

THE STATE OF  
**SOUTHEAST  
ASIA**  
**2023**

SURVEY REPORT



**THE STATE OF SOUTHEAST ASIA:  
2023 SURVEY REPORT**

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

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

# ABOUT THE SURVEY

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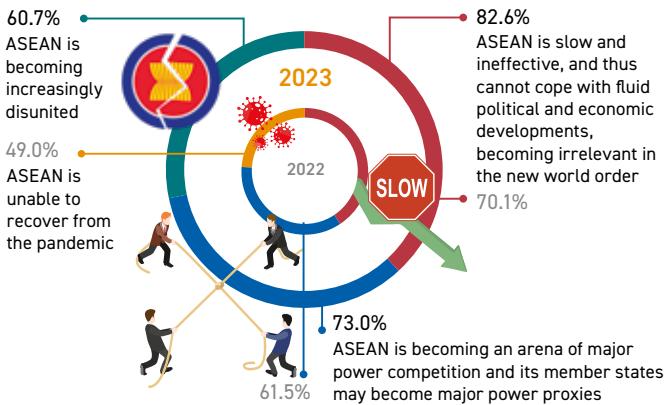
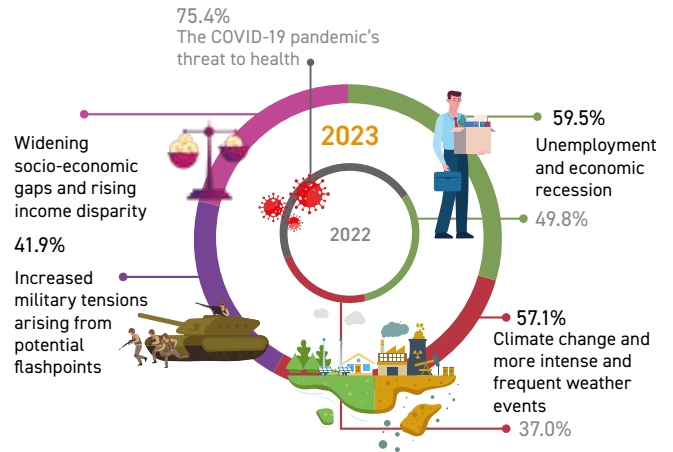
Going into its 5<sup>th</sup> edition, *The State of Southeast Asia* survey continues to gauge the views and perceptions of Southeast Asians on geopolitical developments affecting the region, key international affairs and how ASEAN's Dialogue Partners have engaged with the region over the preceding year. The objective of the survey is to present a snapshot of the prevailing attitudes among those in a position to inform or influence policy. The survey is not meant to present a definitive view of issues in the region. This year's survey was conducted over a period of eight weeks from 14 November 2022 to 6 January 2023. The survey was offered in seven language options – English, Bahasa Indonesia, Burmese, Khmer, Lao, Thai and Vietnamese. A total of 1,308 respondents from ten Southeast Asian countries took part in the survey.

There are six sections in the survey. Section I covers the profile of the respondents by nationality, affiliation and age. Section II deals with questions on the regional outlook and viewpoints on international affairs in the past year. Section III covers regional influence and leadership of major and middle powers. Section IV deals with ASEAN's options in the changing regional political-security architecture. Section V measures perceptions of trust among Southeast Asians towards five countries – China, US, Japan, the European Union and India. Section VI gauges levels of soft power in the region based on travel and tertiary education choices. The questions and results have been reorganised for logical flow and optimal reporting. The figures in this report have been rounded up or down to the nearest one decimal point.

# SURVEY HIGHLIGHTS

1

Almost three years since COVID-19 was declared a global pandemic, Southeast Asia has moved beyond the health concerns of the pandemic to focus on socio-economic impacts that confront them, the effects of climate change and evolving geopolitical tensions. Unemployment and economic recession (59.5%), impacts of climate change (57.1%), the widening of socio-economic gaps and rising income disparity as well as military tensions (tied at 41.9%) are the region's most pressing challenges. Terrorism continues to rank last (11.3%).

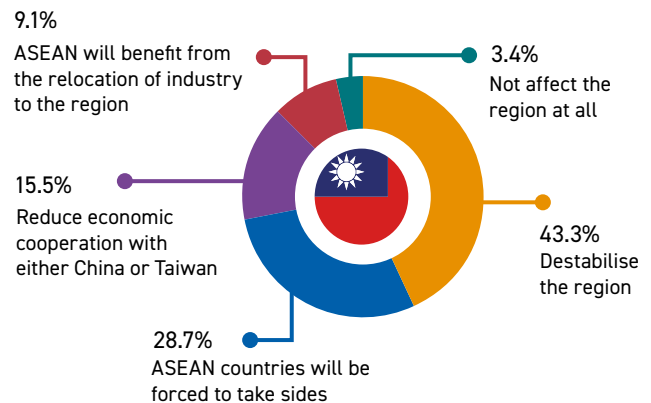


2

Southeast Asians remain most concerned about ASEAN being slow and ineffective, thus not being able to cope with political and economic developments (82.6%). They are also concerned that ASEAN is becoming an arena for major power competition in which its member states may become proxies of major powers (73.0%). In the same vein, 60.7% are worried about ASEAN's disunity. Fears that ASEAN is unable to recover from the pandemic is ranked last (37.2%).

3

Increased tensions in the Taiwan Strait and unresolved disputes with China are the biggest potential flashpoints affecting the region. 43.3% of the respondents fear that the outbreak of hostilities in the Taiwan Strait will destabilise the region. 28.7% feel that ASEAN countries will be forced to take sides while 15.5% feel that it will reduce economic cooperation with either China or Taiwan. Only 3.4% of the respondents say that it will not affect the region at all.



61.5%

Yes

No

15.8%

Not Sure

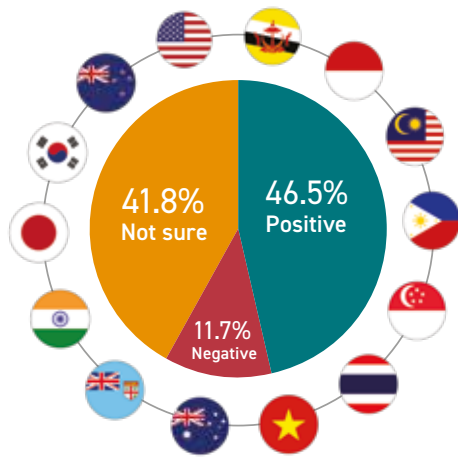
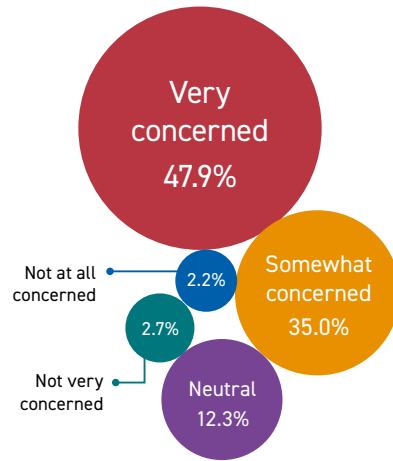
22.7%

4

Nearly two-thirds of the respondents (61.5%) support the accession of Timor-Leste to ASEAN. Only 15.8% disagree and 22.7% are not sure. Of those who approve, close to half (48.7%) believe that it will enhance ASEAN's unity and centrality. One-third (34.4%) of those who disapprove feel that it will slow down ASEAN's economic integration.

# 5

Majority of respondents (82.9%) express their concern over the Russian invasion of Ukraine. Increase in energy and food prices (58.3%), erosion of trust in a rules-based order and violation of national sovereignty (25.9%), and increase in existing divisions within ASEAN (7.4%) are the most serious impacts on Southeast Asia.

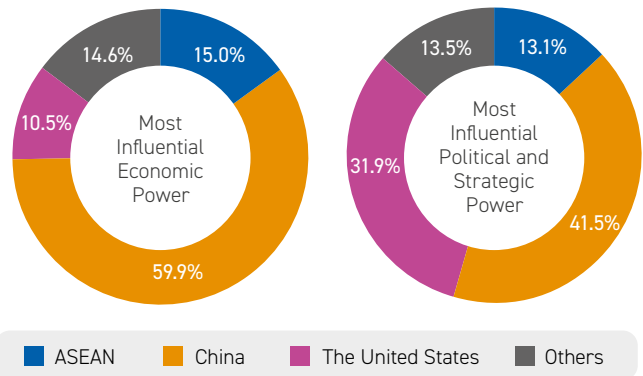


# 6

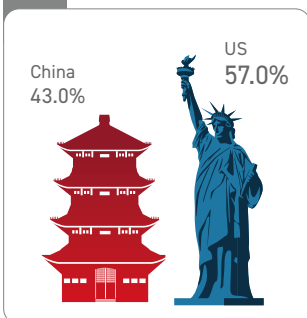
46.5% of the respondents feel that the US-led Indo-Pacific Economic Framework for Prosperity (IPEF)'s overall impact and effectiveness is likely to be positive. 11.7% disagree while 41.8% are uncertain. 30.4% of those who are positive about IPEF feel that it will complement existing ASEAN initiatives while 33.9% of those who are negative feel that it will worsen US-China competition. 33.5% of those who are uncertain expect to see more updates from the negotiations.

# 7

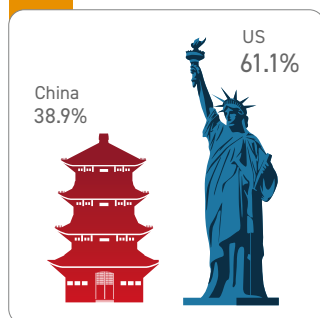
China continues to be seen as the most influential economic (59.9%) and political-strategic (41.5%) power in the region. However, China's growing influence is not well-received by the region. 64.5% of those who view China as the most influential economic power and 68.5% of those who see China as most influential in the political and strategic sphere express their concern about its expanding influence.



2022



2023



# 8

If ASEAN were forced to choose between the two major powers, two-thirds of respondents (61.1%) will cast their lot with the US. China as a choice dropped from 43.0% to 38.9% in 2023. However, when the respondents are assessed by nationality, majority of respondents from Brunei, Malaysia and Indonesia will favour China over the US.

# METHODOLOGY

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The region's challenges have become increasingly complex with each passing year and the number of questions to be surveyed have also increased in tandem. This year's survey questions were carefully designed and curated with the help of a panel of experts.

Putting aside branching questions, the survey comprised **54 questions** in total which takes approximately **30 to 40 minutes** to complete. It was conducted both online and offline using a mixed sampling method. A total of **1,308** Southeast Asians completed the survey. Majority of the respondents — 1,055 self-identified Southeast Asians — took the survey online while another 253 were polled using Computer-Assisted Personal Interview (CAPI) methods with the assistance of a panel provider.

Respondents came from **5 affiliation categories**: (a) academia, think-tankers and researchers; (b) business or finance representatives; (c) civil society, NGO or media representatives; (d) government officials; and (e) regional or international organisations personnel.

A **10% weighting average** was applied to each country's responses to calculate the average figures for ASEAN as a whole. This is to ensure that the responses of each country are represented by equal proportion, given that ASEAN's decision-making processes are based on each country having equal say, regardless of geographical or population size. Final analysis of regional sentiment was conducted on the weighted data set. A strict set of criteria during the data cleaning process was applied to maintain data quality and integrity.

# APPRECIATION

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We would like to extend our deepest appreciation to our institutional partners Dr. Asyurah Salleh and Ms Nafisa Halim of Global Awareness & Impact Alliance (GAIA) of Brunei for helping us to promote this survey in their foreign policy circles.

We are also grateful for the unstinting assistance from the ASEAN Studies Centre interns, Mr Muhammad Afiq Hajis and Mr Chee Ming Wee, Damon, in the collection, cleaning and weighting of the survey data. We also want to extend our thanks to the various ISEAS researchers who helped craft,

curate, and refine earlier drafts of the Survey. In addition, we would like to give a special shout-out to two of ISEAS' most dedicated Research Officers Ms Qiu Jiahui and Ms Rebecca Neo for rendering their invaluable assistance when we needed it the most.

Last but not least, we wish to extend our sincere appreciation to the 1,308 respondents for taking their time to complete this Survey. Your collective voice is demonstrative of the ASEAN Community-In-Action.

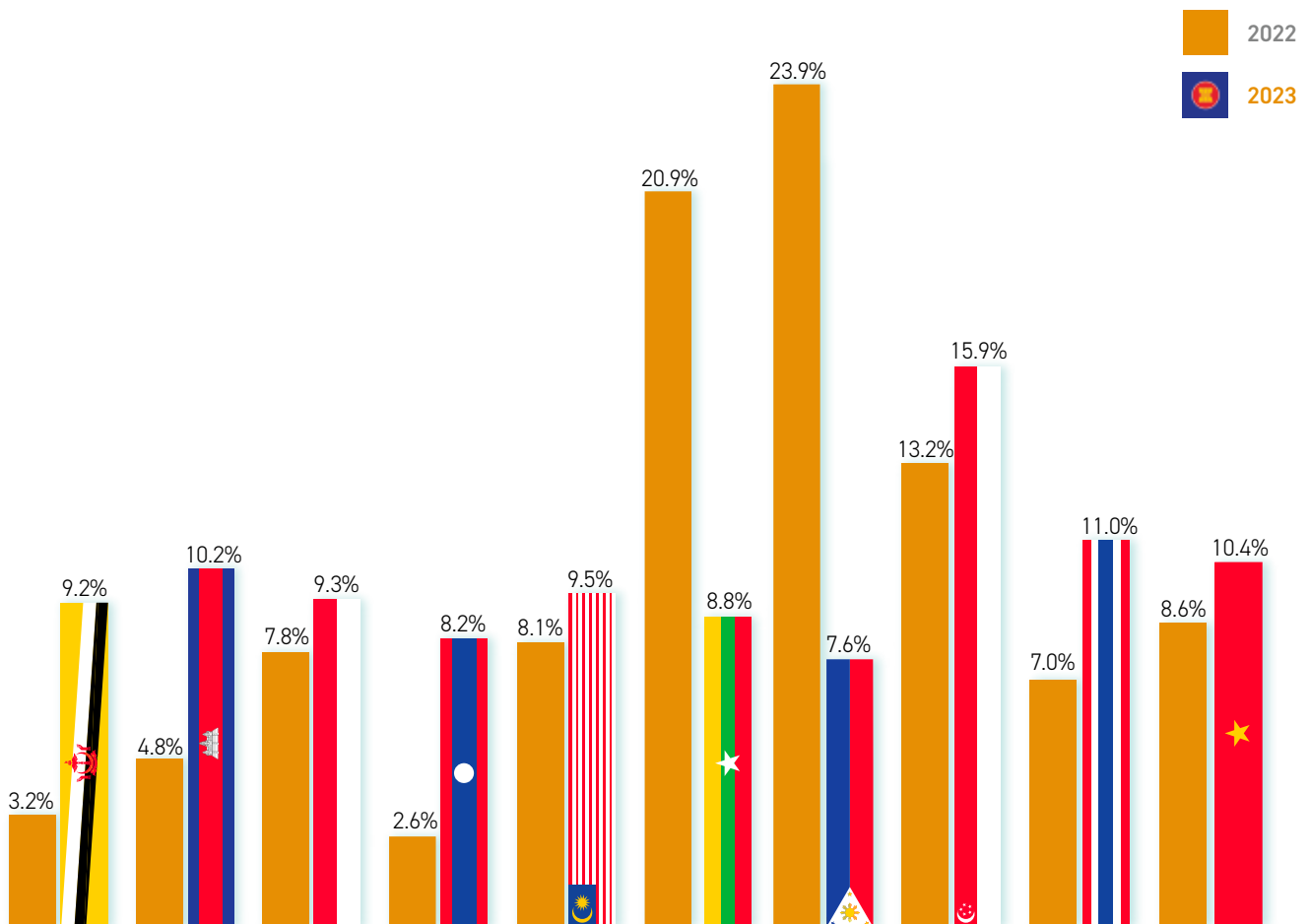
# SECTION I: Respondents' Profile

This section features the background of the survey respondents, including their nationality, affiliation and age distribution. No weighting was applied in this section.

## NATIONALITY

A total of 1,308 respondents from ten ASEAN member states participated in this survey. Singapore led with the highest number of respondents at 208 (15.9%), followed by Thailand at 144 (11.0%) and Vietnam at 136 (10.4%). The breakdown for the rest of the countries is: Cambodia (10.2%), Malaysia (9.5%), Indonesia (9.3%), Brunei (9.2%), Myanmar (8.8%), Laos (8.2%), and the Philippines (7.6%).

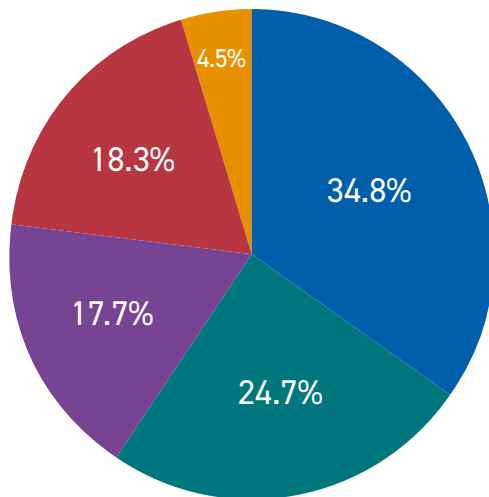
### Q1 What is your nationality?



# AFFILIATION

The largest affiliation group this year came from Academia, Think-Tanks, or Research Institutions (34.8%), followed by ASEAN's private sector (Business of Finance) (24.7%), and Civil Society, Non-Government Organisations, or Media (18.3%).

Government was presented by 17.7% of respondents. The smallest representation came from respondents affiliated with Regional or International Organisations (4.5%).



- Academia, Think-Tanks, or Research Institutions
- Business or Finance
- Government
- Civil Society, Non-Government Organisations, or Media
- Regional or International Organisations

## Q2 What is your affiliation?

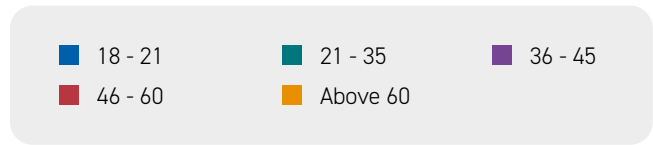
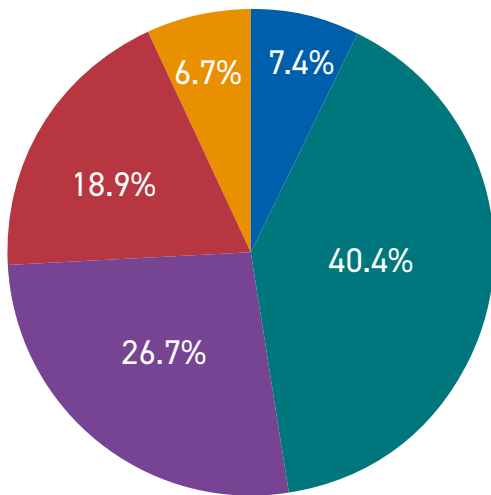
Country	Academia, Think-Tanks, or Research Institutions	Business or Finance	Government	Civil Society, Non-Government Organisations, or Media	Regional or International Organisations
ASEAN	34.8%	24.7%	17.7%	18.3%	4.5%
Brunei	42.5%	7.5%	25.0%	25.0%	0.0%
Cambodia	24.6%	41.8%	14.9%	15.7%	3.0%
Indonesia	46.3%	14.0%	7.4%	29.8%	2.5%
Laos	32.7%	19.6%	16.8%	22.4%	8.4%
Malaysia	41.1%	28.2%	11.3%	14.5%	4.8%
Myanmar	32.2%	28.7%	26.1%	13.0%	0.0%
Philippines	32.3%	19.2%	23.2%	20.2%	5.1%
Singapore	32.2%	24.5%	14.4%	21.2%	7.7%
Thailand	33.3%	27.8%	22.2%	7.6%	9.0%
Vietnam	30.9%	36.0%	15.4%	13.2%	4.4%



# AGE

In terms of age distribution, the largest age group remained the 21-35 years old (40.4%). This is followed by the 36-45 years old group (26.7%). These two groups are the most economically productive and well-informed age groups in Southeast Asia. The

third largest group is aged between 46-60 years old (18.9%), followed by those aged between 18-21 years old (7.4%) and lastly, those above 60 years old (6.7%).



## Q3 Which age group do you belong to?

Country	18 - 21	21 - 35	36 - 45	46 - 60	Above 60
ASEAN	7.4%	40.4%	26.7%	18.9%	6.7%
Brunei	5.0%	47.5%	35.8%	11.7%	0.0%
Cambodia	14.9%	41.0%	23.9%	18.7%	1.5%
Indonesia	5.8%	44.6%	25.6%	19.0%	5.0%
Laos	20.6%	37.4%	26.2%	15.0%	0.9%
Malaysia	4.8%	41.1%	16.1%	27.4%	10.5%
Myanmar	3.5%	30.4%	43.5%	20.0%	2.6%
Philippines	7.1%	50.5%	14.1%	17.2%	11.1%
Singapore	1.9%	27.9%	21.6%	26.9%	21.6%
Thailand	2.8%	36.1%	33.3%	19.4%	8.3%
Vietnam	7.4%	47.1%	26.5%	14.0%	5.1%

## SECTION II Regional Outlook and Views on International Developments

This section examines the key challenges and main preoccupations of the region of the preceding year. **Weighting is applied from this section onwards in order to provide trend analysis.**

### TOP THREE CHALLENGES FACING SOUTHEAST ASIA

Nearly three years after the start of the global pandemic, the region began emerging from COVID-19's shadow around the middle of 2022. Starting with Cambodia's early lifting of restrictions in March 2022, almost all the countries in the region opened their borders to trade and travel by July 2022. By this time, public health concerns had eased with regional governments choosing to live endemically with COVID-19.

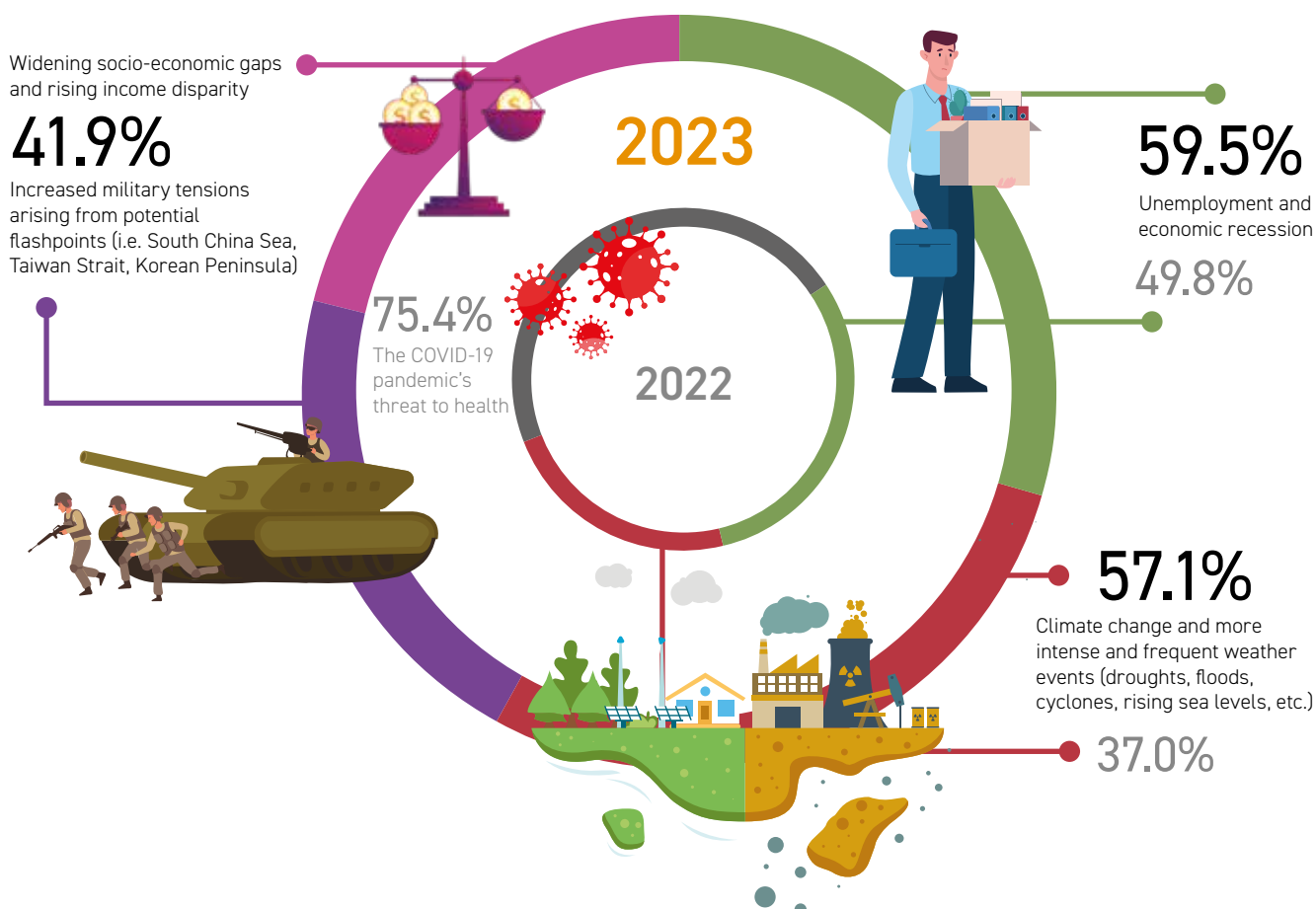
Majority of Southeast Asians (59.5%) fear unemployment and economic recession coming out of the pandemic last year. Major geopolitical and economic developments such as the invasion of Ukraine by Russia which sparked an increase in energy and food prices meant that a fast recovery was not possible. A cost-of-living crisis preoccupied much of the public's minds as commodities crunch and inflationary pressures reared their ugly heads. Unemployment and recessionary concerns are particularly elevated in Indonesia at 70.2%, Cambodia at 69.4% and Malaysia at 63.7%.

57.1% of Southeast Asians say that more frequent and intense weather events is the region's second biggest challenge. 76.8% of Philippine respondents say that climate change is their biggest threat, overtaking unemployment and recession, as the

pain of destruction is felt most acutely from Typhoon Nalgae at the end of October 2022. Besides the Philippines, climate change is also the city-state Singapore's top challenge at 60.1%. Brunei and Vietnam express similarly strong worries about the climate threat at 74.2% and 64.7% respectively. Climate change is also Malaysia's and Indonesia's second-ranked challenge at 61.3% and 60.3% respectively.

Widening socio-economic gaps and rising income disparity and increased military tensions from potential flashpoints tie at third place (41.9%) on the list of top regional challenges. This is perhaps reflective of the rapidly changing geopolitical and economic environment that is felt across the world, not just in Southeast Asia. According to *The Sustainable Development Goals Report 2022*, income inequality within countries have increased by about one per cent on average, in emerging market and developing countries, reversing the gains made at the beginning of this millennium.

At the country level, Brunei and Vietnam feel most acutely about the security threats arising from potential conflict over flashpoints such as the South China Sea, Taiwan Strait and the Korean Peninsula.



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

2022								
Country	Deteriorating human rights conditions	Domestic political instability	Increased military tensions arising from potential flashpoints	Climate change and more intense and frequent weather events	Terrorism	The COVID-19 pandemic's threat to health	Unemployment and economic recession	Widening socio-economic gaps and rising income disparity
ASEAN	22.6%	34.3%	35.6%	37.0%	12.5%	75.4%	49.8%	32.8%
Brunei	11.3%	18.9%	35.8%	50.9%	1.9%	81.1%	58.5%	41.5%
Cambodia	14.8%	42.0%	42.0%	23.5%	11.1%	80.2%	51.9%	34.6%
Indonesia	20.6%	35.9%	29.8%	49.6%	7.6%	67.9%	51.9%	36.6%
Laos	18.2%	18.2%	6.8%	29.5%	6.8%	88.6%	77.3%	54.5%
Malaysia	20.0%	50.4%	28.9%	26.7%	11.1%	78.5%	57.8%	26.7%
Myanmar	76.6%	58.0%	33.7%	9.4%	35.1%	58.3%	22.0%	6.9%
Philippines	10.3%	17.8%	51.2%	52.0%	24.5%	84.0%	37.8%	22.5%
Singapore	19.8%	40.1%	46.4%	45.5%	7.7%	69.4%	29.3%	41.9%
Thailand	20.5%	43.6%	31.6%	29.1%	12.0%	75.2%	51.3%	36.8%
Vietnam	13.9%	18.1%	49.3%	53.5%	7.6%	70.8%	60.4%	26.4%

2023								
Country	Deteriorating human rights conditions	Domestic political instability	Increased military tensions arising from potential flashpoints	Climate change and more intense and frequent weather events	Terrorism	US-China decoupling	Unemployment and economic recession	Widening socio-economic gaps and rising income disparity
ASEAN	16.5%	35.6%	41.9%	57.1%	11.3%	36.2%	59.5%	41.9%
Brunei	8.3%	33.3%	75.0%	74.2%	10.8%	23.3%	49.2%	25.8%
Cambodia	20.9%	14.9%	41.1%	52.2%	0.7%	38.8%	69.4%	61.9%
Indonesia	17.4%	38.0%	31.4%	60.3%	15.7%	30.6%	70.2%	36.4%
Laos	23.4%	47.7%	38.3%	50.5%	11.2%	47.7%	61.7%	19.6%
Malaysia	10.5%	50.8%	26.0%	61.3%	4.8%	35.5%	63.7%	47.6%
Myanmar	32.2%	51.3%	18.3%	29.6%	41.7%	20.9%	59.1%	47.0%
Philippines	16.2%	20.2%	50.5%	76.8%	12.1%	25.3%	60.6%	38.4%
Singapore	5.8%	31.7%	45.2%	60.1%	4.8%	58.2%	45.2%	49.0%
Thailand	23.6%	37.5%	28.0%	41.7%	9.7%	38.2%	62.5%	59.0%
Vietnam	6.6%	30.1%	64.7%	64.7%	1.5%	44.1%	53.7%	34.6%

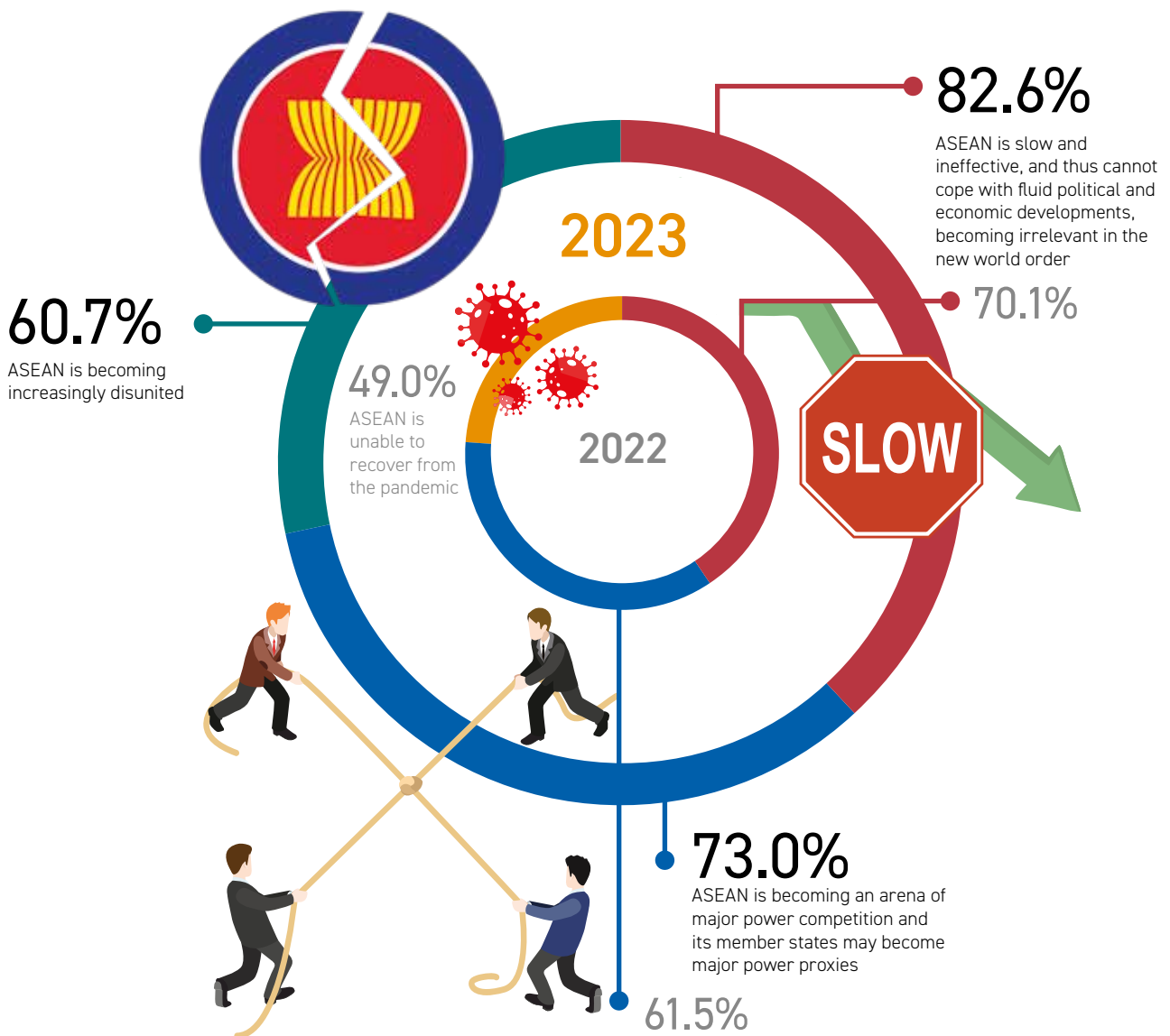
# TOP THREE CONCERNS ABOUT ASEAN

Southeast Asians continue to express their disappointment with the effectiveness of the region's top organisation - ASEAN. 82.6% of Southeast Asians say that the regional organisation is "slow and ineffective, and thus cannot cope with fluid political and economic developments", a drastic 12.5 percentage point jump from 70.1% in 2022. The sense that ASEAN is simply reactive to external developments, unable to effect change, and becoming irrelevant in the new world order is felt strongest by Vietnam at 93.4% and Singapore at 89.9%. Of the group, Laos is least critical at 70.1% although this remains the top concern for Laos.

The second-ranked challenge is the danger of ASEAN becoming an arena of major power competition and the fear that its member states may become major power proxies as expressed by 73.0% of respondents. For Cambodia, this concern ranks at

the top at 84.3% ahead of concerns of ASEAN being slow and ineffective. This concern may be directly related to external pressures felt by Cambodia as ASEAN Chair in 2022.

The sense that ASEAN is becoming increasingly disunited is shared by nearly two-thirds of respondents (60.7%). This may be related to a few issues that tested ASEAN unity. First, ASEAN countries adopted different country positions on the invasion of Ukraine by Russia in February 2022. This is evident in the different country voting positions at the UN and the absence of a strong regional response. Second, ASEAN's lack of unified response to the Myanmar crisis that started with the 2021 coup has not gone unnoticed by observers. Myanmar (72.2%) and Singapore (70.2%) gave the worst marks on ASEAN's unity scorecard.



## Q5 What are your top 3 concerns about ASEAN? (check 3 responses)

2022					
Country	ASEAN is becoming an arena of major power competition and its member states may become major power proxies	ASEAN is becoming increasingly disunited	ASEAN is elitist and disconnected from ordinary people	ASEAN is slow and ineffective, and thus cannot cope with fluid political and economic developments	ASEAN is unable to overcome current pandemic challenges
ASEAN	61.5%	48.2%	39.0%	70.1%	49.0%
Brunei	60.4%	52.8%	39.6%	71.7%	45.3%
Cambodia	56.8%	64.2%	37.0%	51.9%	46.9%
Indonesia	64.9%	45.8%	45.8%	64.9%	48.1%
Laos	79.5%	27.3%	22.7%	70.5%	79.5%
Malaysia	54.8%	41.5%	45.9%	71.1%	58.5%
Myanmar	33.1%	33.7%	61.1%	90.6%	40.0%
Philippines	65.5%	52.5%	26.8%	74.3%	56.5%
Singapore	67.6%	60.4%	27.5%	79.7%	35.6%
Thailand	59.8%	47.9%	51.3%	65.8%	38.5%
Vietnam	72.9%	55.6%	31.9%	61.1%	41.0%

2023					
Country	ASEAN is becoming an arena of major power competition and its member states may become major power proxies	ASEAN is becoming increasingly disunited	ASEAN is elitist and disconnected from ordinary people	ASEAN is slow and ineffective, and thus cannot cope with fluid political and economic developments, becoming irrelevant in the new world order	ASEAN is unable to recover from the pandemic
ASEAN	73.0%	60.7%	46.6%	82.6%	37.2%
Brunei	80.0%	42.5%	37.5%	88.3%	51.7%
Cambodia	84.3%	59.7%	44.8%	70.9%	40.3%
Indonesia	73.6%	54.5%	59.5%	86.8%	25.6%
Laos	40.2%	63.6%	66.4%	70.1%	59.8%
Malaysia	72.6%	60.5%	53.2%	80.6%	33.1%
Myanmar	55.7%	72.2%	59.1%	77.4%	35.7%
Philippines	76.8%	57.6%	39.4%	84.8%	41.4%
Singapore	83.2%	70.2%	31.7%	89.9%	25.0%
Thailand	72.9%	56.9%	51.4%	84.0%	34.7%
Vietnam	90.4%	69.1%	22.8%	93.4%	24.3%

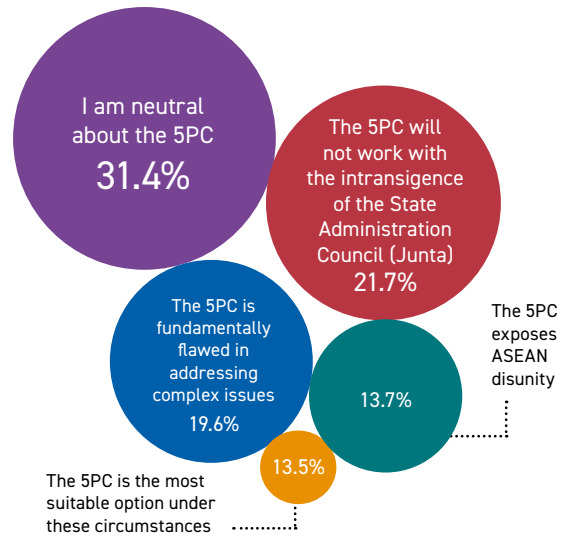
# ASEAN'S FIVE-POINT CONSENSUS (5PC) ON MYANMAR

Two years since the coup of 1 February 2021, Myanmar remains in a state of paralysis. ASEAN respondents appear to hold mixed views about the problem. When asked which statement best described their views about ASEAN's Five-Point Consensus (5PC) – ASEAN's guiding response to bring about peace and reconciliation in Myanmar – a third of respondents (31.4%) say they are neutral about the 5PC. Laos (61.7%), Cambodia (56.0%) and Brunei (48.3%) are among the most agnostic ASEAN member states concerning ASEAN's approach to resolve Myanmar's problems. The latter two were ASEAN Chairs in the past two years and had appointed Special Envoys to address the issue. Laos will take over ASEAN Chair position in 2024.

Among those who are of the view that the 5PC will not work because of the intransigence of the junta, Singapore respondents express the strongest view at 41.8%, double the regional average of 21.7%. Conversely, only 8.4% of Lao respondents think that the junta's intransigence is a problem.

It is also not surprising that another point of view – that the design of the 5PC as "fundamentally flawed in addressing complex issues" – is ranked third by 19.6% of regional respondents. This view forms Myanmar respondents' top choice

at 35.7% whereas only 4.5% of Cambodia respondents viewed this way. As ASEAN Chair last year, Cambodia respondents are either mostly neutral about the 5PC at 56.0% or think that it is the "most suitable option under these circumstances" at 26.9%.



## Q6 Choose the statement that best reflects your view about ASEAN's Five-Point Consensus (5PC) on Myanmar:

Country	The 5PC is fundamentally flawed in addressing complex issues	The 5PC exposes ASEAN disunity	I am neutral about the 5PC	The 5PC will not work with the intransigence of the State Administration Council (Junta)	The 5PC is the most suitable option under these circumstances
ASEAN	19.6%	13.7%	31.4%	21.7%	13.5%
Brunei	11.7%	10.8%	48.3%	17.5%	11.7%
Cambodia	4.5%	3.0%	56.0%	9.7%	26.9%
Indonesia	24.0%	6.6%	23.1%	28.1%	18.2%
Laos	11.2%	10.3%	61.7%	8.4%	8.4%
Malaysia	16.9%	16.1%	29.0%	26.6%	11.3%
Myanmar	35.7%	29.6%	8.7%	16.5%	9.6%
Philippines	22.2%	11.1%	28.3%	23.2%	15.2%
Singapore	14.4%	8.7%	24.0%	41.8%	11.1%
Thailand	27.1%	23.6%	16.7%	26.4%	6.3%
Vietnam	28.7%	17.6%	18.4%	18.4%	16.9%

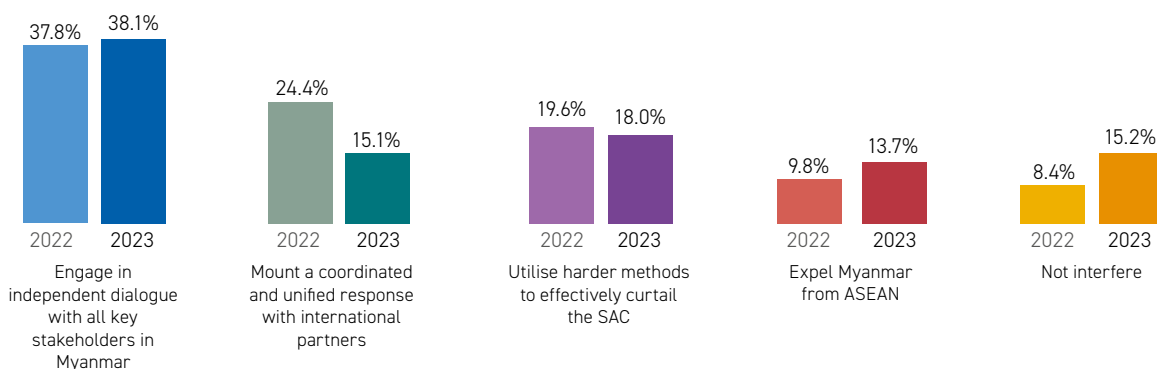
# MOVING THE MYANMAR ISSUE FORWARD

Slightly more than a third of regional respondents (38.1%) want to see ASEAN engage in independent dialogue with all key stakeholders, including with the shadow National Unity Government, to build trust. This is a small 0.3% increase from 37.8% of respondents who chose this option as their top choice last year.

Another 18.0% of respondents want to see ASEAN utilise harder methods such as suspension and targeted sanctions to increase the costs of non-compliance for the junta. Among this group of respondents, Indonesia respondents express the strongest view at 24.0% whereas only 1.9% of Lao respondents would choose punitive actions.

15.2% of regional respondents, compared to just 8.4% last year, want to stay out of Myanmar's domestic politics. This option is tied at third place with a desire to see greater coordinated international action. It is noteworthy that 47.0% of Cambodia and 43.0% of Lao respondents prefer the non-interference option as their top choice in moving the Myanmar issue forward.

The percentage of respondents who express confidence in seeing a coordinated and unified response with international partners fell nearly a ten-percentage point from 24.4% in 2022 to 15.1% in 2023. The inability of the UN to pass any meaningful resolution on the situation in Myanmar strengthened this view.



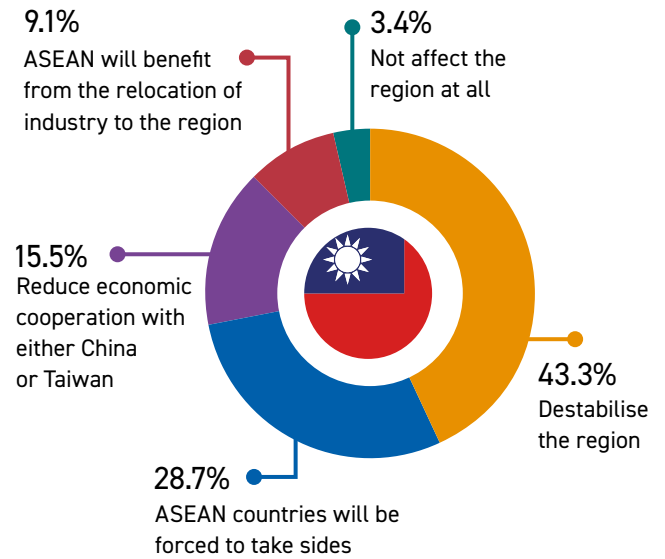
## Q7 To move the Myanmar issue forward, ASEAN should:

Country	Engage in independent dialogue with all key stakeholders, including the National Unity Government, in Myanmar to build trust		Mount a coordinated and unified response with international partners		Utilise harder methods to effectively curtail the SAC		Expel Myanmar from ASEAN		Not interfere	
	2022	2023	2022	2023	2022	2023	2022	2023	2022	2023
ASEAN	37.8%	38.1%	24.4%	15.1%	19.6%	18.0%	9.8%	13.7%	8.4%	15.2%
Brunei	50.9%	34.2%	24.5%	15.0%	15.1%	23.3%	5.7%	22.5%	3.8%	5.0%
Cambodia	43.2%	17.2%	21.0%	9.0%	16.0%	13.4%	4.9%	13.4%	14.8%	47.0%
Indonesia	42.7%	50.4%	24.4%	12.4%	22.1%	24.0%	6.9%	9.9%	3.8%	3.3%
Laos	36.4%	40.2%	31.8%	12.1%	2.3%	1.9%	6.8%	2.8%	22.7%	43.0%
Malaysia	34.8%	41.1%	15.6%	15.3%	19.3%	20.2%	16.3%	16.1%	14.1%	7.3%
Myanmar	22.0%	36.5%	9.1%	18.3%	43.4%	15.7%	21.4%	7.8%	4.0%	21.7%
Philippines	38.8%	41.4%	38.5%	18.2%	11.5%	21.2%	4.5%	15.2%	6.8%	4.0%
Singapore	33.3%	34.6%	23.9%	19.7%	23.9%	20.2%	14.4%	18.8%	4.5%	6.7%
Thailand	39.3%	34.7%	26.5%	18.1%	21.4%	21.5%	10.3%	20.1%	2.6%	5.6%
Vietnam	36.8%	50.7%	28.5%	12.5%	20.8%	18.4%	6.9%	10.3%	6.9%	8.1%

# THE OUTBREAK OF HOSTILITIES IN TAIWAN STRAIT

Southeast Asians do not believe that the region will remain unscathed in the event of a conflict over Taiwan. 43.3% believe that such an event will destabilise the region. Another 28.7% fear that ASEAN countries will be forced to take sides. A small percentage of 15.5% believe that economic cooperation with either China or Taiwan will be affected while an even smaller proportion of 9.1% think that ASEAN may benefit from the relocation of industries to Southeast Asia. The largest group of deniers who think that such an event will have no effect on Southeast Asia at all come from Laos (8.4%) whereas there are no deniers in Vietnam (0.0%).

At the country level, it is interesting that largest group of Brunei respondents (39.2%) are more concerned with the reduction of economic cooperation with China and Taiwan whereas Myanmar (45.2%) and Thailand (41.7%) were more concerned with being forced to take sides. Of those who think that ASEAN might benefit from an outbreak of hostilities, Brunei topped the charts at 23.3%. The other seven ASEAN countries believe that regional instability is the worst consequence for Southeast Asia.



## Q8 How will the outbreak of hostilities in the Taiwan Strait affect the region? (choose the most important option)

Country	Destabilise the region	ASEAN countries will be forced to take sides	Reduce economic cooperation with either China or Taiwan	ASEAN will benefit from the relocation of industry to the region	Not affect the region at all
ASEAN	43.3%	28.7%	15.5%	9.1%	3.4%
Brunei	10.8%	23.3%	39.2%	23.3%	3.3%
Cambodia	68.7%	14.2%	6.0%	8.2%	3.0%
Indonesia	43.0%	24.8%	23.1%	6.6%	2.5%
Laos	42.1%	28.0%	15.9%	5.6%	8.4%
Malaysia	39.5%	29.8%	16.1%	8.9%	5.6%
Myanmar	42.6%	45.2%	3.5%	3.5%	5.2%
Philippines	39.4%	30.3%	20.2%	8.1%	2.0%
Singapore	47.1%	32.2%	12.5%	6.7%	1.4%
Thailand	38.9%	41.7%	9.0%	8.3%	2.1%
Vietnam	61.0%	17.6%	9.6%	11.8%	0.0%

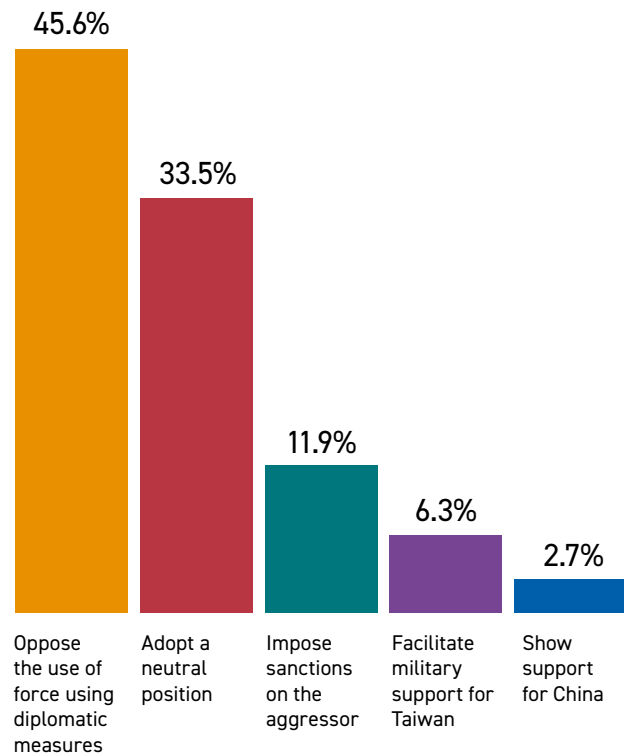


# RESPONSE TOWARDS CONFLICT IN TAIWAN STRAIT

In another hypothetical question on possible responses that their countries can take in the event of hostilities, the largest group of Southeast Asians (45.6%) believe that their governments should oppose the use of force using diplomatic measures. Seven ASEAN countries, with the exception of Brunei, Cambodia and Laos, choose this as their top option. Of this group, 66.1% of Indonesia respondents expressed the strongest support for an active diplomatic approach followed by 61.0% of Vietnam and 58.2% of Singapore respondents.

A third of respondents (33.5%) feel that maintaining a neutral position is important. Brunei (52.5%), Cambodia (56.0%) and Laos (59.8%) prefer a neutral position over taking diplomatic measures. There is little appetite in the region for imposing sanctions on the aggressor (11.9%), facilitating military support for Taiwan (6.3%) or showing support for China (2.7%).

Interestingly, showing support for China is not an option for Indonesia, Philippine or Vietnam respondents at all. On the other hand, 20.2% of Philippine respondents will support facilitating military support for Taiwan. A conflict over the Taiwan Strait carries the most immediate and serious consequences on the Philippines just by geographical proximity alone. It is also the most likely US ally in the region to be asked to facilitate support for US forces.



## Q9 What should your country do if conflict breaks out in the Taiwan Strait? (choose one option)

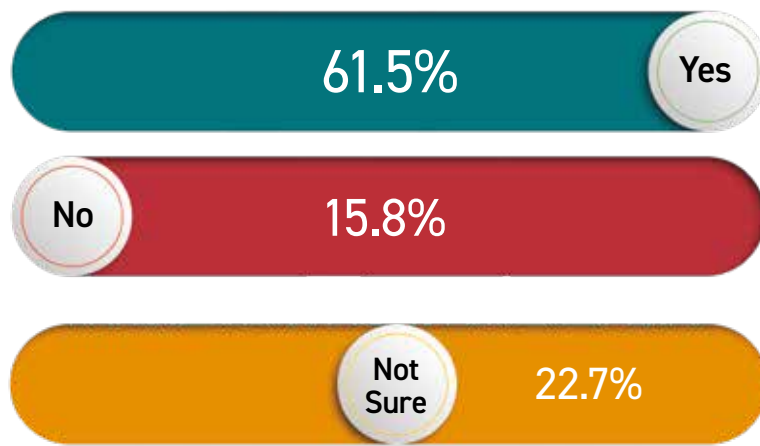
Country	Oppose the use of force using diplomatic measures	Impose sanctions on the aggressor	Facilitate military support for Taiwan	Adopt a neutral position	Show support for China
ASEAN	45.6%	11.9%	6.3%	33.5%	2.7%
Brunei	21.7%	12.5%	12.5%	52.5%	0.8%
Cambodia	23.1%	9.0%	3.0%	56.0%	9.0%
Indonesia	66.1%	9.1%	2.5%	22.3%	0.0%
Laos	15.9%	12.1%	5.6%	59.8%	6.5%
Malaysia	52.4%	12.1%	4.0%	29.0%	2.4%
Myanmar	54.8%	18.3%	4.3%	19.1%	3.5%
Philippines	54.5%	12.1%	20.2%	13.1%	0.0%
Singapore	58.2%	11.1%	2.9%	24.0%	3.8%
Thailand	48.6%	14.6%	4.2%	31.9%	0.7%
Vietnam	61.0%	8.1%	3.7%	27.2%	0.0%

# TIMOR-LESTE'S ADMISSION INTO ASEAN

ASEAN gave in-principle approval for Timor-Leste to join as its 11<sup>th</sup> member at the 40<sup>th</sup> and 41<sup>st</sup> ASEAN Summits that concluded in mid-November 2022.

Overwhelmingly, 61.5% of ASEAN respondents support Timor-Leste's membership. The strongest expression of support came from Cambodia at 93.3% and the Philippines at 69.7%. 67.8% from Indonesia supported their closest neighbour while nearly a quarter of Indonesia respondents (24.8%) were unsure over admitting Timor-Leste as a new member.

The strongest opposition is from Myanmar at 48.7% followed by Brunei at 45.0% whereas Laos is most unsure of a new member joining at 38.3%. Although 26.4% of Singapore respondents remain unsure, only 11.1% expressed outright opposition. The lack of ASEAN consensus over Timor-Leste's application to join ASEAN has been frequently attributed to Singapore in the past.



## Q10 Should Timor-Leste join ASEAN?

Country	Yes	No	Not sure
ASEAN	61.5%	15.8%	22.7%
Brunei	48.3%	45.0%	6.7%
Cambodia	93.3%	1.5%	5.2%
Indonesia	67.8%	7.4%	24.8%
Laos	53.3%	8.4%	38.3%
Malaysia	61.3%	10.5%	28.2%
Myanmar	27.8%	48.7%	23.5%
Philippines	69.7%	10.1%	20.2%
Singapore	62.5%	11.1%	26.4%
Thailand	64.6%	6.3%	29.2%
Vietnam	66.2%	9.6%	24.3%

# IMPACTS OF TIMOR-LESTE'S ADMISSION INTO ASEAN

Of the respondents who are supportive of Timor-Leste's admission, 48.7% say that a new member will enhance ASEAN's unity and centrality. Another 39.9% are confident that Timor-Leste's membership will increase intra-regional trade and investment. Only 11.4% are of the view that nothing will change in ASEAN. Majority of Vietnam respondents (70.0%) are optimistic that Timor-Leste's membership will enhance ASEAN unity and centrality, much higher than the ASEAN average of 48.7%.

Of those who oppose Timor-Leste's admission, one third (34.4%) are of the view that ASEAN's economic integration will slow down because of Timor-Leste whereas another 29.8% say that nothing will change in ASEAN, followed closely behind by 28.8% who believe that ASEAN's consensus-based decision-making process will be complicated by Timor-Leste's membership. Only 7.0% believe that such a move will increase disunity among member states. 66.7% of Indonesia respondents in this category are of the view that a slowdown in economic integration will take place.

## Q11 In my opinion, the admission of Timor-Leste will:

Country	Enhance ASEAN's unity and centrality	Increase intra-regional trade and investment	Not change anything in ASEAN
ASEAN	48.7%	39.9%	11.4%
Brunei	46.6%	43.1%	10.3%
Cambodia	55.2%	37.6%	7.2%
Indonesia	56.1%	28.0%	15.9%
Laos	45.6%	49.1%	5.3%
Malaysia	40.8%	44.7%	14.5%
Myanmar	34.4%	53.1%	12.5%
Philippines	50.7%	42.0%	7.2%
Singapore	42.3%	36.9%	20.8%
Thailand	45.2%	41.9%	12.9%
Vietnam	70.0%	22.2%	7.8%

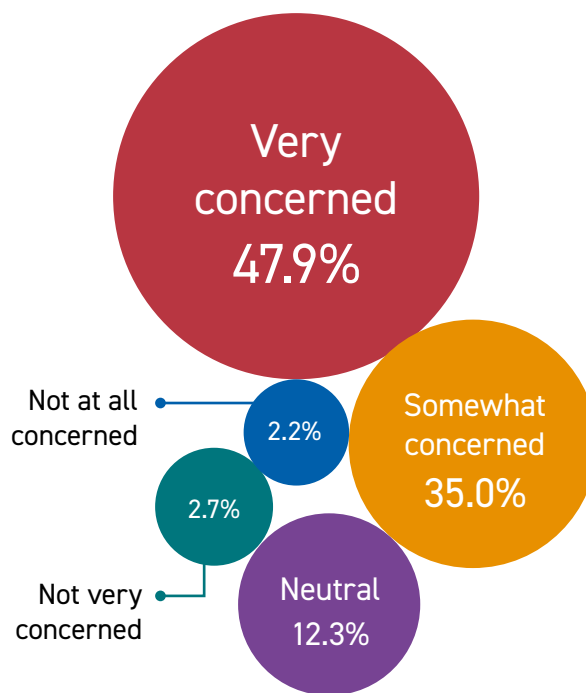
Country	Not change anything in ASEAN	Slow down ASEAN's economic integration	Complicate the consensus-based decision-making process	Increase disunity among ASEAN member states
ASEAN	29.8%	34.4%	28.8%	7.0%
Brunei	66.7%	14.8%	16.7%	1.9%
Cambodia	0.0%	50.0%	50.0%	0.0%
Indonesia	11.1%	66.7%	22.2%	0.0%
Laos	88.9%	11.1%	0.0%	0.0%
Malaysia	15.4%	46.2%	38.5%	0.0%
Myanmar	41.1%	44.6%	7.1%	7.1%
Philippines	40.0%	20.0%	40.0%	0.0%
Singapore	8.7%	30.4%	30.4%	30.4%
Thailand	11.1%	44.4%	44.4%	0.0%
Vietnam	15.4%	15.4%	38.5%	30.8%

# RUSSIA'S INVASION OF UKRAINE

Despite a tepid reaction from ASEAN to Russia's invasion of Ukraine, respondents in the region realised how serious an unprovoked military event was, even if it was a continent away.

Nearly half of the regional respondents (47.9%) say that they are "very concerned" about Russia's invasion of Ukraine and another 35.0% saying that they are "somewhat concerned". Majority (53.6%) of those who say that they are "very concerned" are respondents with civil society, NGO and media affiliations as compared to other affiliations. This may be a reflection of the more internationalist leanings of this affiliation group.

A small percentage (12.3%) remain "neutral" with even smaller minorities saying they are "not very concerned" (2.7%) or "not at all concerned" (2.2%). At the country level, the Philippines express the greatest concern with 71.7% saying that they are "very concerned" followed by Brunei at 64.2% and Indonesia at 61.2%. Lao respondents form the largest group of those who are neutral at 36.4% with only 14.0% saying they were "very concerned".

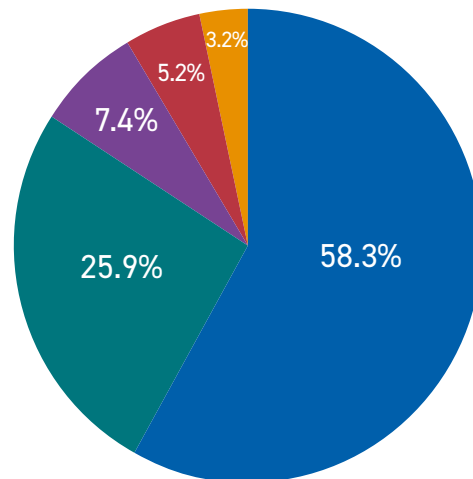


## Q12 How concerned are you about Russia's invasion of Ukraine?

Country	Very concerned	Somewhat concerned	Neutral	Not very concerned	Not at all concerned
ASEAN	47.9%	35.0%	12.3%	2.7%	2.2%
Brunei	64.2%	16.7%	7.5%	4.2%	7.5%
Cambodia	52.2%	28.4%	15.7%	1.5%	2.2%
Indonesia	61.2%	28.1%	6.6%	2.5%	1.7%
Laos	14.0%	44.9%	36.4%	3.7%	0.9%
Malaysia	41.9%	37.9%	16.9%	2.4%	0.8%
Myanmar	27.0%	51.3%	13.9%	1.7%	6.1%
Philippines	71.7%	22.2%	4.0%	2.0%	0.0%
Singapore	51.9%	35.6%	7.7%	3.8%	1.0%
Thailand	38.2%	50.7%	6.9%	3.5%	0.7%
Vietnam	56.6%	33.8%	7.4%	1.5%	0.7%

# IMPACTS OF RUSSIA'S INVASION OF UKRAINE ON SOUTHEAST ASIA

58.3% of Southeast Asians feel that the most serious impact of Russia's invasion of Ukraine is in the increase in energy and food prices. Overwhelmingly, 73.6% of Indonesians feel this way due to the country's dependence on food grain and fertiliser imports from Ukraine and Russia. Majority of the Philippine respondents (70.7%) feel equally vulnerable to this impact followed by Thailand at 65.3%. These economies are highly dependent on commodity imports from both countries involved in the conflict. The disruption of Ukrainian wheat supplies to the region was widely reported as was the disruption of fertiliser supplies from Russia last year. Indonesian President Joko Widodo's visit to Russia to push for an opening of the Black Sea route and subsequently his efforts at the G20 certainly put the spotlight on the commodities crunch faced by many Indonesians.



Beyond these bread-and-butter issues, what stands out in particular is the level of importance put on a possible erosion of trust in the rules-based order. Though equally impacted by food and energy prices, 40.9% of Singapore respondents say that erosion of trust is the second most serious impact of the invasion. This is followed by 32.4% of Vietnam respondents who think the same way. Interestingly nearly a quarter of Brunei respondents think that an erosion of trust is less of an issue than the fear that an invasion can worsen existing divisions within ASEAN. For 9.7% of Malaysia respondents, the third ranked impact is the possibility of worsening tensions between China and the US.

## Q13 What is the most serious impact of Russia's invasion of Ukraine on Southeast Asia?

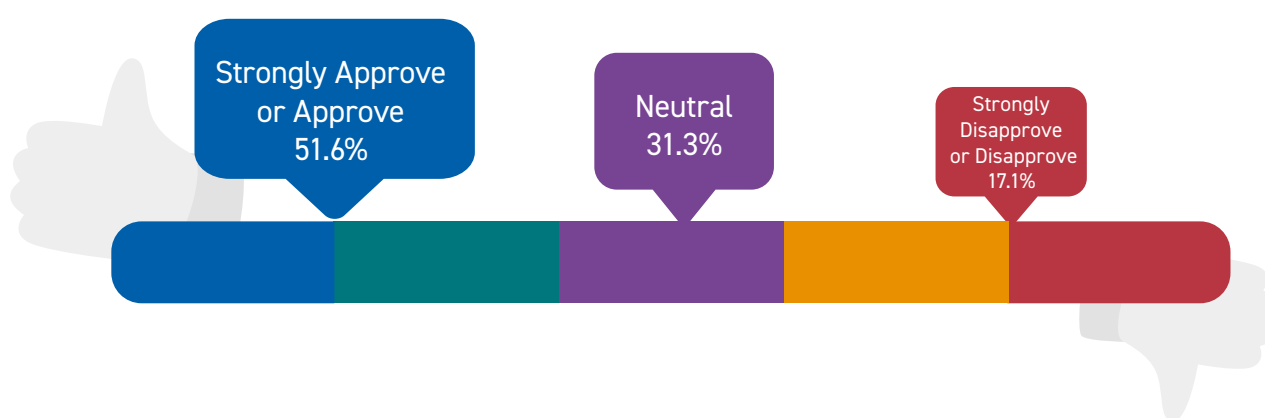
Country	Increases energy and food prices causing economic hardship	Erodes trust in a rules-based order and violation of national sovereignty	Increases existing divisions within ASEAN	Worsen tensions between US and China	Does not affect Southeast Asia
ASEAN	58.3%	25.9%	7.4%	5.2%	3.2%
Brunei	38.3%	19.2%	24.2%	9.2%	9.2%
Cambodia	61.2%	27.6%	3.0%	5.2%	3.0%
Indonesia	73.6%	20.7%	0.8%	4.1%	0.8%
Laos	52.3%	31.8%	8.4%	1.9%	5.6%
Malaysia	62.1%	16.9%	9.7%	9.7%	1.6%
Myanmar	52.2%	28.7%	9.6%	2.6%	7.0%
Philippines	70.7%	23.2%	4.0%	1.0%	1.0%
Singapore	48.6%	40.9%	3.4%	5.8%	1.4%
Thailand	65.3%	17.4%	7.6%	8.3%	1.4%
Vietnam	58.8%	32.4%	2.9%	4.4%	1.5%

# APPROVAL OF GOVERNMENT'S RESPONSE TO RUSSIA'S INVASION OF UKRAINE

Across the region, 51.6% of Southeast Asians either "approve" or "strongly approve" of their government's response to the Russian invasion.

Among countries, the highest level of approvals come from 90.3% of Cambodia respondents for their government's response whereas Thai respondents give their government the lowest approval levels at merely 26.4%. The Singapore government also enjoyed support from 68.3% of respondents who say that they either "approve" or "strongly approve" of the response. Singapore is the only country in the region to impose limited sanctions on Russia.

The converse is true where the Thai government received the highest disapproval ratings from 45.2% of respondents. Majority of Lao respondents (52.3%) don't care one way or another about their government's response. Similarly, the biggest proportion of Malaysia respondents (48.4%) are neutral about their government's response.



## Q14 Do you approve of your government's response to Russia's invasion of Ukraine?

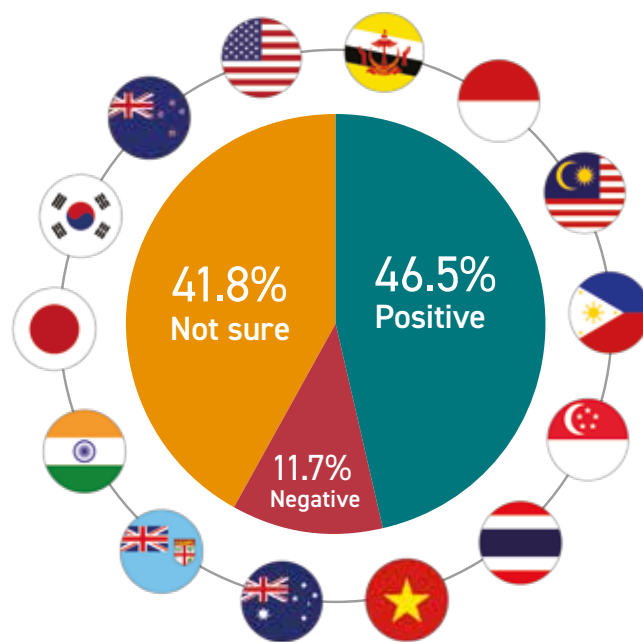
Country	Strongly Approve	Approve	Neutral	Disapprove	Strongly Disapprove
ASEAN	17.8%	33.8%	31.3%	11.1%	6.0%
Brunei	11.7%	55.0%	21.7%	6.7%	5.0%
Cambodia	70.9%	19.4%	9.0%	0.7%	0.0%
Indonesia	12.4%	38.8%	31.4%	12.4%	5.0%
Laos	3.7%	30.8%	52.3%	11.2%	1.9%
Malaysia	9.7%	29.8%	48.4%	8.1%	4.0%
Myanmar	10.4%	46.1%	23.5%	8.7%	11.3%
Philippines	17.2%	25.3%	38.4%	13.1%	6.1%
Singapore	32.7%	35.6%	23.6%	6.3%	1.9%
Thailand	4.2%	22.2%	28.5%	26.4%	18.8%
Vietnam	5.1%	35.3%	36.0%	17.6%	5.9%

# VIEWS ON THE US-LED INDO-PACIFIC ECONOMIC FRAMEWORK FOR PROSPERITY (IPEF)

In May 2022, the United States launched the Indo-Pacific Economic Framework for Prosperity (IPEF) with 14 countries, including seven ASEAN members (Brunei, Indonesia, Malaysia, the Philippines, Singapore, Thailand, and Vietnam) and six other countries, namely Australia, Fiji, India, Japan, the Republic of Korea, and New Zealand. The IPEF aims to promote resilience, sustainability, inclusiveness, economic growth, fairness, and competitiveness for partner economies.

46.5% of Southeast Asians view the IPEF favourably for their countries while 11.7% of respondents perceive it negatively. The remaining 41.8% of respondents are not sure about the impact of IPEF.

Among ASEAN-IPEF countries, the perceived positive impact of IPEF is largest in Brunei (68.3%), followed by the Philippines (58.6%) and Vietnam (55.9%). It is moderate in Thailand (41.7%) and Malaysia (40.3%), and relatively low in Singapore (37.5%) and Indonesia (34.7%). In contrast, the perceived negative impact of IPEF is largest in Singapore (16.8%), followed by Malaysia (15.3%), and Indonesia (13.2%). Its negative impact is of less concern for Vietnam, the Philippines, and Brunei.



## Q15 The overall impact and effectiveness of the US-led Indo-Pacific Economic Framework for Prosperity (IPEF) is likely to be:

Country	Positive	Negative	Not sure
<b>ASEAN</b>	<b>46.5%</b>	<b>11.7%</b>	<b>41.8%</b>
Brunei	68.3%	8.3%	23.3%
Cambodia	31.3%	18.7%	50.0%
Indonesia	34.7%	13.2%	52.1%
Laos	35.5%	8.4%	56.1%
Malaysia	40.3%	15.3%	44.4%
Myanmar	60.9%	11.3%	27.8%
Philippines	58.6%	8.1%	33.3%
Singapore	37.5%	16.8%	45.7%
Thailand	41.7%	11.8%	46.5%
Vietnam	55.9%	5.1%	39.0%

# REASONS FOR POSITIVE AND NEGATIVE ATTITUDES TOWARDS IPEF

The top three reasons among Southeast Asian respondents who take a positive attitude towards the IPEF include: US' commitment to be economically engaged in the region (31.3%), complementarity with existing ASEAN initiatives (30.4%), and value-adding to their country's bilateral relations with the US (24.3%). The largest group who think that the IPEF will signal the US' commitment to be economically engaged in the region come from Indonesia (45.2%), Vietnam (43.4%), and Malaysia (42.0%).

Perceptions that the IPEF will complement existing ASEAN initiatives are higher in Brunei, Cambodia (non-IPEF partner), the Philippines, Singapore, and Thailand than the regional average. Respondents in the remaining ASEAN countries perceive less complementary of a role of IPEF for ASEAN initiatives. Interestingly, ASEAN respondents who think that the IPEF will add value to their country's relations with the US are highest in non-IPEF partners such as Laos (36.8%) and Myanmar (47.1%). The role of the IPEF in strengthening global trade governance is perceived to be relatively low, accounting for only 14.1% of ASEAN respondents with positive attitudes towards the IPEF.

The top three reasons among Southeast Asians who hold a negative attitude towards the IPEF include: an increase in the US-China competition (33.9%), lack of market access (28.4%), and acceleration of the US-China decoupling process (24.2%).

Respondents who think that the IPEF will worsen US-China competition are most found in Malaysia (63.2%), the Philippines (50.0%), and Indonesia (43.8%) where they are significantly higher than the ASEAN average.

The perception that the IPEF will not offer market access for their countries is highest among ASEAN-IPEF countries in Thailand (35.3%), followed by Indonesia (31.3%) and Brunei (30.0%). ASEAN respondents who think that the IPEF will hasten the US-China decoupling process are most notable in Vietnam (42.9%), Brunei (40.0%), and Malaysia (26.3%). The negative impact of IPEF on countries' bilateral relations with China is perceived to be low, accounting for only 13.4% of ASEAN respondents with negative attitudes towards the IPEF.

## Q16 I feel that Indo-Pacific Economic Framework for Prosperity (IPEF) is positive because... (choose the most important reason)

596 respondents who chose "positive" in Q15

Country	Positive			
	It will add value to my country's relations with the US	It will complement existing ASEAN initiatives	It will signal US commitment to be economically engaged in the region	It will strengthen global trade governance
ASEAN	24.3%	30.4%	31.3%	14.1%
BN	14.6%	52.4%	24.4%	8.5%
KH	14.3%	42.9%	33.3%	9.5%
ID	19.0%	16.7%	45.2%	19.0%
LA	36.8%	28.9%	18.4%	15.8%
MY	20.0%	30.0%	42.0%	8.0%
MM	47.1%	20.0%	14.3%	18.6%
PH	22.4%	32.8%	24.1%	20.7%
SG	21.8%	30.8%	30.8%	16.7%
TH	23.3%	33.3%	36.7%	6.7%
VN	23.7%	15.8%	43.4%	17.1%

## Q17 I feel that Indo-Pacific Economic Framework for Prosperity (IPEF) is negative because... (choose the most important reason)

159 respondents who chose "negative" in Q15

Country	Negative			
	It will not offer market access for my country	It will worsen US-China competition	It will hasten the US-China decoupling process	It will complicate my country's relations with China
ASEAN	28.4%	33.9%	24.2%	13.4%
BN	30.0%	30.0%	40.0%	0.0%
KH	64.0%	16.0%	12.0%	8.0%
ID	31.3%	43.8%	18.8%	6.3%
LA	33.3%	33.3%	11.1%	22.2%
MY	10.5%	63.2%	26.3%	0.0%
MM	30.8%	30.8%	23.1%	15.4%
PH	0.0%	50.0%	25.0%	25.0%
SG	20.0%	37.1%	25.7%	17.1%
TH	35.3%	35.3%	17.6%	11.8%
VN	28.6%	0.0%	42.9%	28.6%

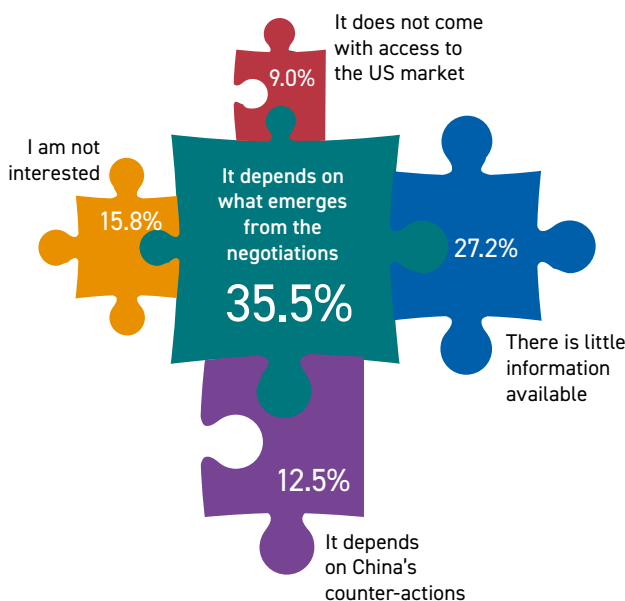


## REASONS FOR UNSURE ATTITUDE TOWARDS IPEF

The top three reasons among Southeast Asian respondents who indicated that they are unsure about the IPEF in the previous question include: uncertainty of future negotiations' outcomes (35.5%), lack of information (27.2%), and disinterest (15.8%).

Respondents who hedge their views on the outcomes of the negotiations are highest in the Philippines (51.5%), Singapore (46.3%), and Thailand (40.3%). The first round of IPEF negotiations on the four IPEF pillars, namely trade, supply chains, clean energy and tax and anti-corruption, was conducted in December 2022 in Brisbane, Australia. The United States Trade Representative (USTR) aims to conclude IPEF negotiations within 18 months.

The proportion of unsure respondents due to lack of information varies across countries, ranging from 17.9% in Brunei to 32.8% in Thailand and 34.0% in Vietnam. Understandably, the 15.8% of ASEAN respondents who are not interested in IPEF are mostly found in the non-IPEF countries of Cambodia, Laos and Myanmar. Other reasons for unsure attitude towards the IPEF include concerns about China's counter-actions to the IPEF and the lack of access to the US market.



## Q18 I am not sure about the Indo-Pacific Economic Framework for Prosperity (IPEF) because...

553 respondents who chose "not sure" in Q15

Country	There is little information available	It depends on what emerges from the negotiations	It depends on China's counter-actions	It does not come with access to the US market	I am not interested
ASEAN	27.2%	35.5%	12.5%	9.0%	15.8%
Brunei	17.9%	28.6%	17.9%	17.9%	17.9%
Cambodia	28.4%	23.9%	6.0%	4.5%	37.3%
Indonesia	25.4%	34.9%	7.9%	14.3%	17.5%
Laos	23.3%	33.3%	11.7%	1.7%	30.0%
Malaysia	30.9%	38.2%	14.5%	12.7%	3.6%
Myanmar	21.9%	21.9%	25.0%	6.3%	25.0%
Philippines	33.3%	51.5%	9.1%	0.0%	6.1%
Singapore	24.2%	46.3%	4.2%	16.8%	8.4%
Thailand	32.8%	40.3%	13.4%	4.5%	9.0%
Vietnam	34.0%	35.8%	15.1%	11.3%	3.8%

## SECTION III: Major Powers' Regional Influence and Leadership

This section focuses on the strategic and economic influence of major powers in the region as well as their leadership credibility on global issues such as free trade and upholding international law.

### MOST INFLUENTIAL ECONOMIC POWER IN SOUTHEAST ASIA

China continues to be regarded as the most influential economic power by 59.9% of the respondents. However, its influence has declined significantly from 76.7% in 2022 following strict COVID-related mobility restrictions. The reduction in rating is recorded across all ASEAN countries except for Thailand and Indonesia.

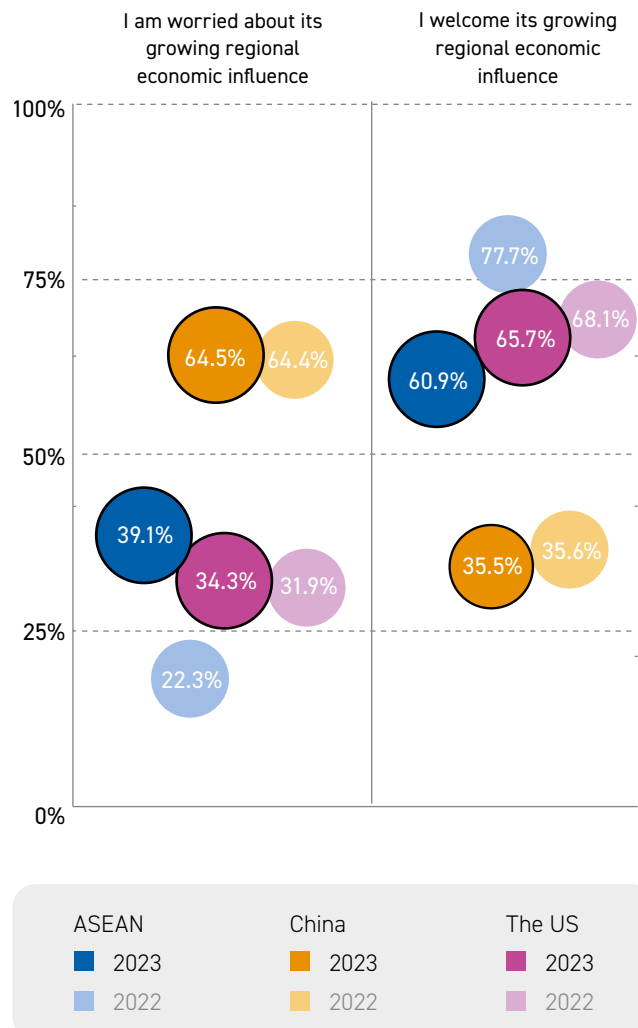
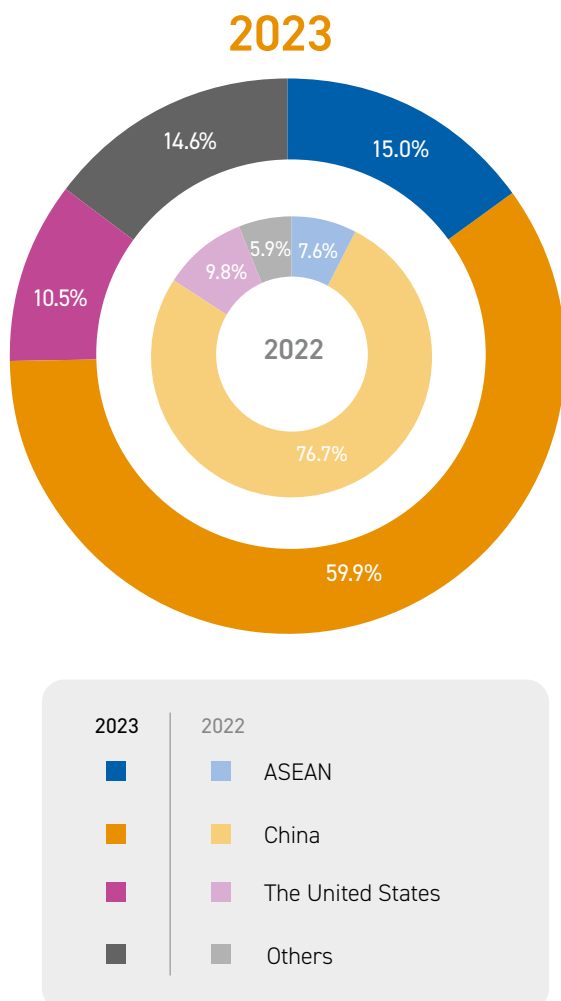
ASEAN's economic influence has doubled from 7.6% in 2022 to 15.0% in 2023, amidst the US-China trade tensions. A year after the Regional Comprehensive Economic Partnership Agreement entered into force, the perception of ASEAN's economic standing has increased considerably across all Southeast Asian countries, especially Laos (with an increase of more than ten-fold).

The United States has gained ground from 9.8% in 2022 to 10.5% in 2023 – although its ranking fell to third place. Its economic influence has gained significant recognition from

Brunei, Myanmar, and the Philippines. Middle powers, including Australia, the EU, India, Japan, the ROK, and the UK, have all gained traction in their economic standing.

The region continues to be worried about China's regional economic influence, with 64.5% of respondents expressing this view, while 35.5% welcome it (a level comparable to 2022). Several countries, including Cambodia, Laos, Malaysia, Philippines, Thailand, and Vietnam, have recorded greater concerns about China's economic rise.

Similar to the findings in previous years, most respondents welcome the growing regional economic influence of ASEAN (60.9%) and the US (65.7%), although concerns about ASEAN's economic influence have increased in most countries compared to 2022.



## Q19 In your view, which country/regional organisation is the most influential economic power in Southeast Asia?

Country	ASEAN		Australia		China		The European Union		India		Japan		Republic of Korea		The United States		The United Kingdom	
	2022	2023	2022	2023	2022	2023	2022	2023	2022	2023	2022	2023	2022	2023	2022	2023	2022	2023
ASEAN	7.6%	15.0%	0.5%	2.7%	76.7%	59.9%	1.7%	4.2%	0.1%	0.7%	2.6%	4.6%	0.5%	1.0%	9.8%	10.5%	0.5%	1.3%
BN	9.4%	10.0%	0.0%	5.8%	84.9%	44.2%	0.0%	7.5%	0.0%	4.2%	1.9%	12.5%	0.0%	2.5%	1.9%	6.7%	1.9%	6.7%
KH	9.9%	19.4%	0.0%	0.7%	84.0%	75.4%	1.2%	1.5%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	4.9%	2.2%	0.0%	0.7%
ID	13.7%	19.0%	1.5%	0.0%	67.9%	71.1%	0.0%	1.7%	0.0%	0.0%	5.3%	3.3%	1.5%	0.0%	8.4%	5.0%	1.5%	0.0%
LA	2.3%	29.9%	0.0%	16.8%	86.4%	20.6%	6.8%	16.8%	0.0%	0.0%	0.0%	6.5%	0.0%	1.9%	4.5%	5.6%	0.0%	1.9%
MY	11.1%	12.1%	0.0%	0.8%	72.6%	65.3%	1.5%	2.4%	0.0%	0.0%	3.0%	2.4%	0.0%	1.6%	11.9%	13.7%	0.0%	1.6%
MM	2.6%	4.3%	0.0%	0.9%	83.4%	72.2%	1.4%	1.7%	0.0%	0.9%	4.3%	5.2%	1.4%	0.0%	6.0%	13.9%	0.9%	0.9%
PH	6.3%	25.3%	0.8%	1.0%	65.8%	36.4%	2.8%	2.0%	0.0%	0.0%	5.3%	7.1%	0.8%	1.0%	18.3%	26.3%	0.3%	1.0%
SG	3.6%	10.6%	0.0%	0.5%	81.1%	70.7%	1.4%	1.4%	0.0%	1.0%	1.8%	1.9%	0.0%	0.5%	12.2%	13.5%	0.0%	0.0%
TH	7.7%	8.3%	1.7%	0.7%	69.2%	74.3%	0.9%	2.8%	0.9%	0.7%	4.3%	3.5%	1.7%	0.0%	13.7%	9.0%	0.0%	0.7%
VN	9.7%	11.0%	0.7%	0.0%	71.5%	69.1%	0.7%	4.4%	0.0%	0.0%	0.7%	3.7%	0.0%	2.2%	16.7%	9.6%	0.0%	0.0%

## Q20 What is your view of this economic power's influence on your country?

187 respondents who chose the "ASEAN" option in Q19; 810 respondents who chose the "China" option in Q19; 136 respondents who chose the "The US" option in Q19

Country	ASEAN				China				The United States			
	I am worried about its growing regional economic influence		I welcome its growing regional economic influence		I am worried about its growing regional economic influence		I welcome its growing regional economic influence		I am worried about its growing regional economic influence		I welcome its growing regional economic influence	
	2022	2023	2022	2023	2022	2023	2022	2023	2022	2023	2022	2023
ASEAN	22.3%	39.1%	77.7%	60.9%	64.4%	64.5%	35.6%	35.5%	31.9%	34.3%	68.1%	65.7%
BN	40.0%	16.7%	60.0%	83.3%	55.6%	13.2%	44.4%	86.8%	0.0%	12.5%	100.0%	87.5%
KH	0.0%	53.8%	100.0%	46.2%	29.4%	50.5%	70.6%	49.5%	25.0%	66.7%	75.0%	33.3%
ID	33.3%	56.5%	66.7%	43.5%	60.7%	50.0%	39.3%	50.0%	45.5%	50.0%	54.5%	50.0%
LA	0.0%	31.3%	100.0%	68.8%	65.8%	72.7%	34.2%	27.3%	100.0%	50.0%	0.0%	50.0%
MY	0.0%	40.0%	100.0%	60.0%	55.1%	61.7%	44.9%	38.3%	37.5%	35.3%	62.5%	64.7%
MM	44.4%	20.0%	55.6%	80.0%	87.3%	79.5%	12.7%	20.5%	23.8%	18.8%	76.2%	81.3%
PH	4.0%	44.0%	96.0%	56.0%	76.4%	83.3%	23.6%	16.7%	13.7%	26.9%	86.3%	73.1%
SG	25.0%	27.3%	75.0%	72.7%	73.9%	61.9%	26.1%	38.1%	25.9%	21.4%	74.1%	78.6%
TH	33.3%	75.0%	66.7%	25.0%	66.7%	86.0%	33.3%	14.0%	18.8%	46.2%	81.3%	53.8%
VN	42.9%	26.7%	57.1%	73.3%	72.8%	86.2%	27.2%	13.8%	29.2%	15.4%	70.8%	84.6%

# MOST INFLUENTIAL POLITICAL AND STRATEGIC POWER IN SOUTHEAST ASIA

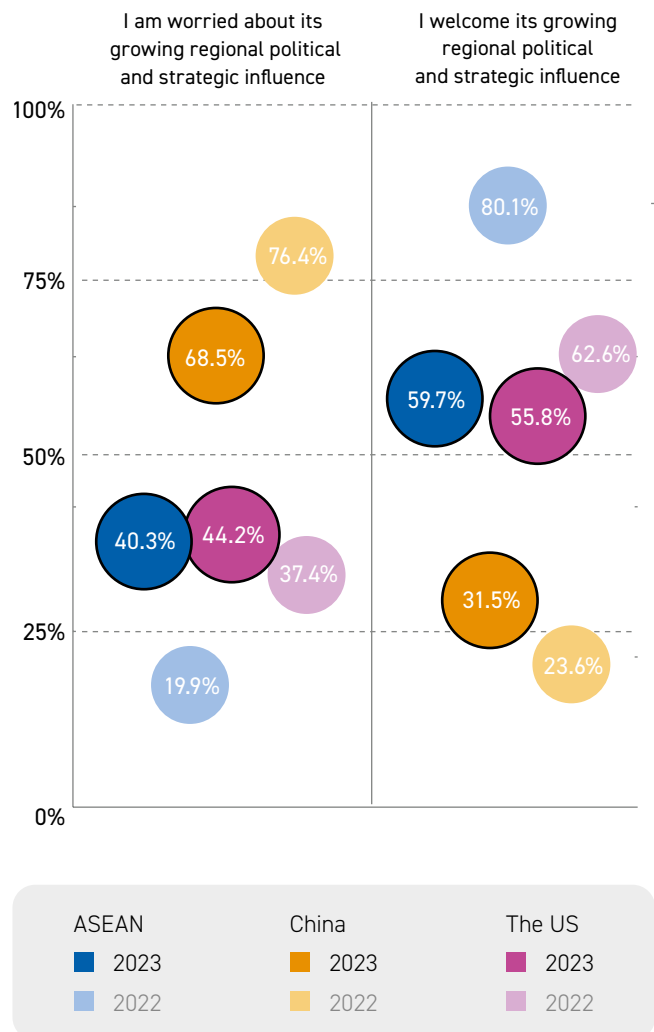
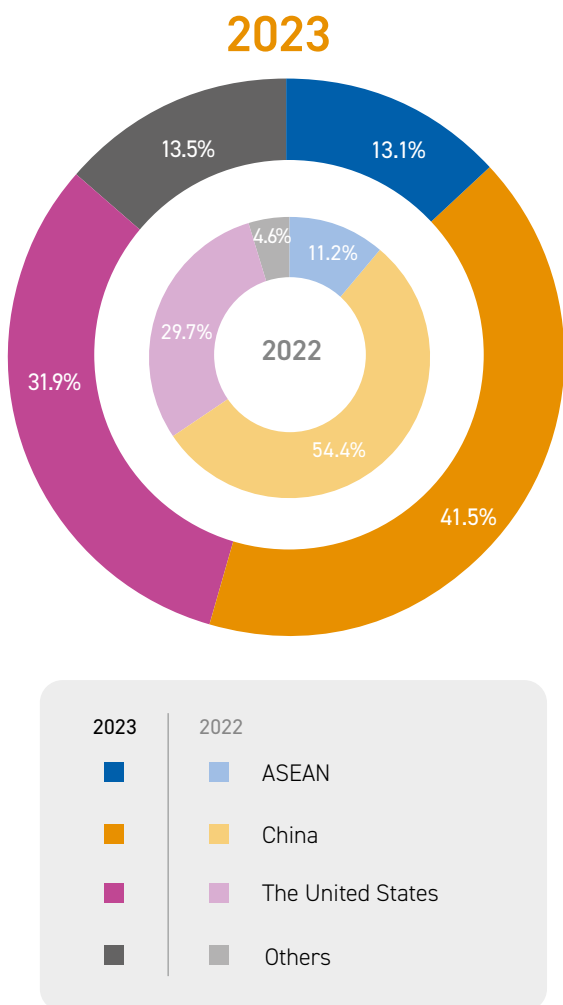
China remains the most influential and strategic power in Southeast Asia (41.5%), followed by the US (31.9%) and ASEAN (13.1%). While China retains its top position, its influence has declined significantly from 54.4% in 2022, reducing its lead over the growing political and strategic influence of the US and ASEAN.

An increasing number of Southeast Asian countries including Indonesia, Myanmar, the Philippines, and Singapore are choosing the US over China. The reduction in the perception of China's political and strategic influence is most palpable among Laos (-44.2%) and Myanmar (-30.9%) respondents.

Similar to the sentiments of previous years, the region is generally worried about China's growing regional political and

strategic influence (68.5%), although the extent of wariness has decreased over the past two years (down from 76.4% in 2022 and 86.5% in 2021). Brunei (94.4%) followed by Cambodia (47.4%) has shown the greatest acceptance of China's influence.

Similar to past trends, respondents welcomed ASEAN's (59.7%) and the US' (55.8%) growing regional political and strategic influence. However, despite the acceptance, regional respondents are increasingly cautious about ASEAN (a two-fold increase) and the US' (6.8% increase) political and strategic influence in their countries. The Philippines (66.7%), Myanmar (60.0%), and Thailand (76.9%) are most apprehensive of ASEAN's growing influence.



## Q21 In your view, which country/regional organisation has the most political and strategic influence in Southeast Asia?

Country	ASEAN		Australia		China		The European Union		India		Japan		Republic of Korea		The United States		The United Kingdom	
	2022	2023	2022	2023	2022	2023	2022	2023	2022	2023	2022	2023	2022	2023	2022	2023	2022	2023
ASEAN	11.2%	13.1%	0.8%	3.0%	54.4%	41.5%	0.8%	4.9%	0.2%	0.9%	1.4%	1.9%	0.6%	1.7%	29.7%	31.9%	0.8%	1.1%
BN	22.6%	4.2%	1.9%	7.5%	39.6%	45.0%	0.0%	9.2%	0.0%	5.0%	0.0%	5.8%	1.9%	7.5%	34.0%	13.3%	0.0%	2.5%
KH	7.4%	6.0%	0.0%	0.7%	75.3%	72.4%	0.0%	3.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	17.3%	17.9%	0.0%	0.0%
ID	16.0%	24.8%	3.1%	1.7%	38.2%	29.8%	2.3%	5.0%	0.8%	0.8%	1.5%	1.7%	1.5%	0.8%	35.1%	35.5%	1.5%	0.0%
LA	13.6%	17.8%	0.0%	14.0%	75.0%	30.8%	0.0%	17.8%	0.0%	0.9%	2.3%	0.0%	0.0%	2.8%	9.1%	13.1%	0.0%	2.8%
MY	20.0%	21.8%	1.5%	3.2%	51.1%	35.5%	0.7%	0.8%	0.0%	0.0%	0.7%	1.6%	0.0%	0.8%	24.4%	33.9%	1.5%	2.4%
MM	2.0%	4.3%	0.0%	0.9%	70.9%	40.0%	1.1%	1.7%	0.0%	0.0%	3.4%	1.7%	2.3%	0.0%	19.7%	49.6%	0.6%	1.7%
PH	8.3%	18.2%	0.3%	0.0%	37.0%	30.3%	1.3%	3.0%	0.3%	0.0%	1.8%	2.0%	0.0%	2.0%	51.0%	44.4%	0.3%	0.0%
SG	4.1%	12.0%	0.0%	1.0%	48.2%	33.2%	0.0%	2.4%	0.0%	2.4%	0.0%	1.0%	0.0%	0.0%	46.8%	48.1%	0.9%	0.0%
TH	7.7%	9.0%	0.9%	0.7%	55.6%	45.8%	2.6%	2.8%	0.9%	0.0%	2.6%	1.4%	0.0%	2.8%	27.4%	36.1%	2.6%	1.4%
VN	10.4%	13.2%	0.7%	0.7%	52.8%	52.2%	0.0%	2.9%	0.0%	0.0%	2.1%	3.7%	0.7%	0.0%	32.6%	27.2%	0.7%	0.0%

## Q22 What is your view of this political and strategic power's influence on your country?

168 respondents who chose the "ASEAN" option in Q21; 546 respondents who chose the "China" option in Q21; 429 respondents who chose "The US" option in Q21

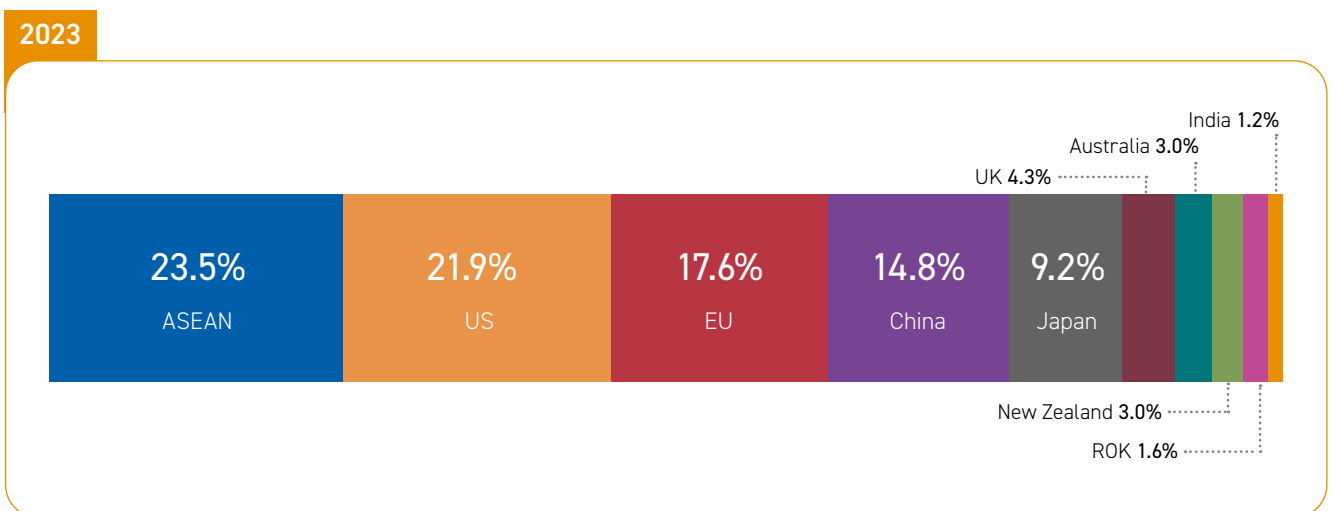
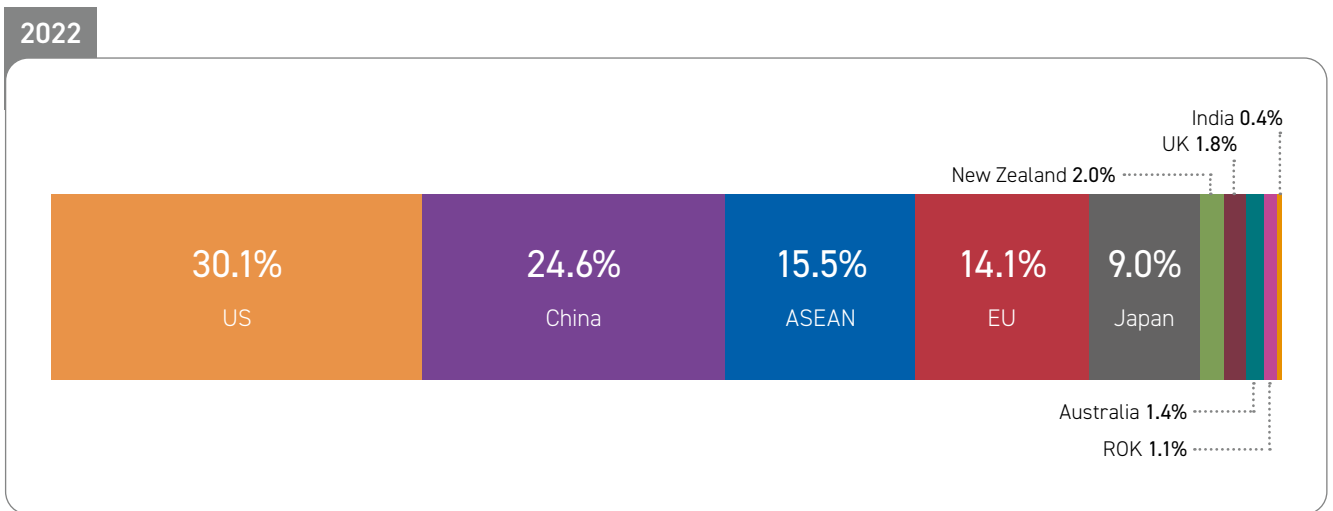
Country	ASEAN				China				The United States			
	I am worried about its growing regional political and strategic influence		I welcome its growing regional political and strategic influence		I am worried about its growing regional political and strategic influence		I welcome its growing regional political and strategic influence		I am worried about its growing regional political and strategic influence		I welcome its growing regional political and strategic influence	
	2022	2023	2022	2023	2022	2023	2022	2023	2022	2023	2022	2023
ASEAN	19.9%	40.3%	80.1%	59.7%	76.4%	68.5%	23.6%	31.5%	37.4%	44.2%	62.6%	55.8%
BN	16.7%	0.0%	83.3%	100.0%	81.0%	5.6%	19.0%	94.4%	27.8%	31.3%	72.2%	68.8%
KH	0.0%	37.5%	100.0%	62.5%	45.9%	52.6%	54.1%	47.4%	64.3%	58.3%	35.7%	41.7%
ID	33.3%	33.3%	66.7%	66.7%	66.0%	61.1%	34.0%	38.9%	50.0%	67.4%	50.0%	32.6%
LA	33.3%	42.1%	66.7%	57.9%	78.8%	63.6%	21.2%	36.4%	50.0%	42.9%	50.0%	57.1%
MY	11.1%	33.3%	88.9%	66.7%	62.3%	72.7%	37.7%	27.3%	51.5%	57.1%	48.5%	42.9%
MM	57.1%	60.0%	42.9%	40.0%	93.5%	84.8%	6.5%	15.2%	21.7%	28.1%	78.3%	71.9%
PH	12.1%	66.7%	87.9%	33.3%	88.5%	86.7%	11.5%	13.3%	24.0%	29.5%	76.0%	70.5%
SG	0.0%	20.0%	100.0%	80.0%	90.7%	69.6%	9.3%	30.4%	21.2%	39.0%	78.8%	61.0%
TH	22.2%	76.9%	77.8%	23.1%	76.9%	95.5%	23.1%	4.5%	46.9%	61.5%	53.1%	38.5%
VN	13.3%	33.3%	86.7%	66.7%	80.3%	93.0%	19.7%	7.0%	17.0%	27.0%	83.0%	73.0%

# LEADERSHIP IN CHAMPIONING GLOBAL FREE TRADE

The world economy continues to be turbulent as it battles inflation, soaring energy prices, supply chain disruptions, and the ongoing US-China competition.

Amidst all these, the region's confidence in ASEAN's leadership in global free trade soared from 15.5% in 2022 to 23.5% in 2023, placing it in the top spot ahead of the US (21.9%) and the EU (17.6%). As the US-China rivalry intensifies, the region's confidence in the two major powers decreased significantly, while confidence in ASEAN and other middle powers increased. The entry into force of the Regional Comprehensive Economic Partnership Agreement and the diversification of production sites from China to Southeast Asia may have resulted in greater confidence in ASEAN.

The significant increase in support for ASEAN's economic leadership comes from Indonesia, Laos, Malaysia, and Singapore. On the other hand, China saw a significant reduction in confidence from Cambodia and Laos, while the US experienced a considerable loss of confidence from Indonesia, Malaysia, Singapore, and Thailand despite launching the Indo-Pacific Economic Framework for Prosperity involving these countries.



## Q23 Who do you have the most confidence in to champion the global free trade agenda?

2022										
Country	ASEAN	Australia	China	The European Union	India	Japan	New Zealand	Republic of Korea	The United Kingdom	The United States
ASEAN	15.5%	1.4%	24.6%	14.1%	0.4%	9.0%	2.0%	1.1%	1.8%	30.1%
Brunei	39.6%	3.8%	11.3%	7.5%	0.0%	17.0%	7.5%	0.0%	1.9%	11.3%
Cambodia	2.5%	0.0%	71.6%	6.2%	0.0%	3.7%	0.0%	1.2%	0.0%	14.8%
Indonesia	25.2%	2.3%	25.2%	12.2%	0.8%	6.1%	2.3%	0.8%	1.5%	23.7%
Laos	6.8%	0.0%	61.4%	6.8%	0.0%	9.1%	0.0%	0.0%	0.0%	15.9%
Malaysia	11.1%	0.7%	21.5%	16.3%	0.0%	6.7%	1.5%	2.2%	2.2%	37.8%
Myanmar	5.1%	1.1%	3.1%	18.3%	0.0%	10.9%	1.7%	5.1%	3.4%	51.1%
Philippines	25.3%	2.8%	2.0%	17.8%	0.5%	12.8%	1.5%	0.3%	3.0%	34.3%
Singapore	11.7%	2.3%	10.8%	17.6%	0.0%	8.1%	2.7%	0.0%	3.2%	43.7%
Thailand	12.8%	0.9%	22.2%	20.5%	1.7%	7.7%	2.6%	0.9%	2.6%	28.2%
Vietnam	15.3%	0.0%	16.7%	17.4%	0.7%	8.3%	0.0%	0.7%	0.7%	40.3%

2023										
Country	ASEAN	Australia	China	The European Union	India	Japan	New Zealand	Republic of Korea	The United Kingdom	The United States
ASEAN	23.5%	3.0%	14.8%	17.6%	1.2%	9.2%	3.0%	1.6%	4.3%	21.9%
Brunei	36.7%	3.3%	6.7%	20.0%	3.3%	3.3%	11.7%	1.7%	5.8%	7.5%
Cambodia	5.2%	1.5%	35.8%	18.7%	0.0%	5.2%	0.0%	0.0%	0.7%	32.8%
Indonesia	43.0%	2.5%	18.2%	10.7%	0.8%	10.7%	2.5%	3.3%	5.8%	2.5%
Laos	26.2%	10.3%	14.0%	25.2%	0.0%	4.7%	2.8%	0.0%	2.8%	14.0%
Malaysia	28.2%	5.6%	16.9%	15.3%	0.0%	8.9%	4.0%	4.0%	1.6%	15.3%
Myanmar	8.7%	0.0%	9.6%	7.0%	3.5%	13.9%	0.9%	0.9%	2.6%	53.0%
Philippines	27.3%	1.0%	5.1%	17.2%	0.0%	15.2%	0.0%	2.0%	2.0%	30.3%
Singapore	25.5%	3.8%	17.3%	17.3%	1.4%	6.3%	5.8%	1.4%	2.4%	18.8%
Thailand	14.6%	2.1%	17.4%	21.5%	2.1%	9.0%	2.8%	0.7%	18.8%	11.1%
Vietnam	19.9%	0.0%	6.6%	22.8%	0.7%	14.7%	0.0%	1.5%	0.0%	33.8%

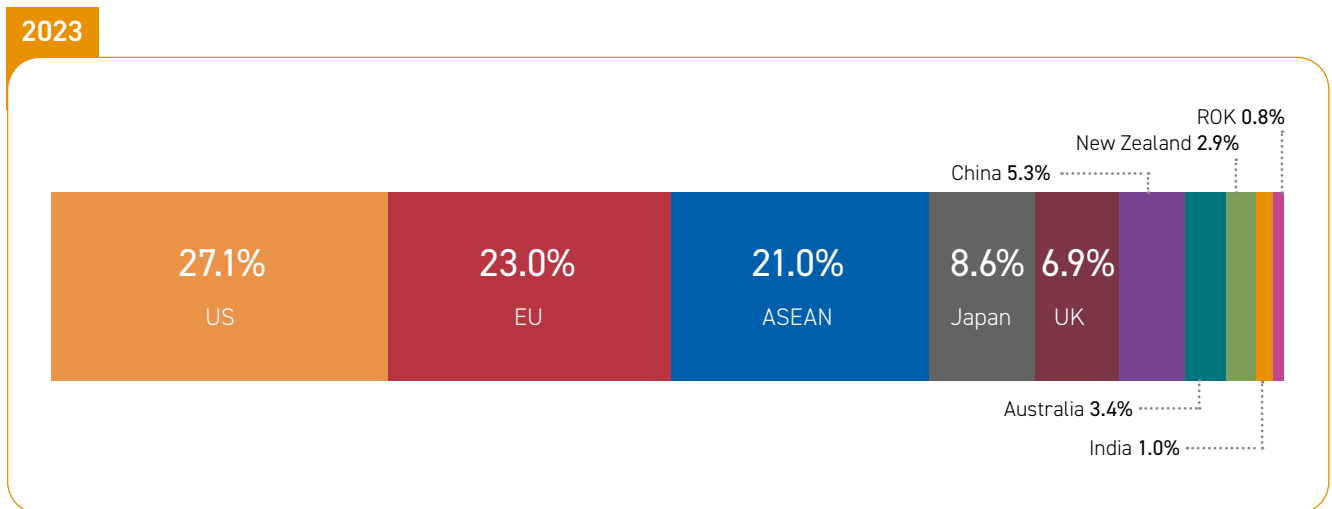
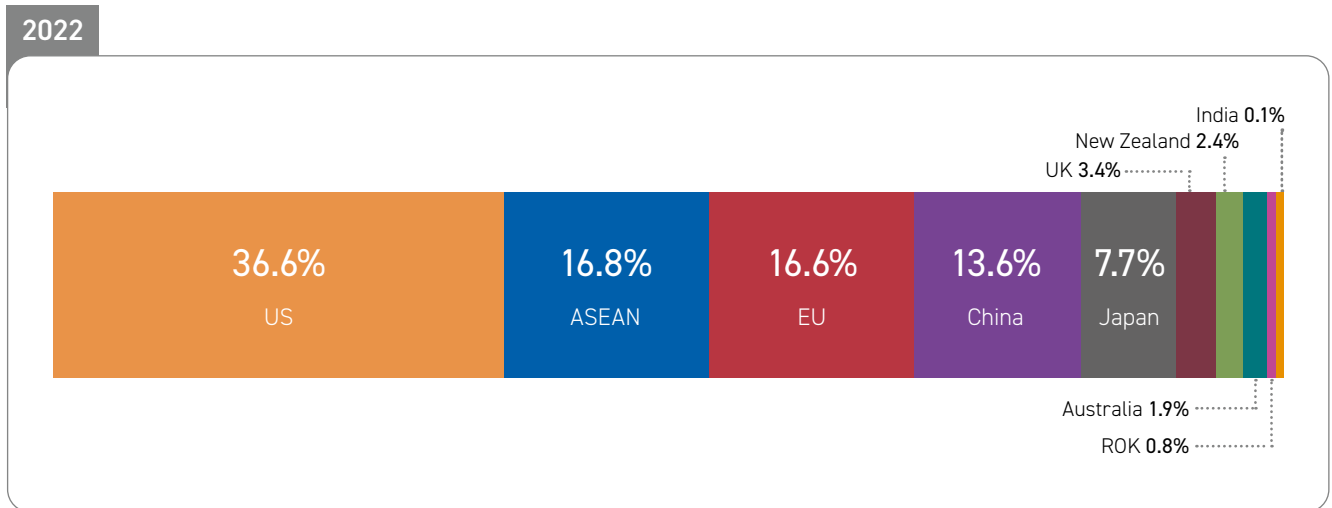
# LEADERSHIP IN MAINTAINING RULES-BASED ORDER AND UPHOLDING INTERNATIONAL LAW

The US retained its position as the region's top choice in maintaining a rules-based order and upholding international law at 27.1%, albeit with a decline from 36.6% in 2022. The EU regained the region's confidence as its share increased from 16.6% to 23.0%, elevating it to second place this year. Although ASEAN's position declined (from 2<sup>nd</sup> to 3<sup>rd</sup> rank), it has gained 4.2 percentage points to 21.0% in 2023.

The effect of the US-China rivalry continues to be felt as both major powers suffered a decline in confidence from Southeast Asian countries. China's rating fell significantly from 13.6% in 2022 to only 5.3% in 2023, possibly due to the consequence of its "no limits" partnership with Russia and the failure to condemn

the country following its invasion of Ukraine. While most regional respondents have reduced their confidence in China, the biggest decline came from Cambodia, with ratings falling from a high of 65.4% last year to a low of 2.2% this year, casting its confidence in the US and the EU (as their top supporter) instead.

Apart from Cambodia, the US continues to enjoy confidence from Myanmar, the Philippines, Singapore, and Vietnam. The EU received a higher percentage share of confidence from all regional countries except Indonesia and Myanmar. Similarly, confidence in ASEAN increased among all Southeast Asian countries except for Laos.





## Q24 Who do you have the most confidence in to provide leadership to maintain the rules-based order and uphold international law?

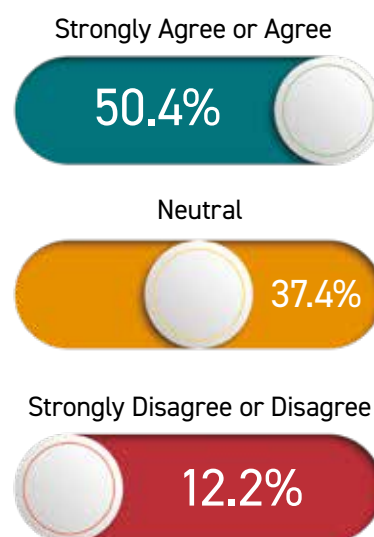
2022										
Country	ASEAN	Australia	China	The European Union	India	Japan	New Zealand	Republic of Korea	The United Kingdom	The United States
ASEAN	16.8%	1.9%	13.6%	16.6%	0.1%	7.7%	2.4%	0.8%	3.4%	36.6%
Brunei	28.3%	7.5%	1.9%	13.2%	0.0%	9.4%	5.7%	3.8%	13.2%	17.0%
Cambodia	2.5%	0.0%	65.4%	7.4%	0.0%	3.7%	1.2%	0.0%	0.0%	19.8%
Indonesia	32.8%	1.5%	11.5%	22.9%	0.0%	7.6%	2.3%	0.0%	1.5%	19.8%
Laos	38.6%	0.0%	9.1%	13.6%	0.0%	27.3%	0.0%	0.0%	2.3%	9.1%
Malaysia	9.6%	3.0%	14.8%	18.5%	0.0%	3.7%	1.5%	0.7%	0.7%	47.4%
Myanmar	5.1%	1.1%	1.4%	16.9%	0.0%	5.1%	1.7%	2.9%	4.9%	60.9%
Philippines	23.0%	3.8%	0.3%	16.5%	0.0%	7.0%	2.5%	0.5%	3.0%	43.5%
Singapore	6.8%	0.9%	4.1%	18.9%	0.0%	2.3%	0.9%	0.5%	4.1%	61.7%
Thailand	9.4%	0.0%	16.2%	27.4%	0.9%	6.0%	7.7%	0.0%	2.6%	29.9%
Vietnam	11.8%	1.4%	11.8%	11.1%	0.0%	4.9%	0.7%	0.0%	1.4%	56.9%

2023										
Country	ASEAN	Australia	China	The European Union	India	Japan	New Zealand	Republic of Korea	The United Kingdom	The United States
ASEAN	21.0%	3.4%	5.3%	23.0%	1.0%	8.6%	2.9%	0.8%	6.9%	27.1%
Brunei	30.8%	5.8%	2.5%	20.0%	0.8%	14.2%	5.0%	2.5%	10.8%	7.5%
Cambodia	4.5%	0.0%	2.2%	38.8%	0.0%	4.5%	0.7%	0.0%	0.7%	48.5%
Indonesia	43.8%	0.8%	6.6%	16.5%	0.0%	9.9%	1.7%	2.5%	6.6%	11.6%
Laos	14.0%	17.8%	5.6%	29.0%	0.0%	6.5%	8.4%	0.0%	11.2%	7.5%
Malaysia	26.6%	4.8%	6.5%	19.4%	0.0%	10.5%	3.2%	0.8%	4.0%	24.2%
Myanmar	12.2%	0.0%	7.0%	6.1%	6.1%	11.3%	2.6%	0.0%	2.6%	52.2%
Philippines	27.3%	0.0%	2.0%	16.2%	0.0%	10.1%	3.0%	1.0%	4.0%	36.4%
Singapore	15.9%	2.9%	10.6%	24.5%	1.4%	5.8%	2.4%	0.5%	4.8%	31.3%
Thailand	12.5%	1.4%	9.0%	32.6%	0.0%	6.9%	2.1%	0.7%	22.9%	11.8%
Vietnam	22.1%	0.7%	1.5%	26.5%	1.5%	6.6%	0.0%	0.0%	1.5%	39.7%

## VIEWS ON THE QUADRILATERAL SECURITY DIALOGUE (QUAD)

The Quadrilateral Security Dialogue (QUAD) between Australia, India, Japan, and the US continues to strengthen and boost its cooperation through regular leaders' summits and strategic cooperation. Despite concerns that the QUAD may undermine ASEAN centrality, 50.4% of regional respondents agree or strongly agree that the strengthening of the mini-lateral group will be constructive for the region. This view is supported by Brunei, Indonesia, Malaysia, Myanmar, the Philippines, Singapore, Thailand, and Vietnam.

Only 12.2% of the respondents disagree or strongly disagree, a slight decline from 13.1% in 2022. Among those, Singapore (19.7%), Thailand (15.3%) and Indonesia (14.9%) are the most pessimistic. The number of neutral respondents has increased from 28.5% to 37.4%, among whom, Cambodia (67.2%) and Laos (60.7%) form the majority.



### Q25 Strengthening of the Quad is positive and reassuring for Southeast Asia.

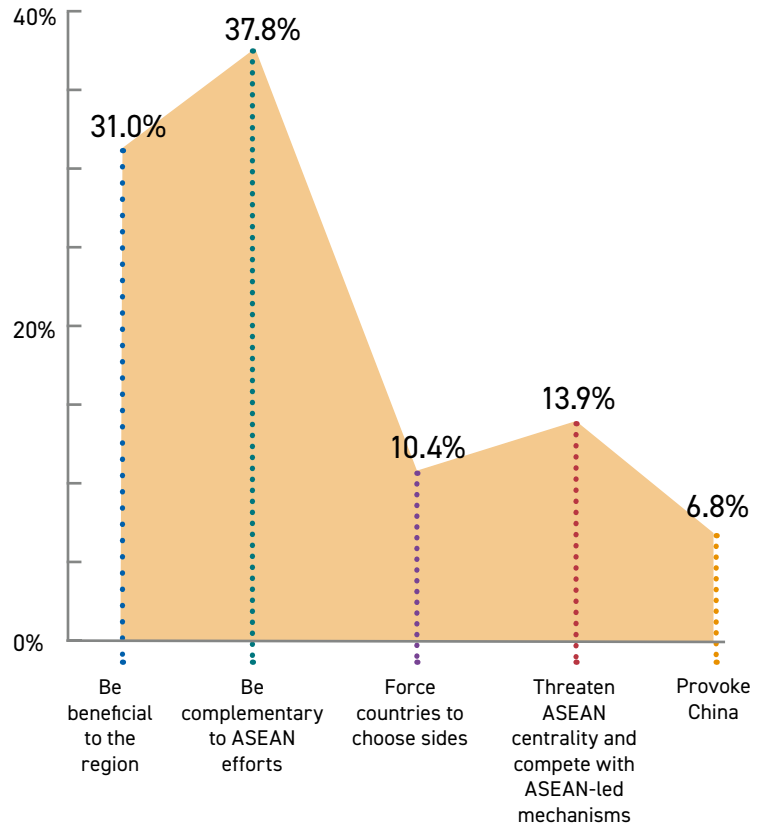
Country	Strongly Agree	Agree	Neutral	Disagree	Strongly Disagree
ASEAN	13.8%	36.6%	37.4%	8.5%	3.7%
Brunei	10.8%	53.5%	23.3%	5.8%	6.7%
Cambodia	8.2%	11.9%	67.2%	7.5%	5.2%
Indonesia	14.9%	36.4%	33.9%	12.4%	2.5%
Laos	3.7%	25.2%	60.7%	9.3%	0.9%
Malaysia	8.1%	41.9%	38.7%	7.3%	4.0%
Myanmar	14.8%	46.1%	25.2%	10.4%	3.5%
Philippines	28.3%	33.3%	31.3%	4.0%	3.0%
Singapore	14.9%	35.6%	29.8%	11.5%	8.2%
Thailand	17.4%	35.4%	31.9%	11.8%	3.5%
Vietnam	16.9%	47.1%	31.6%	4.4%	0.0%

# IMPACTS FROM COOPERATION WITH THE QUAD

As the Indo-Pacific region continues to gain prominence and the QUAD stepping up its cooperation, ASEAN remains ambivalent in cooperating with the mini-lateral grouping.

The largest group (37.8%) of Southeast Asians (especially those from Indonesia and Vietnam) feel that cooperation with the QUAD will be complementary to ASEAN efforts. 31.0% of the respondents feel that it will be beneficial for the region – the top option for Lao respondents.

Among those who are less optimistic, 13.9% feel that the QUAD will threaten ASEAN centrality and compete with ASEAN-led mechanisms – mainly supported by respondents from Cambodia. 10.4% believe that the QUAD will force countries to choose sides (the top choice for Brunei respondents), while 6.8% perceive that the QUAD will provoke China, supported mainly by respondents from Malaysia and Myanmar.



## Q26 Cooperation with the Quad will:

Country	Be beneficial to the region	Be complementary to ASEAN efforts	Force countries to choose sides	Threaten ASEAN centrality and compete with ASEAN-led mechanisms	Provoke China
ASEAN	31.0%	37.8%	10.4%	13.9%	6.8%
Brunei	23.9%	21.7%	31.5%	18.5%	4.3%
Cambodia	22.7%	27.3%	11.4%	34.1%	4.5%
Indonesia	25.0%	53.8%	5.0%	15.0%	1.3%
Laos	42.9%	31.0%	14.3%	9.5%	2.4%
Malaysia	27.6%	44.7%	3.9%	10.5%	13.2%
Myanmar	31.4%	37.2%	14.0%	4.7%	12.8%
Philippines	39.7%	42.6%	2.9%	8.8%	5.9%
Singapore	28.8%	33.6%	11.6%	16.4%	9.6%
Thailand	31.6%	35.7%	8.2%	13.3%	11.2%
Vietnam	36.6%	50.5%	1.1%	8.6%	3.2%

# CONFIDENCE TOWARDS CHINA'S GLOBAL SECURITY INITIATIVE (GSI)

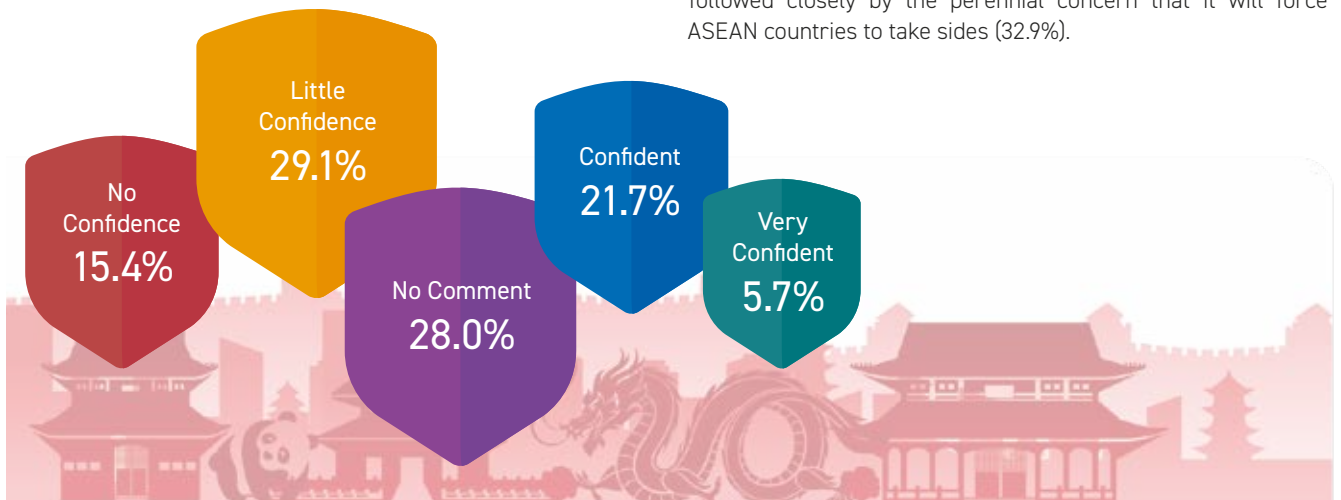
The Global Security Initiative (GSI) was proposed by China in 2022 to promote common and sustainable security. It focuses on the principle of "indivisible security" by opposing the pursuit of security at the expense of others and rejecting "group or bloc confrontations" according to Chinese President Xi Jinping.

Viewed by observers as an initiative to counter western security narratives and to increase China's global influence, 44.5% of regional respondents express little or no confidence that it will benefit the region. 27.4% feel confident or very confident, while 28.0% of respondents have no comment.

The confident and very confident views are more pronounced among respondents from Brunei and Cambodia, while those from Indonesia, Myanmar, the Philippines, Thailand, and Vietnam are less confident.

Among respondents who feel that the GSI will benefit the region, 32.8% are of the view that it will complement other security initiatives in the region, while a close 30.3% of respondents feel that it will promote a balance of power in the region. 23.8% believe that the GSI principles are positive and reassuring.

For those less confident of the GSI, the top concern is the potential increase in tensions between the US and China (33.1%), followed closely by the perennial concern that it will force ASEAN countries to take sides (32.9%).



## Q27 How confident are you that China's Global Security Initiative (GSI) will benefit the region?

Country	No Confidence	Little Confidence	No Comment	Confident	Very Confident
ASEAN	15.4%	29.1%	28.0%	21.7%	5.7%
Brunei	5.0%	16.7%	20.8%	47.5%	10.0%
Cambodia	4.5%	11.9%	34.3%	28.4%	20.9%
Indonesia	17.4%	42.1%	21.5%	16.5%	2.5%
Laos	1.9%	17.8%	45.8%	31.8%	2.8%
Malaysia	7.3%	37.1%	30.6%	21.0%	4.0%
Myanmar	47.8%	20.9%	23.5%	6.1%	1.7%
Philippines	16.2%	36.4%	29.3%	15.2%	3.0%
Singapore	14.4%	29.8%	32.2%	18.3%	5.3%
Thailand	15.3%	36.8%	20.1%	21.5%	6.3%
Vietnam	24.3%	41.9%	22.1%	11.0%	0.7%

## Q28 China's Global Security Initiative (GSI) will benefit the region because... (choose the most important reason)

358 respondents who chose the "Confident" and "Very Confident" options in Q27

Country	GSI principles are positive and reassuring	It will complement other security initiatives in the region	It will promote a balance of power in the region	It will strengthen the international rules-based order
ASEAN	23.8%	32.8%	30.3%	13.1%
Brunei	15.9%	43.5%	36.2%	4.3%
Cambodia	37.9%	39.4%	15.2%	7.6%
Indonesia	21.7%	30.4%	21.7%	26.1%
Laos	27.0%	29.7%	32.4%	10.8%
Malaysia	12.9%	38.7%	35.5%	12.9%
Myanmar	44.4%	22.2%	22.2%	11.1%
Philippines	11.1%	38.9%	38.9%	11.1%
Singapore	22.4%	28.6%	40.8%	8.2%
Thailand	20.0%	37.5%	22.5%	20.0%
Vietnam	25.0%	18.8%	37.5%	18.8%

## Q29 China's Global Security Initiative (GSI) will NOT benefit the region because... (choose the most important reason)

584 respondents who chose the "Little Confidence" and "No Confidence" options in Q27

Country	It will destabilise the region	It will increase tensions between US and China	It will force ASEAN countries to take sides	It will disrupt the international rules-based order
ASEAN	16.8%	33.1%	32.9%	17.3%
Brunei	15.4%	23.1%	46.2%	15.4%
Cambodia	18.2%	31.8%	31.8%	18.2%
Indonesia	13.9%	37.5%	31.9%	16.7%
Laos	28.6%	33.3%	28.6%	9.5%
Malaysia	12.7%	43.6%	32.7%	10.9%
Myanmar	48.1%	26.6%	13.9%	11.4%
Philippines	3.8%	40.4%	25.0%	30.8%
Singapore	6.5%	25.0%	43.5%	25.0%
Thailand	10.7%	36.0%	37.3%	16.0%
Vietnam	10.0%	33.3%	37.8%	18.9%

## SECTION IV: US-China Rivalry and Impact on Southeast Asia

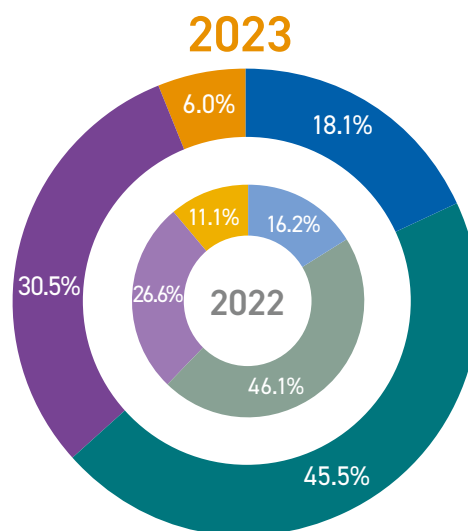
This section examines ASEAN's sentiments and options in the unfolding power competition in the region, especially the deepening rivalry between China and the United States.

### ASSESSING ASEAN'S "NON-CHOICE"

Similar to the findings of the last two years, Southeast Asian respondents continue to favour the option of enhancing ASEAN's resilience and unity to fend off pressure from the two major powers (45.5%) as a more proactive response. This option is most pronounced among respondents from Vietnam (61.0%) — a significant increase from 2022 — and the Philippines (59.6%).

The second most popular or traditional option of ASEAN continuing its position of not siding with China or the US has increased slightly from 26.6% in 2022 to 30.5% in 2023, and is the top choice for Lao respondents. This is followed by the option of ASEAN seeking out "third parties" to broaden its strategic space and options (18.1%), with Cambodia's increase being the most significant.

The option of ASEAN choosing sides between one of the two major powers as remaining neutral is impractical remains the least popular option at 6.0%, falling significantly from 11.1% in 2022, reflecting the region's renewed desire for ASEAN to remain neutral.



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

Country	ASEAN has to seek out "third parties" to broaden its strategic space and options		ASEAN should enhance its resilience and unity to fend off pressure from the two major powers		ASEAN should continue its position of not siding with China or the US		ASEAN has to choose between one of the two major powers as remaining neutral is impractical	
	2022	2023	2022	2023	2022	2023	2022	2023
ASEAN	16.2%	18.1%	46.1%	45.5%	26.6%	30.5%	11.1%	6.0%
Brunei	17.0%	21.7%	50.9%	37.5%	28.3%	32.5%	3.8%	8.3%
Cambodia	11.1%	32.1%	44.4%	20.1%	30.9%	37.3%	13.6%	10.4%
Indonesia	18.3%	14.0%	52.7%	46.3%	22.1%	33.1%	6.9%	6.6%
Laos	13.6%	10.3%	50.0%	37.4%	27.3%	44.9%	9.1%	7.5%
Malaysia	15.6%	12.9%	35.6%	44.4%	36.3%	37.9%	12.6%	4.8%
Myanmar	16.6%	21.7%	25.1%	46.1%	27.7%	25.2%	30.6%	7.0%
Philippines	13.3%	17.2%	63.5%	59.6%	17.8%	19.2%	5.5%	4.0%
Singapore	18.0%	16.8%	38.3%	45.2%	36.9%	33.7%	6.8%	4.3%
Thailand	17.1%	17.4%	49.6%	56.9%	20.5%	23.6%	12.8%	2.1%
Vietnam	21.5%	16.9%	50.7%	61.0%	18.1%	17.6%	9.7%	4.4%

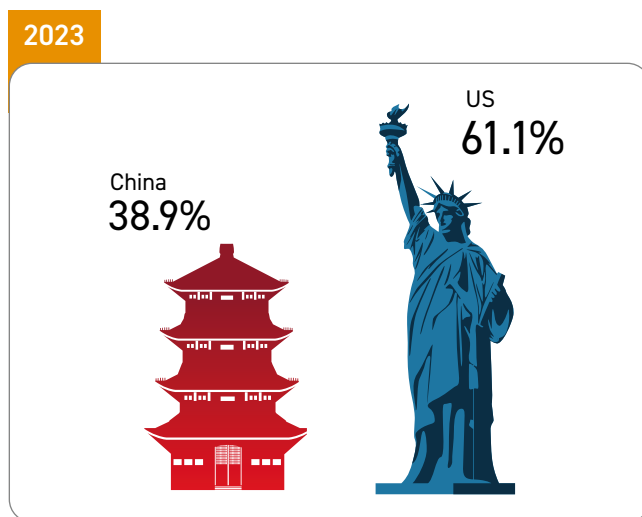
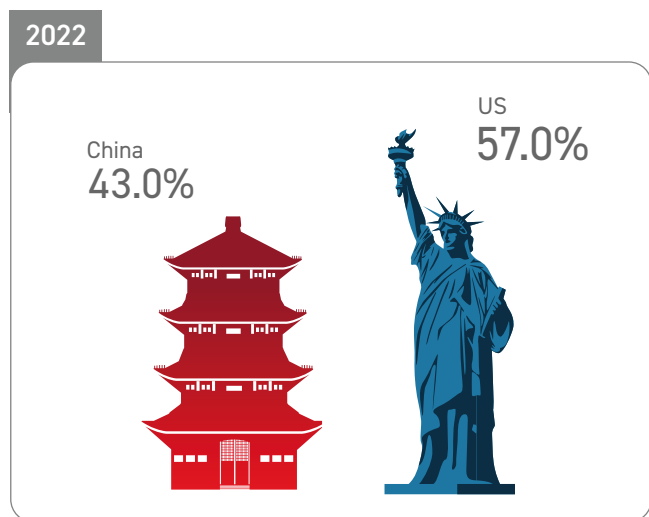
# ASEAN'S FUTURE: CHINA OR THE UNITED STATES?

The US' popularity among Southeast Asian respondents continues to increase (from 57.0% in 2022 to 61.1% in 2023) compared to 38.9% of the respondents who chose China — further widening the popularity gap between the major powers.

Country-level data reveals a significant shift in the attitude among ASEAN countries. The US has gained significant positive perceptions from Cambodia (18.5% to 73.1%) and Laos (18.2% to 58.9%), while support from the respondents of six ASEAN

countries fell, with Myanmar and Singapore being the most significant.

China continues to enjoy popular support from Brunei's respondents (55.0%), and has gained greater support from Malaysia (54.8%) and Indonesia (53.7%). While the majority of Myanmar respondents has chosen the US over China, the percentage share for China has increased nearly four-fold from 8.0% in 2022 to 32.2% in 2023.



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

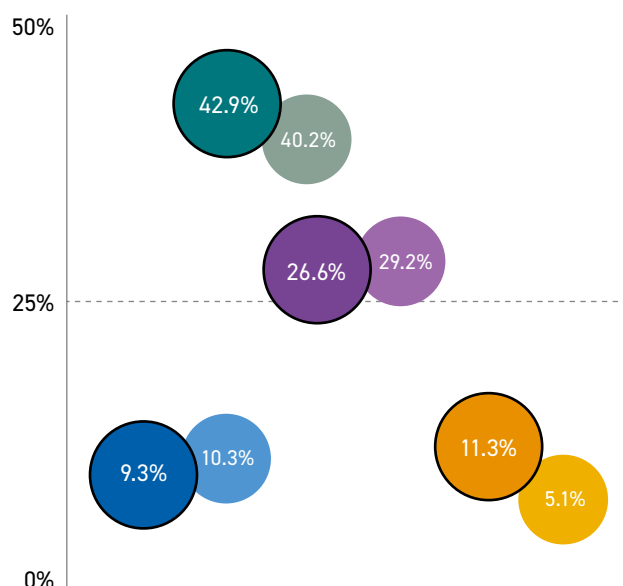
Country	China		The United States	
	2022	2023	2022	2023
ASEAN	43.0%	38.9%	57.0%	61.1%
Brunei	64.2%	55.0%	35.8%	45.0%
Cambodia	81.5%	26.9%	18.5%	73.1%
Indonesia	44.3%	53.7%	55.7%	46.3%
Laos	81.8%	41.1%	18.2%	58.9%
Malaysia	43.0%	54.8%	57.0%	45.2%
Myanmar	8.0%	32.2%	92.0%	67.8%
Philippines	16.5%	21.2%	83.5%	78.8%
Singapore	22.1%	38.9%	77.9%	61.1%
Thailand	42.7%	43.1%	57.3%	56.9%
Vietnam	26.4%	22.1%	73.6%	77.9%

## BROADENING ASEAN'S STRATEGIC OPTIONS

The European Union (EU) and Japan continue to be in the leading positions for regional respondents in hedging against the uncertainties of the US-China strategic rivalry. 42.9% of the respondents chose the EU, followed by 26.6% for Japan. India, which was ranked last in 2022, doubled its ratings from 5.1% in 2022 to 11.3% in 2023 to take the third spot. This is followed by Australia (9.3%), the United Kingdom (6.8%), and the Republic of Korea (3.2%).

Among the six dialogue partners of ASEAN, only the EU and India saw an increase in their percentage share. The EU is the top choice for all regional countries, except for Myanmar and the Philippines, whose respondents favour Japan most. Cambodia respondents' support for the EU has increased considerably from 48.1% in 2022 to 79.9% in 2023.

Confidence in India increased across all ASEAN countries except for Cambodia. India's strategic autonomy coupled with key milestones such as the 30<sup>th</sup> anniversary of ASEAN-India dialogue relations in 2022 which led to an elevation to Comprehensive Strategic Partnership status, and India's G20 Presidency in 2023 are possible reasons creating greater visibility for the nation.



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

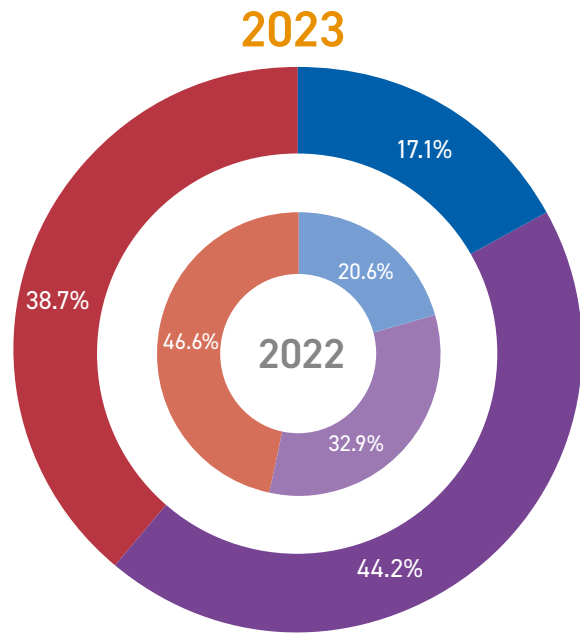
Country	Australia		The European Union		India		Japan		Republic of Korea		The United Kingdom	
	2022	2023	2022	2023	2022	2023	2022	2023	2022	2023	2022	2023
ASEAN	10.3%	9.3%	40.2%	42.9%	5.1%	11.3%	29.2%	26.6%	6.8%	3.2%	8.4%	6.8%
Brunei	20.8%	8.3%	30.2%	54.2%	0.0%	6.7%	20.8%	19.2%	9.4%	6.7%	18.9%	5.0%
Cambodia	6.2%	1.5%	48.1%	79.9%	9.9%	6.0%	13.6%	9.0%	8.6%	0.0%	13.6%	3.7%
Indonesia	10.7%	7.4%	40.5%	38.8%	3.8%	9.9%	31.3%	36.4%	6.9%	4.1%	6.9%	3.3%
Laos	4.5%	16.8%	36.4%	42.1%	2.3%	13.1%	47.7%	18.7%	6.8%	1.9%	2.3%	7.5%
Malaysia	5.9%	10.5%	49.6%	31.5%	6.7%	12.9%	23.0%	27.4%	6.7%	4.8%	8.1%	12.9%
Myanmar	6.3%	12.2%	46.0%	14.8%	1.7%	21.7%	26.6%	39.1%	11.4%	1.7%	8.0%	10.4%
Philippines	19.0%	7.1%	34.5%	33.3%	3.0%	4.0%	34.5%	39.4%	1.8%	4.0%	7.3%	12.1%
Singapore	9.9%	18.3%	39.2%	38.9%	5.0%	10.6%	35.1%	25.5%	5.9%	1.9%	5.0%	4.8%
Thailand	8.5%	6.3%	41.9%	42.4%	7.7%	16.0%	25.6%	21.5%	6.8%	6.9%	9.4%	6.9%
Vietnam	11.1%	4.4%	35.4%	52.9%	11.1%	11.8%	33.3%	29.4%	4.2%	0.0%	4.9%	1.5%



# THE FUTURE OF CHINA'S RELATIONS WITH REGIONAL COUNTRIES

Following the 20<sup>th</sup> Chinese Communist Party Congress and other recent geopolitical developments surrounding China, the largest group of Southeast Asian respondents (44.2%) view that their relations with China will remain the same. The number of respondents who expect their bilateral relations with China to improve or improve significantly decreased from 46.6% in 2022 to 38.7% in 2023. Lao respondents had the most significant decline in their optimism from 84.1% in 2022 to 28.0% in 2023. Cambodia respondents are the most positive with 77.6% expecting an improvement in their relations with China.

The number of respondents who chose "worsen" (11.9%) and "worsen significantly" (5.2%) has decreased from 2022, possibly due to China's proactive engagement with ASEAN countries. There is a significant shift of perceptions towards the status quo, especially among respondents from Laos.



## Q33 Following the 20<sup>th</sup> Chinese Communist Party Congress and other recent geopolitical developments, how do you see your country's relations with China evolving in the next three years?

Country	Worsen significantly		Worsen		Remain the same		Improve		Improve significantly	
	2022	2023	2022	2023	2022	2023	2022	2023	2022	2023
ASEAN	8.2%	5.2%	12.4%	11.9%	32.9%	44.2%	31.0%	30.4%	15.6%	8.3%
Brunei	0.0%	5.0%	5.7%	5.8%	20.8%	37.5%	52.8%	47.5%	20.8%	4.2%
Cambodia	6.2%	1.5%	0.0%	2.2%	9.9%	18.7%	42.0%	43.3%	42.0%	34.3%
Indonesia	3.1%	3.3%	11.5%	11.6%	32.1%	43.8%	39.7%	33.9%	13.7%	7.4%
Laos	2.3%	0.0%	2.3%	7.5%	11.4%	64.5%	38.6%	24.3%	45.5%	3.7%
Malaysia	6.7%	2.4%	11.9%	9.7%	43.7%	49.2%	29.6%	31.5%	8.1%	7.3%
Myanmar	40.6%	20.0%	25.4%	28.7%	23.7%	28.7%	7.7%	17.4%	2.6%	5.2%
Philippines	10.0%	9.1%	30.8%	24.2%	31.5%	38.4%	24.3%	24.2%	3.5%	4.0%
Singapore	4.1%	1.0%	12.2%	9.1%	61.7%	59.1%	19.8%	24.0%	2.3%	6.7%
Thailand	5.1%	2.8%	9.4%	6.9%	39.3%	47.2%	34.2%	33.3%	12.0%	9.7%
Vietnam	4.2%	6.6%	14.6%	13.2%	54.9%	55.1%	20.8%	24.3%	5.6%	0.7%

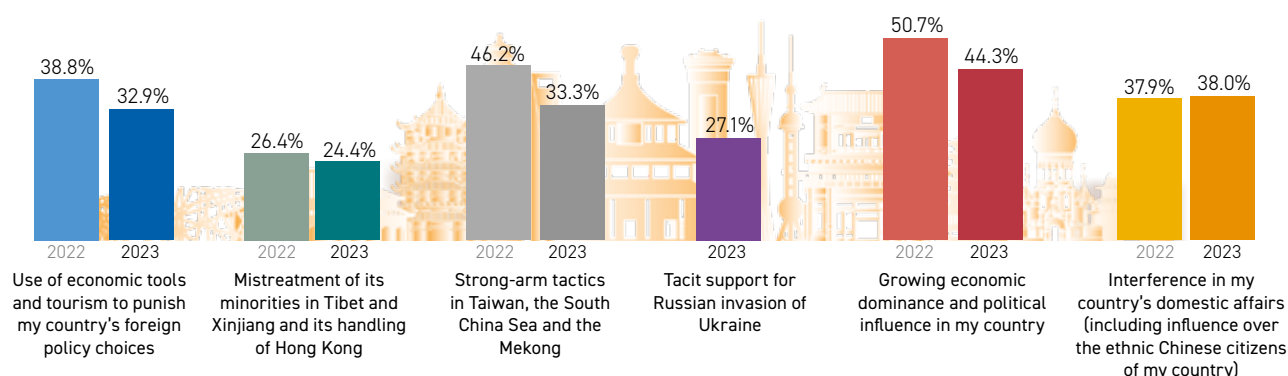
# THE FUTURE OF CHINA'S RELATIONS WITH REGIONAL COUNTRIES

Among those who believe future relations will improve, the largest group of respondents (44.3%) sees China's growing economic dominance and political influence in their countries as a potential problem. This view is the top choice for respondents from Cambodia (52.9%), Indonesia (44.0%), Malaysia (50.0%), Myanmar (61.5%), the Philippines (50.0%), and Thailand (62.9%).

The second top concern of this optimistic group (38.0%) is that "China's interference in my country's domestic affairs (including influence over the ethnic Chinese citizens of my country)". This is the top concern for respondents from Myanmar (57.7%). This is followed by concern over "China's strong-arm tactics in Taiwan, the South China Sea, and the Mekong" (33.3%) which is the top concern for respondents from Brunei (66.1%) and Malaysia (52.1%), both of whom are claimant states in the South China Sea.

Following closely behind as the fourth overall concern is "China's use of economic tools and tourism to punish my country's foreign policy choices" at 32.9%, which is the top concern for respondents from Singapore (56.3%) and Vietnam (50.0%). China's tacit support for the Russian invasion of Ukraine (which is a new option this year), ranked highly for Brunei respondents at 61.3%.

China's growing economic dominance and political influence in my country (50.7%) is the top concern for respondents from Brunei (66.1%) and Malaysia (52.1%), both of whom are claimant states in the South China Sea. This is followed by concern over "China's strong-arm tactics in Taiwan, the South China Sea, and the Mekong" (33.3%) which is the top concern for respondents from Brunei (66.1%) and Malaysia (52.1%), both of whom are claimant states in the South China Sea.



## Q34 What could potentially worsen your positive impression of China? (check 2 responses)

508 respondents who chose the "Improve" and "Improve significantly" options in Q33

Country	China's use of economic tools and tourism to punish my country's foreign policy choices		China's mistreatment of its minorities in Tibet and Xinjiang and its handling of Hong Kong		China's strong-arm tactics in Taiwan, the South China Sea and the Mekong		China's tacit support for Russian invasion of Ukraine	China's growing economic dominance and political influence in my country		China's interference in my country's domestic affairs (including influence over the ethnic Chinese citizens of my country)	
	2022	2023	2022	2023	2022	2023		2022	2023	2022	2023
<b>ASEAN</b>	38.8%	32.9%	26.4%	24.4%	46.2%	33.3%	27.1%	50.7%	44.3%	37.9%	38.0%
<b>Brunei</b>	23.1%	9.7%	46.2%	21.0%	56.4%	66.1%	61.3%	51.3%	27.4%	23.1%	14.5%
<b>Cambodia</b>	50.0%	21.2%	17.6%	26.0%	33.8%	19.2%	32.7%	50.0%	52.9%	48.5%	48.1%
<b>Indonesia</b>	28.6%	24.0%	41.4%	42.0%	48.6%	36.0%	14.0%	50.0%	44.0%	31.4%	40.0%
<b>Laos</b>	43.2%	43.3%	18.9%	16.7%	24.3%	20.0%	26.7%	75.7%	36.7%	37.8%	56.7%
<b>Malaysia</b>	49.0%	27.1%	17.6%	35.4%	56.9%	52.1%	16.7%	33.3%	50.0%	43.1%	18.8%
<b>Myanmar</b>	33.3%	26.9%	19.4%	19.2%	16.7%	7.7%	26.9%	69.4%	61.5%	61.1%	57.7%
<b>Philippines</b>	27.9%	28.6%	18.0%	17.9%	71.2%	32.1%	35.7%	55.0%	50.0%	27.9%	35.7%
<b>Singapore</b>	63.3%	56.3%	26.5%	17.2%	51.0%	34.4%	25.0%	18.4%	21.9%	40.8%	45.3%
<b>Thailand</b>	40.7%	41.9%	24.1%	16.1%	48.1%	27.4%	17.7%	53.7%	62.9%	33.3%	33.9%
<b>Vietnam</b>	28.9%	50.0%	34.2%	32.4%	55.3%	38.2%	14.7%	50.0%	35.3%	31.6%	29.4%

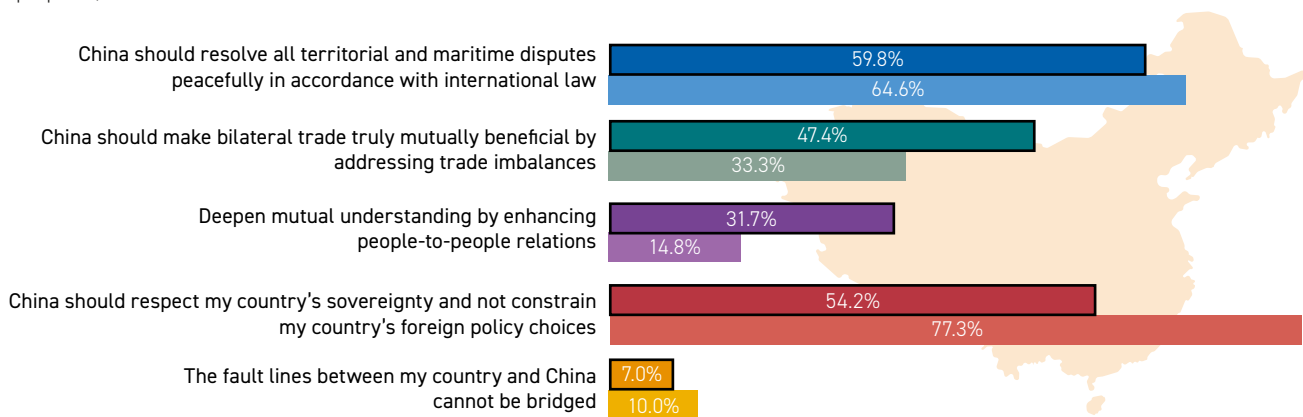
# THE FUTURE OF CHINA'S RELATIONS WITH REGIONAL COUNTRIES

The top desire for regional respondents with a pessimistic view of relations (59.8%) is for China to resolve all territorial and maritime disputes peacefully in accordance with international law although this option recorded a slight decline from 64.6% the year before. This is the top choice for Indonesia, Malaysia, the Philippines, Singapore, and Vietnam — all of whom (except Singapore) have competing claims with China in the South China Sea.

A close second sentiment for this group of respondents (54.2%) is "China should respect my country's sovereignty and not constrain my country's foreign policy choices". This is the top choice for respondents from Brunei, and Malaysia (tied with the top option).

The third-ranked option "China should make bilateral trade mutually beneficial by addressing trade imbalances" at 47.4% is the top preference for respondents from Cambodia, Myanmar, and Thailand. This option saw a 14 percentage point jump from 33.3% in 2022.

There is a significant increase in preference for China to deepen mutual understanding by enhancing people-to-people relations from 14.8% in 2022 to 31.7% in 2023. This option is the top choice for respondents from Laos and has seen a considerable increase in percentage points from respondents in Brunei, Cambodia, and Myanmar.



## Q35 What can China do to improve relations with your country? (check 2 responses)

210 respondents who chose the "Worsen" and "Worsen significantly" options in Q33

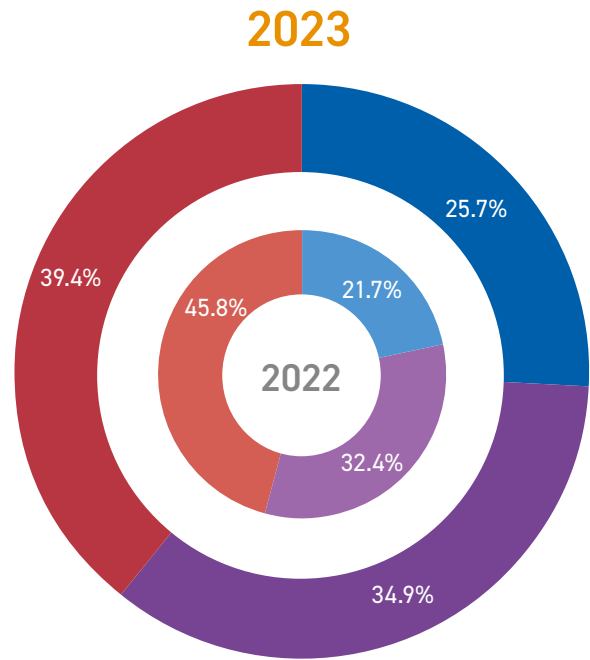
Country	China should resolve all territorial and maritime disputes peacefully in accordance with international law		China should make bilateral trade truly mutually beneficial by addressing trade imbalances		Deepen mutual understanding by enhancing people-to-people relations		China should respect my country's sovereignty and not constrain my country's foreign policy choices		The fault lines between my country and China cannot be bridged	
	2022	2023	2022	2023	2022	2023	2022	2023	2022	2023
ASEAN	64.6%	59.8%	33.3%	47.4%	14.8%	31.7%	77.3%	54.2%	10.0%	7.0%
Brunei	66.7%	38.5%	33.3%	23.1%	0.0%	46.2%	100.0%	61.5%	0.0%	30.8%
Cambodia	80.0%	20.0%	20.0%	80.0%	20.0%	40.0%	80.0%	60.0%	0.0%	0.0%
Indonesia	63.2%	72.2%	52.6%	61.1%	15.8%	11.1%	57.9%	55.6%	10.5%	0.0%
Laos	50.0%	12.5%	50.0%	50.0%	0.0%	75.0%	100.0%	37.5%	0.0%	25.0%
Malaysia	52.0%	73.3%	36.0%	33.3%	28.0%	20.0%	72.0%	73.3%	12.0%	0.0%
Myanmar	42.9%	60.7%	29.0%	75.0%	26.8%	51.8%	74.0%	12.5%	27.3%	0.0%
Philippines	94.5%	84.8%	19.6%	33.3%	4.9%	9.1%	79.1%	66.7%	1.8%	6.1%
Singapore	72.2%	85.7%	13.9%	23.8%	25.0%	23.8%	80.6%	61.9%	8.3%	4.8%
Thailand	35.3%	57.1%	52.9%	64.3%	23.5%	28.6%	70.6%	50.0%	17.6%	0.0%
Vietnam	88.9%	92.6%	25.9%	29.6%	3.7%	11.1%	59.3%	63.0%	22.2%	3.7%

# ASSESSING US ENGAGEMENT IN THE REGION

More than a third (39.4%) of respondents perceive that the level of US engagement with Southeast Asia has increased or increased significantly. Although this is the prevailing opinion, there is a decrease in the expectation (-6.4%) compared to 2022. This optimism is expressed by respondents from Brunei, Cambodia, the Philippines, and Singapore. The most significant increase is among Cambodian respondents from 27.2% to 74.6% and the most significant decrease in optimism is Myanmar, falling from 56.5% to 17.4%.

A significant percentage of respondents (34.9%) viewed that the level of US engagement with Southeast Asia has remained unchanged, considering that the Biden's Administration is at its midterm mark. This is a slight increase from 2022 and is the top choice for respondents from Indonesia and Laos.

There is a slight increase in percentage of respondents who are less optimistic (choosing decreased significantly/decreased) from 21.7% in 2022 to 25.7% in 2023. This is the predominant view among respondents from Myanmar, Thailand, and Vietnam. There is however a significant decline in pessimism regarding the level of US engagement among respondents from Cambodia and Laos, possibly due to President Biden's visit to Cambodia in November and the special ASEAN-US Summit in May last year.



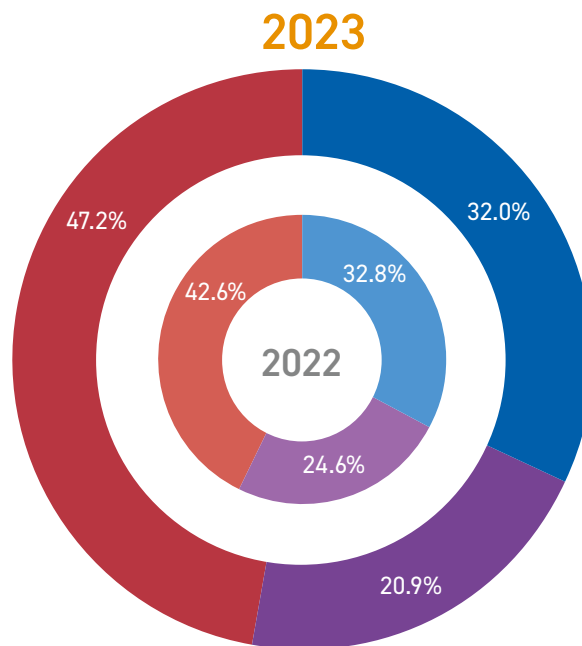
## Q36 At the mid-term mark of the Biden Administration, the level of US engagement with Southeast Asia has...

Country	Decreased significantly		Decreased		Remained unchanged		Increased		Increased significantly	
	2022	2023	2022	2023	2022	2023	2022	2023	2022	2023
<b>ASEAN</b>	5.6%	4.7%	16.1%	21.0%	32.4%	34.9%	38.9%	33.6%	6.9%	5.8%
<b>Brunei</b>	1.9%	2.5%	11.3%	9.2%	34.0%	39.2%	47.2%	42.5%	5.7%	6.7%
<b>Cambodia</b>	14.8%	1.5%	23.5%	3.0%	34.6%	20.9%	23.5%	45.5%	3.7%	29.1%
<b>Indonesia</b>	4.6%	5.0%	17.6%	16.5%	40.5%	47.1%	32.8%	29.8%	4.6%	1.7%
<b>Laos</b>	6.8%	0.9%	15.9%	9.3%	34.1%	61.7%	43.2%	27.1%	0.0%	0.9%
<b>Malaysia</b>	6.7%	1.6%	13.3%	25.0%	40.7%	36.3%	31.9%	33.9%	7.4%	3.2%
<b>Myanmar</b>	3.4%	12.2%	12.0%	53.0%	28.0%	17.4%	45.4%	15.7%	11.1%	1.7%
<b>Philippines</b>	6.0%	4.0%	22.0%	17.2%	37.0%	31.3%	30.0%	44.4%	5.0%	3.0%
<b>Singapore</b>	2.7%	2.4%	9.0%	12.0%	27.5%	35.6%	47.3%	43.3%	13.5%	6.7%
<b>Thailand</b>	4.3%	6.9%	12.0%	26.4%	29.9%	34.0%	41.0%	27.8%	12.8%	4.9%
<b>Vietnam</b>	4.9%	9.6%	24.3%	38.2%	18.1%	25.7%	47.2%	26.5%	5.6%	0.0%

# IS THE US A RELIABLE STRATEGIC PARTNER?

47.2% of respondents are confident or very confident of the US as a strategic partner and provider of regional security – an increase from 42.6% in 2022. This follows a series of high-level summits in Washington D.C. and Phnom Penh between President Biden and the ASEAN leaders, as well as several new security initiatives for the region as part of the 45<sup>th</sup> anniversary of ASEAN-US dialogue relations in 2022. Respondents from Brunei, Cambodia, Laos, Malaysia, Myanmar, the Philippines, and Thailand expressed confidence as their top choice.

Similar to the findings in 2022, 32.0% of respondents expressed little or no confidence. However, there is a shift in positions among regional countries with more respondents from Indonesia, Singapore, and Vietnam choosing this option as their top choice (instead of Cambodia and Brunei in 2022).



## Q37 How confident are you of the US as a strategic partner and provider of regional security?

Country	No Confidence		Little Confidence		No Comment		Confident		Very Confident	
	2022	2023	2022	2023	2022	2023	2022	2023	2022	2023
<b>ASEAN</b>	6.4%	6.4%	26.4%	25.6%	24.6%	20.9%	34.7%	35.6%	7.9%	11.6%
<b>Brunei</b>	5.7%	2.5%	43.4%	14.2%	24.5%	40.8%	24.5%	34.2%	1.9%	8.3%
<b>Cambodia</b>	9.9%	1.5%	27.2%	13.4%	29.6%	8.2%	23.5%	49.3%	9.9%	27.6%
<b>Indonesia</b>	6.1%	13.2%	30.5%	38.0%	23.7%	17.4%	35.1%	28.9%	4.6%	2.5%
<b>Laos</b>	11.4%	0.9%	27.3%	11.2%	50.0%	39.3%	11.4%	47.7%	0.0%	0.9%
<b>Malaysia</b>	9.6%	2.4%	24.4%	33.9%	22.2%	22.6%	31.1%	36.3%	12.6%	4.8%
<b>Myanmar</b>	4.3%	21.7%	11.1%	15.7%	23.4%	9.6%	42.3%	11.3%	18.9%	41.7%
<b>Philippines</b>	4.0%	3.0%	25.3%	25.3%	13.3%	9.1%	50.0%	51.5%	7.5%	11.1%
<b>Singapore</b>	4.5%	6.7%	28.4%	36.5%	18.0%	17.8%	41.0%	32.7%	8.1%	6.3%
<b>Thailand</b>	4.3%	4.9%	30.8%	37.5%	18.8%	13.9%	38.5%	33.3%	7.7%	10.4%
<b>Vietnam</b>	4.2%	6.6%	16.0%	30.1%	22.2%	30.1%	50.0%	30.9%	7.6%	2.2%

## SECTION V: Perceptions of Trust

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

### CHINA

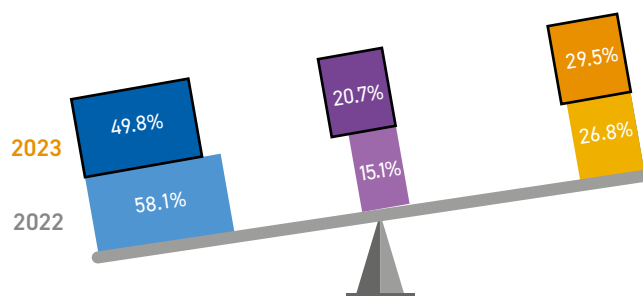
Close to half of respondents (49.8%) have either “little confidence” (30.8%) or “no confidence” (19.0%) in China to “do the right thing” to contribute to global peace, security, prosperity and governance. Only 29.5% are either “confident” or “very confident” that China will step up to the plate. Overall, the percentage of distrust of China has dwindled from 58.1% in 2022 to 49.8% this year.

Among those who trust China, 47.6% attribute this to China’s “vast economic resources and strong political will to provide global leadership”. 18.7% agree that China is a responsible stakeholder that respects and champions international law. Meanwhile, 12.7% agree that China’s military power is an asset for global security and another 12.7% think that their country’s political culture and worldviews are compatible with China’s. Only 8.3% think that the 20<sup>th</sup> Chinese Communist Party Congress (CCPC) has made China stronger and more stable (new option).

Levels of distrust towards China are higher than levels of trust in all ASEAN member states, except Brunei, Cambodia, and Laos. The distrust levels are most pronounced in Myanmar (80.0%), Vietnam (78.7%), the Philippines (62.7%), Indonesia (57.8%), Thailand (56.9%), and Singapore (56.3%). Meanwhile, the share of

distrust towards China in Laos is only 16.8%, significantly lower than the ASEAN average of 49.8%.

Among those who distrust China, 41.4% think that China’s economic and military power can be used to threaten their country’s interest and sovereignty. This view is shared strongly in Vietnam (65.4%), the Philippines (62.9%), Cambodia (44.0%), Malaysia (41.7%), Indonesia (35.7%), and Singapore (35.0%). Among this group, 26.6% think that China is not a reliable power, followed by 12.7% who feel that China’s future stability has become more uncertain after the 20<sup>th</sup> CCPC. Another 11.3% express worry that China is distracted with its internal affairs.



### Q38 How confident are you that China will “do the right thing” to contribute to global peace, security, prosperity, and governance?

Country	No Confidence		Little Confidence		No Comment		Confident		Very Confident	
	2022	2023	2022	2023	2022	2023	2022	2023	2022	2023
<b>ASEAN</b>	24.8%	19.0%	33.3%	30.8%	15.1%	20.7%	20.1%	25.3%	6.7%	4.2%
Brunei	7.5%	5.0%	60.4%	16.7%	15.1%	17.5%	17.0%	59.2%	0.0%	1.7%
Cambodia	8.6%	2.2%	8.6%	16.4%	8.6%	27.6%	44.4%	43.3%	29.6%	10.4%
Indonesia	12.2%	19.8%	38.9%	38.0%	19.8%	19.8%	21.4%	16.5%	7.6%	5.8%
Laos	4.5%	0.9%	36.4%	15.9%	34.1%	39.3%	22.7%	40.2%	2.3%	3.7%
Malaysia	20.0%	8.9%	31.1%	39.5%	11.9%	22.6%	28.9%	28.2%	8.1%	0.8%
Myanmar	77.1%	53.9%	11.7%	26.1%	9.4%	12.2%	1.7%	7.0%	0.0%	0.9%
Philippines	31.5%	26.3%	50.5%	36.4%	9.3%	16.2%	8.8%	15.2%	0.0%	6.1%
Singapore	35.6%	15.9%	34.2%	40.4%	14.0%	15.9%	14.9%	21.2%	1.4%	6.7%
Thailand	21.4%	20.1%	26.5%	36.8%	17.9%	18.8%	24.8%	18.8%	9.4%	5.6%
Vietnam	29.9%	36.8%	34.7%	41.9%	11.1%	16.9%	16.0%	3.7%	8.3%	0.7%



## Q39 Why do you trust China?

384 respondents who chose the "Confident" and "Very Confident" options in Q38

Country	China has vast economic resources and the political will to provide global leadership		My country's political culture and worldview are compatible with the China's		China is a responsible stakeholder that respects and champions international law		China's military power is an asset for global peace and security		I respect China and admire its civilisation and culture	The 20 <sup>th</sup> Chinese Communist Party Congress has made China stronger and more stable
	2022	2023	2022	2023	2022	2023	2022	2023	2022	2023
ASEAN	43.8%	47.6%	15.7%	12.7%	13.6%	18.7%	13.1%	12.7%	13.8%	8.3%
Brunei	88.9%	39.7%	0.0%	5.5%	0.0%	39.7%	0.0%	9.6%	11.1%	5.5%
Cambodia	30.0%	19.4%	18.3%	27.8%	23.3%	13.9%	18.3%	26.4%	10.0%	12.5%
Indonesia	26.3%	81.5%	5.3%	0.0%	15.8%	11.1%	21.1%	7.4%	31.6%	0.0%
Laos	27.3%	36.2%	45.5%	14.9%	9.1%	10.6%	9.1%	27.7%	9.1%	10.6%
Malaysia	42.0%	69.4%	6.0%	0.0%	30.0%	13.9%	10.0%	11.1%	12.0%	5.6%
Myanmar	50.0%	66.7%	33.3%	22.2%	0.0%	0.0%	0.0%	11.1%	16.7%	0.0%
Philippines	62.9%	38.1%	5.7%	19.0%	5.7%	23.8%	2.9%	19.0%	22.9%	0.0%
Singapore	50.0%	43.1%	19.4%	17.2%	11.1%	20.7%	5.6%	12.1%	13.9%	6.9%
Thailand	35.0%	48.6%	12.5%	20.0%	15.0%	20.0%	30.0%	2.9%	7.5%	8.6%
Vietnam	25.7%	33.3%	11.4%	0.0%	25.7%	33.3%	34.3%	0.0%	2.9%	33.3%

## Q40 Why do you distrust China?

659 respondents who chose the "Little Confidence" and "No Confidence" options in Q38

Country	China does not have the capacity or political will for global leadership	China's future stability has become more uncertain after the 20 <sup>th</sup> Chinese Communist Party Congress	My country's political culture and worldview are incompatible with China's		I am concerned that China is distracted with its internal affairs and thus cannot focus on global concerns and issues		China's economic and military power could be used to threaten my country's interests and sovereignty.		I do not consider China a reliable power	
	2022	2023	2022	2023	2022	2023	2022	2023	2022	2023
ASEAN	8.4%	12.7%	7.6%	7.9%	11.4%	11.3%	49.6%	41.4%	23.0%	26.6%
Brunei	2.8%	26.9%	11.1%	15.4%	8.3%	15.4%	50.0%	23.1%	27.8%	19.2%
Cambodia	7.1%	20.0%	0.0%	4.0%	14.3%	16.0%	71.4%	44.0%	7.1%	16.0%
Indonesia	4.5%	14.3%	13.4%	15.7%	28.4%	12.9%	40.3%	35.7%	13.4%	21.4%
Laos	16.7%	11.1%	11.1%	5.6%	16.7%	11.1%	38.9%	33.3%	16.7%	38.9%
Malaysia	11.6%	20.0%	7.2%	8.3%	8.7%	15.0%	49.3%	41.7%	23.2%	15.0%
Myanmar	14.1%	3.3%	7.1%	5.4%	5.5%	5.4%	47.9%	31.5%	25.4%	54.3%
Philippines	4.0%	8.1%	4.9%	8.1%	2.7%	4.8%	70.7%	62.9%	17.7%	16.1%
Singapore	8.4%	10.3%	3.9%	10.3%	5.8%	11.1%	38.1%	35.0%	43.9%	33.3%
Thailand	10.7%	8.5%	10.7%	3.7%	16.1%	15.9%	39.3%	41.5%	23.2%	30.5%
Vietnam	4.3%	4.7%	6.5%	2.8%	7.5%	5.6%	50.5%	65.4%	31.2%	21.5%

## THE EUROPEAN UNION

The European Union's trust rating has remained strong and increased moderately this year. The number of respondents having confidence in the EU to "do the right thing" has risen from 48.5% in 2022 to 51.0% this year but the share of distrust has also increased. The highest levels of trust towards the EU are shared strongly by respondents from Cambodia (86.6%), Laos (65.5%), the Philippines (61.6%), Vietnam (58.8%), and Thailand (52.7%). Myanmar, in particular, sees a big decline in its trust towards the EU from 58.5% in 2022 to 16.5% this year. Myanmar and Indonesia are the only countries where the distrust level outstripped the trust level.

The region's positive view towards the EU is largely attributed to its leadership in championing human rights and climate change which is considered an asset for global peace and security (38.1%). This view is more pronounced in Cambodia (46.6%), Malaysia (44.1%), Brunei (43.6%), Laos (42.9%), and Thailand (42.1%). Among this cohort, 30.9% also think that the EU is a responsible stakeholder that respects and champions international law (no change from 2022).

In the group of EU sceptics, 33.4% express concern that the EU does not have the capacity or political will for global leadership, an increase from 26.7% in 2022. This view is shared strongly by respondents from Vietnam (60.0%), Singapore (52.9%), Cambodia (46.7%), and Brunei (34.8%).



### Q41 How confident are you that the EU will “do the right thing” to contribute to global peace, security, prosperity, and governance?

Country	No Confidence		Little Confidence		No Comment		Confident		Very Confident	
	2022	2023	2022	2023	2022	2023	2022	2023	2022	2023
<b>ASEAN</b>	4.9%	5.2%	21.2%	23.9%	25.4%	19.9%	42.0%	40.3%	6.5%	10.7%
<b>Brunei</b>	9.4%	3.3%	28.3%	15.8%	32.1%	48.3%	28.3%	21.7%	1.9%	10.8%
<b>Cambodia</b>	3.7%	0.7%	12.3%	10.4%	24.7%	2.2%	58.0%	36.6%	1.2%	50.0%
<b>Indonesia</b>	6.1%	12.4%	24.4%	35.5%	26.0%	14.9%	40.5%	33.1%	3.1%	4.1%
<b>Laos</b>	2.3%	0.9%	20.5%	5.6%	45.5%	28.0%	27.3%	63.6%	4.5%	1.9%
<b>Malaysia</b>	4.4%	4.0%	20.7%	27.4%	17.0%	21.0%	43.7%	40.3%	14.1%	7.3%
<b>Myanmar</b>	3.4%	15.7%	16.3%	46.1%	21.7%	21.7%	49.4%	14.8%	9.1%	1.7%
<b>Philippines</b>	3.5%	2.0%	24.3%	22.2%	12.5%	14.1%	50.8%	51.5%	9.0%	10.1%
<b>Singapore</b>	5.4%	5.8%	25.7%	27.9%	24.8%	15.4%	35.6%	41.8%	8.6%	9.1%
<b>Thailand</b>	7.7%	2.8%	23.1%	26.4%	24.8%	18.1%	38.5%	44.4%	6.0%	8.3%
<b>Vietnam</b>	2.8%	4.4%	16.7%	21.3%	25.0%	15.4%	47.9%	55.1%	7.6%	3.7%



## Q42 Why do you trust the EU?

671 respondents who chose the "Confident" and "Very Confident" options in Q41

Country	The EU has vast economic resources and the political will to provide global leadership		My country's political culture and worldview are compatible with the EU's		The EU is a responsible stakeholder that respects and champions international law		The EU's military power is an asset for global peace and security		I respect Europe and admire its civilisation and culture	
	2022	2023	2022	2023	2022	2023	2022	2023	2022	2023
ASEAN	19.4%	19.1%	4.5%	6.4%	30.9%	30.9%	38.4%	38.1%	6.8%	5.4%
Brunei	25.0%	15.4%	0.0%	17.9%	6.3%	12.8%	62.5%	43.6%	6.3%	10.3%
Cambodia	22.9%	7.8%	10.4%	3.4%	31.3%	33.6%	31.3%	46.6%	4.2%	8.6%
Indonesia	21.1%	24.4%	3.5%	2.2%	29.8%	28.9%	42.1%	40.0%	3.5%	4.4%
Laos	21.4%	20.0%	7.1%	7.1%	28.6%	25.7%	35.7%	42.9%	7.1%	4.3%
Malaysia	12.8%	11.9%	2.6%	8.5%	44.9%	30.5%	29.5%	44.1%	10.3%	5.1%
Myanmar	27.3%	26.3%	4.4%	0.0%	18.5%	47.4%	36.6%	26.3%	13.2%	0.0%
Philippines	20.5%	29.5%	2.5%	6.6%	35.6%	24.6%	37.7%	31.1%	3.8%	8.2%
Singapore	9.2%	12.3%	2.0%	5.7%	49.0%	44.3%	34.7%	33.0%	5.1%	4.7%
Thailand	15.4%	19.7%	9.6%	9.2%	25.0%	28.9%	44.2%	42.1%	5.8%	0.0%
Vietnam	18.8%	23.8%	2.5%	3.8%	40.0%	32.5%	30.0%	31.3%	8.8%	8.8%

## Q43 Why do you distrust the EU?

384 respondents who chose the "Little Confidence" and "No Confidence" options in Q41

Country	The EU does not have the capacity or political will for global leadership		My country's political culture and worldview are incompatible with the EU's		I am concerned that the EU is distracted with its internal affairs and thus cannot focus on global concerns and issues		The EU's stance on environment, human rights, and climate change could be used to threaten my country's interest and sovereignty		I do not consider the EU a reliable power	
	2022	2023	2022	2023	2022	2023	2022	2023	2022	2023
ASEAN	26.7%	33.4%	12.4%	9.2%	30.1%	29.4%	17.7%	14.5%	13.1%	13.5%
Brunei	25.0%	34.8%	10.0%	13.0%	25.0%	30.4%	5.0%	8.7%	35.0%	13.0%
Cambodia	0.0%	46.7%	0.0%	13.3%	46.2%	26.7%	38.5%	6.7%	15.4%	6.7%
Indonesia	25.0%	22.4%	12.5%	10.3%	32.5%	20.7%	17.5%	29.3%	12.5%	17.2%
Laos	20.0%	28.6%	50.0%	0.0%	20.0%	28.6%	10.0%	14.3%	0.0%	28.6%
Malaysia	35.3%	25.6%	2.9%	7.7%	26.5%	25.6%	20.6%	23.1%	14.7%	17.9%
Myanmar	33.3%	15.5%	14.5%	18.3%	30.4%	38.0%	2.9%	9.9%	18.8%	18.3%
Philippines	18.9%	16.7%	9.0%	16.7%	38.7%	37.5%	19.8%	25.0%	13.5%	4.2%
Singapore	59.4%	52.9%	2.9%	1.4%	27.5%	25.7%	4.3%	5.7%	5.8%	14.3%
Thailand	11.1%	31.0%	11.1%	2.4%	36.1%	40.5%	33.3%	16.7%	8.3%	9.5%
Vietnam	39.3%	60.0%	10.7%	8.6%	17.9%	20.0%	25.0%	5.7%	7.1%	5.7%

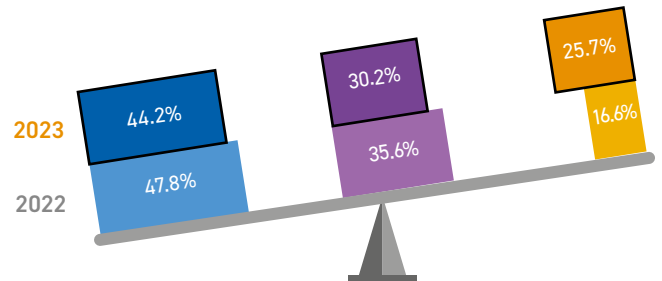
# INDIA

India has enjoyed a significant increase in trust levels this year (25.7%) compared to last year (16.6%). But doubts about India are still pronounced overall (44.2%), especially in Myanmar (66.1%), Brunei (55.9%), Indonesia (53.7%), Cambodia (52.3%), Singapore (50.5%), and Thailand (45.1%). Meanwhile, the Philippines is the only country whose level of trust (40.5%) outstripped the level of distrust (38.4%).

Of the cohort that trusts India, 25.4% (a decline from 37.1% in 2022) believe that it is a responsible stakeholder that respects and champions international law. This view is shared strongly in Vietnam (43.5%), Brunei (35.0%), and Singapore (34.0%). What is surprising is the three-fold increase from 6.6% in 2022 to 18.2% in 2023 in the confidence that India's military power is an asset for global peace and security.

Among those who distrust India, 34.6% believe that India is distracted with its internal and sub-continental affairs and thus cannot focus on global concerns. This view is more pronounced

in Brunei (76.1%), the Philippines (44.7%), Vietnam (40.4%), and Thailand (35.4%). An almost equal proportion of respondents (33.6%) also raise concerns that India does not have the capacity or political will for global leadership.



## Q44 How confident are you that India will “do the right thing” to contribute to global peace, security, prosperity, and governance?

Country	No Confidence		Little Confidence		No Comment		Confident		Very Confident	
	2022	2023	2022	2023	2022	2023	2022	2023	2022	2023
ASEAN	20.0%	12.1%	27.8%	32.1%	35.6%	30.2%	16.0%	22.7%	0.6%	3.0%
Brunei	20.8%	5.8%	35.8%	50.1%	35.8%	10.8%	7.5%	25.0%	0.0%	8.3%
Cambodia	21.0%	14.2%	19.8%	38.1%	42.0%	38.1%	17.3%	8.2%	0.0%	1.5%
Indonesia	20.6%	19.8%	33.6%	33.9%	35.9%	22.3%	9.9%	21.5%	0.0%	2.5%
Laos	25.0%	0.9%	4.5%	4.7%	59.1%	66.4%	11.4%	27.1%	0.0%	0.9%
Malaysia	28.1%	8.9%	28.1%	30.6%	23.7%	35.5%	17.8%	21.0%	2.2%	4.0%
Myanmar	22.9%	36.5%	32.0%	29.6%	36.6%	22.6%	7.7%	9.6%	0.9%	1.7%
Philippines	6.5%	3.0%	28.8%	35.4%	29.5%	21.2%	33.5%	35.4%	1.8%	5.1%
Singapore	26.1%	14.9%	41.0%	35.6%	25.7%	25.5%	6.8%	21.2%	0.5%	2.9%
Thailand	23.1%	12.5%	29.1%	32.6%	29.1%	27.8%	17.9%	25.0%	0.9%	2.1%
Vietnam	5.6%	4.4%	25.7%	30.1%	38.9%	31.6%	29.9%	33.1%	0.0%	0.7%

## Q45 Why do you trust India?

331 respondents who chose the "Confident" and "Very Confident" options in Q44

Country	India has vast economic resources and the political will to provide global leadership		My country's political culture and worldview are compatible with India's		India is a responsible stakeholder that respects and champions international law		India's military power is an asset for global peace and security		I respect India and admire its civilisation and culture	
	2022	2023	2022	2023	2022	2023	2022	2023	2022	2023
ASEAN	20.2%	22.0%	17.1%	16.2%	37.1%	25.4%	6.6%	18.2%	19.0%	18.2%
Brunei	50.0%	2.5%	25.0%	17.5%	25.0%	35.0%	0.0%	27.5%	0.0%	17.5%
Cambodia	21.4%	38.5%	14.3%	0.0%	57.1%	15.4%	0.0%	38.5%	7.1%	7.7%
Indonesia	7.7%	31.0%	38.5%	13.8%	38.5%	31.0%	0.0%	3.4%	15.4%	20.7%
Laos	20.0%	3.3%	0.0%	20.0%	40.0%	10.0%	0.0%	33.3%	40.0%	33.3%
Malaysia	14.8%	32.3%	7.4%	9.7%	37.0%	19.4%	14.8%	9.7%	25.9%	29.0%
Myanmar	23.3%	30.8%	20.0%	38.5%	23.3%	15.4%	3.3%	7.7%	30.0%	7.7%
Philippines	13.5%	30.0%	11.3%	10.0%	34.8%	25.0%	20.6%	12.5%	19.9%	22.5%
Singapore	12.5%	22.0%	6.3%	12.0%	43.8%	34.0%	0.0%	10.0%	37.5%	22.0%
Thailand	18.2%	20.5%	27.3%	25.6%	36.4%	25.6%	13.6%	17.9%	4.5%	10.3%
Vietnam	20.9%	8.7%	20.9%	15.2%	34.9%	43.5%	14.0%	21.7%	9.3%	10.9%

## Q46 Why do you distrust India?

588 respondents who chose the "Little Confidence" and "No Confidence" options in Q44

Country	India does not have the capacity or political will for global leadership		My country's political culture and worldview are incompatible with India's		I am concerned that India is distracted with its internal affairs and thus cannot focus on global concerns and issues		India's economic and military power could be used to threaten my country's interests and sovereignty		I do not consider India a reliable power	
	2022	2023	2022	2023	2022	2023	2022	2023	2022	2023
ASEAN	38.0%	33.6%	6.5%	4.8%	32.4%	34.6%	1.9%	6.3%	21.1%	20.7%
Brunei	20.0%	1.5%	3.3%	9.0%	36.7%	76.1%	0.0%	9.0%	40.0%	4.5%
Cambodia	45.5%	45.7%	15.2%	1.4%	18.2%	4.3%	3.0%	2.9%	18.2%	45.7%
Indonesia	40.8%	44.6%	5.6%	3.1%	29.6%	30.8%	2.8%	3.1%	21.1%	18.5%
Laos	38.5%	16.7%	7.7%	0.0%	38.5%	33.3%	0.0%	33.3%	15.4%	16.7%
Malaysia	34.2%	46.9%	7.9%	4.1%	26.3%	28.6%	1.3%	2.0%	30.3%	18.4%
Myanmar	36.5%	11.8%	8.9%	9.2%	25.0%	22.4%	4.7%	2.6%	25.0%	53.9%
Philippines	33.3%	34.2%	5.7%	7.9%	44.0%	44.7%	2.8%	2.6%	14.2%	10.5%
Singapore	39.6%	48.6%	0.7%	2.9%	38.9%	30.5%	0.0%	0.0%	20.8%	18.1%
Thailand	41.0%	47.7%	8.2%	1.5%	29.5%	35.4%	1.6%	3.1%	19.7%	12.3%
Vietnam	51.1%	38.3%	2.2%	8.5%	37.8%	40.4%	2.2%	4.3%	6.7%	8.5%

# JAPAN

Japan remains the most trusted major power in the region with the overall trust level of 54.5%. Japan is most trusted in Brunei (79.2%), the Philippines (75.7%), Vietnam (64.7%), and Thailand (57.7%). The largest improvement in trust towards Japan is found in Brunei with an increase of 22.6% compared with last year. Interestingly, Cambodia is the only country whose level of distrust (50.7%) outstripped the level of trust (18.7%).

Among those who believe in Japan, 41.0% think that Japan is a "responsible stakeholder that respects and champions international law", a decline from 46.6% in 2022. This perception is widely shared among respondents from Singapore (62.5%), Thailand (49.4%), Indonesia (49.2%), Vietnam (47.7%), and Brunei (41.1%). A proportion (26.4%) in this cohort also believe that "Japan has vast economic resources and the political will to provide global leadership", particularly among those from Cambodia (48.0%). Confidence in Japan's military power as an asset for global peace and security increased from 2.6% to 7.2%.

The prevailing sceptics view that "Japan is consumed with its internal affairs and relations with its Northeast Asian neighbours and thus cannot focus on global concerns" has

increased from 27.2% to 38.6%. This is true among respondents from Thailand (59.3%), Brunei (56.3%), Indonesia (47.4%), and Singapore (43.3%). In this cohort, 32.5% also think that "Japan does not have the capacity or political will for global leadership".



## Q47 How confident are you that Japan will “do the right thing” to contribute to global peace, security, prosperity, and governance?

Country	No Confidence		Little Confidence		No Comment		Confident		Very Confident	
	2022	2023	2022	2023	2022	2023	2022	2023	2022	2023
<b>ASEAN</b>	6.0%	7.6%	15.8%	17.9%	24.1%	20.0%	44.5%	42.2%	9.7%	12.3%
<b>Brunei</b>	1.9%	2.5%	22.6%	10.8%	18.9%	7.5%	49.1%	66.7%	7.5%	12.5%
<b>Cambodia</b>	19.8%	41.0%	19.8%	9.7%	28.4%	30.6%	24.7%	14.2%	7.4%	4.5%
<b>Indonesia</b>	4.6%	4.1%	15.3%	27.3%	24.4%	14.9%	48.9%	41.3%	6.9%	12.4%
<b>Laos</b>	4.5%	0.0%	4.5%	4.7%	45.5%	42.1%	40.9%	48.6%	4.5%	4.7%
<b>Malaysia</b>	9.6%	3.2%	21.5%	18.5%	18.5%	24.2%	43.0%	41.1%	7.4%	12.9%
<b>Myanmar</b>	4.9%	13.0%	14.6%	40.0%	22.6%	12.2%	46.3%	32.2%	11.7%	2.6%
<b>Philippines</b>	0.3%	1.0%	9.5%	15.2%	8.0%	8.1%	57.3%	44.4%	25.0%	31.3%
<b>Singapore</b>	4.5%	6.3%	23.0%	22.6%	21.2%	17.3%	42.8%	42.8%	8.6%	11.1%
<b>Thailand</b>	7.7%	0.7%	14.5%	18.1%	31.6%	23.6%	40.2%	43.8%	6.0%	13.9%
<b>Vietnam</b>	2.1%	4.4%	12.5%	11.8%	21.5%	19.1%	52.1%	47.1%	11.8%	17.6%

## Q48 Why do you trust Japan?

707 respondents who chose the "Confident" and "Very Confident" options in Q47

Country	Japan has vast economic resources and the political will to provide global leadership		My country's political culture and worldview are compatible with the Japan's		Japan is a responsible stakeholder that respects and champions international law		Japan's military power is an asset for global peace and security		I respect Japan and admire its civilisation and culture	
	2022	2023	2022	2023	2022	2023	2022	2023	2022	2023
ASEAN	25.8%	26.4%	6.3%	8.4%	46.6%	41.0%	2.6%	7.2%	18.7%	17.0%
Brunei	30.0%	30.5%	0.0%	9.5%	50.0%	41.1%	0.0%	13.7%	20.0%	5.3%
Cambodia	26.9%	48.0%	19.2%	4.0%	30.8%	36.0%	3.8%	8.0%	19.2%	4.0%
Indonesia	31.5%	32.3%	9.6%	4.6%	41.1%	49.2%	4.1%	1.5%	13.7%	12.3%
Laos	30.0%	17.5%	0.0%	22.8%	55.0%	10.5%	0.0%	8.8%	15.0%	40.4%
Malaysia	16.2%	23.9%	4.4%	6.0%	57.4%	37.3%	2.9%	6.0%	19.1%	26.9%
Myanmar	26.1%	22.5%	6.4%	5.0%	37.4%	37.5%	1.0%	7.5%	29.1%	27.5%
Philippines	27.7%	24.0%	3.3%	6.7%	45.3%	38.7%	3.6%	12.0%	20.1%	18.7%
Singapore	12.3%	13.4%	5.3%	8.0%	69.3%	62.5%	0.9%	5.4%	12.3%	10.7%
Thailand	27.8%	24.1%	7.4%	14.5%	42.6%	49.4%	1.9%	6.0%	20.4%	6.0%
Vietnam	29.3%	27.3%	7.6%	3.4%	37.0%	47.7%	7.6%	3.4%	18.5%	18.2%

## Q49 Why do you distrust Japan?

340 respondents who chose the "Little Confidence" and "No Confidence" options in Q47

Country	Japan does not have the capacity or political will for global leadership		My country's political culture and worldview are incompatible with Japan's		I am concerned that Japan is distracted with its internal affairs and thus cannot focus on global concerns and issues		Japan's economic and military power could be used to threaten my country's interests and sovereignty		I do not consider Japan a reliable power	
	2022	2023	2022	2023	2022	2023	2022	2023	2022	2023
ASEAN	41.0%	32.5%	8.3%	8.1%	27.2%	38.6%	7.2%	7.7%	16.3%	13.2%
Brunei	46.2%	18.8%	0.0%	12.5%	30.8%	56.3%	15.4%	6.3%	7.7%	6.3%
Cambodia	21.9%	85.3%	3.1%	1.5%	25.0%	1.5%	21.9%	0.0%	28.1%	11.8%
Indonesia	26.9%	31.6%	7.7%	2.6%	38.5%	47.4%	7.7%	7.9%	19.2%	10.5%
Laos	75.0%	0.0%	25.0%	20.0%	0.0%	40.0%	0.0%	20.0%	0.0%	20.0%
Malaysia	33.3%	22.2%	4.8%	7.4%	23.8%	40.7%	7.1%	7.4%	31.0%	22.2%
Myanmar	42.6%	14.8%	7.4%	21.3%	22.1%	36.1%	2.9%	4.9%	25.0%	23.0%
Philippines	30.8%	25.0%	12.8%	12.5%	35.9%	25.0%	10.3%	25.0%	10.3%	12.5%
Singapore	57.4%	38.3%	0.0%	3.3%	24.6%	43.3%	1.6%	1.7%	16.4%	13.3%
Thailand	42.3%	29.6%	7.7%	0.0%	38.5%	59.3%	0.0%	3.7%	11.5%	7.4%
Vietnam	33.3%	59.1%	14.3%	0.0%	33.3%	36.4%	4.8%	0.0%	14.3%	4.5%

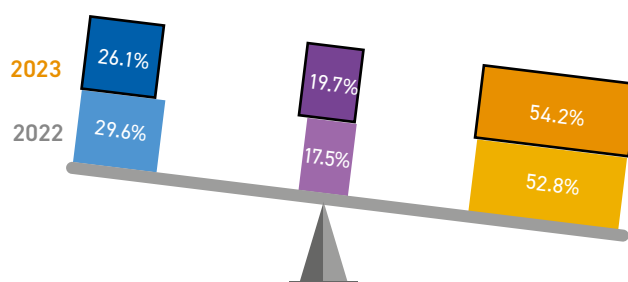
## THE UNITED STATES

The perception of trust toward the US continues to be strong. The level of trust increased marginally from 52.8% last year to 54.2% this year while the share of US sceptics dropped from 29.6% in 2022 to 26.1% this year.

Confidence in the US is shared widely among respondents from Cambodia (85.1%), the Philippines (69.7%), Laos (64.4%), and Myanmar (58.2%). The largest swing in trust towards Washington is found in Cambodia and Laos. Cambodia's trust towards the US moved from 55.5% in 2022 to 85.1% this year while the level of distrust dwindled from 28.4% to 9.7%. Similarly, the perception of trust in Laos improved from 20.5% last year to 64.4% this year while the level of distrust plummeted from 50.0% to 5.6%.

Among those who trust the US, 39.2% believe that the US has vast economic resources and the political will to provide global leadership. This is a decline from 45.5% in 2022. This is true particularly in Vietnam (57.1%), Indonesia (52.5%), Malaysia (50.0%), Myanmar (44.8%), and Thailand (41.4%). A proportion (30.0%) in this group also believe that the US' military power is an asset for global peace and security, an increase from 25.1% in 2022.

In the cohort who distrusts the US, 30.7% believe that the US is distracted by its internal affairs and thus cannot focus on global concerns and issues. This view is widely shared among those from Singapore (52.5%), Thailand (40.0%), Brunei (37.5%).



### Q50 How confident are you that the US will “do the right thing” to contribute to global peace, security, prosperity, and governance?

Country	No Confidence		Little Confidence		No Comment		Confident		Very Confident	
	2022	2023	2022	2023	2022	2023	2022	2023	2022	2023
ASEAN	7.4%	6.5%	22.2%	19.6%	17.5%	19.7%	39.9%	36.1%	12.9%	18.1%
Brunei	9.4%	2.5%	41.5%	10.8%	18.9%	41.7%	28.3%	35.0%	1.9%	10.0%
Cambodia	8.6%	3.0%	19.8%	6.7%	16.0%	5.2%	43.2%	26.1%	12.3%	59.0%
Indonesia	11.5%	9.9%	18.3%	40.5%	23.7%	16.5%	42.0%	25.6%	4.6%	7.4%
Laos	15.9%	0.9%	34.1%	4.7%	29.5%	29.9%	20.5%	57.9%	0.0%	6.5%
Malaysia	11.1%	8.1%	23.0%	30.6%	12.6%	19.4%	29.6%	37.1%	23.7%	4.8%
Myanmar	2.6%	15.7%	8.9%	14.8%	14.0%	11.3%	48.3%	13.9%	26.3%	44.3%
Philippines	3.0%	4.0%	19.0%	16.2%	11.5%	10.1%	50.8%	52.5%	15.8%	17.2%
Singapore	5.0%	7.2%	26.1%	31.3%	13.5%	17.3%	41.4%	33.7%	14.0%	10.6%
Thailand	6.0%	9.0%	20.5%	25.7%	19.7%	16.7%	38.5%	35.4%	15.4%	13.2%
Vietnam	1.4%	5.1%	11.1%	14.7%	15.3%	28.7%	56.9%	43.4%	15.3%	8.1%

## Q51 Why do you trust the US?

697 respondents who chose the "Confident" and "Very Confident" options in Q50

Country	The US has vast economic resources and the political will to provide global leadership		My country's political culture and worldview are compatible with the US'		The US is a responsible stakeholder that respects and champions international law		The US' military power is an asset for global peace and security		I respect the US and admire its civilisation and culture	
	2022	2023	2022	2023	2022	2023	2022	2023	2022	2023
ASEAN	45.5%	39.2%	5.2%	7.3%	19.5%	18.2%	25.1%	30.0%	4.7%	5.4%
Brunei	43.8%	16.7%	0.0%	13.0%	18.8%	44.4%	37.5%	20.4%	0.0%	5.6%
Cambodia	42.2%	20.2%	11.1%	3.5%	28.9%	17.5%	8.9%	55.3%	8.9%	3.5%
Indonesia	44.3%	52.5%	3.3%	7.5%	19.7%	12.5%	27.9%	25.0%	4.9%	2.5%
Laos	66.7%	31.9%	0.0%	7.2%	11.1%	18.8%	22.2%	36.2%	0.0%	5.8%
Malaysia	43.1%	50.0%	2.8%	5.8%	22.2%	11.5%	23.6%	19.2%	8.3%	13.5%
Myanmar	43.7%	44.8%	3.4%	3.0%	17.6%	10.4%	25.3%	38.8%	10.0%	3.0%
Philippines	43.6%	39.1%	9.8%	17.4%	15.4%	13.0%	28.2%	23.2%	3.0%	7.2%
Singapore	36.6%	38.0%	4.1%	5.4%	25.2%	21.7%	28.5%	29.3%	5.7%	5.4%
Thailand	34.9%	41.4%	12.7%	8.6%	22.2%	22.9%	27.0%	24.3%	3.2%	2.9%
Vietnam	56.7%	57.1%	4.8%	1.4%	13.5%	8.6%	22.1%	28.6%	2.9%	4.3%

## Q52 Why do you distrust the US?

356 respondents who chose the "Little Confidence" and "No Confidence" options in Q50

Country	The US does not have the capacity or political will for global leadership		My country's political culture and worldview are incompatible with the US'		I am concerned that the US is distracted with its internal affairs and thus cannot focus on global concerns and issues		The US' economic and military power could be used to threaten my country's interests and sovereignty		I do not consider the US a reliable power	
	2022	2023	2022	2023	2022	2023	2022	2023	2022	2023
ASEAN	3.9%	6.0%	9.9%	12.5%	36.7%	30.7%	23.5%	25.6%	26.0%	25.2%
Brunei	7.4%	12.5%	7.4%	25.0%	25.9%	37.5%	33.3%	6.3%	25.9%	18.8%
Cambodia	0.0%	0.0%	13.0%	15.4%	30.4%	30.8%	34.8%	7.7%	21.7%	46.2%
Indonesia	5.1%	6.6%	12.8%	11.5%	28.2%	16.4%	41.0%	42.6%	12.8%	23.0%
Laos	4.5%	16.7%	18.2%	16.7%	22.7%	33.3%	27.3%	16.7%	27.3%	16.7%
Malaysia	2.2%	6.3%	2.2%	8.3%	32.6%	18.8%	26.1%	29.2%	37.0%	37.5%
Myanmar	0.0%	5.7%	20.0%	22.9%	45.0%	17.1%	10.0%	40.0%	25.0%	14.3%
Philippines	2.3%	5.0%	4.5%	10.0%	45.5%	35.0%	28.4%	40.0%	19.3%	10.0%
Singapore	5.8%	1.3%	1.4%	3.8%	52.2%	52.5%	5.8%	6.3%	34.8%	36.3%
Thailand	6.5%	2.0%	19.4%	4.0%	29.0%	40.0%	22.6%	34.0%	22.6%	20.0%
Vietnam	5.6%	3.7%	0.0%	7.4%	55.6%	25.9%	5.6%	33.3%	33.3%	29.6%



# TRUST AND DISTRUST RANKINGS OF MAJOR POWERS IN THE REGION

The "trust" and "distrust" rankings of five powers who can most potentially influence Southeast Asia are based on a consolidated five-point Likert scale of positive and negative responses ("Very Confident" to "No Confidence"). The "No Comment" responses are removed from this analysis.

Japan maintains its lead as the region's most trusted power (54.5%) with the US at a very close second (54.2%), followed by the EU (51.0%), China (29.5%) and India (25.7%). At the country level, the largest drops in trust levels towards Japan are recorded in Myanmar (-23.2%), Cambodia (-13.4%), and the Philippines (-6.6%). The biggest increases in confidence levels towards Japan can be found in Brunei from 56.6% in 2022 to 79.2% in 2023 and in Thailand from 46.2% in 2022 to 57.7% in 2023. The view of Japan as a responsible international stakeholder is still strong at 41.0%, albeit with a decline from 46.6% in 2022. However, the view that Japan's military power can be an asset for peace and stability experienced almost a three-fold increase from 2.6% in 2022 to 7.2% in 2023. This is following the turn of Japan's defence policy with the by-now famous quote by Prime Minister Fumio Kishida that "East Asia is the Ukraine of tomorrow". Yet the threat perception that Japan's military prowess can threaten other countries has maintained relatively stable figures at 7.7%, which remains the weakest reason for distrust in Japan. What is perhaps of greater concern is the jump in perception that Japan was increasingly more distracted with its internal affairs and relations within Northeast Asia from 27.2% to 38.6% as a predominant reason that Japan could not be counted on to "do the right thing".

Southeast Asia appears to have improved its perceptions of the US at the midterm mark of the Biden Administration. Between 2022 and 2023, the US managed to narrow the margins from 1.4% in 2022 to 0.3% in 2023 between itself and Japan. At the country level, Laos' trust in the US registered a 43.9% and Cambodia a 29.6% increase respectively. The trust dividends from Deputy Secretary of State Wendy Sherman's visit to Vientiane in June 2022 and President Biden's meeting with Cambodia's Prime Minister Hun Sen at the special ASEAN-US Summit in May 2022 appear to have paid off. The biggest drops in levels of confidence towards the US can be attributed to Vietnam (-20.7%), Myanmar (-16.4%) and Indonesia (-13.6%). Interestingly, the prevailing reason for distrust in the US for these three countries is that the US' economic and military power can be used to threaten interests and sovereignty.

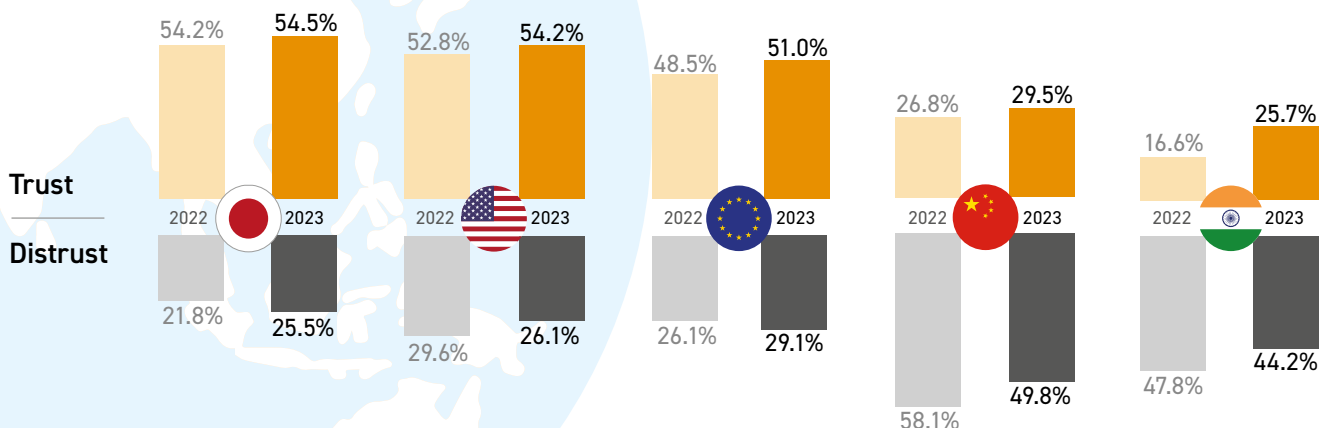
Trust ratings for the EU improved from 48.5% to 51.0% but this is still not sufficient to return the EU to its second-place trust ranking in 2021. The prevailing reason that the EU is a responsible stakeholder that respects and champions international law has remained consistent at 30.9% among respondents who trust

the EU. Conversely, the view that the EU does not possess the capacity or political will for global leadership has increased from 26.7% to 33.4%. This view saw drastic increases in Brunei, Cambodia, Laos, Thailand, and Vietnam.

The region's trust in China continued to improve from 26.8% to 29.5% and distrust levels dropped from 58.1% to 49.8%. At the country level, drastic increases in trust levels are recorded in Brunei (+43.9%), Laos (+18.9%) and Philippines (+12.5%). The prevailing reason for higher trust levels in China can be attributed to China's vast economic resources and strong political will to provide global leadership increasing from 43.8% in 2022 to 47.6% in 2023. The second-ranked reason of China as a responsible stakeholder that respects and champions international law increased from 13.6% in 2022 to 18.7% in 2023. Similarly, the distrust levels dropped in Brunei, Laos, Malaysia, Myanmar, the Philippines, and Singapore. The prevailing reason for distrust is the fear that China's economic and military power can be used to threaten countries, although it registered a decline from 49.6% in 2022 to 41.4% in 2023. This threat perception remains historically highest in Vietnam and lowest in Brunei. China has consistently improved from 19.0% in 2021 to 26.8% in 2022 to 29.5% in 2023. Similarly, its distrust ratings dropped from 59.6% in 2021 to 58.1% in 2022 to 49.8% in 2023.

India recorded the most significant improvement in trust ratings from 16.6% to 25.7% whereas its distrust ratings dropped from 47.8% to 44.2%. This favourable view of India is corroborated in the question of which "third parties" ASEAN could seek out where India managed to displace Australia to take third place (see Q32). The prevailing view is of India as a responsible stakeholder that respects and champions international law at 25.4% followed by the view that India possessed vast economic resources and political will to exercise leadership at 22.0%. India's strategic counterweight could be useful for a region trying to remain neutral. India's use of diplomatic ambiguity in many key global issues from Ukraine to climate change appear to be welcomed. India's G20 presidency will be closely watched this year.

Bread-and-butter issues of unemployment, inflation, commodities crunch, and rising cost-of-living remain foremost on the minds of Southeast Asians. The question is which power Southeast Asia can count on to resolve pressing issues of trade, investment, defence and yet help to maintain the strategic balance of power without forcing hard choices.





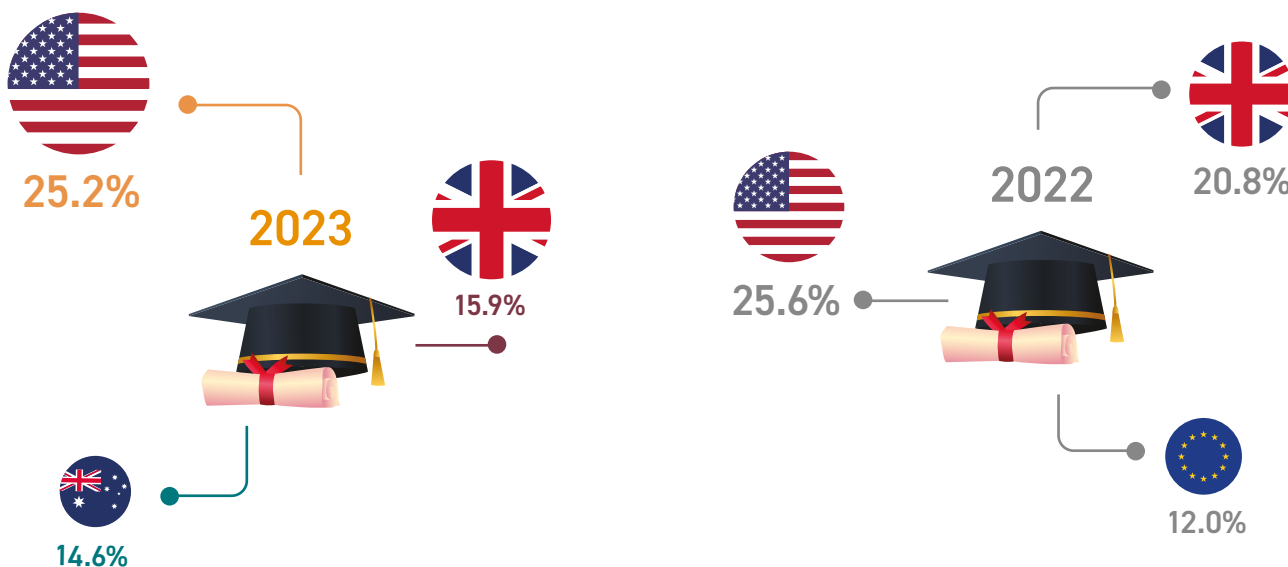
## SECTION VI: Soft Power

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

### PREFERENCE FOR TERTIARY EDUCATION

The US (25.2%) remains the region's top destination for tertiary education, followed by the UK (15.9%), and Australia (14.6%), the EU (13.4%), and ASEAN (9.4%). Interestingly, Australia made it to the top three this year with a significant increase from last year (9.9%). The region's preference for ASEAN has also improved from 5.8% last year to 9.4% this year.

The US is the most popular destination for tertiary education among five ASEAN member states: Myanmar (45.2%), Vietnam (39.0%), Singapore (27.4%), Thailand (27.1%), the Philippines (26.3%), Indonesia (22.3%). The UK is most popular in Brunei (35.8%), Singapore (30.3%), Malaysia (25.0%). Australia is top choice in Cambodia (32.1%) and Laos (21.5%).



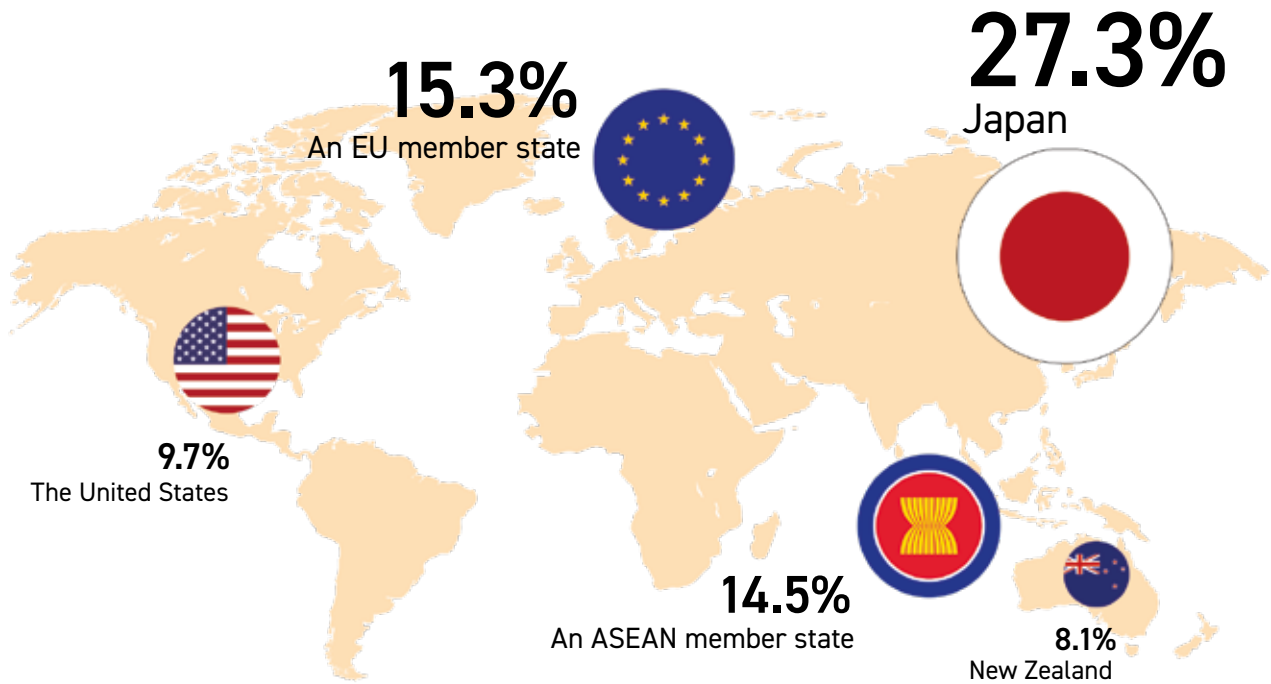
### Q53 Which country would be your first choice if you (or your child) were offered a scholarship to a university?

Country	An ASEAN member state	Australia	China	India	An EU member state	Japan	Republic of Korea	New Zealand	The United Kingdom	The United States
ASEAN	9.4%	14.6%	5.4%	0.9%	13.4%	9.2%	1.2%	4.6%	15.9%	25.2%
BN	8.3%	10.8%	6.7%	4.2%	7.5%	4.2%	0.0%	7.5%	35.8%	15.0%
KH	22.4%	32.1%	2.2%	0.0%	9.7%	7.5%	2.2%	3.7%	2.2%	17.9%
ID	6.6%	14.9%	4.1%	0.0%	18.2%	15.7%	4.1%	3.3%	10.7%	22.3%
LA	14.0%	21.5%	11.2%	0.9%	20.6%	2.8%	1.9%	3.7%	7.5%	15.9%
MY	9.7%	11.3%	5.6%	2.4%	8.1%	12.1%	0.0%	9.7%	25.0%	16.1%
MM	6.1%	8.7%	3.5%	0.0%	7.0%	17.4%	0.0%	4.3%	7.8%	45.2%
PH	17.2%	6.1%	1.0%	0.0%	16.2%	10.1%	3.0%	2.0%	18.2%	26.3%
SG	4.3%	9.6%	11.5%	0.5%	12.0%	1.4%	0.0%	2.9%	30.3%	27.4%
TH	4.2%	13.9%	5.6%	1.4%	14.6%	11.1%	0.7%	4.9%	16.7%	27.1%
VN	1.5%	17.6%	2.9%	0.0%	20.6%	9.6%	0.0%	3.7%	5.1%	39.0%

## MOST PREFERRED COUNTRY TO VISIT

Japan remains the most popular destination to visit for Southeast Asians (27.3%), followed by the EU (15.3%), and an ASEAN member state (14.5%). Japan tops the list of travel destinations among respondents from six ASEAN member

states: Thailand (52.1%), Indonesia (37.2%), Singapore (34.1%), Brunei (28.3%), the Philippines (28.3%), and Myanmar (20.9%). The EU is most preferred in Vietnam (30.1%). Meanwhile ASEAN is most popular in Malaysia (24.2%) and Cambodia (28.4%).



### Q54 Which country is your favourite holiday destination?

Country	An ASEAN member state	Australia	China	India	An EU member state	Japan	Republic of Korea	New Zealand	The United Kingdom	The United States
ASEAN	14.5%	8.0%	3.4%	1.4%	15.3%	27.3%	7.2%	8.1%	5.2%	9.7%
BN	15.0%	10.8%	5.8%	3.3%	5.8%	28.3%	4.2%	11.7%	9.2%	5.8%
KH	28.4%	15.7%	2.2%	0.0%	15.7%	14.2%	4.5%	5.2%	3.0%	11.2%
ID	18.2%	5.0%	0.8%	0.0%	15.7%	37.2%	11.6%	6.6%	1.7%	3.3%
LA	7.5%	6.5%	3.7%	4.7%	17.8%	11.2%	4.7%	7.5%	6.5%	29.9%
MY	24.2%	10.5%	3.2%	2.4%	10.5%	20.2%	4.0%	15.3%	7.3%	2.4%
MM	7.8%	7.8%	0.9%	2.6%	12.2%	20.9%	14.8%	11.3%	9.6%	12.2%
PH	17.2%	4.0%	1.0%	0.0%	12.1%	28.3%	11.1%	6.1%	4.0%	16.2%
SG	15.9%	9.1%	7.7%	0.5%	13.9%	34.1%	3.8%	6.7%	3.8%	4.3%
TH	4.9%	5.6%	2.1%	0.0%	18.8%	52.1%	3.5%	7.6%	2.1%	3.5%
VN	5.9%	5.1%	6.6%	0.0%	30.1%	26.5%	10.3%	2.9%	4.4%	8.1%

