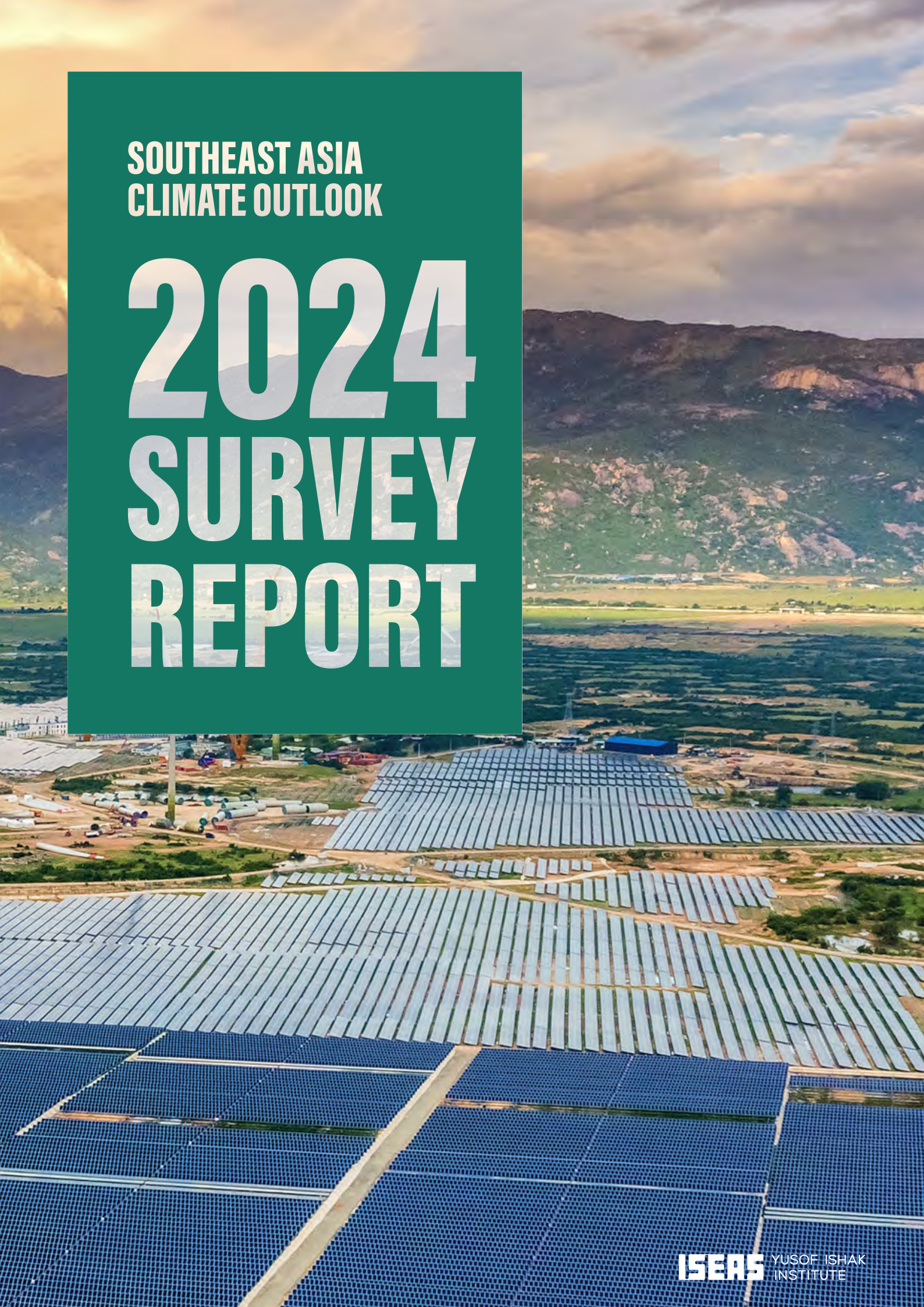
SOUTHEAST ASIA CLIMATE OUTLOOK

2024 SURVEY REPORT



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If you have any comments or enquiries about the survey,
please email us at climatechange@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) and the Singapore APEC Study Centre.

The Climate Change in Southeast Asia Programme (CCSEAP) was established in 2020 to examine the phenomenon of climate change, its impact, and policy responses across the regions. The Programme hopes to cultivate a network of scholars at the forefront of climate change research and build on ISEAS' thought leadership to advance climate discourse and knowledge in Southeast Asia through a series of publications and seminars.

The Programme conducts an annual Southeast Asia Climate Outlook survey. Inaugurated in 2020, the survey probes the attitudes and concerns of Southeast Asian citizens towards climate change, governmental actions, and the role of different stakeholders in climate action. It aims to obtain views on climate change impacts, mitigation, adaptation, food security, agricultural production, city-level climate measures, renewable energy and the transition to low-carbon economies.

The report can be cited as: Seah, S. et al., Southeast Asia Climate Outlook: 2024 Survey Report (Singapore: ISEAS - Yusof Ishak Institute, 2024)

CONTENTS

ABOUT THE SURVEY

As Southeast Asia faces unprecedented climate challenges, from record-breaking heat waves to severe droughts and floods, the urgency of addressing climate change has never been greater. The *Southeast Asia Climate Outlook Survey 2024* seeks to capture the evolving perceptions, concerns, and expectations of Southeast Asians regarding climate change and the actions required to mitigate its impacts.

Since its inception in 2020, this annual survey has served as a crucial barometer for policymakers, businesses, and civil society, providing insights into regional sentiments on climate change, the effectiveness of government policies, and the roles of various stakeholders in climate action. The 2024 edition continues this tradition, focusing on key issues such as climate transition, leadership, and the specific climate threats faced by the region.

This year's survey reflects the voices of 2,931 respondents from across the ten ASEAN member states, offering a comprehensive overview of public opinion on topics ranging from renewable energy adoption to food security in the face of climate change. The findings highlight both the progress made and the significant challenges that remain as Southeast Asia strives to build a climate-resilient future.

Section I presents the respondents' profile including nationality, age, gender, education, affiliation, self-determined socio-economic status versus reported household income, country and city of residence and source of climate news.

Section II presents issues relating to present climate experiences, anticipated climate impacts, including on personal health, food security, stakeholder responsibility, burden of cost, views of regional governments' effectiveness so far, individual climate action and climate advocacy.

Section III presents energy transition and mitigation issues relating to fossil fuel phase outs, potential sources of clean energy, national carbon tax, regional action to accelerate transition.

Section IV presents global and regional climate leadership views.

We invite you to explore the results of this survey, which not only underscore the critical importance of climate action in Southeast Asia but also provide a platform for informed dialogue and concerted efforts toward a sustainable and resilient region.

METHODOLOGY

The Survey was conducted online over a period of five weeks from 10 July to 17 August 2024. The survey comprised 39 questions in total and was completed in a median time of 13.3 minutes. A total of 2,931 Southeast Asian respondents (aged 16 and above) from ten ASEAN member states completed the online survey which drew from eight categories of affiliation:

(1) Academia, Think-tanks and Research Institutions;
(2) Private Sector;
(3) Government;
(4) Regional organisations, inter-government and international organisations;
(5) Civil society and non-government organisations;
(6) Media;
(7) Students;
(8) Retirees and Others.[1]

The survey was offered in English and translated into five languages - Bahasa Indonesia, Burmese, Khmer, Thai, and Vietnamese.

The data is weighted by country population size and gender demographics using the World Population Prospects 2022 published by the United Nations' Department of Economic and Social Affairs and Population Division[2] and the ASEAN Statistical Highlights 2022 published by the ASEAN Secretariat[3]. Responses from countries who make up a larger share of the ASEAN population are given corresponding weights to reflect more accurately the population being studied, while maintaining the gender balance. This is with the exception of Questions 33-34 and 36-39, for which regional averages are derived from a 10% equal weightage for each country to reflect ASEAN's regional consensus-decision making.

Breakdown by combined household income are based on within-country income quintiles. Respondents were sorted into five income categories representing household income within their respective countries wherever possible. The household income ranges for each quintile were derived based on a range of sources, including government statistics of median household income by decile or quintile, national income surveys and the World Inequality Database. Where such data was not available for Myanmar and Laos, we referred to income categories used for past censuses which may not reflect the exact income range by quintile.

Time series numbers from past Surveys have also been weighted accordingly and may differ from those reported in their respective Survey Reports (which were either unweighted or weighted according to different demographics). These weightages only apply to region-wide numbers and do not affect breakdowns by country, affiliation, age or other groups.

Should any readers require clarification on the methodology, please email climatechange@iseas.edu.sg.

[1] The category "Others" include those who identify as freelance, gig-economy or unemployed persons.

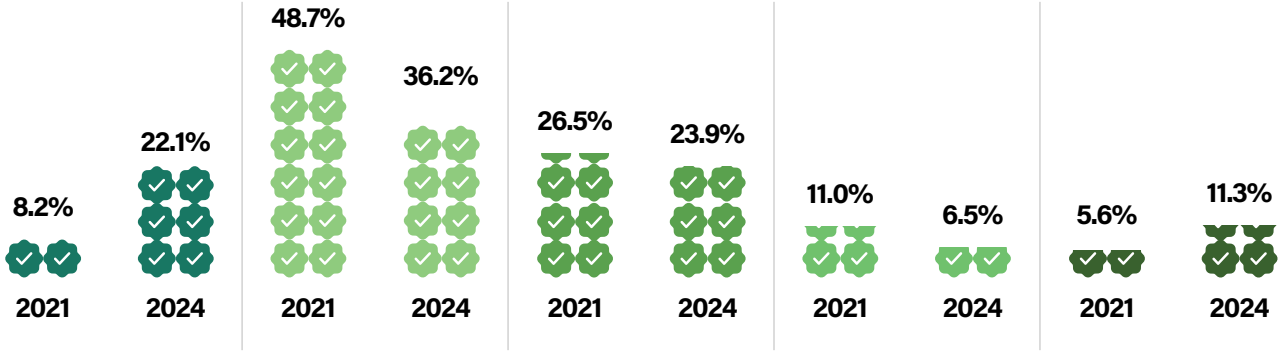
[2] United Nations Department of Economic and Social Affairs and Population Division, "World Population Prospects 2022, Online Edition."

[3] ASEAN Secretariat, "ASEAN Statistical Highlights 2022."

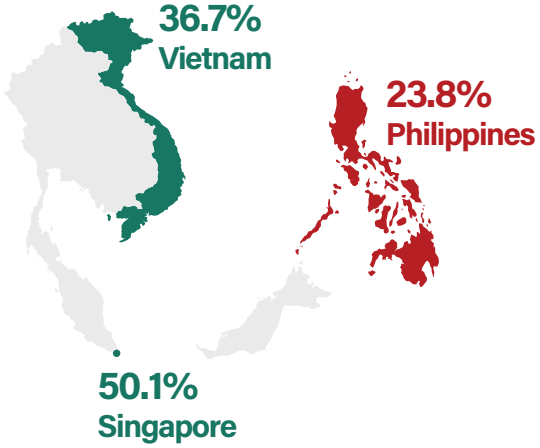
HIGHLIGHTS

01 GOVERNMENT SCORECARD

Compared to 2021, more respondents have a positive view of their governments' response to climate change. This year, Singapore and Vietnam respondents were the most approving of their governments, while Philippines respondents were the most disapproving.



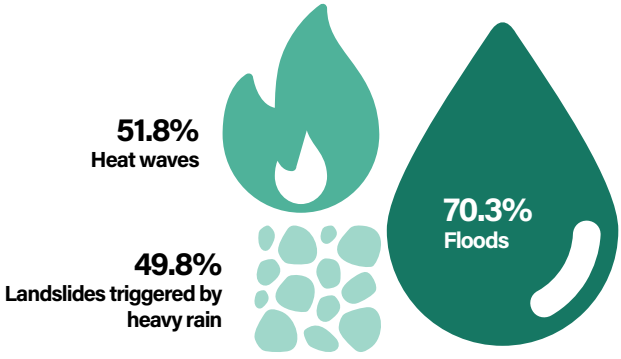
- My government considers climate change an urgent national priority and allocates sufficient resources to address this threat
- My government is aware of the threats but does not allocate sufficient resources to address them
- My government is not giving enough attention to climate change
- My government does not consider climate change as a threat
- I don't know my government's view on climate change



Respondents who say their government considers climate change an urgent national priority

02 TOP THREE MOST SERIOUS CLIMATE IMPACTS

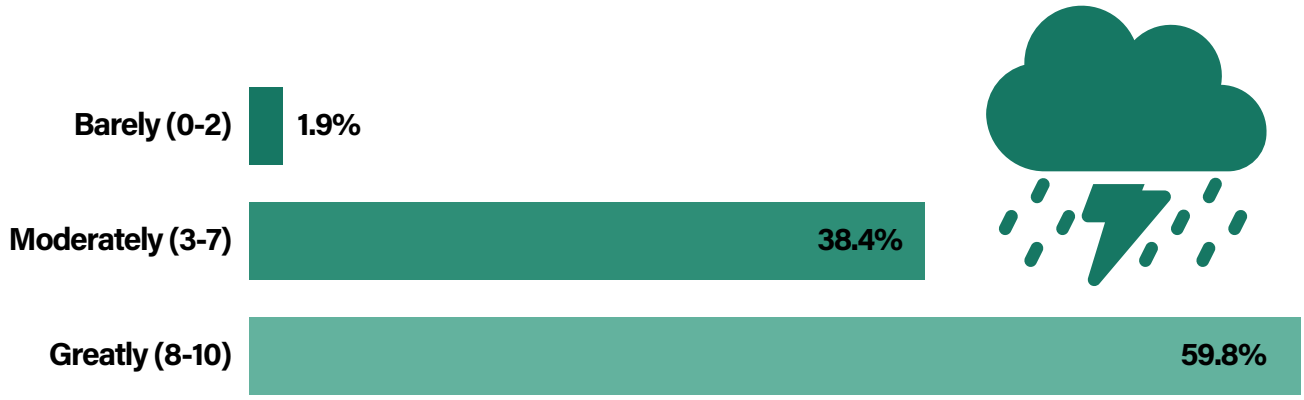
Floods (70.3%), heat waves (51.8%), and landslides triggered by heavy rain (49.8%) are the three most serious climate change impacts according to Southeast Asians.



Percentage of respondents who ranked each impact among the top three

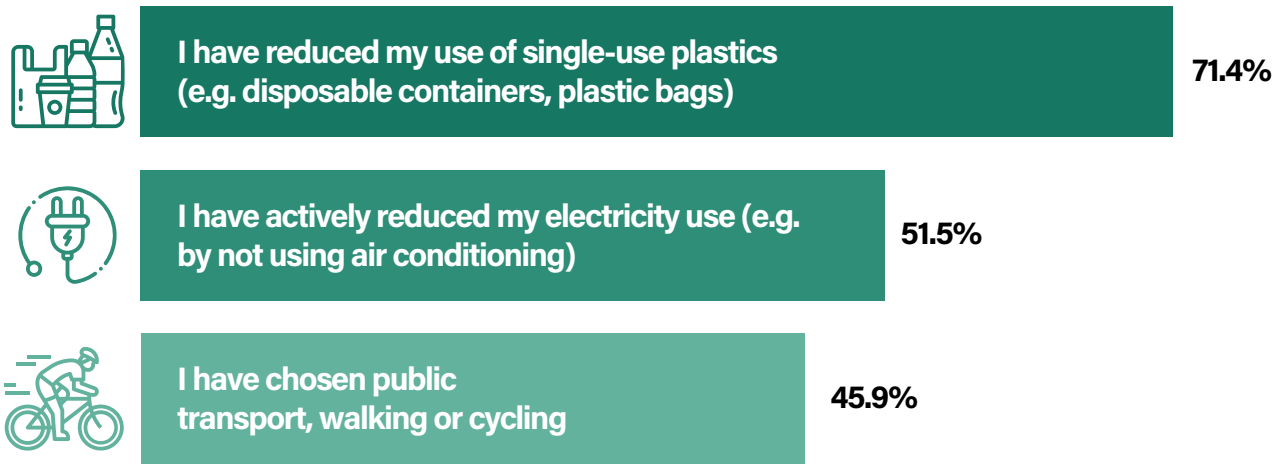
03 CLIMATE FUTURE UNDER CRISIS

On a scale of 0-10, almost 60.0% of Southeast Asians believe their lives will be greatly affected (8-10) by climate change in the next ten years.



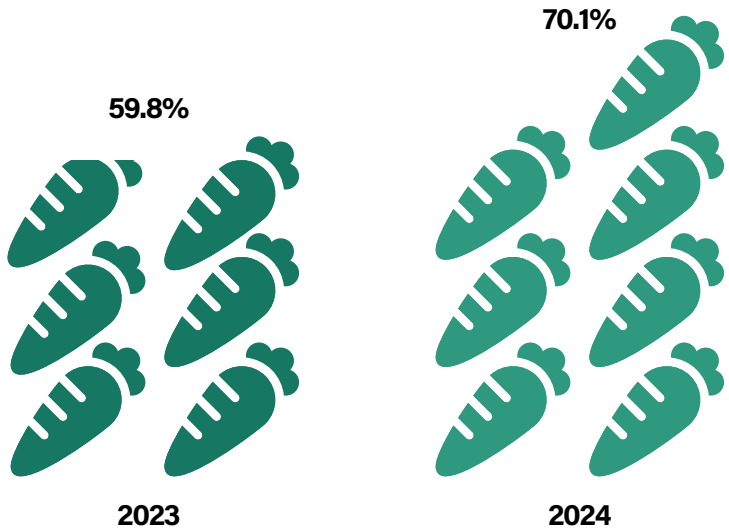
04 TAKING ACTION

Majority of Southeast Asians have made at least one lifestyle change for the climate in the past year. The top three actions are: reducing single-use plastics, saving electricity and choosing public transport, walking or cycling.



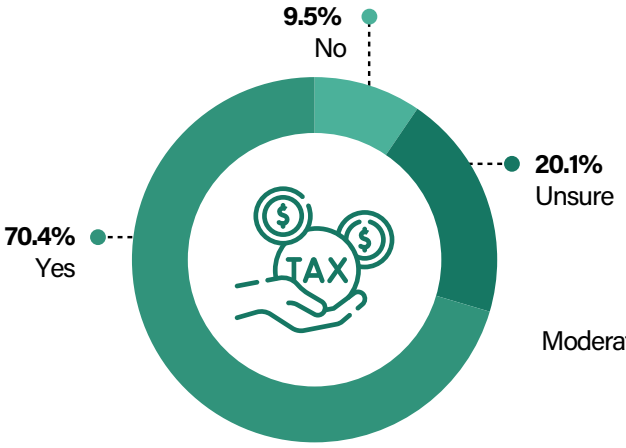
05 LOOMING FOOD INSECURITY

Compared to last year (59.8%), 70.1% of respondents now feel that they experience food insecurity sometimes, frequently or all the time.

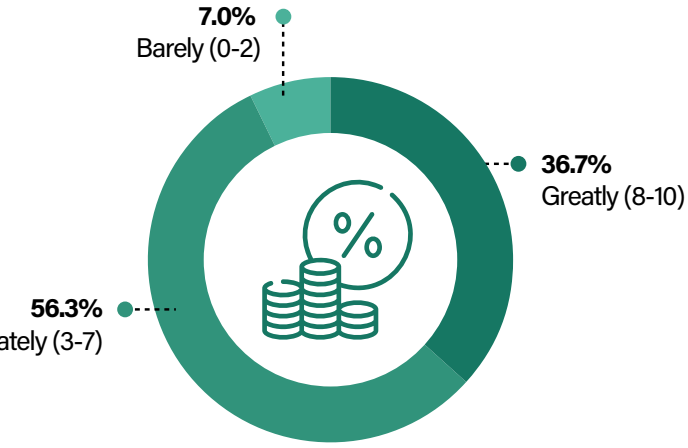


06 ARE WE READY FOR A CARBON TAX?

Of the 70.4% who support a national carbon tax, 93.0% are greatly or moderately willing to shoulder personal costs arising from the tax burden.



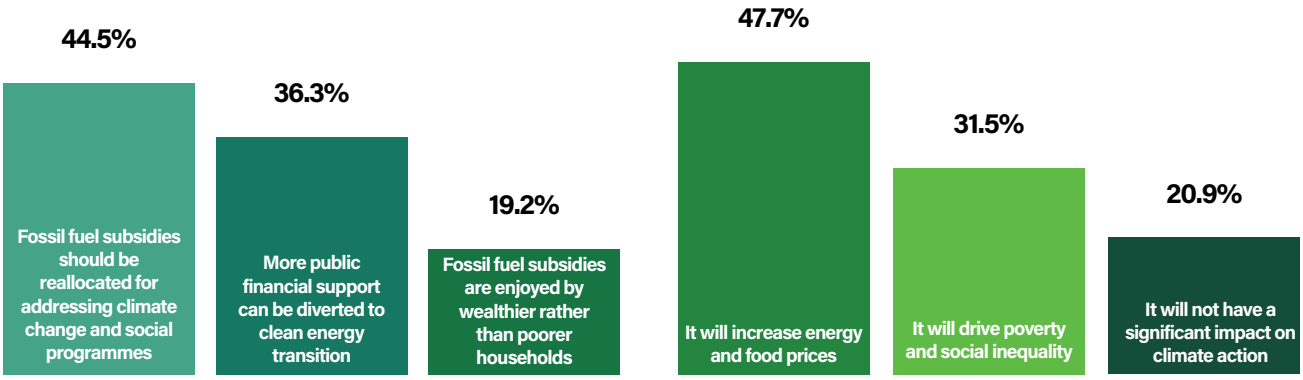
Support for a carbon tax



Willingness to pay for a carbon tax on a scale of 0-10

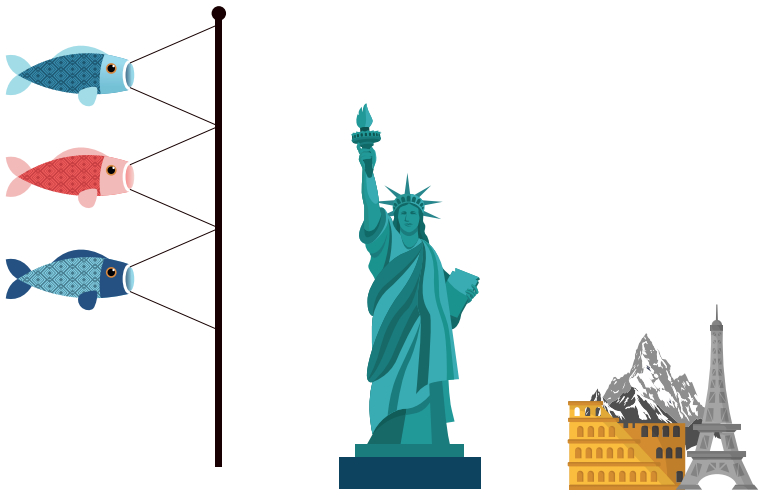
07 VIEW OF FOSSIL FUEL SUBSIDIES

Those in favour of cutting fossil fuel subsidies largely want it to be replaced by support for climate and social support, while opponents fear the impact on their cost of living.



08 LEADERS IN CLIMATE INNOVATION

Japan, the United States and the European Union are considered by Southeast Asians to be the top three leaders in global climate innovation.



JAPAN **28.5%**

US **18.3%**

EU **16.3%**

SECTION I

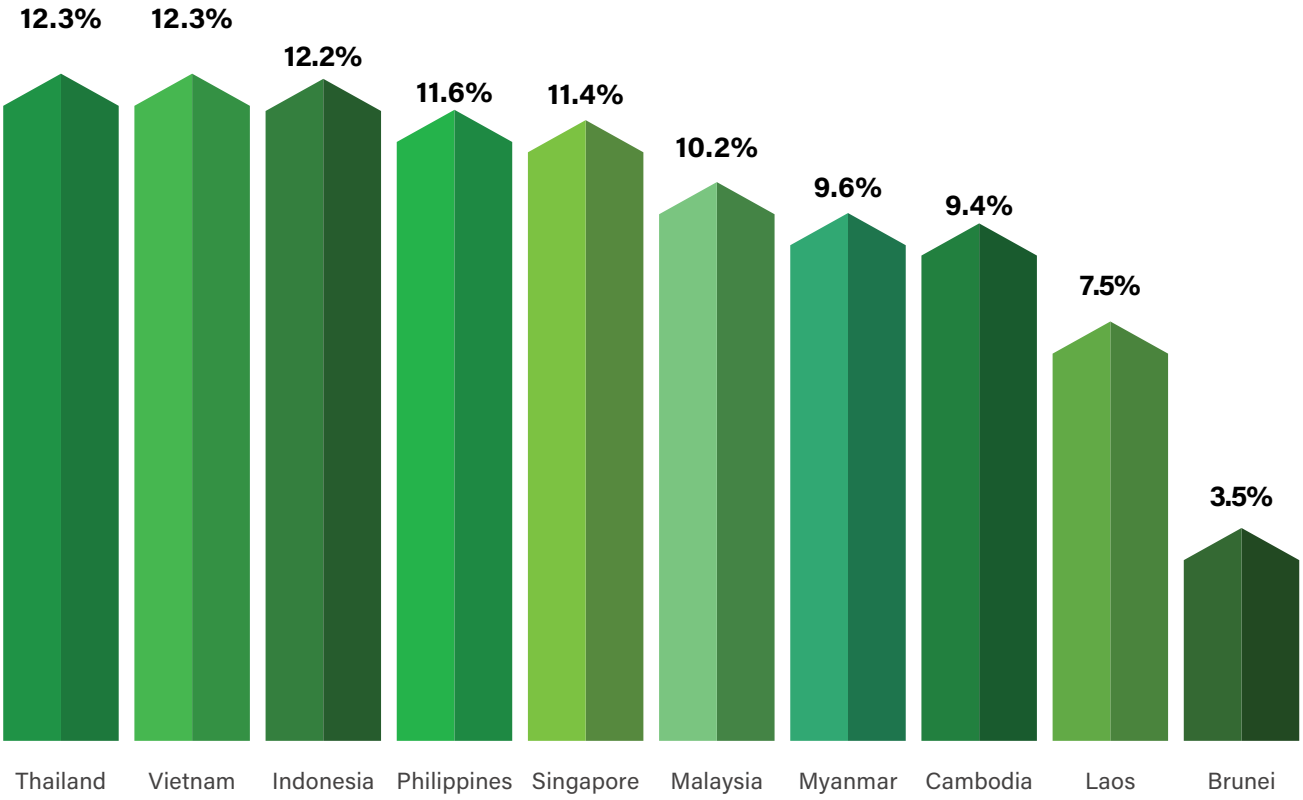
RESPONDENTS' PROFILE

Pages

09-12

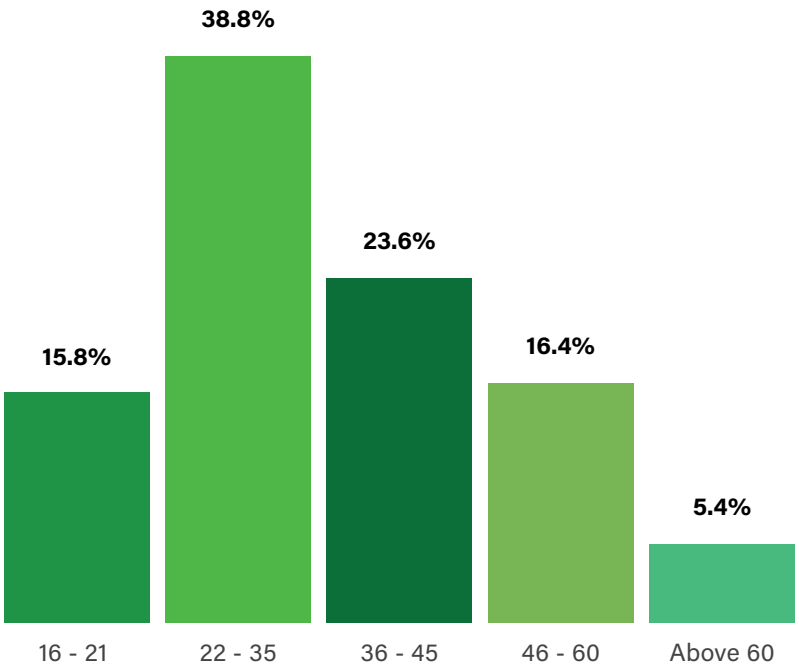
01 Nationality

A total of 2,931 respondents from ten ASEAN countries responded to the survey. This was an increase from 2,225 respondents last year. Thailand and Vietnam had the greatest proportion of respondents (12.3% each) followed by Indonesia (12.2%). In 2023, the highest number of respondents came from Singapore (12.5%), followed by Malaysia (11.6%) and Indonesia (11.5%).



02 Age

Similar to last year, respondents between 22 and 35 years old comprise the largest age group in this survey at 38.8%. This is followed by those aged 36-45 (23.6%) and 16-21 (15.8%). The smallest age group is those above 60 years old at 5.4%, a slight increase from the previous year.

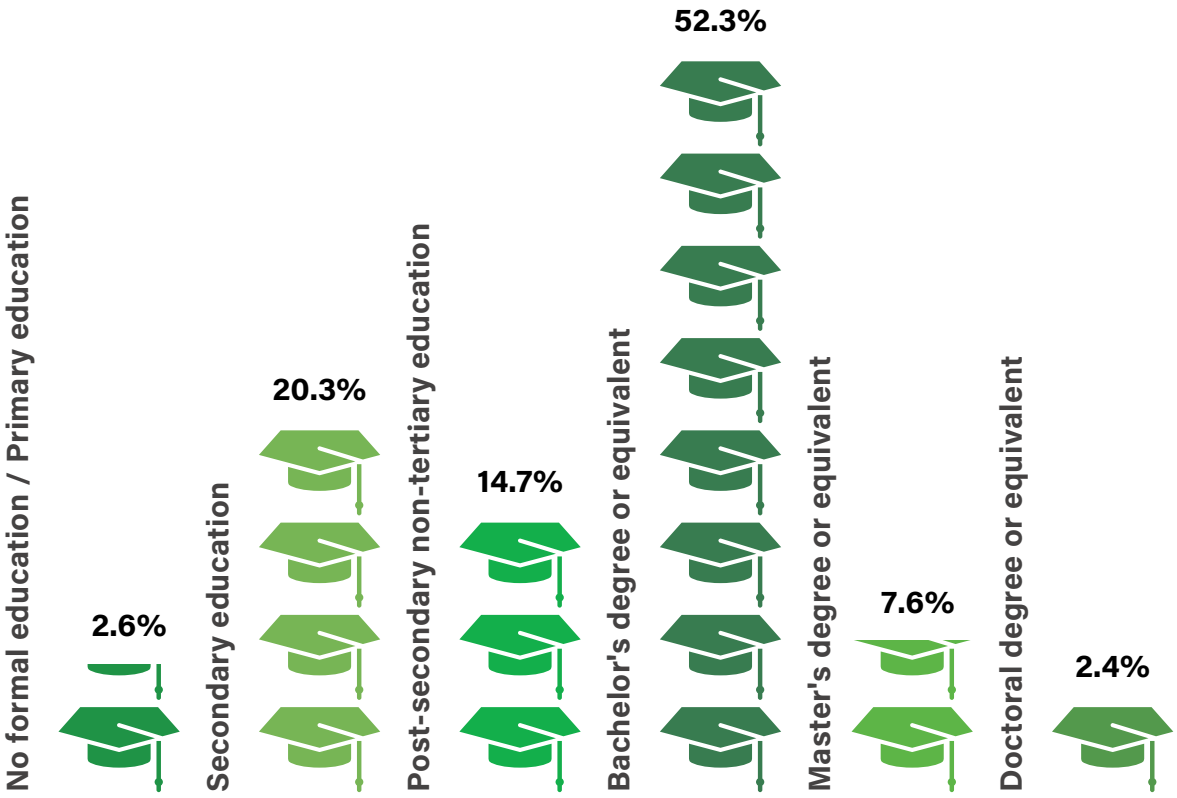


03 Gender

53.9% of respondents are male while 46.0% are female. 0.1% identified as "Other".

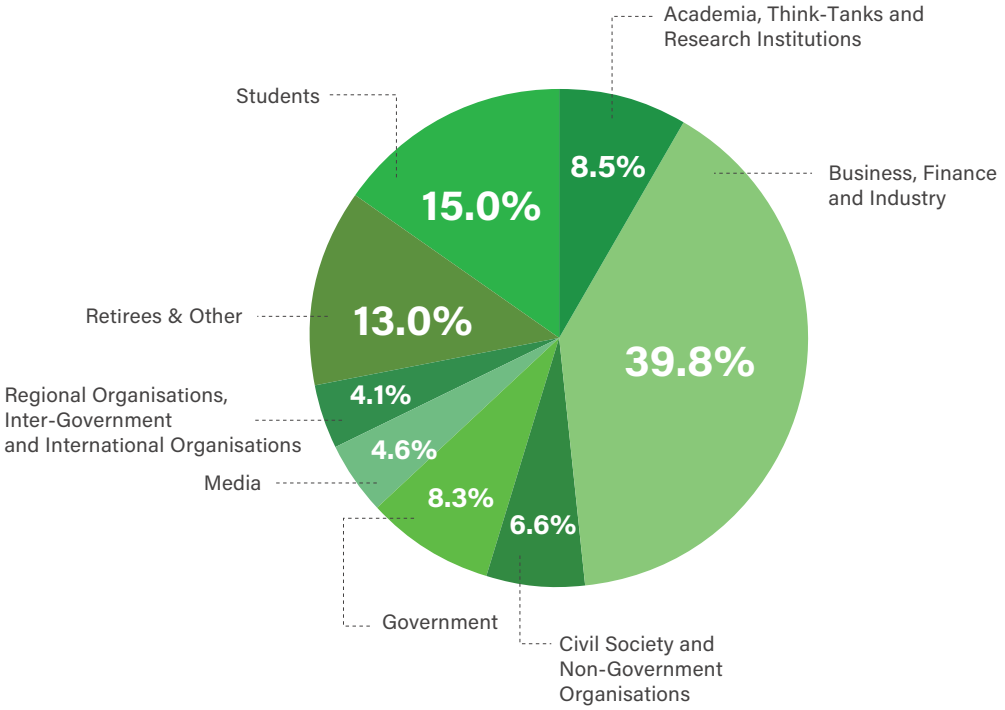
04 Education

Over half of the regional respondents hold a bachelor's degree or equivalent (52.3%), followed by 20.3% whose highest education attained is at the secondary level. The third largest group is those who obtained post-secondary education including vocational training, technical or trade training (14.7%). Respondents with a doctoral degree or equivalent make up the smallest group (2.4%).



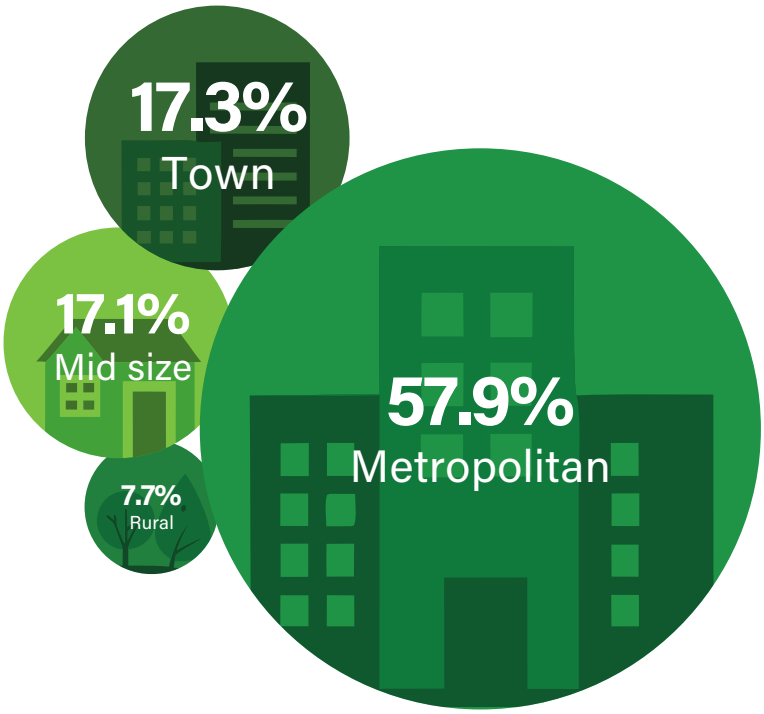
05 Affiliation

The largest affiliation group consists of respondents working in the private sector, including business, finance and other industries (39.8%). The second largest group was students (15.0%) followed by retirees & others (unemployed, freelancers or homemakers) at 13.0%. The smallest group consists of respondents working in regional, inter-government and international organisations (4.1%).



06 Type of City[4]

Of the 99.2% of respondents residing within the region, 57.9% live in metropolitan cities, especially Singapore, the Bangkok Metropolitan Region, Phnom Penh, Jakarta Metropolitan Area, Ho Chi Minh City and Hanoi. 34.4% live in mid-sized cities or towns such as Klang, Cebu City and Chiang Mai. The remaining 7.7% live in rural areas.

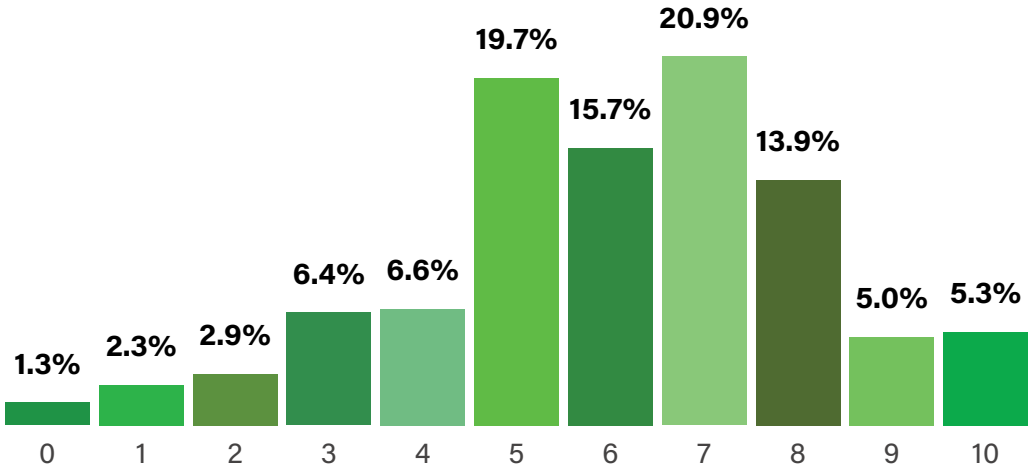


[4]The type of city is clustered by population size: metropolitan (>1 million), mid-sized (250,000-999,999), and towns (<250,000).

07 Socio-economic status versus reported household income

a. Socio-Economic Status

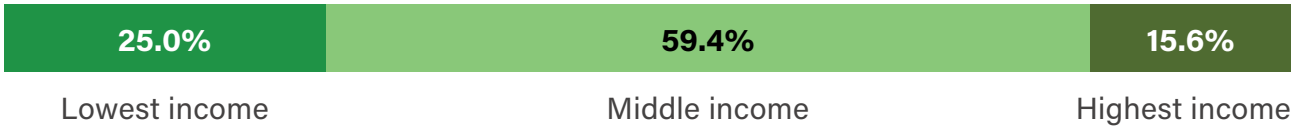
Respondents were asked to self-evaluate their social economic well-being on a scale of 0-10 where zero is the lowest and ten is the highest. Majority of Southeast Asians (56.3%) rate themselves between five to seven. 19.5% of the respondents rate their socio-economic well-being at four and below, whereas 24.2% feel they are at the upper end of the scale.



b. Household Income

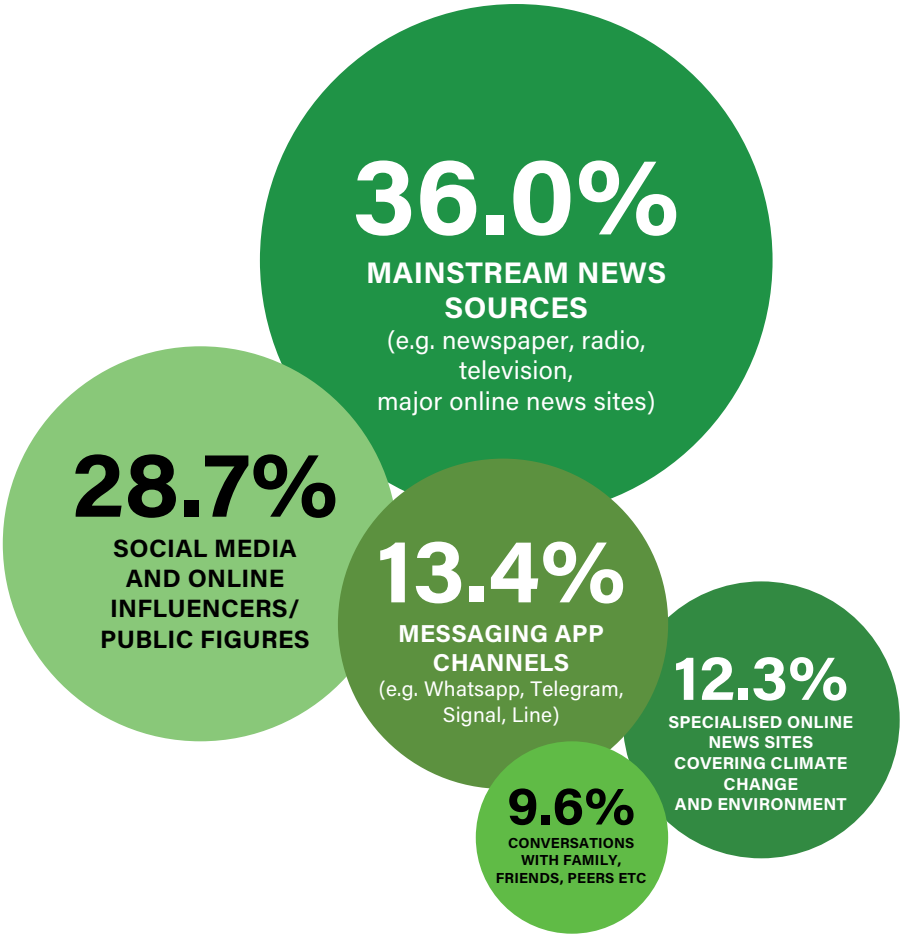
In this year's survey, respondents were asked to report their combined household income levels. The income distribution in each ASEAN country was divided into five equal-sized groups. Quintile 1 represents those with the lowest household incomes, while Quintile 5 represents the highest. 54.2% of respondents placed themselves in Quintile 3 and higher, while 45.8% placed themselves in Quintiles 1 and 2.

To simplify the analysis in this report, Quintile 1 was grouped as lowest income, Quintiles 2, 3 and 4 as middle income, and Quintile 5 as highest income. To understand how the household income groups were derived for each ASEAN country, refer to Methodology notes.



08 Top source of climate change news

Mainstream news is still the most popular source of information about climate change (36.0%), followed by social media and online influencers or public figures (28.7%). This year, messaging app channels such as WhatsApp, Telegram, Signal, Line etc were the third most common source of information (13.4%), overtaking conversations with family, friends and peers (9.6%) which was ranked third last year.



SECTION II

REALITIES VS. EXPECTATIONS IN SOUTHEAST ASIA'S CLIMATE FUTURE

Pages

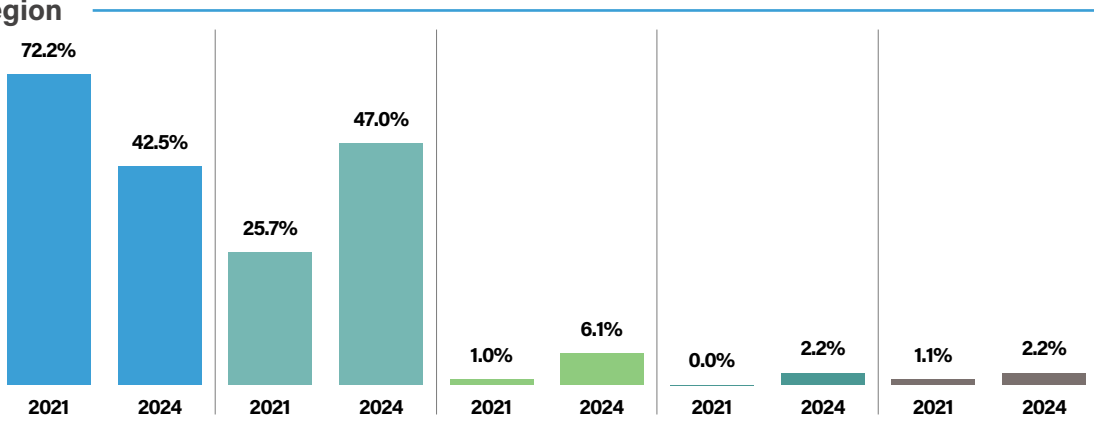
14-27

09 What is your view of climate change?

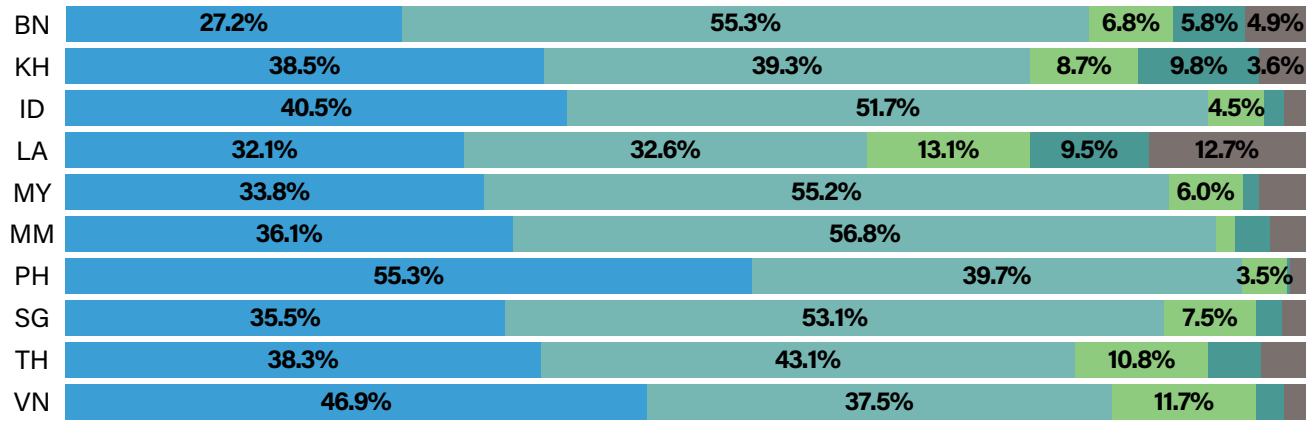
The majority of Southeast Asians either view climate change as an important issue that deserves monitoring or as a serious and immediate threat to their countries' well-being. Although concerns about climate change remains high, the proportion of those who see it as a serious and immediate threat dropped significantly from 72.2% in 2021 to 42.5% this year. Conversely, the number of people who consider it an important issue that requires monitoring, as well as those who deny climate change, increased notably this year. This shift may be attributed to the region's worries about geopolitics and economic pressures, such as the ongoing war in Ukraine, conflict in the Gaza, sustained inflation, and rising food and energy prices, which have overshadowed environmental and climate issues.

Among those concerned about climate change as an immediate threat, respondents from the Philippines (55.3%) show the greatest concern, more so than those from other countries. Vietnam respondents (46.9%) also express higher levels of concern compared to the regional average of 42.5%. Notably, those who continue to see climate change as an immediate threat are more likely to hold a bachelor's degree or higher, suggesting that concern over climate change increases with education level.

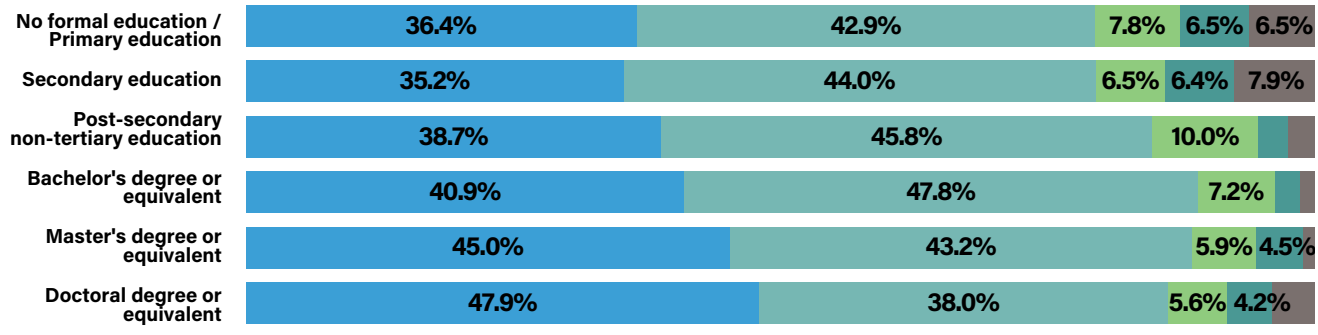
Region



Nationality



Education



- 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 threat and will not impact me in my lifetime
- It is not a threat to me or my country
- There is no scientific basis for climate change

10 In your view, what are the most serious climate change impacts that your country is currently exposed to? Rank the choices from most to least serious.

Floods (70.3%), heat waves (51.8%), and landslides triggered by heavy rain (49.8%) are the top three most serious climate change impacts in the lived climate experiences of Southeast Asians. Landslides triggered by heavy rain replaced drought which was among top three concerns last year. Given the unique and diverse geographies of the tropics, it is not surprising that there are variations among regional respondents' experiences with extreme weather events.

For the Philippines, tropical storms (72.6%) and floods (72.1%) are the country's top concerns because the Philippines lies in the path of destructive tropical cyclones whereas Singapore, a low-lying island at the equator is more concerned about heat waves (82.1%) and sea level rise (71.6%). Similarly, for Thailand, drought (72.5%) and heat waves (70.3%) are top concerns as many countries across the region experienced an unusually long dry El Niño season, a natural climate pattern that originates in the Pacific Ocean along the equator and influences weather across the region.

Majority of respondents, regardless of the size of their city of residence, are generally more concerned about floods than the other potential impacts whereas those living in towns and rural areas are more concerned about droughts. Correspondingly, respondents living in metropolitan cities are more concerned about sea-level rise (40.9%) than respondents from other city types.

Nationality

	Floods	Heat waves	Landslides triggered by heavy rain	Tropical storms	Droughts	Sea level rise
Region	**70.3%**	**51.8%**	**49.8%**	**49.2%**	**46.1%**	**32.7%**
BN	67.0%	68.9%	41.7%	38.8%	52.4%	31.1%
KH	74.5%	58.9%	40.4%	38.9%	53.8%	33.5%
ID	70.1%	40.5%	52.8%	52.8%	48.9%	34.9%
LA	59.3%	62.9%	47.1%	45.7%	62.0%	23.1%
MY	79.3%	69.6%	57.5%	30.4%	33.1%	30.1%
MM	76.8%	59.6%	58.9%	35.7%	30.0%	38.9%
PH	72.1%	50.0%	49.4%	72.6%	32.1%	23.8%
SG	63.9%	82.1%	23.6%	24.5%	34.3%	71.6%
TH	57.8%	70.3%	28.9%	37.8%	72.5%	32.8%
VN	74.2%	54.7%	54.2%	41.9%	44.2%	30.8%

Percentage of respondents who ranked each impact among the top three

City Type

	Floods	Heat waves	Landslides triggered by heavy rain	Tropical storms	Droughts	Sea level rise
Metropolitan	69.4%	62.4%	44.8%	39.1%	43.5%	40.9%
Mid size	73.4%	53.7%	50.3%	51.7%	41.9%	29.0%
Town	69.4%	63.5%	41.7%	42.7%	53.6%	29.2%
Rural	63.8%	59.4%	47.3%	47.8%	53.1%	28.6%

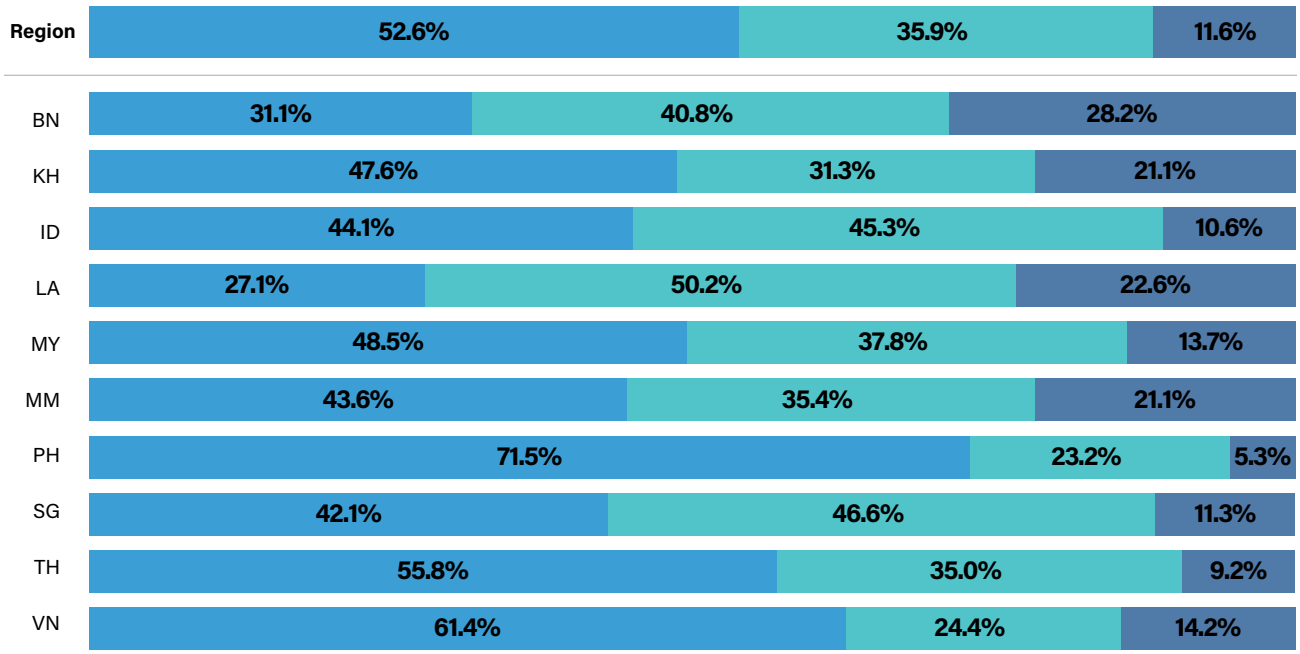
Percentage of respondents who ranked each impact among the top three

11 To what extent do you think climate change impacts will negatively affect your health?

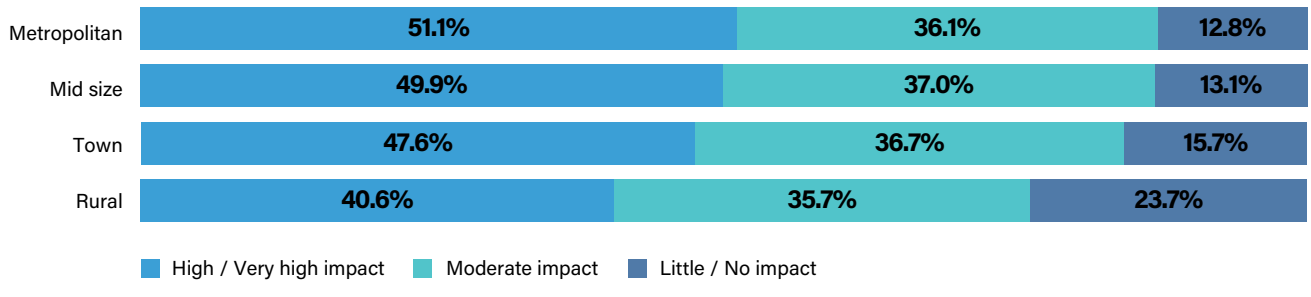
Majority of regional respondents (52.6%) believe that climate change impacts will negatively affect their health. Respondents from the Philippines (71.5%), Vietnam (61.4%), and Thailand (55.8%) show the greatest concern. In contrast, among those who do not think that climate change will negatively affect their health, respondents from Brunei (28.2%) and Laos (22.6%) are more likely to hold this view.

Interestingly, those concerned about the impact of climate change on health are more likely to live in large cities than in rural areas. 51.1% of regional respondents living in metropolitan cities say they expect high or very high health impacts whereas 40.6% of those living in rural areas say the same. This is particularly true as urban areas face significant challenges in addressing the health consequences of climate change. Cities experience higher extreme temperatures due to the urban heat island effect and have less green space to mitigate the impact of heat waves.[5] Additionally, the issue of climate change in urban areas is exacerbated by man-made challenges such as air pollution and overcrowding, which further complicate responses to climate change and public health.

Nationality



City Type



[5]Fagliano and Diez Roux, "Climate Change, Urban Health, and the Promotion of Health Equity."

12 In your opinion, who are the top three groups responsible for tackling climate change in your country? (Select 3 choices)

National governments continue to be viewed as bearing greatest responsibility for tackling climate change by a large majority of respondents (79.7%), followed by business and industries (55.9%). The role of subnational governments (52.7%) outstripped individual responsibility (46.6%) this year - a deviation from the last three years. Subnational governments play a critical role in multilevel governance and especially in delivering essential services to populations. Across the region, the role of the subnational government (47.1% to 52.7%) and individual (44.4% to 46.6%) increased while multilateral organisations (36.2%) and civil society organisations (28.9%) ranked lower.

Slight variations in the assignment of responsibility can be observed in different countries. For instance, the subnational governments in Brunei (59.2%) and Laos (73.3%) are assigned greater responsibility than the national governments whereas Thailand respondents expect the private sector (75.0%) to take greater responsibility than its national government (64.2%).

Five ASEAN countries—Cambodia, Indonesia, Myanmar, the Philippines, and Singapore—continue to place individual responsibility within the top three groups. For the Philippines in particular, individual responsibility (50.3%) is ranked in second place. Youth respondents between 16-21 years of age have a tendency to view individual responsibility more positively (53.9%) as compared to those above 60 years of age (34.8%).

Nationality

	National government	Businesses and industries	Subnational governments	Individuals	Multilateral organisations	Civil society organisations
Region	**79.7%**	**55.9%**	**52.7%**	**46.6%**	**36.2%**	**28.9%**
BN	**56.3%**	**41.7%**	**59.2%**	**43.7%**	**53.4%**	**45.6%**
KH	**72.7%**	**42.2%**	**56.7%**	**47.3%**	**44.0%**	**37.1%**
ID	**83.2%**	**64.0%**	**48.6%**	**50.3%**	**30.4%**	**23.5%**
LA	**63.8%**	**46.2%**	**73.3%**	**32.1%**	**41.2%**	**43.4%**
MY	**80.3%**	**42.1%**	**57.2%**	**37.5%**	**42.5%**	**40.5%**
MM	**68.2%**	**29.3%**	**61.1%**	**51.8%**	**44.6%**	**45.0%**
PH	**85.0%**	**42.6%**	**47.6%**	**50.3%**	**41.2%**	**33.2%**
SG	**84.5%**	**67.8%**	**34.0%**	**49.0%**	**41.5%**	**23.3%**
TH	**64.2%**	**75.0%**	**67.2%**	**37.2%**	**29.4%**	**26.9%**
VN	**85.0%**	**53.9%**	**49.7%**	**40.6%**	**44.7%**	**26.1%**

Age

	National government	Businesses and industries	Subnational governments	Individuals	Multilateral organisations	Civil society organisations
16-21	**69.2%**	**38.8%**	**52.8%**	**53.9%**	**42.2%**	**43.1%**
22-35	**74.6%**	**47.6%**	**55.9%**	**43.1%**	**43.3%**	**35.5%**
36-45	**77.7%**	**57.4%**	**56.6%**	**44.1%**	**38.7%**	**25.4%**
46-60	**81.7%**	**65.5%**	**50.5%**	**41.2%**	**33.7%**	**27.4%**
Above 60	**87.3%**	**63.9%**	**48.7%**	**34.8%**	**35.4%**	**29.7%**

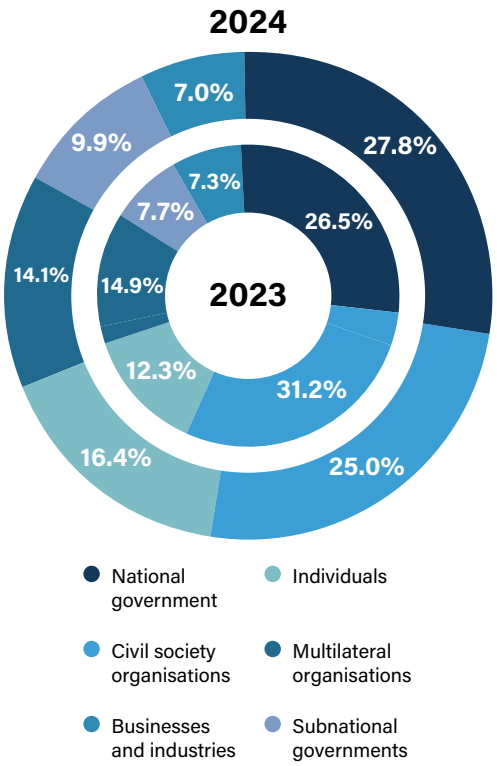
13 In your opinion, who has been the most active in tackling climate change in your country?

In line with their view that national governments should bear the greatest responsibility to tackle climate change, 27.8% of regional respondents see their national governments being the most active in addressing the problem. This is a departure from 2023 where civil society organisations were held in higher regard than national governments. At the country level, Singapore respondents hold their national government in the highest regard (63.0%) followed by Vietnam (35.6%) and Cambodia (31.3%).

Although civil society organisations were overtaken by national governments this year, they continue to be held in high regard by a quarter of regional respondents. Civil society climate action is particularly important for Myanmar (43.9%), Indonesia (29.9%) and Malaysia (25.8%).

Perhaps most worrying is that regional respondents continue to rank businesses and industries dead last (7.0%), even though it is deemed that private sector responsibility should follow national government responsibility (see question 12). This is a clear signal to businesses and industries to strive to do better in climate action.

Region



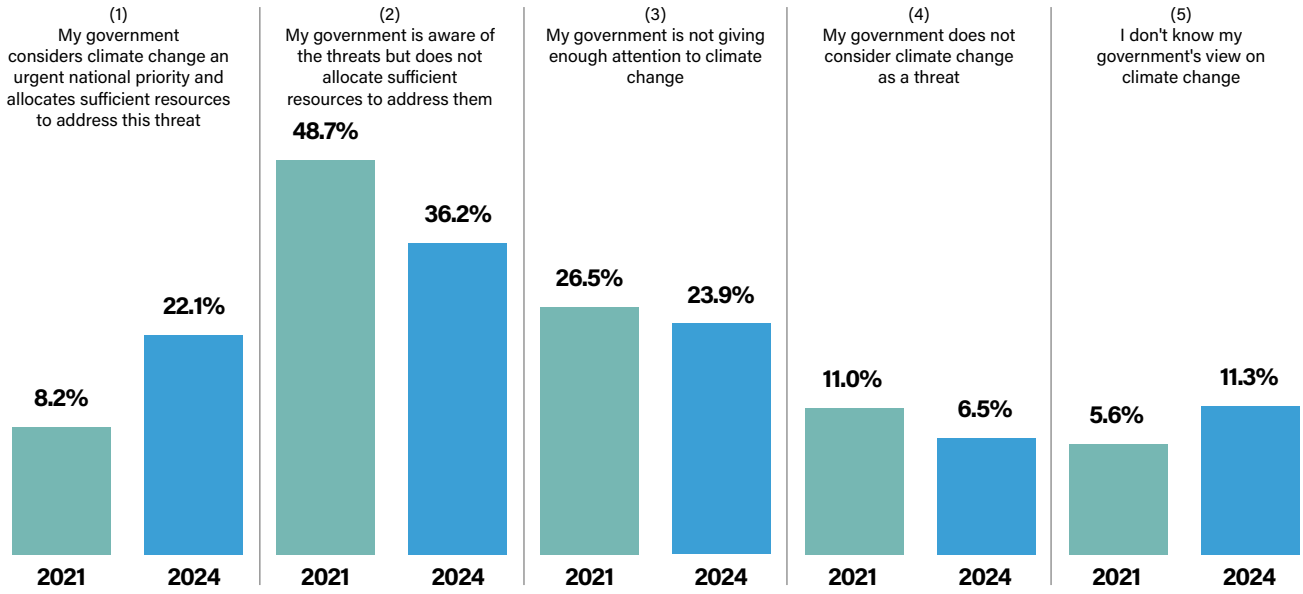
Nationality

	National government	Civil society organisations	Multilateral organisations	Individuals	Subnational governments	Businesses and industries
BN	29.1%	19.4%	18.4%	14.6%	9.7%	8.7%
KH	31.3%	8.7%	14.2%	19.6%	15.6%	10.5%
ID	29.1%	29.9%	11.7%	18.7%	5.6%	5.0%
LA	22.2%	11.3%	13.6%	19.9%	24.9%	8.1%
MY	26.8%	25.8%	14.7%	13.0%	10.0%	9.7%
MM	18.2%	43.9%	15.0%	11.4%	9.6%	1.8%
PH	23.5%	24.7%	20.3%	15.9%	10.3%	5.3%
SG	63.0%	10.1%	7.5%	9.6%	5.1%	4.8%
TH	22.5%	13.6%	9.4%	21.4%	17.2%	15.8%
VN	35.6%	16.7%	17.2%	9.2%	13.3%	8.1%

14 How would you rate your national government's policies and actions taken in support of climate change?

Similar to 2023, the largest proportion of regional respondents (36.2%) continues to see their government recognising climate threats but failing to allocate sufficient resources to address them. However, what is encouraging is that the percentage of respondents who say their government has tagged climate change as an urgent national priority and allocated sufficient resources to tackle the problem has had a nearly three-fold increase from 8.2% in 2023 to 22.1% whereas those who say that their government is not paying enough attention to climate change has dropped, albeit slightly, from 26.5% to 23.9% regionally. Among the former group, Singapore respondents continue to be most approving of their government's policies and actions at 50.1%, followed by Vietnam respondents (36.7%). Philippines respondents continue to be most disapproving of their government's actions with 43.5% who say their government is aware but has not allocated resources and another 24.1% who say their government is not giving enough attention to climate change.

Region



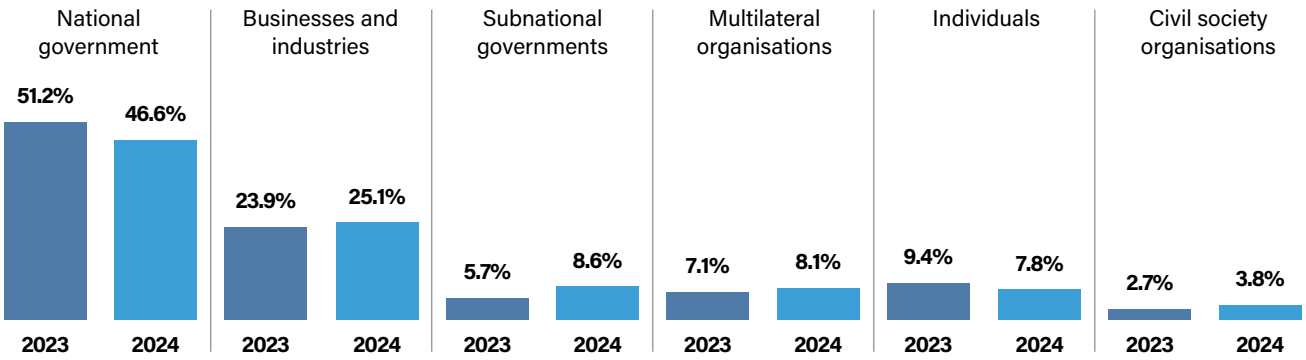
Nationality

	(1)	(2)	(3)	(4)	(5)
BN	29.1%	22.3%	6.8%	12.6%	29.1%
KH	19.3%	22.9%	25.8%	13.1%	18.9%
ID	19.8%	38.8%	25.7%	6.1%	9.5%
LA	10.0%	15.4%	36.2%	14.0%	24.4%
MY	21.1%	38.1%	21.7%	6.0%	13.0%
MM	9.6%	15.0%	30.4%	14.6%	30.4%
PH	23.8%	43.5%	24.1%	2.4%	6.2%
SG	50.1%	29.3%	7.5%	3.0%	10.1%
TH	17.8%	31.7%	31.4%	8.3%	10.8%
VN	36.7%	39.4%	10.0%	5.6%	8.3%

15 In your opinion, who should pay the greatest costs of climate change measures in your country?

Although the proportion of regional respondents who say that national governments should pay for the costs of climate measures has fallen from 51.2% in 2023 to 46.6% this year, this group still holds the dominant regional view. This is followed by businesses and industries at 25.1% with a slight increase from 23.9% last year. The burden of bearing costs is lowest for civil society organisations (CSOs) at 3.8% as the CSOs are delivering a form of public good through advocacy and other actions. Across the region, the lowest income groups have a greater tendency to insist that national governments bear the cost (45.4%), but interestingly, this group is also open for subnational governments and individuals to bear some cost. When compared across income groups, the lowest income group is also the most open to absorbing costs at 12.4% versus the highest income group at 9.0%. The highest income group would like to see businesses and industries bear almost as much of the costs of mitigation and adaptation as the national government at 32.3% as opposed to the lowest income group (13.7%).

Region



Nationality

	National government	Businesses and industries	Subnational governments	Multilateral organisations	Individuals	Civil society organisations
BN	42.7%	12.6%	18.4%	11.7%	9.7%	4.9%
KH	36.0%	17.5%	14.5%	10.9%	14.9%	6.2%
ID	52.0%	29.3%	7.0%	7.3%	2.5%	2.0%
LA	33.0%	9.5%	20.8%	8.1%	19.9%	8.6%
MY	42.5%	23.7%	9.7%	12.0%	7.0%	5.0%
MM	52.5%	6.1%	11.4%	10.0%	11.8%	8.2%
PH	35.9%	31.2%	4.4%	7.1%	17.6%	3.8%
SG	46.6%	28.1%	5.4%	7.5%	10.1%	2.4%
TH	41.7%	22.2%	13.3%	5.3%	10.6%	6.9%
VN	47.8%	23.3%	9.2%	11.1%	5.6%	3.1%

Income group

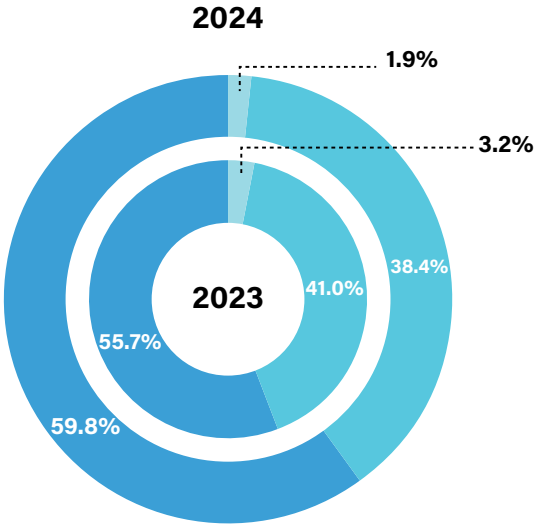
	National government	Businesses and industries	Subnational governments	Multilateral organisations	Individuals	Civil society organisations
Highest income	37.3%	32.3%	7.6%	11.1%	9.0%	2.6%
Middle income	44.4%	22.5%	10.3%	7.8%	10.2%	4.9%
Lowest income	45.4%	13.7%	12.4%	9.8%	12.4%	6.3%

16 On a scale of 0-10, to what extent do you think climate change impacts will negatively affect your life in 10 years' time (2034)?

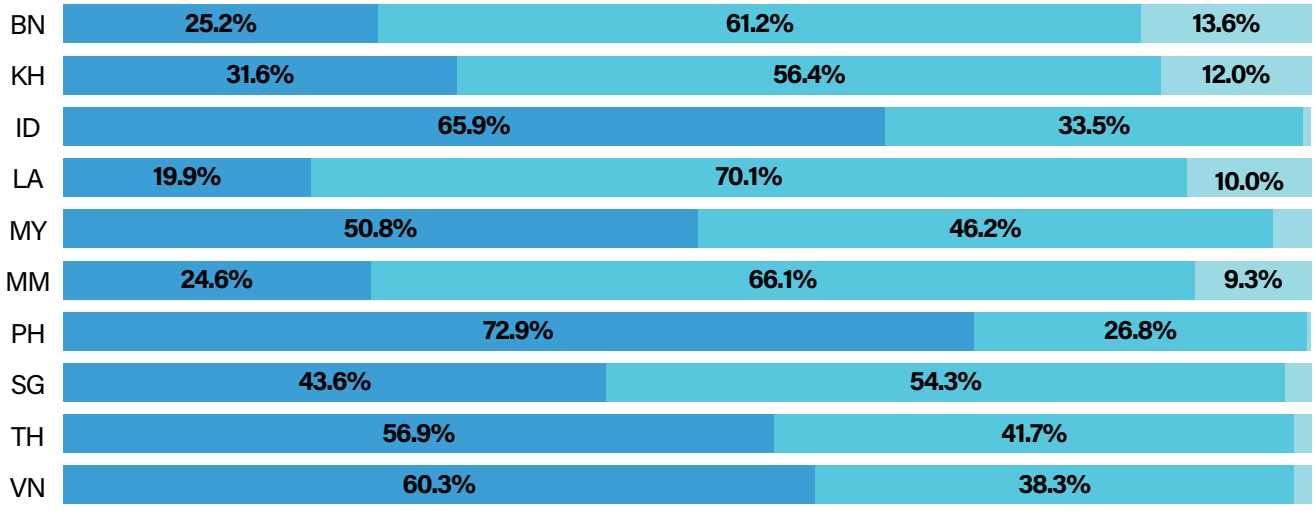
59.8% of Southeast Asians say with great confidence that extreme weather events and climate impacts will affect them personally in ten years' time. This perception saw an increase from 55.7% in 2023. Across the region, respondents from the Philippines (72.9%) are more likely to experience impacts first-hand which corroborates with current lived experiences. Conversely, at the regional average, 1.9% believe that they are not likely to experience impacts in ten years with the largest proportion of them coming from Brunei (13.6%), Cambodia (12.0%), and Laos (10.0%).

Interestingly, those in the highest income bracket are more likely to say that climate change will negatively affect them within the next decade.

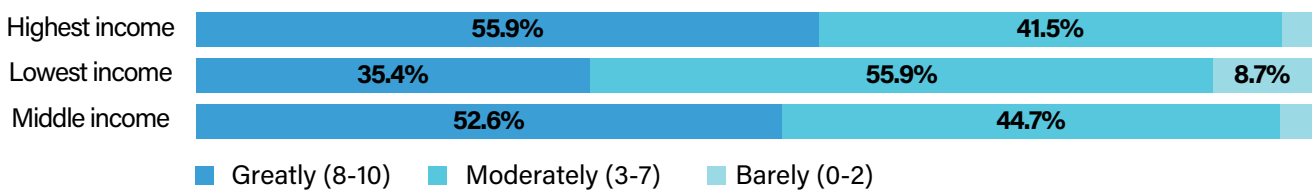
Region



Nationality



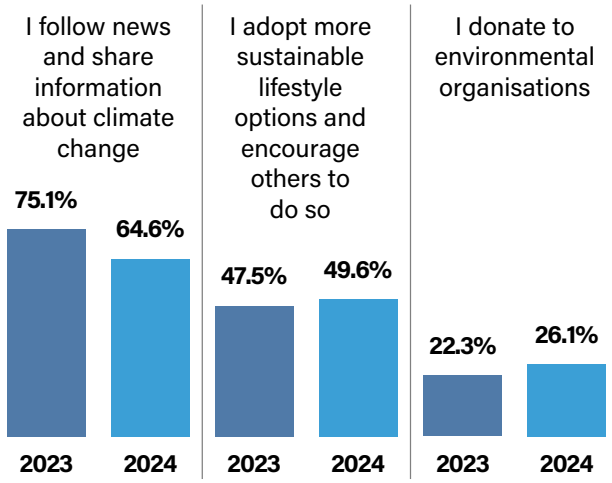
Income group



17 Which statement best describes your level of participation in climate advocacy? (Check all that apply)

Respondents were presented with statements to evaluate their participation in climate advocacy, ranging from passive and individualistic actions to more active and community-driven efforts. The majority of regional respondents are more inclined to passive and individualistic behaviours, such as following climate news and sharing information (64.6%), though this figure dropped from 75.1% last year. This is followed by adopting sustainable lifestyle choices and encouraging others to do the same (49.6%), which saw a slight increase from 47.5% last year. Laos has the highest proportion of respondents who neither participate in nor follow climate-related issues (23.5%).

Region (Top 3)



Interestingly, younger respondents, especially those 22- 35 years old tend to be more involved in active and community driven activities like contacting local representatives (9.4%), joining climate movement groups (25.1%), leading a project on climate awareness (13.6%), and attending protests (8.2%) compared to their older counterparts. Conversely, the youngest age group (16-21 years old) tend to be the most apathetic as 13.4% of them say they don't participate or follow any climate issues.

Nationality

	Passive/Individual				Active/Communal					
	(1) I follow news and share information about climate change	(2) I adopt more sustainable lifestyle options and encourage others to do so	(3) I donate to environmental organisations	(4) I sign petitions	(5) I join climate movement groups and attend seminars	(6) I lead a project and mobilise support on climate change awareness	(7) I contact my local political representatives	(8) I attend protests	(9) I don't participate in or follow climate change issues	(10) Others
Region	**64.6%**	**49.6%**	**26.1%**	**15.5%**	**18.8%**	**10.0%**	**6.3%**	**5.8%**	**6.5%**	**1.3%**
BN	44.7%	26.2%	17.5%	9.7%	10.7%	8.7%	1.9%	7.8%	19.4%	1.0%
KH	52.0%	31.6%	21.8%	14.9%	33.5%	20.7%	16.7%	13.8%	7.6%	0.0%
ID	73.7%	46.1%	26.0%	15.4%	15.1%	5.9%	2.8%	3.1%	6.7%	1.1%
LA	36.2%	27.6%	11.8%	6.8%	10.9%	6.3%	9.0%	2.3%	23.5%	0.0%
MY	56.9%	42.1%	23.4%	20.1%	20.4%	6.7%	6.7%	5.4%	11.0%	2.0%
MM	48.6%	45.0%	36.4%	20.4%	23.2%	19.3%	12.5%	9.6%	10.7%	1.1%
PH	67.1%	58.8%	19.1%	15.3%	22.6%	10.9%	5.3%	3.5%	3.2%	2.1%
SG	50.7%	49.3%	14.3%	8.7%	12.2%	9.3%	3.9%	3.0%	20.9%	2.1%
TH	64.4%	51.1%	27.2%	11.1%	15.8%	9.2%	8.1%	4.7%	6.4%	1.7%
VN	52.8%	57.5%	31.4%	16.9%	23.1%	15.3%	10.0%	13.3%	3.6%	1.4%

Age

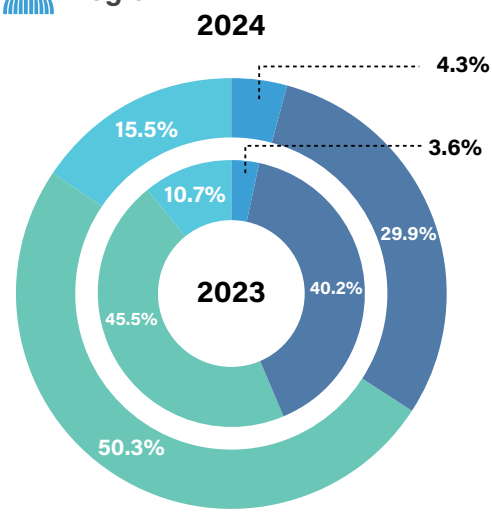
	(1)	(2)	(3)	(4)	(5)	(6)	(7)	(8)	(9)	(10)
16-21	43.5%	33.0%	19.0%	11.4%	15.3%	8.6%	6.3%	6.9%	13.4%	0.9%
22-35	55.4%	43.8%	25.5%	15.7%	25.1%	13.6%	9.4%	8.2%	10.2%	1.2%
36-45	60.8%	50.6%	28.9%	15.5%	18.4%	13.3%	9.0%	6.6%	7.8%	1.3%
46-60	63.4%	52.8%	18.3%	12.9%	12.7%	7.1%	5.4%	3.3%	10.8%	1.7%
Above 60	64.6%	59.5%	17.1%	12.7%	13.3%	6.3%	3.2%	3.2%	8.2%	2.5%

18 Which statement below best describes your experience with food insecurity?

Majority of Southeast Asians (50.3%) experienced some level of food insecurity, and this percentage was higher than last year's (45.5%). Similarly, those who say they frequently experience food insecurity increased from 10.7% last year to 15.5% this year. 4.3% of regional respondents say they face food insecurity all the time compared to 3.6% last year. Conversely, only 29.9% of respondents say they experience no food insecurity- compared to 40.2% last year.

Respondents from Myanmar (18.9%), Thailand (18.3%) and Malaysia (17.7%) are more likely to say they experience food insecurity frequently, above the regional average of 15.5%. According to the United Nations Food and Agriculture Organisation (FAO), 16.4% of Southeast Asians experience moderate or severe food insecurity. This could be attributed to food production and supply disruptions as a result of the 2023-2024 El Niño—one of the top 5 strongest El Ninos recorded causing widespread drought and heat waves, and resulting in yield reductions and crop failures globally.

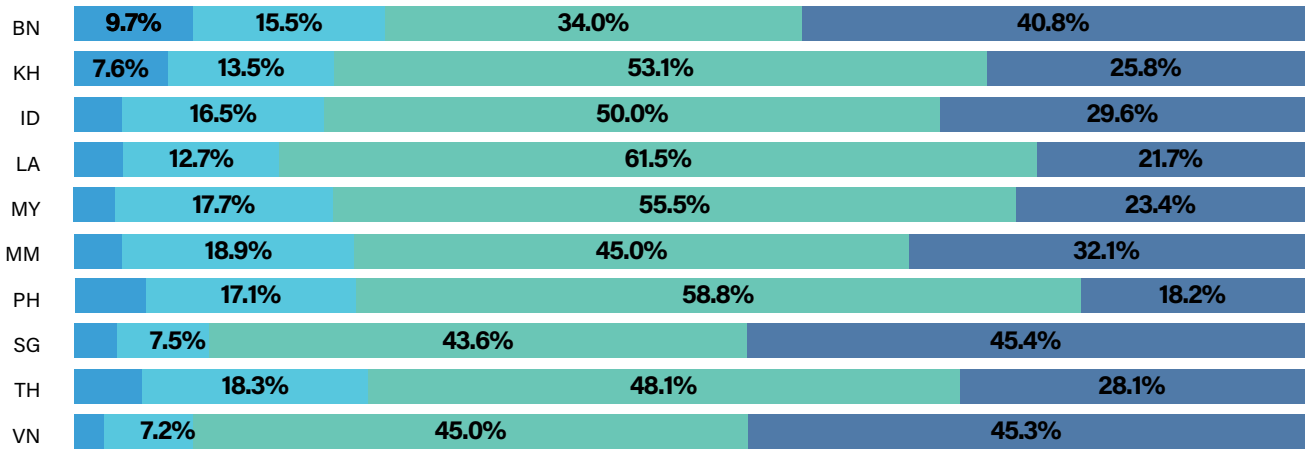
Region



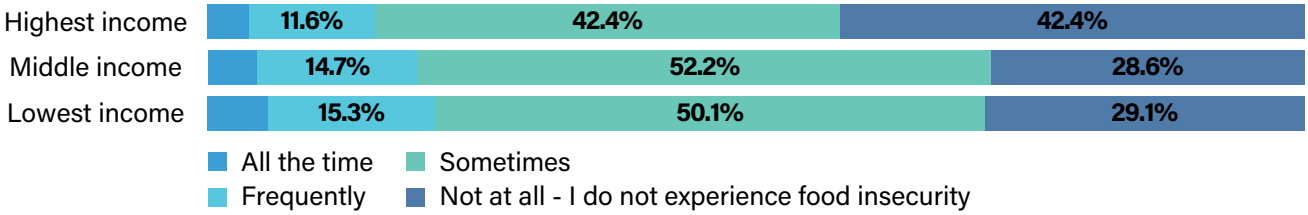
Seven in ten persons in the lower- and middle-income groups experience at least some form of food insecurity. One in ten persons in the highest income group also experience food insecurity either "frequently" or "all the time".

Across the region, Singapore (45.4%), Vietnam (45.3%) and Brunei (40.8%) are the most food secure countries, compared to the regional average of 29.9%.

Nationality



Income group

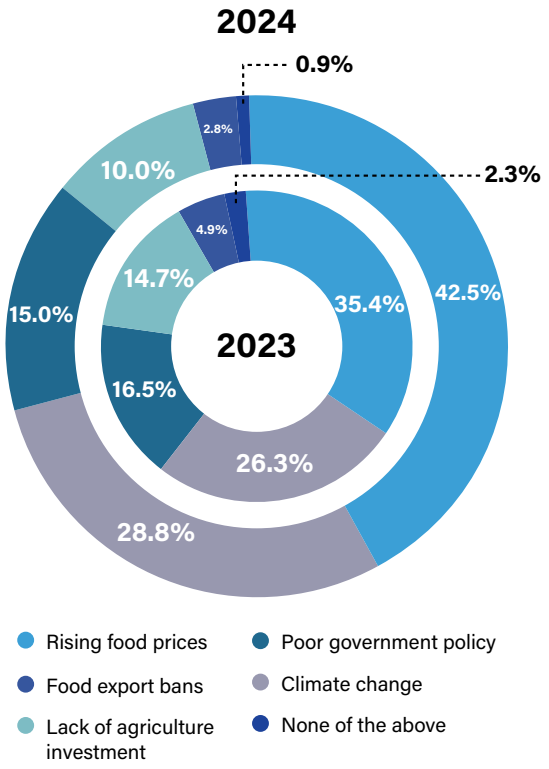


19 What do you think is the main cause of your food insecurity experience?

Rising food prices (42.5%) followed by climate change (28.8%) are seen to be the main causes of food insecurity. Attribution to both these causes is higher this year than last year. The perception of rising food prices aligns with World Bank findings, where food price inflation was consistently above 20% in Myanmar, Vietnam, and Laos and above 5% in Indonesia and the Philippines in the last 12 months.[6] Respondents also likely attributed the food insecurity to last year's El Niño, exacerbated by climate change. Rice yields declined due to droughts and sustained high temperatures. This also led to India banning non-basmati rice exports, which drove rice prices to 15-year highs at its peak.

Regionally, poor government policy is ranked among the top three reasons for food insecurity by 15.0% of respondents. Respondents in Myanmar (24.7%) Indonesia (20.6%), and Cambodia (19.1%) are more likely to blame poor government policy than on other causes. The Philippines (18.7%), Brunei (18.0%) and Cambodia (16.7%) attribute their food insecurity to lack of agricultural investment. Respondents from rural areas also tend to attribute food insecurity to lack of agricultural investment (14.5%) and poor government policies (13.8%) - these causes are ranked higher than climate change.

Region



Nationality

	(1) Rising food prices	(2) Climate change	(3) Poor government policy	(4) Lack of agriculture investment	(5) Food export bans	(6) None of the above
BN	37.7%	19.7%	11.5%	18.0%	4.9%	8.2%
KH	28.4%	19.6%	19.1%	16.7%	11.8%	4.4%
ID	33.7%	36.1%	20.6%	8.3%	0.8%	0.4%
LA	51.4%	12.1%	12.7%	8.7%	5.8%	9.2%
MY	46.3%	22.3%	12.2%	11.8%	5.2%	2.2%
MM	48.4%	19.5%	24.7%	1.6%	5.3%	0.5%
PH	54.0%	15.8%	9.7%	18.7%	1.1%	0.7%
SG	53.6%	26.2%	6.0%	6.0%	6.0%	2.2%
TH	51.7%	30.1%	6.2%	7.7%	3.1%	1.2%
VN	39.1%	36.0%	7.6%	8.6%	7.6%	1.0%

City Type

	(1)	(2)	(3)	(4)	(5)	(6)
Metropolitan	44.8%	27.1%	14.0%	8.1%	4.7%	1.3%
Mid size	46.5%	19.5%	12.8%	11.8%	4.5%	4.8%
Town	42.4%	25.2%	10.3%	14.3%	4.8%	2.9%
Rural	49.1%	13.2%	13.8%	14.5%	6.3%	3.1%

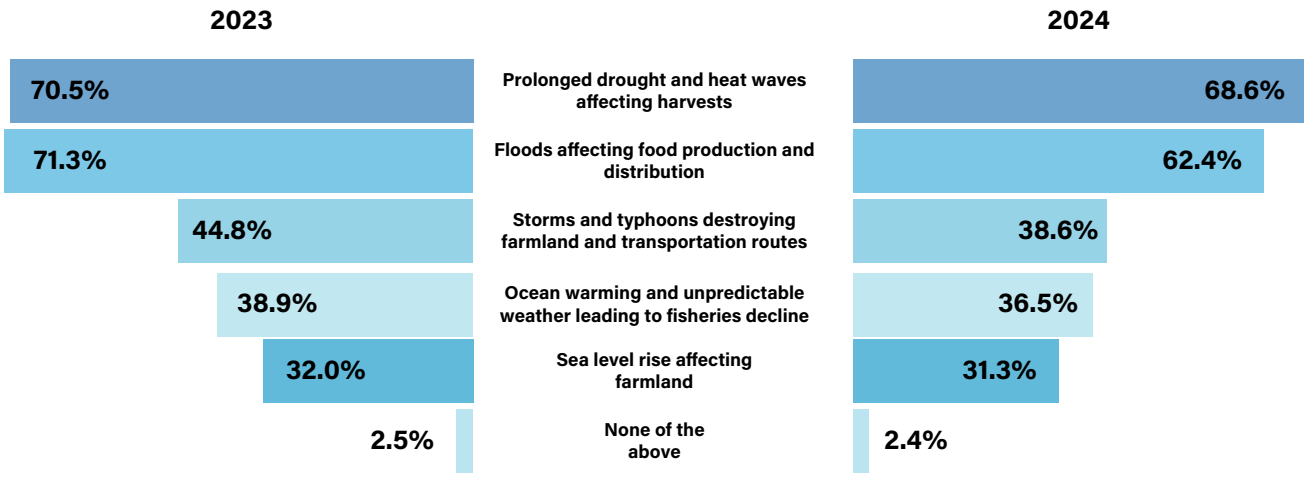
[6] World Bank, "Food Security Update," June 2024.

20 Which climate impacts are affecting your country's food availability? (Check all that apply)

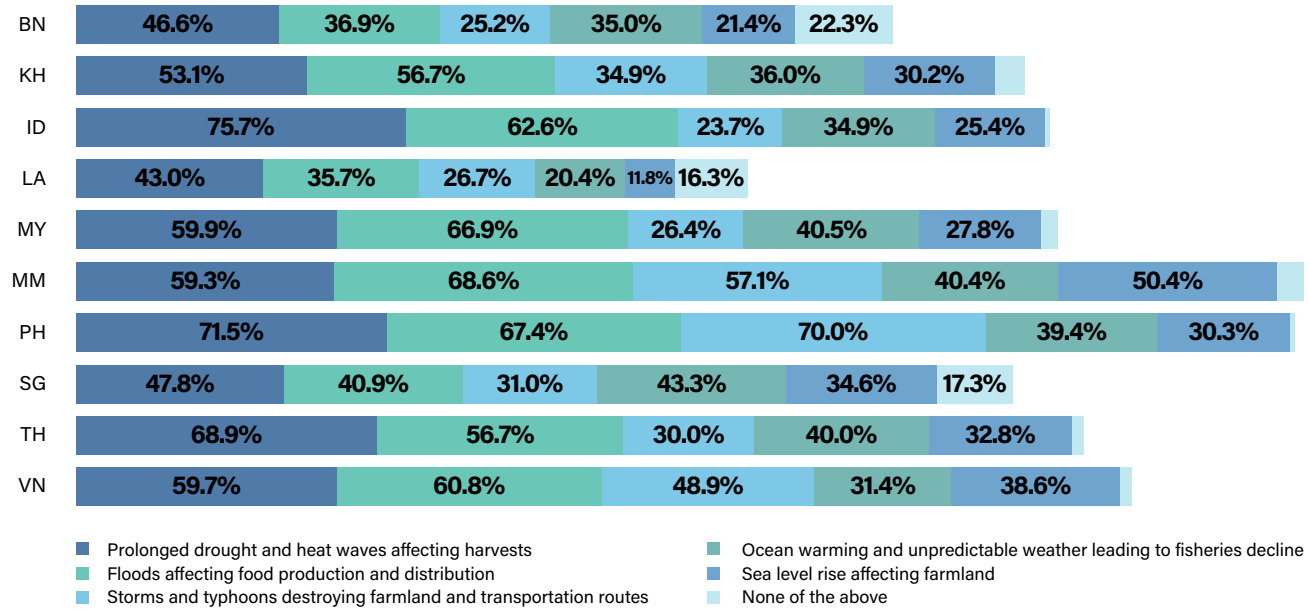
Approximately 2 in 3 Southeast Asians see prolonged drought and heat waves (68.6%) as the main climate impacts affecting their country's food availability, followed by floods (62.4%). This is a switch in order from last year where floods were deemed as the most serious impact on food availability but is aligned with the El Niño phenomenon in 2023-2024.

Respondents from the Philippines selected the most climate impacts, with drought and heat waves (71.5%), storms and typhoons (70.0%) and floods (67.4%) as the leading causes. This is closely followed by Myanmar, where respondents similarly chose floods (68.6%), drought and heat waves (59.3%) and storms and typhoons (57.1%) as the top 3 climate impacts. Indonesia (75.7%), Thailand (68.9%), Singapore (47.8%), Brunei (46.6%) and Lao (43.0%) respondents' top climate impact is prolonged drought and heat waves, while Vietnam (60.8%), Malaysia (66.9%), and Cambodia (56.7%) respondents' top climate impact is floods. Ocean warming and unpredictable weather leading to fisheries decline are in the top three concerns for Singapore (43.3%), Malaysia (40.5%), Thailand (40.0%), Cambodia (36.0%), Brunei (35.0%), and Indonesia (34.9%); highest concern for sea level rise and its impact on farmland is in top three of Myanmar respondents (50.4%).

Region



Nationality



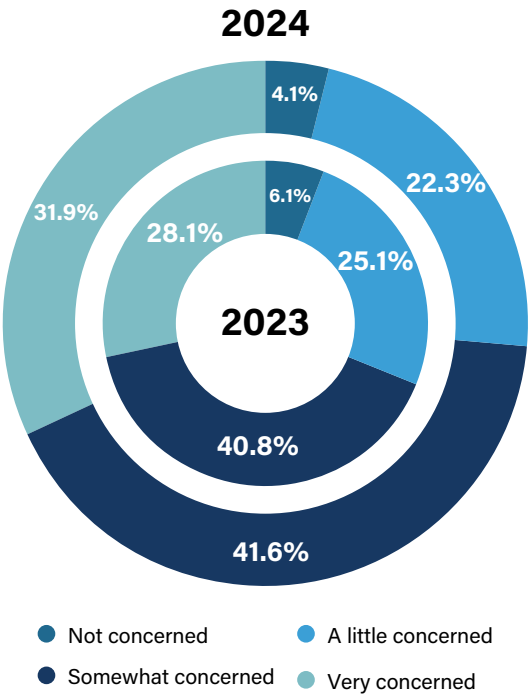
21 How concerned are you about climate change impacts on food availability and affordability in the next 3 years?

Overall, majority of regional respondents express concern that climate change will impact food availability and affordability in the next 3 years.

The percentage of regional respondents who are "very concerned" about climate change impacting food availability and affordability in the next 3 years increased from 28.1% to 31.9%, with respondents from the Philippines expressing the greatest concern (51.8%). The percentage of respondents who are not concerned also reduced from 6.1% to 4.1%. Altogether, 3 in 10 respondents are "very concerned" and 4 in 10 respondents are "somewhat concerned" about food affordability and availability in the next 3 years respectively. Aside from the Philippines, Indonesia (36.3%) and Malaysia (36.3%) have the highest percentage of respondents who are "very concerned".

Approximately 1 in 3 respondents from civil society/ non-government organisations and the government are "very concerned" about climate change impacts on food availability and affordability in the next 3 years. It is hoped that this urgency may translate into better policies and programmes to address the issue of food resiliency in the next few years.

Region



Nationality

	Not concerned	A little concerned	Somewhat concerned	Very concerned
BN	17.5%	32.0%	35.9%	14.6%
KH	11.3%	34.5%	32.4%	21.8%
ID	3.6%	19.8%	40.2%	36.3%
LA	11.8%	24.0%	55.7%	8.6%
MY	3.7%	23.7%	45.8%	26.8%
MM	5.4%	30.4%	43.9%	20.4%
PH	0.9%	14.7%	32.6%	51.8%
SG	4.2%	31.3%	43.9%	20.6%
TH	3.9%	17.8%	58.3%	20.0%
VN	7.2%	33.3%	39.2%	20.3%

Affiliation

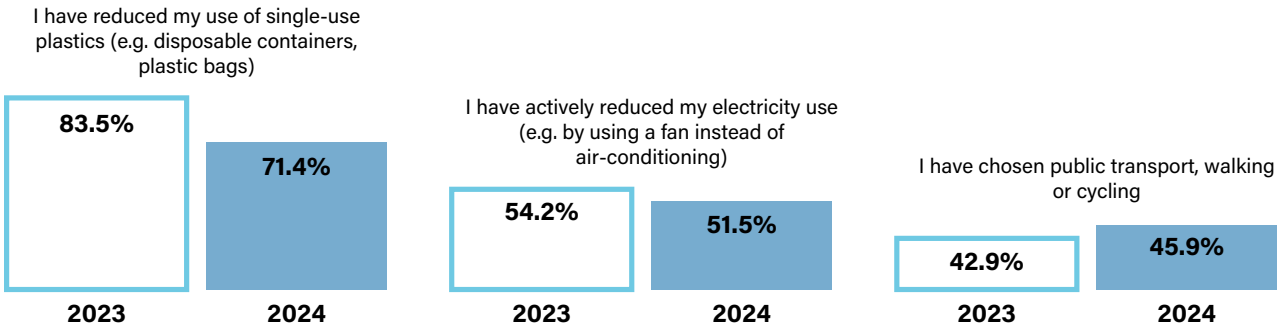
	Not concerned	A little concerned	Somewhat concerned	Very concerned
Academia, Think-Tanks and Research Institutions	8.0%	24.8%	41.6%	25.6%
Business, Finance and Industry	4.5%	24.6%	45.9%	25.0%
Civil Society and Non-Government Organisations	2.1%	23.3%	42.0%	32.6%
Government	4.1%	26.3%	38.7%	30.9%
Media	11.9%	26.1%	41.8%	20.1%
Regional Orgs, IGOs & IOs	7.4%	23.1%	46.3%	23.1%
Retirees & Others	6.8%	24.7%	44.4%	24.1%
Students	7.5%	29.9%	37.6%	24.9%

22 Which changes have you made to your lifestyle for the sake of climate action in the last year? (Check all that apply)

71.4% of regional respondents report making more sustainable lifestyle adjustments by reducing their use of single-use plastics, though this percentage has dropped from 83.5% in 2023. This practice is common across all ASEAN countries with Indonesia (77.7%), the Philippines (75.0%) and Thailand (70.0%) leading the charge against plastics. Additionally, 51.5% of respondents say they have actively reduced their electricity consumption, such as by limiting air conditioning use, a slight decline from 54.2% last year. Brunei has the highest proportion of respondents who claim they have not made any lifestyle adjustments (11.7%). Interestingly, Singapore is the only country where the majority of respondents choose public transport, walking, or cycling (67.8%) - which is expected - given Singapore's excellent public transportation system.

The adjustments to reduce single-use plastics, cut electricity usage, and choose public transportation are more common among those living in large cities than those living in rural areas.

Region (Top 3)



Note: The wording of this question was modified slightly in 2024. In the 2023 survey, the question was "What changes have you made to your lifestyle for the sake of climate action?"

Nationality

	(1) I have chosen public transport, walking or cycling	(2) I have reduced my air travel	(3) I have switched from an internal combustion engine to an electric vehicle	(4) I have grown my own food because of concern of climate change impact on food availability	(5) I have reduced or eliminated my meat consumption	(6) I have actively reduced my electricity use (e.g. by not using air conditioning)	(7) I have purchased secondhand items	(8) I have reduced my use of single-use plastics (e.g. disposable containers, plastic bags)	(9) I have paid to offset my carbon footprint (e.g. Renewable Energy Certificates, airline carbon offsets)	(10) None of the above
Region	**45.9%**	**21.3%**	**21.0%**	**27.1%**	**20.0%**	**51.5%**	**24.4%**	**71.4%**	**15.6%**	**1.9%**
BN	18.4%	26.2%	10.7%	16.5%	7.8%	35.0%	27.2%	50.5%	10.7%	11.7%
KH	29.5%	20.4%	20.0%	28.7%	16.7%	31.6%	23.3%	43.6%	19.3%	3.3%
ID	47.5%	24.0%	20.9%	24.3%	19.3%	50.6%	18.7%	77.7%	10.6%	1.1%
LA	21.3%	13.1%	16.7%	28.5%	8.1%	23.1%	18.6%	41.2%	10.4%	8.6%
MY	35.1%	25.1%	11.4%	22.7%	21.7%	50.5%	23.4%	67.9%	16.4%	4.7%
MM	43.9%	18.9%	20.0%	23.2%	11.8%	43.2%	28.6%	62.5%	13.9%	4.6%
PH	54.4%	15.9%	14.4%	30.6%	22.6%	57.4%	29.7%	75.0%	11.5%	1.8%
SG	67.8%	18.2%	7.2%	8.1%	24.8%	53.1%	29.9%	62.1%	12.8%	5.4%
TH	39.7%	21.4%	21.4%	25.8%	17.5%	50.0%	22.5%	70.0%	21.7%	2.5%
VN	44.4%	19.4%	33.1%	36.1%	25.3%	58.6%	32.5%	63.9%	30.0%	0.8%

City Type

	(1)	(2)	(3)	(4)	(5)	(6)	(7)	(8)	(9)	(10)
Metropolitan	50.1%	21.3%	21.1%	23.3%	21.3%	51.4%	27.3%	66.9%	18.9%	2.8%
Mid size	36.6%	18.7%	14.9%	30.0%	17.7%	46.1%	25.8%	62.6%	11.3%	4.0%
Town	31.3%	20.2%	15.5%	24.8%	14.7%	40.7%	21.4%	58.5%	15.3%	5.6%
Rural	27.2%	12.9%	12.9%	28.1%	10.3%	35.3%	18.8%	51.3%	11.2%	4.5%

SECTION III

CLIMATE TRANSITION ISSUES

Pages

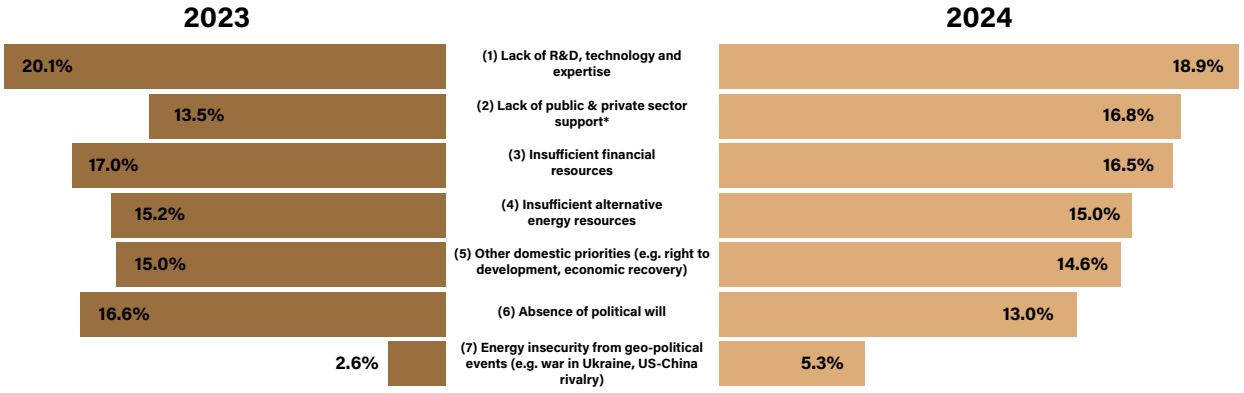
29-40

23 Decarbonisation is understood as the process of reducing or removing greenhouse gas emissions from economic activities. The biggest obstacle to decarbonisation in my country is...

Regional respondents identify the lack of R&D, technology and expertise (18.9%), as the biggest obstacle to decarbonisation followed by the lack of private and public sector support (16.8%) and insufficient financial resources (16.5%). These findings resonate with studies that highlight limitations in technologies, commercial interests and finance as key impediments to decarbonisation.[7] The absence of political will (13.0%) is seen as a less significant challenge, compared to the results of last year's survey (16.6%) indicating a growing policy momentum towards decarbonisation efforts. Only 5.3% of respondents attribute geopolitical events such as the war in Ukraine and US-China rivalry as a challenge to decarbonisation, despite emerging discourse on the impact of great power conflicts on the region's energy transition.

The lack of R&D, technology and expertise as a challenge to decarbonisation receives the highest levels of recognition by respondents from Vietnam (25.6%) and Laos (26.7%), two countries where the development of renewable energy have been impeded by the limitations of existing grids and other technologies. At the country level, Thailand respondents believe that other domestic priorities (19.7%) are the biggest challenge to decarbonisation, while in the Philippines, the lack of alternative energy resources is seen as the most significant impediment (22.9%), despite the country's substantial geothermal and hydropower capacity.

Region



**Note: The option "Lack of private sector support" was added in 2024*

Nationality

	(1)	(2)	(3)	(4)	(5)	(6)	(7)
BN	18.4%	20.4%	8.7%	19.4%	16.5%	9.7%	6.8%
KH	21.8%	23.3%	15.6%	15.6%	3.3%	8.7%	11.6%
ID	19.8%	18.7%	15.4%	13.7%	16.8%	13.7%	2.0%
LA	26.7%	16.3%	24.9%	8.6%	7.2%	7.2%	9.0%
MY	15.1%	17.4%	17.4%	12.4%	15.4%	17.1%	5.4%
MM	23.6%	18.6%	9.3%	15.7%	7.5%	16.1%	9.3%
PH	9.7%	14.4%	19.4%	22.9%	10.9%	16.5%	6.2%
SG	6.3%	27.8%	7.8%	34.3%	10.1%	6.0%	7.8%
TH	17.2%	17.2%	13.9%	9.2%	19.7%	13.6%	9.2%
VN	25.6%	11.1%	21.9%	14.4%	13.9%	6.7%	6.4%

[7] Seah et al., "Planning Southeast Asia's Decarbonisation Pathways: Insights for Policy-Making."

24 What is your top concern about the impact of transitioning to renewable energy/cutting fossil fuels?

Rising energy prices and cost of living (54.4%) is the biggest concern regarding energy transition in the region, with a majority of respondents in Indonesia, Malaysia, the Philippines, Singapore, Thailand and Vietnam choosing this option. These perceptions demonstrate that despite the falling cost of renewables in Southeast Asia, energy transition continues to be associated with higher energy prices. The second and third largest concerns are energy shortages (20.8%) and loss of jobs (9.3%). Brunei respondents form the largest group among those who are worried about loss of jobs, which is a reflection of the national economy's dependence on the fossil fuel industry. Respondents from Myanmar (16.8%) and Cambodia (14.2%) express more concern about widening social inequality compared to other countries.

Respondents from the lowest income group express the highest levels of concerns regarding both loss of jobs (13.5%) and widening social inequality (10.1%), highlighting the importance of developing policy frameworks that can address the socio-economic impacts of decarbonisation in the region.

Region

	Rising energy prices and cost of living	Energy shortages	Loss of jobs	Widening social inequality	I do not foresee negative impacts	Others
Region	**54.4%**	**20.8%**	**9.3%**	**8.2%**	**6.6%**	**0.7%**
BN	36.9%	17.5%	21.4%	7.8%	16.5%	0.0%
KH	35.6%	23.6%	16.7%	14.2%	9.8%	0.0%
ID	57.3%	19.3%	9.2%	7.8%	6.1%	0.3%
LA	47.1%	15.8%	15.8%	8.6%	11.8%	0.9%
MY	62.2%	17.7%	6.4%	6.4%	7.0%	0.3%
MM	43.9%	18.2%	13.6%	16.8%	5.7%	1.8%
PH	51.2%	23.5%	10.0%	4.1%	9.4%	1.8%
SG	63.0%	17.9%	7.2%	6.9%	3.9%	1.2%
TH	58.3%	18.3%	5.0%	10.3%	7.2%	0.8%
VN	51.9%	27.5%	9.2%	6.7%	4.2%	0.6%

Income group

	Rising energy prices and cost of living	Energy shortages	Loss of jobs	Widening social inequality	I do not foresee negative impacts	Others
Highest income	55.2%	21.8%	8.7%	6.8%	6.6%	0.9%
Middle income	53.7%	20.5%	9.4%	8.8%	7.0%	0.7%
Lowest income	47.5%	19.0%	13.5%	10.1%	8.7%	1.1%

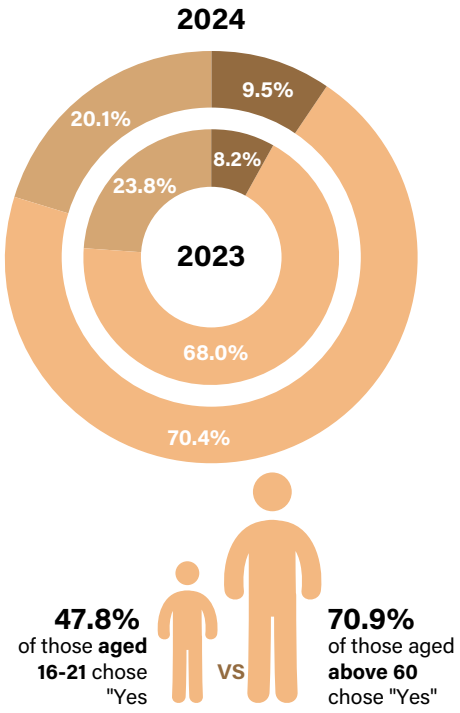
25 Would you support a national carbon tax?

70.4% of regional respondents, up from 68.0% last year, support a national carbon tax whereas 20.1% remain unsure and 9.5% will oppose it. The strongest supporters of a national carbon tax come from Vietnam (75.0%), Indonesia (73.5%) and the Philippines (72.1%) whereas the highest opposition are from Brunei (23.3%), Cambodia (20.7%) and Singapore (20.0%). Singapore was the first country in Southeast Asia to implement a nominal carbon tax on companies in 2019. Indonesia imposed a carbon tax on coal-fired power plants in April 2022.[8]

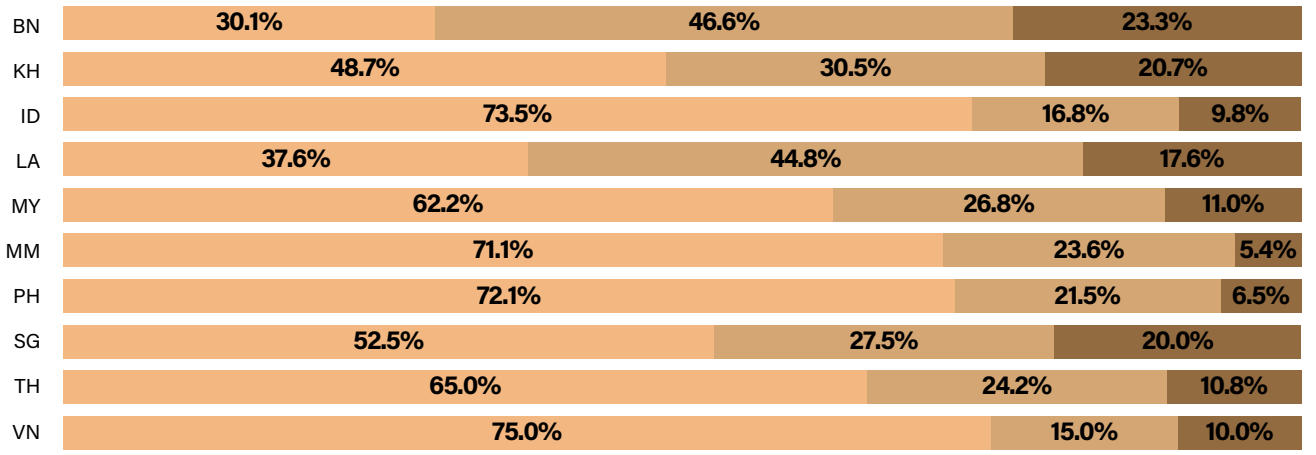
Brunei and Laos respondents express the greatest uncertainty towards any form of carbon tax at 46.6% and 44.8% respectively. Interestingly, the highest income group has a greater tendency to support a national carbon tax on companies engaged in GHG emitting activities at 72.1% whereas only 49.5% of those from the lowest income group support the idea.

Across age groups, the level of support for a national carbon tax tends to fall generally with age with the youths expressing least support (47.8%) whereas those above 60 are most supportive (70.9%).

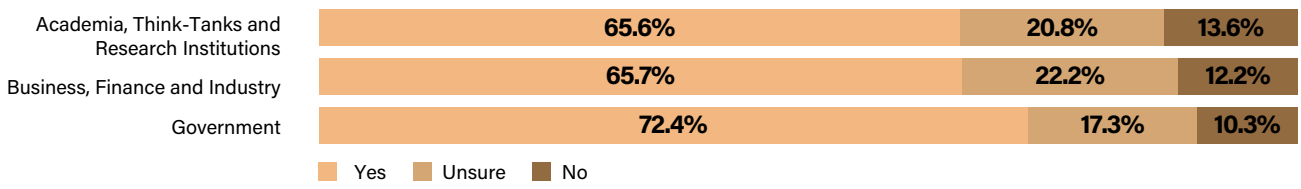
Region



Nationality



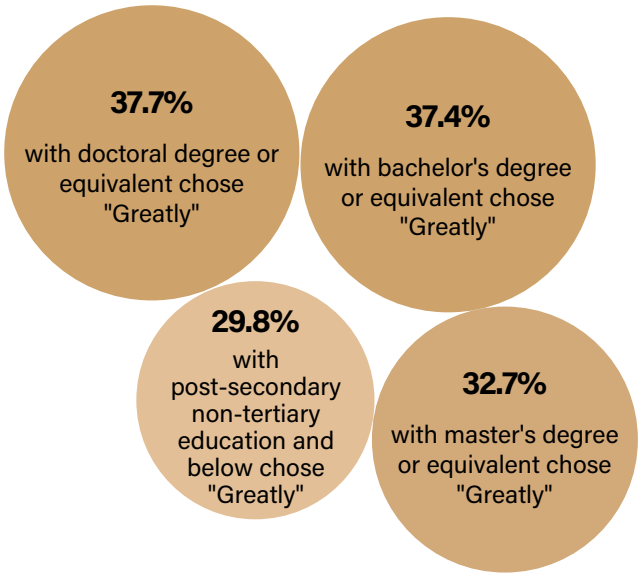
Affiliation (Top 3 who chose "Yes")



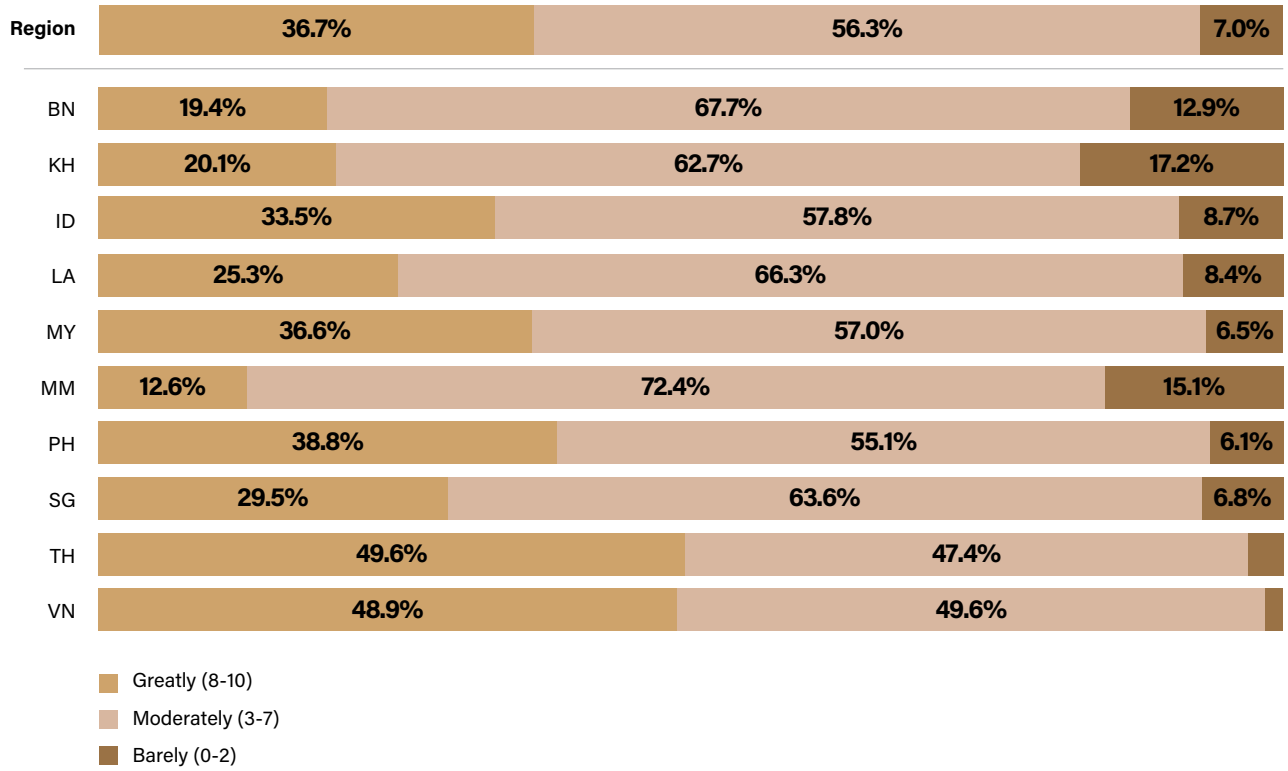
[8] Asian Development Bank, "Key Indicators for Asia and the Pacific 2024."

26 Carbon tax policy will entail an increase in energy, food, and service prices as companies are expected to pass on some degree of their tax burden to consumers. On a scale of 0-10, how willing are you to pay for this as a consumer?

Encouragingly, 93.0% of regional respondents who responded positively in the previous question are willing to take on a share of the tax burden as an individual consumer with 36.7% of them expressing greater willingness and 56.3% saying they are somewhat willing to share the burden. At the country level, Thailand (49.6%) and Vietnam (48.9%) respondents are more willing to pay as consumers whereas Cambodia (17.2%) and Myanmar (15.1%) are least willing. It will also not come as a surprise that the lower educated group of respondents are far less willing to bear the burden as opposed to those who hold bachelor's (37.4%), masters (32.7%) and doctoral degrees (37.7%).



Nationality



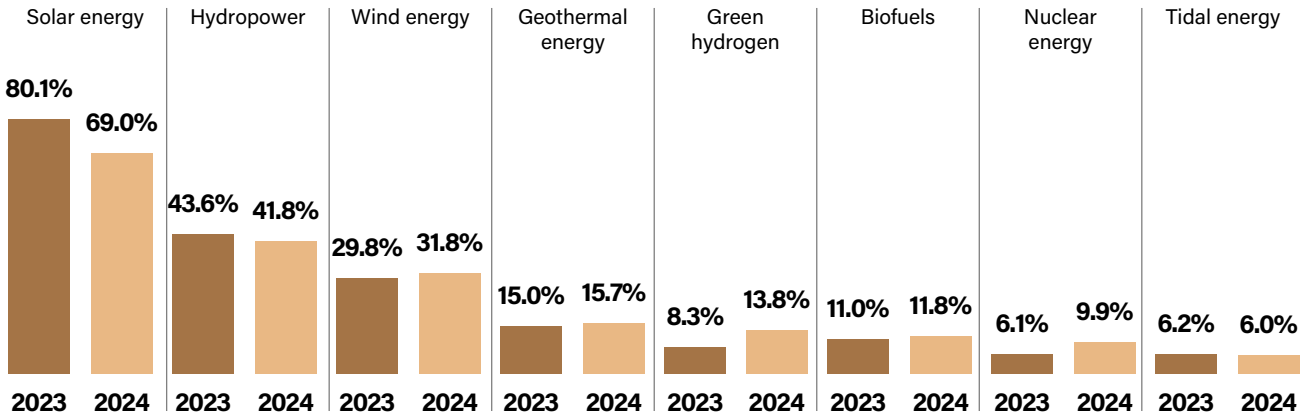
27 In your view, which sources of clean energy have the greatest potential in your country (Select your top two choices)?

As with the previous year, solar energy (69.0%), hydropower (41.8%) and wind energy (31.8%) remain as the top three potential clean energy sources. The most notable shifts come from top ranked solar energy where support dropped by 11.1%. Most of those who switched shifted to green hydrogen (13.8%) and nuclear energy (9.9%), both of which rose one spot in rankings, displacing biofuels (11.8%) and tidal energy (6.0%).

Despite its mid-tier ranking, green hydrogen is arguably the biggest winner in the group. There is a near doubling of support in Malaysia (12.7% to 23.4%) and Indonesia (7.8% to 13.7%) while support more than doubled in Vietnam (6.5% to 15.3%). This is linked to the release of national hydrogen strategy reports by the three countries in the past year.

Finally, regional support for nuclear energy increased from 6.1% to 9.9% year-on-year with Singapore increasing its support from 14.7% to 20.3%, the Philippines almost doubling its support from 8.5% to 17.6% followed by Thailand from 7.2% to 12.5%.

Region



Nationality

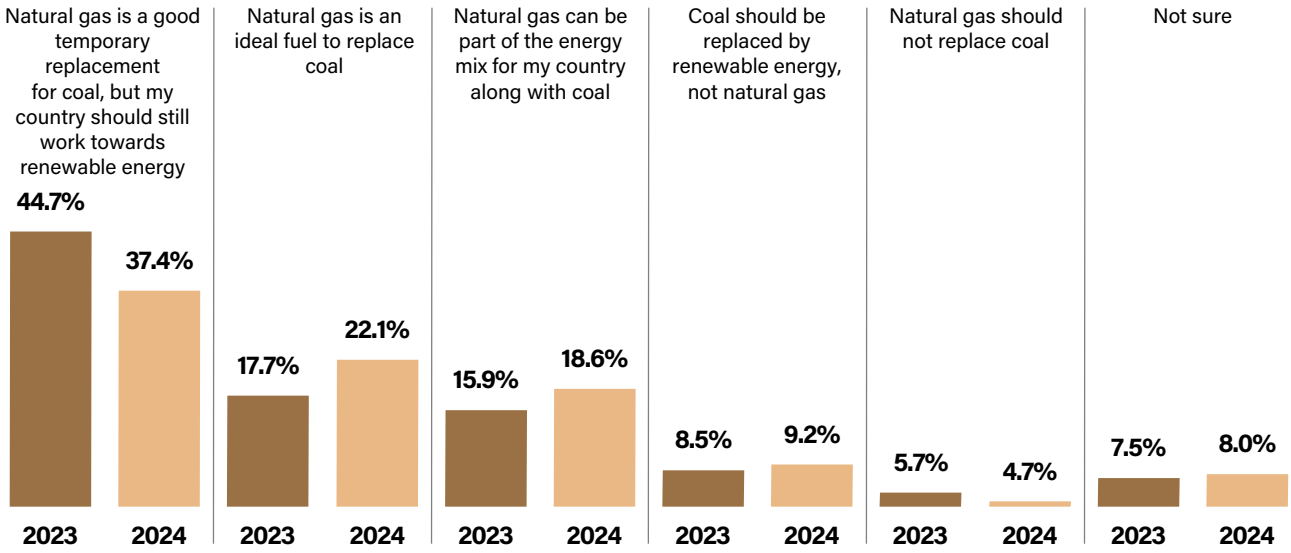
	Solar energy	Hydropower	Wind energy	Geothermal energy	Green hydrogen	Nuclear energy	Biofuel	Tidal energy
BN	77.7%	20.4%	33.0%	11.7%	23.3%	1.0%	20.4%	12.6%
KH	52.7%	48.0%	31.6%	14.2%	17.1%	10.2%	15.6%	10.5%
ID	63.1%	56.1%	22.1%	24.3%	13.7%	6.4%	9.8%	4.5%
LA	51.1%	64.7%	33.0%	9.5%	8.1%	6.3%	10.0%	17.2%
MY	77.3%	40.1%	19.1%	6.0%	23.4%	6.4%	22.1%	5.7%
MM	66.4%	65.7%	16.1%	4.6%	19.6%	8.2%	14.6%	4.6%
PH	72.4%	31.8%	38.8%	20.0%	7.9%	17.6%	8.2%	2.6%
SG	78.2%	17.0%	19.7%	6.0%	31.3%	20.3%	17.0%	10.4%
TH	75.6%	35.8%	36.7%	6.7%	9.4%	12.5%	15.8%	6.4%
VN	77.5%	6.1%	60.3%	5.8%	15.3%	10.3%	12.2%	12.5%

28 Natural gas is a fossil fuel which produces fewer greenhouse emissions than coal. Which statement best describes your view of natural gas?

37.4% of regional respondents believe that natural gas is a good temporary replacement for coal while countries develop renewable energy, making this the most popular opinion across the region. 22.1% respondents think that natural gas is an ideal fuel to replace coal while 18.6% want both coal and natural gas as part of their country's energy mix. Compared to last year's results, there has been a decrease in the number of people who believe that natural gas is only a temporary replacement from 44.7% to 37.4%, while perceptions of natural gas being an ideal replacement for coal has increased slightly from 17.7% to 22.1%. Less than 5.0% of respondents think that natural gas should not replace coal while 8.0% are not sure. Respondents from Indonesia, which is the region's largest gas supplier, are the strongest supporters of using gas as a temporary replacement for coal (43.3%), followed by respondents from Singapore (41.2%), which depends on gas for more than 90% of its electricity generation. The largest group of respondents who believe that natural gas should not replace coal is from Cambodia (20.4%), while respondents from Myanmar (26.4%) and Malaysia (21.4%) are more likely to support the use of both coal and gas.

Older people are more convinced that gas can only be a temporary replacement for coal, while the largest group among those who view natural gas as an ideal replacement for coal is aged between 36-45 years old.

Region



Nationality

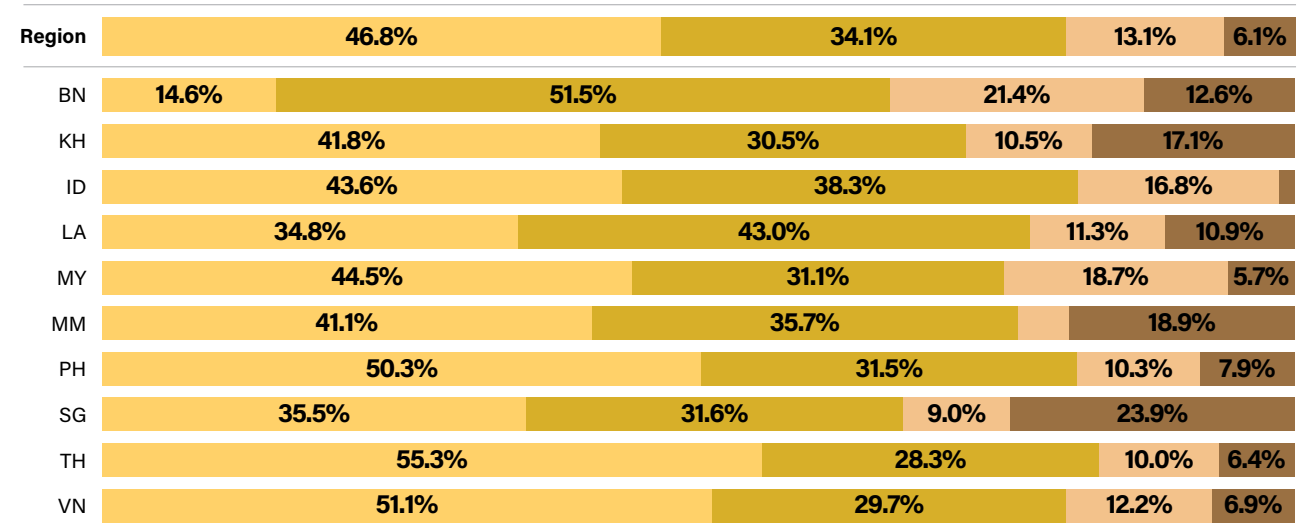
	Natural gas is a good temporary replacement for coal, but my country should still work towards renewable energy	Natural gas is an ideal fuel to replace coal	Natural gas can be part of the energy mix for my country along with coal	Coal should be replaced by renewable energy, not natural gas	Natural gas should not replace coal	Not sure
BN	26.2%	22.3%	12.6%	5.8%	14.6%	18.4%
KH	22.5%	23.3%	16.0%	6.2%	20.4%	11.6%
ID	43.3%	18.4%	20.1%	8.4%	3.9%	5.9%
LA	12.7%	22.2%	15.4%	9.0%	14.9%	25.8%
MY	36.8%	22.4%	21.4%	10.7%	4.3%	4.3%
MM	14.3%	28.9%	26.4%	3.9%	9.6%	16.8%
PH	39.4%	23.5%	19.7%	9.4%	1.5%	6.5%
SG	41.2%	18.2%	14.6%	10.1%	2.7%	13.1%
TH	33.3%	22.8%	16.1%	13.1%	3.1%	11.7%
VN	38.6%	27.8%	10.8%	10.3%	6.1%	6.4%

29 Fossil fuel subsidies can hinder clean energy transition. Should fossil fuel subsidies be cut in your country?

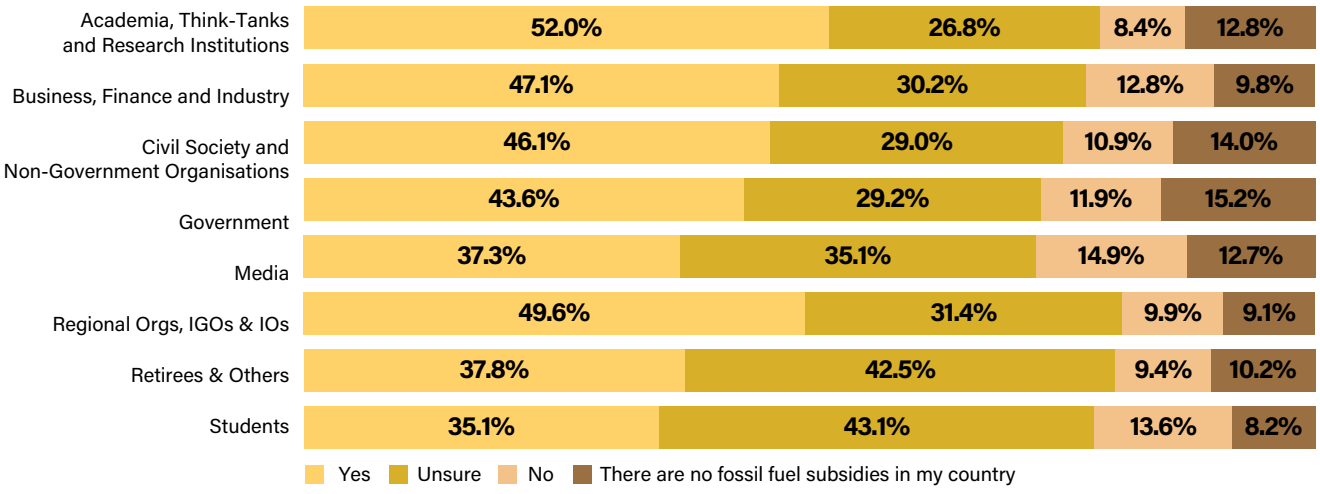
46.8% of regional respondents support cutting fossil fuel subsidies. This is an encouraging finding, as fossil fuel subsidies are a significant impediment towards the rapid deployment of renewable energy. However, the results also show that almost one in three regional respondents (34.1%) are unsure about fossil fuel subsides, indicating that there is scope for building public awareness about the negative environmental and economic impacts of subsidies. Only 13.1% of respondents are against cutting subsidies, while 6.1% think that their country does not have fossil fuel subsidies. Respondents from Thailand (55.3%), Vietnam (51.1%) and the Philippines (50.3%) are the strongest supporters of cutting fossil fuel subsidies, while significant numbers of Brunei (51.5%) and Lao (43.0%) respondents are unsure about the issue. The greatest resistance against cutting subsidies comes from Brunei respondents (21.4%), while Singapore (23.9%) and Myanmar (18.9%) respondents are most likely to believe that their country does not have subsidies.

Respondents from academia, think-tanks and research institutions, regional and international organisations and business and industry are more likely to support the cutting of fossil fuels. Significant numbers of students and retirees are unsure, while 14.9% of respondents from media support the continuation of fossil fuel subsidies.

Nationality

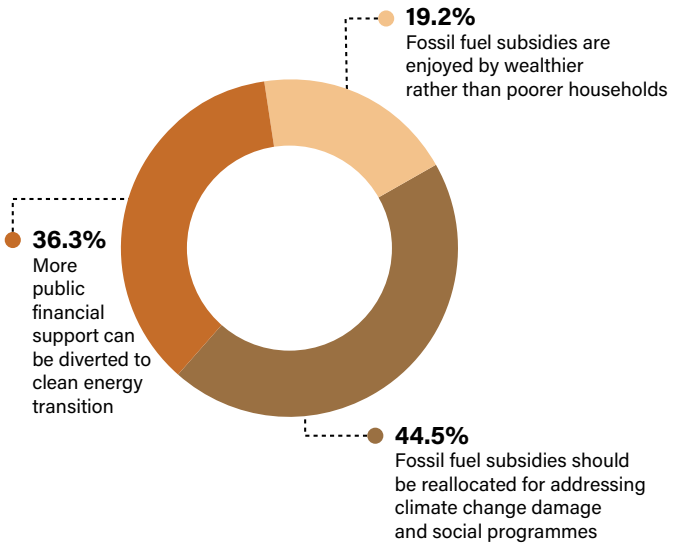


Affiliation



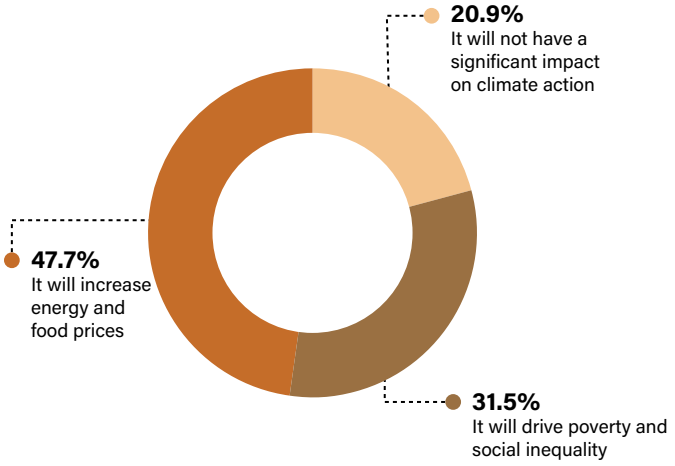
30 Why did you choose "Yes" in the previous question? Choose the most important reason.

44.5% of regional respondents who support the cutting of fossil fuels say that they believe that funds can be reallocated for addressing climate damage and social programmes. Creating discourse and political will to reallocate subsidies toward meaningful climate adaptation and social initiatives, such as education, public health, disaster responses, and social support for those affected by climate hazards, is therefore crucial. Meanwhile, 36.3% think that reducing subsidies would allow more public funds to be diverted to energy transitions. Nearly 1 in 5 regional respondents (19.2%) believe that fossil fuel subsidies primarily benefit wealthier households.



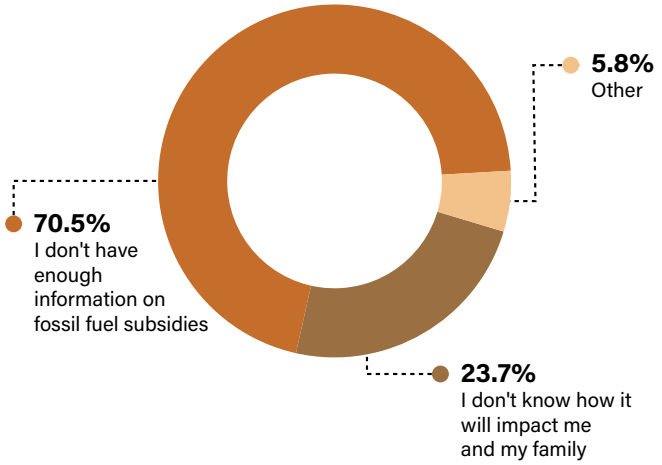
31 Why did you choose "No" in the previous question? Choose the most important reason.

47.7% of regional respondents who do not support the cutting of fossil fuels are concerned about energy and food prices, reflecting a widespread belief that reducing these subsidies will negatively impact the economy. 31.5% of this group are concerned that the cutting of subsidies will drive poverty and social inequality, while 20.9% believe that it will not have a significant impact on climate change.

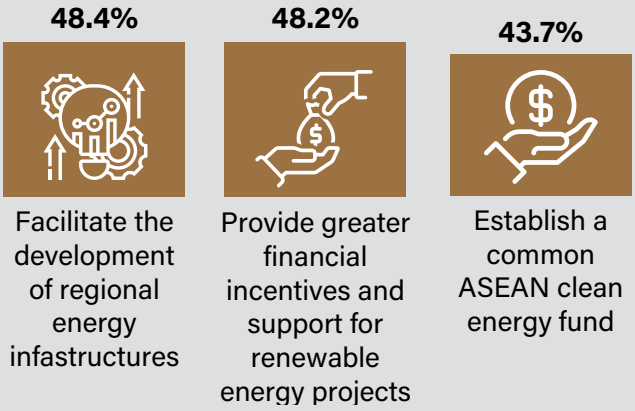


32 Why did you choose "Unsure" in the previous question? Choose the most important reason.

Majority of regional respondents (70.5%) are unsure about fossil fuel subsidies due to a lack of information on the issue, while 23.7% are not aware of the specific impact of subsidies on themselves and their families and 5.8% chose other reasons. Other reasons mentioned in open-ended answers include the lack of affordable and viable alternative renewable energy and the importance of fossil fuels as commodities for their country's economic growth.



33 What should ASEAN do to accelerate a clean energy transition? (Choose 3 options)



According to regional respondents, the biggest priority for ASEAN in accelerating energy transition is the development of regional energy infrastructures (48.4%), which speaks to the findings of recent modelling studies that demonstrate that regional grids can enhance the uptake of renewable energy and reduce the environmental footprint of decarbonisation.[9] The second and third priorities are financial incentives and support for renewable energy projects (48.2%) and a common ASEAN clean energy fund (43.7%). These perceptions highlight the concerning gap in green finance - current annual investment in renewables in Southeast Asia is approximately US$30 billion, against a requirement of US$230 billion to 2050.[10] 39.4% of regional respondents believe that ASEAN should facilitate the training of energy officials, while 39.2% support the adoption of a renewable energy agreement. Only 22.1% of regional respondents think that ASEAN should support the setting up of a regional carbon trading system.

Respondents from Indonesia are the biggest proponents of regional energy infrastructures (65.6%), followed by Laos (50.7%) and Malaysia (50.2%). Respondents from Thailand (54.7%) place the greatest emphasis on harmonisation of energy efficiency standards, while facilitation of cross-border electricity trade is prioritised by Lao respondents (41.2%), the region's largest electricity exporter, and import-dependent Singapore (32.8%). Brunei respondents express the highest levels of support for the training of energy officials (53.4%) and establishing a clean energy fund (52.4%).

Region

	Facilitate the development of regional energy infastructures	Provide greater financial incentives and support for renewable energy projects	Establish a common ASEAN clean energy fund	Facilitate training and education of energy officials	Adopt a regional renewable energy agreement	Harmonise energy efficiency standards	Facilitate cross-border electricity trade	Set up a regional carbon trading system
Region	**48.4%**	**48.2%**	**43.7%**	**39.4%**	**39.2%**	**36.2%**	**22.8%**	**22.1%**
BN	35.0%	48.5%	52.4%	53.4%	42.7%	33.0%	17.5%	17.5%
KH	45.1%	49.1%	40.7%	42.9%	34.2%	32.0%	26.5%	29.5%
ID	65.6%	48.6%	35.8%	25.1%	35.5%	48.0%	18.7%	22.6%
LA	50.7%	31.7%	41.6%	44.3%	33.5%	32.1%	41.2%	24.9%
MY	50.2%	49.5%	44.8%	32.4%	39.1%	34.4%	23.7%	25.8%
MM	46.8%	50.4%	41.1%	36.4%	52.9%	31.4%	22.5%	18.6%
PH	47.6%	59.1%	43.8%	46.5%	43.8%	25.0%	18.5%	15.6%
SG	44.2%	48.1%	41.2%	27.8%	46.6%	34.3%	32.8%	25.1%
TH	51.1%	40.6%	41.4%	39.4%	35.8%	54.7%	14.4%	22.5%
VN	43.9%	55.0%	49.2%	46.7%	27.2%	33.6%	20.6%	23.9%

[9] DNV, "ASEAN Interconnector Study: Taking a Regional Approach to Decarbonisation."

[10] International Energy Agency, "Southeast Asia Energy Outlook 2022."

34 Which statement best reflects your view of the use of coal power?

At the regional level, 35.4% of respondents believe that their countries should transition to another fuel source and close existing power plants, with respondents from Thailand (53.3%) being the largest supporters of this pathway. This is also the most popular option among respondents from the Philippines (42.9%), which overtook Indonesia to become the region's most coal dependent country earlier this year. Interestingly, while almost half of Vietnam respondents (49.7%) favour this particular approach to transition, less than a third of Indonesia respondents (27.7%) support it. Approximately a quarter of regional respondents (26.5%) support the continuation of coal power provided that emissions are reduced. This is the most popular opinion in Myanmar (45.0%) and Cambodia (35.6%). Across the region, 18.1% of respondents believe that the use of coal power should be continued but no more new plants should be built, while only 12.4% respondents believe that coal power should be stopped immediately. Currently almost 40% of the region's electricity demand is met through coal power and as reflected in the responses to this question, removing coal will require long-term political commitment towards the development of renewables, and more closely aligning the synergies between economic development and the environment.

The older the respondents, the greater the support for transitioning to a cleaner fuel and closing down power plants. Youths aged between 16-21 years old are most supportive of the continuation of coal use provided that emissions are reduced (31.7%), and want to see the continued use of coal as long as no more coal power plants are built (20.0%) whereas the older age group (above 60 years old) are far more hardline when it comes to transitioning away from coal (56.3%).

Region

	(1) Coal power should be stopped immediately	(2) Coal power usage should continue but emissions should be reduced	(3) Keep using coal, but no more coal power plants should be built	(4) Transition to another fuel source and close existing coal power plants	(5) More coal power plants should be built
Region	**12.4%**	**26.5%**	**18.1%**	**35.4%**	**7.6%**
BN	**11.7%**	**30.1%**	**19.4%**	**23.3%**	**15.5%**
KH	**13.8%**	**35.6%**	**19.6%**	**17.1%**	**13.8%**
ID	**18.2%**	**26.8%**	**23.5%**	**27.7%**	**3.9%**
LA	**11.8%**	**19.5%**	**20.4%**	**30.3%**	**18.1%**
MY	**10.4%**	**29.1%**	**16.7%**	**40.5%**	**3.3%**
MM	**4.3%**	**45.0%**	**21.4%**	**19.6%**	**9.6%**
PH	**14.1%**	**26.8%**	**13.5%**	**42.9%**	**2.6%**
SG	**13.4%**	**15.5%**	**17.6%**	**50.4%**	**3.0%**
TH	**14.2%**	**17.5%**	**12.5%**	**53.3%**	**2.5%**
VN	**7.2%**	**20.3%**	**19.7%**	**49.7%**	**3.1%**

Age

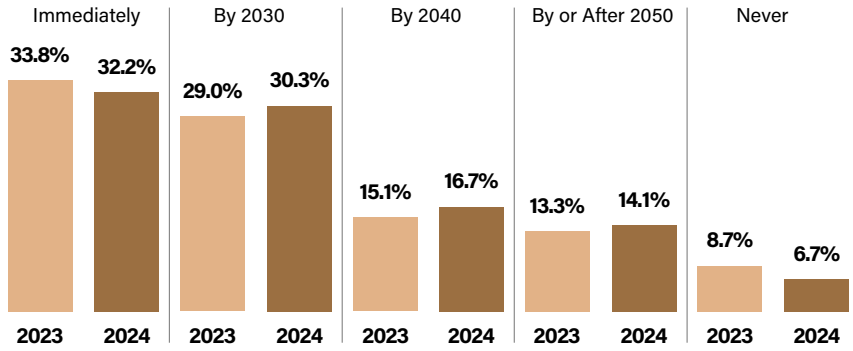
	(1)	(2)	(3)	(4)	(5)
16 - 21	**8.6%**	**31.7%**	**20.0%**	**26.3%**	**13.4%**
Above 60	**14.6%**	**15.2%**	**12.0%**	**56.3%**	**1.9%**

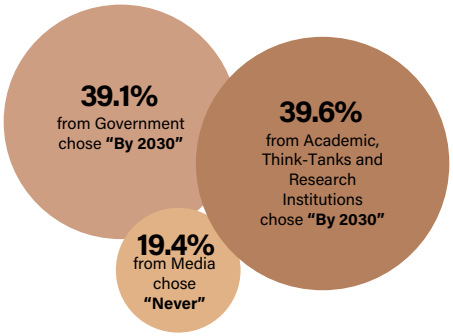
35 My country should phase out coal consumption...

More than 60.0% of regional respondents support phasing out coal either immediately or by 2030. Compared to last year's survey results, support for immediate phasing out has decreased from 33.8% to 32.2%. Conversely, there is also less support for never phasing out coal (declined from 8.7% to 6.7%). Respondents from Indonesia (45.3%), the Philippines (32.9%) and Thailand (29.4%) are the region's biggest supporters for phasing out coal immediately, which reflects growing political and public discourse in these countries on the need to move away from fossil fuels. Lao respondents are the strongest supporters for never phasing out coal (26.7%) – reflecting almost four times the regional average for this option. This strong support against phasing out can be attributed to growing importance of coal power in the country's energy export industry. More respondents in Cambodia, Thailand (both at 37.8%) and Myanmar (42.9%) support phasing out coal by 2030 compared to other countries. Respondents from Vietnam (23.3%), which has the second largest coal power fleet in the region, form the largest group among those who support phasing out coal by or after as late as 2050.

A breakdown of the respondent's profiles shows that respondents from academia, think-tanks and research institutions (39.6%) and government (39.1%) are more likely to support phasing out by 2030, while respondents from media (19.4%) form the largest group among those who never want to phase out coal. The mainstream media's position and thus its influence on climate discourse in the region should be noted.

Region





Nationality

	Immediately	By 2030	By 2040	By or After 2050	Never
BN	23.3%	33.0%	14.6%	14.6%	14.6%
KH	13.1%	37.8%	18.9%	20.0%	10.2%
ID	45.3%	19.8%	15.1%	12.0%	7.8%
LA	14.9%	33.0%	14.5%	10.9%	26.7%
MY	20.4%	35.5%	21.4%	16.7%	6.0%
MM	14.3%	42.9%	20.4%	13.9%	8.6%
PH	32.9%	36.2%	14.1%	12.1%	4.7%
SG	18.2%	35.8%	23.0%	19.4%	3.6%
TH	29.4%	37.8%	16.1%	10.6%	6.1%
VN	17.2%	36.4%	19.4%	23.3%	3.6%

SECTION IV

CLIMATE LEADERSHIP AND COOPERATION

Pages

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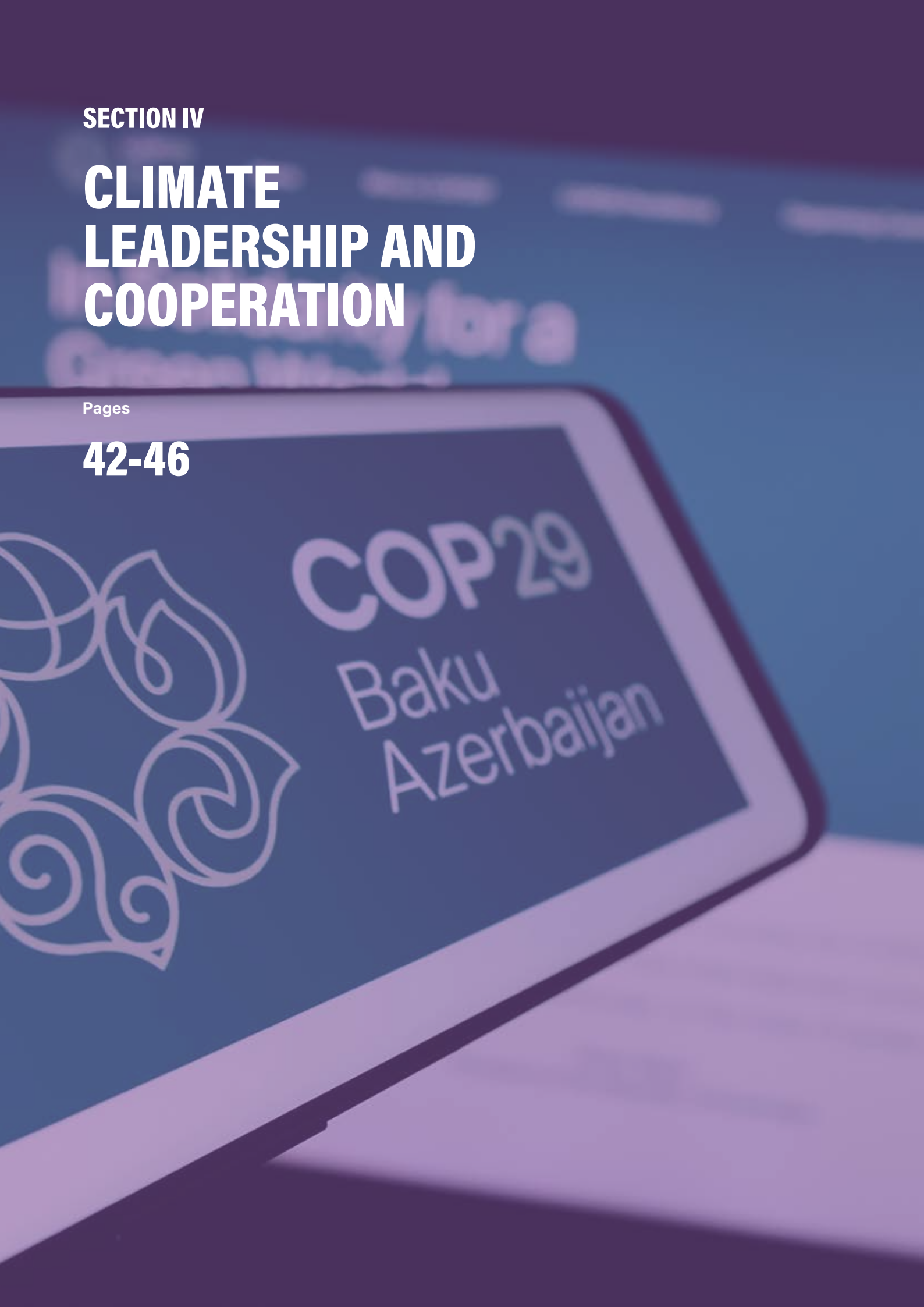
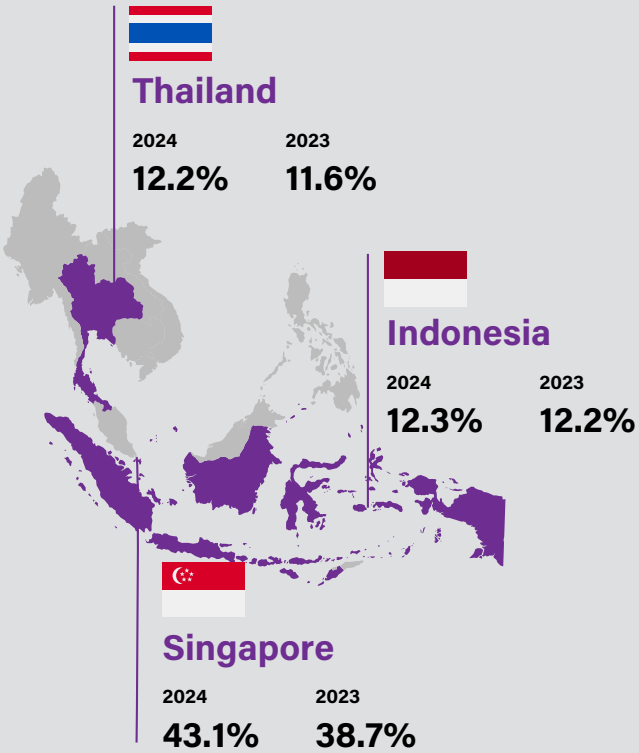


36 Which ASEAN country has potential to be the region's climate leader?

Confidence in Singapore's potential to be the region's climate leader rose from 38.7% last year to 43.1%. Similar to last year, Singapore as a top choice is followed by Indonesia (12.3%) and Thailand (12.2%) at second and third place.

With the exception of Indonesia (61.5%), Thailand (44.7%) and Vietnam (46.7%) respondents voting for their own countries, the rest of Southeast Asia voted for Singapore. Notably, Vietnam respondents shifted from seeing Singapore as a leader last year to voting for their own country as a potential leader. This may be due to the Vietnamese government reaffirming its 2050 net zero pledge followed by progress made in its green transition plans in the 8th Power Development Plan and supported by the Just Energy Transition Partnership. Interestingly, Singapore respondents' confidence in their country has increased from 69.9% to 73.1%. Singapore has been proactively exploring diversification of clean energy sources to lower its emissions which include hydro-powered electricity imports from neighbouring countries, advocating for a regional power grid, hydrogen strategies, and supporting sustainable aviation fuel promotion by imposing an air travel levy on passengers.

Region



Nationality

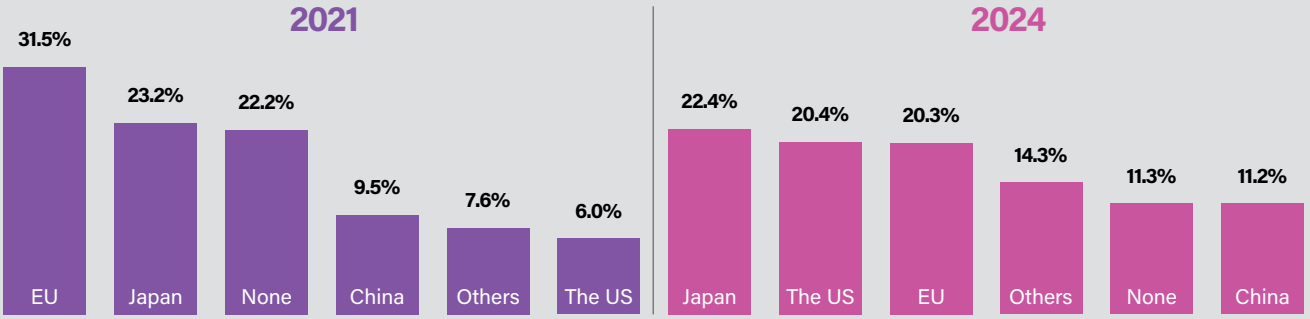
Region	4.5%	4.0%	12.3%	3.2%	6.4%	2.7%	4.7%	43.1%	12.2%	6.8%
BN	21.4%	1.0%	15.5%	1.9%	8.7%	1.9%	2.9%	35.9%	6.8%	3.9%
KH	2.5%	33.5%	7.3%	1.8%	3.6%	1.8%	5.5%	34.5%	6.2%	3.3%
ID	1.7%	1.1%	61.5%	0.3%	2.5%	1.4%	0.6%	23.7%	4.2%	3.1%
LA	1.8%	0.0%	1.8%	24.4%	1.4%	0.5%	2.7%	38.5%	23.1%	5.9%
MY	5.4%	1.3%	8.0%	0.7%	36.1%	0.0%	1.3%	40.1%	5.4%	1.7%
MM	2.1%	1.1%	6.1%	1.4%	2.1%	20.0%	1.8%	48.6%	14.6%	2.1%
PH	2.4%	0.3%	5.0%	0.3%	3.5%	0.3%	26.2%	49.4%	7.9%	4.7%
SG	3.9%	0.9%	11.3%	0.6%	2.4%	0.6%	0.9%	73.1%	5.7%	0.6%
TH	3.6%	0.0%	3.6%	0.3%	1.9%	0.3%	3.9%	39.2%	44.7%	2.5%
VN	1.7%	0.0%	2.5%	1.1%	0.8%	0.3%	0.8%	40.0%	6.1%	46.7%

37 In your opinion, who has demonstrated climate leadership to help the world achieve Paris-aligned goals?

For the first time since this question was asked in 2021, Japan (22.4%) has overtaken the US (20.4%) and the EU (20.3%) as the country which has demonstrated climate leadership in helping the world meet the goals of the Paris Agreement. Although Japan's vote share dropped from 23.2% in 2021 to 22.4% this year, it remains in the lead over the US and the EU. Since rejoining the Paris Agreement in 2021, the US' vote share rose rose from a dismal 6.0% in 2021 to 20.4% in 2024 as the Biden Administration made efforts to change the US domestic climate landscape by passing the Inflation Reduction Act and corral other countries on a few initiatives such as the Global Methane Pledge. Confidence in the EU, on the other hand, dropped from 31.5% in 2021 to 20.3% in 2024 as the Russia-Ukraine war entered into its third year.

The Philippines (32.6%), Indonesia (30.7%) and Brunei (29.1%) express the greatest confidence in Japan whereas Vietnam (31.9%), Myanmar (30.4%), and Laos (28.1%) are most confident in the US' leadership. Singapore remains the most skeptical of global leadership with 26.3% of its respondents saying that no country has demonstrated climate leadership, more than double of 11.3% of regional respondents who share that view.

Region



Nationality

				None of the above					
Region	**22.4%**	**20.4%**	**20.3%**	**11.3%**	**11.2%**	**5.1%**	**4.6%**	**3.2%**	**1.4%**
BN	**29.1%**	**9.7%**	**10.7%**	**13.6%**	**10.7%**	**13.6%**	**4.9%**	**3.9%**	**3.9%**
KH	**20.4%**	**27.6%**	**19.3%**	**4.7%**	**11.6%**	**6.9%**	**4.7%**	**2.5%**	**2.2%**
ID	**30.7%**	**14.0%**	**22.6%**	**10.3%**	**10.9%**	**3.1%**	**4.7%**	**2.8%**	**0.8%**
LA	**14.9%**	**28.1%**	**13.1%**	**7.7%**	**22.6%**	**2.3%**	**7.2%**	**2.3%**	**1.8%**
MY	**26.8%**	**11.0%**	**17.1%**	**10.4%**	**15.7%**	**7.0%**	**6.0%**	**5.0%**	**1.0%**
MM	**21.8%**	**30.4%**	**19.6%**	**8.2%**	**6.8%**	**1.4%**	**2.1%**	**7.5%**	**2.1%**
PH	**32.6%**	**18.2%**	**22.4%**	**7.4%**	**3.5%**	**6.5%**	**6.2%**	**2.6%**	**0.6%**
SG	**13.7%**	**12.5%**	**25.1%**	**26.3%**	**11.9%**	**2.7%**	**3.6%**	**3.0%**	**1.2%**
TH	**21.9%**	**21.4%**	**20.6%**	**14.2%**	**10.3%**	**5.6%**	**3.9%**	**1.9%**	**0.3%**
VN	**13.1%**	**31.9%**	**29.7%**	**9.4%**	**5.8%**	**3.9%**	**4.2%**	**1.4%**	**0.6%**

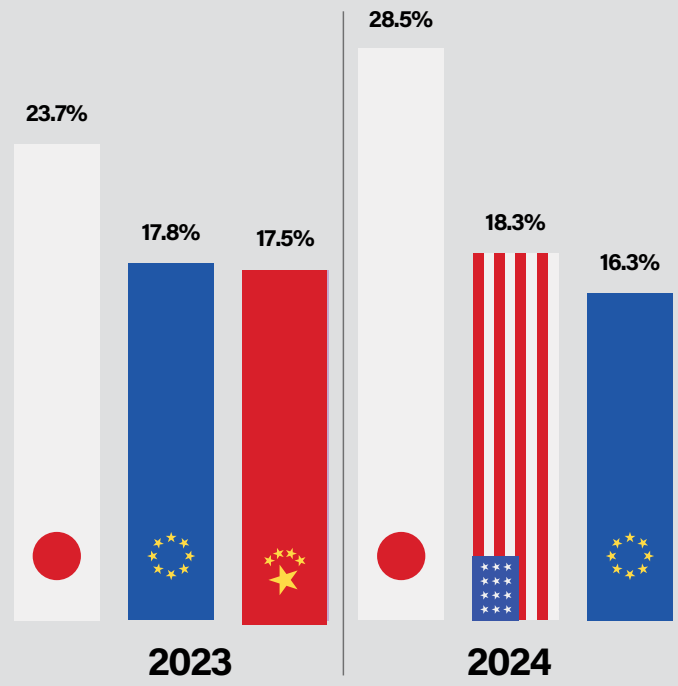
38 Which country is leading in global climate innovation (e.g. developing renewable energy technology, green buildings, nature-based solutions)?

Consistent with last year's survey, Japan remains the most trusted country in the region for leadership in global climate innovation (28.5%), including advancements in renewable energy technology, green buildings, and nature-based solutions. However, this year, the US has surpassed the EU, securing second place with 18.3%, up from 14.1% last year. The EU now ranks third with 16.3%.

Japan is highly favoured in the Philippines (41.2%), Brunei (38.8%), Indonesia (38.8%), Myanmar (30.7%), and Thailand (27.8%). Meanwhile, the US is the top choice in Laos (29.4%) and Cambodia (26.2%). Interestingly, Vietnam and Singapore respondents rank the EU highest, with approval rates of 26.7% and 22.4%, respectively.

Views are divided across educational groups. Those with master's and doctoral degrees (55.2%) favour the EU, while Japan is the top choice for individuals with bachelor's degrees and post-secondary non-tertiary education (61.7%). Meanwhile, the US is most popular among those with secondary education or lower (45.6%).

Region



Nationality

					None of the above				
Region	**28.5%**	**18.3%**	**16.3%**	**14.2%**	**8.3%**	**5.2%**	**4.3%**	**3.7%**	**1.1%**
BN	38.8%	11.7%	6.8%	10.7%	13.6%	6.8%	8.7%	2.9%	0.0%
KH	21.1%	26.2%	15.3%	13.5%	4.4%	4.4%	7.6%	5.5%	2.2%
ID	38.8%	10.1%	18.2%	17.3%	3.6%	5.3%	3.1%	3.1%	0.6%
LA	15.8%	29.4%	9.0%	28.5%	5.0%	5.4%	2.7%	2.7%	1.4%
MY	28.4%	9.0%	14.0%	23.7%	7.4%	7.4%	4.3%	5.0%	0.7%
MM	30.7%	27.5%	12.1%	8.2%	5.7%	3.9%	3.6%	6.1%	2.1%
PH	41.2%	18.8%	17.6%	5.9%	5.3%	3.8%	3.2%	3.2%	0.9%
SG	16.7%	11.9%	22.4%	16.7%	20.6%	2.4%	4.5%	3.9%	0.9%
TH	27.8%	19.2%	16.7%	11.4%	10.3%	6.1%	3.3%	3.3%	1.9%
VN	24.2%	23.6%	26.7%	6.7%	5.0%	6.9%	3.3%	2.5%	1.1%

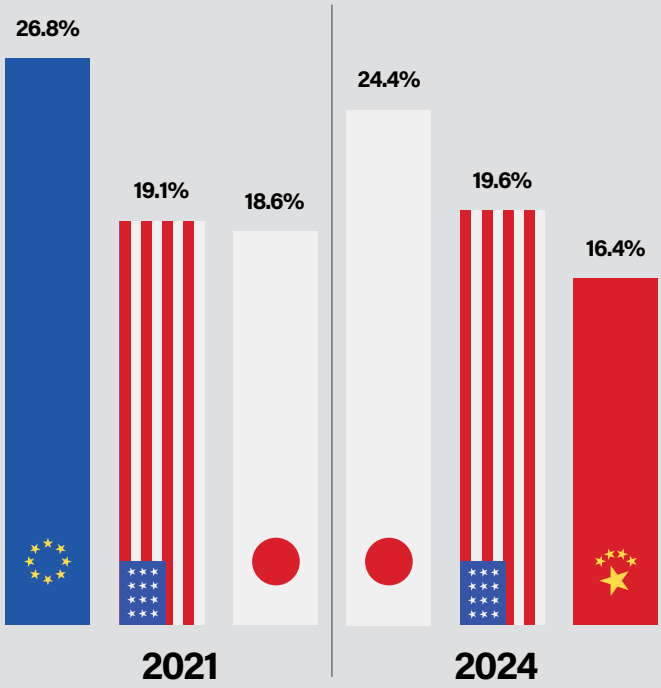
39 Who could play a more proactive role in sharing their climate expertise, practical ability, and technical know-how in your country?

24.4% of respondents believe that Japan has the ability to share its climate expertise, practical ability, and technical know-how in their countries. This is consistent with last year's survey where Japan also topped the rankings.

The Philippines (37.9%), Indonesia (34.6%), and Brunei (29.1%) respondents give the highest approval rating for Japan whereas Laos and Malaysia respondents reserve highest approvals for China at 35.3% and 26.8%.

Japan (24.4%), the US (19.6%) and China (16.4%) are seen as the most attractive collaborators for the sharing of climate expertise among ASEAN countries. Since the 2021 survey, Japan has risen to the top spot while the EU has fallen out of favour, with only 15.5% of respondents who believe it can play a more proactive role. This follows the trend of declining perceptions of the EU's climate leadership seen in previous questions.

Region



Recent climate and sustainability initiatives by the EU such as the Carbon Border Adjustment Mechanism (CBAM) and total ban on palm oil have been strongly protested as protectionist moves by developing countries, especially Indonesia and Malaysia. Indonesia respondents prefer Japan (34.6%) while a quarter of Malaysia respondents lean towards China (26.8%). China is also the most welcomed by Laos respondents (35.3%).

Nationality

					None of the above				
Region	**24.4%**	**19.6%**	**16.4%**	**15.5%**	**8.2%**	**5.1%**	**5.0%**	**4.1%**	**1.7%**
BN	**29.1%**	**6.8%**	**12.6%**	**3.9%**	**16.5%**	**12.6%**	**8.7%**	**7.8%**	**1.9%**
KH	**21.1%**	**24.7%**	**12.7%**	**16.4%**	**4.4%**	**7.3%**	**6.2%**	**3.6%**	**3.6%**
ID	**34.6%**	**12.8%**	**19.0%**	**16.8%**	**4.7%**	**2.5%**	**5.9%**	**3.4%**	**0.3%**
LA	**9.5%**	**25.8%**	**35.3%**	**12.7%**	**4.1%**	**4.1%**	**3.6%**	**2.7%**	**2.3%**
MY	**23.7%**	**14.0%**	**26.8%**	**11.7%**	**6.4%**	**4.7%**	**6.0%**	**4.3%**	**2.3%**
MM	**27.5%**	**27.5%**	**8.2%**	**15.0%**	**6.4%**	**2.1%**	**5.0%**	**6.4%**	**1.8%**
PH	**37.9%**	**21.5%**	**7.9%**	**16.2%**	**3.2%**	**5.0%**	**4.1%**	**2.9%**	**1.2%**
SG	**13.1%**	**17.3%**	**19.4%**	**21.2%**	**16.7%**	**3.0%**	**3.0%**	**3.9%**	**2.4%**
TH	**25.8%**	**21.1%**	**15.6%**	**13.9%**	**11.4%**	**5.6%**	**2.8%**	**3.3%**	**0.6%**
VN	**20.3%**	**22.2%**	**7.5%**	**25.8%**	**8.6%**	**4.2%**	**5.8%**	**3.9%**	**1.7%**

Thank you

We would like to extend our sincere appreciation to all our respondents for taking the time to complete this Survey. Your participation lends an indispensable voice to the opinions of Southeast Asians and allows the region to be heard and be involved in the global discussion on climate change as an ASEAN collective.

We are also grateful to all our readers for their support and feedback as we continuously work to improve the Survey. If you wish to stay updated on the Programme's activities, do sign up for our newsletter at bit.ly/ccseapmail or by scanning the QR code provided. You may email any comments and questions about the Survey to climatechange@iseas.edu.sg.

Acknowledgements

The authors would like to express our deepest gratitude towards fellow ISEAS colleagues and expert reviewers for their invaluable advice. We wish to put on record our appreciation to our Survey translators Pham Thi Phuong Thao, Moe Thuzar, Kyi Sin, Dolphie Bou and Pattanun Arunpreechawat, whose assistance has been critical to the success of the Survey.

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