussalam	9.1%	38.6%	22.7%	61.4%	45.5%
Cambodia	12.5%	20.8%	16.7%	41.7%	50.0%
Indonesia	12.3%	24.6%	29.8%	36.0%	37.7%
Laos	13.8%	48.3%	17.2%	27.6%	24.1%
Malaysia	9.8%	30.1%	24.5%	44.8%	42.7%
Myanmar	13.1%	30.9%	26.8%	32.1%	22.6%
Philippines	8.2%	7.3%	17.3%	36.4%	66.4%
Singapore	3.1%	9.4%	37.5%	35.2%	57.0%
Thailand	7.1%	30.1%	19.5%	36.3%	45.1%
Vietnam	5.7%	9.0%	27.9%	17.2%	60.7%

Question 18

What is your perception of the Chinese-led Belt and Road Initiative (BRI)? (check those that apply)

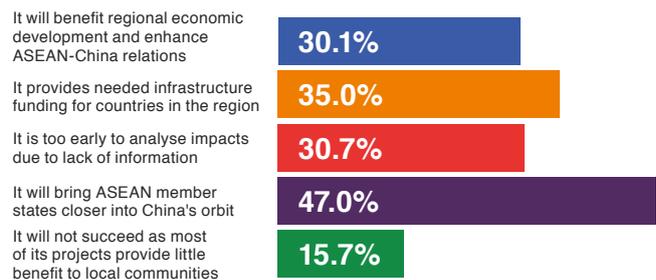
Answered: 996; Skipped: 12

Views on China’s flagship project – the Belt and Road Initiative (BRI) which was launched by President Xi Jinping in 2013 – are mixed. Close to half of the respondents (47%) think the BRI “will bring ASEAN member states closer into China’s orbit,” a finding that may have profound implications for Southeast Asia given the region’s concern that China will become a revisionist power. The fear of being drawn into China’s orbit is widely shared across seven ASEAN member states: Singapore (60.2%), Vietnam (58.7%), Brunei (52.3%), Malaysia (51.8%), Thailand (51.3%), Indonesia (44.4%) and the Philippines (38.7%).

On the other hand, China’s deep pockets in giving loans to provide “much needed infrastructure funding for countries in the region” are duly acknowledged. It showed up as the second most popular response (35%). However, the lack of transparency, which is sometimes associated with BRI projects, factored into the third most popular impression on the BRI. About one third of the respondents (30.7%) think that it is “too early to analyse BRI’s impact due to the lack of sufficient information.” Overall, 15.7% of the

respondents think the BRI “will not succeed as most of its projects provide little benefit to local communities.” This view is most evident in Vietnam (20.7%), Indonesia (19.1%), Malaysia (18.9%) and the Philippines (18.9%).

Laos has the most positive view on the BRI, with 75.9% thinking that the BRI will “benefit regional economic development and enhance ASEAN-China relations.” In neighbouring Cambodia, most respondents (70.8%) are also optimistic that the BRI “provides much needed infrastructure funding for countries in the region.”



Country	It will benefit regional economic development and enhance ASEAN-China relations	It provides needed infrastructure funding for countries in the region	It is too early to analyse impacts due to lack of information	It will bring ASEAN member states closer into China's orbit	It will not succeed as most of its projects provide little benefit to local communities
Brunei Darussalam	43.2%	43.2%	38.6%	52.3%	9.1%
Cambodia	41.7%	70.8%	20.8%	50.0%	8.3%
Indonesia	26.0%	38.3%	30.4%	44.4%	19.1%
Laos	75.9%	55.2%	6.9%	31.0%	3.5%
Malaysia	39.2%	42.0%	28.7%	51.8%	18.9%
Myanmar	29.8%	31.6%	32.7%	29.8%	10.1%
Philippines	27.0%	25.2%	34.2%	38.7%	18.9%
Singapore	22.7%	42.2%	37.5%	60.2%	14.1%
Thailand	37.2%	37.2%	16.8%	51.3%	16.8%
Vietnam	9.9%	13.2%	38.0%	58.7%	20.7%

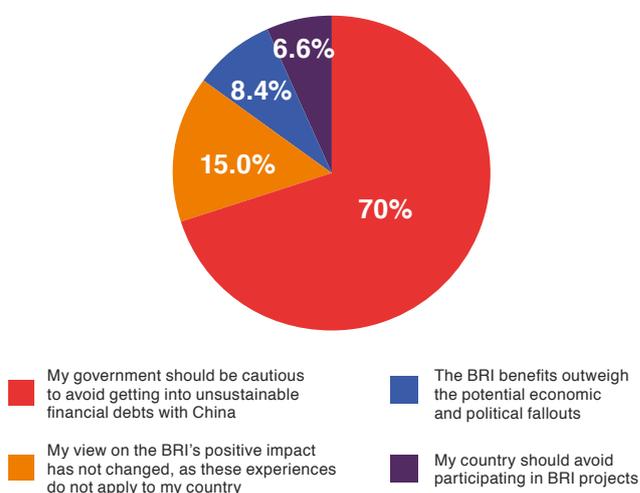
Question 19

In light of the experiences in Sri Lanka (Hambantota Port) and Malaysia (East Coast Rail Link), what is your view of BRI proposals in your country?

Answered: 806; Skipped: 74

Respondents from countries having BRI projects or are negotiating BRI projects (i.e. all ASEAN member states except Singapore) were then invited to comment on the lessons to be drawn for their respective country from past BRI projects, in particular the Hambantota port in Sri Lanka and the East Coast Rail Link (ECRL) in Malaysia. The overwhelming majority of the respondents (70%) opine that their government “should be cautious in negotiating BRI projects to avoid getting into unsustainable financial debts with China.” This reservation is noticeable in all nine ASEAN member states, and particularly strong in Malaysia (84.2%), the Philippines (78.6%), Thailand (72.7%), Indonesia (72.6%) and Cambodia (70.8%). The country least concerned over the debt issue is Laos where only 46.2% agree that their government should exercise prudence in negotiating BRI projects with China.

countries “avoid participating in BRI projects.” At the other end of the spectrum, 8.4% think that “the BRI benefits outweigh the potential economic and political fallouts.”



Notwithstanding the overall cautious perception of the BRI projects, only a small percentage (6.6%) prefer that their

Country	The BRI benefits outweigh the potential economic and political fallouts	My view on the BRI's positive impact has not changed, as these experiences do not apply to my country	My government should be cautious in negotiating BRI projects to avoid getting into unsustainable financial debts with China	My country should avoid participating in BRI projects
Brunei Darussalam	17.7%	14.7%	64.7%	2.9%
Cambodia	8.4%	20.8%	70.8%	0.0%
Indonesia	7.6%	12.2%	72.6%	7.6%
Laos	3.8%	42.3%	46.2%	7.7%
Malaysia	8.6%	1.4%	84.2%	5.8%
Myanmar	11.1%	20.9%	62.8%	5.2%
Philippines	10.7%	4.9%	78.6%	5.8%
Thailand	9.1%	13.1%	72.7%	5.1%
Vietnam	3.5%	18.4%	68.4%	9.7%

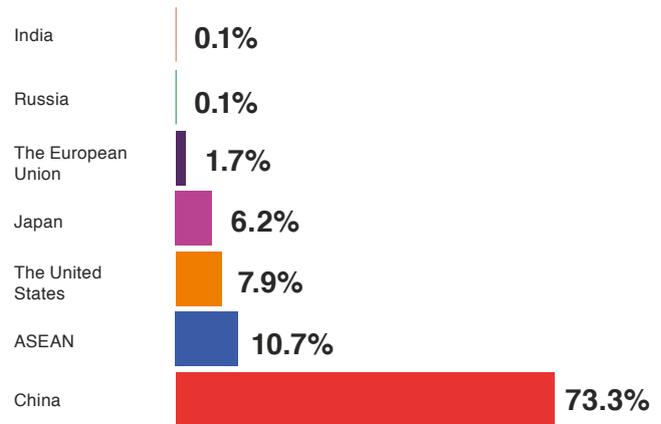
Question 20

In your view, which country/regional organisation has the most influence *economically* in Southeast Asia?

Answered: 1,000; Skipped: 8

Still, China's economic influence reigns supreme in the region, a view held by 73.3% of the respondents. The US trails by a considerable distance at 7.9%, followed by Japan (6.2%). The spread and consolidation of China's economic influence in the region is not entirely surprising as China has been ASEAN's largest trading partner since 2009 and bilateral trade crossed the US\$500 billion mark in 2017.

In one of the many surprise findings of this survey, Southeast Asians rank ASEAN (10.7%) higher than the US and Japan in economic influence over the region. ASEAN receives the second highest vote of confidence in Thailand (16.8%), the Philippines (14.4%), Laos (13.8%), Indonesia (10.4%), Malaysia (10.4%), Singapore (9.5%) and Cambodia (8.3%).



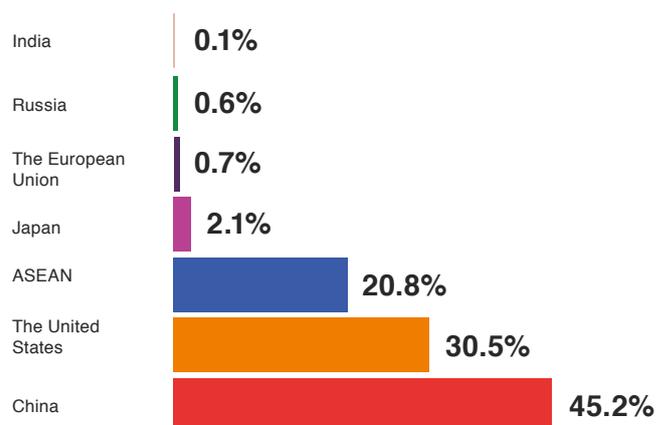
Country	ASEAN	China	The European Union	India	Japan	Russia	The United States
Brunei Darussalam	6.7%	80.0%	0.0%	0.0%	11.1%	0.0%	2.2%
Cambodia	8.3%	83.4%	8.3%	0.0%	0.0%	0.0%	0.0%
Indonesia	10.4%	81.7%	0.0%	0.0%	4.4%	0.0%	3.5%
Laos	13.8%	82.8%	3.4%	0.0%	0.0%	0.0%	0.0%
Malaysia	10.4%	78.4%	0.0%	0.0%	5.6%	0.0%	5.6%
Myanmar	8.8%	73.1%	1.7%	0.0%	9.4%	0.0%	7.0%
Philippines	14.4%	61.3%	4.5%	0.9%	6.3%	0.9%	11.7%
Singapore	9.5%	69.8%	3.2%	0.0%	2.4%	0.0%	15.1%
Thailand	16.8%	72.6%	0.9%	0.0%	7.1%	0.0%	2.6%
Vietnam	7.4%	68.0%	0.8%	0.0%	8.2%	0.0%	15.6%

Question 21

In your view, which country/regional organisation has the most influence *politically* and *strategically* in Southeast Asia?

Answered: 995; Skipped: 13

The conventional wisdom that China holds sway in the economic realm while the US wields its influence in the political-strategic domain will, however, need to be revisited in light of the survey results. 45.2% of the respondents consider China as having the most influence in political and strategic matters. This view is most pronounced in Brunei (53.4%), Vietnam (52.1%), and Cambodia (50%). In comparison, 30.5% think the US is still the most influential in this domain. ASEAN – which continues to surprise throughout the survey – obtains 20.8% of the vote share.



Country	ASEAN	China	The European Union	India	Japan	Russia	The United States
Brunei Darussalam	33.3%	53.4%	0.0%	0.0%	2.2%	0.0%	11.1%
Cambodia	20.8%	50.0%	0.0%	0.0%	0.0%	0.0%	29.2%
Indonesia	26.1%	40.9%	0.0%	0.0%	0.0%	0.0%	33.0%
Laos	27.6%	41.4%	0.0%	0.0%	3.4%	6.9%	20.7%
Malaysia	23.6%	43.7%	0.0%	0.0%	2.8%	0.0%	29.9%
Myanmar	20.6%	47.7%	2.3%	0.6%	5.3%	1.2%	22.3%
Philippines	20.9%	40.9%	0.0%	0.0%	1.8%	0.0%	36.4%
Singapore	17.0%	41.1%	0.8%	0.0%	0.0%	0.0%	41.1%
Thailand	15.9%	46.0%	1.8%	0.0%	1.8%	0.9%	33.6%
Vietnam	14.9%	52.1%	0.0%	0.0%	1.6%	0.8%	30.6%

Question 22

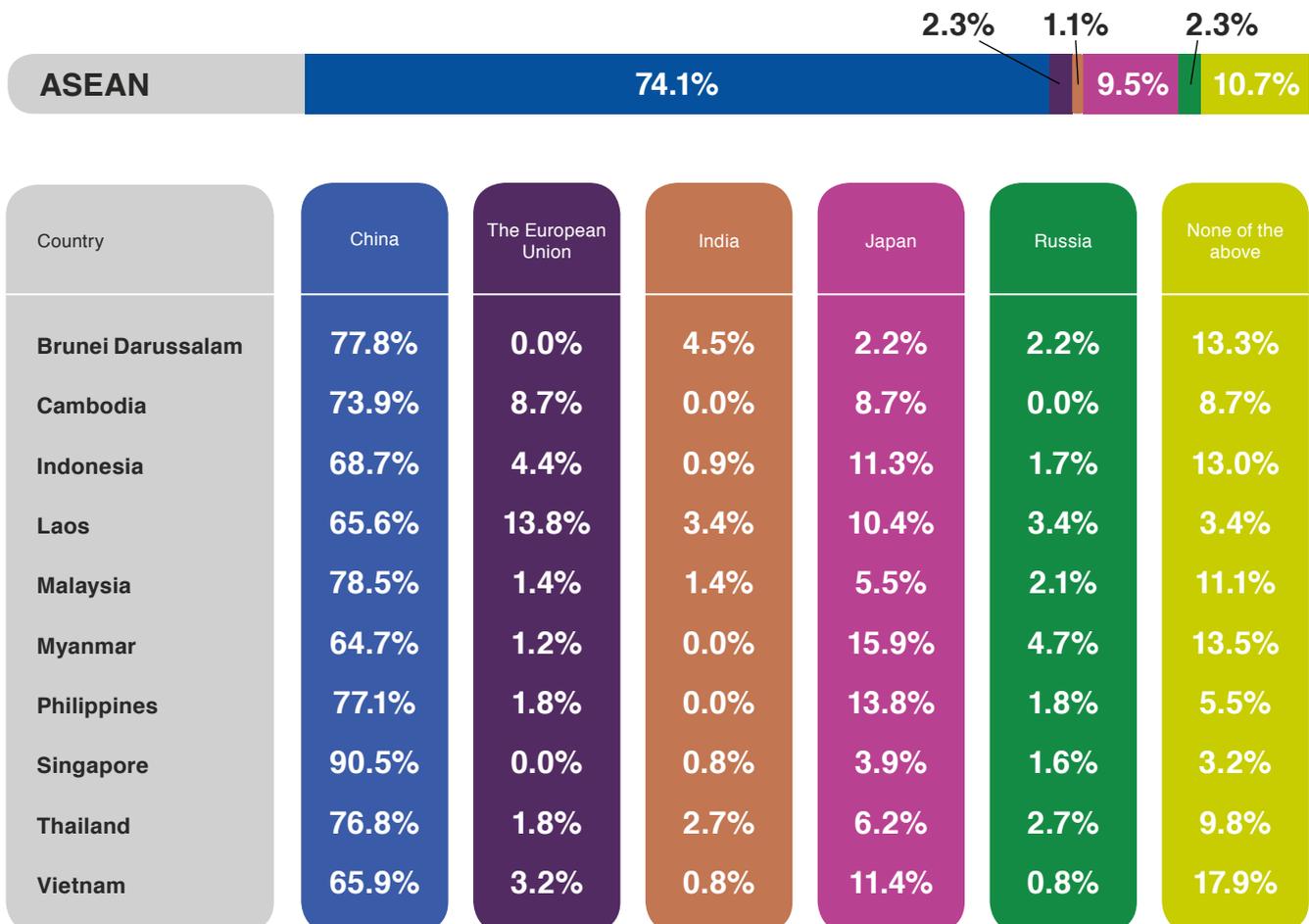
Which country do you think would most likely vie for regional leadership in response to the perceived growing indifference of the US towards Southeast Asia and ASEAN?

Answered: 997; Skipped: 11

China’s expanding influence from the economic realm into the political-strategic sphere is preparing the ground for Beijing to take on the region’s leadership mantle. About three out of four Southeast Asians (74.1%) expect China “to vie for political leadership in response to the growing indifference of the US towards Southeast Asia and ASEAN.” This view is most widely shared in Singapore (90.5%), Malaysia (78.5%), Brunei (77.8%), the Philippines (77.1%) and Thailand (76.8%).

closest major power that could possibly contest for regional leadership is Japan, but its prospect appears dim with support from only 9.5% of the respondents. Japan is the second alternative in Myanmar (15.9%), the Philippines (13.8%), Cambodia (8.7%) and Singapore (3.9%). The EU receives nods as the second alternative in Laos (13.8%) and Cambodia (8.7%). India’s leadership role earns some recognition in Brunei (4.5%), Laos (3.4%) and Thailand (4.7%), and Russia fares almost similarly in Myanmar (4.7%), Laos (3.4%) and Thailand (2.7%).

The region does not see any viable leadership other than China to replace the US among other possible contenders – the European Union (EU), India, Japan or Russia. The



Question 23

Do you think the US and China are on a collision course in Southeast Asia?

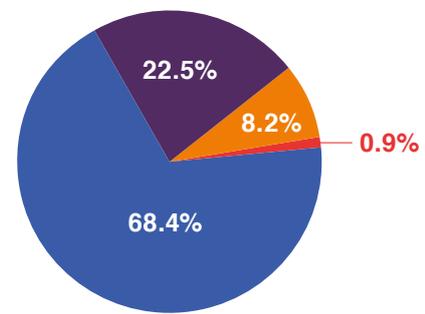
Answered: 997; Skipped: 11

China has not been shy about its ambition to regain its rightful place in global affairs, and Southeast Asia will be a test bed for Beijing in this respect. At the same time, the US will not give up its “primacy” without a fight. Are China and the US on a collision course in Southeast Asia? Most respondents (68.4%) think so, as they view “both countries see each other as strategic competitors.” This perspective is most pronounced in Malaysia (74.0%), Myanmar (73.5%), and Indonesia (72.2%).

At the other end of the spectrum, only 22.5% of the respondents expect China and the US to “resolve their differences and agree to a working relationship.” Most of these optimists are found in Vietnam (31.7%), Thailand (25.7%) and the Philippines (25.5%).

Also a significant number of respondents (62%) worry that ASEAN is “becoming the arena of major power competition.” If reality plays out to this projection, regional

politics will be more polarised and ASEAN member states will need to muster all their resourcefulness to avoid being a pawn in either China’s or the US’s power games.



Country	Yes, both countries see each other as strategic competitors	No, the US will cede the leadership role in the region to China	No, China will accept the US' leadership role in the region	No, the US and China will resolve their differences and agree to a working relationship
Brunei Darussalam	54.6%	22.7%	2.3%	20.4%
Cambodia	70.8%	8.3%	4.2%	16.7%
Indonesia	72.2%	8.7%	0.9%	18.2%
Laos	69.0%	10.3%	0.0%	20.7%
Malaysia	74.0%	4.9%	1.4%	19.7%
Myanmar	73.5%	8.2%	0.6%	17.7%
Philippines	70.9%	2.7%	0.9%	25.5%
Singapore	65.4%	10.2%	0.8%	23.6%
Thailand	62.8%	10.6%	0.9%	25.7%
Vietnam	61.8%	6.5%	0.0%	31.7%

Question 24

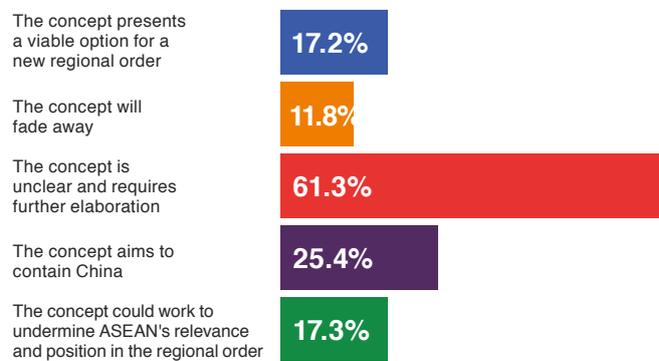
How do you view the Indo-Pacific concept?
(check those that apply)

Answered: 989; Skipped: 19

The survey findings suggest that the US’ response to parry China’s strategic gains in the region through the Indo-Pacific strategy is unlikely to make any headway. The majority of the respondents (61.3%) think the concept is “unclear and requires further elaboration.” In other words, this is the region’s call for clarity and specificity from the proponents of the Indo-Pacific concept. Lingering doubts of the Indo-Pacific’s “hidden agenda” are also evident as a quarter of the respondents (25.4%) think the “concept aims to contain China” while 17.3% see the concept as working to “undermine ASEAN’s relevance and position in the regional order.”

A methodological note is in order to put these numbers into perspective. This specific question gives respondents the freedom to choose multiple responses. Another way of interpreting the findings is that 74.6% of the respondents do not think that the Indo-Pacific concept aims to contain

China. Nevertheless, support for the Indo-Pacific remains low as only 17.2% think the concept “presents a viable option for a new regional order,” with the strongest support coming from Laos (31%) and the Philippines (26.4%), Indonesia (24.8%) and Cambodia (20.8%).



Country	The concept presents a viable option for a new regional order	The concept will fade away	The concept is unclear and requires further elaboration	The concept aims to contain China	The concept could work to undermine ASEAN's relevance and position in the regional order
Brunei Darussalam	17.8%	11.1%	66.7%	20.0%	22.2%
Cambodia	20.8%	16.7%	45.8%	37.5%	29.2%
Indonesia	24.8%	9.7%	62.8%	15.9%	12.4%
Laos	31.0%	3.5%	65.5%	6.9%	10.3%
Malaysia	13.3%	12.6%	64.3%	31.5%	24.5%
Myanmar	15.0%	12.6%	47.9%	24.6%	14.4%
Philippines	26.4%	9.4%	58.5%	17.0%	15.1%
Singapore	8.7%	15.0%	72.4%	34.7%	21.3%
Thailand	12.5%	14.3%	67.0%	27.7%	17.9%
Vietnam	18.7%	9.8%	60.2%	27.6%	12.2%

SECTION IV: PERCEPTION OF TRUST

Which major power does the region trust the most?

The survey invited the respondents to share how confident they are that the major powers – China, the European Union, India, Japan and the United States – will “do the right thing” in contributing to global peace, security, prosperity and governance.

Question 25

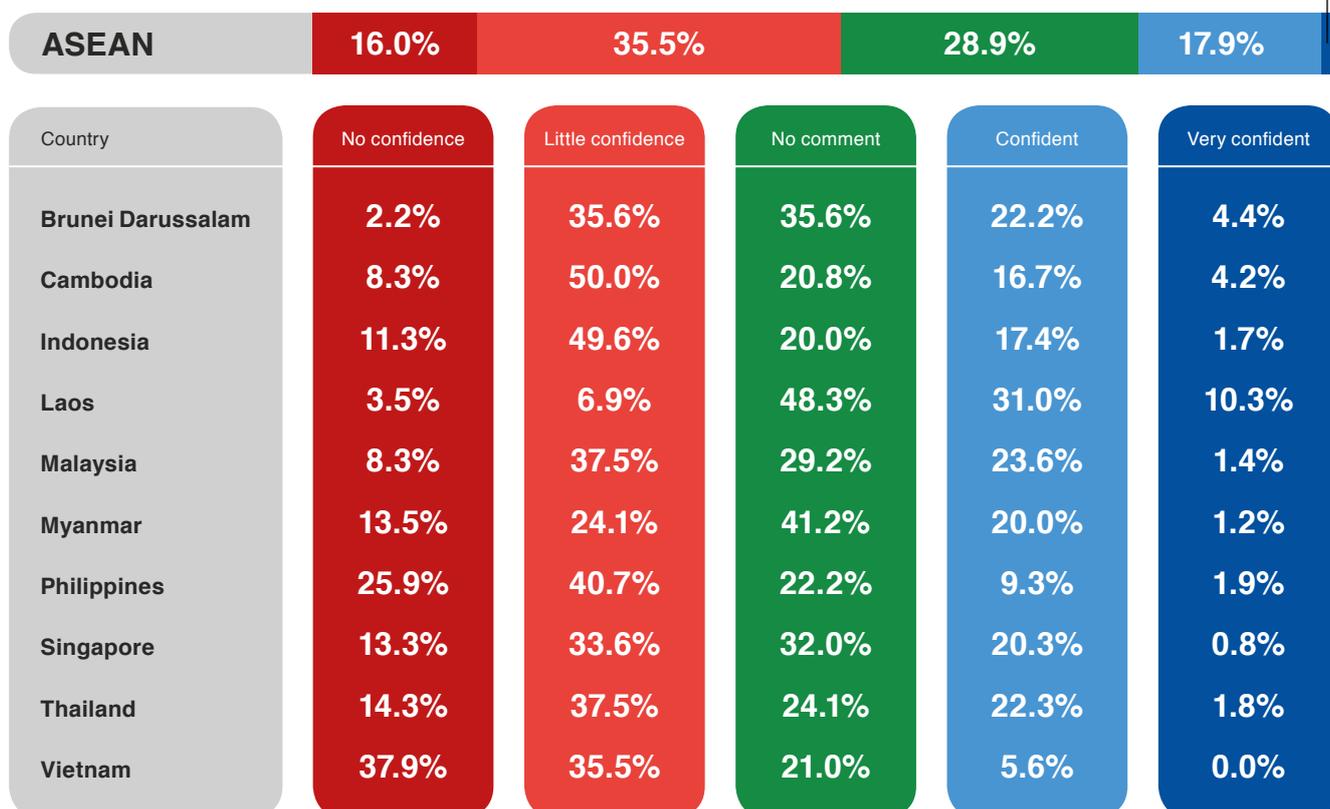
How confident are you that **China** will “do the right thing” in contributing to global peace, security, prosperity and governance?

Answered: 999; Skipped: 9

The majority of the respondents (51.5%) have either little (35.5%) or no confidence (16%) that China will “do the right thing” in contributing to global peace, security, prosperity and governance. Less than one in five respondents (19.6%) has positive views on China in this respect, with 17.9% and 1.7% of the respondents respectively indicating their “confidence” and “high confidence.” The top three countries with negative views on China are Vietnam (73.4%), the Philippines (66.6%) and Indonesia (60.9%). It is noteworthy that the degree

of trust in China among the respondents from Cambodia – largely seen as a “China-leaning” state – is low. More than half of Cambodian respondents (58.3%) have little or no confidence in China, outnumbering the positive views (20.9%) by more than two to one. Bucking this trend of negative views is Laos where 41.3% of the respondents are either confident or very confident that China will “do the right thing.” Laos is the only country to register more than 30% positive views on China, followed by Brunei (26.6%) and Malaysia (25%).

1.7%



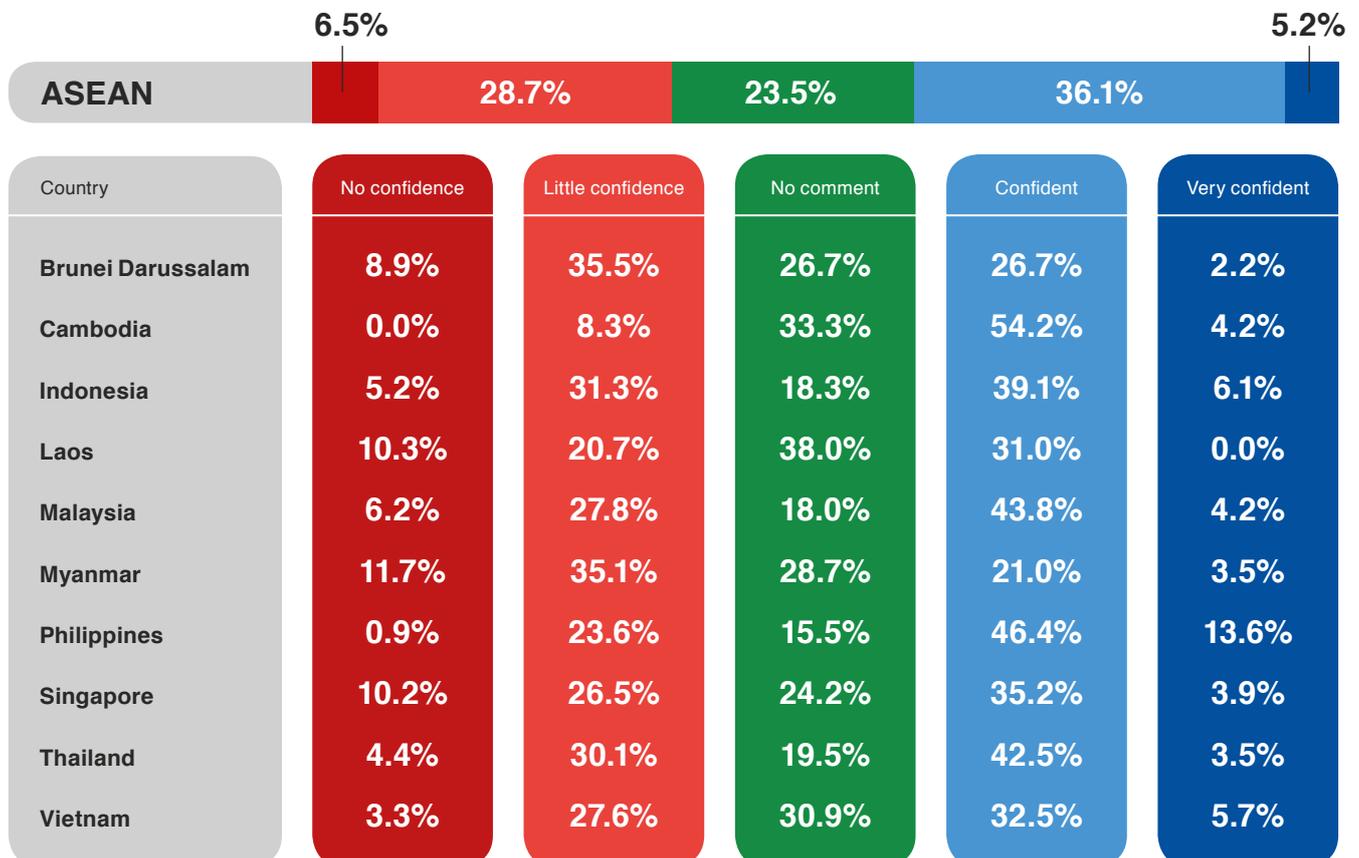
Question 26

How confident are you that the **European Union** will “do the right thing” in contributing to global peace, security, prosperity and governance?

Answered: 1,002; Skipped: 6

Southeast Asians have a positive view of the EU, with 41.3% feeling “confident” (36.1%) and “very confident” (5.2%) that the EU will “do the right thing.” In comparison, 35.2% take the opposing view, with 28.7% having “little confidence” and 6.5% having “no confidence.” The EU is most trusted in the Philippines (60%), Cambodia (58.4%)

and Malaysia (48%). EU diplomacy needs to work harder in Myanmar and Brunei which have the highest level of “little confidence” and “no confidence” responses at 46.8% and 44.4% respectively.



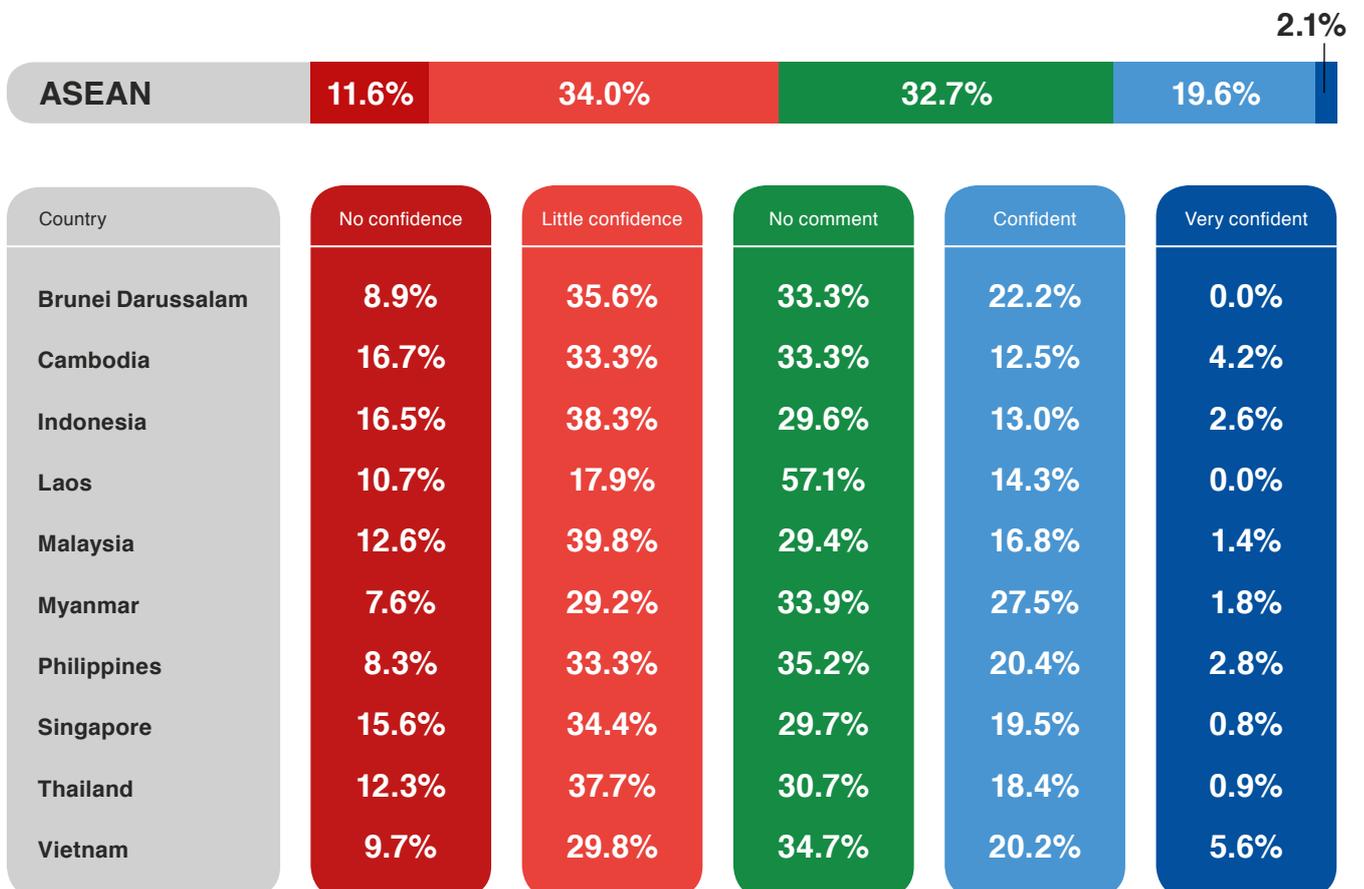
Question 27

How confident are you that **India** will “do the right thing” in contributing to global peace, security, prosperity and governance?

Answered: 1,000; Skipped: 8

India does not fare too well in the survey with negative views outnumbering positive ones by two to one. 45.6% of the respondents have either “little confidence” (34%) or “no confidence” (11.6%) in India, compared to 21.7% who are “confident” (19.6%) or “very confident” (2.1%). Nearly a third of the respondents (32.7%) opt for the “no comment” response. Negative views are most prevalent in Indonesia

(54.8%), Malaysia (52.4%), Cambodia (50%), Singapore (50%) and Thailand (50%). The largest pool of positive responses are found in Myanmar (29.3%), Vietnam (25.8%) and the Philippines (23.2%).



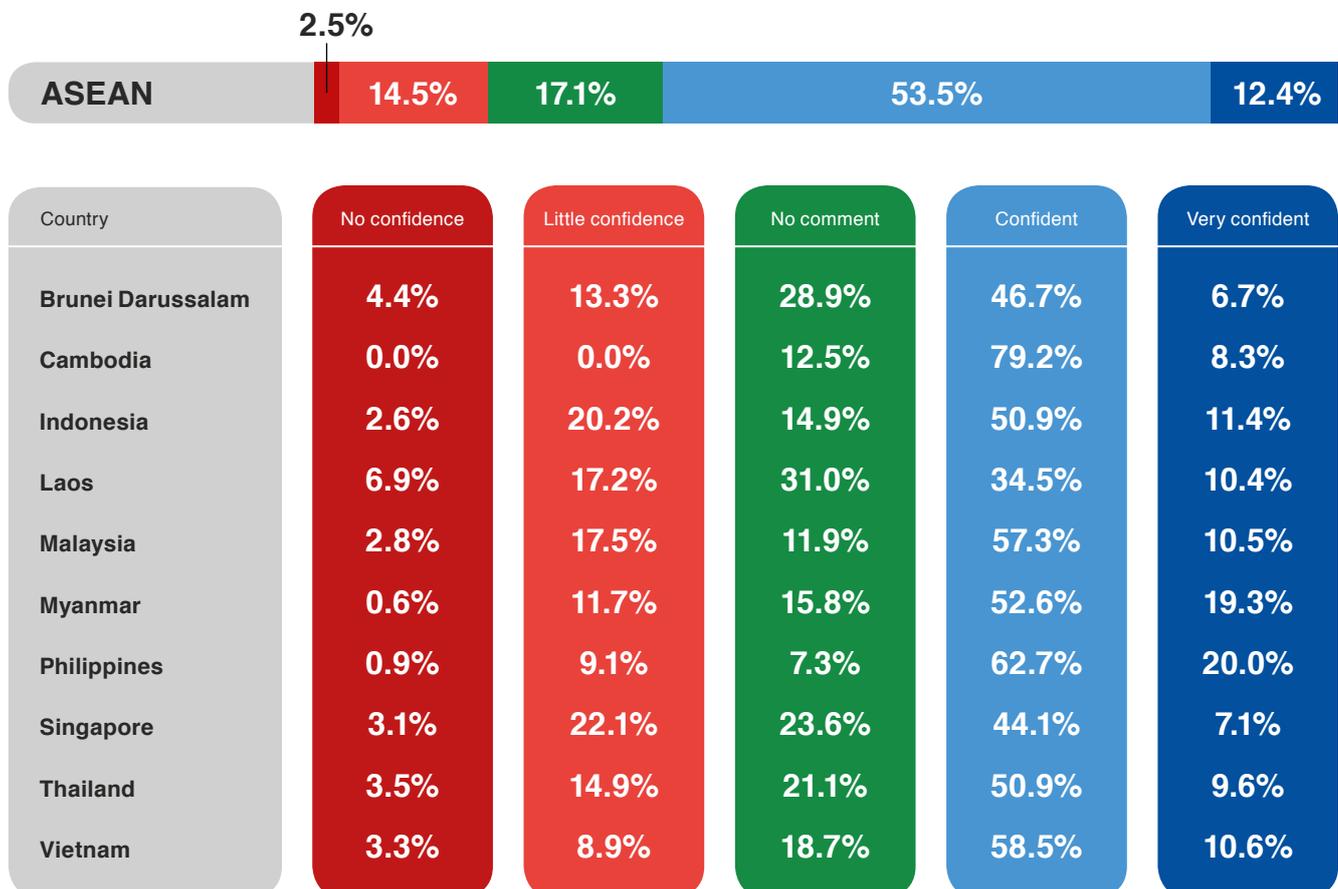
Question 28

How confident are you that **Japan** will “do the right thing” in contributing to global peace, security, prosperity and governance?

Answered: 1,000; Skipped: 8

Japan is viewed most favourably by Southeast Asians. Nearly two-thirds of all respondents (65.9%) are either “confident” (53.5%) or “very confident” (12.4%) that Japan will “do the right thing” in global affairs. The percentage of 65.9% is the highest among all major powers, effectively earning Japan the mantle of the most trusted major power in the region. The level of trust in Japan is highest in

Cambodia (87.5%), the Philippines (82.7%) and Myanmar (71.9%). The level of distrust on Japan (17%) is the lowest among the major powers. Reservations on the Land of the Rising Sun’s role in global affairs are highest in Singapore (25.2%), Laos (24.1%) and Indonesia (22.8%). Japan is the only major power in the survey to receive “positive views” as the top response in all ASEAN member states.



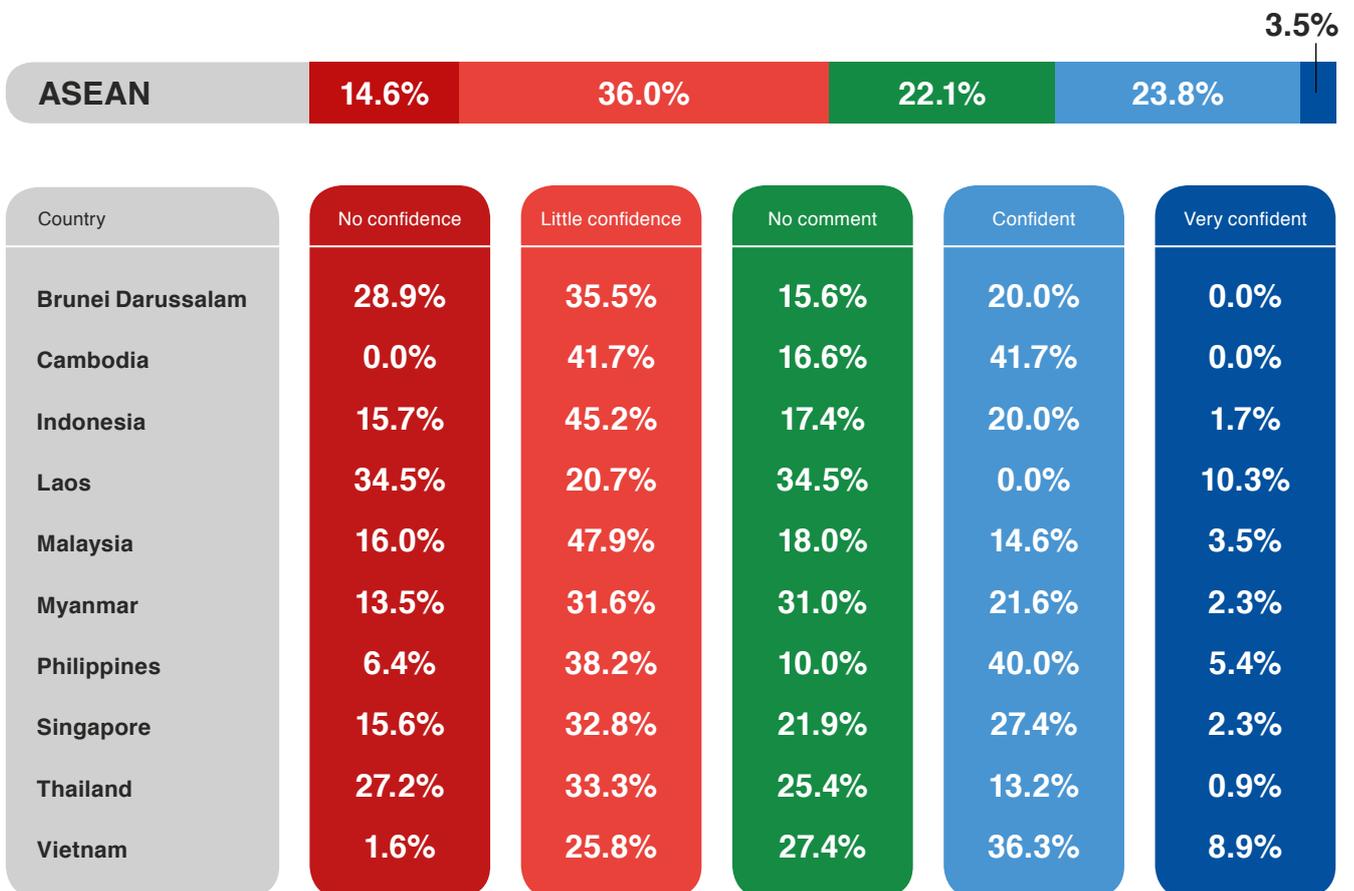
Question 29

How confident are you that the **United States** will “do the right thing” in contributing to global peace, security, prosperity and governance?

Answered: 1,004; Skipped: 4

Southeast Asians’ perceptions of the US are gloomy. 50.6% of the respondents have “little confidence” (36%) or “no confidence” (14.6%) in the US to “do the right thing” in global affairs. The US’ withdrawal from the Paris Climate Change agreement and its sustained railing against free trade and disdain for multilateralism probably feed into these pessimistic views of the US. Negative views

are prevalent in all ASEAN member states except the Philippines and Vietnam where 45.4% and 45.2% of the respective respondents keep their faith in the US. More pessimistic views are found in Brunei (64.4%), Malaysia (63.9%), Indonesia (60.9%) and Thailand (60.5%).

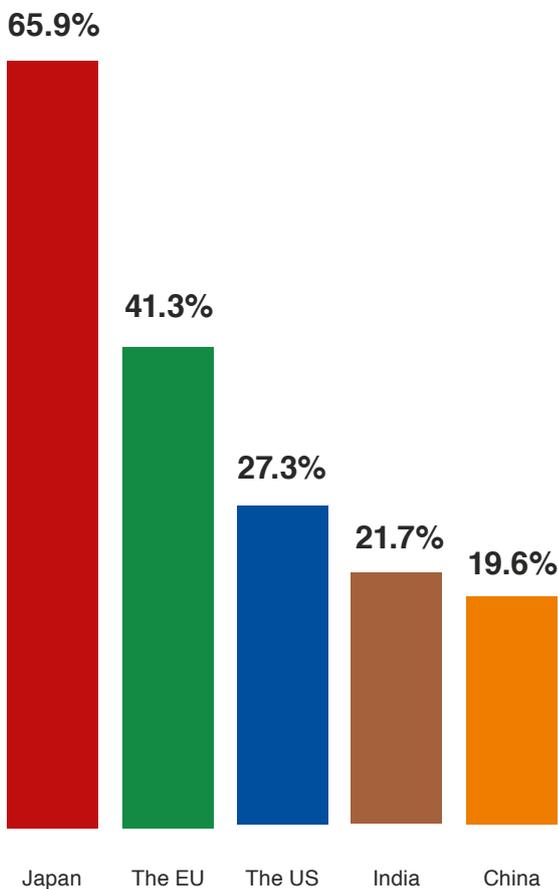


Analysing the "trust issue" among Southeast Asians

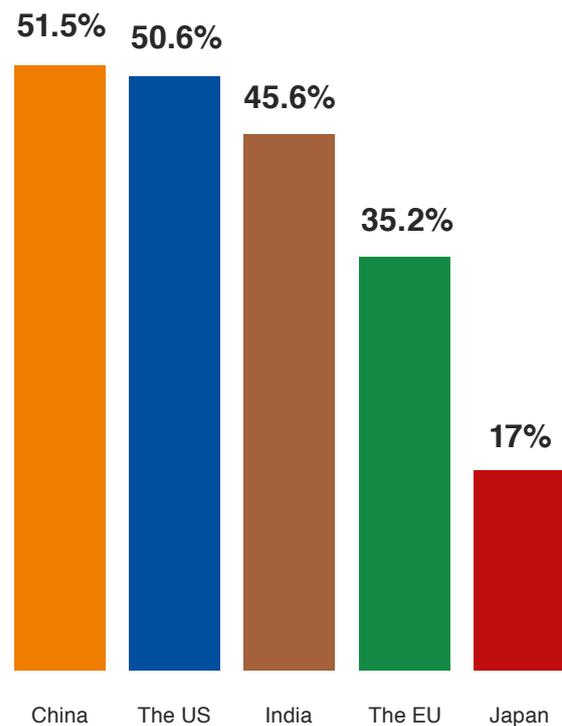
The “trust” rankings of the major powers based on the combined “positive responses” of the respondents are as follows: Japan (65.9%), the EU (41.3%), the US (27.3%), India (21.7%) and China (19.6%). Conversely, the

“distrust” rankings of the major powers are as follows: China (51.5%), the US (50.6%), India (45.6%), the EU (35.2%), and Japan (17%).

Perception of trust of the major powers in Southeast Asia



Perception of distrust of the major powers in Southeast Asia



Four additional observations are worth pointing out:

- a) The number of “distrust” responses (58.3%) is significantly higher than the “trust” ones (20.9%) among Cambodian respondents vis-à-vis China, which is surprising considering the general perception of Cambodia’s “closeness” to China;
- b) The number of “trust” responses on Japan among the Philippine respondents (82.7%) is the second highest among all ASEAN member states, suggesting that “war memories” are no longer the Achilles’ heel in the Philippines-Japan relations. This result, when read together with the “negative responses” on China, which is the second highest (66.6%) in ASEAN, may require us to rethink our understanding of Manila’s perceived shift towards Beijing;
- c) Confidence in the US is relatively low in three ASEAN member states that traditionally have the closest relations with Washington. Thailand – which is the US’ non-NATO treaty ally – has the second lowest positive rating of the US (14.1%). The numbers in the Philippines (45.4%) and Singapore (29.7%) are much better, but still fail to mask the fact that the US does not receive a majority vote of confidence among its closest regional friends; and
- d) While China is regarded as the most influential major power in both economic and political-strategic domains and is expected to assume a larger leadership role in the region, its expanding influence has not inculcated a sense of confidence in its conduct of global affairs. Conversely, Japan, which is not as highly regarded as either China or the US in hard power and regional influence, is widely seen as the most trusted major power in the region.

SECTION V: SOFT POWER AND REGIONAL INFLUENCE

The last cluster of questions in the survey look at the application of soft power in the region, namely:

- (a) Which country would be your first choice if you (or your child) were offered a scholarship to a university?;
- (b) Which country is your favourite destination to visit, or would like to visit in the near future; and
- (c) Which foreign language do you think is the most useful and beneficial for your work and professional development?

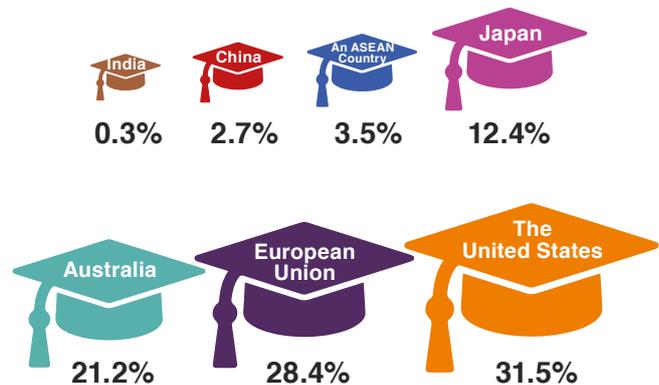
Collectively, these three indicators provide some insights on the strength of soft power.

Question 30

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

Answered: 1,000; Skipped: 8

The top choice for tertiary education is the US with about one third of the respondents (31.5%) choosing American universities as their most preferred destination. America's popularity is followed by the EU (28.4%), Australia (21.2%) and Japan (12.4%). More Southeast Asians prefer an ASEAN member state (3.5%) over China (2.7%) for their higher education. Preference for American universities is notably highest in Singapore (48%), Vietnam (41.9%) and Thailand (35.4%). The EU is the most preferred choice in Brunei (53.3%), Indonesia (41.7%), Malaysia (34.5%), Thailand (35.4%, jointly with the US) and the Philippines (30.9%). Japan is the top choice in Myanmar (29.2%), while Cambodian (50%) and Lao (31%) respondents prefer Australian universities.



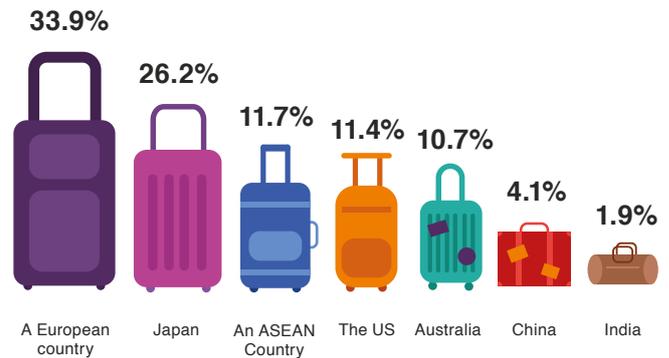
Country	An ASEAN country	Australia	China	India	A European country	Japan	The US
Brunei Darussalam	4.5%	20.0%	0.0%	0.0%	53.3%	11.1%	11.1%
Cambodia	8.3%	50.0%	4.2%	0.0%	0.0%	4.2%	33.3%
Indonesia	3.5%	22.6%	1.8%	0.0%	41.7%	7.8%	22.6%
Laos	6.9%	31.0%	10.4%	0.0%	17.2%	13.8%	20.7%
Malaysia	1.4%	26.8%	0.0%	0.0%	34.5%	11.3%	26.0%
Myanmar	5.3%	24.6%	0.6%	0.6%	11.7%	29.2%	28.0%
Philippines	5.5%	17.3%	3.6%	0.0%	30.9%	13.6%	29.1%
Singapore	2.3%	7.1%	7.1%	0.0%	32.3%	3.2%	48.0%
Thailand	2.6%	10.6%	6.2%	1.8%	35.4%	8.0%	35.4%
Vietnam	1.6%	29.0%	0.0%	0.0%	18.6%	8.9%	41.9%

Question 31

Which country is your favourite destination to visit, or would like to visit in the near future?

Answered: 999; Skipped: 9

Europe is Southeast Asians' dream vacation destination with 34% respondents selecting a European country as their favourite spot. About one in four respondents (26.2%) looks forward to experiencing Japan in their travel plan. Rounding up the top three travel destinations is an ASEAN member state (11.7%). The fact that ASEAN edges out what are thought to be more popular destinations such as the US (11.4%), Australia (10.7%), China (4.1%) and India (1.9%) is a healthy sign that Southeast Asians are gaining a sense of regional affinity and show a higher interest in their ASEAN neighbours. Europe is the most popular tourist destination among the respondents in all ASEAN member states except Singapore and Thailand, which prefer Japan above all others.



Country	An ASEAN country	Australia	China	India	A European country	Japan	The US
Brunei Darussalam	17.8%	11.1%	0.0%	2.2%	31.1%	24.5%	13.3%
Cambodia	16.7%	25.0%	0.0%	0.0%	37.5%	12.5%	8.3%
Indonesia	13.0%	10.4%	6.1%	0.9%	37.4%	20.9%	11.3%
Laos	10.3%	17.2%	3.5%	3.5%	51.7%	10.3%	3.5%
Malaysia	14.0%	11.2%	2.1%	4.9%	31.5%	27.2%	9.1%
Myanmar	8.8%	16.5%	4.7%	0.0%	33.5%	25.3%	11.2%
Philippines	14.7%	4.6%	1.8%	0.0%	42.2%	24.8%	11.9%
Singapore	15.0%	7.1%	4.7%	1.6%	26.0%	34.6%	11.0%
Thailand	8.9%	4.4%	6.2%	4.4%	32.7%	36.3%	7.1%
Vietnam	5.6%	12.9%	5.6%	1.6%	32.3%	21.8%	20.2%

Question 32

Which foreign language do you think is the most useful and beneficial for your work and professional development?
(check those that apply)

Answered: 1,004; Skipped: 4

The English language is the most popular foreign language in the region. An overwhelming majority (91.3%) of the respondents consider it “the most useful and beneficial for their work and professional development.” 44.7% consider Mandarin to be “useful and beneficial”, much lower than English but not an insignificant number, which speaks to China’s growing economic, political and cultural influence and the increasing use of Mandarin in trade, commerce and tourism in the region. The recognition of the importance of Mandarin is highest in Singapore (71.1%), Brunei (62.2%), Malaysia (55.9%) and Indonesia (54%).



Country	English	French	German	Hindi	Japanese	Korean	Mandarin
Brunei Darussalam	91.1%	13.3%	4.4%	8.9%	11.1%	15.6%	62.2%
Cambodia	100.0%	12.5%	0.0%	0.0%	4.2%	8.3%	37.5%
Indonesia	91.3%	15.7%	10.4%	1.7%	16.5%	3.5%	54.0%
Laos	100.0%	10.3%	0.0%	3.5%	6.9%	0.0%	24.1%
Malaysia	89.7%	20.7%	5.5%	2.8%	21.4%	5.5%	55.9%
Myanmar	98.3%	8.8%	4.1%	0.0%	13.5%	0.0%	18.7%
Philippines	91.8%	17.3%	3.6%	0.9%	19.1%	9.1%	44.6%
Singapore	81.3%	18.8%	10.9%	7.0%	21.1%	8.6%	71.1%
Thailand	84.2%	12.3%	7.0%	2.6%	14.9%	3.5%	49.1%
Vietnam	96.8%	6.5%	3.3%	1.6%	9.8%	3.3%	27.6%

Reading the Soft Power “tea leaves”

Overall, Western soft power is still dominant in Southeast Asia. Collectively, 81.1% of the respondents favour “Western education” (i.e., US, European and Australian tertiary institutions); 56.1% pick Europe, the US and Australia as their favourite destinations to visit; the English language is overwhelmingly considered the most useful and beneficial foreign language in the region.

Japan is the most successful non-Western/Asian “soft power nation” in Southeast Asia. It ranks the fourth (after the US, the EU, Australia) as the preferred choice of tertiary education. It is the second most preferred destination to visit. And the Japanese language is the third most popular foreign language after English and Mandarin.

From a micro perspective, the results of this survey suggest that Chinese soft power penetration in mainland Southeast Asia (Cambodia, Laos, Myanmar, Thailand

and Vietnam) is surprisingly low despite the popular belief that these countries have a closer cultural affinity with China. Chinese universities are the least preferred choice for higher education among respondents from Myanmar and Vietnam. In terms of tourism appeal, China ranks the second last, before only India. China’s most potent soft power tool is the Mandarin language. Even then, the number of respondents in mainland Southeast Asia choosing Mandarin as the “most useful and beneficial foreign language” is surprisingly lower than in maritime Southeast Asia: Thailand (49.1%), Cambodia (37.5%), Laos (24.1%), Vietnam (27.6%) and Myanmar (18.7%). The low appeal of Chinese education institutions and tourism and moderate interest in its national language are critical soft power challenges for China in the region. However, we caution the readers to digest these findings with the caveat that elite thinking may not necessarily reflect popular views.

The State of Southeast Asia: 2019 Survey Report has been featured in the following 90 news outlets and online platforms around the world since a summary of its findings was published in ASEANFocus (Issue 1/2019):

- ABS-CBN News • Al Jazeera • ASEAN Post • Asia Times • Asian Correspondent •
- Asian News International • The Bangkok Post • Báo Người Lao Động • BBC News Tiếng Việt •
- BenarNews • Bisnis.com • The Borneo Bulletin • The Borneo Post • Breitbart • Business Standard •
- The Business Times • BusinessWorld • The Cambodia Daily • Channel NewsAsia • China Digital Times •
- China Economic Review • CNBC • Dan Tri • Dat Viet • The Dhaka Tribune • The Economic Times •
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