



TRENDS IN SOUTHEAST ASIA

# THE INDONESIA NATIONAL SURVEY PROJECT 2022

**Engaging with Developments  
in the Political, Economic and  
Social Spheres**

Burhanuddin Muhtadi, Hui Yew-Foong  
and Siwage Dharma Negara

**ISEAS**  
YUSOF ISHAK  
INSTITUTE

ISSUE

**3**

2023

# TRENDS IN SOUTHEAST ASIA

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Published by: ISEAS Publishing  
30 Heng Mui Keng Terrace  
Singapore 119614  
publish@iseas.edu.sg  
<http://bookshop.iseas.edu.sg>

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### **ISEAS Library Cataloguing-in-Publication Data**

Name(s): Muhtadi, Burhanuddin, 1977–, author. | Hui Yew-Foong, author. | Negara, Siwage Dharma, author.

Title: The Indonesia National Survey Project 2022 : engaging with developments in the political, economic and social spheres / by Burhanuddin Muhtadi, Hui Yew-Foong and Siwage Dharma Negara.

Description: Singapore : ISEAS-Yusof Ishak Institute, February 2023. | Series: Trends in Southeast Asia, ISSN 0219-3213 ; TRS3/23 | Includes bibliographical references.

Identifiers: ISBN 9789815104097 (soft cover) | ISBN 9789815104103 (ebook PDF)

Subjects: LCSH: Indonesia—Politics and government—Public opinion. | Indonesia—Economic conditions—Public opinion. | Indonesia—Social conditions—Public opinion.

Classification: LCC DS501 I59T no. 3(2023)

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Typeset by Superskill Graphics Pte Ltd  
Printed in Singapore by Mainland Press Pte Ltd

## FOREWORD

The economic, political, strategic and cultural dynamism in Southeast Asia has gained added relevance in recent years with the spectacular rise of giant economies in East and South Asia. This has drawn greater attention to the region and to the enhanced role it now plays in international relations and global economics.

The sustained effort made by Southeast Asian nations since 1967 towards a peaceful and gradual integration of their economies has had indubitable success, and perhaps as a consequence of this, most of these countries are undergoing deep political and social changes domestically and are constructing innovative solutions to meet new international challenges. Big Power tensions continue to be played out in the neighbourhood despite the tradition of neutrality exercised by the Association of Southeast Asian Nations (ASEAN).

The **Trends in Southeast Asia** series acts as a platform for serious analyses by selected authors who are experts in their fields. It is aimed at encouraging policymakers and scholars to contemplate the diversity and dynamism of this exciting region.

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# **The Indonesia National Survey Project 2022: Engaging with Developments in the Political, Economic and Social Spheres**

By Burhanuddin Muhtadi, Hui Yew-Foong and Siwage Dharma Negara

## **EXECUTIVE SUMMARY**

ISEAS – Yusof Ishak Institute has commissioned a second nationwide survey in Indonesia as a follow-up to the first similar project in 2017 called the Indonesia National Survey Project (INSP). Its broad aim is to enhance understanding of political, economic, and social developments in Indonesia. Its key findings are as follows:

- The approval rating of President Joko Widodo hovers around 71.8 per cent, at least before the September 2022 announcement on the fuel subsidy cut. His major infrastructure push as his flagship development programme still garners the most positive assessment. However, poverty, unemployment and cost of living remain key flashpoints that the government should be concerned with.
- While respondents are generally aware of the plan to relocate the national capital and are more likely to agree rather than disagree with it, most have reservations about its urgency and the financial burden that such an undertaking implies.
- Muslim countries such as Saudi Arabia and Turkey are the most admired by Indonesians, followed by Singapore. In view of the ongoing armed conflict in Europe, it is notable that Russia is more admired than the US and EU.
- Where the rise of China is concerned, respondents who perceive a negative impact exceed those who perceive a positive one, which is a reversal of the trend found in the 2017 survey. At the same time,

negative opinions towards China's Belt and Road Initiative is also more strongly evident than positive opinion.

- While Indonesian Muslims are generally devout practising Muslims, the majority do not harbour aspirations to make Indonesia an Islamic state, preferring instead the cultural inclusiveness currently in place.
- Reservations about the political role of Chinese Indonesians continue to persist, and a majority do not support members of this community taking up key political positions.
- Respondents are largely aware of climate change, environment and energy transition issues, and support government policies addressing them. However, the major challenge is seen to be in the promotion of lifestyle changes that will reduce damage to the environment.

# The Indonesia National Survey Project 2022: Engaging with Developments in the Political, Economic and Social Spheres

By Burhanuddin Muhtadi, Hui Yew-Foong and  
Siwage Dharma Negara<sup>1</sup>

## 1. INTRODUCTION

### *1.1 Background of the Study*

It has been more than two decades since the beginning of the *Reformasi* (Reform Movement) era marked by the fall of President Suharto. Experts are generally divided into two camps that hold sharply different views about Indonesia's achievements during that period. The first scholarly camp holds a gloomier view, observing that the old corrupt political oligarchic forces have persisted in sabotaging the country's democratic structural reforms, taking the country back to the practices of the New Order era when corruption, collusion and nepotism were the political and business order of the day.<sup>2</sup> According to this group, there is hardly

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<sup>1</sup> Burhanuddin Muhtadi is Visiting Fellow at the ISEAS – Yusof Ishak Institute, Singapore, Senior Lecturer at State Islamic University, Jakarta and Executive Director of Indikator Politik Indonesia. Hui Yew-Foong is Visiting Senior Fellow at the ISEAS – Yusof Ishak Institute, Singapore. Siwage Dharma Negara is Senior Fellow at the ISEAS – Yusof Ishak Institute, Singapore. The authors would like to thank Kennedy Muslim, Hendro Prasetyo and Rizki Rahmadian for assisting with the statistical analysis of the survey data.

<sup>2</sup> Richard Robison and Vedi Hadiz, *Reorganising Power in Indonesia: The Politics of Oligarchy in an Age of Markets* (London: Routledge Curzon, 2004). Also, Vedi Hadiz and Richard Robison, "The Political Economy of Oligarchy and the Reorganization of Power in Indonesia", *Indonesia* 96 (2013): 35–57.

any significant difference between the New Order and Reform eras. Meanwhile, the other scholarly camp provides a rosier picture of the democratization process in Indonesia.<sup>3</sup> Government officials have also repeatedly made claims that Indonesia has indeed taken big strides forward politically and economically since the end of the New Order.

But what is the public's own perception of the reform achievements? We do not have information on public perceptions from the authoritarian era due to the political and academic restrictions on public opinion research at that time.<sup>4</sup> What we can do is compare public opinion in the reform era from time to time to check how satisfied the public has been with ongoing developments in Indonesia. Moreover, in a democracy, public opinion surveys and the feedback they provide for public officials serve as one of the foremost methods for improving governance.

Back in 2017, the ISEAS – Yusof Ishak Institute (ISEAS) commissioned the Indonesian Survey Institute (LSI) to undertake the first Indonesia National Survey Project (known as the INSP2017), which collected data on the attitudes and behaviour of Indonesians with respect to key issues in the economic, socio-cultural and political spheres.<sup>5</sup> In this latest INSP undertaken in 2022 (INSP2022), besides retaining questions that continue to be relevant to issues in the three main areas, we have also adopted new issues and fielded the corresponding questions. This nationwide survey was conducted through face-to-face interviews with 1,620 respondents across all 34 provinces of Indonesia, from 21 to 28 July 2022.

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<sup>3</sup> E.g., Saiful Mujani, R.W. Liddle, Kuskritho Ambardi, *Voting Behavior in Indonesia since Democratization: Critical Democrats* (Cambridge University Press, 2018); Dan Slater, “What Indonesian Democracy Can Teach the World”, *Journal of Democracy* 34, no. 1 (January 2023): 95–109.

<sup>4</sup> Lembaga Survei Indonesia (LSI), *Jajak Pendapat dan Pemilu di Indonesia* (Jakarta: LSI, 2004).

<sup>5</sup> Diego Fossati, Hui Yew-Foong, and Siwage Dharma Negara, *The Indonesia National Survey Project: Economy, Society and Politics*, Trends in Southeast Asia, no. 10/2017 (Singapore: ISEAS – Yusof Ishak Institute, 2017).

## 1.2 Survey Methodology

The survey employed a multi-stage cluster sampling method designed to obtain a representative sample of the Indonesian population. Conventional quantitative tests conducted by LSI using data from the 2020 Population Census suggest that this goal was achieved, as our sample closely mirrors the composition of the Indonesian population in terms of gender, region, location of residency (urban versus rural), religion and ethnicity. Data were gathered through face-to-face interviews with 1,620 adult Indonesian citizens (17 years old and above and/or married), a method that allowed us to collect high-quality information on a wider range of issues than typically allowed by web-based surveys.

In the first stage, the population was stratified based on the proportional population of each of the 34 provinces throughout Indonesia, location of domicile (rural or urban; about 50 per cent each) and gender (about 50 per cent each). In the second stage, villages or *kelurahan* (the smallest administrative area in Indonesia) were selected as the primary sampling unit (PSU), and systematic random sampling was done on the villages (urban or rural) selected in each province according to their respective proportion of the population. In total, 162 rural and urban villages were selected systematically. In the third stage, all Rukun Tetangga (RT), *dusun* or *lingkungan* (the smallest neighbourhood units) in the selected villages were listed, and five of them were selected at random. In the fourth stage, all households in each selected neighbourhood unit were listed, and two households were selected at random. Finally, at the fifth stage, all household members who were 17 years or older in each selected household were listed, and one member was selected to be a respondent with the aid of the Kish Grid. If a female respondent was selected from one household, a male respondent would be selected from another household. In case the selected respondent could not be interviewed for various reasons (not available after two visits during interview time in the village, refused to be interviewed, etc.), the respondent was substituted by repeating stages 4 and 5 above. As a result, from each selected PSU, ten respondents were selected this way, which provided the survey with a total of 1,620 respondents.



### *1.3 Purpose and Structure*

This report gives an overview of the key findings of the INSP2022, and where applicable, traces the trends that have evolved since the INSP2017. While we try to be comprehensive in our coverage, we are unable to report on all questions fielded in the survey due to space constraints. For questions that are covered, we limit ourselves to presenting the results, and in some cases, we provide further analysis through breakdowns by demographic factors such as gender, location, region, education and income. While we sometimes provide suggestions on the meaning and implications of the findings, the main goal of our discussion is to present the survey data to readers without any systematic attempt at drawing causal inferences. Other forthcoming publications will take up the task of further analysing the data and discussing their significance more critically.

In what follows, this report covers the five major themes around which the survey was designed, namely politics, economy, international relations, society and current issues. Section 2 engages with Indonesian domestic politics by examining President Joko Widodo's (Jokowi) approval ratings, state institutions, political interest, political participation, democracy, traditional values, nationalism, and the State Capital Relocation Plan. Section 3 reports on respondents' evaluations of the economy, especially with respect to household economic indicator assessment, the role of the government in the economy, President Jokowi's report card on economic issues, and digital transformation and Internet activities. Section 4 covers international relations issues such as the perception of the importance of foreign countries and ASEAN, the perception of China's impact, and the perception of the Belt and Road Initiative (BRI). Section 5 examines societal dynamics in terms of prevalent patterns of Islamic practice, the role of Islam in society and politics, current attitudes towards Chinese Indonesians, and also issues related to Papua. In section 6, we present findings on current topical issues, such as climate change, environment, and energy transition. We conclude in section 7 by summing up major observations based on the survey findings.

## 2. POLITICS

### 2.1 *Approval Rating of President Joko Widodo*

Around 71.8 per cent of respondents are quite or very satisfied with the performance of President Jokowi, which is slightly higher than the 68 per cent that was recorded for the INSP2017.<sup>6</sup> This is despite many criticisms about authoritarian tendencies and democratic regression under Jokowi.<sup>7</sup> The majority across almost every socio-demographic group and region are quite or very satisfied with Jokowi, except for the Minangkabau ethnic group (Figure 1). Notably, Jokowi's approval rating among non-Muslim respondents is very high at 91.6 per cent, which indicates his ability to unite non-Muslims as a voting bloc. Unsurprisingly, the majority of those who voted for the Prosperous Justice Party (PKS), a conservative Islamic party, and the Prabowo-Sandiaga pair in the 2019 parliamentary and presidential elections respectively, disapprove of Jokowi's performance (Figure 2).

### 2.2 *Trust in Institutions*

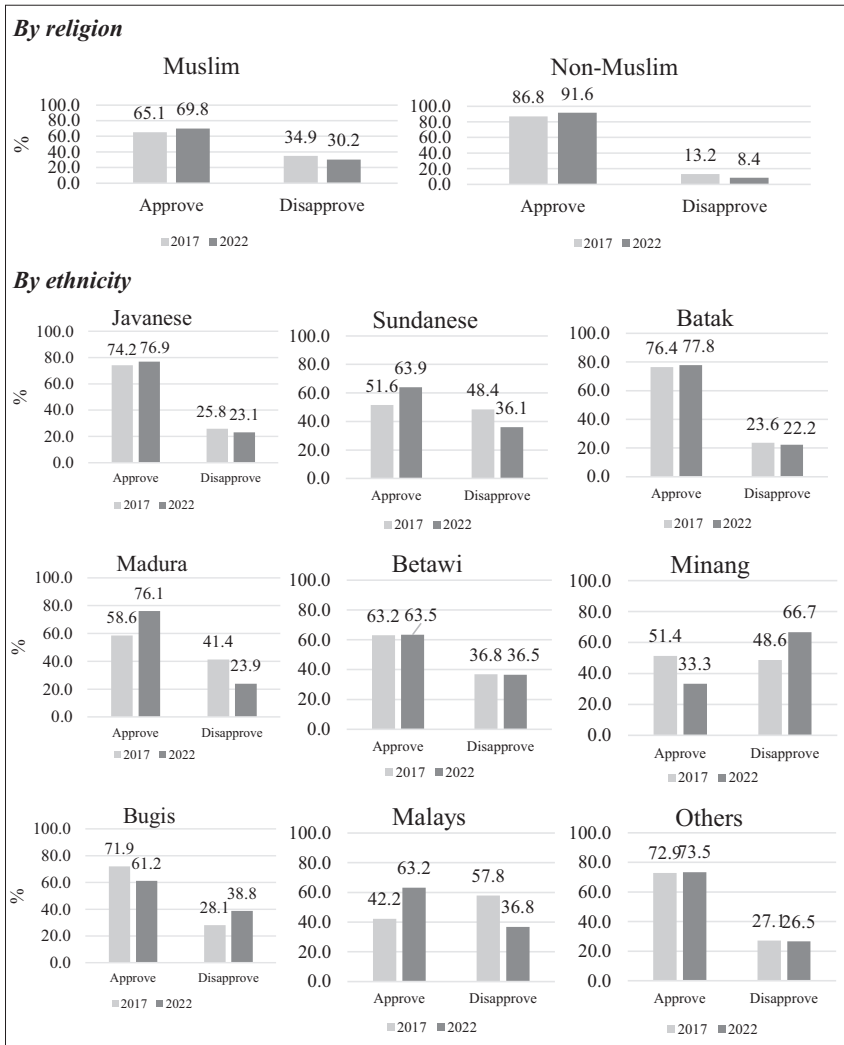
Respondents are asked how much they trust different institutions in Indonesia. Their answers show that the Armed Forces (TNI) remains the most trusted (89.6 per cent), followed by Provincial Governments (83.1 per cent), District/City Governments (81 per cent), the Central Government (80.4 per cent), and the President (78.7 per cent). Comparing with the INSP2017, we note that the level of trust has dropped slightly for the Armed Forces, Central Government, and General Elections Commission. The level of trust in the Provincial and District/City Governments has improved slightly along with Civil Service, while trust in the Corruption

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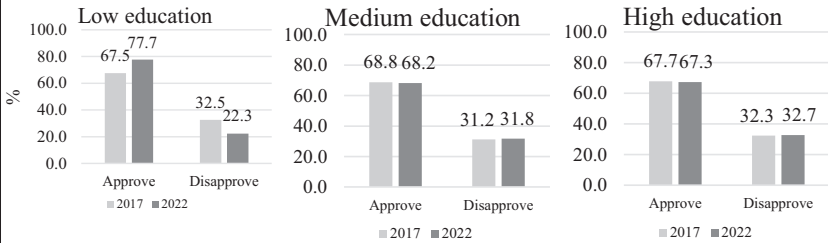
<sup>6</sup> Fossati, Hui, and Negara, *The Indonesia National Survey Project*, p. 28.

<sup>7</sup> For a commendably comprehensive overview of the many ways in which Indonesian democracy has deteriorated under Jokowi, see Thomas Power and Eve Warburton, eds, *Democracy in Indonesia: From Stagnation to Regression* (Singapore: ISEAS – Yusof Ishak Institute, 2020).

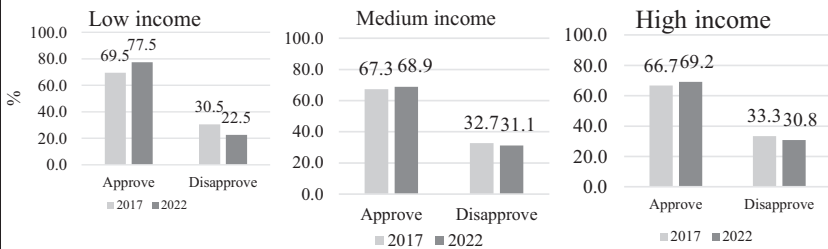
**Figure 1: Jokowi's Approval Rating by Socio-Demographic Group and Region**



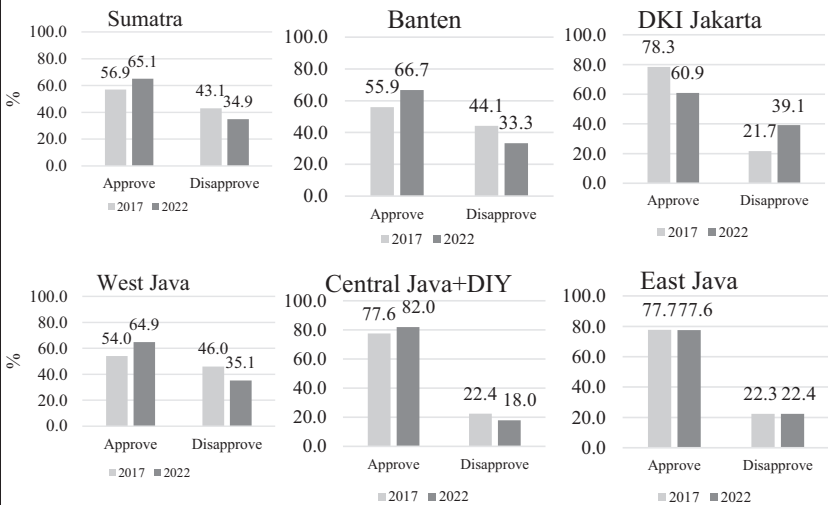
**By education**



**By income**

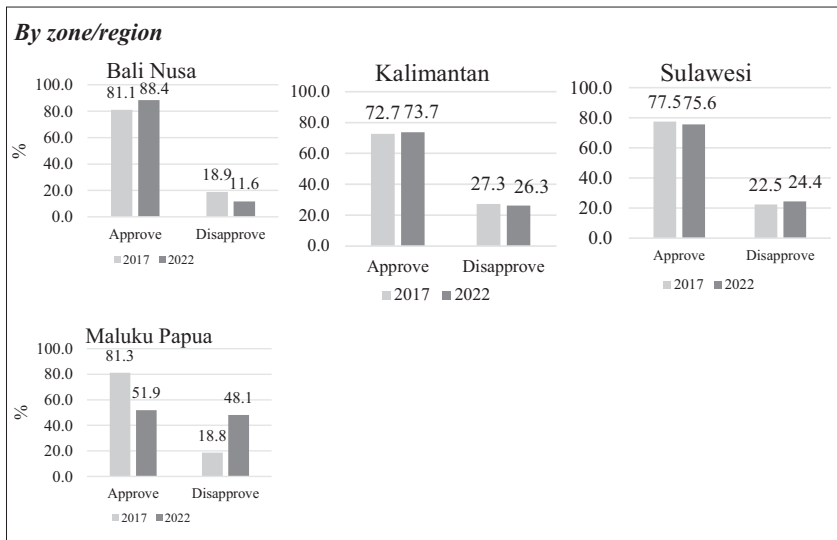


**By zone/region**



*continued on next page*

**Figure 1 – cont’d**

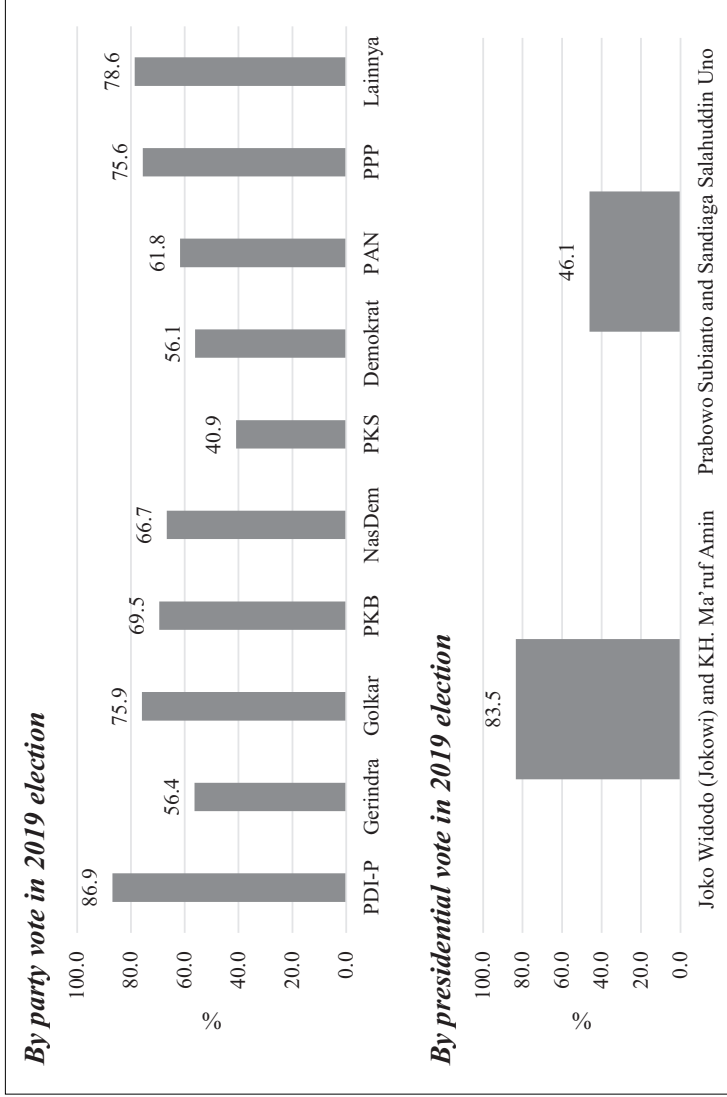


Eradication Commission (KPK) has decreased significantly from 83.1 to 72.7 per cent (Figure 3). The decline in public trust in the KPK is inextricably linked to revisions to the KPK Law passed in 2019, which weakened the KPK and reduced its independence,<sup>8</sup> as well as KPK leaders’ involvement in scandals.<sup>9</sup> Another interesting observation is the significant improvement in the trust level towards Parliament (DPR) and political parties from 55.4 per cent to 62.6 per cent and 45.8 per cent to 54.6 per cent respectively when compared to INSP2017 data, albeit these two institutions still rank at the bottom of the list.

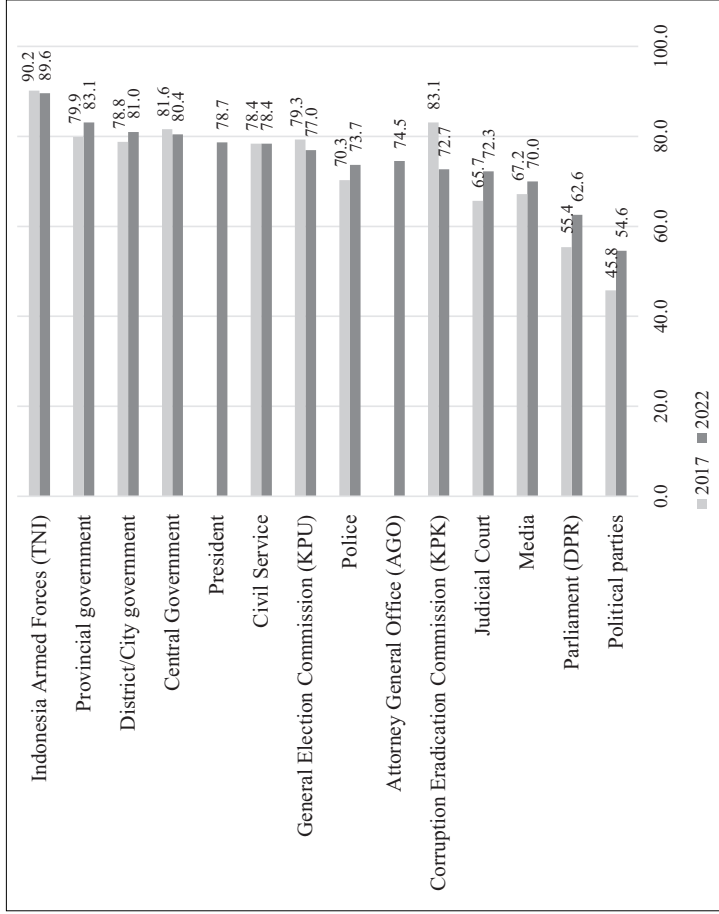
<sup>8</sup> CNN Indonesia, “Kepercayaan Publik ke KPK Makin Merosot sejak Revisi UU KPK”, 9 December 2021, <https://www.cnnindonesia.com/nasional/20211209141953-12-731988/kepercayaan-publik-ke-kpk-makin-merosot-sejak-revisi-uu-kpk>

<sup>9</sup> Kompas.com, “KPK yang Terus Panen Kritik dan Tingkat Kepercayaan yang Menurun ...”, 9 June 2022, <https://nasional.kompas.com/read/2022/06/09/19070061/kpk-yang-terus-panen-kritik-dan-tingkat-kepercayaan-yang-menurun->

**Figure 2: Jokowi's Approval Rating by Voting Patterns in the 2019 Elections**



**Figure 3: Trust in Institutions**



### *2.3 Political Participation*

Citizens generally do participate in elections. When asked if they ever participated in elections, the reported rate is 91.5 per cent for Regional Head elections, 90.4 per cent for the Legislative Election, and 89.4 per cent for the Presidential Election. However, participation is not high for political activities such as political campaigns (16 per cent), volunteering for candidates (10.3 per cent), contacting politicians to talk about public issues (8.6 per cent), using social media to receive or impart political information (8.1 per cent), participation in demonstrations or protests (5 per cent), and contributing to a candidate's campaign (3.2 per cent).

In terms of membership of organizations, religious groups or organizations, such as Nahdlatul Ulama, Muhammadiyah and non-formal Islamic religious study groups (*majelis taklim*), remain the most popular at 30.8 per cent (similar to 27.7 per cent in the INSP2017).<sup>10</sup> This is followed by Parents-Teachers Associations at 16.2 per cent, alumni associations at 15.1 per cent, farmers' groups at 11.2 per cent, and sports, arts and hobby associations at 11.2 per cent (Figure 4). Significantly, membership in Parents-Teachers Associations and alumni associations have seen huge increases, from 6.7 per cent and 5.3 per cent respectively in 2017.<sup>11</sup> This may have been due to the pandemic—necessitating greater involvement of parents in children's remote learning in the case of the former, and allowing more time for socializing in the case of the latter. Membership in political parties is the lowest at 1.7 per cent.

### *2.4 Political Interest and Party Affiliation*

Unsurprisingly, the majority of respondents are not interested in politics (71.4 per cent), while those who are quite or very interested are at 28.6 per cent. Only 8.7 per cent feel close to a certain political party, the most popular party being the Indonesian Democratic Party of Struggle (PDIP; 33.1 per cent), followed by the Party of Functional Groups

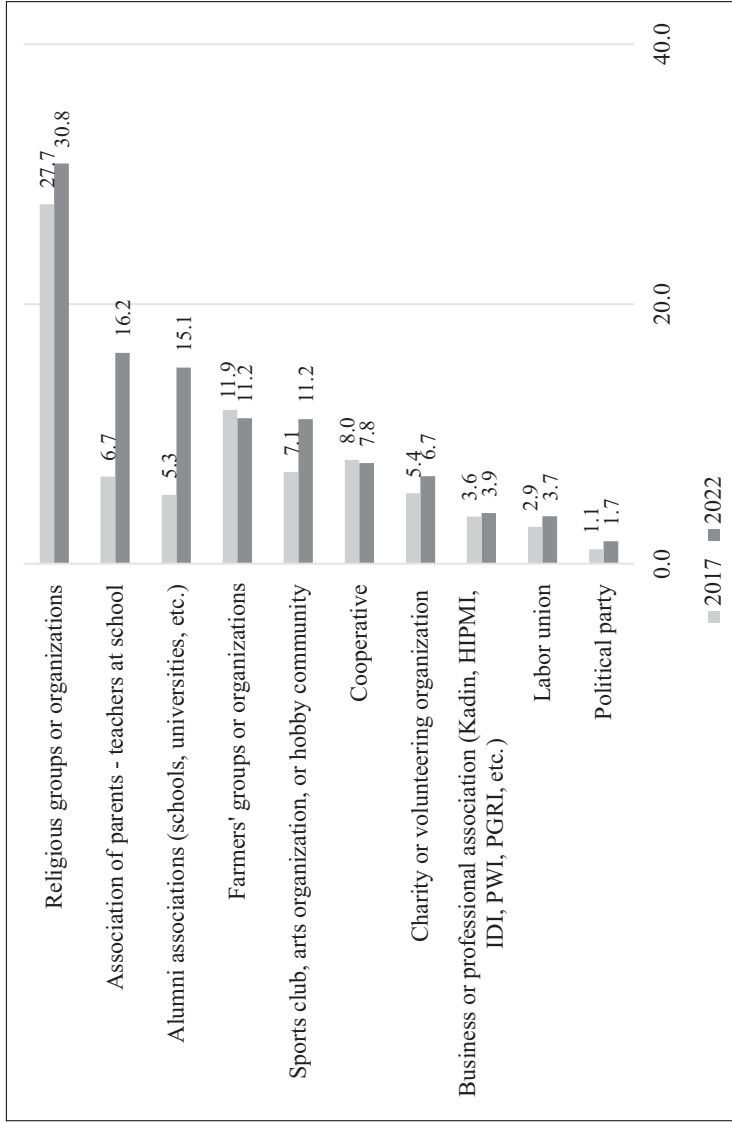
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<sup>10</sup> Fossati, Hui, and Negara, *The Indonesia National Survey Project*, p. 36.

<sup>11</sup> *Ibid.*, p. 37.



**Figure 4: Organizational Membership**



(Golkar; 19.5 per cent), National Awakening Party (PKB; 14.3 per cent), Great Indonesia Movement Party (Gerindra; 9.8 per cent) and Prosperous Justice Party (PKS; 8.3 per cent) (Figure 5). Findings that only 8.7 per cent of citizens have partisan attachments (slightly lower than in 2017 at around 9.6 per cent) confirm previous studies that party-voter ties are very weak. This is one key reason why Indonesian elections are becoming more candidate-centric, providing incentives for candidates to engage in vote-buying practices<sup>12</sup> and populist rhetoric.<sup>13</sup>

## 2.5 Nationalism

Generally, respondents have a very strong sense of nationalism. 96.0 per cent are proud to be Indonesian, 95.1 per cent would rather be Indonesian citizens than citizens of other countries, and 93.9 per cent feel that Indonesian culture is superior (Table 1). There is also a majority (77.8 per cent) that agree that Indonesia should attract talented Indonesians working in other countries to return. Conversely, much fewer respondents agree that Indonesia must be open to foreign professionals (46.8 per cent) and foreign workers (34.1 per cent).<sup>14</sup>

## 2.6 New Capital Relocation Plan<sup>15</sup>

One of President Jokowi's priorities in his second term in office is to build a new national capital (Ibu Kota Negara, IKN). The idea of moving the capital city from Jakarta has long been in gestation, and concrete steps towards its realization have only been taken under the Jokowi administration. Based on Law No. 30, 2022, the construction of the IKN was officially started in North Penajam Paser Regency, East Kalimantan Province.

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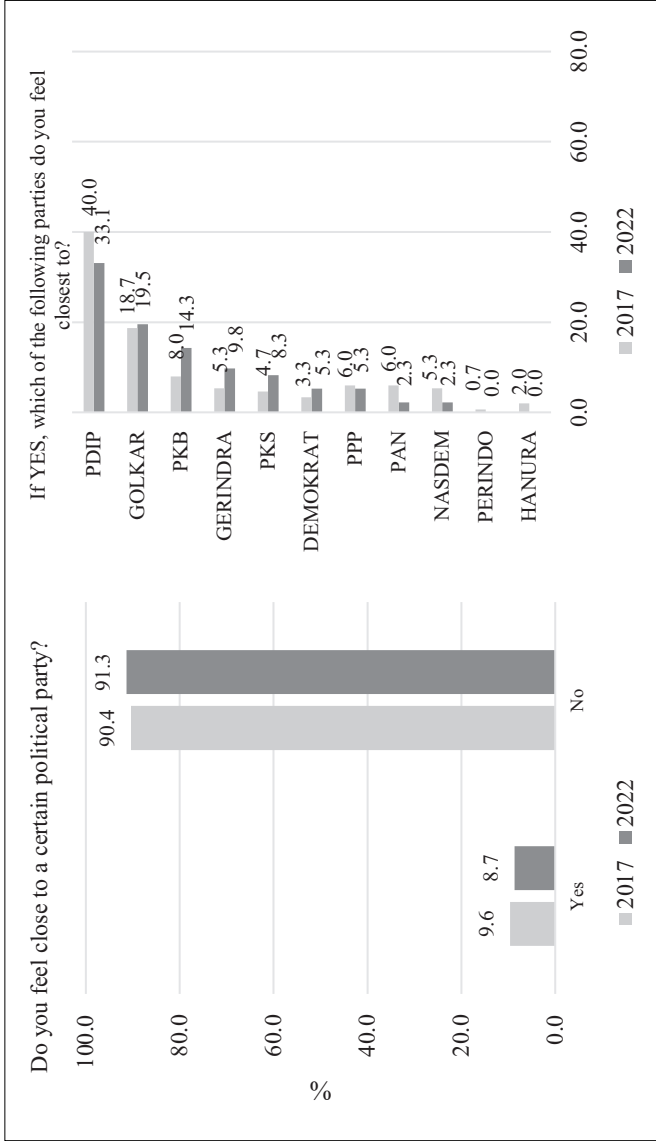
<sup>12</sup> Burhanuddin Muhtadi, *Vote Buying in Indonesia: The Mechanics of Electoral Bribery* (Singapore: Palgrave Macmillan, 2019).

<sup>13</sup> Paul D. Kenny, *Populism and Patronage: Why Populists Win Elections in India, Asia, and Beyond* (New York: Oxford University Press, 2017).

<sup>14</sup> Foreign professionals include doctors, engineers, and scientists, while foreign workers refer to blue-collar workers.

<sup>15</sup> The INSP2022 is the first survey to ask respondents why they support or oppose the moving of the nation's capital.

**Figure 5: Party Affiliation**



**Table 1: Nationalism**

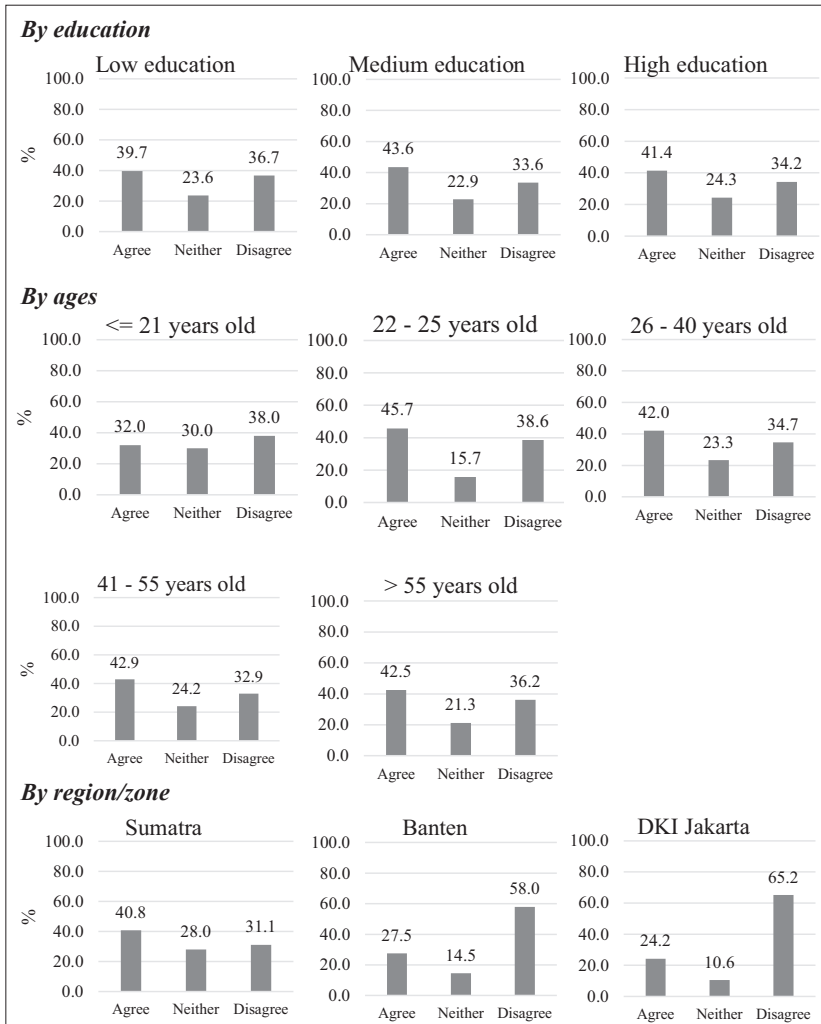
	Item	Strongly agree + agree	
		2017	2022
1	I am very proud to be Indonesian	97.1%	96.0%
2	I would rather be a citizen of Indonesia than any other country	96.8%	95.1%
3	Indonesians may not be perfect, but our culture is superior to others	95.2%	93.9%
4	The world would be a better place if other nations were more like Indonesia	82.4%	80.6%

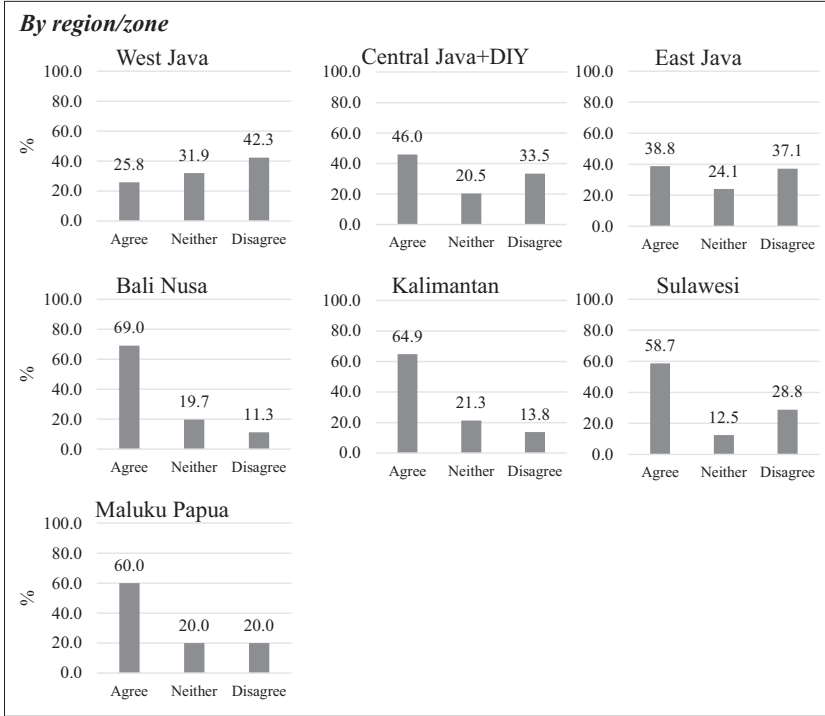
The public's response to the initiative has been quite diverse and the pros and cons are still being debated in national media. In general, people are not against the idea of moving the capital city from Jakarta, in order to alleviate the environmental burden on Jakarta, increase economic equity, and reduce the economic disparity between Java and provinces outside Java. Those who object tend to question the feasibility of relocating the capital to a remote area, especially the high costs involved even as the state struggles with the financial constraints imposed by the COVID-19 pandemic. In short, it is thought that the timing of moving the capital to a remote location during a pandemic may not be right.

The survey finds that the majority of respondents are aware of the IKN project (80.0 per cent), but only 41.9 per cent agree with the project while 34.8 per cent disagree and 23.3 per cent are neutral. Furthermore, when it comes to rating the urgency of the project, only 28.6 per cent consider it urgent, while 40.2 per cent consider it less urgent and 31.2 per cent consider it not urgent at all.

While there is no significant difference in responses based on gender and rural-urban location, respondents with middle and high education and those in the 22–40 age range seem more likely to agree with the IKN project (Figure 6). It is also notable that region-wise, support from respondents in Banten, DKI Jakarta and West Java tends to be lower than support from those living in other regions, plausibly because the former

**Figure 6: Support for IKN by Education, Age and Region**

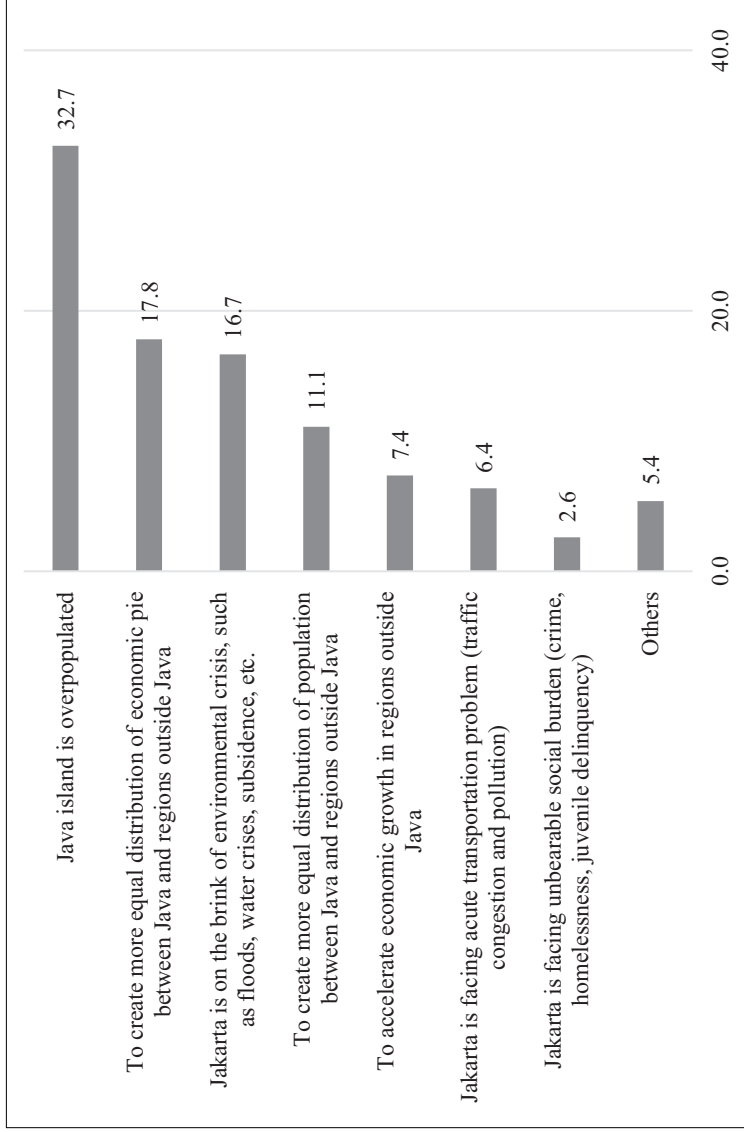




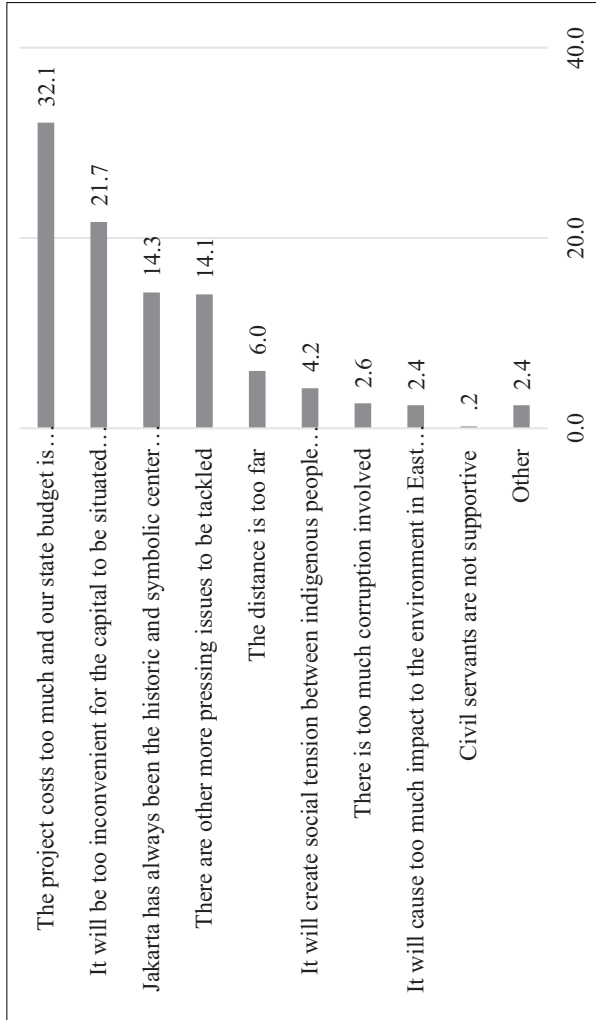
perceive that they will be negatively affected by the moving of the capital away from their regions.

For those who agree, the main reasons are: Java Island is overpopulated (32.7 per cent); to create greater economic equity between Java and other regions (17.8 per cent); and Jakarta’s environmental problems (16.7 per cent) (Figure 7). These are the three main reasons cited across all socio-demographic segments. Meanwhile, for those who disagree, the main reasons are: the high cost of relocation and its burden on the state budget (32.1 per cent); the inconvenience of having the capital outside Java (21.7 per cent); and Jakarta’s position as the historic and symbolic centre of the nation (14.3 per cent) (Figure 8).

**Figure 7: Reason for Approval of State Capital Relocation**



**Figure 8: Reason for Disapproval of State Capital Relocation**





### 3. ECONOMY

#### *3.1 Evaluation of the Economy*

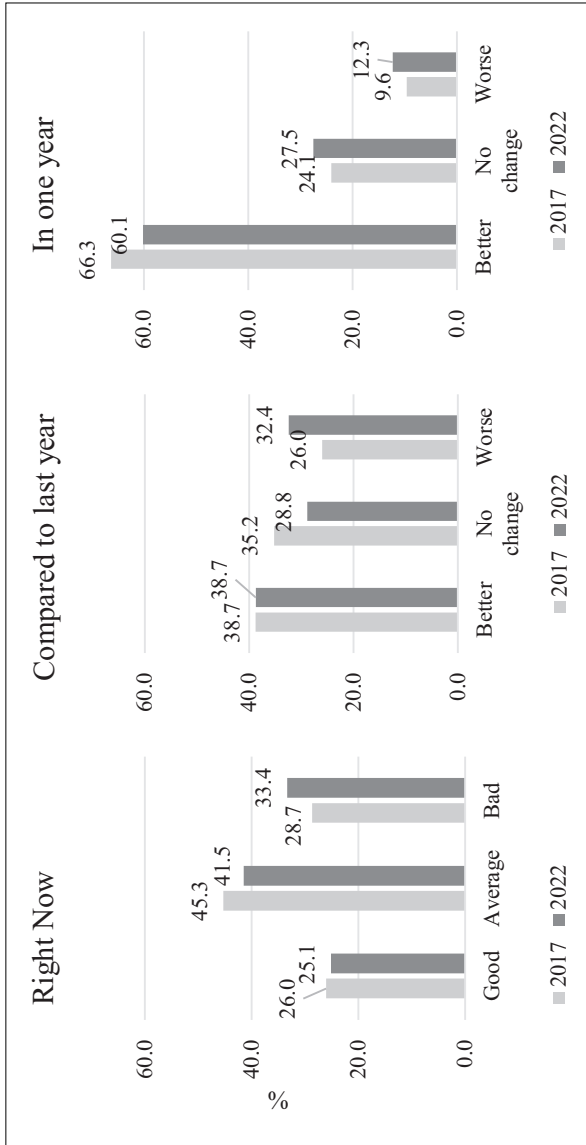
It is important to note that responses related to the evaluation of economic conditions, based on the survey taking place at the end of July 2022, were made in the context of an economy still recovering from the impact of COVID-19, but before the September 2022 announcement of fuel subsidy cuts by President Jokowi,<sup>16</sup> which resulted in increases in fuel price and consequently, inflationary pressure on the price of goods all over the country. In this context, respondents were asked to evaluate the current condition of the Indonesian economy, the condition of the economy as compared to the previous year, and the expected condition of the economy in one year's time. The data show that 41.5 per cent of respondents perceive the current economic condition as average, 33.4 per cent perceive it as bad, while only 25.1 per cent perceive it as good. However, 38.7 per cent of respondents think that the current economic condition is better compared to the previous year, exceeding those who think that there has been no change (28.8 per cent) and those who think that it is worse (32.4 per cent). When asked about the outlook for the economy in one year's time, 60.1 per cent think that it will be better, exceeding by a large margin those who think that there will be no change (27.5 per cent) and those who think that it will be worse (12.3 per cent) (Figure 9). Thus, while respondents may seem slightly pessimistic about the current state of the economy, they are more optimistic in comparing the economy to the previous year when the COVID-19 pandemic was hitting the global economy hard, including Indonesia, and when forecasting the performance of the economy for the year to come.

The survey also asked respondents to evaluate their current household economic condition, compare it to the previous year, and give their forecast for the year to come. Overall, their responses are more optimistic

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<sup>16</sup> "Pemerintah Alihkan Subsidi BBM Agar Lebih Tepat Sasaran", Humas Sekretariat Kabinet Republik Indonesia, 3 September 2022, <https://setkab.go.id/pemerintah-alihkan-subsidi-bbm-agar-lebih-tepat-sasaran/> (accessed 18 October 2022).

**Figure 9: Evaluation of Economic Condition (Country)**



than their assessment of the national economy. The survey found that 29.9 per cent of respondents perceive their current household economic condition to be good, higher than those who perceive their household economic condition to be bad (22 per cent). Furthermore, a much higher percentage of respondents (44.1 per cent) perceive their household economy this year to have been better, compared to those who perceive it as worse (21.5 per cent). More strikingly, optimism for the next year is very high—71.5 per cent expect the household economic condition to be better in one year’s time (Figure 10). This optimism shows that respondents are expecting the economy to recover from the impact of the pandemic, and reflects the perception that President Jokowi’s handling of the economy will bring real benefits to individual households. Yet again, the qualification is that the economic optimism captured in this survey may have since been tempered by the September 2022 fuel price increase, global inflationary pressures, and the threat of recession in 2023, which have flooded the news and been captured in statements by President Jokowi and Finance Minister Sri Mulyani.<sup>17</sup>

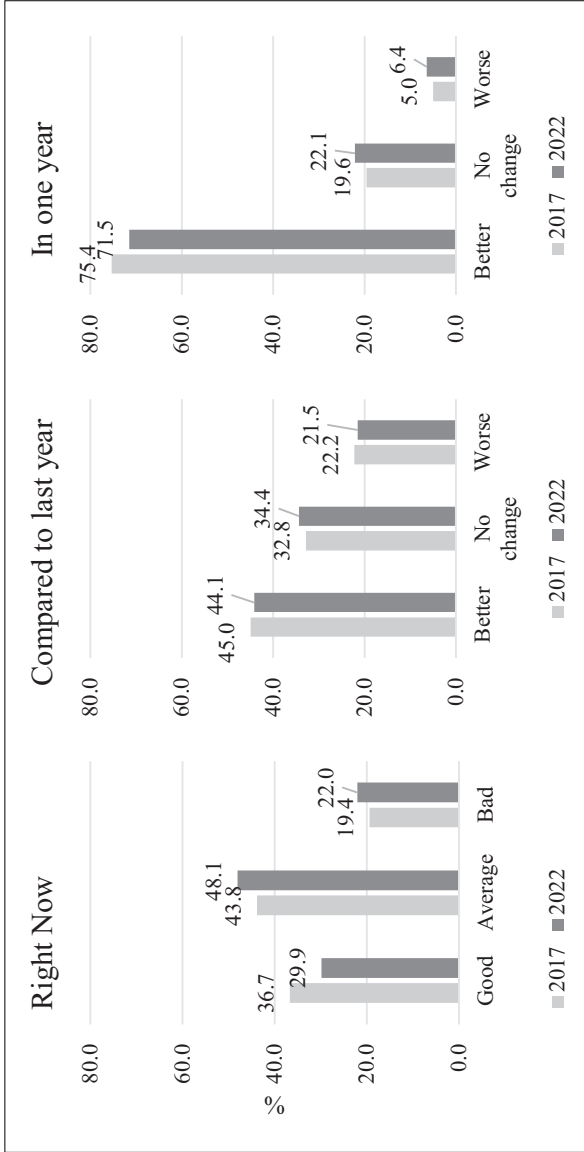
### *3.2 Economic Policy*

In this survey, among the six economic indicators assessed by respondents when asked for their comparison to the previous year, the one that receives the most positive assessment is the state of economic growth: those who rate it as better compared to the previous year are 37.2 per cent. Meanwhile, one of the factors that is considered to be negative is the cost of living (inflation), with 43.6 per cent of respondents rating it as being worse than it was the previous year. Also, unemployment and poverty receive a negative assessment, whereby 59.5 per cent of respondents perceive unemployment as being worse and 42 per cent see poverty as worse compared to the previous year (Figure 11).

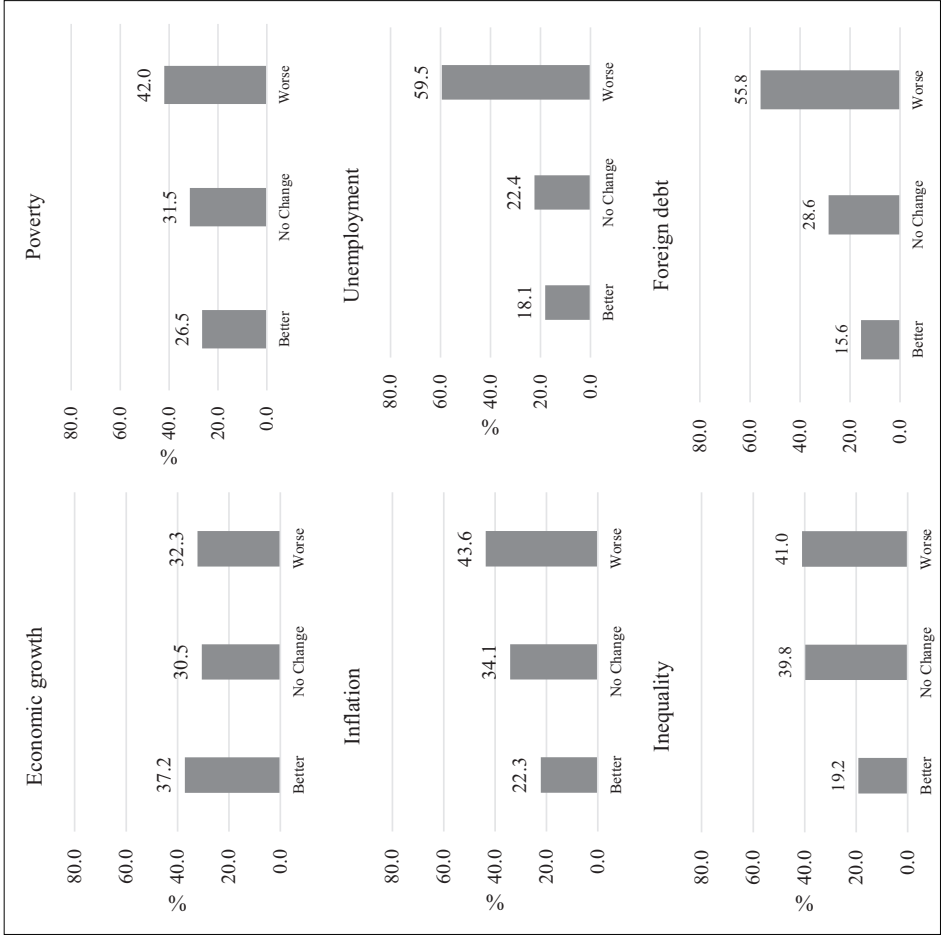
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<sup>17</sup> “Sri Mulyani: Dunia Pasti Resesi pada 2023”, CNN Indonesia, 26 September 2022 <https://www.cnnindonesia.com/ekonomi/20220926163036-532-852840/sri-mulyani-dunia-pasti-resesi-pada-2023> (accessed 18 October 2022).

**Figure 10: Evaluation of Economic Condition (Household)**



**Figure 11: Economic Indicators Assessment Compared to the Previous Year**



When asked about the three most pressing issues for Indonesia to tackle, economic issues appear to have priority. Unemployment tops the list (43.7 per cent), followed by price stability and inflation (35.9 per cent), economic management and growth (33.0 per cent) and poverty (27.0 per cent). Compared to the INSP2017, there is a significant jump in terms of concern over unemployment, inflation, and poverty. This might be due to the economic impact brought about by the pandemic over the last two to three years.

**Table 2: Most Pressing Issues to Be Tackled  
(Multiple Responses)**

	<b>Issue</b>	<b>2017</b>	<b>2022</b>
1	Unemployment/job creation	14.4%	43.7%
2	Price stability and inflation	15.1%	35.9%
3	Economic management and growth	30.4%	33.0%
4	Poverty	17.5%	27.0%
5	Corruption	26.7%	12.5%
6	Infrastructure and transportation	18.3%	12.3%
7	Education	13.4%	11.0%
8	Agriculture, food, fishery	8.3%	10.5%
9	Social welfare	10.8%	9.3%
10	Wages, income, salaries	5.7%	5.8%
11	Crime, law enforcement, security	14.2%	5.4%
12	Foreign policy	0.2%	4.1%
13	Healthcare services	5.6%	3.6%
14	Justice	5.3%	3.1%
15	Pandemic COVID-19	–	2.6%
16	Natural disaster	0.6%	1.6%
17	Drugs	4.1%	1.0%
20	Protecting religious and ethnic minorities	4.4%	0.8%
21	Other issues	24.3%	10.3%

### *3.3 President Joko Widodo's Performance on Economic Issues*

The survey also had questions on respondents' perception of President Jokowi's performance in his second term in relation to the economy. Figure 12 shows that the majority of respondents agree that during President Jokowi's second term, infrastructure has improved (78 per cent), the COVID-19 pandemic crisis has been overcome (68.4 per cent), and the welfare of the poor has improved (53.7 per cent) (Figure 13). However, in terms of tackling unemployment and inflation, more disagree that jobs are easier to find (49.2 per cent) and prices of goods are cheaper (71.5 per cent) respectively. Concerns with these two issues follow the trends observed in the INSP2017; in particular, the disagreement that goods are cheaper has shot up from 47.8 per cent, suggesting that inflation has become an increasingly salient concern for respondents in recent years.

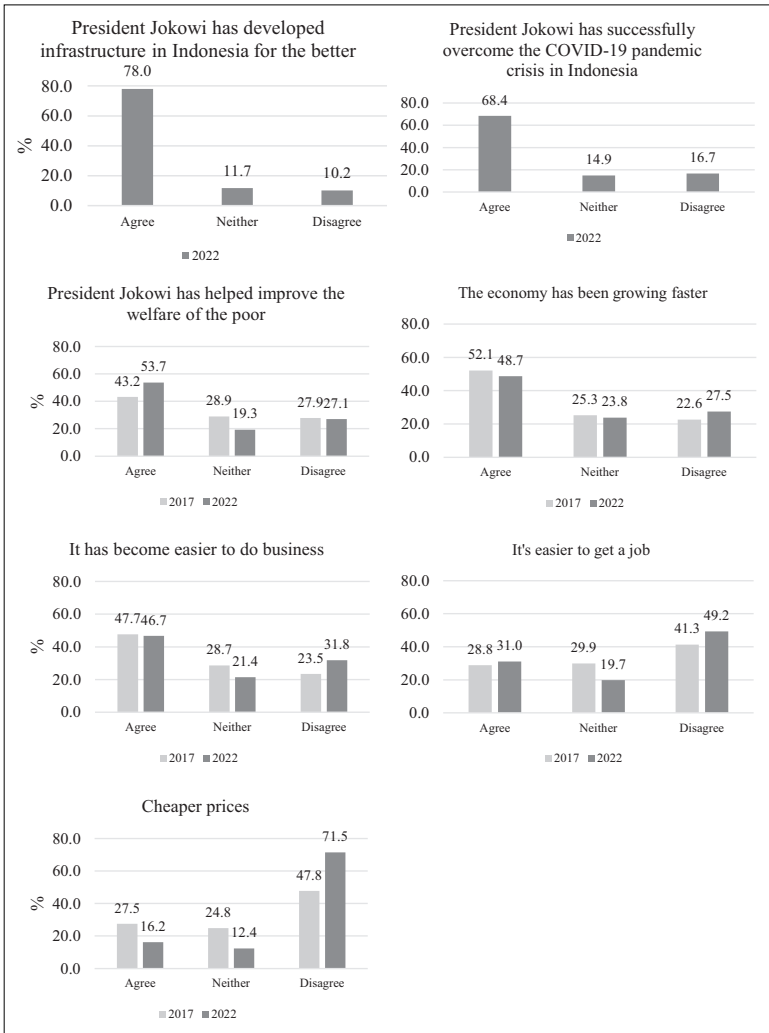
### *3.4 Digital Transformation and Internet Activities*

The development of the digital economy in Indonesia over the last decade has been very rapid. Various start-ups have emerged to penetrate a broad range of sectors, and today, some of these tech start-ups have achieved unicorn and even decacorn status with astronomical valuations.<sup>18</sup> Apart from trade and finance, digital-based community activities have also penetrated the fields of education, transportation, entertainment, and information, in tandem with the expansion of the Internet network throughout Indonesia. Although social activities were disrupted due to the COVID-19 pandemic, the latter has also served as a catalyst for digitally-mediated activities, as is the case for education and workplace arrangements.

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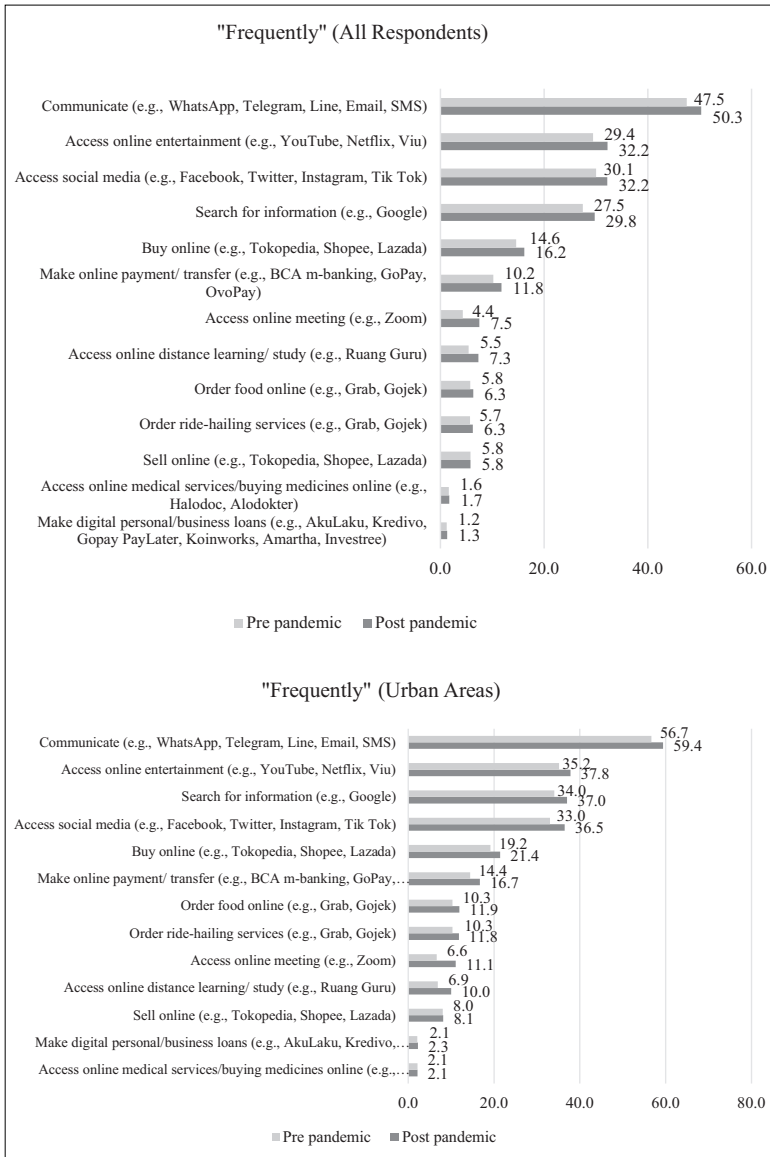
<sup>18</sup> In 2022, Indonesia recorded 14 unicorns (start-up companies with a valuation of more than US\$1 billion), i.e., Gojek, Tokopedia, Traveloka, Bukalapak, OVO, Xendit, Ajaib, Akulaku, JD.ID, Blibli, Tiket, Kredivo, J&T, and Kopi Kenangan. Gojek and Tokopedia merged to form GoTo in 2021, and became the first decacorn (companies valued at more than US\$10 billion) in Indonesia.

**Figure 12: Perception of President Jokowi's Performance on Economic Issues**





**Figure 13: Internet Activities Before and After the Pandemic**



**Figure 14: Communicate Using Internet Post-pandemic by Location, Education and Age**

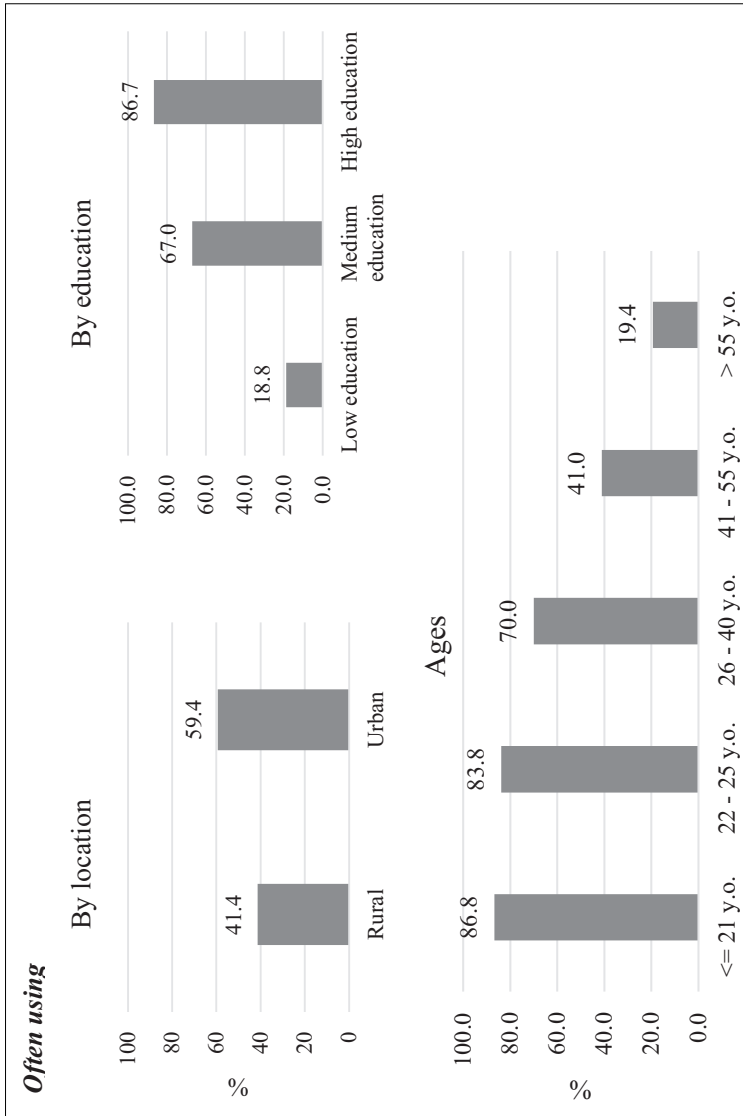
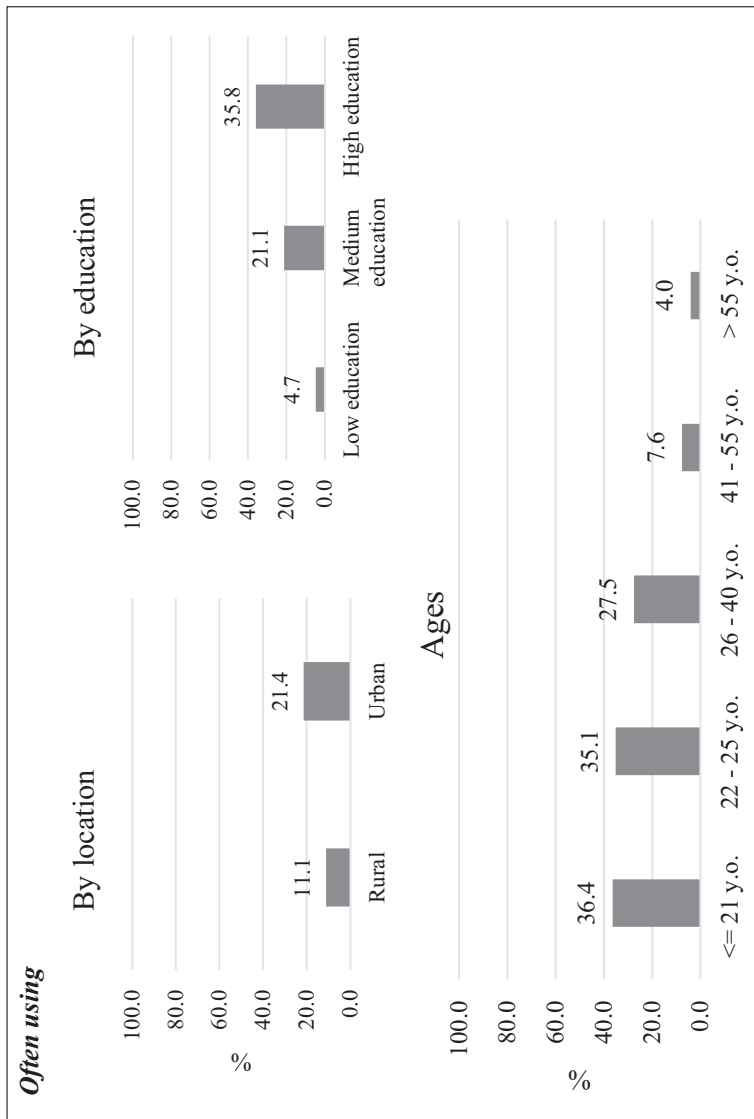
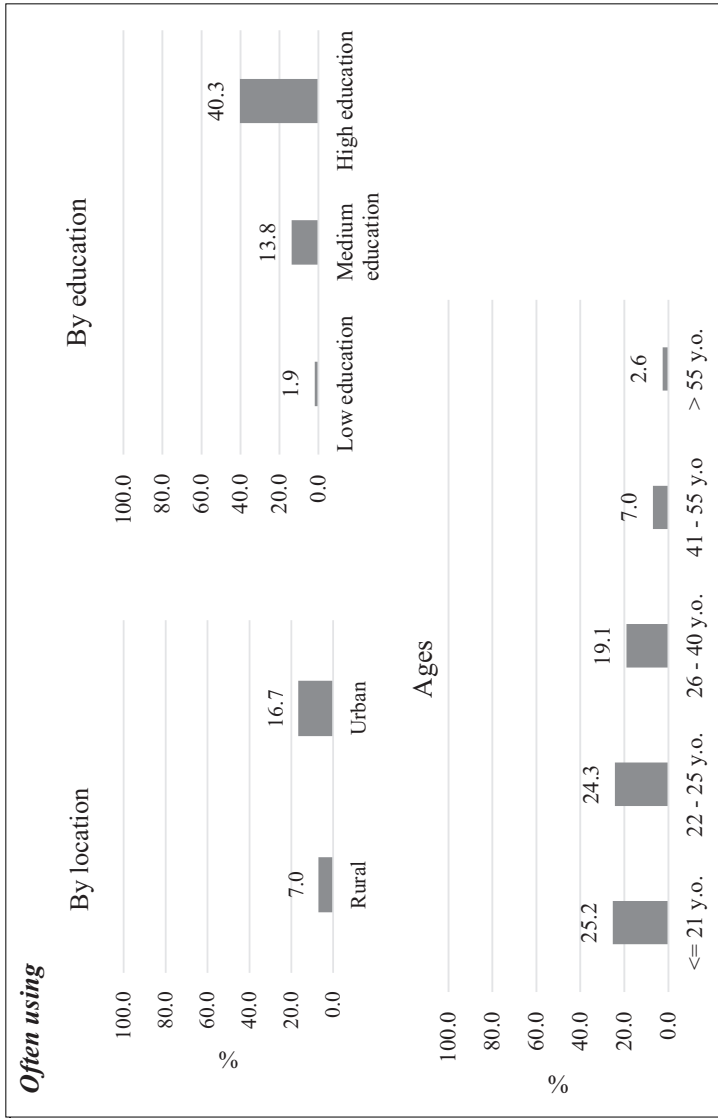


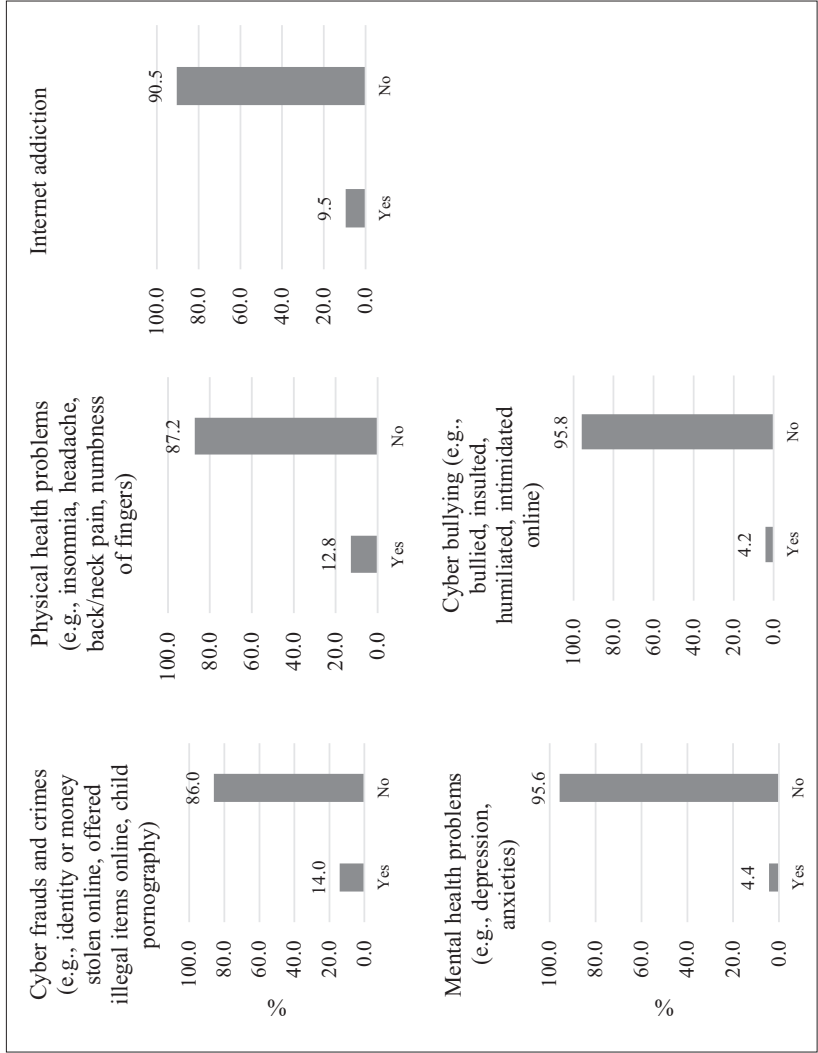
Figure 15: Buy Online (e.g., Tokopedia, Shopee, Lazada) by Location, Education and Age



**Figure 16: Make Online Payment/Transfer (e.g., BCAM-Banking, Gopay, Ovopay) by Location, Education and Age**



**Figure 17: Experience Using the Internet**



The survey finds that respondents who “frequently” carried out Internet-based activities slightly increased since the pandemic, especially when we analyse only urban respondents, who have better Internet access (Figure 13). This slight increase applies across all Internet-based activities.

Unsurprisingly, respondents who “frequently” undertake digital activities tend to live in urban areas, are younger and have higher education. This is the case for those who engage “frequently” in electronic communication (Figure 14), and economic activities like “buying online” (Figure 15) and “making online payment” (Figure 16). Variables such as gender, religion, or ethnicity do not appear to affect this result.

In terms of methods for accessing the Internet, most respondents use data packages (66 per cent), while only 18.2 per cent use broadband and 20.9 per cent use Wi-Fi in public places.

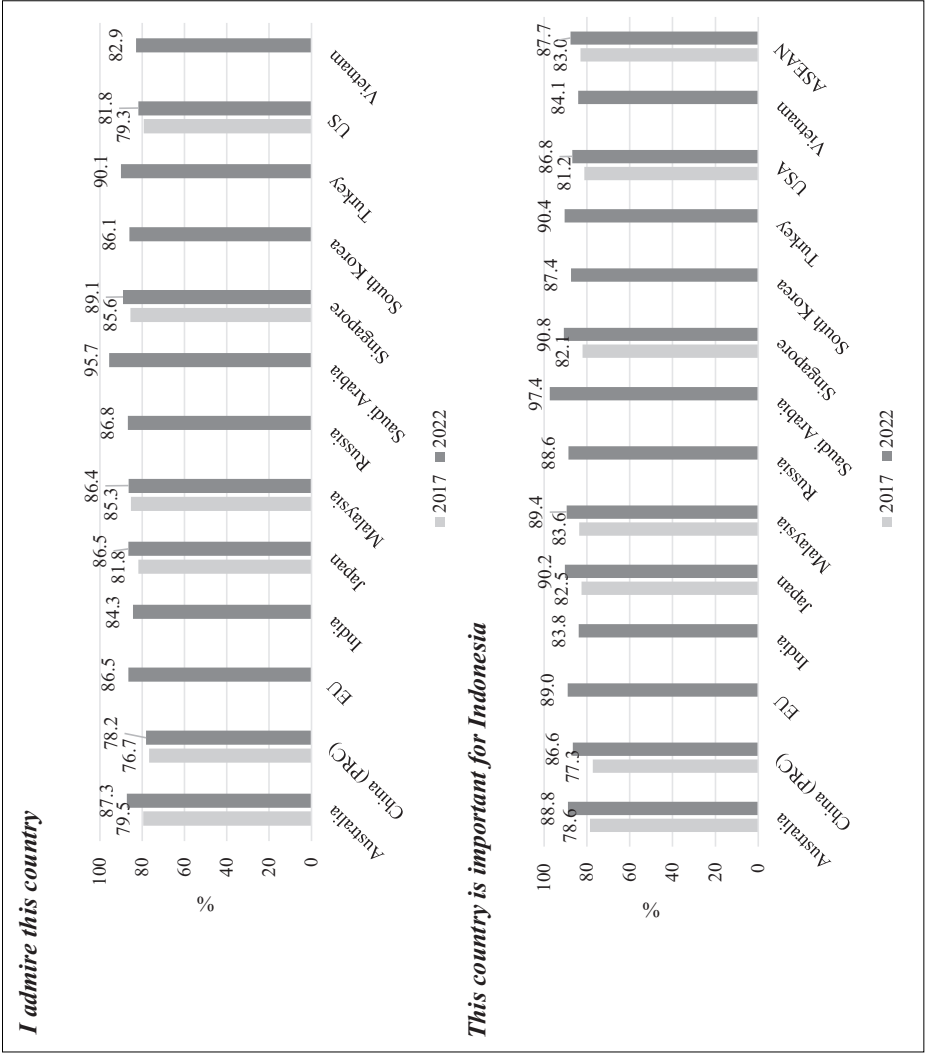
Negative experiences in using the Internet are not dominant, but the most common are cyber fraud and crime (14 per cent), physical health problems (12.8 per cent) and Internet addiction (9.5 per cent) (Figure 17). Despite some negative experiences, a majority of respondents view the Internet as very important. 87.3 per cent agree that the Internet should be made available to all citizens, 67.8 per cent claim to be more productive with the Internet, 72.8 per cent view the Internet as facilitating political expression, and 72.2 per cent admit that goods on the online market are cheaper than on the offline market.

## **4. INTERNATIONAL RELATIONS**

### *4.1 Perceptions of Foreign Countries and ASEAN*

Following the INSP2017, the INSP2022 also surveys Indonesians’ perceptions of other countries. However, considering the geopolitical situation and recent trends, the list of foreign countries/regions has been updated to include Saudi Arabia, Turkey, Russia, European Union (EU), South Korea, India, and Vietnam (replacing Thailand). Regarding countries that respondents admire, Figure 18 shows that Muslim countries—Saudi Arabia (95.7 per cent) and Turkey (90.1 per cent)—top the list. With the addition of the Muslim countries, Singapore (89.1 per cent) is relegated to third place from first in 2017. In view of the ongoing

**Figure 18: Perception of Foreign Countries and ASEAN**



armed conflict in Europe, it is notable that Russia (86.8 per cent) is more admired than the US (81.8 per cent) and EU (86.5 per cent). Among the reasons why Indonesians admire Russia more than the United States and European Union are anti-American and anti-Western sentiments, based on the perception that America and the West have treated Muslims unfairly, as evidenced in their foreign policy in the Middle East and with regard to the Israeli-Palestinian conflict. In contrast, Russia is viewed as more Muslim-friendly.<sup>19</sup> As with the INSP2017, China (78.2 per cent) remains the least admired by respondents. In considering religion as a variable influencing respondents' admiration for Muslim-majority countries, we find that there is no significant difference in the cases of Turkey and Malaysia. However, regarding Saudi Arabia, Muslims are more likely to express admiration (96.2 per cent) than non-Muslims/others (90.2 per cent).

Respondents are also asked which countries are important for Indonesia. In this regard, Saudi Arabia, Singapore, Turkey and Japan are more likely to be considered important countries for Indonesia. Interestingly, ASEAN is considered less important than the EU but more important than the US, China and India.

#### *4.2 China's Impacts*

In the context of the global rise of China, respondents are asked if they think the rise of China will have a positive or negative impact on neighbouring countries such as Indonesia. While the INSP2017 shows that those who think the rise of China will have a positive impact on Indonesia (41 per cent) are slightly more than those who think it will have a negative impact (39 per cent),<sup>20</sup> the INSP2022 finds a reversal in

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<sup>19</sup> CNN Indonesia, "5 Alasan yang Bikin Banyak Warga RI Dukung Rusia Invasi Ukraina", 14 March 2022, <https://www.cnnindonesia.com/internasional/20220314083053-134-770749/5-alasan-yang-bikin-banyak-warga-ri-dukung-rusia-invasi-ukraina/2>

<sup>20</sup> Fossati, Hui, and Negara, *The Indonesia National Survey Project*, p. 41.



the trend, wherein respondents who perceive a negative impact (34.1 per cent) exceed those who perceive a positive one (27.1 per cent) (Figure 19). Significantly, more respondents are neutral or perceive China's impact as neither positive nor negative (38.8 per cent) compared to 19.7 per cent of respondents who held a similar view in INSP2017. Possibly, respondents have become more guarded in their assessment of the impact of China's rise, and prefer to base their judgement on further outcomes of China's engagement with Indonesia.<sup>21</sup> Although there are reservations about the impact of China's rise, only a small proportion of respondents consider the relationship between China and Indonesia to be bad (11.5 per cent), while 43.1 per cent consider it to be good, and 45.4 per cent consider it to be average.

Respondents are also asked if they think Indonesia can benefit from close economic ties with a number of countries. In this respect, 36.3 per cent think that Indonesia will benefit "a lot" from close economic ties with China, just after Saudi Arabia (57 per cent) and Japan (38.5 per cent), and above the US (34.1 per cent), Malaysia (32.7 per cent) and Singapore (31.9 per cent). This suggests that respondents are cognizant of China's rise as an economic powerhouse and of the benefits that can potentially bring to the Indonesian economy.

#### *4.3 Belt and Road Initiative (BRI)<sup>22</sup>*

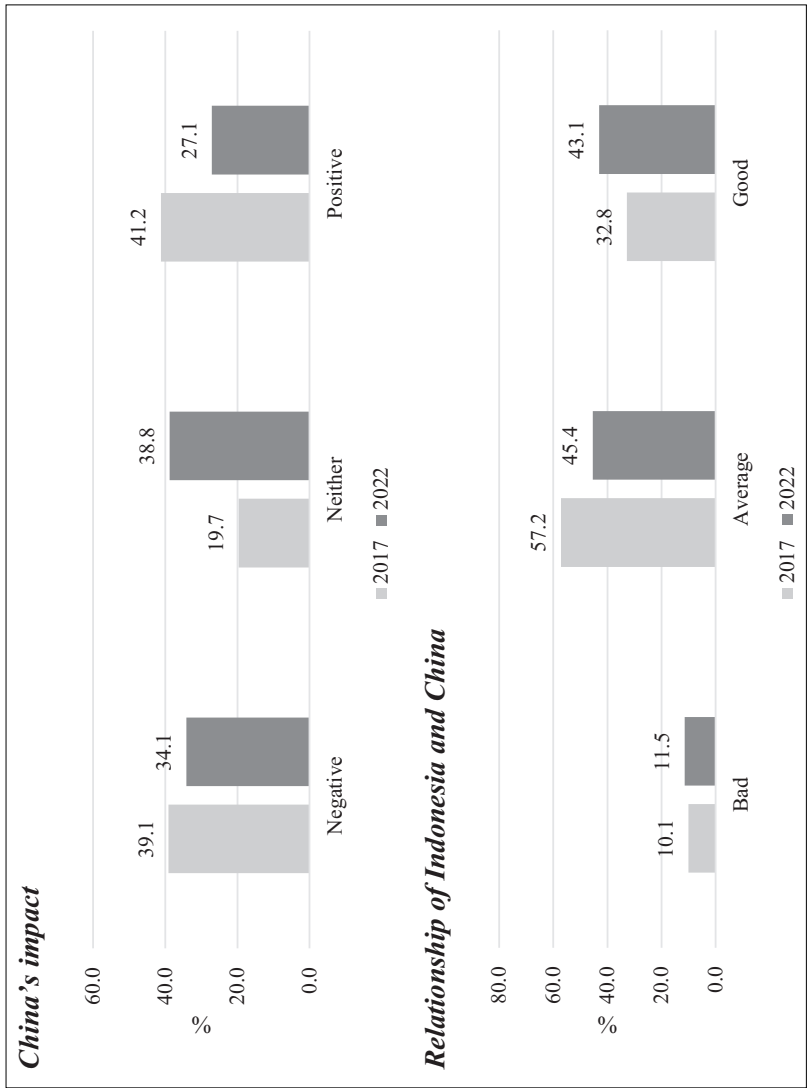
The Belt and Road Initiative (BRI) has been the flagship programme of China's foreign policy under President Xi Jinping. It rivals the US

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<sup>21</sup> A recent study demonstrates that the perceived benefits of a close relationship between Indonesia and China depend heavily on the policies and actions of the Chinese government. If Indonesians are exposed to negative issues such as territorial violations in the dispute over the Natuna Sea or discrimination against Muslim Uighurs, they tend to have a negative view of China. Indonesians tend to view China favorably if they are informed of positive issues such as Chinese investment in infrastructure projects in Indonesia. See Nathanael Gratias Sumaktoyo and Burhanuddin Muhtadi, "China's Foreign Policies and Attitudes toward Chinese Diaspora: A Direct Link?", *International Journal of Public Opinion Research* 34: 1–11.

<sup>22</sup> The INSP2022 is the first survey to ask respondents about their perception of China's Belt and Road Initiative.

**Figure 19: China's Impact and Relationship of Indonesia and China**

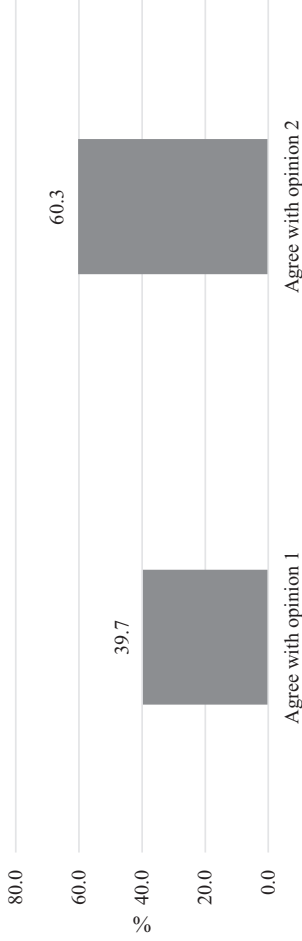


**Figure 20: Belt and Road Initiative (BRI)**

*The Chinese government has a Belt and Road Initiative (BRI) programme to provide loans to developing countries to build infrastructure (toll roads, railways, ports, airports). There are two opinions about the BRI programme:*

*Statement 1: The BRI programme from the Chinese government is an opportunity for other countries, including Indonesia, to develop infrastructure and expand cooperation with China.*

*Statement 2: The BRI programme from the Chinese government will only create a financial debt trap for other countries, including Indonesia, to be heavily indebted to China.*



and other Western countries' global economic and strategic influence by asserting Chinese soft power, especially in developing countries, by offering loans and assistance in developing strategic infrastructure projects, among other overtures. One of the most high-profile projects of the BRI in Indonesia is the Jakarta-Bandung High-Speed Railway project, which is scheduled to be launched in 2023. This survey asks respondents to choose a statement regarding the BRI that aligns with their own opinion. Statement 1 is couched in a more neutral or slightly positive tone: "The BRI programme from the Chinese government is an opportunity for other countries, including Indonesia, to develop infrastructure and expand cooperation with China." Statement 2 is couched in a more negative tone corresponding to the local and global news that has been circulating lately: "The BRI programme from the Chinese government will only create a financial debt trap for other countries, including Indonesia, to be heavily indebted to China."

The survey found that a larger proportion of respondents by far agree with Statement 2 (60.3 per cent) as compared to Statement 1 (39.7 per cent), which means that negative opinion towards China's BRI is strongly evident in this survey (Figure 20). In terms of demographic background, respondents who are male, have higher education and income level, and who are from urban areas and the Banten and West Java region display a higher propensity for holding a negative perception of the BRI.

## **5. SOCIETY**

### *5.1 Islamic Religious Practices*

This subsection looks into the influence of Islam on society, especially in the context of Indonesia being a Muslim-majority country. Muslims constitute 91.1 per cent of the sample, and their responses are what we examine here.

The majority of Muslim respondents "often" or "always" carry out their obligatory acts of worship, such as fasting during the month of Ramadan (93 per cent), performing the obligatory daily prayers (80.2 per cent), and observing Friday prayers (47 per cent, but if we only consider men, the figure rises to 83.7 per cent). Meanwhile, in terms of paying tithe (*zakat mal*) and giving alms, 53.8 per cent and 70.9 per cent "often"

or “always” observe these practices respectively. In contrast, due to the high cost of performing the *haj* and *umrah*, more than 90 per cent of Muslim respondents have never performed these pilgrimages.

The majority of Muslim respondents (69.8 per cent) are of the opinion that all Muslim women should wear the Islamic headscarf or *hijab*, while 22.3 per cent leave the decision to the individuals, and 8 per cent feel that Muslim women do not have to wear the *hijab*. Interestingly, the view that Muslim women must wear the *hijab* is slightly more likely to be held by female than male respondents, and by rural respondents and respondents of low and medium income (Figure 21).

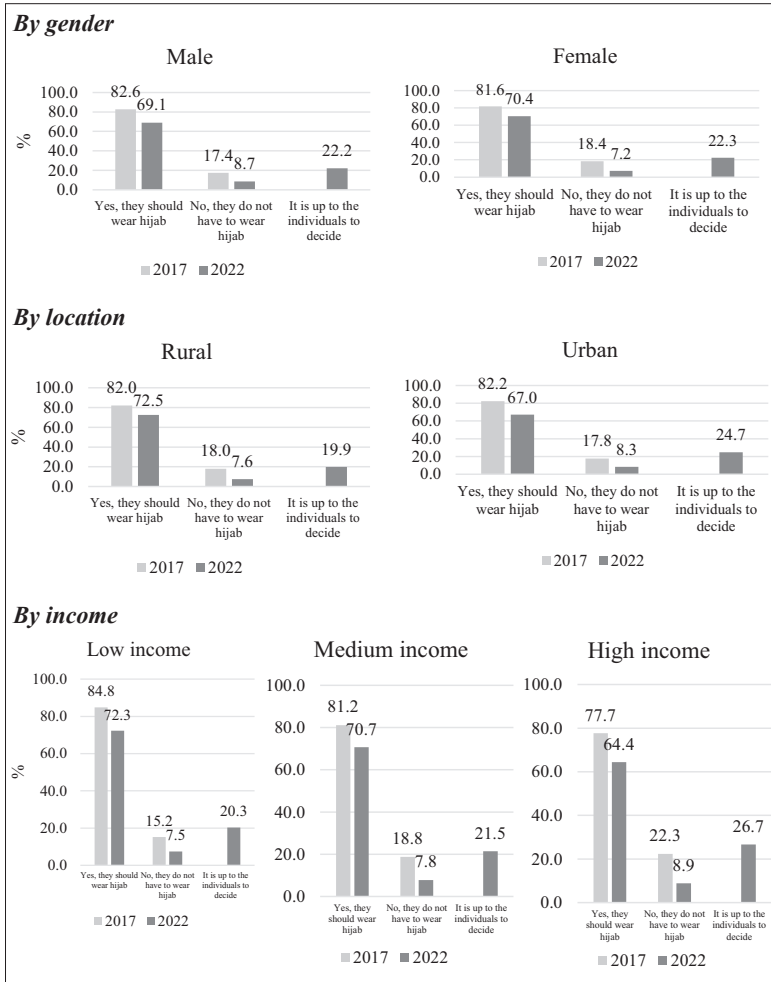
In terms of practice, 61.9 per cent of Muslim women respondents claim that they usually wear the *hijab*, while 34.9 per cent wear the *hijab* depending on the situation, and only 3.3 per cent do not wear the *hijab* (Figure 22).

The majority of Muslim respondents (88.6 per cent) agree that implementing Islamic law will bring benefits to society, especially in terms of strengthening moral values (62.5 per cent), although this latter figure has dropped from 67.2 per cent as per the INSP2017 (Figure 23). Other perceived benefits, such as the spread of Islam (11.8 per cent), increasing public security (8.9 per cent), and helping to eradicate corruption (5.4 per cent), approximate the level of responses for the INSP2017. Meanwhile, 11.4 per cent of respondents are convinced that the application of Islamic law brings very little or no benefit.

In terms of challenges faced by Islam, internal division is the most salient, as evidenced by the overriding concern about debate among Muslims being too divisive (55.5 per cent, as compared with 42.7 per cent in 2017) (Figure 24). There is also some concern over Islamic leaders being too involved in politics (19.1 per cent), although this has decreased from 20.6 per cent in 2017.

In terms of consumption of halal products and services, respondents tend to insist on consuming halal food (92 per cent), followed by schools and education (48.4 per cent) at a distant second. What is also noteworthy is that across all categories of halal products and services, including music, banking, cosmetics, health services, magazines and housing, consumption rates for 2022 have risen slightly compared to 2017 (Figure 25).

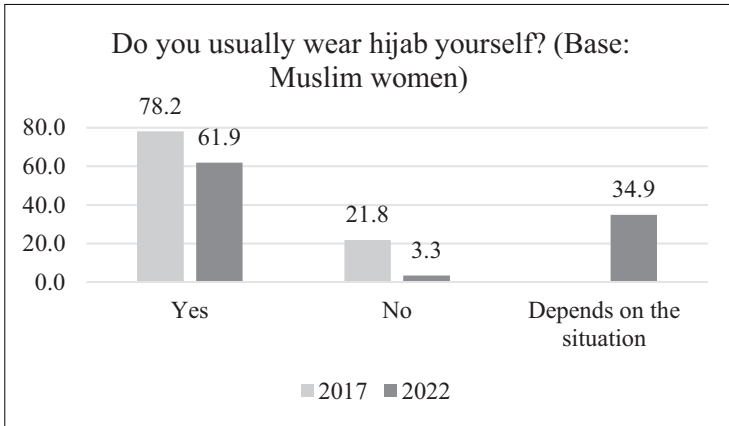
**Figure 21: Should All Muslim Women Wear the Hijab?**



### 5.2 Islam in Society and Politics

Even though Indonesia has the largest Muslim population in the world, respondents do not necessarily seek a dominant position for Islam in the life of the nation. This is evident in the proportion of respondents

**Figure 22: Do You Usually Wear Hijab Yourself?**

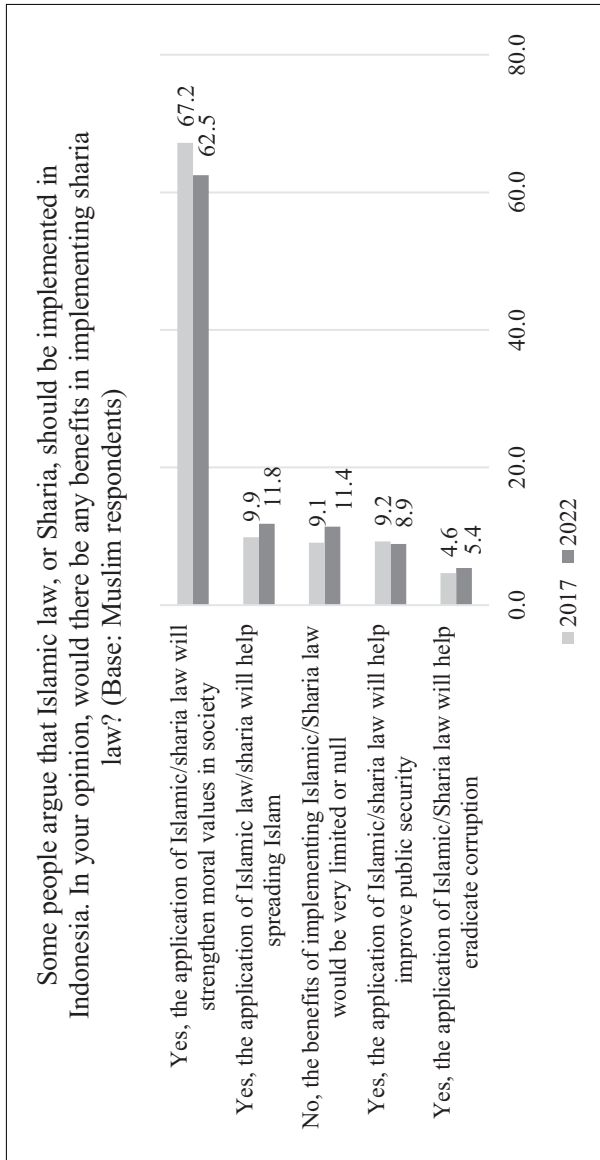


that support Indonesia becoming an Islamic country (34.4 per cent), the implementation of Sharia law at the national level (34.1 per cent), and Islam becoming the only official religion (31.4 per cent) (Table 3). In fact, the proportion of Muslim respondents that disagree with these propositions is larger, at 42.1 per cent, 41.9 per cent and 45.8 per cent respectively.

Corresponding to the above, the majority of respondents agree that Pancasila is an ideology that is in line with Islam (73.8 per cent), and with the dissolution of Islamic organizations that are considered dangerous (66.7 per cent). Nevertheless, respondents are more likely to agree about choosing Muslim leaders through elections (62.1 per cent), although fewer are keen on religious leaders (*ulama*) becoming more influential in political life (41.1 per cent).

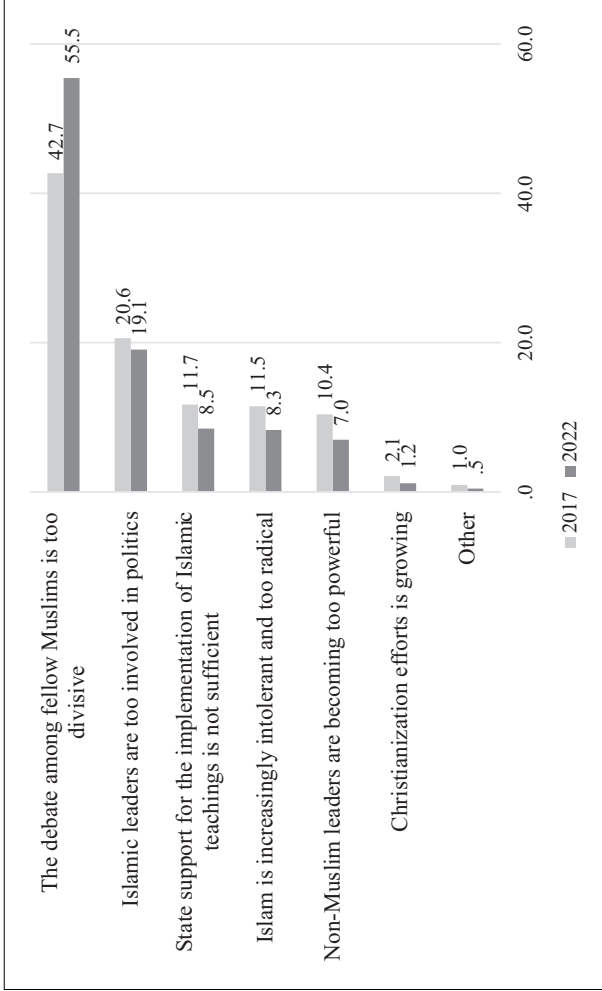
Notably, respondents agreeing that blasphemy against Islam should be punished more severely than blasphemy against other religions have dropped from 63 per cent in the INSP2017 to 40.9 per cent in the INSP2022. This is understandable as the INSP2017 was conducted in the wake of the blasphemy case against Basuki Tjahaja Purnama, then governor of Jakarta. The current findings show that issues of religious blasphemy are much less salient now.

**Figure 23: Islamic Law/Sharia**

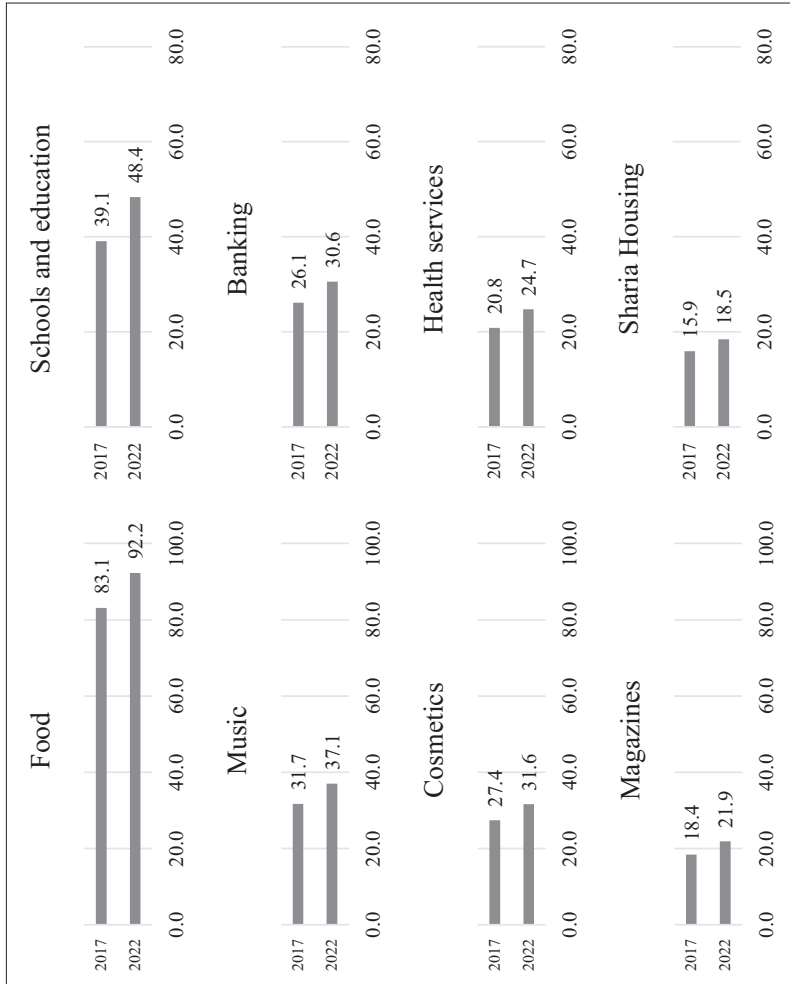




**Figure 24: What Is the Most Important Challenge Facing Islam in Indonesia?**



**Figure 25: Buying Halal Products and Services**



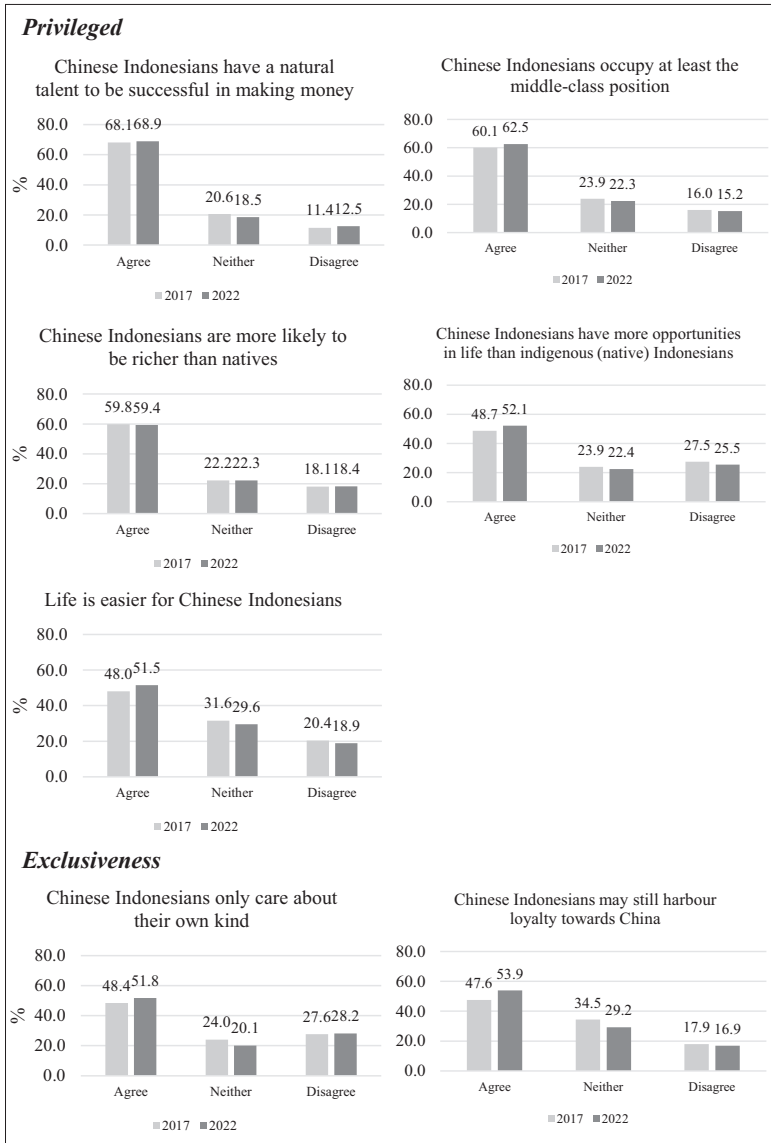
**Table 3: Islam and the State**

	<b>Item</b>	<b>Support (%)</b>
1	Pancasila is in line with Islam	73.8
2	It is fine to outlaw some Islamic organizations (e.g. Hizbut Tahrir Indonesia, Front Pembela Islam) if the government considers them dangerous	66.7
3	When voting in elections, it is very important to choose a Muslim leader	62.1
4	The government should prioritize Islam over other religions	49.0
5	Islamic religious leaders should play a very important role in politics	41.1
6	Blasphemy against Islam should be punished more severely compared to blasphemy against other religions	40.9
7	Indonesian regions should be allowed to implement sharia law at the local level	38.4
8	Indonesia should be an Islamic state	34.4
9	Sharia law should be implemented at the national level in Indonesia	34.1
10	Islam should become Indonesia's only official religion	31.4

### *5.3 Chinese Indonesians*

The INSP2022 continues to examine what indigenous Indonesians think of Chinese Indonesians through a list of long-held prejudicial statements to measure the degree to which these sentiments are still held. The first set of statements suggests that Chinese Indonesians are privileged. As with the INSP2017, for all statements, those that agree exceed those that disagree (Figure 26). At the same time, for all statements except one, the proportion of respondents who agree is marginally higher for the INSP2022 as compared with the INSP2017.

**Figure 26: Stereotypes of Chinese Indonesians**



*continued on next page*

**Figure 26 – cont'd**



The second set of statements deals with the perception that Chinese Indonesians tend to be exclusive. For every statement except the one on intermarriage, respondents for the INSP2022 that agree are proportionately higher. In fact, those who agree that “Chinese Indonesians only care about their own kind” and “Chinese Indonesians may still harbour loyalty towards China” have tipped over 50 per cent, even though, where the latter is concerned, almost all Chinese Indonesians are Indonesian citizens. Meanwhile, respondents who disagree that “it is inappropriate for indigenous Indonesians to inter-marry with Chinese Indonesians” have increased from 35.8 per cent to 37.5 per cent, and this remains the only statement where those who disagree exceed those who agree. Thus, while Chinese Indonesians continue to be perceived as being largely exclusive, indigenous Indonesians are increasingly willing to accept inter-marriage with them.

The third set of questions measures the perception of Chinese Indonesians’ influence. In terms of both the economy and politics, more respondents in the INSP2022 agree that Chinese Indonesians have too much influence. Significantly, the proportion of respondents who agree that “Chinese Indonesians have too much influence in Indonesian politics” has increased from 41.9 per cent in 2017 to 50.8 per cent in 2022. This may be due to the increasing visibility of Chinese Indonesian participation in electoral politics following Indonesia’s political liberalization post-1998.

Tolerance of Chinese Indonesians taking positions of political leadership tends to be low; the majority of respondents (more than 70 per cent) “object” or “strongly object” to Chinese Indonesians taking political office (Table 4). This is more so for directly elected leaders who hold executive powers. Thus, for the most important political positions in Indonesia—President and Vice President—respondents who “object” or “strongly object” exceed 80 per cent.

#### *5.4 Papua Issue*

As the only region in Indonesia where there is still a pro-independence movement, issues in Papua seem less well known to the general public at the national level. Although 34.2 per cent of respondents are quite or

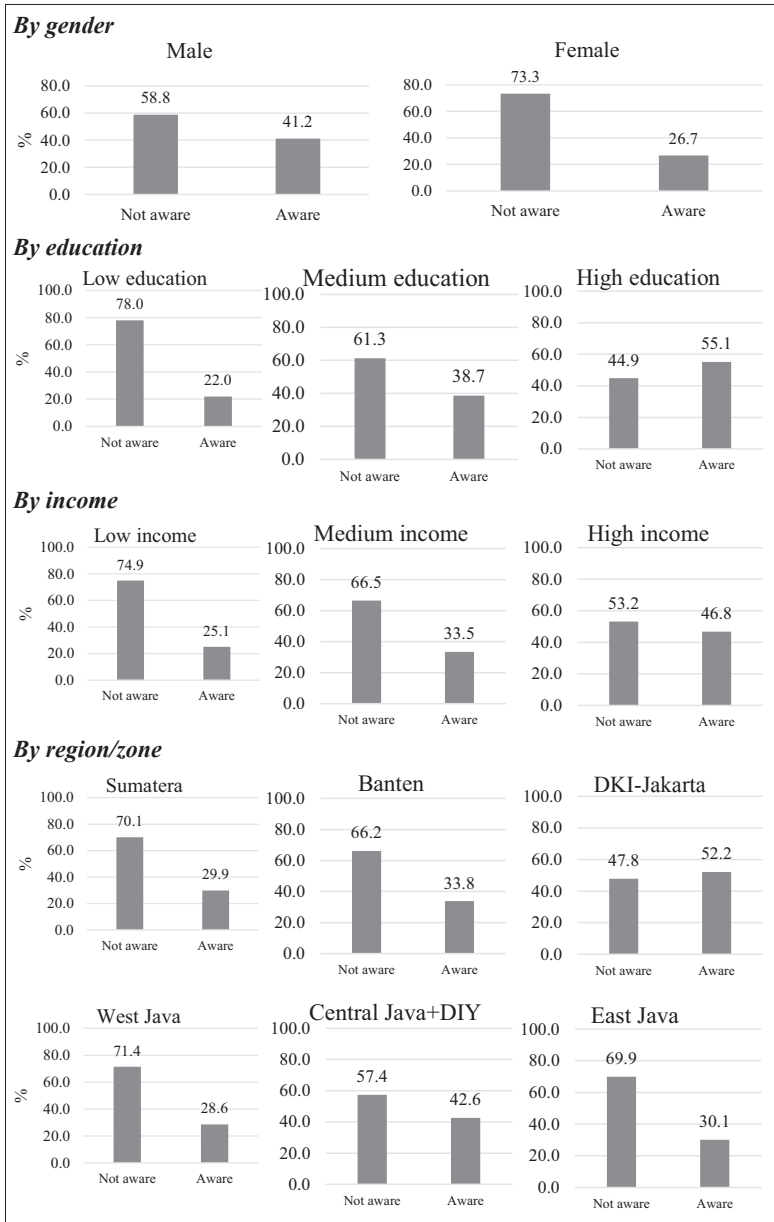
**Table 4: Tolerance for Chinese Indonesian in Political Leadership Positions**

	<b>Item</b>	<b>Uncomfortable %</b>
1	Chinese Indonesian becomes President	84.0
2	Chinese Indonesian becomes Vice President	80.7
3	Chinese Indonesian becomes Governor	78.1
4	Chinese Indonesian becomes Mayor/Regent	77.8
5	Chinese Indonesian becomes Cabinet Minister	72.5
6	Chinese Indonesian becomes regional parliament member (DPRD Level I and II)	70.2
7	Chinese Indonesian becomes national parliament member (DPR)	70.1

very aware of the situation in the Papua region, the majority (65.9 per cent) know little or not at all aware about the situation. Respondents who are male, have higher education and have higher income are more likely to be aware of the issues related to Papua. Unsurprisingly, only the DKI Jakarta and Maluku Papua regions have a majority of respondents who are aware of the Papua issues (Figure 27).

To resolve the conflict in Papua, the majority of respondents (70.6 per cent) are more in favour of the government taking the route of negotiations with separatist groups, similar to the approach taken when dealing with the Free Aceh Movement in the past (Figure 28). However, a comparable majority (64.3 per cent) also agree with using violence to eradicate the separatist movement in Papua and maintain the integrity of the Unitary Republic of Indonesia. On whether indigenous Papuans experience discrimination from other ethnic groups, respondents are quite evenly divided among those who agree (36.1 per cent), those who disagree (33.2 per cent), and those who neither agree nor disagree (30.7 per cent).

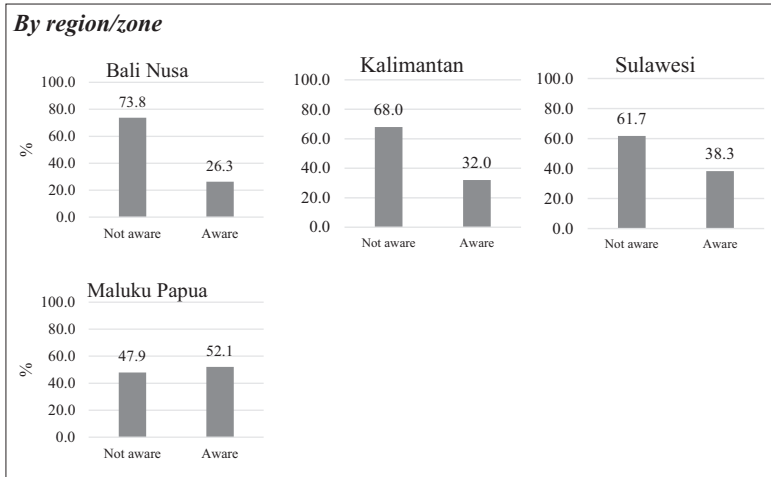
**Figure 27: Awareness of Papua Issues**



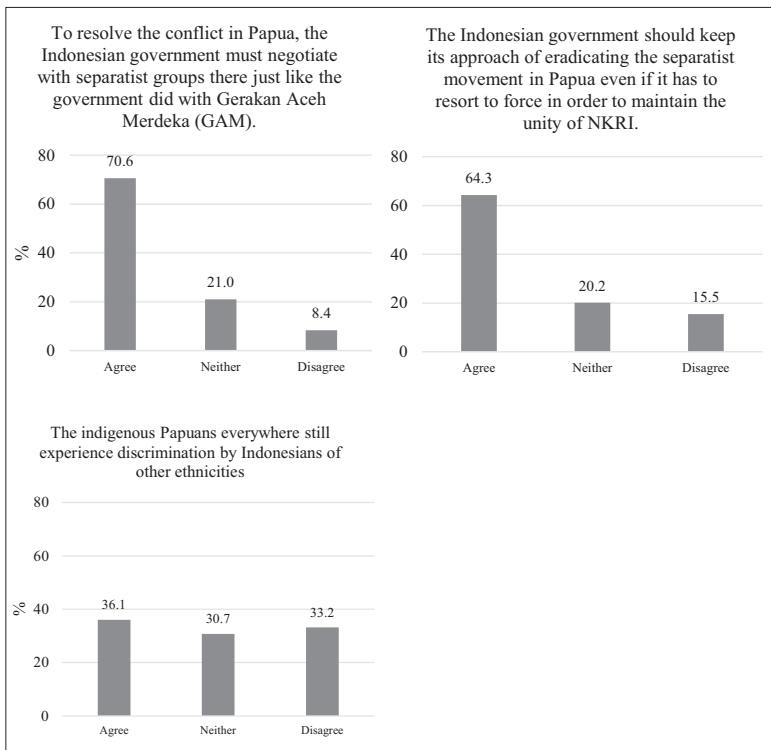
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**Figure 27 – cont'd**



**Figure 28: Attitude on Papua Issues**



## 6. CURRENT ISSUES

### *6.1 Climate Change, Environment, and Energy Transition*

As climate change and environmental issues take the spotlight globally, Indonesians have also become increasingly aware of them. The INSP2022 added a series of questions related to awareness and knowledge of climate change and environmental issues, as well as attitudes towards energy transition as a means of addressing these issues.

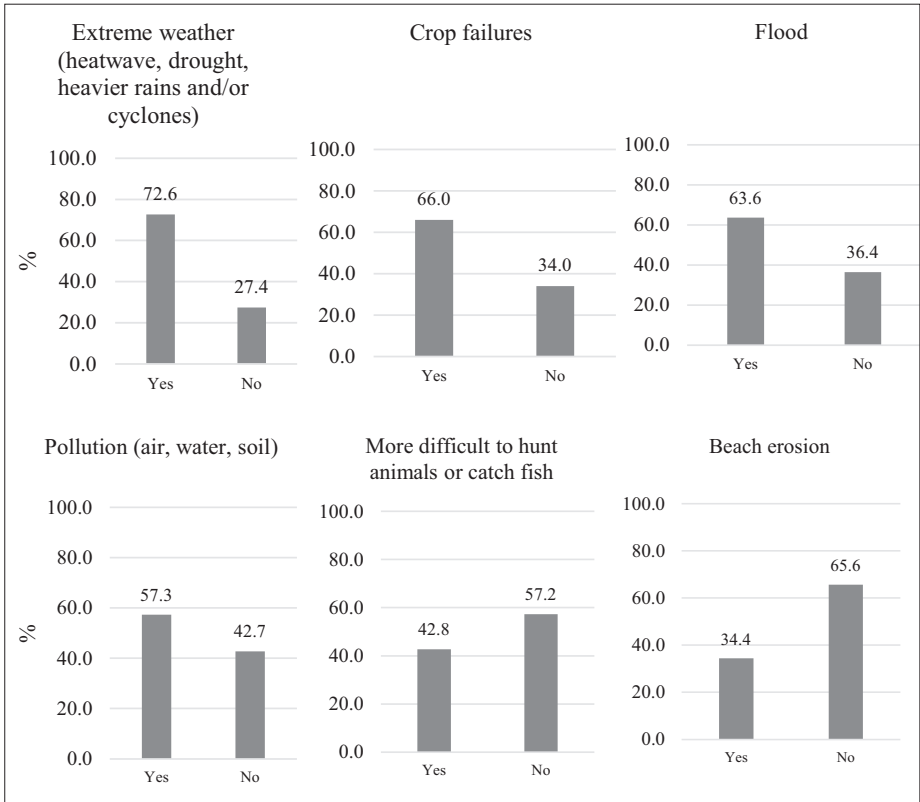
Respondents are asked for their perception of the frequency of certain environment-related events that have an impact on their lives, and the majority observe that extreme weather (72.6 per cent), crop failure (66 per cent), floods (63.6 per cent) and pollution (57.3 per cent) have become more frequent in recent years (Figure 29).

In terms of attribution, certain events are more likely to be considered by the majority to be natural occurrences, such as extreme weather (70.2 per cent), erosion (68.2 per cent), and crop failure (63.4 per cent) (Figure 30). Events that are more likely to be considered wholly or partially man-made by the majority of respondents include pollution (72.6 per cent), floods (68.2 per cent) and difficulty in hunting or fishing (55 per cent). Notably, none of the events is considered by a majority of respondents as being wholly man-made. Even where pollution is concerned, only 30.5 per cent of respondents consider that to be entirely caused by human actions.

The majority of respondents (85.2 per cent) consider climate and environmental problems as urgent problems that need solving. They think that the main parties who should be responsible are the national government, business industry and individual citizens. For this reason, the majority of respondents agree or strongly agree with the government's efforts to overcome climate and environmental problems by requiring private companies to participate in funding the solution to environmental problems (85.7 per cent) and imposing a single-use plastic tax (60.8 per cent).

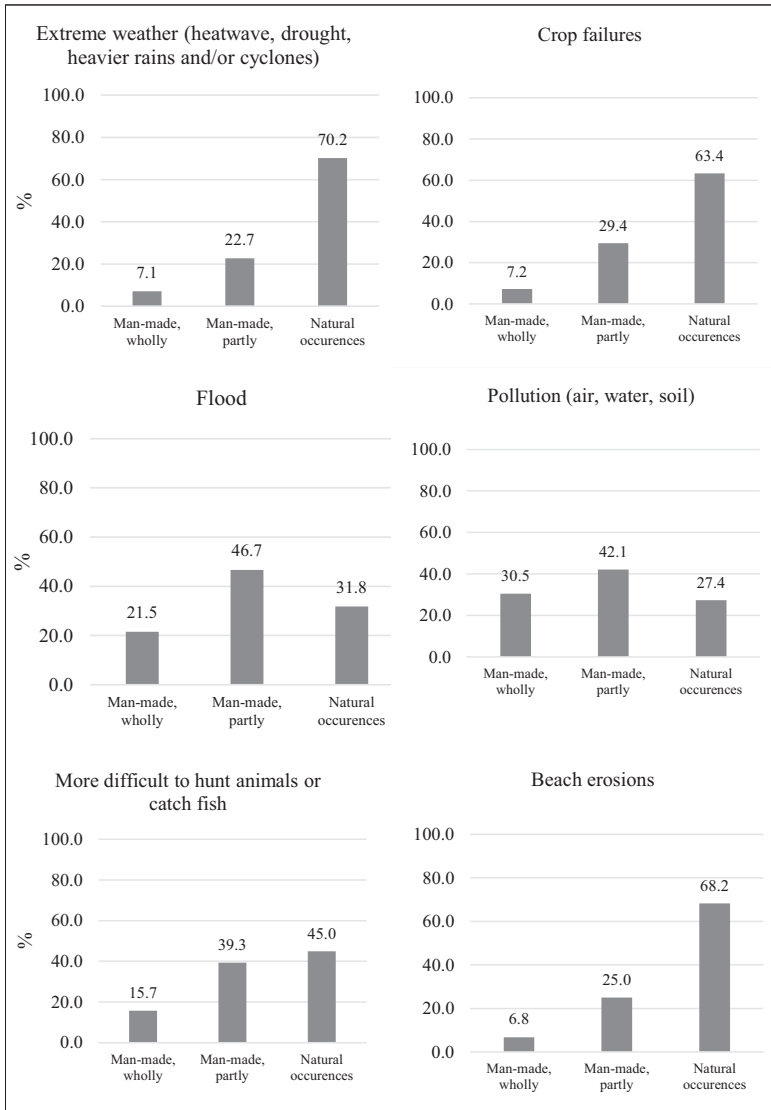
The survey also finds that the majority of respondents support measures that can address climate and environmental problems. These include using cleaner energy sources (75.5 per cent), the use of electric vehicles (63.0 per cent), using solar power instead of electricity generated

**Figure 29: Higher Frequency of Natural Occurrence**



by the State-owned Electricity Company (Perusahaan Listrik Negara, PLN) (61.9 per cent), and reducing the use of fossil fuels (57.2 per cent) (Table 5). In view of this, it may seem contradictory that the majority of respondents agree that the government should keep fuel subsidies (83 per cent), making it politically difficult to reduce dependence on fossil fuels, and increase the adoption of clean energy and electric vehicles at the same time. One way to explain this is that while respondents recognize the need for systematic policies to address climate change and environmental issues, they are less willing to accept sacrifices that involve their personal finances.

**Figure 30: Natural Occurrence vs Man-made**



**Table 5: Energy Transition**

	<b>Item</b>	<b>Support (%)</b>
1	Indonesia must use cleaner energy sources, such as solar, wind, hydropower, and geothermal energy.	75.5
2	Indonesia must support the use of electric vehicles.	63.0
3	If the price was the same, I would be willing to use solar power instead of PLN.	61.9
4	Indonesia must reduce the use of coal, oil and natural gas for the sake of the environment.	57.2

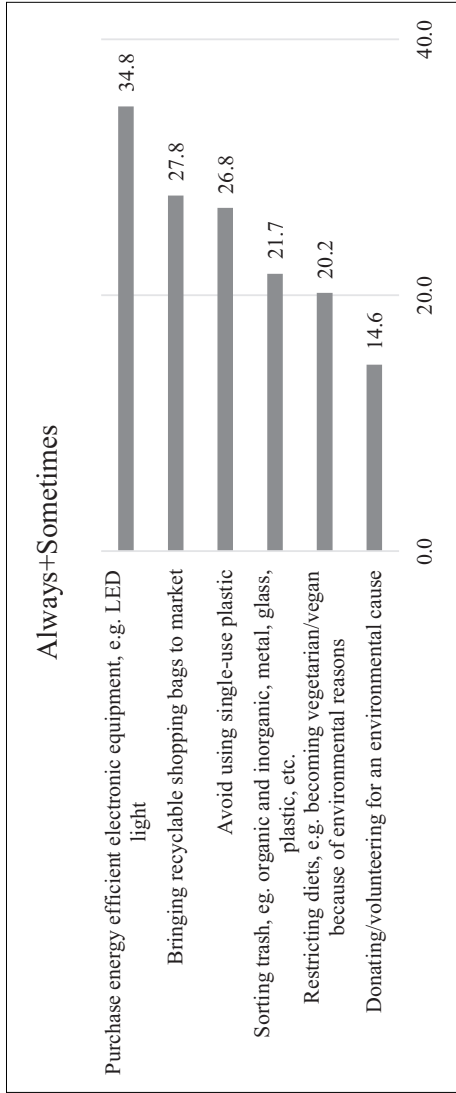
Relatedly, the overwhelming support for the policies listed in Table 5 does not necessarily carry over to personal actions that reduce the impact of environmental damage. Respondents who “always” and “sometimes” make the efforts to carry out environmentally friendly activities, as listed in Figure 31, range from 14.6 per cent to 34.8 per cent. In other words, effecting lifestyle changes that reduce environmental damage will be more challenging than gaining support for environmentally friendly policies.

## **7. CONCLUSION**

The survey covers a wide range of issues, from politics to the economy, foreign relations, and social issues such as the role of Islam and perceptions of Chinese Indonesians. Not all questions are reported in this article, but we have given an overview of the key initial findings.

President Jokowi has a high approval rating of 71.8 per cent, and this comes from almost every segment of the socio-demographic spectrum. Exceptions include the Minangkabau, Sundanese, Betawi, Bugis and Malay ethnic communities, which is unsurprising since they constituted the strong support base of Jokowi’s rival Prabowo Subianto in the 2019 presidential election.

**Figure 31: Environmentally Friendly Activities**



Public trust in state institutions is also high. As is the prevailing trend in post-*Reformasi* Indonesia, the Armed Forces garner the highest level of trust (89.6 per cent). This is followed by Provincial Governments (83.1 per cent), District/City Governments (81 per cent), the Central Government (80.4 per cent), and the President (78.7 per cent). Indonesians tend to be active in participating in voting, where voting in Regional Heads elections, the Legislative Election and the Presidential Election range from 89.4 per cent to 91.5 per cent. Participation in other political activities is much more limited, ranging from 3.2 per cent to 16 per cent for participation in political campaigns, volunteering for candidates, participation in demonstrations or protests, and contributing to a candidate's campaign, etc.

One of the hot-button issues in Indonesia currently is President Jokowi's plan to build a new national capital (IKN). While respondents who are aware of the IKN development programme are large (80 per cent), only 41.9 per cent agree with the programme, and those who rate the programme as urgent are much fewer (28.6 per cent). This indicates that the timing of the project is a concern for Indonesians, especially since the Indonesian economy is still recovering from the impact of the pandemic.

In general, Indonesians are optimistic about the economy. More respondents are likely to think that the current economic condition is better compared to the previous year, and a majority (60.1 per cent) think that the outlook of the economy in one year's time will be better. Perceptions of household economic conditions are also optimistic. More respondents are likely to perceive their current household economic condition to be good and that their household economy this year is better than the previous year. Moreover, a majority (71.5 per cent) think that their household economic condition will be better in one year's time.

The Jokowi administration is deemed to have performed well in infrastructure development (78 per cent), management of the COVID-19 pandemic (68.4 per cent), and improvement of the welfare of the poor (53.7 per cent). However, unemployment, cost of living, and poverty remain key concerns, and the respondents think these three problems should be prioritized in the government's agenda.

When it comes to international relations, the inclusion of Muslim countries in the survey, like Saudi Arabia and Turkey, has led to them topping the list of most admired countries, which shows the importance of Islam in Muslim-majority Indonesia. Another important observation, in the context of the current armed conflict in Europe, is that Russia (86.8 per cent) is more admired than the US (81.8 per cent) and EU (86.5 per cent).

Indonesia has the largest Muslim population in the world. Of the Muslim respondents, the majority are largely practising Muslims who adhere to Islamic religious practices, especially daily prayers, Friday prayers, and fasting during Ramadan. Even though Indonesian Muslims are generally devout, it does not necessarily mean that they harbour the aspiration to make Indonesia an Islamic state. Instead, they are more likely to adhere to Pancasila as the state ideology, and support an inclusive Indonesia.

Where stereotypical perceptions of Chinese Indonesians are concerned, indigenous respondents are marginally more likely to consider Chinese Indonesians as privileged and exclusive (as compared to the results of the INSP2017), although this does not deter them from considering the prospects of intermarriage. A greater concern is with the perception that the political influence of Chinese Indonesians is growing, and the majority of indigenous respondents are not supportive of Chinese Indonesians occupying key political positions.

A topical issue addressed through this survey is the separatist movement in Papua. While the majority of respondents are supportive of resolving the conflict through negotiations, they are also not averse to the use of force if the separatist movement threatens the integrity of the Unitary Republic of Indonesia.

Another set of current issues covered by the survey relates to climate change, environment and energy transition. Events such as extreme weather, crop failure, floods and pollution are perceived to have occurred more frequently, and the majority of respondents are supportive of government policies and efforts to address climate change and environmental issues. However, a major challenge appears to lie in the promotion of lifestyle changes that will reduce damage to the environment.



What has been presented are the major trends, in terms of attitudes and behaviour, with respect to the politics, economy and society of Indonesia. More rigorous analyses, complemented by contextual current debates in the comparative study of democracy, global Islam, populism, and geopolitical rivalry between China and Russia and Western democracies would certainly flesh out the implications of these findings. Forthcoming publications will take up these issues and more, drawing on the data to provide finer analyses than what the current overview allows.

**ISEAS**  
PUBLISHING

30 Heng Mui Keng Terrace  
Singapore 119614  
<http://bookshop.iseas.edu.sg>

ISSN 0219-3213

TRS3/23s

ISBN 978-981-5104-09-7



9 789815 104097