

The State of Southeast Asia:

2020

SURVEY REPORT



Contents

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

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About the Survey

Survey Highlights

Section I

4 **Background of Respondents**

Section II

7 **Regional Security Outlook**

Section III

15 **Major Powers' Regional Influence and Leadership**

Section IV

21 **Geo-Economics and Regional Integration**

Section V

28 **Geopolitics and Regional Architecture**

Section VI

35 **China and US' Engagements with the Region**

Section VII

43 **Perceptions of Trust**

Section VIII

54 **Soft Power**

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 building the ASEAN Community.

About the Survey

For the second year running, the ASEAN Studies Centre at ISEAS-Yusof Ishak Institute conducted *The State of Southeast Asia* survey from 12 November to 1 December 2019. A total of 1,308 respondents from the ten ASEAN member states participated in the 2020 edition of the survey, which seeks to understand the perceptions of Southeast Asians on regional affairs and ASEAN's engagements with its Dialogue Partners, especially the major powers.

The survey which was conducted online drew from a specialised pool of respondents from five professional categories: research, business and finance, public sector, civil society, and the media. The purposive sampling method was used, based on two criteria: respondents must be Southeast Asian nationals and have adequate knowledge of regional affairs as inferred from their profession and job scope. The survey findings are *not* meant to be representative of the extant Southeast Asian view on regional affairs. They do, however, serve to present a general view of the prevailing attitudes among those in a position to inform or influence policy

in ten ASEAN member states on regional political and economic issues.

The survey has eight sections: (1) background of respondents, (2) regional security outlook, (3) major powers' regional influence and leadership, (4) geo-economics and regional integration, (5) geopolitics and regional architecture, (6) China and US' engagements with the region, (7) perceptions of trust, and (8) soft power. The survey contains 58 questions, of which 18 touch on "baseline" issues which were included in last year's survey. The remaining 40 questions, which are highlighted in the report with an asterisk (*), address new issues for the regional discourse in 2020. The findings for the "baseline" questions for the preceding and current years are presented side-by-side to facilitate comparative analysis. We have also taken the liberty to rearrange the ordering of the questions and organise them under new headings to improve the report's clarity and cohesion. For the purpose of readability, the figures in this report are rounded up or down to the nearest one decimal point. ✨

Survey Highlights

1 Domestic political instability (70.5%), economic downturn (68.5%) and the impact of climate change (66.8%) are the region's most pressing security concerns. Terrorism is ranked last (44.6%), right after the concern over increased military tensions emanating from regional flashpoints such as the South China Sea, Taiwan Strait, and the Korean Peninsula (49.6%).

2 With regard to ASEAN, Southeast Asians are most concerned that its tangible benefits are not felt by the people (74.9%). They also share the concern that ASEAN is becoming an arena for major power competition, and its members may become proxies for the interests of a major power (73.2%). Additionally, respondents remain wary that the regional organisation is unable to cope with the fluid political and economic developments (68.6%).

3 Nearly one-third of the respondents (31.3%) believe that ASEAN should continue its position of “not taking sides” in the US-China strategic rivalry. At the same time, close to half of the respondents (48%) advocate the strengthening of ASEAN resilience and unity to fend off pressure from the two major powers. Collectively, these two positions posit a united and strong ASEAN as a pre-requisite for the regional organisation to maintain its autonomy and to avoid entanglement with either major power.

4 If ASEAN were forced to choose between the two major powers, a majority of the total respondents (53.6%) will cast their lot with the US. However, when the respondents are broken down into their nationality, the majority of respondents from seven ASEAN member states (Brunei, Cambodia, Indonesia, Laos, Malaysia, Myanmar and Thailand) favour China over the US.

5 China is seen as the most influential economic and political-strategic power in the region, and outpaces the US by significant margins in both domains. However, China's growing influence is not well-received by the region. Among respondents who view China as the most influential economic power, 71.9% are worried about its expanding influence. This negative sentiment is echoed by respondents who consider China to be most influential in the political and strategic sphere, with 85.4% expressing their concern.

6 The region's confidence in the US is low. Close to half of the respondents (47%) have little or no confidence in the US as a strategic partner and provider of regional security. 77% observe that US engagement with Southeast Asia has declined under the Trump administration compared to the Obama administration. The region looks to Japan (31.7%) and the EU (20.5%) as its preferred strategic partner in response to the perception that US interest and commitment to the region have declined.

7 Japan is the most trusted major power among Southeast Asians, with 61.2% of the respondents expressing confidence in Japan to “do the right thing” to provide global public goods. The EU is the second most trusted partner (38.7%), followed by the US (30.3%) and China (16.1%). India lost out to China by the narrowest of margins, with 16% of respondents having some degree of confidence that India will “do the right thing”.

8 Japan also shines in the soft power domain – defined in this survey in terms of tourism, education and language – as the region's most favoured travel destination (26.2%). Although the US' influence in economics and politics is perceived to be waning, its soft power continues to hold strong attraction, especially in tertiary education. The US is the region's top choice for tertiary education (29.3%).

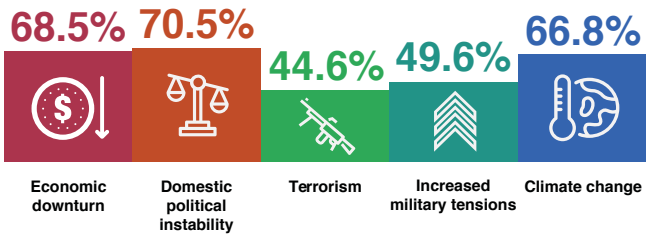
9 The EU is viewed favourably by Southeast Asians. Although 35.4% of respondents fear that the EU is “distracted with its internal affairs”, the organisation remains well respected in three aspects. First, respondents have confidence in the EU for the provision of global leadership – the EU is ranked first (33%) in “maintaining the rules-based order and upholding international law”, and second (25.5%) in “championing the global free trade agenda”. Second, the EU is the second most “preferred and trusted strategic partner” (31.7%) for ASEAN to broaden its strategic options in hedging against US-China rivalry, trailing after Japan (38.2%). Third, EU countries are the second most popular travel destination (19.7%) among Southeast Asians.

10 Most respondents believe that the US-China trade war bodes ill for the global economy with 41.4% worrying that the trade war “will spark a global economic downturn”. Despite news reports suggesting that Southeast Asia is benefitting from the outflows of manufacturing from China, 35.9% opine that their economy has suffered from the trade war in the short term, while 28% believe that the economic repercussions of the trade war will be enduring.

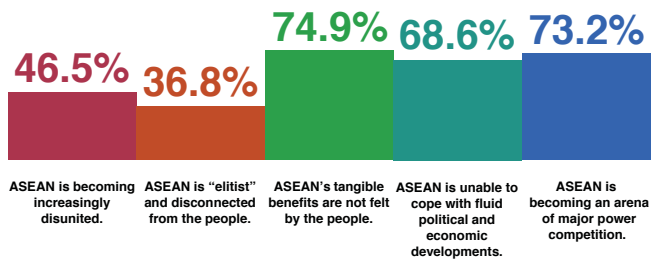
11 The majority of respondents believe that membership in the Regional Comprehensive Economic Partnership (RCEP) should not be limited by geography, with 55.8% supporting its future expansion of “to all qualified parties”.

12 Samsung is the telecommunication provider of choice (38.5%) to build 5G networks in ASEAN member states. Chinese companies are relatively competitive (24.6%) in the region and is the most preferred choice in Laos, Cambodia and Malaysia.

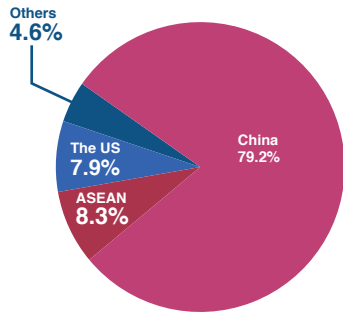
Top 3 concerns for security challenges facing Southeast Asia



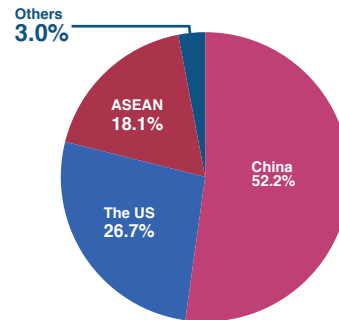
Top 3 concerns about ASEAN



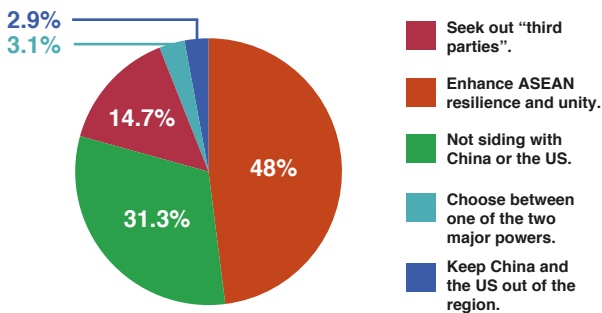
Most influential economic powers in Southeast Asia



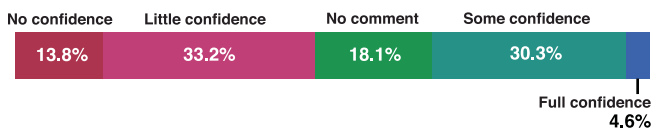
Most influential political and strategic powers in Southeast Asia



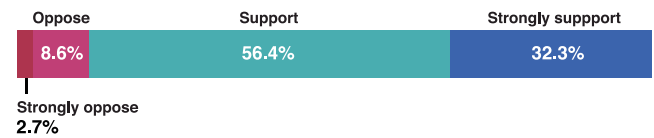
ASEAN's options in US-China rivalry



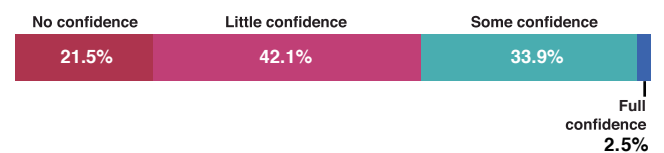
ASEAN's confidence in the US as a strategic partner



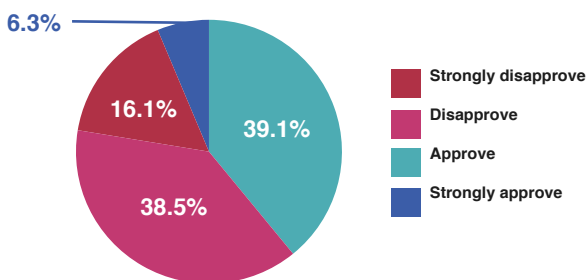
Should ASEAN negotiate a regional FTA with the EU?



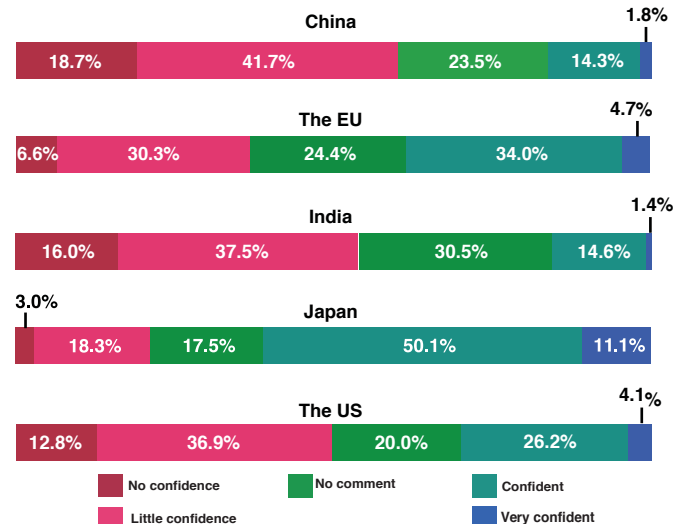
ASEAN's confidence in the BRI



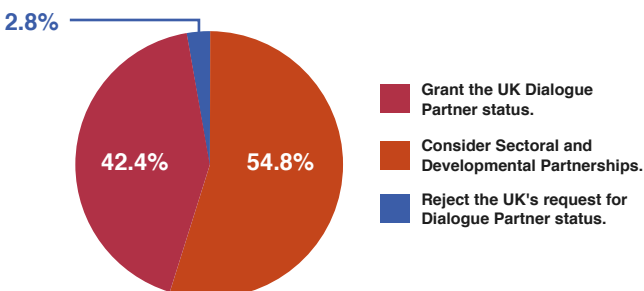
ASEAN's response to the Rakhine crisis



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



ASEAN's response to Brexit

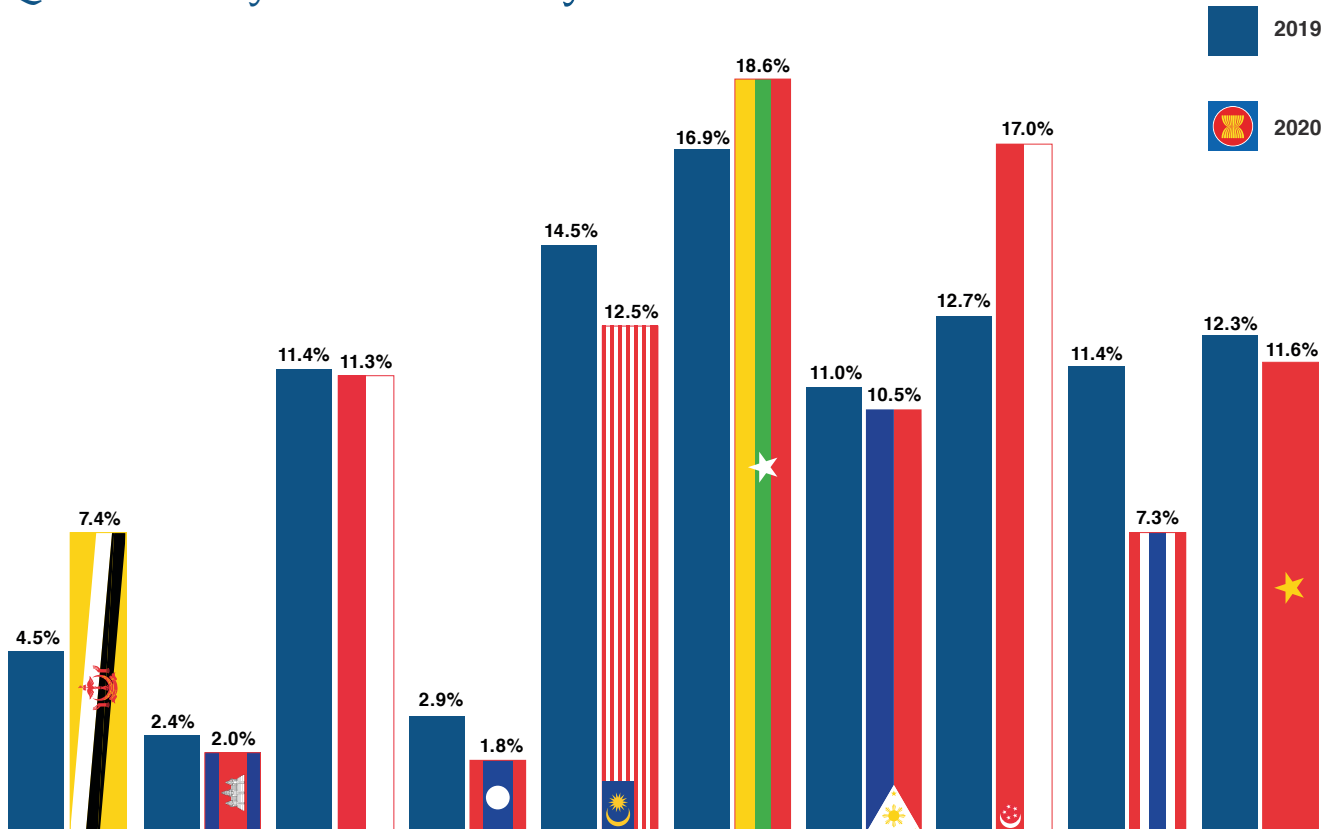


This section features the background of the survey respondents, including their nationality, professional affiliation, and age distribution.

Nationality

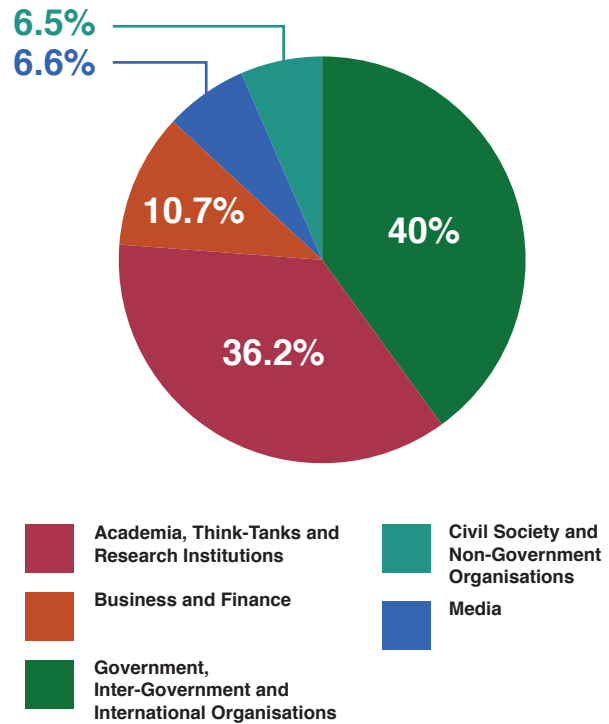
A total of 1,308 respondents from all ten ASEAN member states participated in the 2020 survey, nearly 30% higher than the previous year. Myanmar again has the highest number of respondents at 244 (18.6%), followed by Singapore and Malaysia with 222 (17%) and 163 (12.5%) respondents respectively. Rounding up the list of respondents are Vietnam (11.6%), Indonesia (11.3%), the Philippines (10.5%), Brunei (7.4%), Thailand (7.3%), Cambodia (2%), and Laos (1.8%).

Q1 What is your nationality?



Affiliation

Respondents from the public sector, which include officials of Southeast Asian nationality in government, inter-government and international organisations, overtake academics and think-tankers as the largest group of respondents in the 2020 survey. These officials make up 40% of the respondents, compared to 36.2% from academia and think-tanks, 10.7% from business and finance, 6.6% from the media, and 6.5% from civil society organisations.



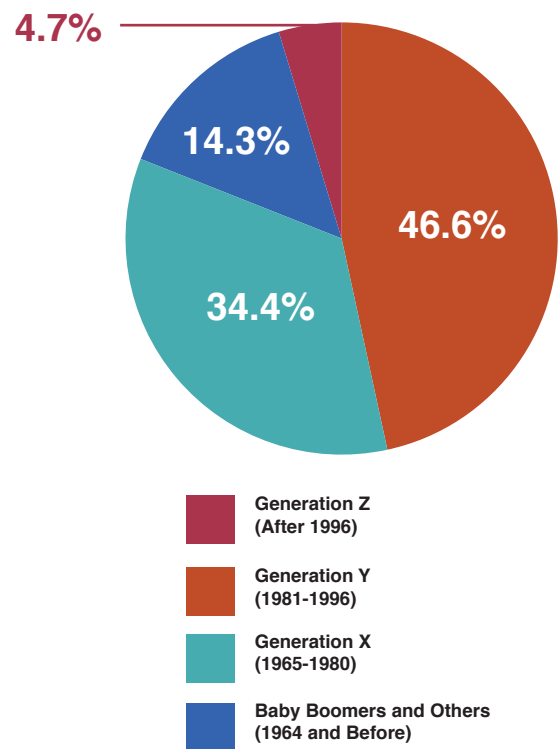
Q2 What is your affiliation?

Country	Academia, Think-Tanks and Research Institutions		Business and Finance		Government, Inter-Government and International Organisations		Civil Society and Non-Government Organisations		Media	
	2019	2020	2019	2020	2019	2020	2019	2020	2019	2020
ASEAN	42.0%	36.2%	10.4%	10.7%	32.9%	40.0%	8.0%	6.5%	6.7%	6.6%
Brunei	28.9%	10.3%	17.8%	8.3%	46.7%	74.2%	6.6%	7.2%	0.0%	0.0%
Cambodia	50.0%	80.8%	8.3%	0.0%	16.7%	15.4%	25.0%	0.0%	0.0%	3.8%
Indonesia	62.6%	52.7%	8.7%	6.1%	18.3%	33.1%	8.7%	7.4%	1.7%	0.7%
Laos	17.2%	34.8%	3.5%	8.7%	58.6%	56.5%	17.2%	0.0%	3.5%	0.0%
Malaysia	54.1%	44.8%	6.2%	6.1%	30.1%	42.3%	4.8%	3.1%	4.8%	3.7%
Myanmar	28.1%	25.0%	12.9%	21.7%	45.6%	35.3%	10.5%	14.7%	2.9%	3.3%
Philippines	46.0%	29.2%	9.9%	1.5%	31.5%	62.0%	5.4%	2.9%	7.2%	4.4%
Singapore	43.7%	37.4%	18.0%	14.0%	12.5%	30.2%	10.2%	4.9%	15.6%	13.5%
Thailand	45.2%	40.6%	7.8%	14.6%	33.9%	25.0%	7.0%	9.4%	6.1%	10.4%
Vietnam	28.2%	39.5%	8.1%	7.2%	46.0%	35.5%	4.0%	1.3%	13.7%	16.5%

Age distribution

This new insertion of “demographic grouping” allows us to analyse differences of perception amongst the various age groups. Four age groups are identified: (a) Generation Z (after 1996), (b) Generation Y (1981-1996), (c) Generation X (1965-1980), and (d) Baby Boomers and Others (1964 and before). Gen Y makes up the largest group of respondents at 46.6%, followed by Gen X (34.4%), Baby Boomers and Others (14.3%), and Gen Z (4.7%).

For this report, the respondents can be divided into two broad categories using the criteria of adult experience and memories of the Cold War. Gen Y and Z fall into the category of the “Post-Cold War” (PCW) cohort, while Gen X and Baby Boomers and Others will be grouped under the “Cold War” (CW) cohort.



Q3 What year range were you born in?*

Country	Generation Z (After 1996)	Generation Y (1981-1996)	Generation X (1965-1980)	Baby Boomers and Others (1964 and Before)
ASEAN	4.7%	46.6%	34.4%	14.3%
Brunei	0.0%	74.2%	24.8%	1.0%
Cambodia	11.5%	53.9%	26.9%	7.7%
Indonesia	2.0%	59.5%	31.1%	7.4%
Laos	0.0%	65.2%	26.1%	8.7%
Malaysia	1.2%	31.3%	48.5%	19.0%
Myanmar	12.3%	41.0%	29.5%	17.2%
Philippines	4.4%	49.7%	29.9%	16.0%
Singapore	0.0%	40.5%	39.2%	20.3%
Thailand	5.2%	40.6%	33.3%	20.9%
Vietnam	7.9%	48.0%	36.9%	7.2%

This section canvasses views on the region’s stability and security, shedding light on the issues and threats that the respondents believe should be on top of ASEAN’s agenda.

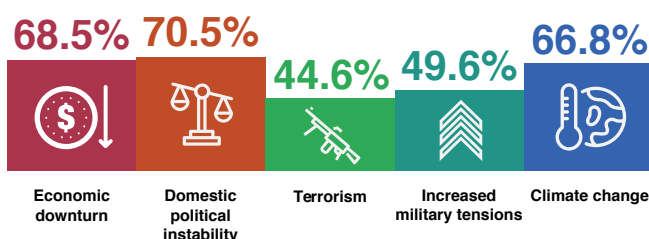
Top three security challenges facing Southeast Asia

Among the five domestic and regional issues presented to respondents, domestic political instability, including ethnic and religious tensions (70.5%), economic downturn (68.5%) and climate change (66.8%) are considered the three most pressing security concerns for the region. Domestic political instability is listed as the paramount challenge by respondents in Cambodia (88.5%), Myanmar (88.1%), Thailand (86.5%), Indonesia (83.8%), Malaysia (81%), and Singapore (67.6%). The top security concern for Laos (91.3%) and Brunei (83.5%) is economic downturn, whereas, rather understandably, Vietnamese (88.2%) and the Philippines (82.5%) respondents choose increased military tensions arising from flashpoints such as the South China Sea as their highest security priority.

The climate change concern (66.8%) continues to gain traction in the region as it is ranked higher than terrorism (44.6%) and increased military tensions arising from flashpoints (49.6%). In fact, the respondents from Brunei, Laos, the Philippines and Vietnam view climate change as the second most pressing challenge. The fact that respondents from all ASEAN member states, except Myanmar, place climate change above terrorism on their security threat barometer is telling. In six ASEAN

member states (Brunei, Cambodia, Malaysia, Singapore, Thailand, and Vietnam), terrorism comes at the bottom of the five-threat list.

The ordering of security concerns in the 2020 findings is identical to the 2019 results: (a) domestic political instability, (b) economic downturn, (c) climate change, (d) increased military tensions, and (e) terrorism. However, the 2019 and 2020 figures are not comparable as the 2020 survey offered five instead of six options by collapsing the “ethnic and religious tensions” into the domestic politics option.



Q4 What are your top 3 concerns for security challenges facing Southeast Asia? (check 3 responses)

Country	Economic downturn		Domestic political instability (including ethnic and religious tensions)		Terrorism		Increased military tensions arising from three potential flashpoints (South China Sea, Taiwan Strait, Korean Peninsula)		More intense and frequent weather events resulting from climate change (droughts, floods, cyclones, rising sea levels, etc.)	
	2019	2020	2019	2020	2019	2020	2019	2020	2019	2020
ASEAN	51.1%	68.5%	53.7%	70.5%	37.2%	44.6%	42.7%	49.6%	51.6%	66.8%
Brunei	80.0%	83.5%	35.6%	52.6%	31.1%	44.3%	46.7%	47.4%	46.7%	72.2%
Cambodia	58.3%	84.6%	75.0%	88.5%	16.7%	7.7%	50.0%	46.2%	50.0%	73.1%
Indonesia	45.2%	72.3%	59.1%	83.8%	42.6%	50.1%	32.2%	33.1%	41.7%	60.1%
Laos	62.1%	91.3%	34.5%	60.9%	41.4%	60.9%	37.9%	21.7%	62.1%	65.2%
Malaysia	63.7%	73.0%	45.9%	81.0%	37.3%	39.3%	39.7%	42.9%	47.3%	63.8%
Myanmar	34.7%	64.3%	64.7%	88.1%	35.3%	59.8%	24.1%	29.5%	45.3%	58.2%
Philippines	38.7%	39.4%	58.6%	43.8%	53.2%	62.0%	62.2%	82.5%	62.2%	72.3%
Singapore	56.3%	66.0%	37.5%	67.6%	46.9%	50.0%	39.8%	53.6%	61.7%	63.1%
Thailand	68.7%	82.3%	78.3%	86.5%	25.2%	21.9%	28.7%	30.2%	42.6%	79.2%
Vietnam	39.5%	72.4%	39.5%	46.1%	26.6%	14.5%	78.2%	88.2%	62.9%	79.0%

Top three concerns about ASEAN

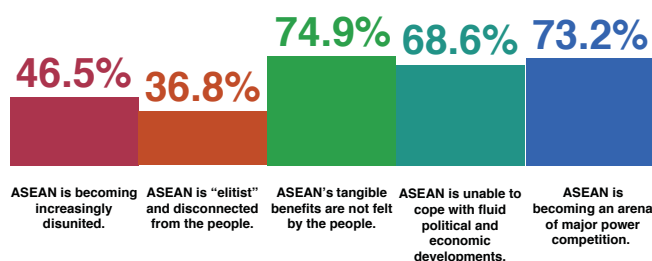
The top three concerns about ASEAN remain unchanged from 2019, but the 2020 data shows increased intensity of attention to these concerns: (a) the tangible benefits of ASEAN are not felt (74.9%), (b) ASEAN is becoming an arena for major power competition and its member states may become proxies for the interest of a major power (73.2%), and (c) ASEAN is unable to cope with fluid political and economic developments (68.6%).

The fact that nearly 3 in 4 respondents do not feel the tangible benefits of ASEAN after 52 years of community-building calls for deep introspection by ASEAN and its member states. An overwhelming majority of respondents in Indonesia (86.5%), Thailand (84.4%), Laos (82.6%), Brunei (80.4%), and Malaysia (78.5%) pick this as their top concern about ASEAN. It should be noted that not “feeling” ASEAN’s tangible benefits does not necessarily equate with ASEAN not “providing” tangible benefits. It might thus be misleading to conclude that ASEAN does not matter whereas the underlying issue may lie in the ineffectiveness of identifying and publicising ASEAN’s work and contributions.

The second most pressing concern about ASEAN across the region – i.e. ASEAN becomes an arena of major power competition and its member states become proxies for the

interest of a major power – is the top concern in Cambodia (96.2%), the Philippines (85.4%), Singapore (83.3%), and Vietnam (72.4%). This concern also registers the highest variance compared to last year, from 62% in 2019 to 73.2% in 2020. The increased attention to this factor is most pronounced in the Philippines (+32.2%), Singapore (+18.5%), Thailand (+18%), and Cambodia (+17%). It is noteworthy that this factor has the least resonance in Indonesia where only 58.8% identify it as one of the top three concerns about ASEAN.

ASEAN’s inability to cope with fluid political and economic developments, which is the third most pressing concern identified by 68.6% of the respondents, remains a fundamental issue for the regional organisation and its members. It is the highest concern among the Myanmar respondents (76.7%).



Q5 What are your top 3 concerns about ASEAN?

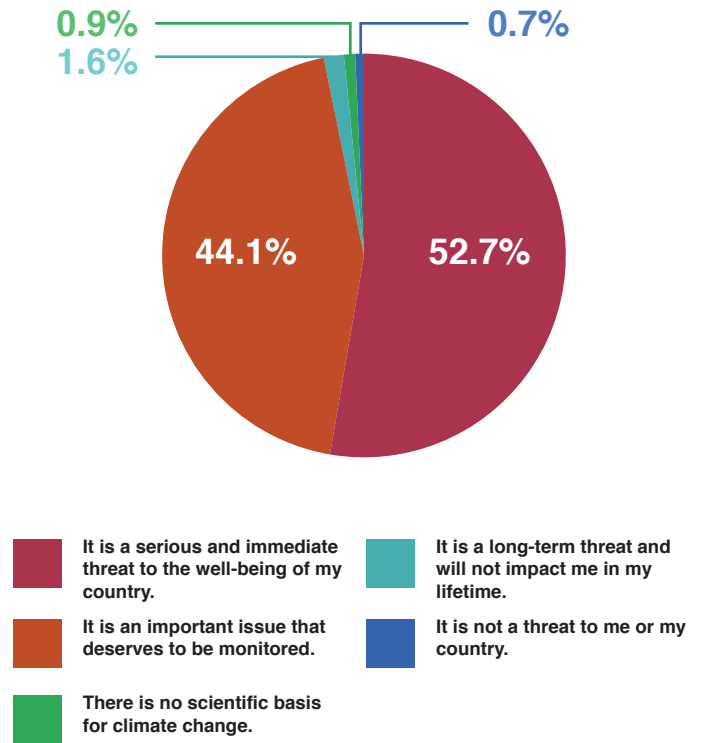
(check 3 responses)

Country	ASEAN is becoming increasingly disunited.		ASEAN is "elitist" and disconnected from the people.		ASEAN's tangible benefits are not felt by the people.		ASEAN is unable to cope with fluid political and economic developments.		ASEAN is becoming an arena of major power competition and its member states may become proxies for the interest of a major power.	
	2019	2020	2019	2020	2019	2020	2019	2020	2019	2020
ASEAN	44.0%	46.5%	35.3%	36.8%	72.6%	74.9%	61.9%	68.6%	62.0%	73.2%
Brunei	33.3%	39.2%	31.1%	33.0%	80.0%	80.4%	64.4%	68.0%	66.7%	79.4%
Cambodia	58.3%	50.0%	25.0%	42.3%	54.2%	50.0%	83.3%	61.5%	79.2%	96.2%
Indonesia	36.5%	32.4%	47.0%	60.1%	74.8%	86.5%	59.1%	62.2%	59.1%	58.8%
Laos	37.9%	47.8%	6.9%	56.5%	75.9%	82.6%	51.7%	43.5%	90.0%	69.6%
Malaysia	39.7%	43.6%	48.6%	37.4%	76.7%	78.5%	59.6%	67.5%	59.6%	73.0%
Myanmar	36.7%	43.9%	18.9%	43.0%	71.0%	73.8%	67.5%	76.7%	62.7%	62.7%
Philippines	34.2%	43.1%	52.3%	27.0%	79.3%	73.0%	63.1%	71.5%	53.2%	85.4%
Singapore	48.4%	54.1%	41.4%	20.3%	68.0%	69.8%	66.4%	72.5%	64.8%	83.3%
Thailand	47.8%	35.4%	33.0%	47.9%	75.7%	84.4%	58.3%	60.4%	53.9%	71.9%
Vietnam	69.4%	70.4%	21.8%	27.6%	63.7%	64.5%	54.8%	65.1%	67.7%	72.4%

Views on climate change

Climate change is a clear and present danger to the global well-being and these sentiments are strongly echoed by the survey respondents. More than half (52.7%) view climate change as a “serious and immediate threat to the well-being” in their respective countries. This concern is most pronounced in Indonesia, the Philippines and Vietnam with the respective shares of 71%, 65%, and 61.2%.

Meanwhile, 44.1% of the respondents consider climate change to be “an important issue that deserves to be monitored”. The majority of respondents from Brunei (71.2%) and Malaysia (50.9%) subscribe to this position, which suggests that they are keenly aware of the negative impact of climate change but remain unconvinced that it has risen to the threatening level in their respective countries. Overall, only 3.2% of the respondents fall loosely into the “climate change denial” camp who either reject the scientific basis of climate change or do not see the problem having any serious impact.

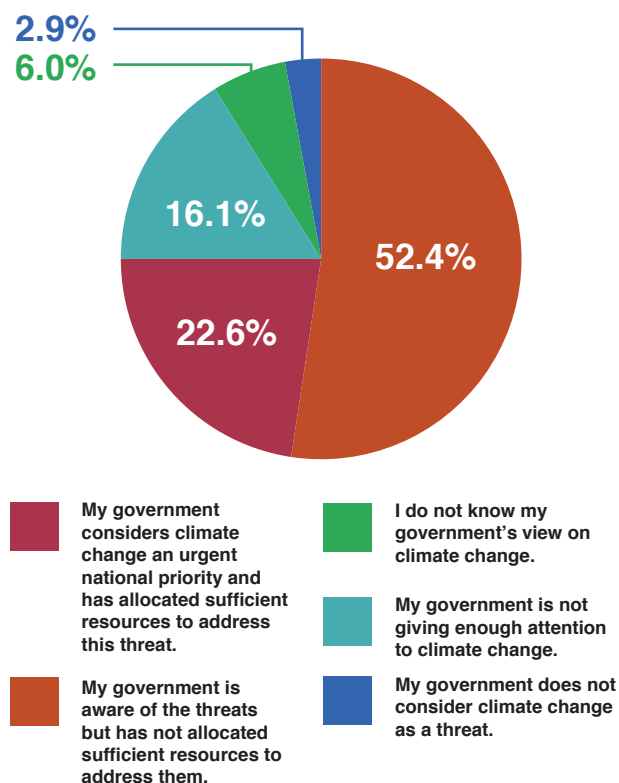


Q6 What is your view of climate change?*

Country	It is a serious and immediate threat to the well-being of my country.	It is an important issue that deserves to be monitored.	There is no scientific basis for climate change.	It is a long-term threat and will not impact me in my lifetime.	It is not a threat to me or my country.
ASEAN	52.7%	44.1%	0.9%	1.6%	0.7%
Brunei	26.8%	71.2%	1.0%	1.0%	0.0%
Cambodia	57.7%	42.3%	0.0%	0.0%	0.0%
Indonesia	71.0%	25.7%	1.3%	0.7%	1.3%
Laos	60.9%	26.1%	4.3%	0.0%	8.7%
Malaysia	45.4%	50.9%	0.6%	3.1%	0.0%
Myanmar	45.5%	47.1%	2.9%	2.9%	1.6%
Philippines	65.0%	33.6%	0.0%	1.4%	0.0%
Singapore	49.6%	48.6%	0.0%	1.8%	0.0%
Thailand	54.2%	44.8%	0.0%	0.0%	1.0%
Vietnam	61.2%	38.2%	0.0%	0.6%	0.0%

Government's efforts in addressing climate change challenges

The majority of respondents consider climate change a threat to their well-being, but are not convinced that their respective governments have done enough to address this issue. Only less than a quarter of the respondents (22.6%) think that their “government considers climate change an urgent national priority and has allocated sufficient resources to address this threat.” Singapore bucks this trend with 60.4% agreeing that their government has backed up its policy pronouncements with sufficient resources. The situation is less rosy across the other nine ASEAN member states. Overall, the majority of respondents (52.4%) agreed that their respective “government is aware of the threats but has not allocated sufficient resources to address them.” The problem is more acutely felt in Thailand (36.5%), Myanmar (29.9%), Indonesia (24.3%), Cambodia (23.1%), and Malaysia (22.7%) where at least one in five respondents think that their government either is not “giving enough attention to climate change” or “does not consider climate change as a threat”.



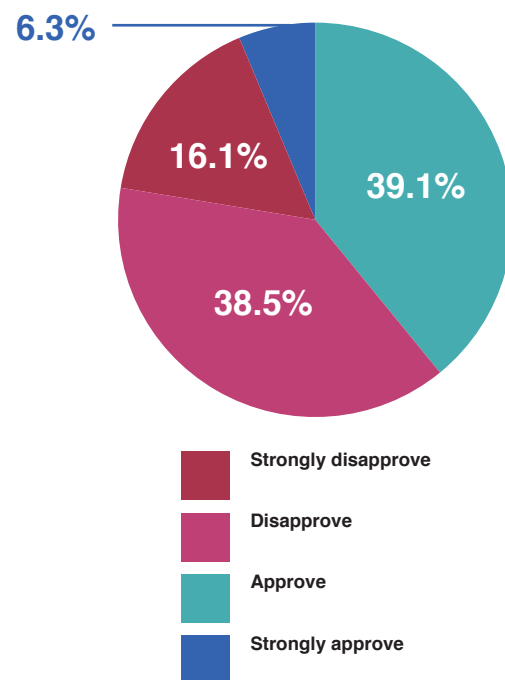
Q7 How do you assess your government's efforts in addressing climate change?*

Country	My government considers climate change an urgent national priority and has allocated sufficient resources to address this threat.	My government is aware of the threats but has not allocated sufficient resources to address them.	I do not know my government's view on climate change.	My government is not giving enough attention to climate change.	My government does not consider climate change as a threat.
ASEAN	22.6%	52.4%	6.0%	16.1%	2.9%
Brunei	17.5%	52.6%	16.5%	12.4%	1.0%
Cambodia	11.5%	53.9%	11.5%	19.2%	3.9%
Indonesia	8.8%	62.2%	4.7%	21.6%	2.7%
Laos	17.3%	56.5%	17.4%	4.4%	4.4%
Malaysia	14.1%	57.7%	5.5%	19.6%	3.1%
Myanmar	12.3%	48.0%	9.8%	24.6%	5.3%
Philippines	23.4%	60.6%	2.9%	11.7%	1.4%
Singapore	60.4%	32.9%	0.9%	4.9%	0.9%
Thailand	6.2%	50.0%	7.3%	29.2%	7.3%
Vietnam	22.4%	65.8%	2.0%	8.5%	1.3%

Assessment of ASEAN's response to the Rakhine crisis

The Rakhine issue is a sensitive – and divisive – topic within ASEAN as its member states are torn between honouring the principle of non-interference and keeping ASEAN credible as a regional organisation in the eyes of Southeast Asians and the international community. The results of the survey indicate that the region remains split almost down the middle as 54.6% of the respondents either “strongly disapprove” or “disapprove” while 45.4% “approve” or “strongly approve” the way ASEAN is dealing with the Rakhine issue. The biggest dissatisfaction comes from Malaysia (71.2%), Singapore (68.5%), and the Philippines (64.3%). On the other side of the spectrum, the strongest support for ASEAN’s response is found amongst Lao (73.9%), Vietnamese (65.8%), and Myanmar (58.2%) respondents.

Opinions among the Indonesian respondents are almost evenly split, with 51.3% being dissatisfied with ASEAN’s handling of the issue and 48.7% giving their approval. In Brunei – a predominantly Muslim society – 59.8% of the respondents register their dissatisfaction with ASEAN’s response.

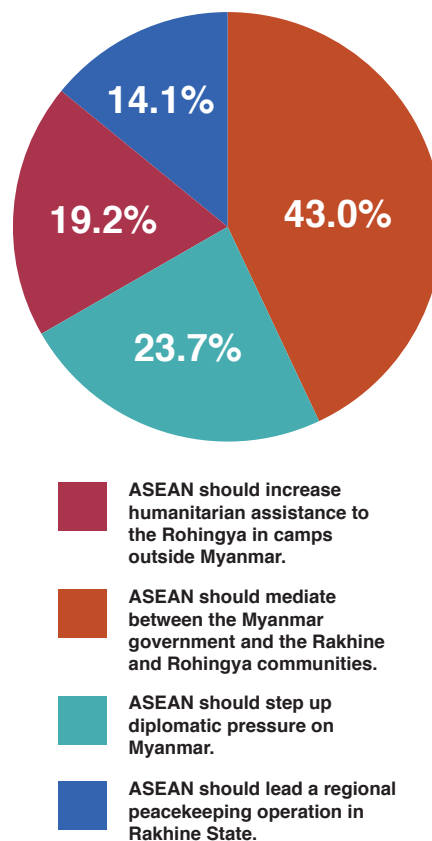


Q8 What is your assessment of ASEAN’s response to the crisis in Myanmar’s Rakhine State?*

Country	Strongly disapprove	Disapprove	Approve	Strongly approve
ASEAN	16.1%	38.5%	39.1%	6.3%
Brunei	16.5%	43.3%	34.0%	6.2%
Cambodia	23.1%	34.6%	42.3%	0.0%
Indonesia	16.2%	35.1%	37.9%	10.8%
Laos	4.4%	21.7%	65.2%	8.7%
Malaysia	27.0%	44.2%	23.3%	5.5%
Myanmar	13.9%	27.9%	43.9%	14.3%
Philippines	18.3%	46.0%	32.8%	2.9%
Singapore	15.8%	52.7%	29.7%	1.8%
Thailand	15.6%	35.4%	44.8%	4.2%
Vietnam	6.6%	27.6%	64.5%	1.3%

Proposals to mitigate the Rakhine State crisis

The majority of respondents in seven ASEAN member states (except Myanmar, Vietnam, and Laos) do not approve of ASEAN’s response to the Rakhine crisis. Within this group of respondents who disapprove of ASEAN’s responses thus far, 43% argue that “ASEAN should mediate between the Myanmar government and the Rakhine and Rohingya communities.” This position is the top policy prescription in all ASEAN member states except Indonesia. The most popular option for the Indonesian respondents (35.5%) in this group is for ASEAN to “step up diplomatic pressure on Myanmar”. It is also the second most popular option (23.7%) across this group. Meanwhile, 19.2% choose “increasing humanitarian assistance to the Rohingya in camps outside Myanmar”, and 14.1% suggest that ASEAN establish a peacekeeping operation in Rakhine State.



Q9 What should ASEAN do better to address the Rakhine crisis?*

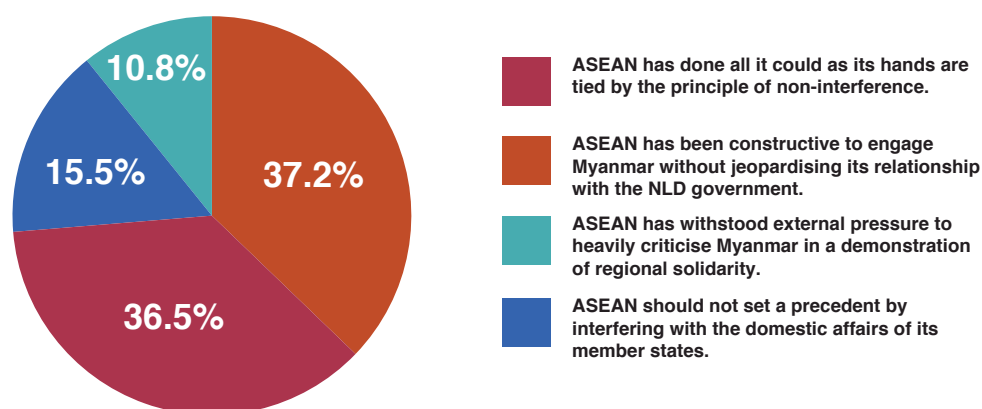
Answered: 714 (Respondents who chose the "Disapprove" and "Strongly disapprove" options in Q8)

Country	ASEAN should increase humanitarian assistance to the Rohingya in camps outside Myanmar.	ASEAN should mediate between the Myanmar government and the Rakhine and Rohingya communities.	ASEAN should step up diplomatic pressure on Myanmar.	ASEAN should lead a regional peacekeeping operation in Rakhine State.
ASEAN	19.2%	43.0%	23.7%	14.1%
Brunei	22.4%	41.4%	19.0%	17.2%
Cambodia	13.3%	53.3%	26.7%	6.7%
Indonesia	15.8%	34.2%	35.5%	14.5%
Laos	33.3%	50.0%	16.7%	0.0%
Malaysia	11.2%	38.8%	31.0%	19.0%
Myanmar	31.4%	43.1%	4.9%	20.6%
Philippines	21.6%	38.6%	25.0%	14.8%
Singapore	17.8%	43.4%	27.6%	11.2%
Thailand	20.4%	46.9%	24.5%	8.2%
Vietnam	13.5%	65.4%	17.3%	3.8%

Rationale for supporting ASEAN's response to the Rakhine crisis

Less than half of the respondents (45.4%) agree with ASEAN's response to the Rakhine crisis. 37.2% of the respondents in this group find that "ASEAN has been constructive to engage Myanmar without jeopardising its relationship with the NLD government", and 36.5% agree that "ASEAN has done all it could as its hands are tied by the principle of non-interference". Meanwhile, 15.5% show their support out of the concern that "ASEAN should not

set a precedent by interfering with the domestic affairs of its member states", and 10.8% commend ASEAN for standing up to external pressure to preserve regional solidarity. In summary, the principle of non-interference – directly or indirectly – has a bearing on at least 52% of the respondents in this group as they support ASEAN's response to the Rakhine crisis.



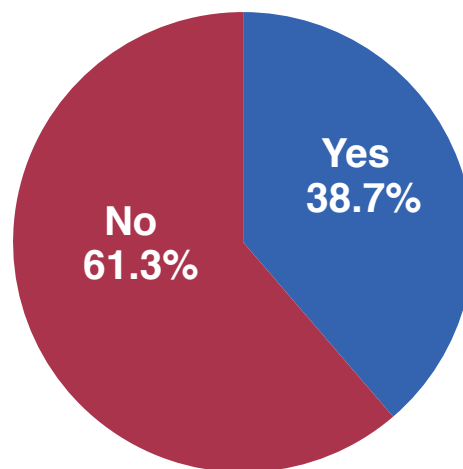
Q10 Why do you approve of ASEAN's response to the Rakhine crisis?*

Answered: 594 (Respondents who chose the "Approve" and "Strongly approve" options in Q8)

Country	ASEAN has done all it could as its hands are tied by the principle of non-interference.	ASEAN has been constructive to engage Myanmar without jeopardising its relationship with the NLD government.	ASEAN has withstood external pressure to heavily criticise Myanmar in a demonstration of regional solidarity.	ASEAN should not set a precedent by interfering with the domestic affairs of its member states.
ASEAN	36.5%	37.2%	10.8%	15.5%
Brunei	35.9%	43.5%	10.3%	10.3%
Cambodia	54.5%	27.3%	0.0%	18.2%
Indonesia	36.1%	48.6%	9.7%	5.6%
Laos	41.2%	23.5%	11.8%	23.5%
Malaysia	34.1%	40.4%	14.9%	10.6%
Myanmar	33.8%	24.0%	21.1%	21.1%
Philippines	28.6%	53.1%	6.1%	12.2%
Singapore	34.3%	40.0%	2.8%	22.9%
Thailand	34.0%	40.4%	6.4%	19.2%
Vietnam	46.0%	36.0%	6.0%	12.0%

Willingness to accept the resettlement of the Rohingya people

The majority of respondents (61.3%) do not favour the resettling of the displaced Rohingya people in their respective countries. It is alarming that 66% of the Myanmar respondents indicate their unwillingness to resettle the Rohingya people in their country, a proposition that – if shared by the country’s leadership and public – would surely put paid to efforts towards an amicable solution to the crisis. Significant opposition to resettling the Rohingya in their respective countries is found in Laos (82.6%) and Cambodia (80.8%). Even in Brunei and Malaysia, which are predominantly Muslim societies, 68% and 56.4% say ‘No’ to the Rohingya’s resettlement in their respective countries. Only in the Philippines and Indonesia are the Rohingya more welcome with 61.3% and 56.1% respectively saying ‘Yes’.



Q11 Do you support the resettlement of the displaced Rohingya people in your country?*

Country	No	Yes
ASEAN	61.3%	38.7%
Brunei	68.0%	32.0%
Cambodia	80.8%	19.2%
Indonesia	43.9%	56.1%
Laos	82.6%	17.4%
Malaysia	56.4%	43.6%
Myanmar	66.0%	34.0%
Philippines	38.7%	61.3%
Singapore	68.5%	31.5%
Thailand	61.5%	38.5%
Vietnam	75.0%	25.0%

This section seeks views on the influence of the major powers in the region as well as their leadership credibility in championing free trade, maintaining the rules-based order and upholding international law.

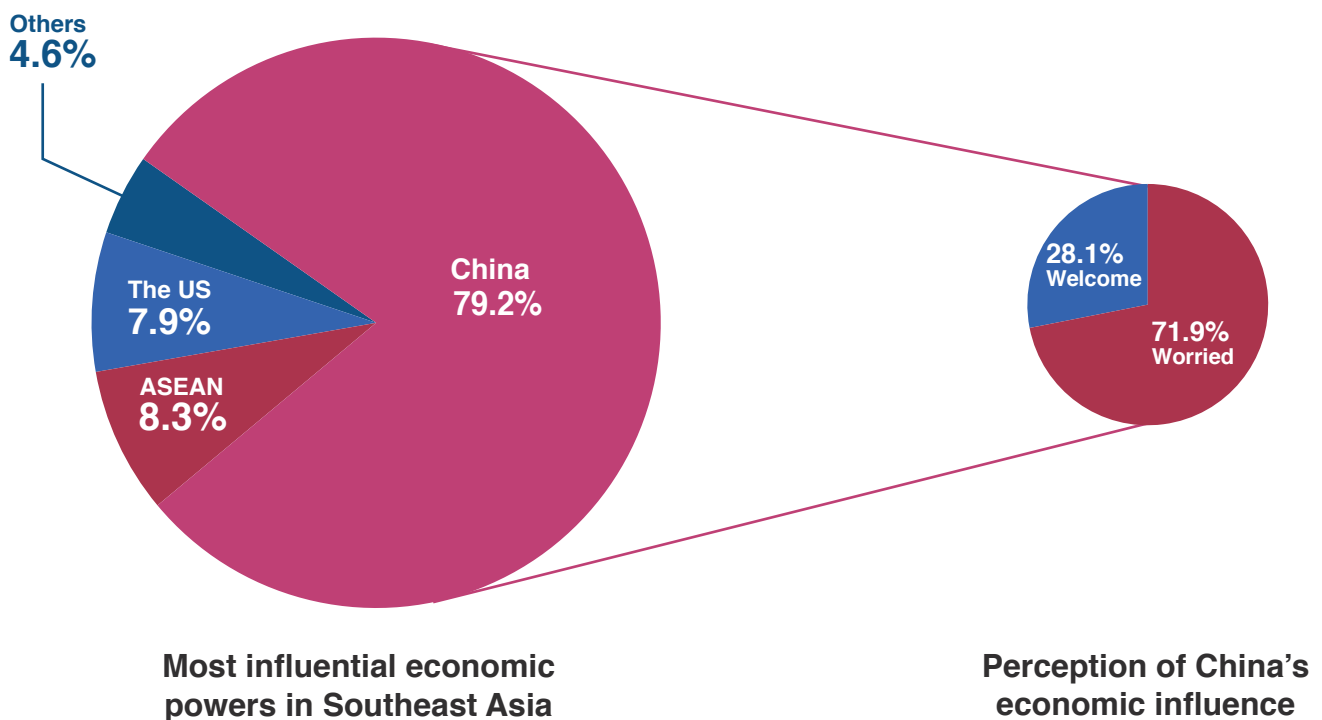
Most influential economic power in Southeast Asia

China continues to solidify its economic stranglehold on the region. The share of respondents who pick China as the most influential economic power in the region has increased from 73.3% in 2019 to 79.2% in 2020. The highest levels of recognition of China's economic influence are recorded by respondents from Cambodia (88.5%), Thailand (86.5%) and Brunei (85.5%). ASEAN (8.3%) and the US (7.9%) round up the top three ranking.

China's economic influence is deeply felt but not very well-received in the region. Among those who see China as the most influential economic power, 71.9% are

“worried about its growing regional economic influence”. The biggest concern is found in the Philippines (82.1%), Vietnam (80.2%), and Thailand (75.9%). The PCW cohort (63.8%) has a higher degree of concern over China's economic influence than the CW cohort (58.9%).

Conversely, although only a handful of respondents (7.9%) choose the US as the most influential economic power in the region, American economic power does not elicit the negative response like China. In fact, 70.2% of this small group welcome the US' regional economic influence.



Survey Report

Q12 In your view, which country/regional organisation is the most influential economic power in Southeast Asia?

Country	ASEAN		China		The European Union		India		Japan		Russia		The United States	
	2019	2020	2019	2020	2019	2020	2019	2020	2019	2020	2019	2020	2019	2020
ASEAN	10.7%	8.3%	73.3%	79.2%	1.7%	0.6%	0.1%	0.1%	6.2%	3.9%	0.1%	0.0%	7.9%	7.9%
Brunei	6.7%	9.3%	80.0%	85.5%	0.0%	1.0%	0.0%	0.0%	11.1%	2.1%	0.0%	0.0%	2.2%	2.1%
Cambodia	8.3%	7.7%	83.4%	88.5%	8.3%	3.8%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Indonesia	10.4%	10.8%	81.7%	77.0%	0.0%	0.0%	0.0%	0.0%	4.4%	4.8%	0.0%	0.0%	3.5%	7.4%
Laos	13.8%	17.4%	82.8%	78.3%	3.4%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	4.3%
Malaysia	10.4%	11.7%	78.4%	78.5%	0.0%	0.6%	0.0%	0.0%	5.6%	2.5%	0.0%	0.0%	5.6%	6.7%
Myanmar	8.8%	4.9%	73.1%	84.9%	1.7%	0.8%	0.0%	0.0%	9.4%	5.3%	0.0%	0.0%	7.0%	4.1%
Philippines	14.4%	13.1%	61.3%	61.3%	4.5%	0.0%	0.9%	0.7%	6.3%	8.8%	0.9%	0.0%	11.7%	16.1%
Singapore	9.5%	5.0%	69.8%	81.1%	3.2%	0.4%	0.0%	0.0%	2.4%	2.7%	0.0%	0.0%	15.1%	10.8%
Thailand	16.8%	4.2%	72.6%	86.5%	0.9%	1.0%	0.0%	0.0%	7.1%	3.1%	0.0%	0.0%	2.6%	5.2%
Vietnam	7.4%	8.6%	68.0%	76.3%	0.8%	0.7%	0.0%	0.0%	8.2%	2.6%	0.0%	0.0%	15.6%	11.8%

Q13 What is your view of this economic power's influence on your country?*

Answered: 108 (Respondents who chose the "ASEAN" option in Q12), 1,036 (Respondents who chose the "China" option in Q12), 104 (Respondents who chose the "The US" option in Q12)

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.
ASEAN	15.7%	84.3%	71.9%	28.1%	29.8%	70.2%
Brunei	11.1%	88.9%	62.7%	37.3%	50.0%	50.0%
Cambodia	50.0%	50.0%	56.5%	43.5%	0.0%	0.0%
Indonesia	0.0%	100.0%	61.4%	38.6%	36.4%	63.6%
Laos	75.0%	25.0%	66.7%	33.3%	100.0%	0.0%
Malaysia	5.3%	94.7%	67.2%	32.8%	27.3%	72.7%
Myanmar	41.7%	58.3%	73.9%	26.1%	30.0%	70.0%
Philippines	16.7%	83.3%	82.1%	17.9%	36.4%	63.6%
Singapore	0.0%	100.0%	74.4%	25.6%	20.8%	79.2%
Thailand	0.0%	100.0%	75.9%	24.1%	40.0%	60.0%
Vietnam	23.1%	76.9%	80.2%	19.8%	22.2%	77.8%

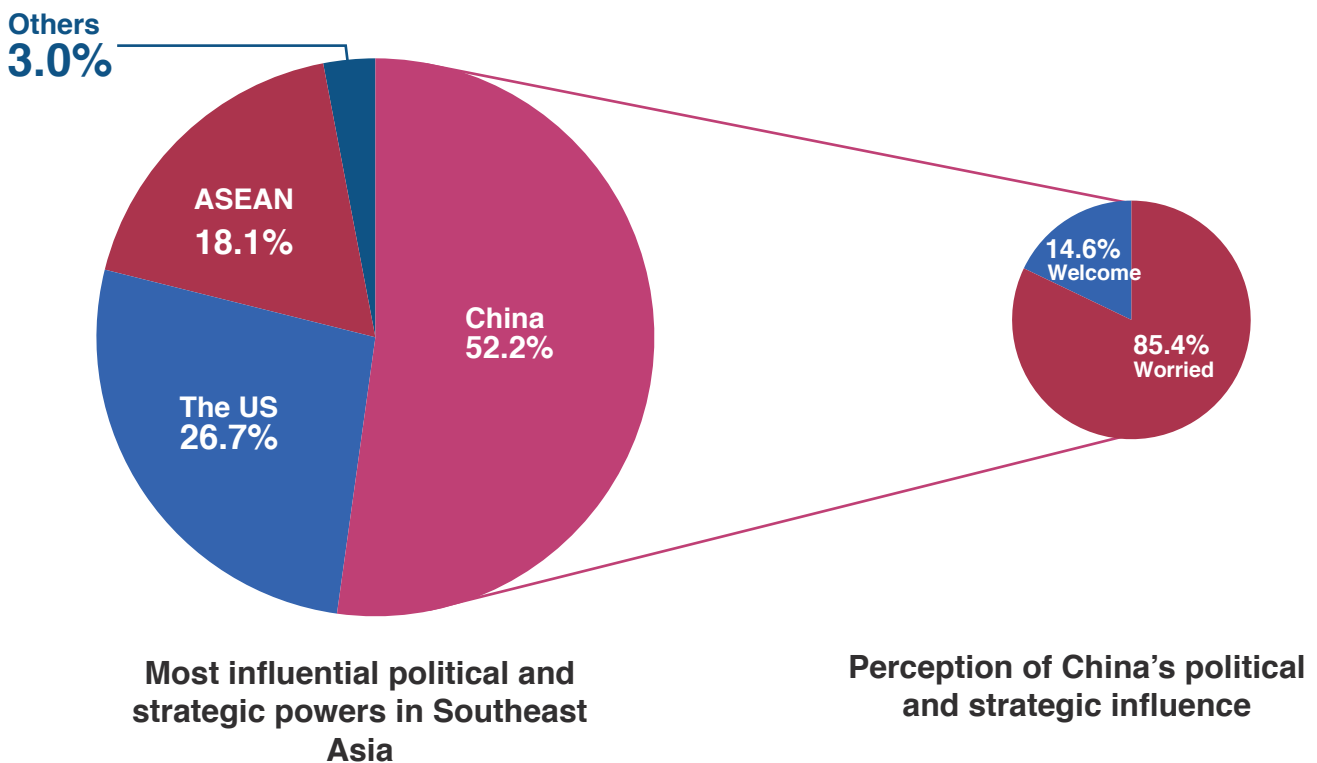
Most influential political and strategic power in Southeast Asia

Last year's survey turned on its head the conventional wisdom that China and the US hold sway over the region in their respective economic and political-strategic spheres. The 2020 survey results confirm that this is not a fluke – more than half of the respondents (52.2%) see China as the most influential power in the political-strategic realm, a considerable increase from 45.2% in 2019.

While China can take gratification from the region's recognition of its growing political and strategic clout, it should do so with some grain of salt. Among those who view China as having the most political-strategic influence in Southeast Asia, 85.4% register their concern over this matter. The younger PCW cohort (63%) are more worried about China's growing political and strategic influence than the more senior CW cohort (58.4%). It bears reminding that recognising China's power is not the same as accepting the new reality. In fact, if not handled with

due diligence, this may elicit counter-balancing forces to prevent China from becoming the region's hegemon.

The US continues to lose political and strategic ground in the region with its share decreasing from 30.5% in 2019 to 26.7% in 2020. Washington's woes are compounded by four additional findings. First, the percentage of respondents who choose China as the most influential political-strategic player almost doubles that of the US (52.2% versus 26.7%). Second, the gap in China's favour between perceived US and Chinese influence has widened from 14.7% in 2019 to 25.5% in 2020. Third, China is seen as the most influential power in nine out of ten ASEAN member states, except the Philippines. Fourth, there is a strong trust deficit towards the US since among the respondents who pick the US as the most influential political and strategic power, only 52.7% welcome Washington in the region.



Q14 In your view, which country/regional organisation has the most political and strategic influence in Southeast Asia?

Country	ASEAN		China		The European Union		India		Japan		Russia		The United States	
	2019	2020	2019	2020	2019	2020	2019	2020	2019	2020	2019	2020	2019	2020
ASEAN	20.8%	18.1%	45.2%	52.2%	0.7%	1.1%	0.1%	0.0%	2.1%	1.8%	0.6%	0.1%	30.5%	26.7%
Brunei	33.3%	32.0%	53.4%	49.5%	0.0%	2.1%	0.0%	0.0%	2.2%	1.0%	0.0%	0.0%	11.1%	15.4%
Cambodia	20.8%	11.5%	50.0%	57.7%	0.0%	3.9%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	29.2%	26.9%
Indonesia	26.1%	23.0%	40.9%	40.6%	0.0%	2.0%	0.0%	0.0%	0.0%	2.0%	0.0%	0.0%	33.0%	32.4%
Laos	27.6%	17.4%	41.4%	65.2%	0.0%	0.0%	0.0%	0.0%	3.4%	13.0%	6.9%	4.4%	20.7%	0.0%
Malaysia	23.6%	17.8%	43.7%	54.6%	0.0%	0.6%	0.0%	0.0%	2.8%	1.2%	0.0%	0.0%	29.9%	25.8%
Myanmar	20.6%	15.2%	47.7%	63.5%	2.3%	2.5%	0.6%	0.0%	5.3%	1.6%	1.2%	0.4%	22.3%	16.8%
Philippines	20.9%	22.6%	40.9%	35.8%	0.0%	0.0%	0.0%	0.0%	1.8%	3.6%	0.0%	0.0%	36.4%	38.0%
Singapore	17.0%	14.4%	41.1%	51.8%	0.8%	0.0%	0.0%	0.0%	0.0%	0.9%	0.0%	0.0%	41.1%	32.9%
Thailand	15.9%	15.7%	46.0%	53.1%	1.8%	1.0%	0.0%	0.0%	1.8%	1.0%	0.9%	0.0%	33.6%	29.2%
Vietnam	14.9%	13.8%	52.1%	56.6%	0.0%	0.0%	0.0%	0.0%	1.6%	1.3%	0.8%	0.0%	30.6%	28.3%

Q15 What is your view of this power's political and strategic influence on your country?*

Answered: 237 (Respondents who chose the "ASEAN" option in Q14), 683 (Respondents who chose the "China" option in Q14), 349 (Respondents who chose the "The US" option in Q14)

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.
ASEAN	16.0%	84.0%	85.4%	14.6%	47.3%	52.7%
Brunei	9.7%	90.3%	77.1%	22.9%	53.3%	46.7%
Cambodia	66.7%	33.3%	73.3%	26.7%	57.1%	42.9%
Indonesia	14.7%	85.3%	73.3%	26.7%	70.8%	29.2%
Laos	50.0%	50.0%	86.7%	13.3%	0.0%	0.0%
Malaysia	6.9%	93.1%	80.9%	19.1%	59.5%	40.5%
Myanmar	24.3%	75.7%	83.9%	16.1%	61.0%	39.0%
Philippines	19.4%	80.6%	87.8%	12.2%	38.5%	61.5%
Singapore	9.4%	90.6%	92.2%	7.8%	26.0%	74.0%
Thailand	13.3%	86.7%	88.2%	11.8%	71.4%	28.6%
Vietnam	19.1%	80.9%	95.3%	4.7%	23.3%	76.7%

Leadership in championing free trade

Multilateral free trade has been under stress in the last two years. The majority of respondents look to Japan (27.6%) and the EU (25.5%) for leadership on free trade. The US (14.5%) – which used to be at the forefront of global free trade – drops fourth in the pecking order, slightly behind China (14.7%). Japan comes as the first choice in four

ASEAN member states – Myanmar (37.7%), Laos (34.8%), the Philippines (33.6%), and Brunei (29.9%). Meanwhile, the EU is seen as the champion for free trade in Cambodia (42.3%), Thailand (34.4%), Malaysia (31.3%), Indonesia (29%), Singapore (28.4%), and Vietnam (26.3%).



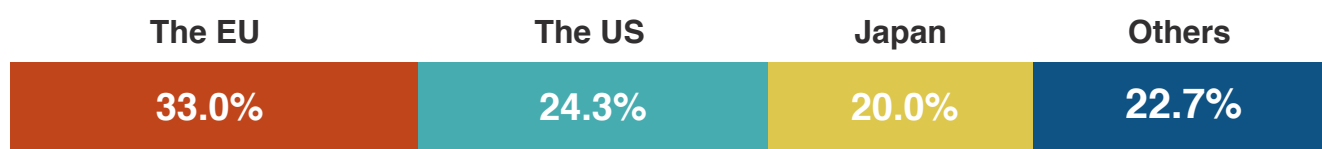
Q16 In which country/regional organisation do you have the strongest confidence to provide leadership in championing the global free trade agenda?*

Country	Australia	China	The European Union	India	Japan	New Zealand	Republic of Korea	The United States	Russia
ASEAN	6.7%	14.7%	25.5%	1.5%	27.6%	5.8%	2.7%	14.5%	1.0%
Brunei	14.4%	14.4%	18.6%	2.1%	29.9%	11.3%	2.1%	6.2%	1.0%
Cambodia	7.7%	19.2%	42.3%	0.0%	19.3%	0.0%	0.0%	11.5%	0.0%
Indonesia	2.7%	18.9%	29.0%	2.0%	21.6%	6.1%	6.8%	12.2%	0.7%
Laos	4.4%	34.8%	21.6%	0.0%	34.8%	0.0%	0.0%	0.0%	4.4%
Malaysia	6.8%	18.4%	31.3%	1.2%	22.1%	10.4%	1.2%	8.6%	0.0%
Myanmar	3.7%	18.9%	17.6%	4.1%	37.7%	2.0%	3.3%	10.7%	2.0%
Philippines	11.0%	2.9%	19.7%	0.7%	33.6%	2.2%	3.6%	24.1%	2.2%
Singapore	7.6%	14.4%	28.4%	0.0%	23.9%	11.3%	0.9%	13.1%	0.4%
Thailand	8.3%	16.7%	34.4%	0.0%	24.0%	3.1%	3.1%	10.4%	0.0%
Vietnam	4.0%	5.9%	26.3%	1.3%	24.3%	2.0%	2.0%	33.5%	0.7%

Leadership in maintaining the rules-based order and upholding international law

The EU's strong credentials in upholding international law stand it in good stead as one in three (33%) respondents put their highest confidence in the EU to maintain the rules-based order and uphold international law. Respondents from six ASEAN member states – Thailand (51.0%), Indonesia (47.3%), Cambodia (38.5%), Malaysia (38.1%),

Singapore (36.5%), and Brunei (28.9%) – pick the EU as their top choice. The US (24.3%) and Japan (20%) are the region's second and third choice respectively. Support for US leadership in this area is strongly felt in Vietnam (45.4%) and the Philippines (35.1%), while Japan enjoys the highest confidence in Laos (34.8%) and Myanmar (33.2%).



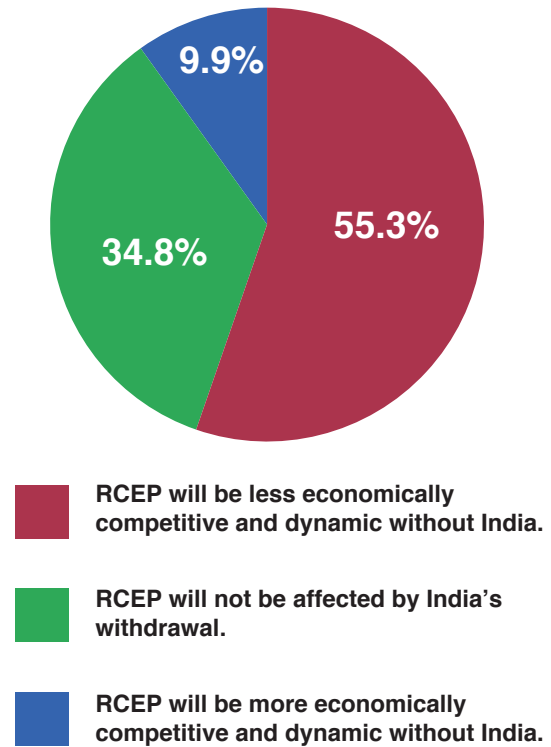
Q17 In which country/regional organisation do you have the strongest confidence to provide leadership to maintain the rules-based order and uphold international law?*

Country	Australia	China	The European Union	India	Japan	New Zealand	Republic of Korea	The United States	Russia
ASEAN	5.7%	5.5%	33.0%	1.4%	20.0%	6.7%	0.9%	24.3%	2.5%
Brunei	8.2%	5.1%	28.9%	0.0%	22.7%	12.4%	2.1%	18.5%	2.1%
Cambodia	3.8%	0.0%	38.5%	0.0%	26.9%	0.0%	0.0%	30.8%	0.0%
Indonesia	3.4%	4.7%	47.3%	0.7%	19.6%	6.1%	1.3%	16.2%	0.7%
Laos	0.0%	26.1%	17.4%	0.0%	34.8%	8.7%	0.0%	13.0%	0.0%
Malaysia	6.8%	3.1%	38.1%	1.2%	19.0%	11.0%	0.6%	18.4%	1.8%
Myanmar	4.9%	8.6%	17.6%	3.7%	33.2%	4.5%	0.8%	19.3%	7.4%
Philippines	11.0%	0.7%	31.4%	0.7%	15.3%	2.9%	0.7%	35.1%	2.2%
Singapore	6.3%	6.3%	36.5%	0.4%	14.0%	10.4%	0.4%	25.7%	0.0%
Thailand	4.2%	6.3%	51.0%	0.0%	16.7%	3.1%	3.1%	14.6%	1.0%
Vietnam	2.6%	4.6%	27.0%	2.6%	10.5%	4.0%	0.0%	45.4%	3.3%

This section seeks views on the broader regional economic integration, including the future of RCEP without India and the impact of the US-China trade war on ASEAN member economies.

Impact of India's withdrawal from RCEP

India's decision to withdraw from the Regional Comprehensive Economic Partnership (RCEP) negotiations during the November 2019 RCEP summit in Bangkok sent shock waves beyond the region. It is the second blow to multilateral free trade pacts after US President Donald Trump took the US out of the Trans-Pacific Partnership (TPP) agreement in early 2017. India's absence will be keenly felt throughout the region as 55.3% of the respondents think "RCEP will be less economically competitive and dynamic without India," while only 9.9% expect RCEP to be better off without India's participation. Beyond any doubt, the region feels that regional economic integration will be more productive with India's participation than without. The majority of respondents in the Philippines (65.7%), Vietnam (63.2%), Cambodia (61.5%), Singapore (60.8%), Thailand (58.3%), Myanmar (52.9%), and Malaysia (52.1%) hold this view. However, there are pockets of doubt on India's role in RCEP as more than two in five respondents from Laos (47.8%), Brunei (46.4%) and Indonesia (42.6%) think that "RCEP will not be affected by India's withdrawal".



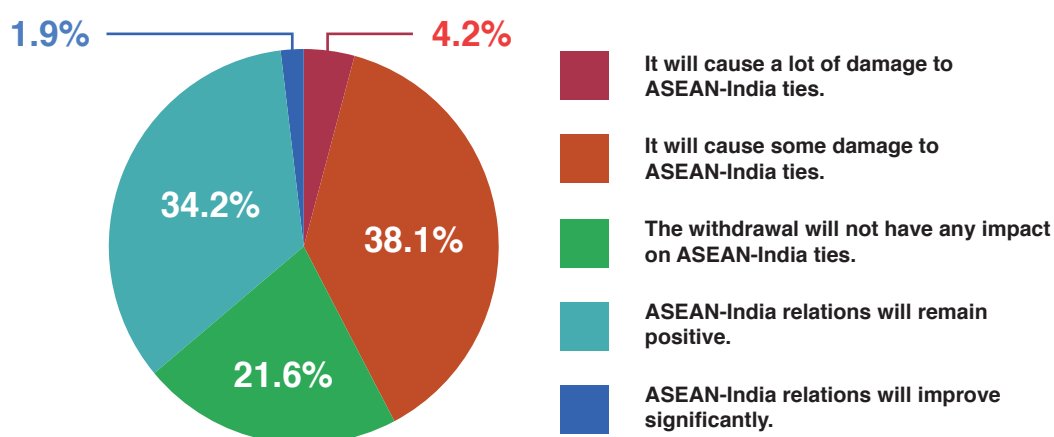
Q18 What is your view on the impact of India's withdrawal from the Regional Comprehensive Economic Partnership (RCEP)?*

Country	RCEP will be less economically competitive and dynamic without India.	RCEP will not be affected by India's withdrawal.	RCEP will be more economically competitive and dynamic without India.
ASEAN	55.3%	34.8%	9.9%
Brunei	40.2%	46.4%	13.4%
Cambodia	61.5%	27.0%	11.5%
Indonesia	47.3%	42.6%	10.1%
Laos	34.8%	47.8%	17.4%
Malaysia	52.1%	35.6%	12.3%
Myanmar	52.9%	38.1%	9.0%
Philippines	65.7%	23.4%	10.9%
Singapore	60.8%	27.0%	12.2%
Thailand	58.3%	36.5%	5.2%
Vietnam	63.2%	33.5%	3.3%

India's withdrawal from RCEP and ASEAN-India relations

India's withdrawal from RCEP may have effects beyond trade and economics. Most respondents (42.3%) are concerned that the withdrawal has caused either "some damage" or "a lot of damage" to ASEAN-India ties. In contrast, 36.1% are more upbeat as they believe that ASEAN-India relations will either remain positive or

might even improve significantly. However, a plurality of respondents across seven ASEAN member states – Cambodia (53.9%), Singapore (53.6%), Laos (47.9%), Vietnam (43.4%), Malaysia (39.3%), Thailand (37.5%), and Indonesia (37.1%) – sit on the pessimistic side.

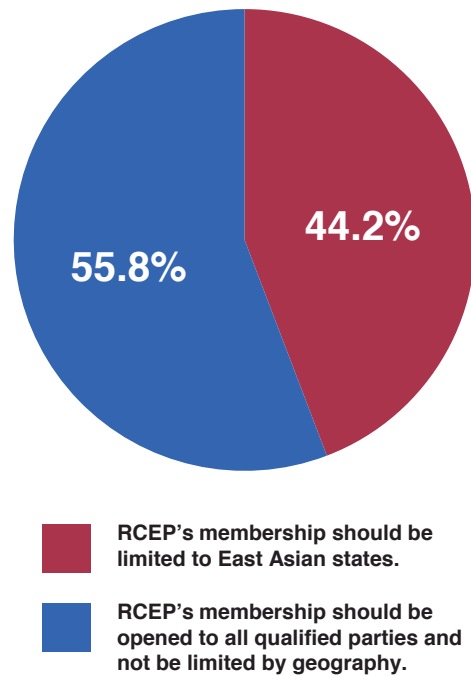


Q19 What is your view on the impact of India's withdrawal from the RCEP negotiations on India's engagement with the region?*

Country	It will cause a lot of damage to ASEAN-India ties.	It will cause some damage to ASEAN-India ties.	The withdrawal will not have any impact on ASEAN-India ties.	ASEAN-India relations will remain positive.	ASEAN-India relations will improve significantly.
ASEAN	4.2%	38.1%	21.6%	34.2%	1.9%
Brunei	2.1%	34.0%	21.6%	40.2%	2.1%
Cambodia	7.7%	46.2%	23.1%	19.2%	3.8%
Indonesia	4.0%	33.1%	27.7%	34.5%	0.7%
Laos	4.4%	43.5%	13.0%	26.1%	13.0%
Malaysia	3.1%	36.2%	24.5%	35.0%	1.2%
Myanmar	5.3%	34.9%	17.2%	38.9%	3.7%
Philippines	4.4%	35.8%	15.3%	43.1%	1.4%
Singapore	4.5%	49.1%	19.4%	26.6%	0.4%
Thailand	1.0%	36.5%	34.4%	27.1%	1.0%
Vietnam	5.9%	37.5%	21.7%	32.9%	2.0%

Future expansion of RCEP

ASEAN has always taken pride in facilitating open and robust multilateral mechanisms. Does this enlightened “openness” include opening the RCEP membership beyond what it defines as “East Asia”? The majority of respondents (55.8%) think that the RCEP membership “should be open to all qualified parties and not be limited by geography”, an encouraging sign for potential suitors including but not limited to the EU and UK. Support for this position is strongest in Laos (69.6%), Singapore (69.4%), Vietnam (67.8%), the Philippines (59.8%), Myanmar (59.4%), and Cambodia (53.8%). However, this position faces opposition in Brunei (62.9%), Malaysia (62%), Thailand (52.1%), and Indonesia (51.4%). Although the overall results may appear promising, such optimism must be tempered as the “opposing camp” is led by some ASEAN heavyweights. The share of support at 55.8% is not sufficiently robust to tackle this potentially contentious issue. Furthermore, the views of the non-ASEAN RCEP members would also weigh in as much as ASEAN’s view.



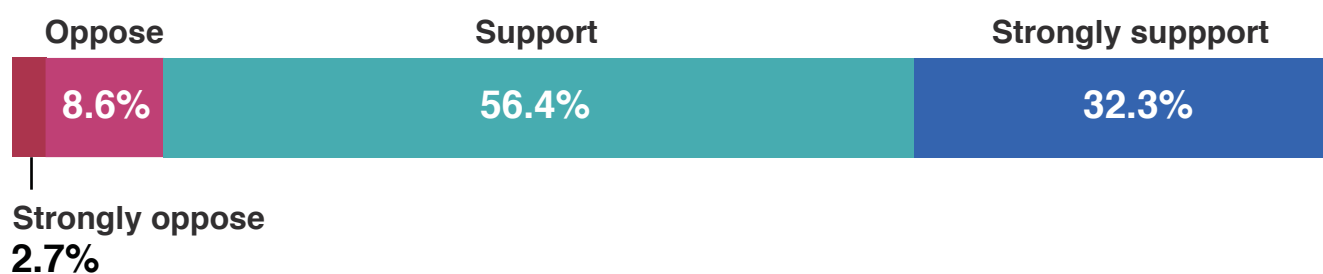
Q20 Should RCEP expand its membership to include non-East Asian entities or states such as the European Union or the United Kingdom?*

Country	RCEP’s membership should be limited to East Asian states.	RCEP’s membership should be opened to all qualified parties and not be limited by geography.
ASEAN	44.2%	55.8%
Brunei	62.9%	37.1%
Cambodia	46.2%	53.8%
Indonesia	51.4%	48.6%
Laos	30.4%	69.6%
Malaysia	62.0%	38.0%
Myanmar	40.6%	59.4%
Philippines	40.2%	59.8%
Singapore	30.6%	69.4%
Thailand	52.1%	47.9%
Vietnam	32.2%	67.8%

Is an ASEAN-EU FTA on the cards?

While the future expansion of RCEP is only partially in ASEAN’s hands, it is the master of its own destiny in the proposed ASEAN-EU FTA. The response to the inter-regional trade pact is a resounding and unequivocal “yes” with 88.7% of the respondents either supporting or strongly supporting the ASEAN-EU FTA negotiations.

Unsurprisingly, the strongest support for the trade pact comes from Singapore (95.9%) and Vietnam (92.8%), two ASEAN member states that have inked bilateral trade deals with the EU. The most vocal opposition is heard from Myanmar (17.6%), Indonesia (14.2%) and Malaysia (14.1%).



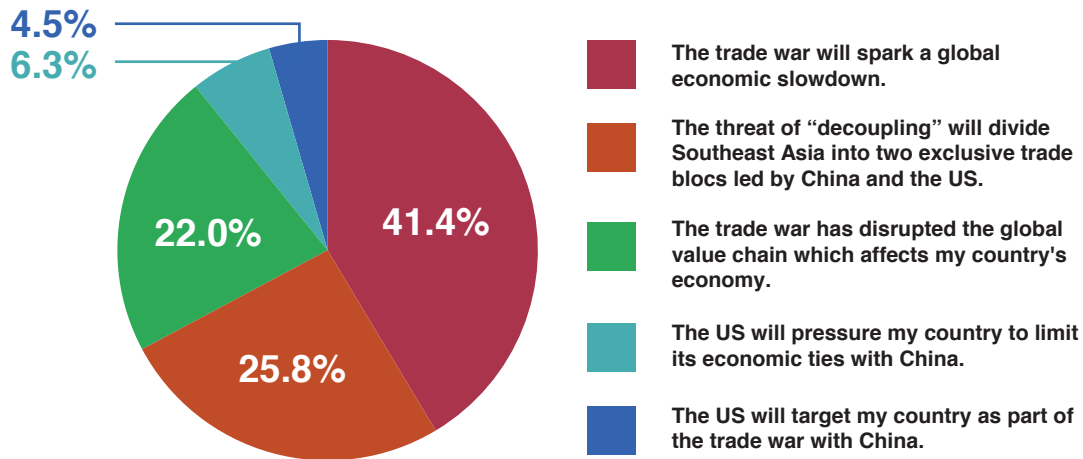
Q21 In the past year, Singapore and Vietnam have concluded free trade agreements (FTA) with the European Union (EU). Do you think ASEAN should negotiate a regional FTA with the EU?*

Country	Strongly oppose	Oppose	Support	Strongly support
ASEAN	2.7%	8.6%	56.4%	32.3%
Brunei	1.0%	9.3%	60.8%	28.9%
Cambodia	0.0%	7.7%	38.5%	53.8%
Indonesia	4.1%	10.1%	55.4%	30.4%
Laos	4.3%	8.7%	52.2%	34.8%
Malaysia	1.2%	12.9%	57.1%	28.8%
Myanmar	4.1%	13.5%	52.9%	29.5%
Philippines	3.7%	6.6%	62.0%	27.7%
Singapore	0.9%	3.2%	55.8%	40.1%
Thailand	4.2%	7.3%	55.2%	33.3%
Vietnam	2.6%	4.6%	59.9%	32.9%

Overview of the US-China trade war

The US-China trade war has affected trade flows in Southeast Asia. The region's top concerns over the impact of the trade war are: (a) the advent of a global economic downturn (41.4%), (b) the threat of "decoupling" that will divide Southeast Asia into two exclusive trade blocs led by China and the US (25.8%), and (c) disruption of the global value chain (22.0%). Concerns over the possibility

of a global economic downturn is the top response in eight ASEAN member states: Laos (65.2%), Myanmar (51.2%), Cambodia (50%), Malaysia (41.7%), Vietnam (40.8%), Thailand (39.6%), the Philippines (38.7%), and Indonesia (37.8%). Meanwhile, most respondents in Brunei (40.2%) and Singapore (36.9%) view the threat of "decoupling" as a bigger concern.



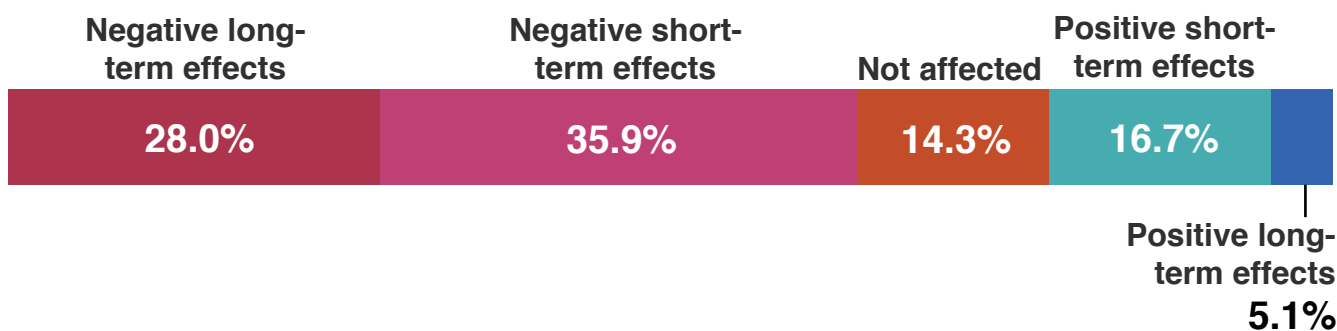
Q22 What is your main concern on the US-China trade war?*

Country	The trade war will spark a global economic slowdown.	The threat of "decoupling" will divide Southeast Asia into two exclusive trade blocs led by China and the US.	The trade war has disrupted the global value chain which affects my country's economy.	The US will pressure my country to limit its economic ties with China.	The US will target my country as part of the trade war with China.
ASEAN	41.4%	25.8%	22.0%	6.3%	4.5%
Brunei	38.1%	40.2%	8.3%	9.3%	4.1%
Cambodia	50.0%	23.1%	11.5%	15.4%	0.0%
Indonesia	37.8%	27.7%	30.4%	2.7%	1.4%
Laos	65.2%	26.1%	8.7%	0.0%	0.0%
Malaysia	41.7%	27.0%	22.1%	5.5%	3.7%
Myanmar	51.2%	13.1%	20.5%	7.0%	8.2%
Philippines	38.7%	24.8%	26.3%	7.3%	2.9%
Singapore	33.8%	36.9%	19.4%	6.8%	3.1%
Thailand	39.6%	14.6%	36.5%	8.3%	1.0%
Vietnam	40.8%	25.7%	19.7%	3.9%	9.9%

Impact of the US-China trade war on the region's economy

The perceived opportunity for regional economies to leverage trade and investment diversions from China has been one of the major talking points on the US-China trade war. This optimism should be taken with a pinch of salt as 63.9% of the respondents believe that their country has been negatively impacted by the trade war. More specifically, 35.9% think the trade war's negative impact on their country will be short-term, while 28% expect it to endure in the long-term. The sense of concern is widely felt across eight ASEAN economies: Singapore (93.7%), Thailand (80.2%), Indonesia (73%), Malaysia (65%), Myanmar (60.3%), Cambodia (61.6%), the Philippines (59.9%), and Laos (43.5%).

The trade war is viewed differently elsewhere in the region. The majority of Vietnamese respondents (55.3%) see the positive impact of the trade war on their country. However, 45.4% think that the benefits will be short-term, and only 9.9% expect the good times for Vietnam to continue to roll. Brunei is the other outlier as the majority of respondents (65%) think that their country has not been affected by the trade war.



Q23 How do you think your country's economy has been affected by the US-China trade war?*

Country	It has been negatively affected, and the negative effects will be long-term.	It has been negatively affected, but the negative effects will be short-term.	It has not been affected.	It has been positively affected, but the benefits will be short-term.	It has been positively affected, and the benefits will be long-term.
ASEAN	28.0%	35.9%	14.3%	16.7%	5.1%
Brunei	11.3%	10.3%	65.0%	9.3%	4.1%
Cambodia	30.8%	30.8%	7.7%	26.9%	3.8%
Indonesia	26.4%	46.6%	14.2%	10.8%	2.0%
Laos	26.1%	17.4%	26.1%	8.7%	21.7%
Malaysia	20.2%	44.8%	8.6%	23.3%	3.1%
Myanmar	24.6%	35.7%	15.6%	14.3%	9.8%
Philippines	27.0%	32.9%	19.0%	17.5%	3.6%
Singapore	47.3%	46.4%	2.7%	2.7%	0.9%
Thailand	38.5%	41.7%	4.2%	12.5%	3.1%
Vietnam	19.7%	20.4%	4.6%	45.4%	9.9%


The politics of 5G

The “battle” to build the region’s 5G internet networks is a keenly watched development as the stakes go beyond securing a lucrative business contract. Given its potential security ramifications, the award of the 5G contract can be seen as a vote of confidence and trust in the developer’s country. Samsung is the developer of choice with 38.5% of the respondents preferring the Korean conglomerate over other competitors. It is also the top choice in Brunei (57.7%), the Philippines (51.8%), Myanmar (45.5%), Indonesia (44%), Vietnam (38.8%), Thailand (31.2%), and Singapore (25.7%). Chinese companies (Datang Telecom, Huawei, ZTE) fare better in Laos

(73.9%), Cambodia (53.9%), and Malaysia (42.3%), where they are the top choice. It is interesting that Chinese telecommunication providers are preferred over their US competitors in all ASEAN member states except the Philippines and Vietnam.

The PCW cohort (41.7%) have a stronger preference for Samsung compared to the CW cohort (35.2%). The levels of support for Chinese telecommunication providers among both cohorts are almost similar (25.7% in the CW cohort vis-à-vis 23.4% in the PCW cohort).

The Region's Preferred 5G Developers

SAMSUNG	Brunei	57.7%	Vietnam	38.8%
	Philippines	51.8%	Thailand	31.2%
	Myanmar	45.5%	Singapore	25.7%
	Indonesia	44.0%		
 HUAWEI	Laos	73.9%		
	Cambodia	53.9%		
	Malaysia	42.3%		

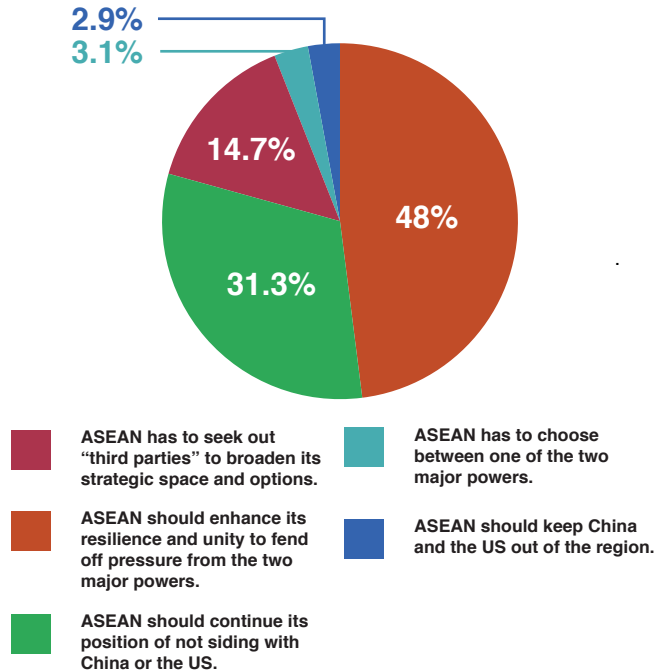
Q24 In which company/companies do you have the highest level of confidence to build your country’s 5G internet infrastructure network?*

Country	Altiostar, Cisco, or Qualcomm (US)	Datang Telecom, Huawei, or ZTE (China)	Ericsson (Sweden)	Nokia (Finland)	Samsung (Korea)
ASEAN	13.4%	24.6%	15.2%	8.3%	38.5%
Brunei	2.1%	32.0%	4.1%	4.1%	57.7%
Cambodia	7.7%	53.9%	11.5%	0.0%	26.9%
Indonesia	10.0%	28.4%	11.5%	6.1%	44.0%
Laos	4.4%	73.9%	0.0%	8.7%	13.0%
Malaysia	4.9%	42.3%	15.4%	9.8%	27.6%
Myanmar	12.7%	27.4%	10.7%	3.7%	45.5%
Philippines	26.3%	2.9%	13.1%	5.9%	51.8%
Singapore	17.1%	19.4%	22.5%	15.3%	25.7%
Thailand	11.5%	27.1%	17.7%	12.5%	31.2%
Vietnam	20.4%	5.2%	25.7%	9.9%	38.8%

This section concerns ASEAN’s options in response to the burgeoning major power competition and the shifting regional security architecture.

Assessing ASEAN's "non-choice"

ASEAN’s strategic conundrum is best summed up by the African proverb – “when elephants fight, it is the grass that suffers.” How does ASEAN stay above the fray or avoid being “trampled”? ASEAN’s default and oft-quoted response of “not taking sides” receives support among 31.3% of the respondents, and is the top option for Laos (47.8%) and Myanmar (32.4%). Nevertheless, the region’s most preferred option is “enhancing ASEAN’s resilience and unity to fend off pressure from the two major powers”, with the share of 48%. It is also the top option in Vietnam (62.5%), Thailand (54.2%), the Philippines (54%), Cambodia (53.9%), Malaysia (50.3%), Singapore (48.6%), Indonesia (48%), Brunei (47.4%), and Myanmar (32.4%). The third highest option chosen by 14.7% of the respondents advocates ASEAN to “seek out third parties to broaden its strategic space and options”.



Q25 ASEAN is caught in the crossfire of the US-China strategic rivalry 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 impartial in the medium and long term is impractical.	ASEAN should keep China and the US out of the region.
ASEAN	14.7%	48.0%	31.3%	3.1%	2.9%
Brunei	12.4%	47.4%	38.2%	1.0%	1.0%
Cambodia	11.5%	53.9%	34.6%	0.0%	0.0%
Indonesia	16.9%	48.0%	31.8%	2.0%	1.3%
Laos	13.0%	30.4%	47.8%	4.4%	4.4%
Malaysia	11.0%	50.3%	35.0%	3.1%	0.6%
Myanmar	20.9%	32.4%	32.4%	6.1%	8.2%
Philippines	13.1%	54.0%	27.8%	2.9%	2.2%
Singapore	17.6%	48.6%	30.2%	2.2%	1.4%
Thailand	6.3%	54.2%	35.4%	1.0%	3.1%
Vietnam	11.2%	62.5%	19.7%	4.0%	2.6%

ASEAN's future: China or the US?

In a hypothetical sense, if ASEAN were to choose between China and the US, who would it opt to align itself with? More than half of the respondents (53.6%) are comfortable leaning towards the US. However, the region's support for China cannot be under-estimated as 46.4% indicate their preference for Beijing. In fact, the country-level data presents a more complex picture. The majority of respondents from seven ASEAN member states choose to align their country with China: Laos (73.9%), Brunei (69.1%), Myanmar (61.5%), Malaysia (60.7%), Cambodia (57.7%), Thailand (52.1%), and Indonesia (52%). In comparison, strong support for alignment with the US is found in Vietnam (85.5%), the Philippines (82.5%) and Singapore (61.3%).



Q26 If ASEAN were forced to align itself with one of the two strategic rivals, which should it choose?*

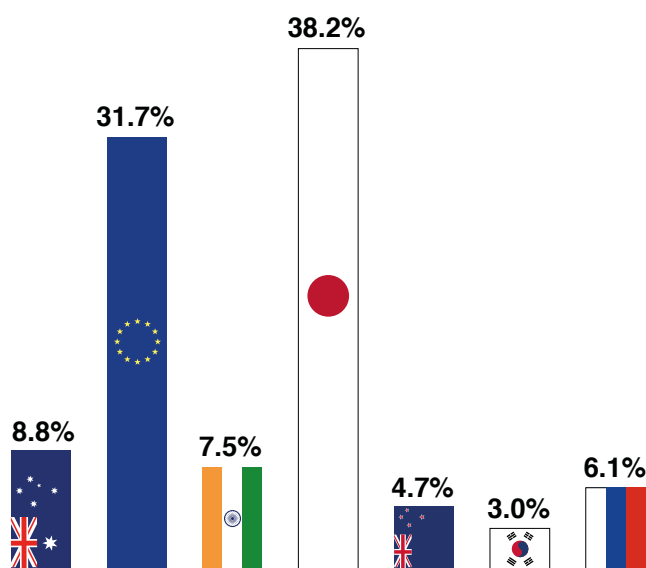
Country	China	The United States
ASEAN	46.4%	53.6%
Brunei	69.1%	30.9%
Cambodia	57.7%	42.3%
Indonesia	52.0%	48.0%
Laos	73.9%	26.1%
Malaysia	60.7%	39.3%
Myanmar	61.5%	38.5%
Philippines	17.5%	82.5%
Singapore	38.7%	61.3%
Thailand	52.1%	47.9%
Vietnam	14.5%	85.5%

Broadening ASEAN's strategic options

ASEAN member states have purportedly hedged against the uncertainties of the US-China rivalry through an opportunistic approach of active engagement with the two major powers. They also seek to expand ASEAN's strategic options beyond the US-China duo. Japan (38.2%), the EU (31.7%) and Australia (8.8%) stand out as the region's most preferred and trusted strategic partners. Japan is the top choice for Myanmar (53.3%), the Philippines (44.5%), Vietnam (40.1%), Indonesia (37.2%), and Brunei (34%). Respondents from Singapore (41.9%), Thailand (40.6%),

Cambodia (38.5%) and Malaysia (36.2%) choose the EU as their most preferred strategic partner. Both the EU and Russia are the top choice for Laos (26.1%).

Japan is the strategic partner of choice among the "younger" respondents with 39.3% amongst the PCW cohort. Trailing after Japan by a noticeable margin is the EU with the share of 29.8% in the same cohort. In the CW cohort, the gap between the top two positions is slightly closer, with 37.1% for Japan and 33.7% for the EU.

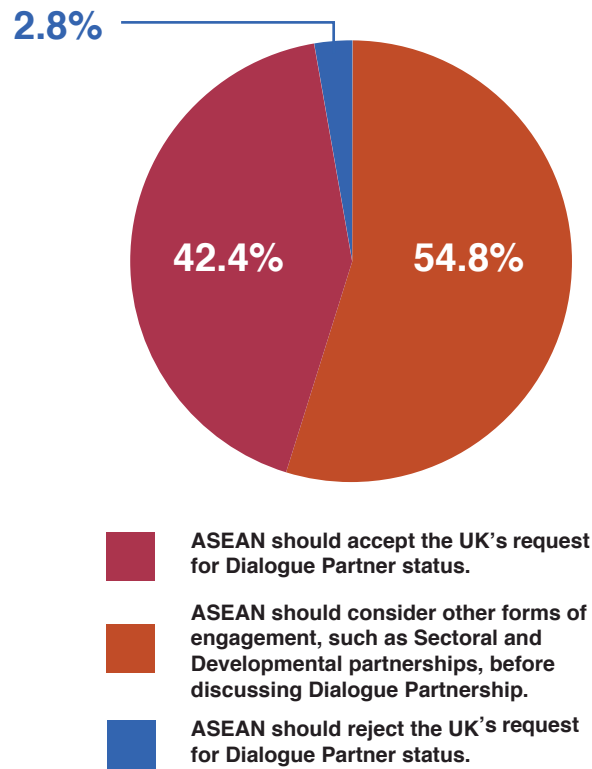


Q27 If ASEAN were to seek out “third parties” to hedge against the uncertainties of the US-China strategic rivalry, who is your most preferred and trusted strategic partner for ASEAN?*

Country	Australia	The European Union	India	Japan	New Zealand	Republic of Korea	Russia
ASEAN	8.8%	31.7%	7.5%	38.2%	4.7%	3.0%	6.1%
Brunei	12.4%	21.6%	2.1%	34.0%	12.4%	10.3%	7.2%
Cambodia	15.4%	38.5%	7.7%	34.6%	0.0%	0.0%	3.8%
Indonesia	6.7%	32.4%	8.8%	37.2%	8.8%	2.7%	3.4%
Laos	4.4%	26.1%	4.4%	21.6%	13.0%	4.4%	26.1%
Malaysia	11.7%	36.2%	8.6%	26.4%	8.0%	1.8%	7.3%
Myanmar	1.6%	19.7%	11.5%	53.3%	1.6%	2.1%	10.2%
Philippines	16.8%	29.2%	0.7%	44.5%	1.5%	2.9%	4.4%
Singapore	9.5%	41.9%	7.2%	32.9%	4.0%	2.7%	1.8%
Thailand	9.4%	40.6%	7.3%	31.2%	3.1%	4.2%	4.2%
Vietnam	7.9%	33.6%	9.2%	40.1%	1.3%	1.3%	6.6%

Responding to Brexit

The UK is on track to finalise its withdrawal from the EU in the near future. In the post-Brexit period, the UK is very likely to seek a formal relationship with ASEAN. Almost all the respondents (97.2%) welcome the UK’s closer engagement with ASEAN. However, support is not unconditional and the findings point to a graduated approach. 54.8% think that “ASEAN should consider other forms of engagement such as Sectoral and Developmental partnerships before discussing the Dialogue Partnership” status. This position is widely shared in the Philippines (70%), Laos (65.2%), and Indonesia (58.8%). Meanwhile, 42.4% of the respondents suggest that ASEAN should accord the Dialogue Partner status to the UK. This view is found among the majority of respondents from Cambodia (73.1%) and Singapore (50.9%).



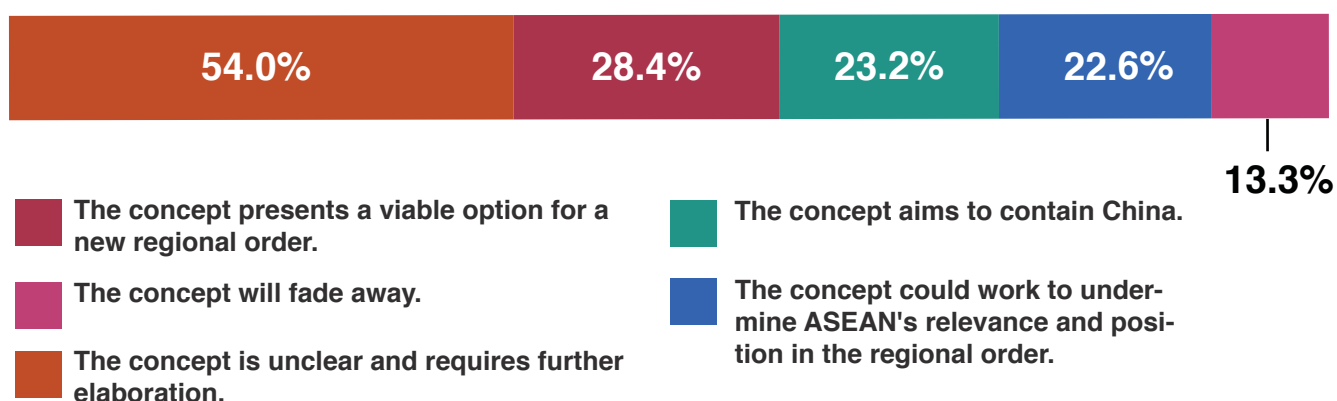
Q28 What is ASEAN’s most appropriate response to the United Kingdom (UK) after it leaves the European Union (EU)?*

Country	ASEAN should accept the UK's request for Dialogue Partner status.	ASEAN should consider other forms of engagement, such as Sectoral and Developmental partnerships, before discussing Dialogue Partnership.	ASEAN should reject the UK's request for Dialogue Partner status.
ASEAN	42.4%	54.8%	2.8%
Brunei	42.3%	54.6%	3.1%
Cambodia	73.1%	26.9%	0.0%
Indonesia	39.2%	58.8%	2.0%
Laos	30.4%	65.2%	4.4%
Malaysia	40.5%	58.3%	1.2%
Myanmar	41.8%	49.6%	8.6%
Philippines	28.5%	70.0%	1.5%
Singapore	50.9%	47.8%	1.3%
Thailand	41.7%	58.3%	0.0%
Vietnam	45.4%	53.3%	1.3%

Has Indo-Pacific turned the corner?

The region's understanding of Indo-Pacific has increased as the concept becomes a staple of regional discourse. The percentage of respondents who view the concept as "unclear and requires further elaboration" has decreased from 61.3% in 2019 to 54% in 2020. The countries that saw the greatest drop in the "unclear" category from 2019 to 2020 are Laos (65.5% to 39.1%) and Thailand (67% to 46.9%) respectively.

At the same time, acceptance of the concept appears to be on the upward trajectory as 28.4% of the 2020 survey respondents consider Indo-Pacific as a "viable option for a new regional order", compared to 17.2% in the 2019 survey. The increase in the level of acceptance is most noticeable amongst respondents from Thailand (+29.2%), Vietnam (+17.5%), Myanmar (+16.2%), and the Philippines (+13.8%). Conversely, the percentage of respondents who view the Indo-Pacific as detrimental to ASEAN's interests increased the most in Laos (10.3% to 34.8%) and the Philippines (15.1% to 29.9%) from 2019 to 2020.



Q29 How do you view the Indo-Pacific concept? (check those that apply)

Country	The concept presents a viable option for a new regional order.		The concept will fade away.		The concept is unclear and requires further elaboration.		The concept aims to contain China.		The concept could work to undermine ASEAN's relevance and position in the regional order.	
	2019	2020	2019	2020	2019	2020	2019	2020	2019	2020
ASEAN	17.2%	28.4%	11.8%	13.3%	61.3%	54.0%	25.4%	23.2%	17.3%	22.6%
Brunei	17.8%	22.7%	11.1%	13.4%	66.7%	57.7%	20.0%	22.7%	22.2%	26.8%
Cambodia	20.8%	19.2%	16.7%	11.5%	45.8%	42.3%	37.5%	38.5%	29.2%	26.9%
Indonesia	24.8%	31.1%	9.7%	23.0%	62.8%	56.8%	15.9%	17.6%	12.4%	19.6%
Laos	31.0%	30.4%	3.5%	8.7%	65.5%	39.1%	6.9%	17.4%	10.3%	34.8%
Malaysia	13.3%	20.9%	12.6%	12.9%	64.3%	60.1%	31.5%	34.4%	24.5%	27.6%
Myanmar	15.0%	31.2%	12.6%	8.6%	47.9%	40.2%	24.6%	20.9%	14.4%	21.7%
Philippines	26.4%	40.2%	9.4%	2.9%	58.5%	45.3%	17.0%	16.1%	15.1%	29.9%
Singapore	8.7%	14.4%	15.0%	18.9%	72.4%	73.0%	34.7%	27.5%	21.3%	26.6%
Thailand	12.5%	41.7%	14.3%	16.7%	67.0%	46.9%	27.7%	25.0%	17.9%	8.3%
Vietnam	18.7%	36.2%	9.8%	11.8%	60.2%	53.3%	27.6%	18.4%	12.2%	12.5%

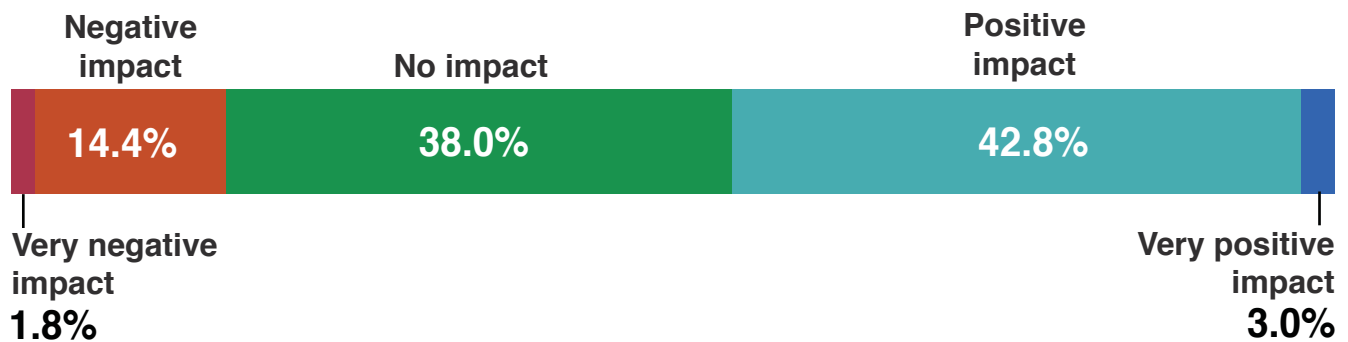
Is the Quad relevant?

After some false starts, the recent ministerial meeting among the Quad members at the sidelines of the United Nations General Assembly in September 2019 may be a sign that the Quad is finally taking root. However, support for the Quad remains soft, as less than half of the respondents (45.8%) acknowledged that it has had either a “positive” or “very positive” impact on regional security.

Conversely, the majority of the respondents (54.2%) view the Quad as having either “negative”, “very negative”, or “no impact”. Scepticism towards the Quad is strongly

felt in Indonesia (68.9%), Malaysia (67.5%), Laos (65.2%), Thailand (63.5%), and Cambodia (61.6%). The most enthusiastic Quad supporters are found in the Philippines (70.8%) and Vietnam (65.8%).

Support for the Quad is warmer among the South China Sea dispute claimants. Collectively, 53.2% of the respondents from Brunei, Malaysia, the Philippines, and Vietnam agree that the Quad has had a positive impact. In comparison, support for the Quad among respondents from the non-claimant states was lower at 40.6%.



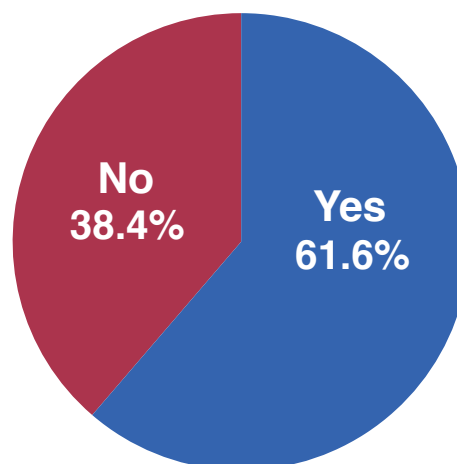
Q30 The Quadrilateral Security Dialogue (Quad), comprising Australia, India, Japan, and the US met at the ministerial level for the first time in September 2019. What impact does the Quad have on Southeast Asian security?*

Country	Very negative impact	Negative impact	No impact	Positive impact	Very positive impact
ASEAN	1.8%	14.4%	38.0%	42.8%	3.0%
Brunei	2.0%	12.4%	42.3%	43.3%	0.0%
Cambodia	7.7%	23.1%	30.8%	38.4%	0.0%
Indonesia	2.0%	17.6%	49.3%	31.1%	0.0%
Laos	4.4%	30.4%	30.4%	34.8%	0.0%
Malaysia	3.1%	19.0%	45.4%	30.7%	1.8%
Myanmar	1.2%	11.1%	40.6%	44.2%	2.9%
Philippines	1.4%	8.8%	19.0%	58.4%	12.4%
Singapore	0.4%	15.8%	41.4%	39.2%	3.2%
Thailand	2.1%	15.6%	45.8%	35.4%	1.1%
Vietnam	1.3%	11.2%	21.7%	62.5%	3.3%

Views on participating in Quad activities

Despite their divided opinions regarding the Quad's impact on regional security, 61.6% of the respondents think that their respective countries should participate in the security initiatives and military exercises under the Quad framework. The majority of respondents of all ASEAN member states – except Cambodia and Laos – agree with this proposition. The strongest support comes from the Philippines (84.7%), Myanmar (68%) and Vietnam (65.1%). Meanwhile, the strongest opposition is found in Cambodia (61.5%) and Laos (52.2%).

It bears reminding that participation in Quad activities may not necessarily equate to or translate into support for the Quad. Most ASEAN member states regularly conduct military exercises with the Quad members, e.g. Cobra Gold, Malabar and RIMPAC. In all likelihood, respondents who were favourable toward the idea of their countries participating in “Quad-led” activities see these actions as part of their countries’ multilateral security engagement and not necessarily as supporting a new strategic alignment or alliance.



Q31 Do you think your country should participate in security initiatives and military exercises organised under the “Quad” framework?*

Country	No	Yes
ASEAN	38.4%	61.6%
Brunei	42.3%	57.7%
Cambodia	61.5%	38.5%
Indonesia	49.3%	50.7%
Laos	52.2%	47.8%
Malaysia	49.1%	50.9%
Myanmar	32.0%	68.0%
Philippines	15.3%	84.7%
Singapore	40.1%	59.9%
Thailand	40.6%	59.4%
Vietnam	34.9%	65.1%

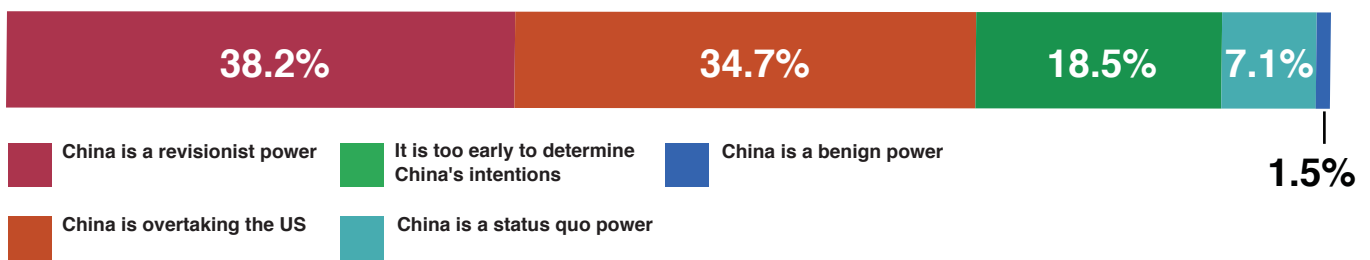
This section zeroes in on how Southeast Asians perceive China and America's engagements with the region, and the future of their countries' relations with the two major powers.

Impact of China's re-emergence as a major power

China's return as a major power is one of the most consequential phenomena in the 21st century. Its economic and political presence looms large in Southeast Asia, and the region is gradually waking up to this reality. 38.2% of the respondents believe that "China is a revisionist power and intends to turn Southeast Asia into its sphere of influence." This perspective is most prevalent in Vietnam (61.2%), the Philippines (54%), Malaysia (41.1%), and Singapore (40.6%). It is notable that the region's perception of China's revisionist intent is softening since the share of 38.2% in 2020 is lower than 45.4% in 2019. The second most widely held view is that "China is gradually taking over the US' role as a regional leader" (34.7%). Six ASEAN

member states – Cambodia (57.7%), Thailand (45.8%), Laos (39.1%), Indonesia (38.5%), Myanmar (38.5%), and Brunei (33%) – choose this option as their primary view on China's increasing regional clout.

In retrospect, the perception of China's intent to turn Southeast Asia into its sphere of influence is not mutually exclusive with the view of China's take-over of regional leadership from the US. Washington's shrinking diplomatic clout and ambivalent interest in ASEAN and regional affairs are paving the way for China to expand its regional influence and carve out a sphere of influence in Southeast Asia.



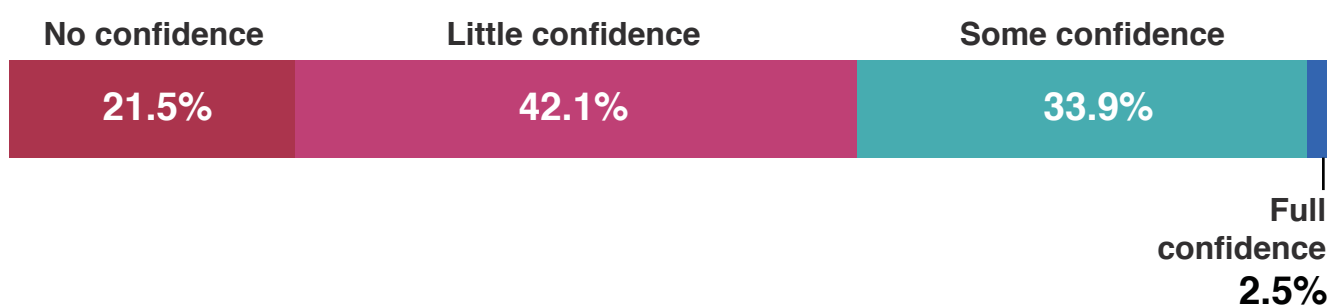
Q32 Which statement below most accurately reflects your view of China's re-emergence as a major power with respect to Southeast Asia?

Country	China is a revisionist power and intends to turn Southeast Asia into its sphere of influence.	China is gradually taking over the US' role as a regional leader.	It is too early to determine China's strategic intentions at this moment.	China is a status quo power and will continue to support the existing regional order.	China is a benign and benevolent power.
ASEAN	38.2%	34.7%	18.5%	7.1%	1.5%
Brunei	30.9%	33.0%	23.7%	12.4%	0.0%
Cambodia	23.0%	57.7%	11.5%	3.9%	3.9%
Indonesia	27.0%	38.5%	24.3%	9.5%	0.7%
Laos	17.4%	39.1%	39.1%	4.4%	0.0%
Malaysia	41.1%	36.2%	14.7%	8.0%	0.0%
Myanmar	25.8%	38.5%	23.4%	8.6%	3.7%
Philippines	54.0%	29.2%	13.1%	3.7%	0.0%
Singapore	40.6%	35.1%	16.2%	8.1%	0.0%
Thailand	33.3%	45.8%	14.6%	5.2%	1.1%
Vietnam	61.2%	17.1%	14.5%	2.0%	5.2%

Has BRI turned a new page?

It has not been all smooth sailing since the BRI was promulgated by President Xi Jinping in 2013. In response to negative feedback and allegations of its “debt-trap”, China pledged to rebrand the BRI to make it more “open, green and clean”. However, it appears that the region has not bought into the new pledges, and confidence in the BRI remains low. Most respondents (63.6%) have little or no confidence in the new BRI approach. With the exception

of Brunei, the majority of respondents in all ASEAN member states are sceptical of the “new” BRI. The sense of distrust is most visible in Vietnam (86.8%), the Philippines (72.3%), and Indonesia (69.6%). It does not bode well that little or no confidence is registered even in BRI recipient countries such as Myanmar (61.9%), Thailand (60.5%), Cambodia (57.7%), Malaysia (57.1%), and Laos (52.2%).



Q33 At the 2nd Belt and Road Forum in April 2019, China proposed a new approach to the Belt and Road Initiative (BRI), pledging to make it “open, green and clean.” Are you convinced that this approach will lead to a fairer deal for your country as a recipient of BRI loans?*

Country	I have no confidence in the new BRI approach.	I have little confidence in the new BRI approach.	I have some confidence in the new BRI approach.	I have full confidence in the new BRI approach.
ASEAN	21.5%	42.1%	33.9%	2.5%
Brunei	8.3%	41.2%	45.4%	5.1%
Cambodia	23.1%	34.6%	38.5%	3.8%
Indonesia	15.5%	54.1%	29.7%	0.7%
Laos	30.4%	21.8%	39.1%	8.7%
Malaysia	16.6%	40.5%	40.5%	2.4%
Myanmar	23.4%	38.5%	36.1%	2.0%
Philippines	32.1%	40.2%	24.8%	2.9%
Singapore	12.2%	42.3%	43.2%	2.3%
Thailand	16.7%	43.8%	36.4%	3.1%
Vietnam	43.4%	43.4%	11.9%	1.3%

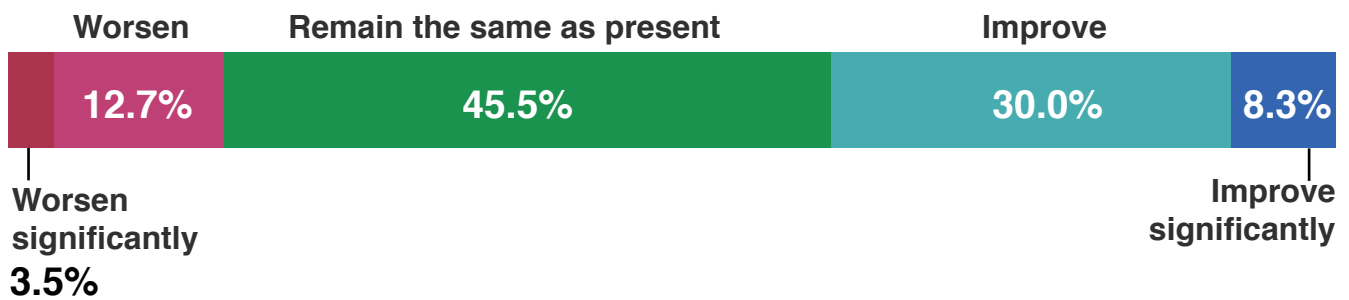
The future of China's relations with regional countries

China is the most active and proactive major power in engaging ASEAN and its member states. What is the scorecard of China's overtures to the region? Most of the respondents (45.5%) expect bilateral ties between their respective countries with China to "remain the same as present". Some 38.3% are upbeat and expect their country's relations with China to either improve or improve significantly in the next three years. In contrast, 16.2% expect bilateral ties to either worsen or worsen significantly over the same period. The three most optimistic ASEAN member states about relations with China are Laos (78.3%), Cambodia (69.2%), and Brunei (66%). At the other end of the spectrum, Vietnam (5.9%), Myanmar (25.8%), and the Philippines (29.2%) have the lowest number of optimistic respondents.

Among the 38.3% cohort that hold a positive view on relations with China, 55.5% identify "China's growing

economic dominance and political influence" in their respective countries as the single most important factor that could potentially derail the relations. The second and third most negative factors are China's perceived "strong-arm tactics in the South China Sea and the Mekong" (53.9%), and its use of "economic tools and tourism to punish their countries foreign policy choices" (45.5%).

What can China do to assuage or even win over the sceptics who make up 16.2% of the respondents? An overwhelming majority (74.1%) of this group would like to see China "resolve all territorial and maritime disputes with regional states peacefully in accordance with international law". They would also hope for China to "respect their countries' sovereignty and not constrain their foreign policy choices" (61.8%) and address the issue of trade imbalance that favours China (46.2%).



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

Country	Worsen significantly	Worsen	Remain the same as present	Improve	Improve significantly
ASEAN	3.5%	12.7%	45.5%	30.0%	8.3%
Brunei	0.0%	6.2%	27.8%	44.3%	21.7%
Cambodia	0.0%	0.0%	30.8%	30.8%	38.4%
Indonesia	1.4%	6.1%	38.5%	43.9%	10.1%
Laos	0.0%	0.0%	21.7%	52.2%	26.1%
Malaysia	0.0%	4.3%	52.8%	36.2%	6.7%
Myanmar	5.3%	9.9%	59.0%	21.3%	4.5%
Philippines	8.0%	29.2%	33.6%	21.9%	7.3%
Singapore	0.5%	12.6%	47.8%	35.1%	4.0%
Thailand	5.2%	8.3%	32.4%	38.5%	15.6%
Vietnam	9.2%	29.0%	55.9%	5.9%	0.0%

Q35 What are the concerns that could potentially worsen your positive impression of China?* (check up to three responses)

Answered: 501 (Respondents who chose the "Improve" and "Improve significantly" options in Q34)

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 the crisis in Hong Kong.	China's strong-arm tactics in the South China Sea and the Mekong.	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).
ASEAN	45.5%	33.1%	53.9%	55.5%	39.5%
Brunei	39.1%	45.3%	51.6%	61.0%	39.1%
Cambodia	44.4%	11.1%	38.9%	88.9%	22.2%
Indonesia	35.0%	46.3%	45.0%	63.7%	24.0%
Laos	44.4%	5.6%	50.0%	61.1%	38.9%
Malaysia	45.7%	54.3%	62.9%	38.6%	22.9%
Myanmar	38.1%	9.5%	38.1%	69.8%	68.3%
Philippines	22.5%	22.5%	72.5%	55.0%	27.5%
Singapore	67.8%	27.6%	63.2%	37.9%	72.4%
Thailand	61.5%	28.9%	55.8%	57.7%	15.4%
Vietnam	33.3%	55.6%	44.4%	55.6%	22.2%

Q36 What can China do to improve relations with your country?* (check up to three responses)

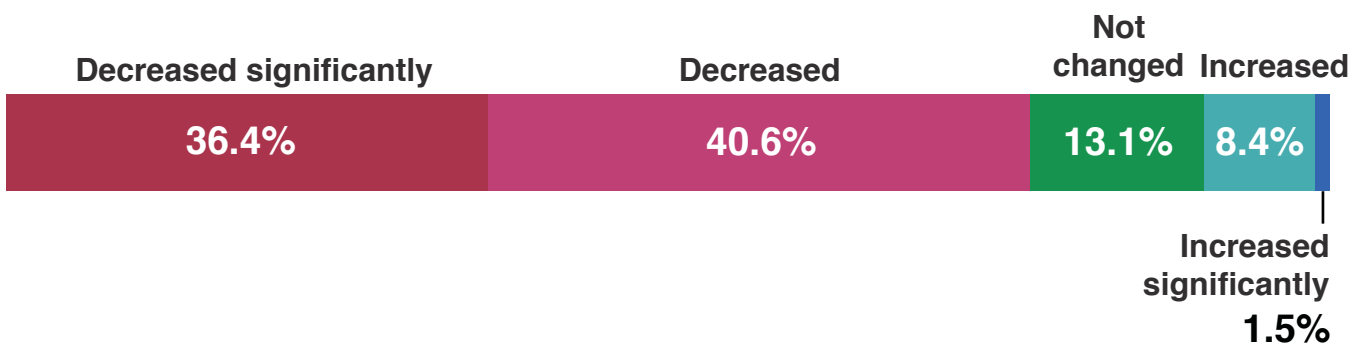
Answered: 212 (Respondents who chose the "Worsen" and "Worsen significantly" options in Q34)

Country	China should resolve all territorial and maritime disputes with regional states peacefully in accordance with international law.	China should make bilateral trade truly mutually beneficial by addressing the trade imbalance that favours China.	Deepen mutual understanding by enhancing people-to-people relations.	China should respect my country's sovereignty and not constrain my country's foreign policy choices.	The fault lines between China and my country are too wide and cannot be bridged.
ASEAN	74.1%	46.2%	20.8%	61.8%	8.5%
Brunei	83.3%	66.7%	33.3%	83.3%	0.0%
Cambodia	0.0%	0.0%	0.0%	0.0%	0.0%
Indonesia	54.6%	54.6%	27.3%	27.3%	18.2%
Laos	0.0%	0.0%	0.0%	0.0%	0.0%
Malaysia	57.1%	57.1%	14.3%	57.1%	0.0%
Myanmar	35.1%	64.9%	29.7%	67.6%	2.7%
Philippines	96.1%	35.3%	17.7%	60.8%	3.9%
Singapore	86.2%	44.8%	17.2%	82.8%	6.9%
Thailand	30.8%	69.2%	23.1%	38.5%	7.7%
Vietnam	87.9%	34.5%	17.2%	58.6%	17.2%

Assessing US engagement in the region

The region's view of the level of US engagement with Southeast Asia continues its pessimistic trajectory as the percentage of respondents who think that the level of engagement has either "decreased" or "decreased significantly" jumped from 68% in 2019 to 77% in 2020. This deepening sense of US disinterest in regional affairs is most acutely felt among respondents from Laos (+17.9%), Vietnam (+13.8%), Myanmar (+13.7%), Singapore (+12.4%)

and Thailand (+11.6%). The negative assessment of US engagement is highest among respondents from Singapore (89.7%), Cambodia (88.5%), and Malaysia (85.9%). It is also noteworthy that the negative opinion of US engagement in Vietnam has increased from 36.9% in 2019 to 50.7% in 2020. Vietnam was the only ASEAN member state where the respondents did not register a majority negative opinion in 2019.



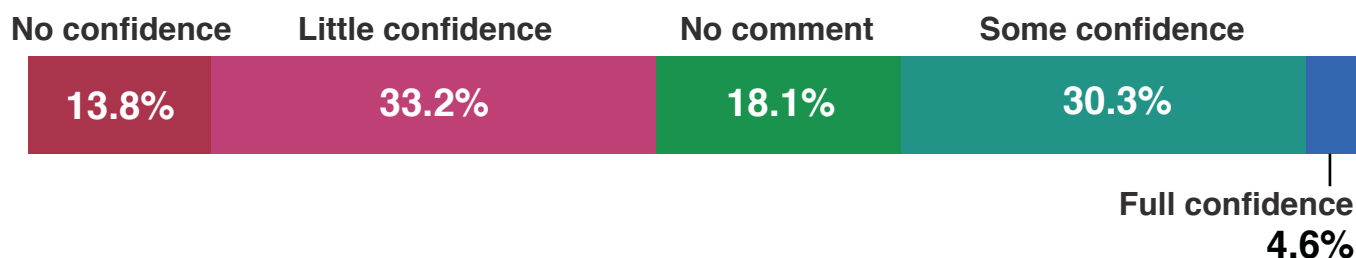
Q37 How has the level of US engagement with Southeast Asia changed under the Trump Administration compared to the Obama Administration?

Country	Decreased significantly		Decreased		Not changed from the Obama Administration		Increased		Increased significantly	
	2019	2020	2019	2020	2019	2020	2019	2020	2019	2020
ASEAN	16.8%	36.4%	51.2%	40.6%	18.7%	13.1%	11.4%	8.4%	1.9%	1.5%
Brunei	15.9%	45.3%	50.0%	32.0%	25.0%	18.6%	9.1%	4.1%	0.0%	0.0%
Cambodia	16.7%	57.7%	70.8%	30.8%	4.2%	3.8%	8.3%	7.7%	0.0%	0.0%
Indonesia	19.1%	41.9%	54.8%	37.8%	18.2%	16.2%	7.0%	3.4%	0.9%	0.7%
Laos	24.1%	39.2%	27.6%	30.4%	41.3%	13.0%	3.5%	13.0%	3.5%	4.4%
Malaysia	24.8%	43.6%	55.9%	42.3%	13.8%	8.0%	4.1%	4.3%	1.4%	1.8%
Myanmar	8.3%	30.7%	55.4%	46.7%	19.6%	12.7%	14.9%	8.2%	1.8%	1.7%
Philippines	21.6%	26.3%	49.6%	38.7%	18.0%	18.2%	7.2%	14.6%	3.6%	2.2%
Singapore	23.4%	47.8%	53.9%	41.9%	21.1%	6.8%	1.6%	3.1%	0.0%	0.4%
Thailand	17.5%	47.9%	55.3%	36.5%	13.2%	10.4%	12.3%	4.2%	1.7%	1.0%
Vietnam	3.3%	7.9%	33.6%	42.8%	22.1%	20.4%	36.1%	25.0%	4.9%	3.9%

Is the US a reliable strategic partner?

The 2020 survey findings show that confidence in the US as a strategic partner and provider of regional security continues to slip. The percentage of respondents with “little confidence” or “no confidence” in the US to assume such roles has increased from 34.6% in 2019 to 47% in 2020. At the same time, the overall percentage of respondents with “some confidence” or “full confidence” in the US as a strategic partner and provider of regional security registers a marginal increase from 31.9% to 34.9%. This minor

uptick can be largely attributed to the Philippines’ growing confidence in the US from 36.9% to 61.3%. The only two countries where confidence in the US exceeds the 50% threshold are the Philippines (61.3%) and Vietnam (52.6%). On the reverse side, six ASEAN member states see more than 50% of their respective respondents unconvinced of US reliability as a strategic partner: Indonesia (59.5%), Cambodia (57.7%), Thailand (57.3%), Brunei (53.6%), Malaysia (52.8%), and Singapore (52.7%).

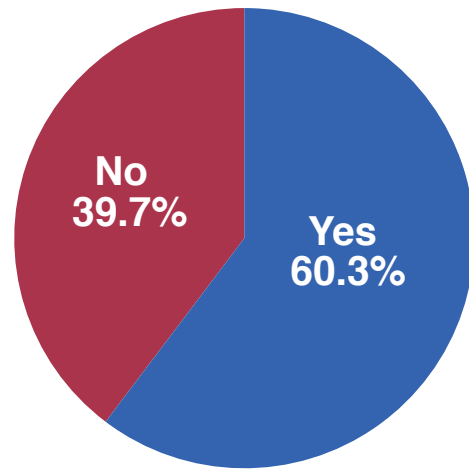


Q38 How confident are you of the US as a strategic partner and provider of regional security?

Country	No confidence		Little confidence		No comment		Some confidence		Full confidence	
	2019	2020	2019	2020	2019	2020	2019	2020	2019	2020
ASEAN	9.4%	13.8%	25.2%	33.2%	33.5%	18.1%	26.9%	30.3%	5.0%	4.6%
Brunei	13.6%	12.4%	31.8%	41.2%	29.6%	16.5%	20.4%	24.7%	4.6%	5.2%
Cambodia	0.0%	11.5%	16.7%	46.2%	37.5%	23.0%	45.8%	15.4%	0.0%	3.9%
Indonesia	11.3%	17.6%	24.3%	41.9%	42.6%	14.8%	20.9%	25.0%	0.9%	0.7%
Laos	13.8%	17.4%	20.7%	21.7%	41.4%	47.8%	20.7%	8.7%	3.4%	4.4%
Malaysia	9.0%	16.6%	38.9%	36.2%	25.7%	16.5%	20.8%	27.0%	5.6%	3.7%
Myanmar	8.2%	23.8%	21.2%	21.3%	41.2%	28.3%	25.3%	23.3%	4.1%	3.3%
Philippines	8.1%	5.1%	22.6%	24.1%	32.4%	9.5%	32.4%	49.6%	4.5%	11.7%
Singapore	7.9%	10.8%	30.2%	41.9%	26.2%	11.7%	29.4%	31.1%	6.3%	4.5%
Thailand	16.5%	13.5%	27.0%	43.8%	35.6%	18.7%	14.8%	21.9%	6.1%	2.1%
Vietnam	4.9%	4.0%	11.5%	24.3%	28.7%	19.1%	45.9%	46.0%	9.0%	6.6%

Is the gloomy opinion of US reliability reversible?

The prevailing regional mood on US engagement is pessimistic. President Donald Trump's repeated absence from ASEAN-related summits only serves to amplify the perception of US disinterest in regional affairs. It is unclear to what extent this erosion of confidence is due to Trump, but among the respondents who have lost confidence in the US as a strategic partner and provider of regional security, 60.3% think that their confidence in the US will increase if there is a change in American leadership. Conversely, 39.7% will not change their minds regardless of the outcome of the 2020 US presidential election. It appears that the PCW cohort (63.1%) are more likely than the CW cohort (57.4%) to regain their confidence in the US if there is a change in American leadership.



Q39 Will your confidence in the US as a strategic partner and provider of regional security improve if there is a change in the US leadership?*

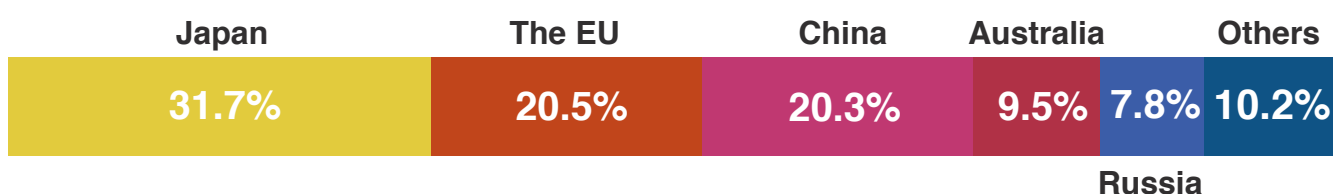
Answered: 615 (Respondents who chose the "Little confidence" and "No confidence" options in Q38)

Country	No, my confidence in the US will remain low.	Yes, my confidence in the US will increase.
ASEAN	39.7%	60.3%
Brunei	28.8%	71.2%
Cambodia	40.0%	60.0%
Indonesia	35.2%	64.8%
Laos	66.7%	33.3%
Malaysia	38.4%	61.6%
Myanmar	60.0%	40.0%
Philippines	40.0%	60.0%
Singapore	23.1%	76.9%
Thailand	30.9%	69.1%
Vietnam	62.8%	37.2%

Who will the region turn to in America's absence?

If the US is perceived to be increasingly taking a “back seat” in regional security, who can the region turn to for new partnerships? The most preferred strategic partner is Japan which garners the highest number of supporters at 31.7%, followed by the EU (20.5%) and China (20.3%). Japan is the top choice in six ASEAN member states: the Philippines (45%), Myanmar (38.2%), Malaysia (34.9%), Vietnam (34.9%), Brunei (34.6%), and Cambodia (33.3%). The EU is the top choice in Thailand (36.4%), Indonesia (30.7%), and Singapore (23.9%). China is the top choice in

Laos (44.5%), Cambodia (33.3%), and Singapore (23.9%). The top choice in Cambodia is shared by both China and Japan, while that in Singapore is shared by both China and the EU. Singapore’s case is also unique as the gap of preference among the top choices is very minimal: China (23.9%), the EU (23.9%) and Japan (23.1%), suggesting an interesting angle of its approach towards other major powers in hedging against the US’ perceived disinterest in the region.



Q40 If the US is perceived as unreliable, who would you look to as your country’s preferred strategic partner?*

Answered: 615 (Respondents who chose the "Little confidence" and "No confidence" options in Q38)

Country	Australia	China	The European Union	India	Japan	New Zealand	Republic of Korea	Russia
ASEAN	9.5%	20.3%	20.5%	4.7%	31.7%	3.7%	1.8%	7.8%
Brunei	5.8%	25.0%	11.5%	0.0%	34.6%	7.7%	9.6%	5.8%
Cambodia	6.7%	33.3%	20.0%	6.7%	33.3%	0.0%	0.0%	0.0%
Indonesia	10.2%	11.4%	30.7%	6.8%	29.5%	2.3%	3.4%	5.7%
Laos	0.0%	44.5%	0.0%	0.0%	22.2%	0.0%	0.0%	33.3%
Malaysia	8.1%	21.0%	18.6%	2.3%	34.9%	8.1%	0.0%	7.0%
Myanmar	2.7%	21.8%	10.0%	7.3%	38.2%	0.9%	0.0%	19.1%
Philippines	25.0%	5.0%	12.5%	2.5%	45.0%	0.0%	0.0%	10.0%
Singapore	16.2%	23.9%	23.9%	5.1%	23.1%	6.0%	0.9%	0.9%
Thailand	3.6%	30.9%	36.4%	1.8%	21.8%	3.7%	1.8%	0.0%
Vietnam	9.3%	9.3%	23.3%	9.3%	34.9%	0.0%	2.3%	11.6%

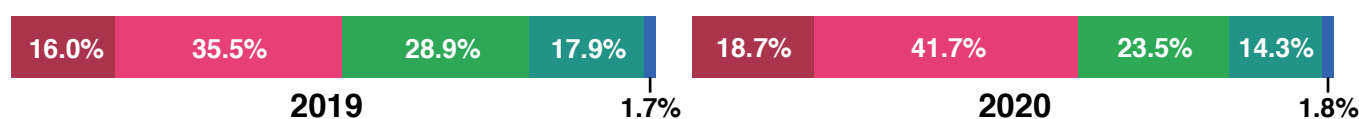
This section measures the levels of trust in the major powers to “do the right thing” in the wider interests of the global community.

China

The majority of respondents (60.4%) have either “little confidence” (41.7%) or “no confidence” (18.7%) in China to “do the right thing” to contribute to global peace, security, prosperity and governance. Only 16.1% are either “confident” or “very confident” that China will step up in the positive sense. Overall, the results show a deterioration of trust in China. The percentage of distrust has widened from 51.5% in 2019 to 60.4% in 2020 just as the percentage of trust declined from 19.6% to 16.1%. The overall sentiment of distrust (“little confidence” and “no confidence” options) has increased across all ASEAN member states except Cambodia. The share of distrust towards China in Cambodia has decreased from 58.3% (2019) to 53.8% (2020), but the prevailing mood about China remains negative nonetheless. This is noteworthy since Cambodia is seen as one of China’s closest allies in the region. The majority of respondents in all ASEAN member states, except Brunei and Laos, are distrustful of China. The most pessimistic view about China is found in the Philippines (78.9%), Vietnam (77%), Indonesia (70.3%), Thailand (62.5%), and Singapore (59%).

Younger respondents (PCW cohort) have less confidence in China than their senior counterparts (CW cohort). 65.3% of the PCW cohort have little or no confidence in China to “do the right thing”, compared to 55.4% of the CW cohort. At the same time, confidence in China amongst the PCW cohort is also lower at 10.3%, compared to 22.1% amongst the CW cohort.

Among the respondents who have distrust towards China, 53.5% think that China’s economic and military power could be used to threaten their country’s interest and sovereignty. This position is most prevalent in the Philippines (73.2%), Cambodia (71.4%), and Malaysia (62.7%). Also in this cohort, 19.1% do not trust China out of the consideration that China is not a reliable power. Among those who have a more benign and positive view of China, 52.4% attribute their trust in China to “its vast economic resources and strong political will to provide global leadership”.



Q41 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	
	2019	2020	2019	2020	2019	2020	2019	2020	2019	2020
ASEAN	16.0%	18.7%	35.5%	41.7%	28.9%	23.5%	17.9%	14.3%	1.7%	1.8%
Brunei	2.2%	9.3%	35.6%	35.0%	35.6%	36.1%	22.2%	17.5%	4.4%	2.1%
Cambodia	8.3%	3.8%	50.0%	50.0%	20.8%	7.7%	16.7%	38.5%	4.2%	0.0%
Indonesia	11.3%	11.5%	49.6%	58.8%	20.0%	17.5%	17.4%	12.2%	1.7%	0.0%
Laos	3.5%	8.7%	6.9%	21.8%	48.3%	30.4%	31.0%	26.1%	10.3%	13.0%
Malaysia	8.3%	13.5%	37.5%	37.4%	29.2%	24.5%	23.6%	21.5%	1.4%	3.1%
Myanmar	13.5%	21.7%	24.1%	29.1%	41.2%	36.5%	20.0%	11.5%	1.2%	1.2%
Philippines	25.9%	28.5%	40.7%	50.4%	22.2%	10.9%	9.3%	9.5%	1.9%	0.7%
Singapore	13.3%	10.4%	33.6%	48.6%	32.0%	19.4%	20.3%	19.4%	0.8%	2.2%
Thailand	14.3%	21.9%	37.5%	40.6%	24.1%	20.8%	22.3%	15.6%	1.8%	1.1%
Vietnam	37.9%	38.2%	35.5%	38.8%	21.0%	19.7%	5.6%	1.3%	0.0%	2.0%

Q42 Why do you trust China?*

Answered: 210 (Respondents who chose the "Confident" and "Very confident" options in Q41)

Country	China has vast economic resources and strong political will to provide global leadership.	My country's political culture and worldview are compatible with 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.
ASEAN	52.4%	11.4%	10.5%	7.6%	18.1%
Brunei	57.9%	5.3%	5.3%	10.5%	21.0%
Cambodia	50.0%	30.0%	0.0%	0.0%	20.0%
Indonesia	44.4%	5.6%	22.2%	11.1%	16.7%
Laos	55.6%	33.3%	0.0%	0.0%	11.1%
Malaysia	55.0%	10.0%	5.0%	7.5%	22.5%
Myanmar	67.7%	12.9%	9.7%	3.2%	6.5%
Philippines	43.0%	7.1%	7.1%	21.4%	21.4%
Singapore	47.9%	8.3%	16.7%	6.3%	20.8%
Thailand	50.0%	18.8%	6.2%	0.0%	25.0%
Vietnam	20.0%	0.0%	40.0%	40.0%	0.0%

Q43 Why do you distrust China?*

Answered: 791 (Respondents who chose the "Little confidence" and "No confidence" options in Q41)

Country	China does not have the capacity or political will for global leadership.	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 interest and sovereignty.	I do not consider China a reliable power.
ASEAN	9.5%	9.5%	8.4%	53.5%	19.1%
Brunei	7.0%	11.6%	18.6%	55.8%	7.0%
Cambodia	14.3%	0.0%	0.0%	71.4%	14.3%
Indonesia	14.4%	15.4%	19.2%	30.8%	20.2%
Laos	28.7%	0.0%	14.3%	57.0%	0.0%
Malaysia	4.8%	14.5%	9.6%	62.7%	8.4%
Myanmar	12.9%	7.3%	6.4%	59.7%	13.7%
Philippines	4.6%	11.1%	2.8%	73.2%	8.3%
Singapore	8.4%	12.2%	6.1%	42.8%	30.5%
Thailand	13.3%	5.0%	13.4%	43.3%	25.0%
Vietnam	7.7%	1.7%	2.6%	56.4%	31.6%

The European Union

In general, Southeast Asians have a relatively positive view about the EU. 38.7% of the respondents are confident or very confident that the EU will “do the right thing”, compared to 36.9% who have little or no confidence. Nevertheless, the positive view takes a slight dip as the overall share of trust has declined from 41.3% in 2019 to 38.7% in 2020 while the share of distrust increased marginally from 35.2% to 36.9%. The highest levels of trust in the EU are found in the Philippines (54%), Indonesia (52.7%), and Thailand (44.8%). Respondents from Cambodia (46.2%), Myanmar (44.2%) and Laos (43.5%) are the most distrustful of the EU. Cambodia and Laos also see the biggest change in perceptions towards the EU since the 2019 survey: the level of distrust has jumped from 8.3% to 46.2% in Cambodia, and from

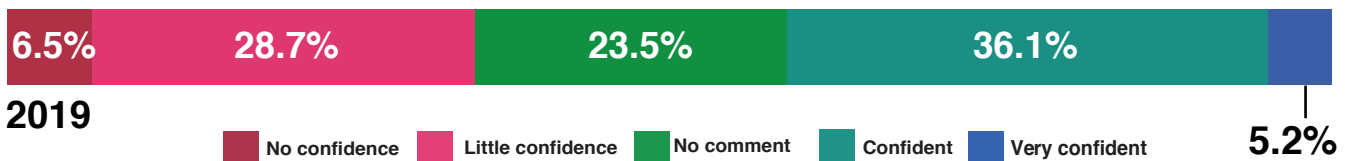
31% to 43.5% in Laos, while the level of trust declined from 58.4% to 38.5% in Cambodia, and from 31% to 21.7% in Laos.

The region’s outlook on the EU is generally positive and a large part of its trust rests on EU credentials as a leader in international law. Among the 38.7% cohort who have trust in the EU, a big majority of them (68%) think that “the EU is a responsible stakeholder that respects and champions international law.” This view is widely shared by respondents from Singapore (86.1%), Malaysia (75%), and Thailand (72.1%). However, more than one third (35.4%) of the region’s sceptics on the EU are concerned that it “is distracted with its internal affairs and thus cannot focus on global concerns and issues”.

2020



2019



Q44 How confident are you that the European Union will "do the right thing" to contribute to global peace, security, prosperity and governance?

Country	No confidence		Little confidence		No comment		Confident		Very confident	
	2019	2020	2019	2020	2019	2020	2019	2020	2019	2020
ASEAN	6.5%	6.6%	28.7%	30.3%	23.5%	24.4%	36.1%	34.0%	5.2%	4.7%
Brunei	8.9%	7.2%	35.5%	29.9%	26.7%	35.1%	26.7%	24.7%	2.2%	3.1%
Cambodia	0.0%	3.9%	8.3%	42.3%	33.3%	15.3%	54.2%	34.6%	4.2%	3.9%
Indonesia	5.2%	3.4%	31.3%	27.7%	18.3%	16.2%	39.1%	48.7%	6.1%	4.0%
Laos	10.3%	17.4%	20.7%	26.1%	38.0%	34.8%	31.0%	21.7%	0.0%	0.0%
Malaysia	6.2%	6.8%	27.8%	33.7%	18.0%	17.8%	43.8%	36.2%	4.2%	5.5%
Myanmar	11.7%	13.5%	35.1%	30.7%	28.7%	33.2%	21.0%	20.1%	3.5%	2.5%
Philippines	0.9%	3.7%	23.6%	24.8%	15.5%	17.5%	46.4%	43.8%	13.6%	10.2%
Singapore	10.2%	4.0%	26.5%	33.3%	24.2%	23.9%	35.2%	33.8%	3.9%	5.0%
Thailand	4.4%	5.2%	30.1%	26.0%	19.5%	24.0%	42.5%	38.5%	3.5%	6.3%
Vietnam	3.3%	4.6%	27.6%	30.3%	30.9%	25.6%	32.5%	36.2%	5.7%	3.3%

Q45 Why do you trust the EU?*

Answered: 506 (Respondents who chose the "Confident" and "Very confident" options in Q44)

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.
ASEAN	14.8%	3.8%	68.0%	4.1%	9.3%
Brunei	25.9%	0.0%	63.0%	3.7%	7.4%
Cambodia	20.0%	10.0%	50.0%	0.0%	20.0%
Indonesia	16.7%	1.3%	67.9%	5.1%	9.0%
Laos	60.0%	0.0%	40.0%	0.0%	0.0%
Malaysia	7.3%	5.9%	75.0%	1.5%	10.3%
Myanmar	27.3%	1.8%	50.9%	9.1%	10.9%
Philippines	17.5%	6.8%	58.1%	10.8%	6.8%
Singapore	3.5%	2.3%	86.1%	2.3%	5.8%
Thailand	16.3%	2.3%	72.1%	0.0%	9.3%
Vietnam	11.7%	6.7%	66.6%	0.0%	15.0%

Q46 Why do you distrust the EU?*

Answered: 483 (Respondents who chose the "Little confidence" and "No confidence" options in Q44)

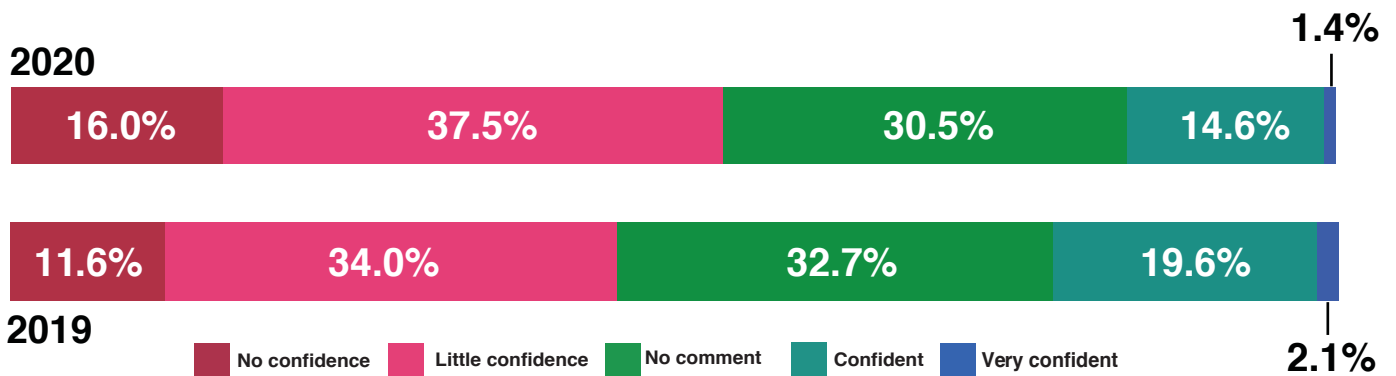
Country	The EU does not have the capacity or political will for global leadership.	My country's political culture and worldview are incompatible with the EU's.	I am concerned that the EU is distracted with its internal affairs and thus cannot focus on global concerns and issues.	The EU's economic and military power could be used to threaten my country's interest and sovereignty.	I do not consider the EU a reliable power.
ASEAN	33.7%	16.6%	35.4%	3.5%	10.8%
Brunei	19.4%	27.8%	30.6%	8.3%	13.9%
Cambodia	58.3%	16.7%	16.7%	0.0%	8.3%
Indonesia	15.2%	15.2%	54.4%	2.2%	13.0%
Laos	30.0%	20.0%	30.0%	10.0%	10.0%
Malaysia	37.9%	13.6%	33.4%	1.5%	13.6%
Myanmar	33.3%	28.7%	15.8%	7.4%	14.8%
Philippines	28.2%	20.5%	38.5%	0.0%	12.8%
Singapore	50.6%	1.2%	42.2%	0.0%	6.0%
Thailand	30.0%	16.7%	36.7%	6.6%	10.0%
Vietnam	30.2%	9.4%	56.6%	1.9%	1.9%

India

India's standing as a major power in the region is in question as positive sentiments towards India continue to decline. The overall share of trust has declined from 21.7% in 2019 to 16% in 2020 and the overall share of distrust increased from 45.6% to 53.5%. The percentage of distrust outnumbers the percentage of trust by more than three times. Doubts about India are most prevalent in Cambodia (76.9%), Malaysia (67.5%), and Singapore (67.1%). The strongest support for India is found among respondents from the Philippines (32.8%), Vietnam (22.4%), and Myanmar (19.7%). Cambodia and Singapore have the most significant shift in perceptions towards India. Cambodia's trust level in India has declined from 16.7% in 2019 to 7.7% in 2020 while the distrust level increased from 50%

to 76.9%. Singapore's positive view on India has decreased from 20.3% in 2019 to 8.6% in 2020 and its negative view increased from 50% to 67.1%.

Among the respondents who do not trust India, 41.6% do not think India has "the capacity or political will for global leadership". Respondents from Laos (80%), Cambodia (60%) and Vietnam (58.9%) are the strongest advocate of this opinion. In addition, 38.3% of the distrust cohort are concerned that "India is distracted with its internal and sub-continental affairs." The region's trust deficit in India can therefore be attributed to the perceptions of New Delhi's lack of interest and capacity, instead of visceral feelings of acrimony or wariness.



Q47 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	
	2019	2020	2019	2020	2019	2020	2019	2020	2019	2020
ASEAN	11.6%	16.0%	34.0%	37.5%	32.7%	30.5%	19.6%	14.6%	2.1%	1.4%
Brunei	8.9%	15.5%	35.6%	36.1%	33.3%	38.1%	22.2%	10.3%	0.0%	0.0%
Cambodia	16.7%	23.1%	33.3%	53.8%	33.3%	15.4%	12.5%	7.7%	4.2%	0.0%
Indonesia	16.5%	20.2%	38.3%	44.6%	29.6%	23.0%	13.0%	11.5%	2.6%	0.7%
Laos	10.7%	30.4%	17.9%	13.0%	57.1%	43.5%	14.3%	13.1%	0.0%	0.0%
Malaysia	12.6%	25.2%	39.8%	42.3%	29.4%	20.3%	16.8%	11.0%	1.4%	1.2%
Myanmar	7.6%	9.4%	29.2%	29.1%	33.9%	41.8%	27.5%	17.2%	1.8%	2.5%
Philippines	8.3%	2.9%	33.3%	32.9%	35.2%	31.4%	20.4%	29.9%	2.8%	2.9%
Singapore	15.6%	23.0%	34.4%	44.1%	29.7%	24.3%	19.5%	7.7%	0.8%	0.9%
Thailand	12.3%	18.8%	37.7%	37.5%	30.7%	33.3%	18.4%	10.4%	0.9%	0.0%
Vietnam	9.7%	9.8%	29.8%	34.9%	34.7%	32.9%	20.2%	20.4%	5.6%	2.0%

Q48 Why do you trust India?*

Answered: 209 (Respondents who chose the "Confident" and "Very confident" options in Q47)

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.
ASEAN	23.9%	15.3%	31.1%	7.7%	22.0%
Brunei	40.0%	10.0%	20.0%	10.0%	20.0%
Cambodia	50.0%	0.0%	50.0%	0.0%	0.0%
Indonesia	27.8%	27.8%	16.7%	11.0%	16.7%
Laos	66.7%	0.0%	33.3%	0.0%	0.0%
Malaysia	25.0%	15.0%	35.0%	5.0%	20.0%
Myanmar	25.0%	16.7%	20.8%	2.1%	35.4%
Philippines	22.2%	13.3%	22.2%	17.8%	24.5%
Singapore	10.5%	0.0%	68.5%	10.5%	10.5%
Thailand	20.0%	30.0%	0.0%	0.0%	50.0%
Vietnam	20.6%	17.7%	52.9%	2.9%	5.9%

Q49 Why do you distrust India?*

Answered: 700 (Respondents who chose the "Little confidence" and "No confidence" options in Q47)

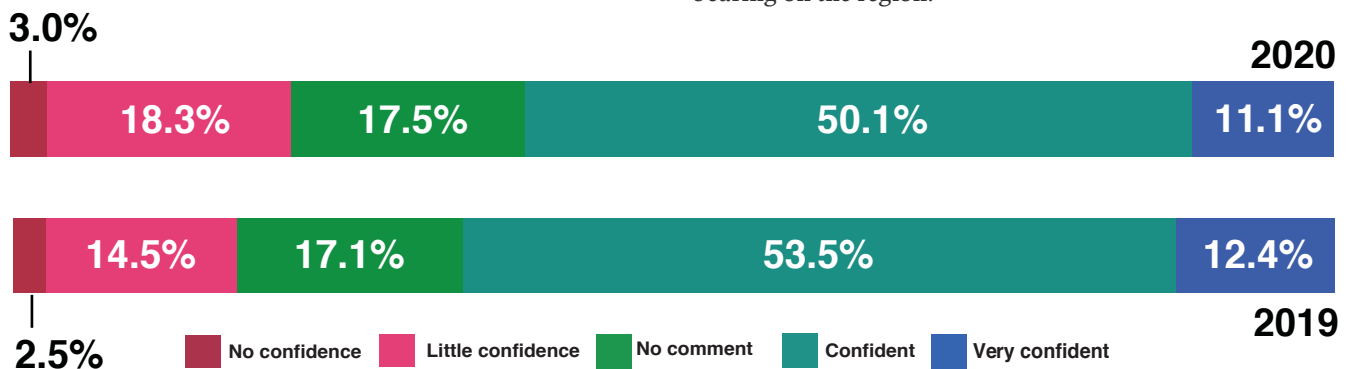
Country	India does not have the capacity or political will for global leadership.	My country's political culture and worldview are incompatible with India's.	I am concerned that India is distracted with its internal and sub-continental affairs and thus cannot focus on global concerns and issues.	India's economic and military power could be used to threaten my country's interest and sovereignty.	I do not consider India a reliable power.
ASEAN	41.6%	4.0%	38.3%	2.5%	13.6%
Brunei	24.0%	8.0%	50.0%	2.0%	16.0%
Cambodia	60.0%	5.0%	15.0%	0.0%	20.0%
Indonesia	46.9%	4.2%	31.2%	2.1%	15.6%
Laos	80.0%	0.0%	10.0%	0.0%	10.0%
Malaysia	33.7%	1.8%	49.1%	3.6%	11.8%
Myanmar	41.5%	8.5%	26.6%	8.5%	14.9%
Philippines	40.8%	6.1%	38.8%	0.0%	14.3%
Singapore	38.3%	0.7%	48.3%	0.0%	12.7%
Thailand	38.9%	5.6%	38.9%	1.8%	14.8%
Vietnam	58.9%	2.9%	26.5%	2.9%	8.8%

Japan

Japan remains the most trusted major power in the region but its star does not shine as brightly as it did in the 2019 survey. Its overall share of trust has dipped from 65.9% in 2019 to 61.2% in 2020 while the overall share of distrust increased from 17% to 21.3%. Japan is the only major power in the survey to achieve the overall share of trust above the 50% threshold. Trust in Japan is widely shared in the Philippines (84.6%), Cambodia (69.3%), and Indonesia (60.2%). At the same time, the highest level of distrust is noted in Singapore (27.5%), Laos (26%), and Malaysia (25.2%). The largest swing in perceptions towards Japan is found in Cambodia and Vietnam. Cambodia's distrust level towards Japan has increased from 0% in 2019 to 23% in 2020 while the trust level decreased from 87.5% to 69.3%. Vietnam's negative view of Japan has increased

from 12.2% in 2019 to 21.7% in 2020 and its positive view decreased from 69.1% to 59.9%.

Among the respondents who trust Japan, 51% view it as “a responsible stakeholder that respects and champions international law”. This view is widely shared in Singapore (72.4%), Vietnam (60.4%), and Thailand (56.6%). Nearly a quarter (23.3%) of this cohort “respect and admire Japan for its civilisation and culture”. Among those who distrust Japan, nearly half (49.5%) think it “does not have the capacity or political will for leadership”, and more than a quarter (26.9%) are concerned that Japan “is distracted with its internal affairs and its relations with its Northeast Asian neighbours”. It is noteworthy that none of the reasons for distrust is related to any perceived Japanese negative attribute or behaviour that may have a bearing on the region.



Q50 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	
	2019	2020	2019	2020	2019	2020	2019	2020	2019	2020
ASEAN	2.5%	3.0%	14.5%	18.3%	17.1%	17.5%	53.5%	50.1%	12.4%	11.1%
Brunei	4.4%	1.0%	13.3%	13.4%	28.9%	21.7%	46.7%	53.6%	6.7%	10.3%
Cambodia	0.0%	0.0%	0.0%	23.0%	12.5%	7.7%	79.2%	65.4%	8.3%	3.9%
Indonesia	2.6%	4.7%	20.2%	18.9%	14.9%	16.2%	50.9%	51.4%	11.4%	8.8%
Laos	6.9%	4.4%	17.2%	21.6%	31.0%	34.8%	34.5%	34.8%	10.4%	4.4%
Malaysia	2.8%	3.1%	17.5%	22.1%	11.9%	18.4%	57.3%	45.4%	10.5%	11.0%
Myanmar	0.6%	3.3%	11.7%	17.6%	15.8%	20.5%	52.6%	45.5%	19.3%	13.1%
Philippines	0.9%	2.2%	9.1%	6.6%	7.3%	6.6%	62.7%	59.1%	20.0%	25.5%
Singapore	3.1%	3.6%	22.1%	23.9%	23.6%	15.3%	44.1%	50.0%	7.1%	7.2%
Thailand	3.5%	3.1%	14.9%	17.7%	21.1%	24.0%	50.9%	49.0%	9.6%	6.2%
Vietnam	3.3%	2.0%	8.9%	19.7%	18.7%	18.4%	58.5%	51.3%	10.6%	8.6%

Q51 Why do you trust Japan?*

Answered: 800 (Respondents who chose the "Confident" and "Very confident" options in Q50)

Country	Japan has vast economic resources and the political will to provide global leadership.	My country's political culture and worldview are compatible with Japan's.	Japan is a responsible stakeholder that respects and champions international law.	Japan's military power is an asset for global peace and security.	I respect Japan and admire its civilisation and culture.
ASEAN	18.5%	5.8%	51.0%	1.5%	23.2%
Brunei	19.4%	3.2%	54.8%	0.0%	22.6%
Cambodia	22.2%	5.6%	50.0%	0.0%	22.2%
Indonesia	14.6%	7.9%	48.3%	1.1%	28.1%
Laos	44.5%	0.0%	22.2%	0.0%	33.3%
Malaysia	21.7%	10.9%	47.8%	0.0%	19.6%
Myanmar	22.4%	4.2%	40.5%	0.0%	32.9%
Philippines	31.0%	4.3%	35.4%	5.2%	24.1%
Singapore	8.6%	1.6%	72.4%	2.4%	15.0%
Thailand	13.2%	5.7%	56.6%	3.8%	20.7%
Vietnam	9.9%	11.0%	60.4%	0.0%	18.7%

Q52 Why do you distrust Japan?*

Answered: 279 (Respondents who chose the "Little confidence" and "No confidence" options in Q50)

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

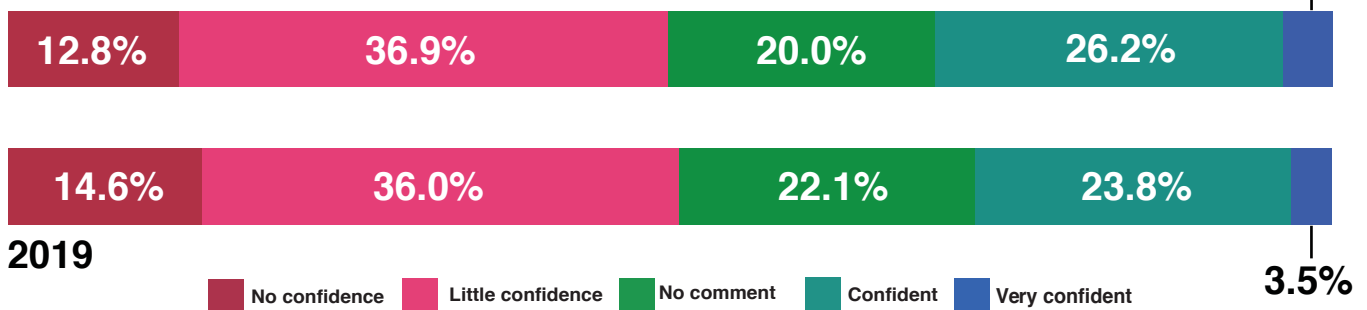
The US

Against all odds, the region’s trust in the US has improved marginally from 27.3% in 2019 to 30.3% in 2020 while the share of distrust remains relatively unchanged (50.6% in 2019 compared to 49.7% in 2020). Confidence in the US is highest among respondents from the Philippines (55.4%), Vietnam (51.3%), and Cambodia (34.7%), while sceptics abound in Thailand (61.5%), Indonesia (60.8%), and Malaysia (58.9%). The most noticeable shift in perceptions is found in Laos and the Philippines. Laos’ distrust towards the US has decreased from 55.2% in 2019 to 39.1% in 2020 and trust moved upward from 10.3% to 21.8%. In the Philippines, the level of distrust has declined

from 44.6% in 2019 to 30.7% in 2020, and the level of trust improved from 45.4% to 55.4%.

Among the respondents who do not trust the US, more than one in four (42.8%) are concerned that Washington is distracted by its internal affairs. This perspective is widely heard among respondents from Singapore (59.8%), the Philippines (59.5%), and Vietnam (56.4%). Meanwhile, 21.8% of this cohort think that “US economic and military power could be used to threaten their countries’ interest and sovereignty”.

2020



Q53 How confident are you that the United States will "do the right thing" to contribute to global peace, security, prosperity and governance?

Country	No confidence		Little confidence		No comment		Confident		Very confident	
	2019	2020	2019	2020	2019	2020	2019	2020	2019	2020
ASEAN	14.6%	12.8%	36.0%	36.9%	22.1%	20.0%	23.8%	26.2%	3.5%	4.1%
Brunei	28.9%	14.4%	35.5%	41.2%	15.6%	28.9%	20.0%	13.4%	0.0%	2.1%
Cambodia	0.0%	11.5%	41.7%	42.3%	16.6%	11.5%	41.7%	34.7%	0.0%	0.0%
Indonesia	15.7%	10.1%	45.2%	50.7%	17.4%	18.9%	20.0%	20.3%	1.7%	0.0%
Laos	34.5%	21.7%	20.7%	17.4%	34.5%	39.1%	0.0%	17.4%	10.3%	4.4%
Malaysia	16.0%	20.9%	47.9%	38.0%	18.0%	17.2%	14.6%	19.6%	3.5%	4.3%
Myanmar	13.5%	22.1%	31.6%	26.6%	31.0%	22.6%	21.6%	23.4%	2.3%	5.3%
Philippines	6.4%	4.4%	38.2%	26.3%	10.0%	13.9%	40.0%	47.4%	5.4%	8.0%
Singapore	15.6%	8.1%	32.8%	49.1%	21.9%	17.6%	27.4%	22.5%	2.3%	2.7%
Thailand	27.2%	16.7%	33.3%	44.8%	25.4%	18.7%	13.2%	19.8%	0.9%	0.0%
Vietnam	1.6%	1.3%	25.8%	24.4%	27.4%	23.0%	36.3%	42.1%	8.9%	9.2%

Q54 Why do you trust the US?*

Answered: 397 (Respondents who chose the "Confident" and "Very confident" options in Q53)

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.
ASEAN	44.3%	4.5%	15.4%	30.5%	5.3%
Brunei	33.3%	0.0%	33.3%	26.7%	6.7%
Cambodia	22.2%	0.0%	22.2%	44.5%	11.1%
Indonesia	43.3%	0.0%	13.3%	36.7%	6.7%
Laos	60.0%	0.0%	20.0%	20.0%	0.0%
Malaysia	38.5%	0.0%	15.3%	38.5%	7.7%
Myanmar	44.3%	2.8%	18.6%	25.7%	8.6%
Philippines	35.5%	14.5%	14.5%	32.9%	2.6%
Singapore	28.6%	1.8%	19.6%	46.4%	3.6%
Thailand	31.6%	10.5%	15.8%	36.8%	5.3%
Vietnam	74.4%	2.6%	6.4%	12.8%	3.8%

Q55 Why do you distrust the US?*

Answered: 649 (Respondents who chose the "Little confidence" and "No confidence" options in Q53)

Country	The US does not have the capacity or political will for global leadership.	My country's political culture and worldview are incompatible with the US'.	I am concerned that the US is distracted with its internal affairs and thus cannot focus on global concerns and issues.	The US' economic and military power could be used to threaten my country's interest and sovereignty.	I do not consider the US a reliable power.
ASEAN	7.1%	9.2%	42.8%	21.8%	19.1%
Brunei	7.4%	9.3%	33.3%	31.5%	18.5%
Cambodia	0.0%	21.4%	21.4%	28.6%	28.6%
Indonesia	6.7%	6.7%	50.0%	28.9%	7.7%
Laos	11.1%	55.6%	0.0%	33.3%	0.0%
Malaysia	9.4%	1.0%	36.4%	29.2%	24.0%
Myanmar	5.9%	26.9%	23.5%	27.7%	16.0%
Philippines	4.8%	0.0%	59.5%	9.5%	26.2%
Singapore	9.5%	3.2%	59.8%	5.5%	22.0%
Thailand	5.1%	0.0%	44.1%	25.4%	25.4%
Vietnam	5.1%	10.3%	56.4%	10.3%	17.9%

Analysing the "trust issue" among Southeast Asians

The “trust” and “distrust” rankings of the major powers are based on the combined “positive” (“Confident” and “Very confident”) and negative responses (“Little confidence” and “No confidence”) of the respondents for Questions 41, 44, 47, 50, and 53. The trust and distrust data are not necessarily inversely related and do not add up to 100% as respondents had the option to provide a “No comment” response.

Japan emerged as the most trusted major power in 2020 (61.2%), followed by the EU (38.7%), the US (30.3%), China (16.1%), and India (16%). Tokyo retains its perch on top of the trust totem pole, solidifying its position as one of the region’s preferred strategic partners and a potential source for regional leadership. It remains to be seen if Japan can muster the political will to establish itself as a regional leader, a development that will be welcomed by region as it traverses through a period of strategic uncertainty.

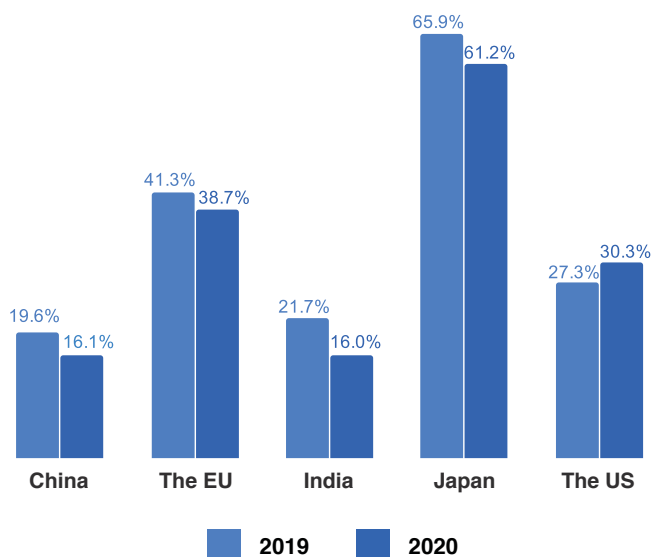
While the EU lags behind Japan in the trust rankings, Europe is held in high regard, especially in championing free trade and in affirming the rules-based order and international law. Notwithstanding its preoccupation with Brexit and other intra-mural concerns, the potential of the EU could be tapped upon to provide much need ballast to keep the region’s tenuous strategic balance on an even keel.

The region has not made any headway to address its trust deficit with China. In fact, the region’s trust in China has deteriorated. As ASEAN acknowledges China as the most influential economic and strategic major power

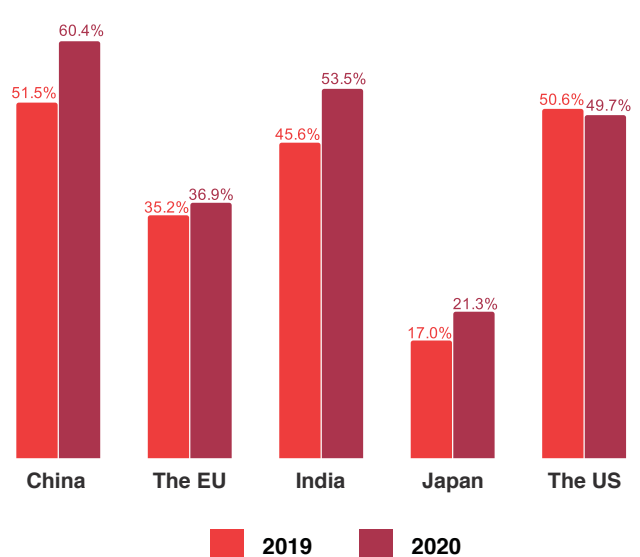
in the region, it also has a sense of heightened concern with China’s growing economic and political clout. The US also suffers from a nagging trust deficit in the region. The underlining factor for the US’ low trust rankings, unlike China, was not borne out of fear or wariness of unbridled power and assertiveness. The region’s “distrust” in the US stems from the perception of Washington’s disregard of the region. Not only has the current US leadership done little to ameliorate this deepening sense of “disappointment,” its haphazard engagement with the region only served to fuel this sense of abandonment.

Nevertheless, the major powers concerned should approach the above findings with caution. When viewed in the context of 2019’s results, nearly all experienced a decrease in trust perception, and an increase in distrust perception. India saw the greatest decline in trust perception among respondents (-5.7%), followed by Japan (-4.7%), China (-3.5%), and the EU (-2.6%). The US was the only power to experience an uptick in trust perception (+3%). This pattern was reflected in the distrust rankings. Perceptions of distrust increased across the board for China (+8.9%), India (+7.9%), Japan (+4.3%), and the EU (+1.7%). Conversely, the US experienced a modest decrease in mistrust (-0.9%). Taken together, the findings suggest that respondents harbour sentiments of uncertainty and slight pessimism towards ASEAN’s relations with the major powers. The results also point to the region’s disappointment at the major powers for failing to lead when regional and global leadership in a wide range of critical concerns like free trade, climate change, and rule of law was in high demand.

Perception of trust among Southeast Asians in the major powers



Perception of distrust among Southeast Asians in the major powers



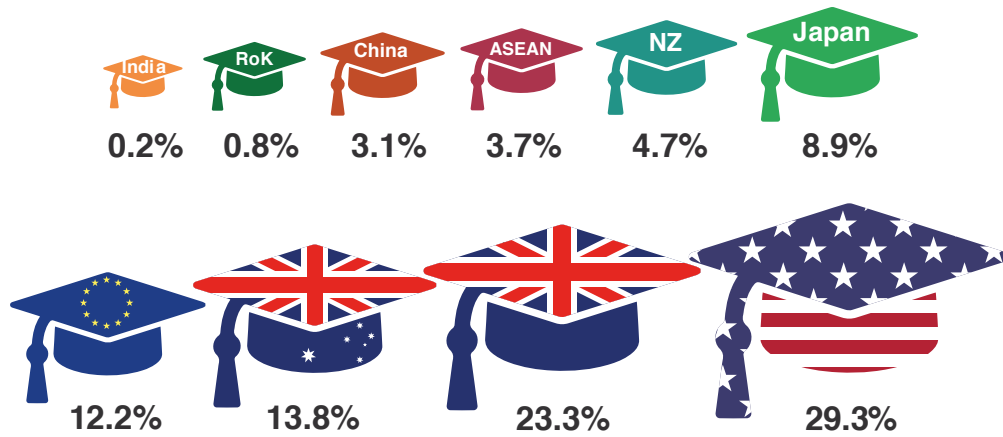
The final section gauges the extent of soft power in the region based on three indicators: preference for tertiary education, favourite destination to visit, and useful foreign language to learn.

Preference for tertiary education

The US is the region's top choice for tertiary education (29.3%), followed by the UK (23.3%) and Australia (13.8%). Rounding up the top five countries for tertiary education are the EU (12.2%) and Japan (8.9%). The US is the most popular destination for tertiary education in six ASEAN member states: Singapore (41%), Vietnam (38.1%), Thailand (36.4%), the Philippines (32.1%), Indonesia (26.3%) and Myanmar (25%). The top choice for Brunei (54.6%) and Malaysia (31.3%) is the UK. Most respondents

from Cambodia (30.8%) prefer Australian universities above all others. Both Australia and the EU share the top choice in Laos (17.4%).

Only 3.7% of the total respondents choose an ASEAN member state as their top choice for tertiary education. Within this group, an overwhelming majority (66.7%) pick Singapore for their study.



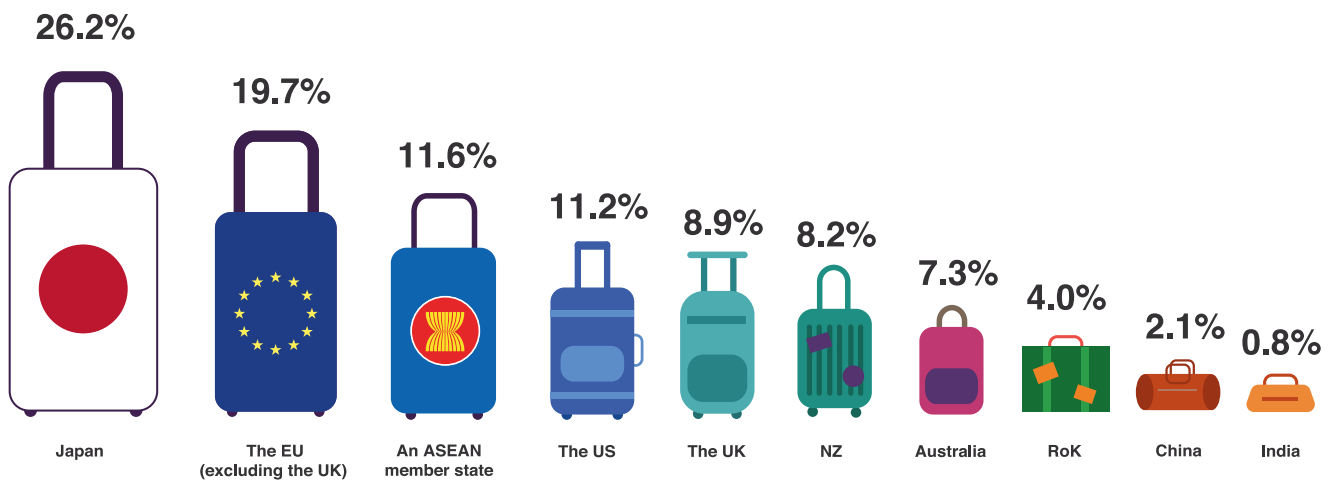
Q56 Which country would be your first choice if you (or your child) were offered a scholarship to a university?

Country	An ASEAN member state	Australia	China	India	EU (excluding the UK)	Japan	Republic of Korea	New Zealand	The UK	The US
ASEAN	3.7%	13.8%	3.1%	0.2%	12.2%	8.9%	0.8%	4.7%	23.3%	29.3%
Brunei	3.1%	12.4%	1.0%	0.0%	7.2%	5.2%	1.0%	5.2%	54.6%	10.3%
Cambodia	0.0%	30.8%	0.0%	0.0%	11.5%	3.9%	0.0%	7.7%	19.2%	26.9%
Indonesia	1.4%	13.5%	0.0%	0.0%	24.3%	6.8%	0.7%	4.0%	23.0%	26.3%
Laos	8.7%	17.4%	13.0%	0.0%	17.4%	13.0%	0.0%	13.0%	4.4%	13.1%
Malaysia	3.7%	14.1%	1.8%	0.0%	5.5%	14.1%	0.6%	7.4%	31.3%	21.5%
Myanmar	3.7%	15.6%	2.1%	0.8%	9.0%	19.7%	1.2%	5.7%	17.2%	25.0%
Philippines	8.8%	20.4%	1.5%	0.0%	13.9%	9.5%	0.7%	5.1%	8.0%	32.1%
Singapore	4.0%	7.2%	8.1%	0.0%	8.6%	0.9%	0.4%	1.8%	28.0%	41.0%
Thailand	3.1%	6.2%	7.3%	0.0%	16.7%	7.3%	2.1%	4.2%	16.7%	36.4%
Vietnam	1.3%	17.1%	0.7%	0.7%	15.8%	3.3%	0.7%	3.3%	19.0%	38.1%

Most preferred country to visit

Japan is the region's most popular destination to visit with more than one in four (26.2%) respondents choosing Japan as their top choice. Japan tops the list of travel destinations in Thailand (39.6%), Singapore (38.7%), the Philippines (24.8%), Malaysia (23.3%) and Myanmar (22.5%). Europe (19.7%) is the second most popular destination, followed by an ASEAN member state (11.6%), the US (11.2%) and the UK (8.9%).

Among the respondents who choose an ASEAN member state as their favourite travel destination, Thailand is the top choice with the share of 29.6%, followed by Singapore (21.1%) and Indonesia (17.8%).

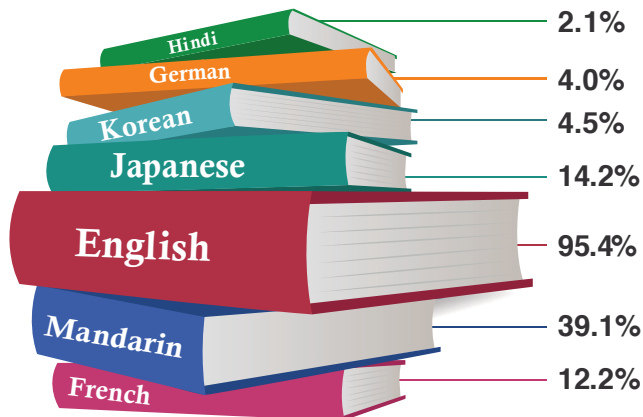


Q57 Which country is your favourite destination to visit?

Country	An ASEAN member state	Australia	China	India	EU (excluding the UK)	Japan	Republic of Korea	New Zealand	The UK	The US
ASEAN	11.6%	7.3%	2.1%	0.8%	19.7%	26.2%	4.0%	8.2%	8.9%	11.2%
Brunei	28.9%	6.2%	1.0%	0.0%	11.3%	14.4%	6.2%	6.2%	17.5%	8.3%
Cambodia	15.4%	19.2%	0.0%	0.0%	38.5%	15.4%	0.0%	3.8%	0.0%	7.7%
Indonesia	7.4%	3.4%	0.7%	0.7%	33.8%	27.0%	4.7%	8.1%	5.4%	8.8%
Laos	13.0%	0.0%	13.0%	0.0%	34.8%	21.7%	4.4%	8.7%	4.4%	0.0%
Malaysia	10.4%	11.7%	1.8%	0.6%	14.1%	23.3%	3.1%	16.0%	9.8%	9.2%
Myanmar	9.5%	8.6%	1.2%	0.4%	20.1%	22.5%	4.5%	8.6%	9.8%	14.8%
Philippines	16.0%	9.5%	0.7%	0.7%	19.7%	24.8%	6.6%	4.4%	8.8%	8.8%
Singapore	13.5%	7.7%	2.3%	0.9%	11.7%	38.7%	2.7%	8.1%	7.7%	6.7%
Thailand	8.3%	3.2%	3.2%	1.0%	20.8%	39.6%	1.0%	7.3%	5.2%	10.4%
Vietnam	4.0%	4.6%	4.6%	2.6%	21.7%	19.1%	4.0%	5.2%	11.2%	23.0%

Most useful foreign language to learn

The three most useful and beneficial foreign languages identified by the respondents are English (95.4%), Mandarin (39.1%) and Japanese (14.2%) – the same results as in the 2019 survey.



Hello

여보세요

नमस्कार

Hallo

こんにちは

你好

Bonjour

Q58 Which foreign language(s) is/are the most useful and beneficial for your work and professional development?
(check those that apply)

Country	English	French	German	Hindi	Japanese	Korean	Mandarin
ASEAN	95.4%	12.2%	4.0%	2.1%	14.2%	4.5%	39.1%
Brunei	93.8%	17.5%	2.1%	2.1%	10.3%	5.2%	44.3%
Cambodia	96.2%	15.4%	3.8%	0.0%	11.5%	3.8%	23.1%
Indonesia	98.7%	20.9%	7.4%	1.3%	14.9%	3.4%	38.5%
Laos	95.7%	4.4%	0.0%	0.0%	8.7%	0.0%	21.7%
Malaysia	92.0%	19.7%	4.3%	3.1%	17.8%	6.1%	49.7%
Myanmar	100.0%	7.0%	0.8%	1.6%	12.7%	4.5%	18.0%
Philippines	97.1%	8.0%	5.1%	0.7%	15.3%	5.1%	24.1%
Singapore	87.4%	11.3%	6.3%	4.5%	18.5%	5.4%	73.4%
Thailand	96.9%	7.3%	5.2%	3.1%	13.5%	2.1%	40.6%
Vietnam	98.7%	9.9%	2.6%	0.7%	9.2%	4.0%	26.3%

Thank you

We would like to extend our sincere thanks to all the respondents for taking the time to complete this survey. Your participation lends an indispensable voice to the opinions and perspectives of Southeast Asians, and allows the region to be heard and be involved in the discussion as an ASEAN collective. The process, which brought together over a thousand ASEAN nationals across five professions, is an exercise in ASEAN collaboration and a demonstration of a Community at work. ✨



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