

SOUTHEAST ASIA
CLIMATE OUTLOOK

2022 SURVEY REPORT

The Southeast Asia Climate Outlook: 2022 Survey Report
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If you have any comments or enquiries about the survey,
please email us at climatechange@iseas.edu.sg

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

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

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

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(Singapore: ISEAS - Yusof Ishak Institute, 2022)

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ABOUT THE SURVEY

Southeast Asia is one of the hardest hit regions by climate change. In 2015, the Asian Development Bank forecasted that climate change could slash 11 per cent off the region's total GDP by the end of the century under a business-as-usual scenario. Taking heed of this prediction, the Climate Change in Southeast Asia Programme at the ISEAS - Yusof Ishak Institute initiated a regional climate survey to obtain a sense of prevailing attitudes and concerns of Southeast Asians towards climate change.

Since 2020, the *Southeast Asia Climate Outlook Survey Report* has been the region's barometer providing insights for policymakers, businesses, and stakeholders in their efforts in advancing green transition in the region. Conducted annually, this survey is designed to analyse the attitudes and concerns of Southeast Asian citizens towards climate change, governmental policies and actions and the role of different stakeholders in climate action.

The Survey is divided into five sections. **Section I** presents the profile of the respondents including nationality, resident city, age, gender, education, affiliation and source of climate information.

Section II explores the views of respondents towards climate change. **Section III** delves into different stakeholder roles in climate action, burden of costs, adequacy of government action, and stance of political parties towards climate change. **Section IV** examines the issues of energy transition and decarbonisation, and food security threats. The **final section** concludes with perceptions of global climate leadership and regional climate cooperation.

At the time of publication, the war in Ukraine, disruptions in commodity markets and supply chains together with the threat of sustained inflationary pressures continue to complicate the global economic recovery from Covid-19. Southeast Asia is not immune to these difficulties. Balancing growth and sustainability needs have become increasingly complex for the governments in the region. There is a risk of returning to unsustainable practices of fossil fuel exploitation to mitigate energy shortages and global price hikes. Nevertheless, this survey indicates that Southeast Asians are increasingly aware of climate risks, demand more progressive actions, and have a high confidence in the future of green transformation in the region.

METHODOLOGY

The Survey was conducted online over a period of five weeks from **8 June to 12 July 2022**. The survey comprised 38 questions in total and required a median of **12.5 minutes** to complete. A total of 1,386 Southeast Asian respondents from ten ASEAN member states completed the online survey which drew from **seven categories of affiliation**: (1) Academia, Think-tanks and Research institutions, (2) Business, Finance and Industry, (3) Government, (4) Regional organisations, inter-government and international organisations, (5) Civil society and non-government organisations (6) Media and (7) Students, Retirees and Others. The survey was offered in English and translated into **six languages** - Bahasa Indonesia, Burmese, Lao, Khmer, Thai and Vietnamese.

The Survey was conducted both online and offline via a mixed sampling method. 961 self-identified Southeast Asian respondents were polled online while 425 were polled using Computer-Assisted Personal Interview (CAPI) methods in Brunei, Cambodia, Laos and Myanmar. We applied a strict set of criteria during the data cleaning process to maintain data quality and integrity.

The final analysis of the data was conducted on **1,386 completed responses**. The results of the survey are meant to present a general view of climate attitudes in the region and are not predictive of future events.

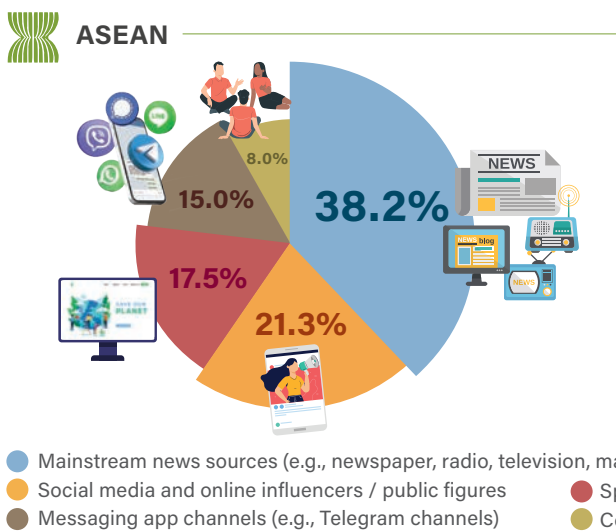


HIGHLIGHTS AT A GLANCE

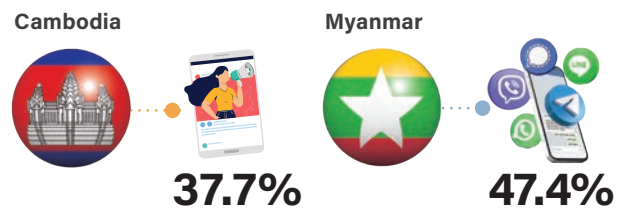
01 SOURCE OF CLIMATE NEWS

The largest proportion of respondents (38.2%) get news and information about climate change from mainstream sources (e.g. newspaper, radio, television, and major online news site), social media and online influences (21.3%), and specialised news sites covering climate change and environment (17.5%).

Which is your main source of news and information about climate change issues?



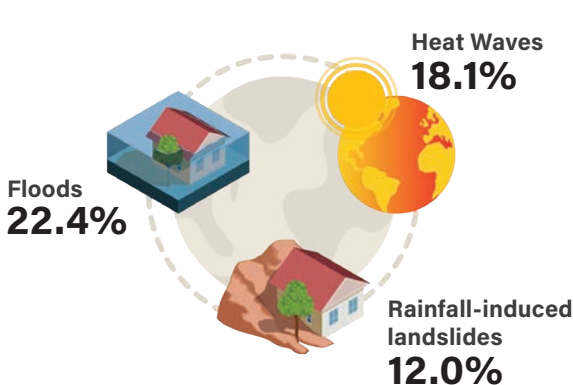
The largest proportion of respondents from Cambodia (37.7%) rely on social media and online influencers while a significant proportion of respondents from Myanmar (47.4%) depend on messaging app channels (e.g. Telegram).



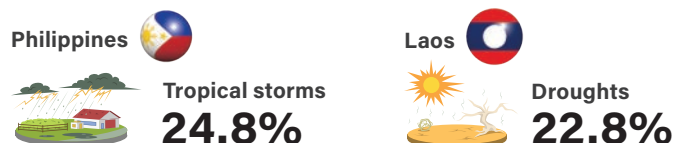
02 MOST SERIOUS CLIMATE IMPACTS

The region's top three most serious climate change impacts are floods, heat waves, and rainfall-induced landslides. These were the top choices for 8 out of 10 countries.

In your view, what are the three most serious climate change impacts that your country is currently exposed to? (Select three choices)



The majority of respondents from Laos (22.8%) are most concerned about droughts. Meanwhile respondents from the Philippines (24.8%) are most worried about tropical storms, including hurricanes, cyclones or typhoons. The stark differences in country perceptions of threat confirm that climate change impacts do not uniformly affect any region or country.

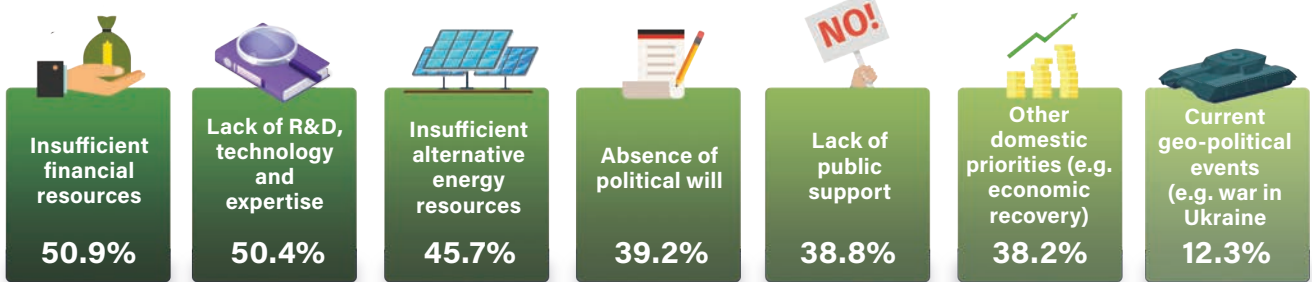


03

DECARBONISATION CHALLENGES

ASEAN respondents believe that insufficient financial resources (50.9%), lack of research and development, technology and expertise (50.4%), and insufficient alternative resources (45.7%) are the top three biggest obstacles to decarbonisation in their countries. The majority of those from academia, think-tanks, and research institutions (55.3%), however, think that the absence of political will is the most critical challenge.

The biggest obstacle to decarbonisation in my country is... (choose up to three options)

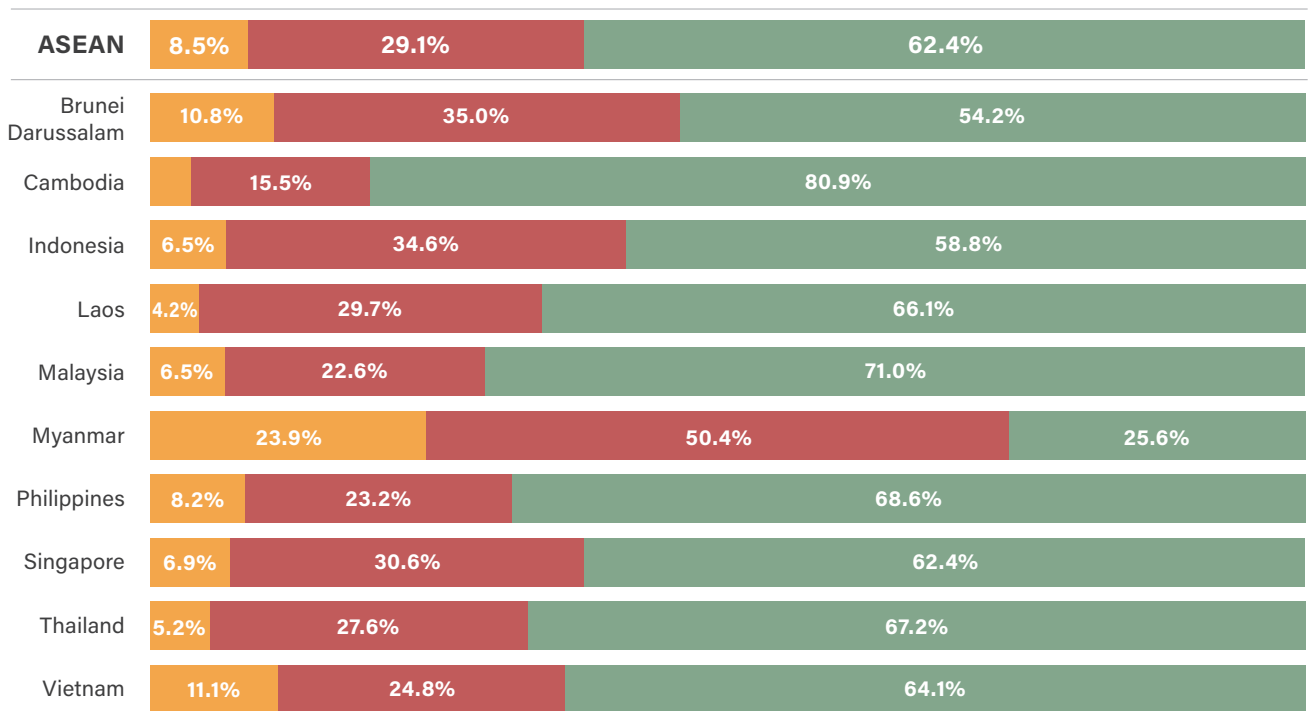


04

COAL PHASE-OUT

Majority of ASEAN respondents (62.4%) believe that regional countries should stop building new coal power plants immediately. However, support for eliminating new coal power plants is weaker in Myanmar (25.6%), Brunei (54.2%), and Indonesia (58.8%).

“ASEAN countries should stop building new coal power plants immediately.” Do you agree?



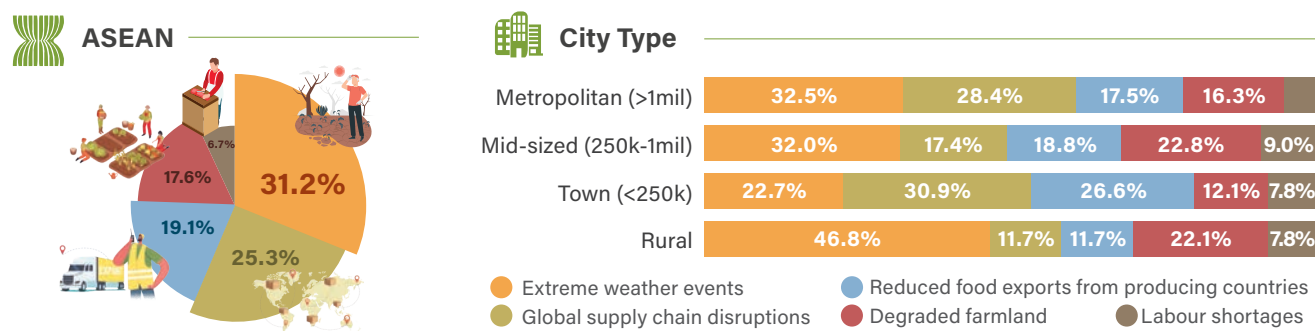
Disagree Unsure Agree

05

FOOD SECURITY

The largest proportion of respondents think that extreme weather events (31.2%) are the main cause of food supply disruptions in their countries. The second top-cited reason points to global supply chain disruptions (25.3%) followed by reduced food exports from producer countries (19.1%). Those living in rural areas express stronger agreement about the threat of extreme weather events (46.8%) followed by degraded farmland (22.1%) as their second-ranked reason.

“My country’s food supply is mainly threatened by...”

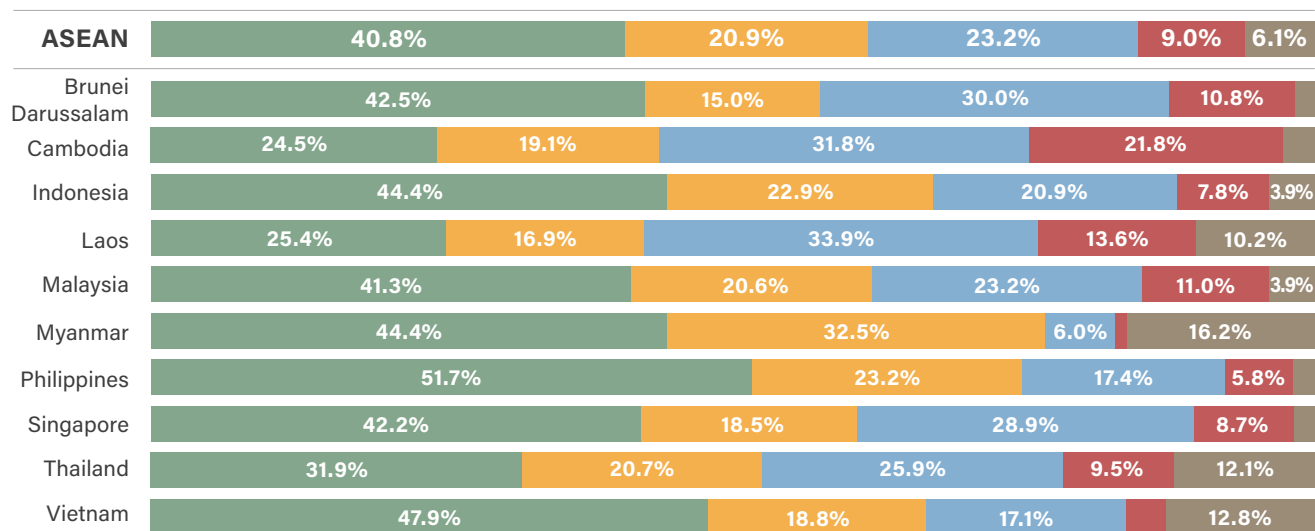


06

COUNTRY’S ROLE IN INTERNATIONAL CLIMATE ACTION

The largest proportion of respondents (40.8%) agree that their countries contribute to climate change and need to step up efforts to help the world to decarbonise. Majority of respondents from the Philippines share this view (51.7%). On the opposite end of the spectrum, 16.2% of Myanmar respondents believe that their country did not cause climate change and therefore need not demonstrate climate action in international fora.

Which statement best reflects your views about your country’s role in international climate action?



- My country contributes to climate change and needs to step up efforts to help the world to decarbonise
- My country feels the impact of climate change, major emitters such as the US, China, and Europe must be responsible
- My country did not cause climate change but needs to play a more active role in the global green transition because it concerns our future
- My country did not cause climate change but to help decarbonise, we need international assistance
- My country did not cause climate change and need not demonstrate climate action in international fora

07

POTENTIAL CLIMATE LEADER IN THE REGION

Majority of ASEAN respondents (53.0%) think that Singapore has the potential to be the region’s climate leader followed by 11.1% who think that Indonesia can fulfil this role. Overwhelming proportion (81.8%) of Cambodia respondents choose Singapore. Meanwhile, 52.9% of Indonesia respondents think that their country has the potential to be the region’s climate leader.

Which ASEAN country has potential to be the region’s climate leader? (Top 3)



Singapore
53.0%



Indonesia
11.1%



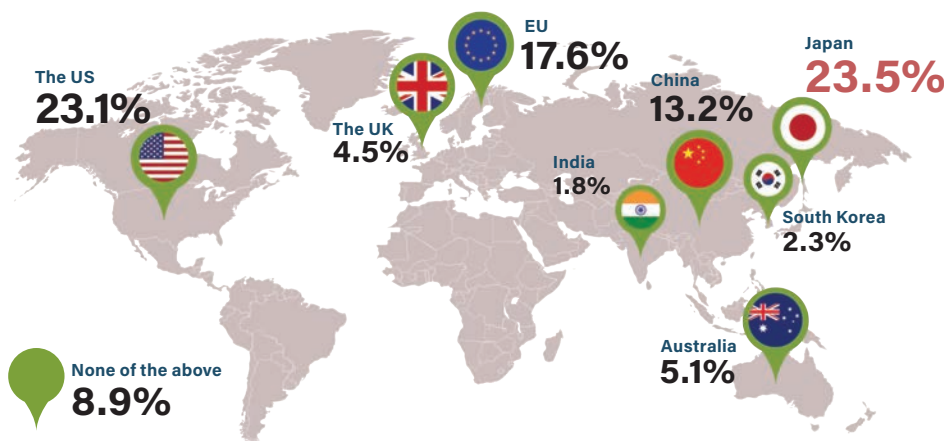
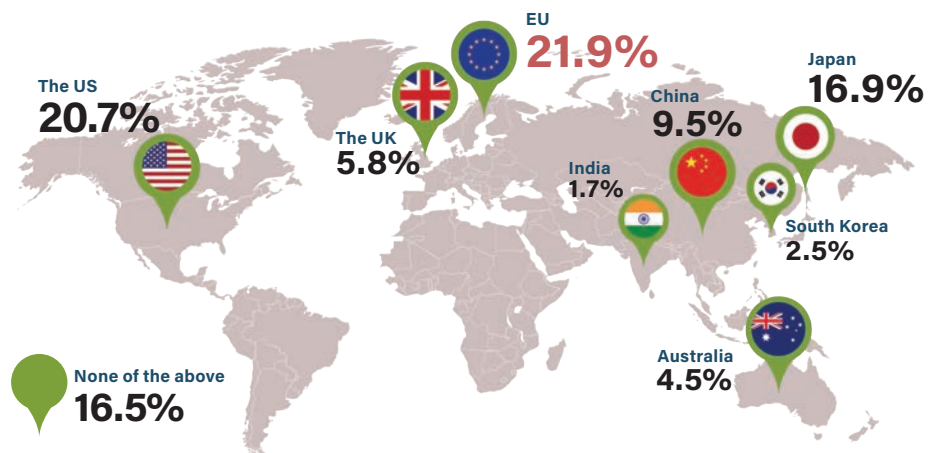
None of the above
8.8%

08

INTERNATIONAL CLIMATE LEADERSHIP AND ASSISTANCE

The largest proportion of respondents (21.9%) think that the European Union (EU) has demonstrated climate leadership to help the world achieve the Paris-aligned goals. However, instead of the EU, respondents prefer to see Japan (23.5%) step up and play a more proactive role in sharing their climate expertise, practical ability, and technical know-how in their country.

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



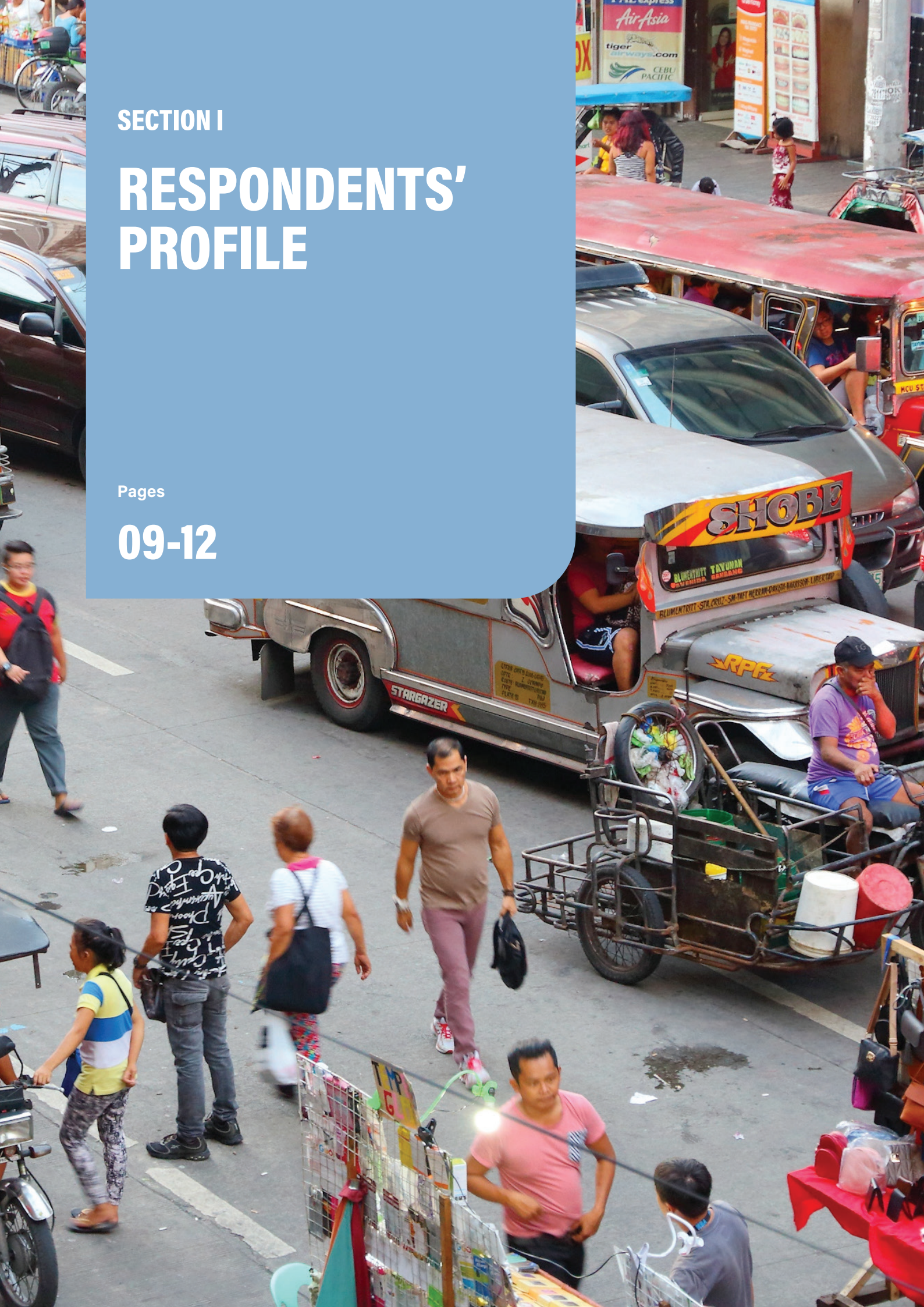
Who could play a more proactive role in sharing their climate expertise, practical ability, and technical know-how in your country?

SECTION I

RESPONDENTS' PROFILE

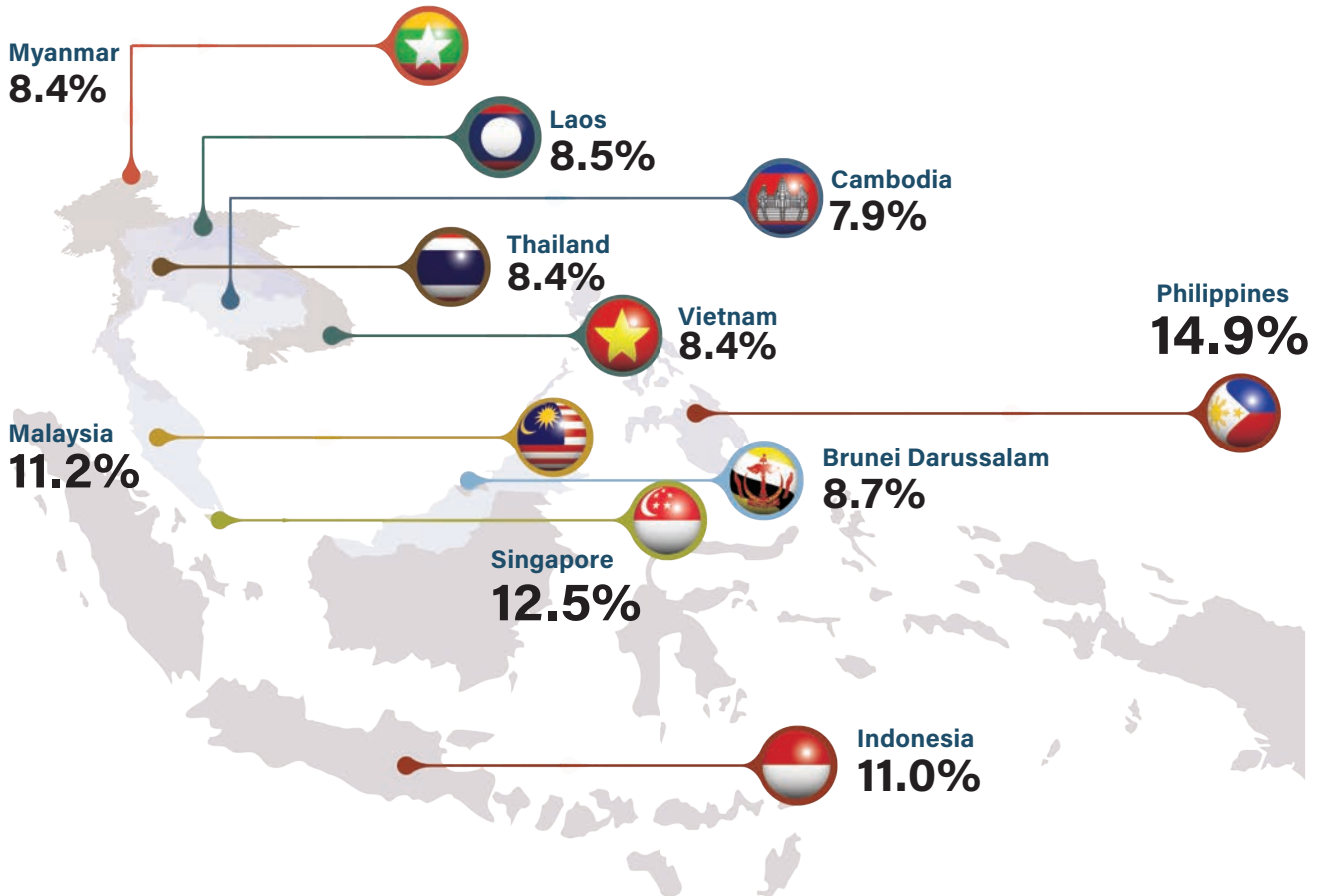
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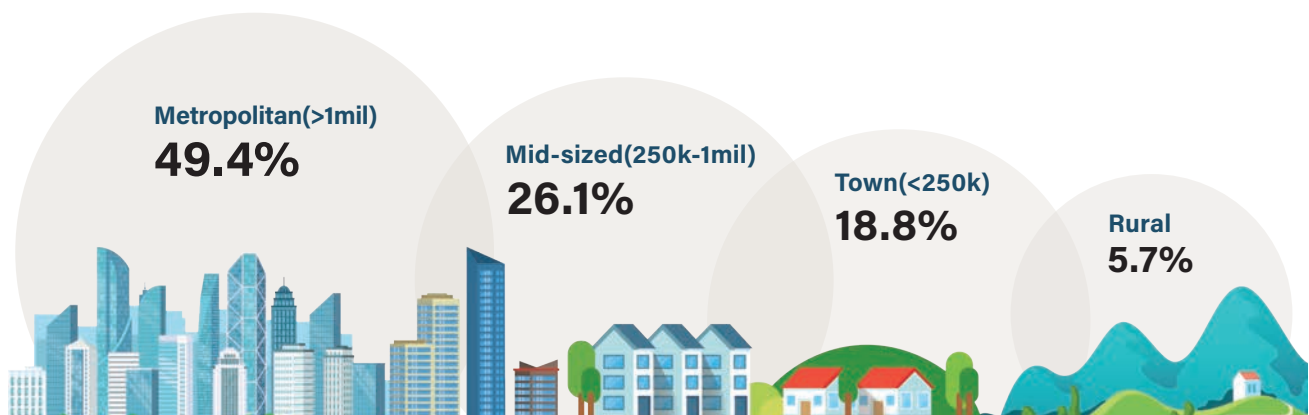
01 Nationality

The Philippines led with the highest number of respondents (14.9%), followed closely by Singapore (12.5%), Malaysia (11.2%), and Indonesia (11.0%). The rest of the countries are Brunei Darussalam (8.7%), Laos (8.5%), Myanmar (8.4%), Thailand (8.4%), Vietnam (8.4%), and Cambodia (7.9%).



02 Type of City

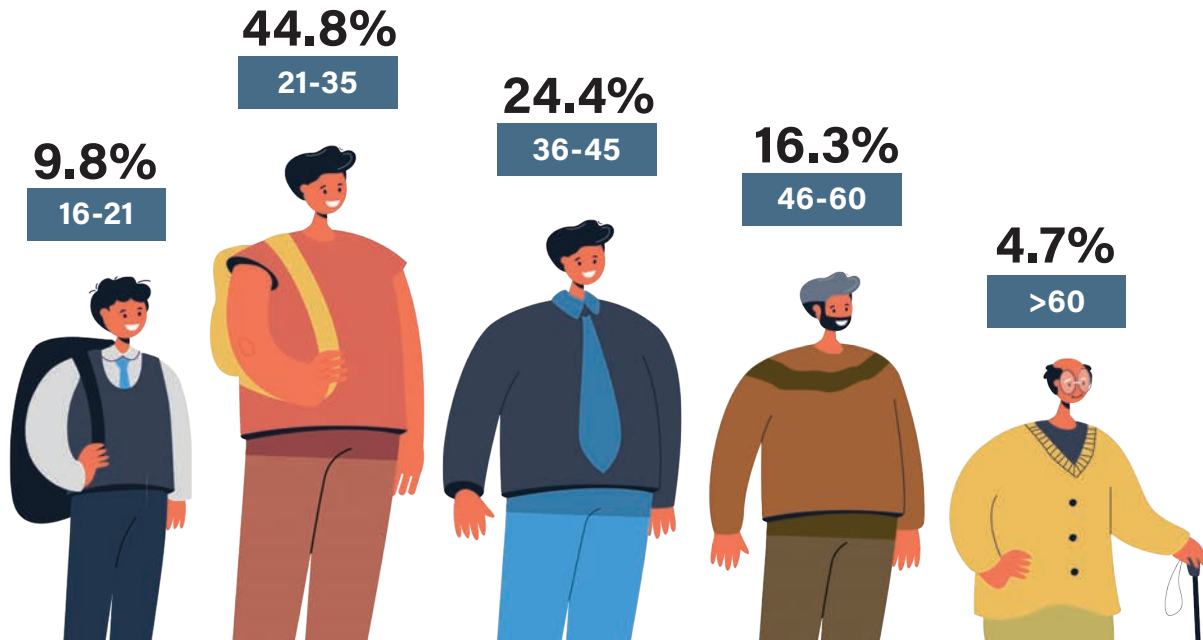
Majority of respondents currently reside in Southeast Asia (98.2%). The rest (1.8%) are Southeast Asians who reside outside the region but are allowed to take the survey. Among those residing in the region, the majority live in metropolitan cities (49.4%) with a population of over 1 million, followed by mid-sized cities (26.1%) of 250,000 – 1 million, and towns (18.8%) with a population lower than 250,000. A small proportion (5.7%) state that they do not reside in cities¹. In this report, this group is labelled as "Rural" respondents.



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

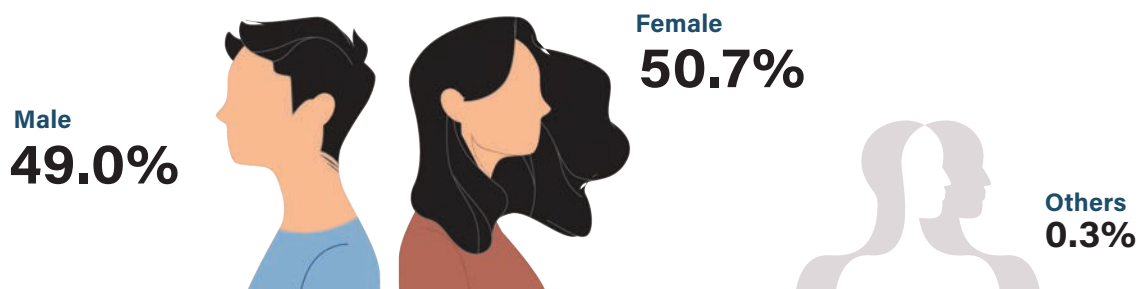
03 Age group

Among the five age groups surveyed, the largest group of respondents were youth aged 21-35 years old (44.8%), followed by respondents aged 36-45 (24.4%), 46-60 (16.3%), 16-21 (9.8%), and above 60 (4.7%).



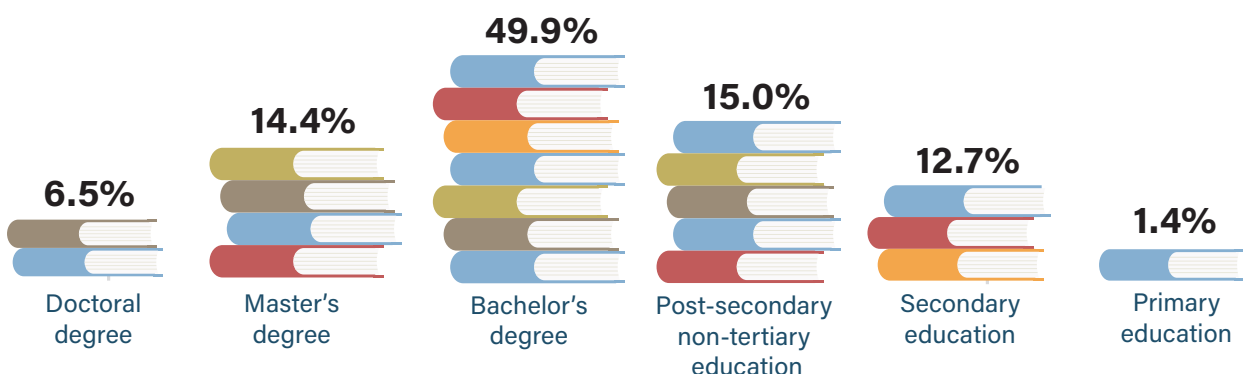
04 Gender

The respondents were almost evenly divided between female (50.7%) and male (49.0%). 0.3% of the respondents identified themselves as "Others".



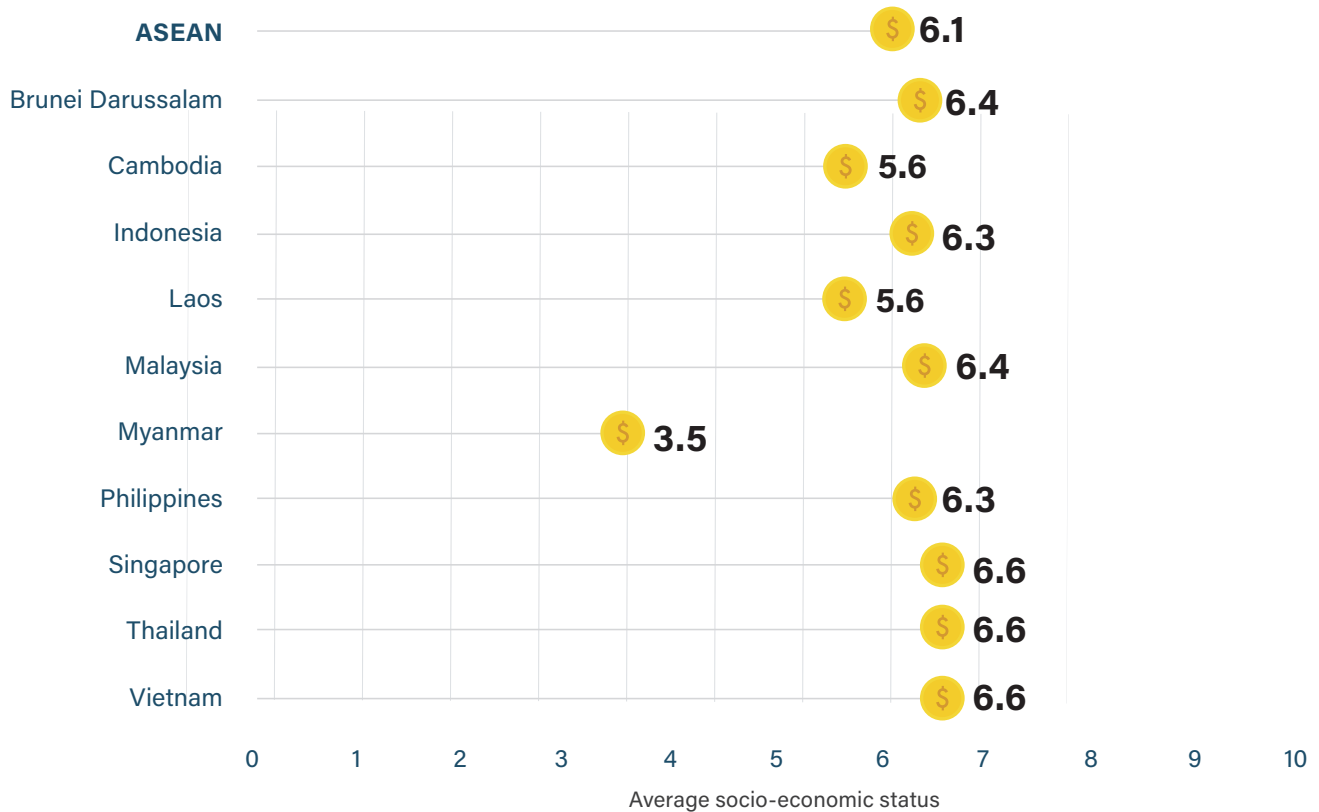
05 Education

Majority of respondents (70.8%) have completed or are completing a Bachelor's degree or higher. Among this group, Bachelor's degree or equivalent holders were the most represented (49.9%). Those with primary education were the least represented (1.4%). Respondents with primary and secondary-level education are treated as one category in the subsequent analysis.



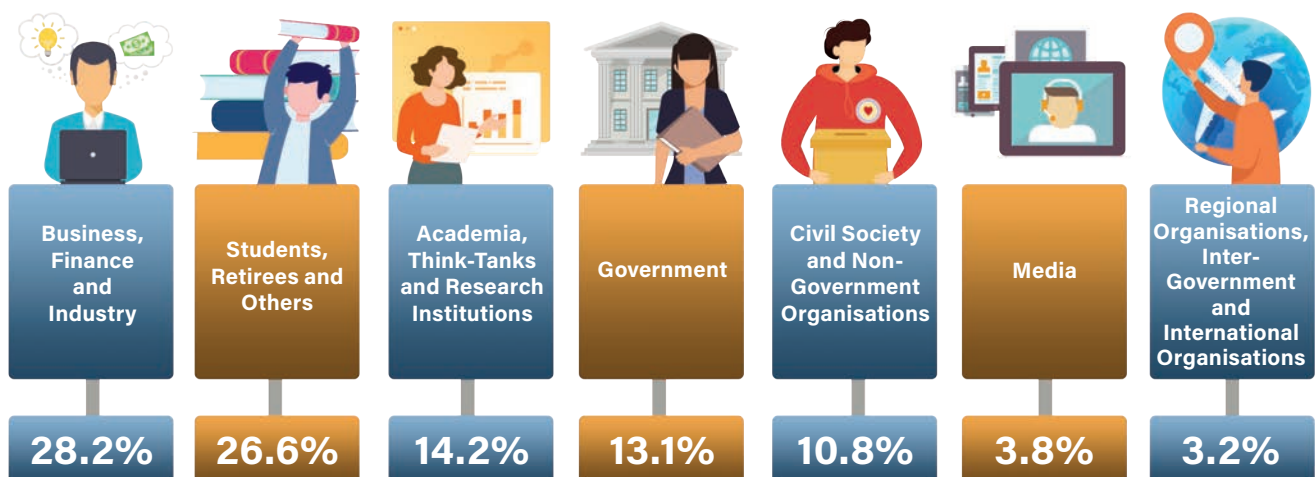
06 Socio-Economic Status

Based on the concept of Subjective Social Status, respondents were asked to self-identify their socio-economic status on a scale of 0 to 10, where 10 represents the highest socio-economic status within their own country. On average, respondents rated themselves at 6.1. The level of confidence is highest in Singapore, Thailand, and Vietnam at 6.6; followed by Brunei Darussalam and Malaysia at 6.4; Indonesia and the Philippines at 6.3; and Laos and Cambodia at 5.6 respectively. Myanmar respondents feel worst off at 3.5.



07 Affiliation

The largest group of the respondents are affiliated with business, finance, and industry (28.2%) followed by students, retirees and others without affiliation (26.6%), academics and think-tankers (14.2%), government (13.1%), civil society and non-governmental organisations (10.8%), media persons (3.8%) and regional or international civil servants (3.2%).



08 Top source of climate change news²

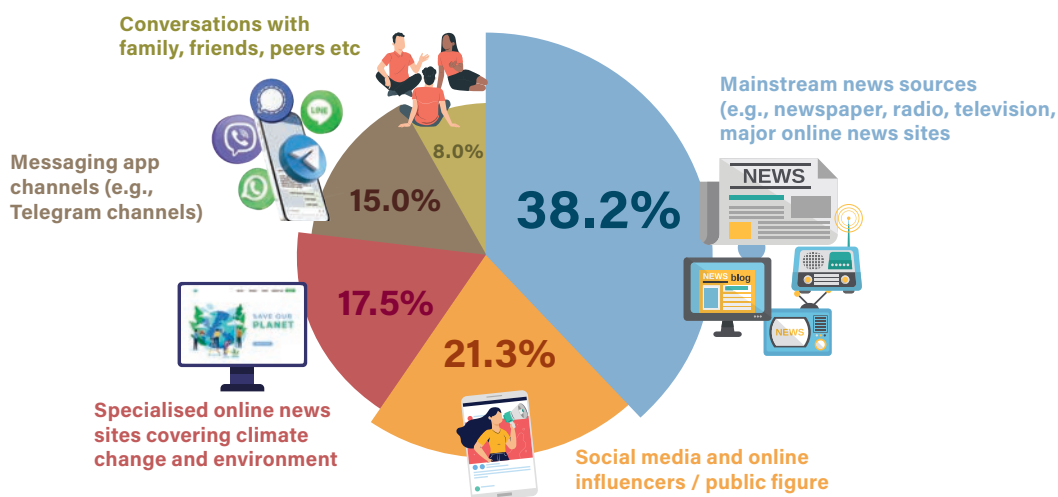
Largest proportion of respondents (38.2%) depend on mainstream news sources such as newspaper, radio, television, and major online news sites to get information about climate change issues. This source is most heavily depended on in Myanmar (49.1%), Laos (44.9%), Malaysia (40.0%), Singapore (39.6%), Brunei Darussalam (39.2%), and the Philippines (38.4%).

A significant proportion of regional respondents (21.3%) rely on social media and online influencers or public figures as a source of climate information. 37.7% of respondents in Cambodia depend on this source for their climate news.

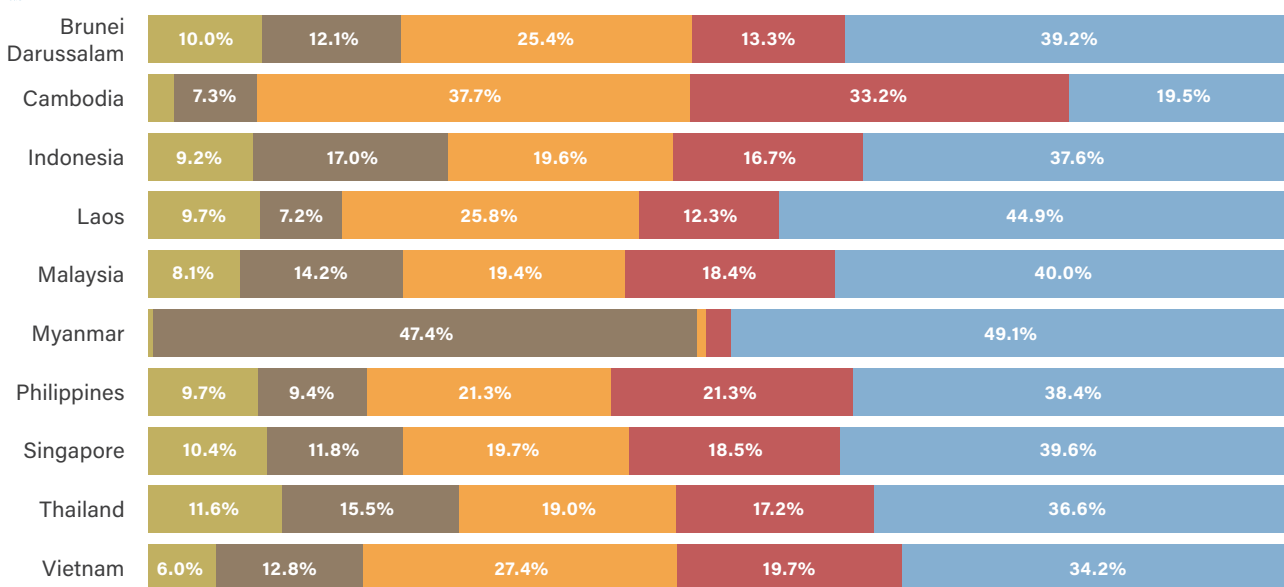
Interestingly, an almost equal proportion of respondents from Myanmar depend on messaging app channels such as Telegram, WhatsApp, Signal as those who depend on mainstream news source of climate information.



ASEAN



Nationality



- Mainstream news sources (e.g., newspaper, radio, television, major online news sites)
- Social media and online influencers / public figure
- Specialised online news sites covering climate change and environment
- Messaging app channels (e.g., Telegram channels)
- Conversations with family, friends, peers etc

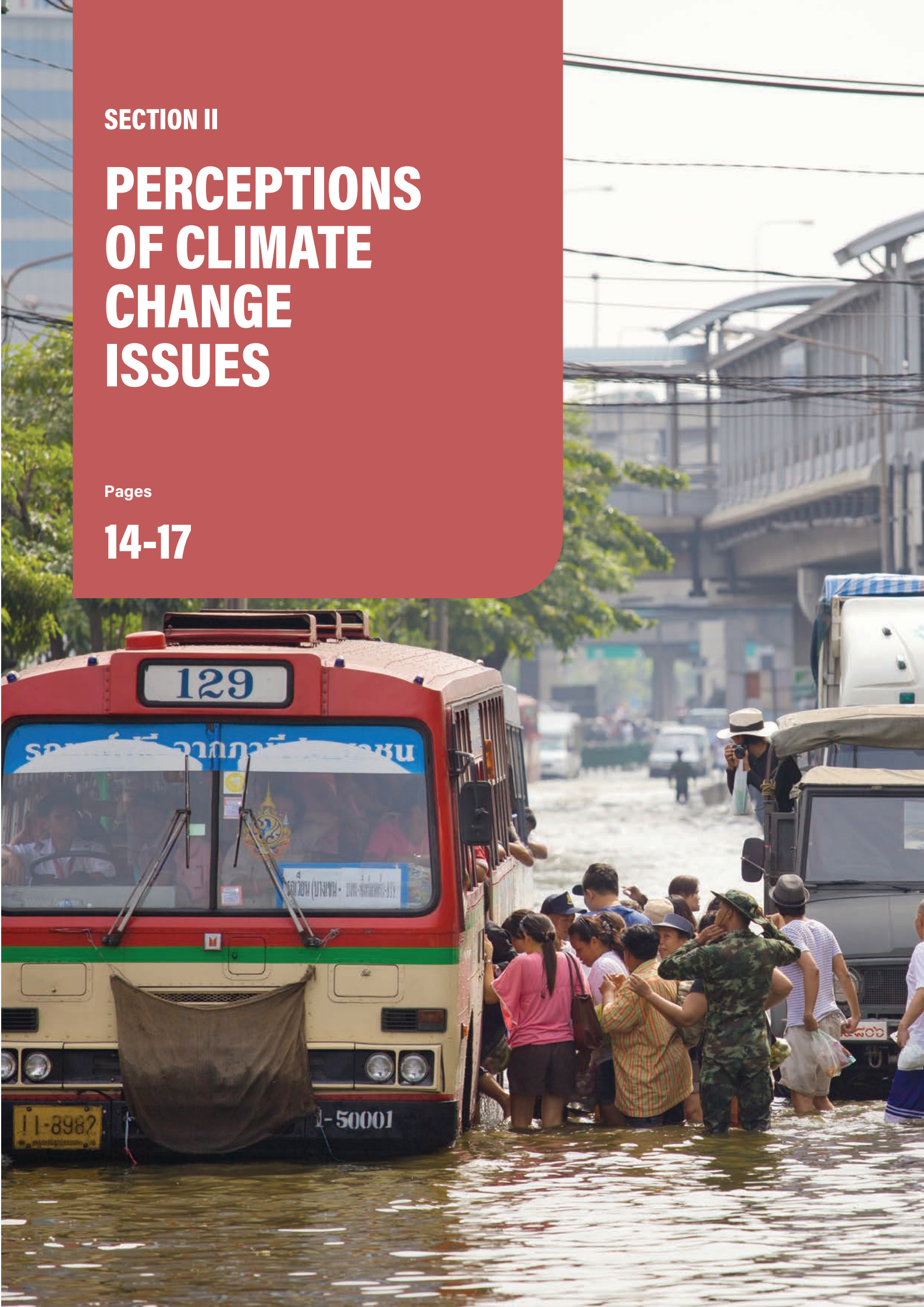
² In this question, all respondents selected two choices. For consistency, results were scaled to 100%.

SECTION II

PERCEPTIONS OF CLIMATE CHANGE ISSUES

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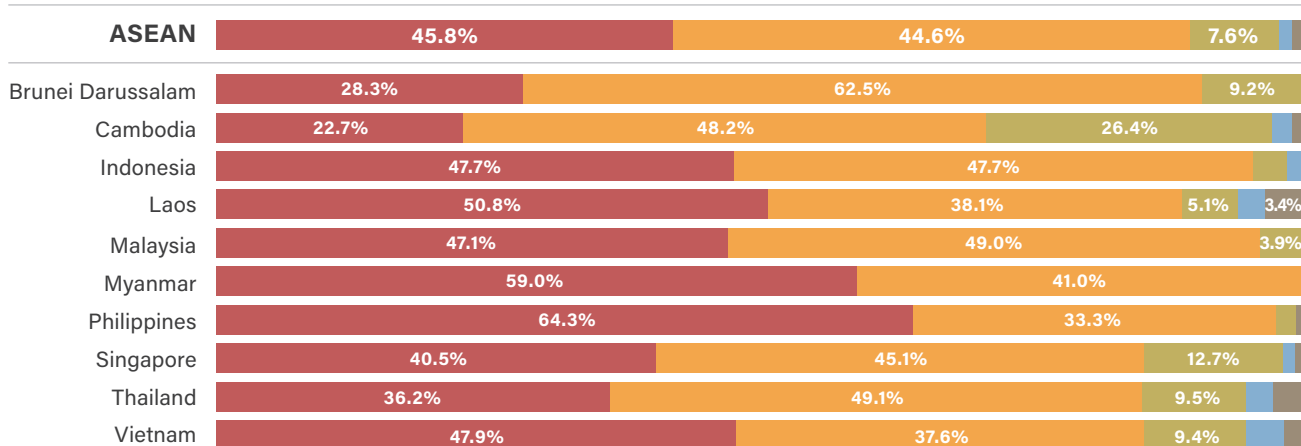


09 What is your view of climate change?

90.4% of respondents expressed deep concerns about climate change. Respondents from the Philippines are found to have the strongest sense of urgency in addressing the climate threat, with over 64.3% believing that climate change posed a “serious and immediate threat to the well-being of [their] country.” Cambodia, on the other hand, claims the largest proportion of responses against the urgency of climate change, with 26.4% perceiving climate change as a “long-term threat and will not impact [them] in their lifetime.”



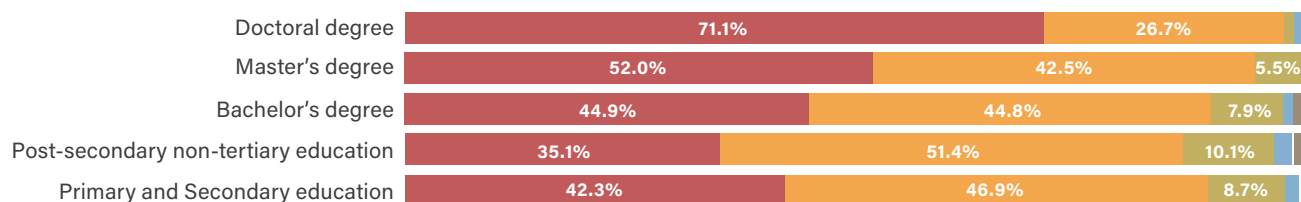
Nationality



Responses that suggest a concern about climate change generally increase with levels of educational attainment – the top three being those with Doctoral Degrees (97.8%), Master’s Degrees (94.5%), and Bachelor’s Degrees (89.7%).



Education

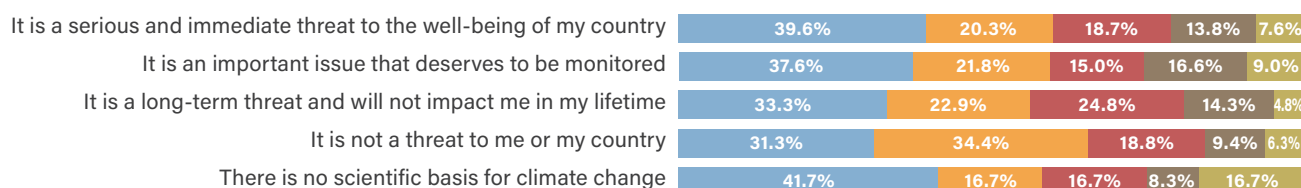


- It is a serious and immediate threat to the well-being of my country
- It is an important issue that deserves to be monitored
- It is a long-term threat and will not impact me in my lifetime
- It is not a threat to me or my country
- There is no scientific basis for climate change

Respondents who perceive climate change as without scientific basis are more likely to depend on conversations with family and friends (16.7%) than other groups, in addition to mainstream news sources (41.7%). Those who do not find climate change a threat to their country rely on social media, online influencers, and public figures as their main source of information (34.4%).



Top Source of Climate News

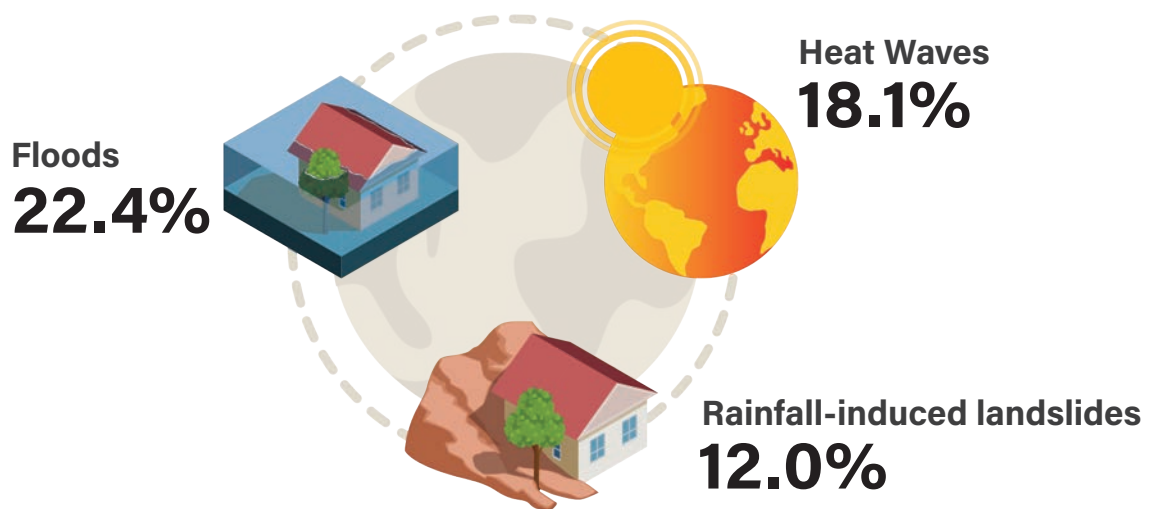


- Mainstream news sources (e.g., newspaper, radio, television, major online news sites)
- Social media and online influencers / public figure
- Specialised online news sites covering climate change and environment
- Messaging app channels (e.g., Telegram channels)
- Conversations with family, friends, peers etc

10 In your view, what are the three most serious climate change impacts that your country is currently exposed to? (Select three choices³)

Southeast Asian respondents' choice of top climate change impact remained floods (22.4%), followed by heat waves (18.1%), and rainfall-induced landslides (12.0%). In 2021, the region's most serious climate change impacts were floods, loss of biodiversity and sea-level rise.

At the country level, floods were Cambodia and Malaysia's top-ranked impact at 32.7% and 28.0% respectively. Cambodia's Tonle Sap flood plains, the country's economic lifeline, suffers from heavy flooding on an annual basis with an estimation of 729 deaths caused by flooding between 2005 and 2020 (Chakrya, 2022). The floods in several Malaysian states in December 2021 and January 2022 are also a major concern with estimated losses totalling USD1.46 billion and a toll of 54 deaths (Rashvinjeet, 2022). Heat waves were Myanmar's biggest problem (29.1%) whereas rainfall-induced landslides continued to worry Malaysia (20.6%).



Climate impacts, however, vary depending on the type of city each respondent may reside in. For respondents living in rural areas, droughts are one of the top three climate impacts (21.5%). Mid-sized cities perceive tropical storms to be part of their top three (17.9%), while those in metropolitan cities emphasise sea level rise (15.0%). Towns remain largely consistent with the general average.

City Type

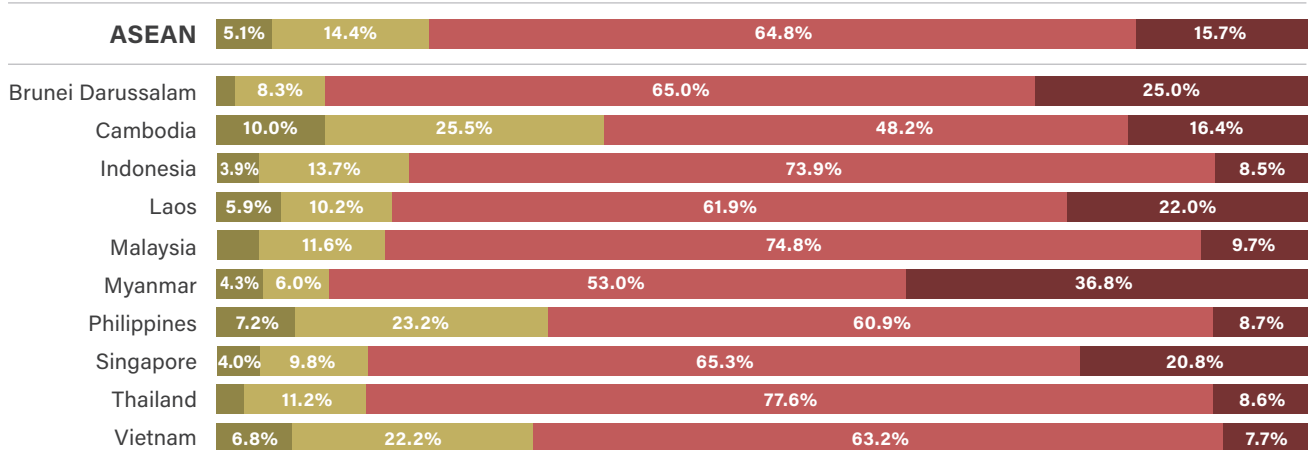
	Floods	Heat waves	Rainfall induced landslides	Sea level rise	Droughts	Tropical storms	Loss of biodiversity	Ocean acidification
Metropolitan (>1mil)	23.0%	18.0%	11.0%	15.0%	11.1%	8.7%	10.7%	2.5%
Mid-size (250k-1mil)	17.9%	18.7%	14.3%	7.2%	10.0%	17.9%	11.8%	2.1%
Town (<250k)	25.1%	18.8%	13.0%	9.9%	11.0%	9.3%	10.6%	2.3%
Rural	29.4%	14.5%	5.7%	7.0%	21.5%	9.6%	11.8%	0.4%

³In this question, all respondents selected three choices. For consistency, results were scaled to 100%. Forty-three respondents indicated "My country is not exposed to climate change impacts" and were excluded from this dataset.

11 Which statement below best describes your level of participation in climate advocacy?

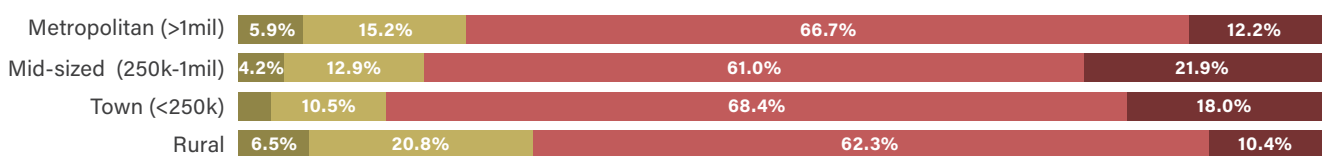
Majority of respondents across ASEAN participate in climate change advocacy primarily by following news and sharing information (64.8%). A slightly larger proportion of Cambodian respondents take on a more proactive role, either through joining climate groups and attending seminars, or leading and mobilising climate projects (35.5%). Myanmar hosts the largest proportion of respondents who do not participate in, nor follow, climate-related issues (36.8%).

Nationality

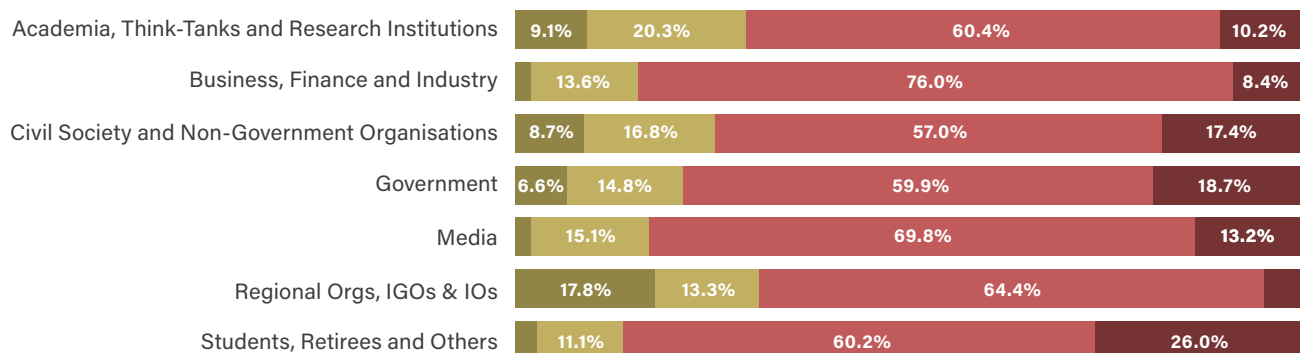


Respondents living in rural areas and metropolitan cities are two largest groups that take on more proactive roles, at 27.3% and 21.1%, respectively. Respondents from media form the largest proportion of those who follow news and share information about climate change (69.8%), while those in regional organisations, intergovernmental and international organisations are most active in leading projects and mobilising support (17.8%) due largely to their occupation. A large proportion of students, retirees, and others do not participate in any form of climate advocacy (26.0%).

City Type



Affiliation



- I lead a project and mobilise support on climate change awareness
- I join climate movement groups and attend seminars on environment-related issues
- I follow news and share information about climate change
- I don't participate in and follow climate change issues

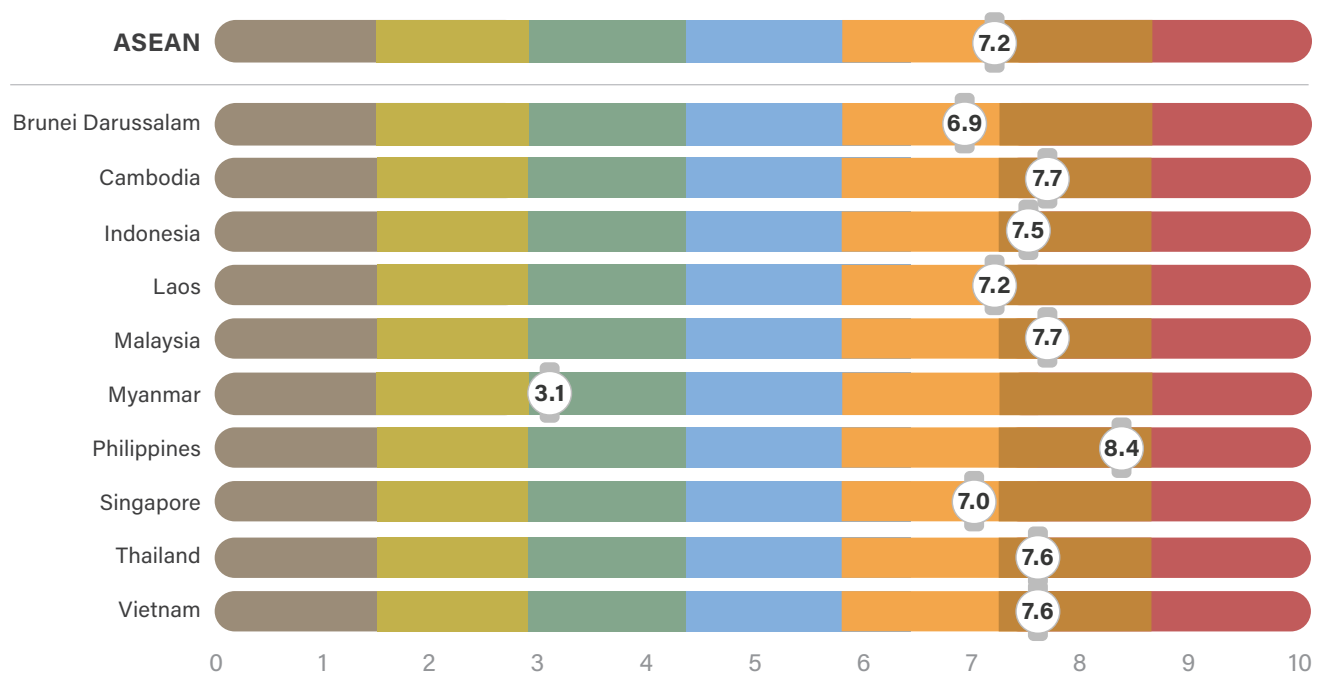
12 On a scale of 0-10, to what extent do you think climate change impacts will negatively affect your life in 10 years' time?

On a scale of 0-10, Southeast Asians rank the likelihood of climate impacts negatively affecting their lives at 7.2. Only Myanmar consists of a majority of respondents who rank their likelihood as low (3.1). Philippine respondents average the highest in perception of likelihood at 8.4: this remains consistent with Q09 ("What is your view of climate change?"), where those from the Philippines are found to have the strongest sense of urgency in addressing the climate threat.

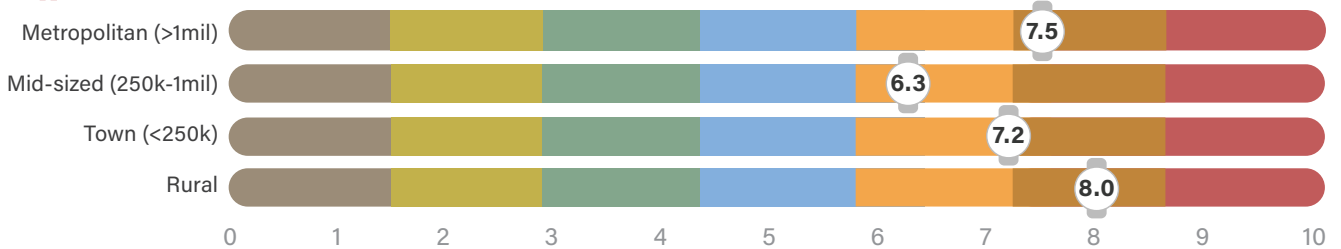
Respondents from rural areas ranked the highest among all city types at an average 8.0 on a scale of 0-10. Results also show that the higher the socio-economic status of a respondent, the higher their average ranking in the likelihood of climate impacts negatively affecting their lives.



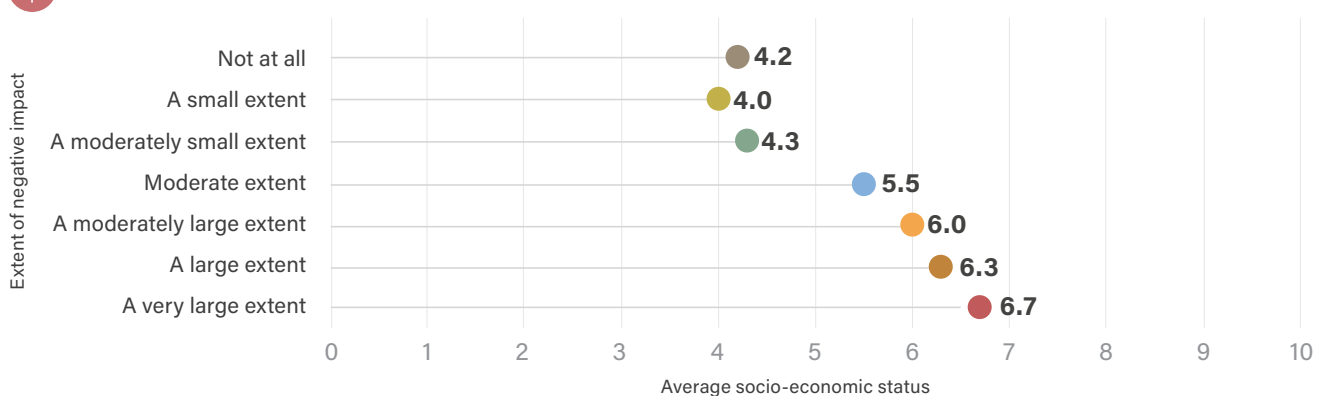
Nationality



City Type



Socio-Economic Status

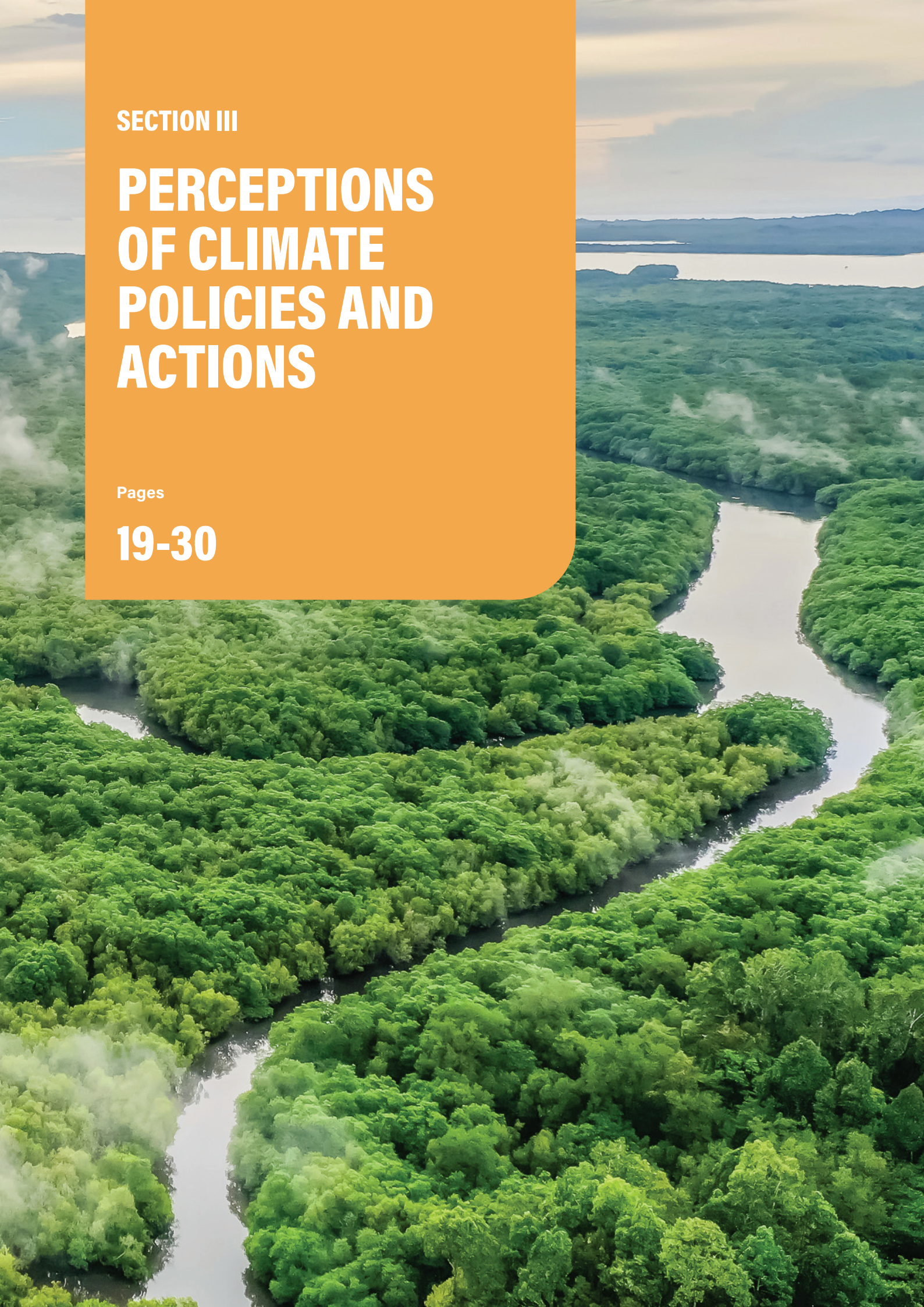


SECTION III

PERCEPTIONS OF CLIMATE POLICIES AND ACTIONS

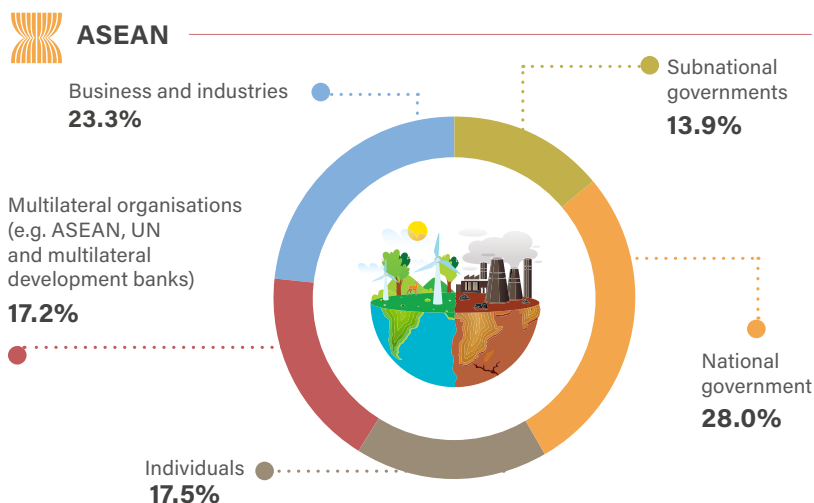
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19-30

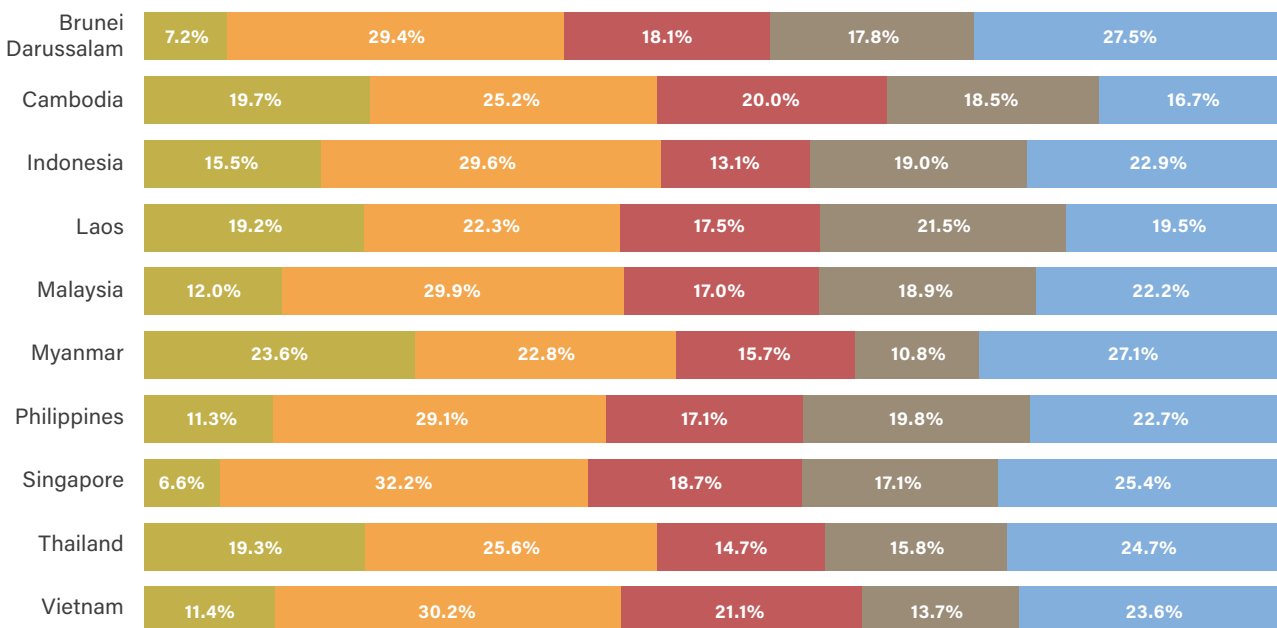


13 In your opinion, who are the top three groups responsible for tackling climate change in your country? (Select three choices⁴)

National governments, businesses and industries, and individuals are perceived as the top three stakeholders responsible for tackling climate change. Brunei Darussalam, Cambodia, Singapore, and Vietnam respondents include multilateral organisations in their top three choices. Myanmar and Thailand respondents also include subnational governments in their top three choices.

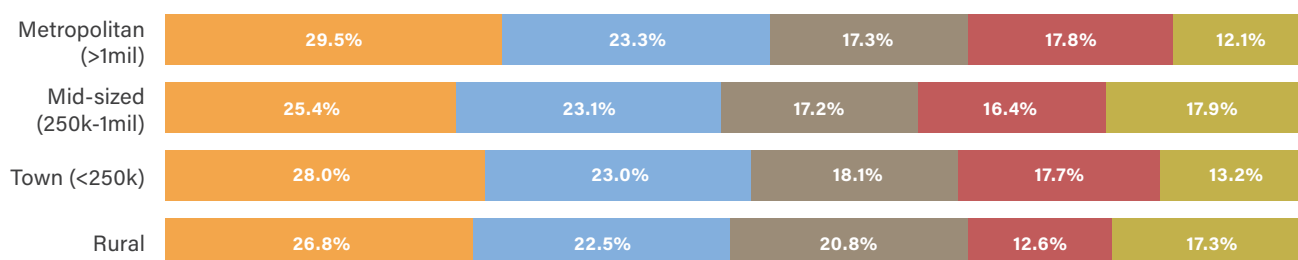


Nationality



Interestingly, respondents from rural areas take a stronger view that individuals (20.8%) are responsible for tackling climate change – the highest compared to residents living in metropolitan cities (17.3%), mid-sized cities (17.2%), and towns (18.1%).

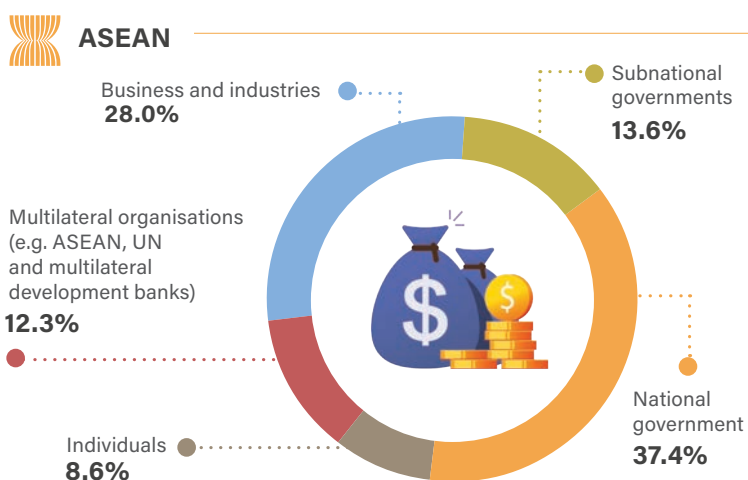
City Type



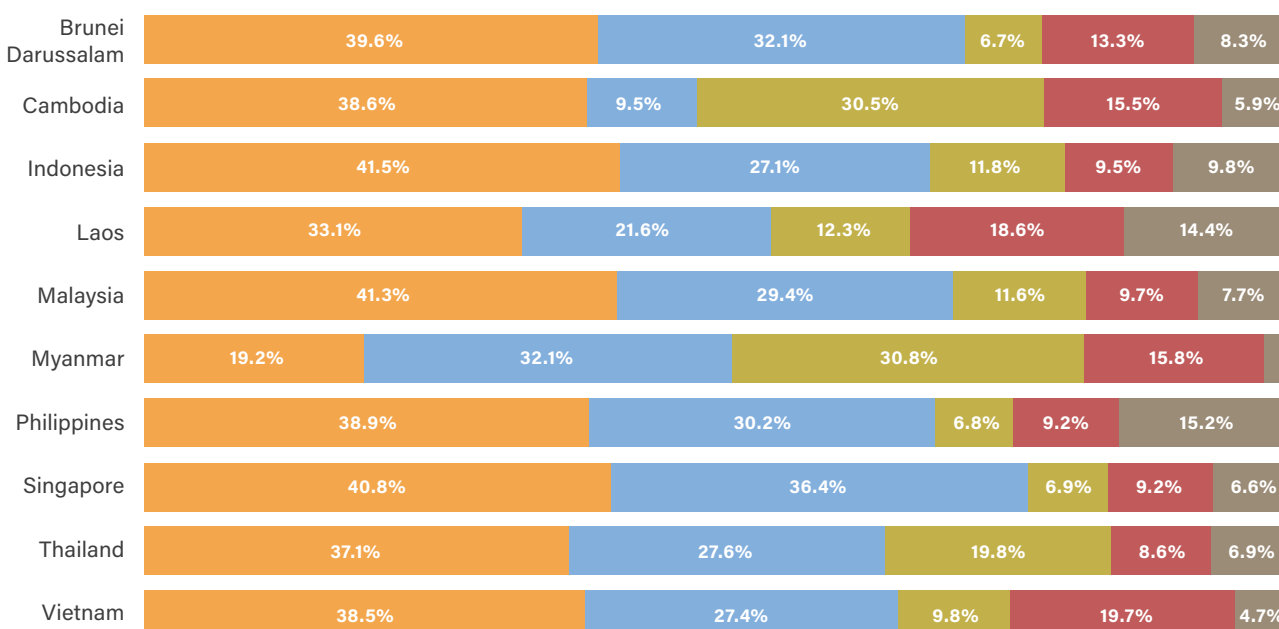
⁴ In this question, all respondents selected three choices. For consistency, results were scaled to 100%.

14 In your opinion, who should bear the greatest costs of climate change measures in your country? (Select your top two choices⁵)

The majority of respondents choose national governments (37.4%) and businesses and industries (28.0%) as the two stakeholders who should bear the cost of climate change measures. Cambodia and Myanmar respondents put subnational governments in their top two choices.

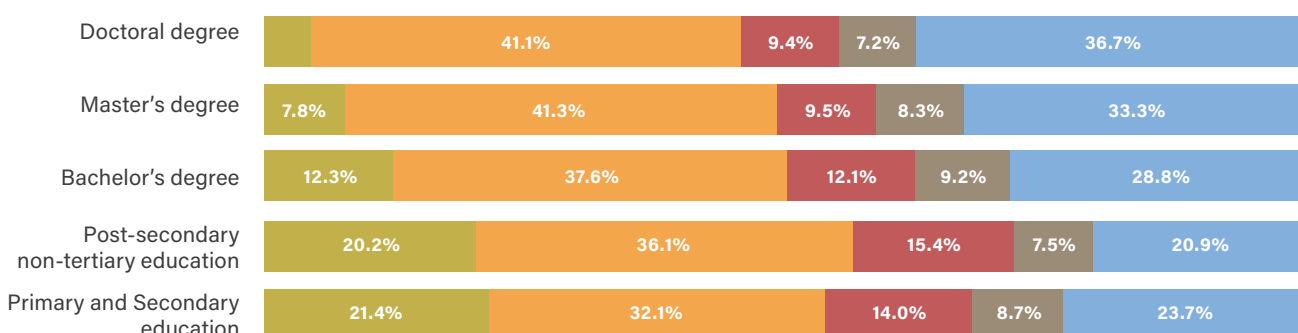


Nationality



Results also show that respondents with Doctoral degrees (36.7%), Master’s degrees (33.3%), and Bachelor’s degrees (28.8%) are more likely to hold the private sector responsible for bearing the cost of climate measures. Interestingly, the lower the educational attainment of a respondent, the more likely they are to choose subnational governments to bear the cost of climate measures.

Education

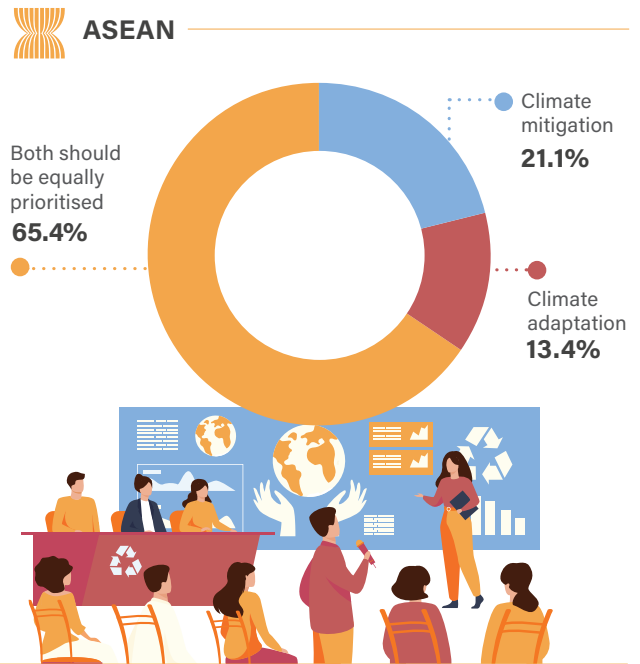


⁵ In this question, all respondents selected two choices. For consistency, results were scaled to 100%.

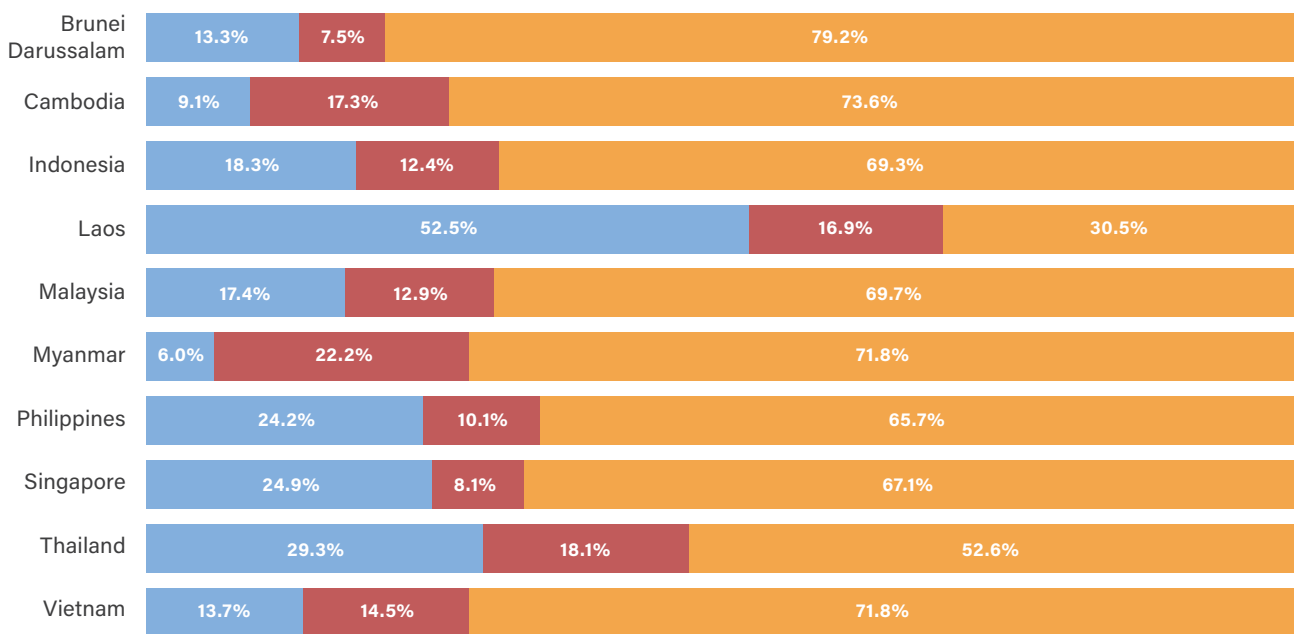
15 Which should governments prioritise: Adaptation or Mitigation?

65.4% of all the respondents think that their governments should prioritise both mitigation and adaptation measures. However, only Lao respondents disagree with this view. More than half of them think that their governments must prioritise climate mitigation. Of note, Myanmar (22.2%), Thailand (18.1%), and Cambodia (17.3%) respondents are the top three cohorts who emphasise the strongest view on climate adaptation.

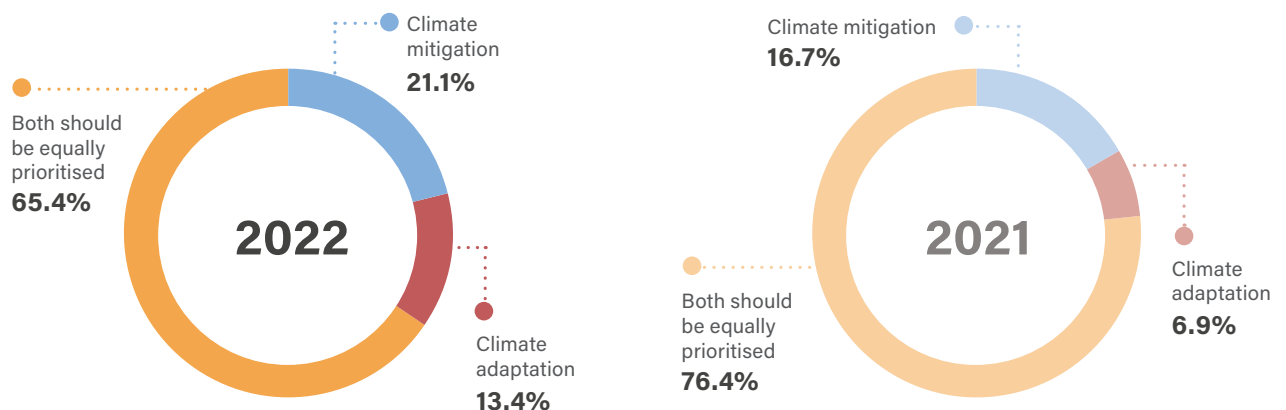
Overall, the support for climate adaptation (13.4%) has increased almost two-fold compared to last year's survey (6.9%). This could be due to the rising concerns of climate-disasters in the region. Earlier this year, Malaysia's Klang Valley Area was hit hard by flash flood (Rodzi, 2022) and Singapore experienced the second-highest temperature on record (Ang, 2022).



Nationality



Year



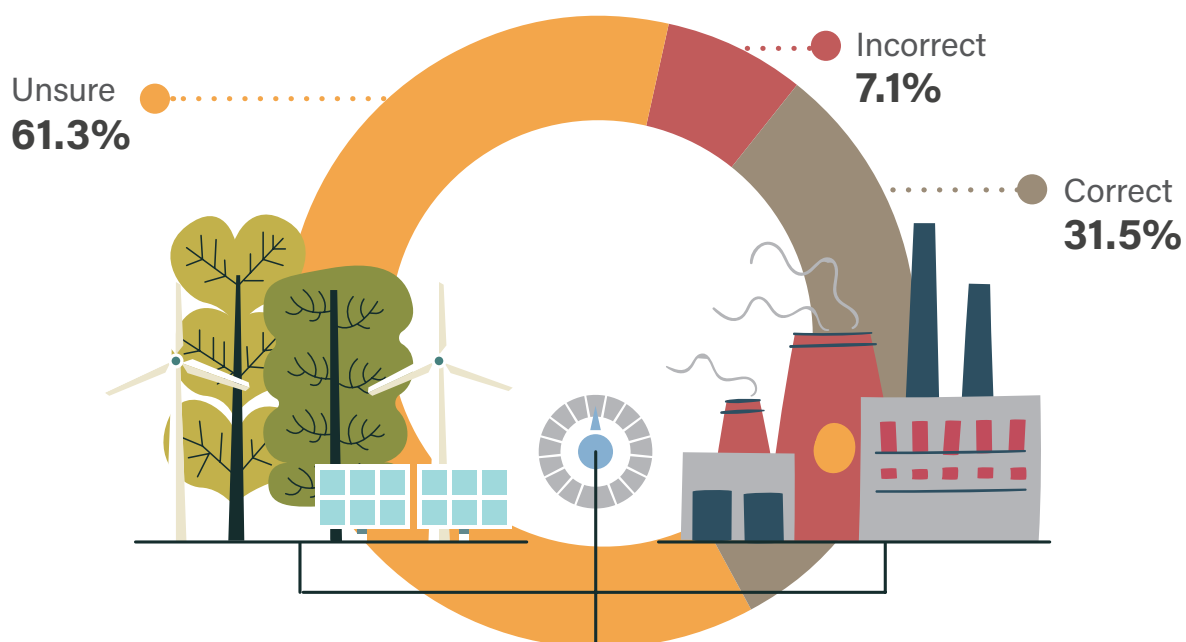
16 Does your country have a net-zero target?

By mid-2022 and prior to the commencement of this survey, all ASEAN countries except Myanmar and the Philippines had set a net-zero or carbon neutrality target by way of a policy document or a political pledge.

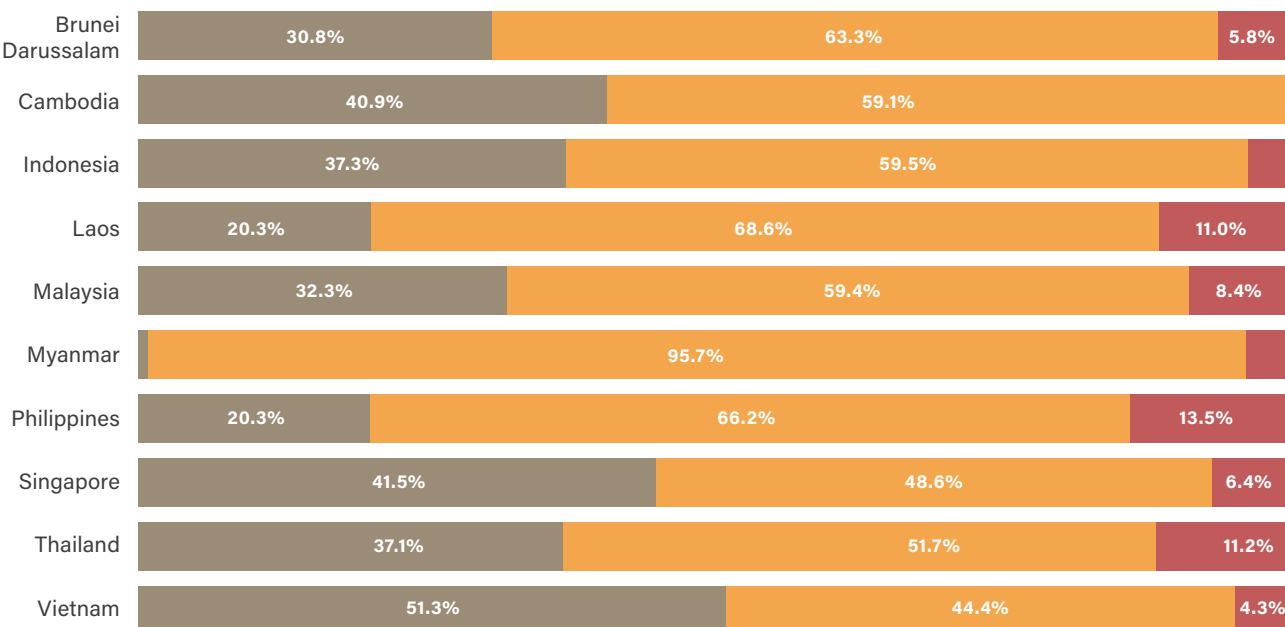
Majority of regional respondents (61.3%) are unsure whether their country had a net-zero target and 30.7% are confident that their country has a net-zero target. Only 31.5% answered correctly. The highest accuracy is seen among Vietnam, Singapore and Cambodia respondents, of whom 51.3%, 45.1% and 40.9% respectively correctly indicate "Yes". Meanwhile, the Philippines has the highest proportion of incorrect answers: 13.5% wrongly believe that the Philippines has a net-zero target. It is followed by Laos and Thailand, where 11.0% and 11.2% of respondents incorrectly state that their countries do not have net-zero targets.



ASEAN



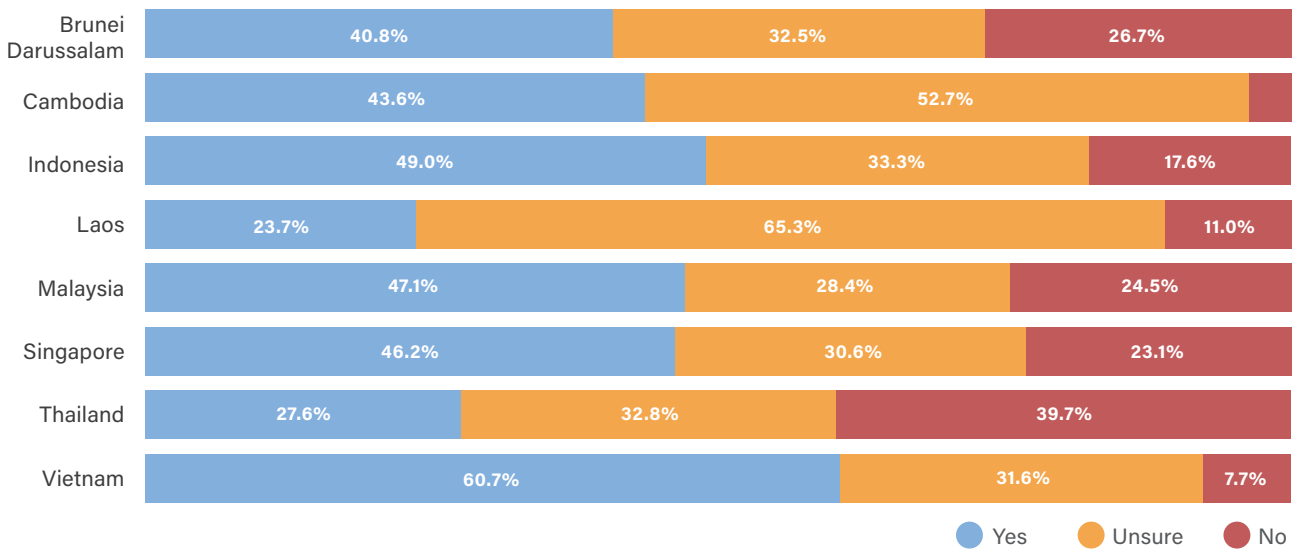
Nationality



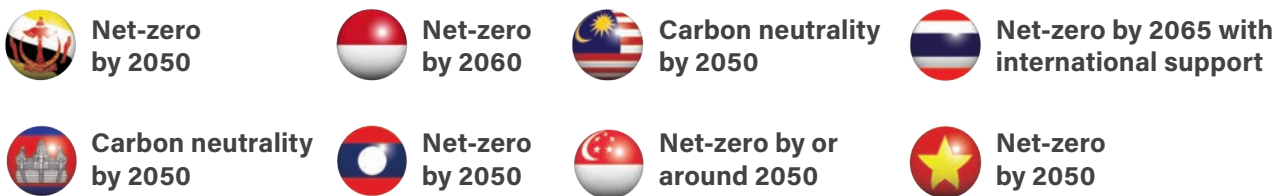
17 Do you think your country's net-zero target is ambitious enough?

Respondents (excluding those from Myanmar and the Philippines) were then informed of their countries' respective net-zero targets (briefly summarised below). Of these respondents, those from Vietnam are the most satisfied with their net-zero target: 60.7% felt that it was ambitious enough. In contrast, Thailand has the highest proportion of respondents who feel that their net-zero target is not ambitious enough (39.7%). Ambivalence is dominant among Laos and Cambodia respondents: 65.3% and 52.7% respectively are still unsure despite being informed of their countries' targets.

Nationality

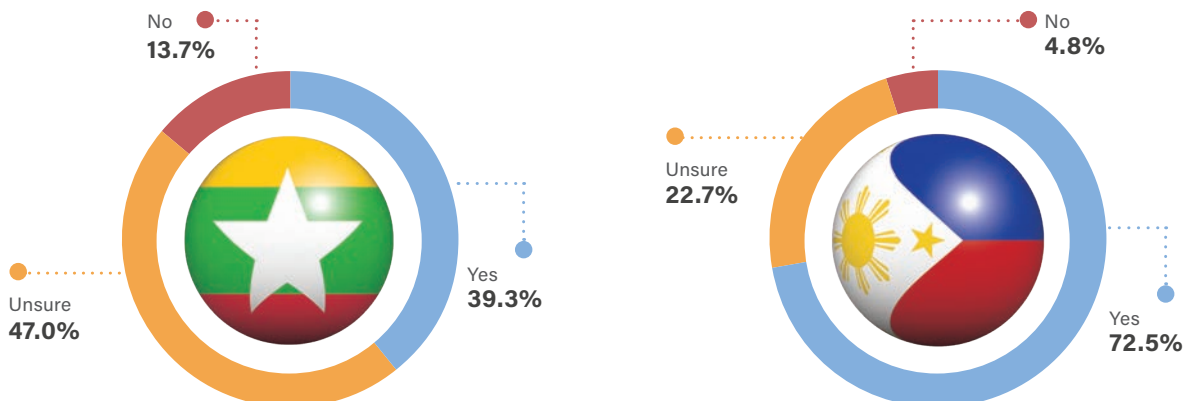


ASEAN countries' net-zero/carbon neutrality targets⁶



Do you think your country should set a net-zero target?

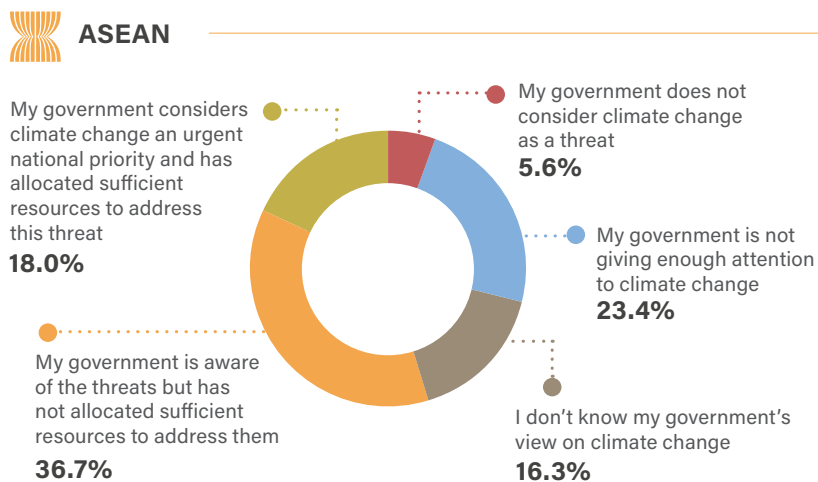
Respondents from Myanmar and the Philippines were informed that their countries had not set a net-zero target. 72.5% of Philippines respondents indicated that their country should have a net-zero target, while Myanmar respondents are less eager, with close to half (47.0%) unsure of whether they should have a net-zero target.



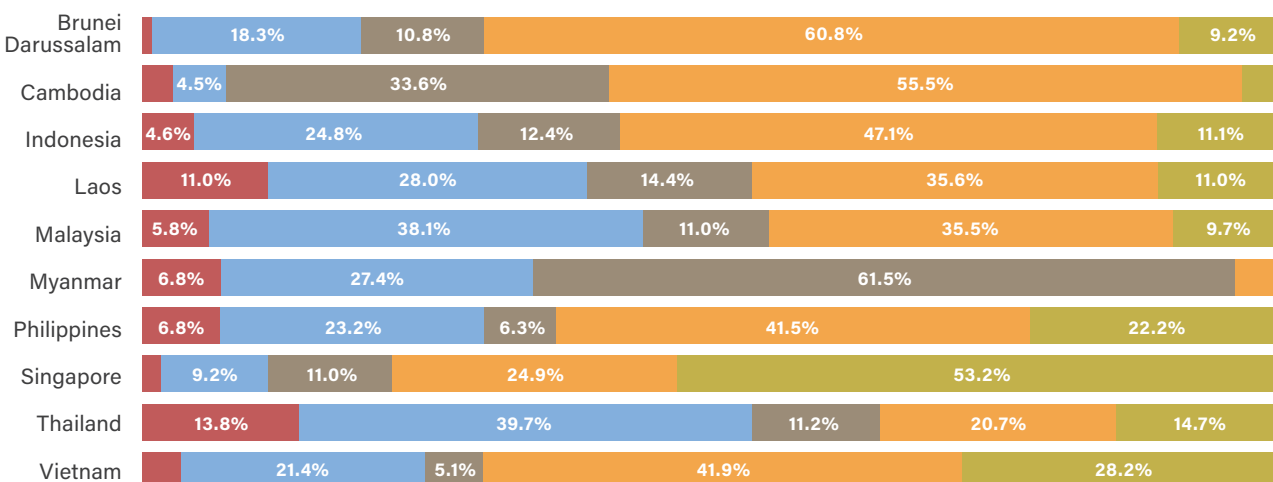
⁶This information was shared during the survey.

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

Only 18.0% of respondents feel that their governments have allocated sufficient resources to address climate change. This is a slight increase from last year's survey (15.7%). More than half (53.2%) of Singapore respondents agree with this view, the highest among all countries. Thailand (53.5%), Malaysia (43.9%) and Laos (39.0%) respondents are the most sceptical of their governments as they think their governments either do not consider climate change a threat, or do not give attention to climate change.



Nationality

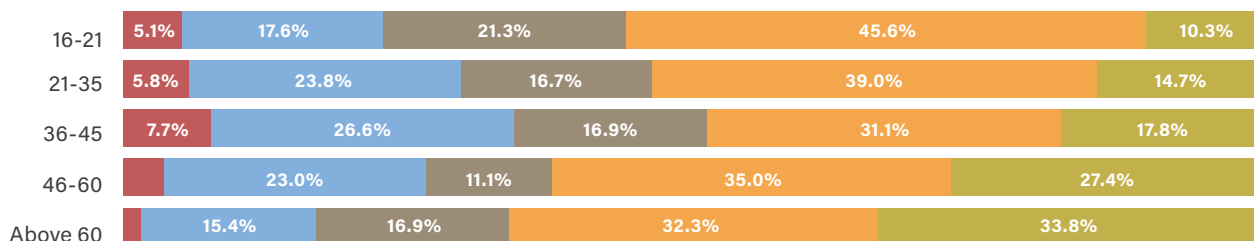


Year



Overall, older respondents tend to have a better opinion of their governments' climate policies and action. 33.8% of those above 60 feel that their governments allocate enough resources for climate change, but only 10.3% of those aged 16-21 agree. Meanwhile, respondents aged 36-45 have the least favourable view of their governments: 34.3% say their governments either do not consider climate change a threat or not pay enough attention to climate change.

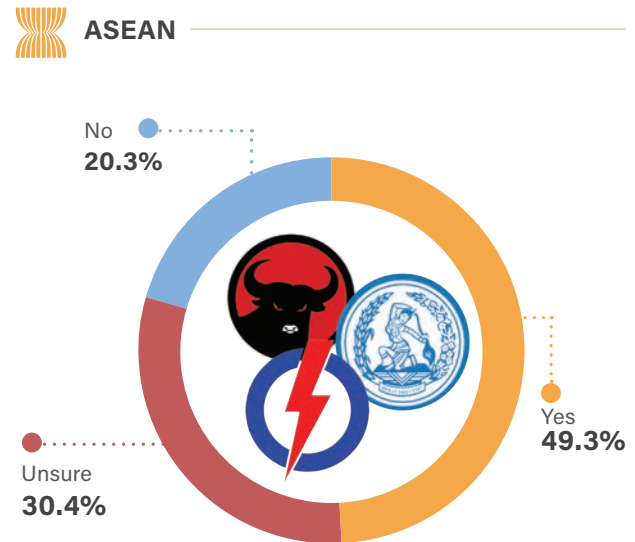
Age



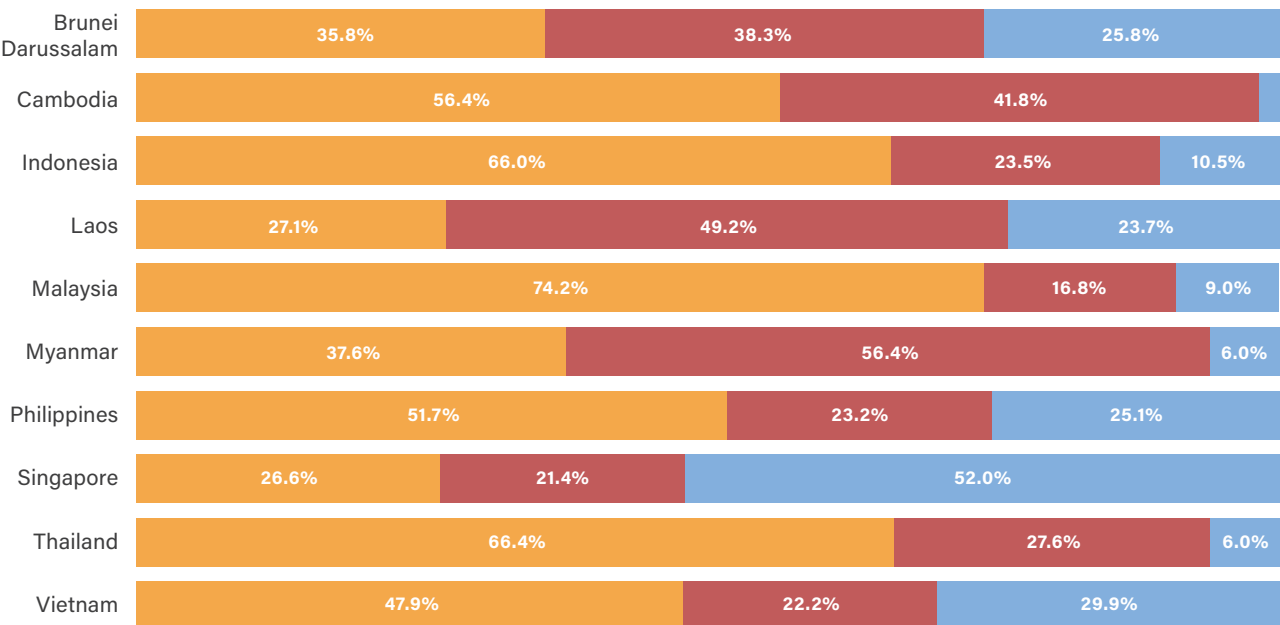
19 "My country's political parties do not prioritise climate change." Do you agree?

Almost half of ASEAN respondents (49.3%) believe that their countries' political parties do not prioritise climate change. Among this group of sceptics, Malaysia (74.2%), Thailand (66.4%), Indonesia (66.0%), and Philippines (51.7%) respondents widely share this view. Only Singapore respondents have a greater tendency to disagree that their country's political parties do not prioritise climate change (52.0%).

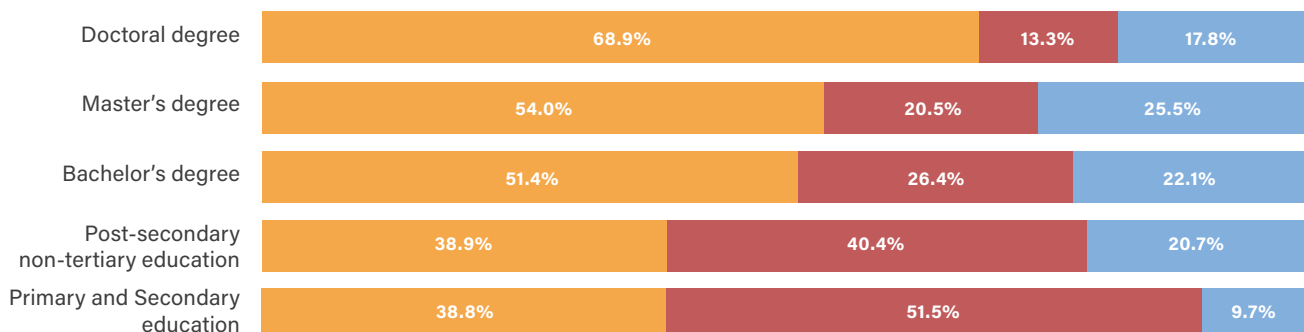
Interestingly, the higher the educational attainment of respondents, the more likely they are to hold the view that their countries' political parties do not prioritise climate change. For example, 68.9% of respondents with Doctoral degrees or equivalent share this view, but only 38.8% of those with primary and secondary degrees agree with this view. Those with the primary and secondary educational attainment also have the largest share of uncertainty (51.5%) in responding to this question.



Nationality



Education



20 The biggest obstacle to decarbonisation in my country is... (choose up to 3 options⁷)

Overall, respondents attribute insufficient financial resources; lack of R&D, technology, and expertise; and insufficient alternative energy resources as the top three obstacles to decarbonisation in their countries. However, 50.3% of Indonesia respondents think that lack of public support is the main challenge. Meanwhile, 60.6% of Malaysia respondents argue that an absence of political will hampers their country's decarbonisation journey.

There are some divergent opinions across affiliations. Results show that those affiliated with academia, think-tanks, and research institutions (55.3%) are more likely to attribute decarbonisation challenges to an absence of political will whereas those from the media (58.5%) are more likely to attribute to the lack of public support. Those from businesses (50.9%), governments (52.7%), and international organisations (51.1%) point to a lack of R&D, technology, and expertise. Civil society and NGOs (49.7%) and students and retirees (60.2%) underline insufficient alternative energy resources and inadequate financial resources, respectively.



Nationality

	Insufficient financial resources	Lack of R&D, technology and expertise	Insufficient alternative energy resources	Absence of political will	Lack of public support	Other domestic priorities (e.g. economic recovery)	Current geo-political events (e.g. war in Ukraine)
ASEAN	50.9%	50.4%	45.7%	39.2%	38.8%	23.1%	12.3%
Brunei Darussalam	42.5%	59.2%	52.5%	31.7%	55.0%	43.3%	7.5%
Cambodia	55.5%	51.8%	55.5%	44.5%	50.9%	11.8%	19.1%
Indonesia	45.1%	47.1%	28.8%	42.5%	50.3%	47.7%	10.5%
Laos	63.6%	49.2%	20.3%	39.0%	46.6%	40.7%	25.4%
Malaysia	47.7%	47.7%	35.5%	60.6%	37.4%	46.5%	7.1%
Myanmar	82.9%	82.1%	65.8%	31.6%	2.6%	33.3%	0.9%
Philippines	56.5%	35.3%	46.9%	53.6%	42.0%	37.7%	8.2%
Singapore	17.9%	36.4%	63.0%	19.7%	41.0%	47.4%	23.1%
Thailand	35.3%	49.1%	36.2%	38.8%	31.9%	46.6%	12.9%
Vietnam	76.1%	65.8%	52.1%	20.5%	23.9%	16.2%	8.5%



Affiliation

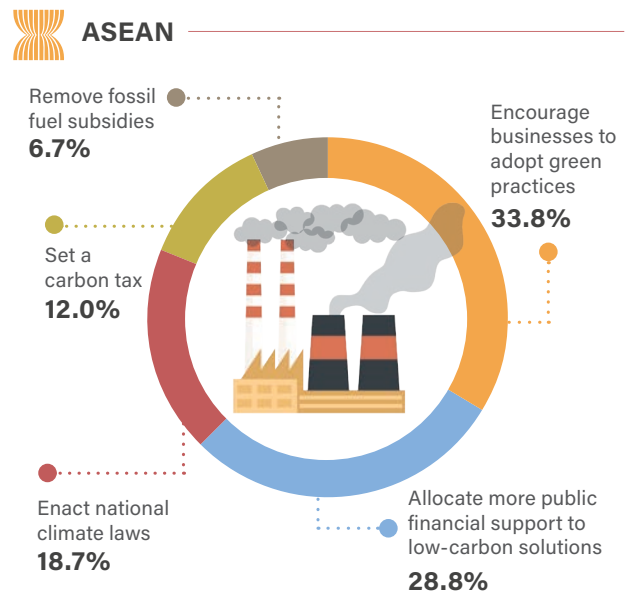
	Insufficient financial resources	Lack of R&D, technology and expertise	Insufficient alternative energy resources	Absence of political will	Lack of public support	Other domestic priorities (e.g. economic recovery)	Current geo-political events (e.g. war in Ukraine)
Academia, Think-Tanks and Research Institutions	45.7%	49.7%	35.5%	55.3%	33.5%	44.2%	10.2%
Business, Finance and Industry	49.4%	50.9%	46.5%	34.8%	40.7%	36.6%	13.8%
Civil Society and Non-Government Organisations	36.2%	40.3%	49.7%	36.9%	41.6%	47.0%	12.1%
Government	52.2%	52.7%	46.7%	40.7%	41.8%	39.0%	13.2%
Media	54.7%	37.7%	43.4%	35.8%	58.5%	34.0%	7.5%
Regional Orgs, IGOs & IOs	48.9%	51.1%	33.3%	40.0%	40.0%	37.8%	8.9%
Students, Retirees and Others	60.2%	54.7%	49.9%	35.8%	34.1%	33.6%	12.5%

⁷ In this question, respondents could select one, two or three options. Hence, results are not scaled and do not add up to 100%.

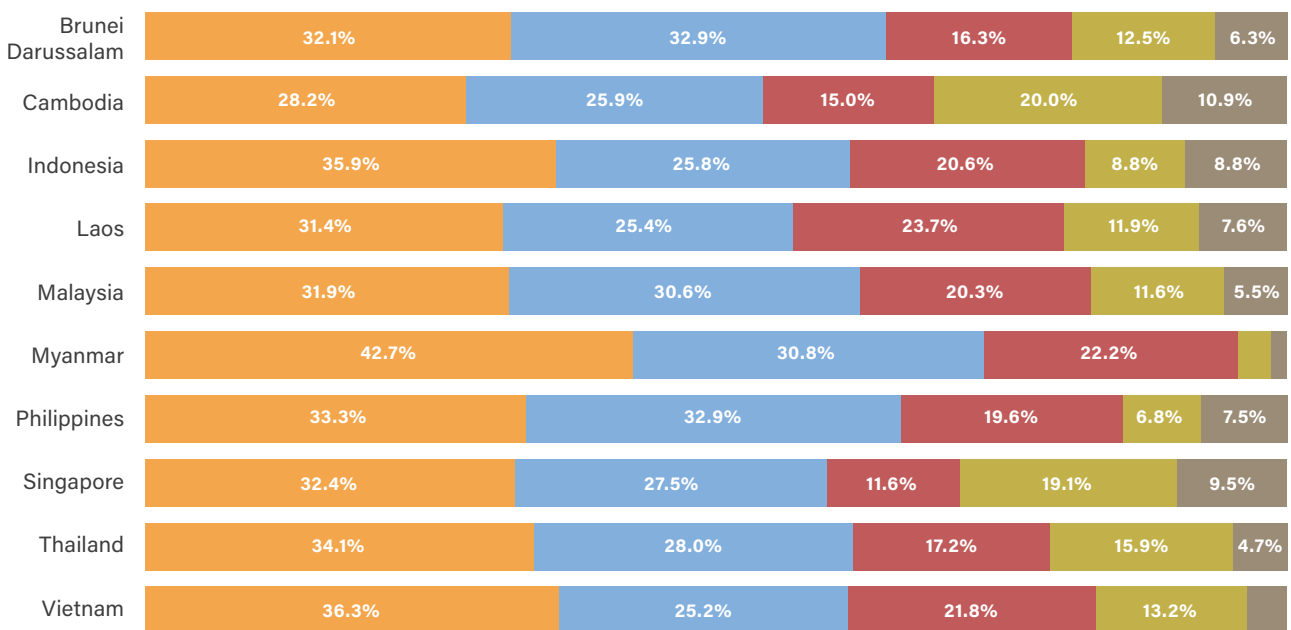
21 What can governments do to reduce carbon emissions in your country? (Select two options of the highest priority⁸)

Respondents think that governments must encourage businesses to adopt green practices (33.8%), allocate more public financial support to low-carbon solutions (28.8%), enact national climate laws and enforce existing law (18.7%) as the top three public interventions in their countries. The support for encouraging businesses to adopt green practices is particularly strong in Myanmar (42.7%), Vietnam (36.3%), Indonesia (35.9%) and Thailand (34.1%).

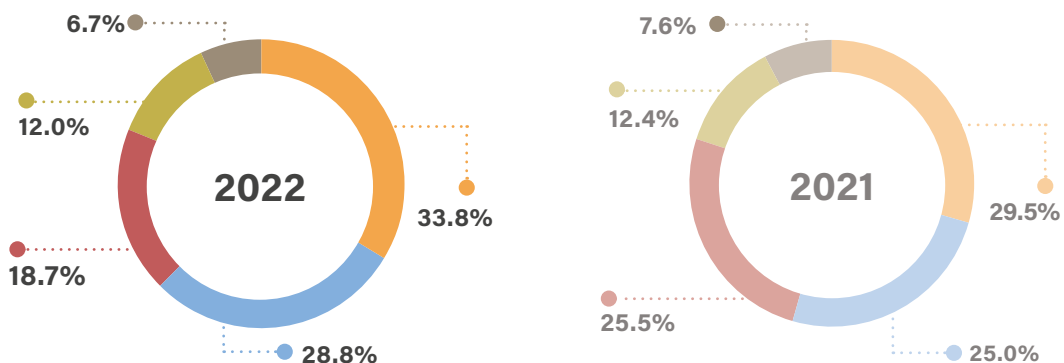
Removing fossil fuels subsidies (6.7%) is the least popular intervention—even less popular compared to the previous year’s survey (7.6%). This could be due to the current supply chain and commodity crisis triggered by the Russia-Ukraine war. Southeast Asian households are starting to feel the pinch of the rising energy costs and staple food prices (The Economist, 2022).



Nationality



Year



⁸ In this question, all respondents selected two choices. For consistency, results were scaled to 100%.

22 What can the private sector do to reduce carbon emissions in your country? (Select two options of the highest priority⁹)

24.7% of respondents feel that adopting green supply chain practices should be prioritised by the private sector, making it the most popular option by far. This view is consistent in most ASEAN countries, except in Cambodia and Laos. 19.1% of Cambodia respondents call for an adoption of greater transparency and accountability in corporate sustainability reporting. Meanwhile, Laos respondents are equally split on demanding investments in R&D and technology, and an adoption of greater transparency and accountability in corporate sustainability reporting (both 23.3%). Subsequently, 19.7% of Vietnam respondents also call for investment in research and development.



Nationality

	Adopt green supply chain practices	Invest in research and development, and technology	Adopt greater transparency and accountability in CSR reporting	Set and commit to a net-zero emissions target	Create public awareness through company campaigns	Provide green investment and financing
ASEAN	24.7%	19.7%	16.4%	13.9%	12.8%	12.3%
Brunei Darussalam	24.2%	18.8%	17.1%	10.0%	16.7%	13.3%
Cambodia	17.3%	16.8%	19.1%	15.0%	13.2%	18.6%
Indonesia	24.5%	21.2%	11.4%	14.1%	11.1%	17.6%
Laos	18.2%	23.3%	23.3%	8.9%	16.1%	10.2%
Malaysia	29.0%	18.7%	11.6%	17.4%	12.9%	10.3%
Myanmar	26.5%	17.9%	15.8%	1.3%	23.1%	15.4%
Philippines	27.8%	21.7%	14.0%	16.9%	8.0%	11.6%
Singapore	26.0%	19.1%	16.8%	18.8%	9.8%	9.5%
Thailand	24.1%	18.5%	20.7%	16.8%	10.3%	9.5%
Vietnam	25.2%	19.7%	19.2%	14.5%	12.8%	8.5%

Only 12.3% of respondents give attention to green investment and financing. However, support for this intervention is generally strong from all affiliations, except from academia, think-tanks, and research institutions (9.4%).



Affiliation

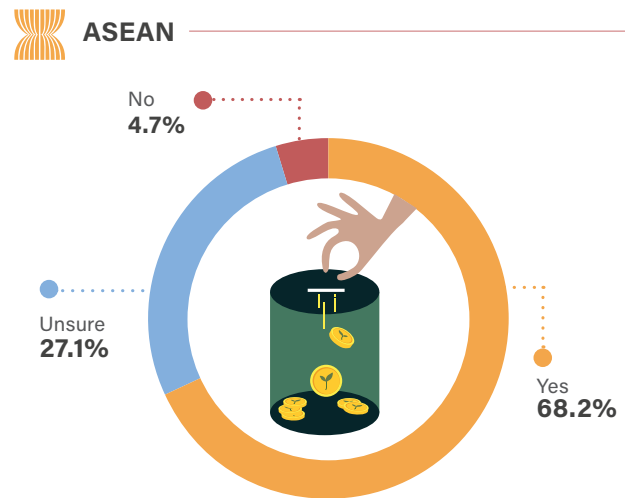
	Adopt greater transparency and accountability in CSR reporting	Adopt green supply chain practices	Create public awareness through company campaigns	Invest in research and development, and technology	Provide green investment and financing	Set and commit to a net-zero emissions target
Academia, Think-Tanks and Research Institutions	16.5%	27.9%	9.1%	21.3%	9.4%	15.7%
Business, Finance and Industry	17.5%	23.9%	11.1%	20.2%	12.9%	14.3%
Civil Society and Non-Government Organisations	15.8%	25.5%	12.8%	15.8%	12.4%	17.8%
Government	17.0%	24.2%	14.8%	17.9%	12.4%	13.7%
Media	15.1%	22.6%	16.0%	17.9%	15.1%	13.2%
Regional Orgs, IGOs & IOs	16.7%	20.0%	12.2%	24.4%	15.6%	11.1%
Students, Retirees and Others	15.3%	24.8%	15.3%	20.6%	12.5%	11.5%

⁹ In this question, all respondents selected two choices. For consistency, results were scaled to 100%.

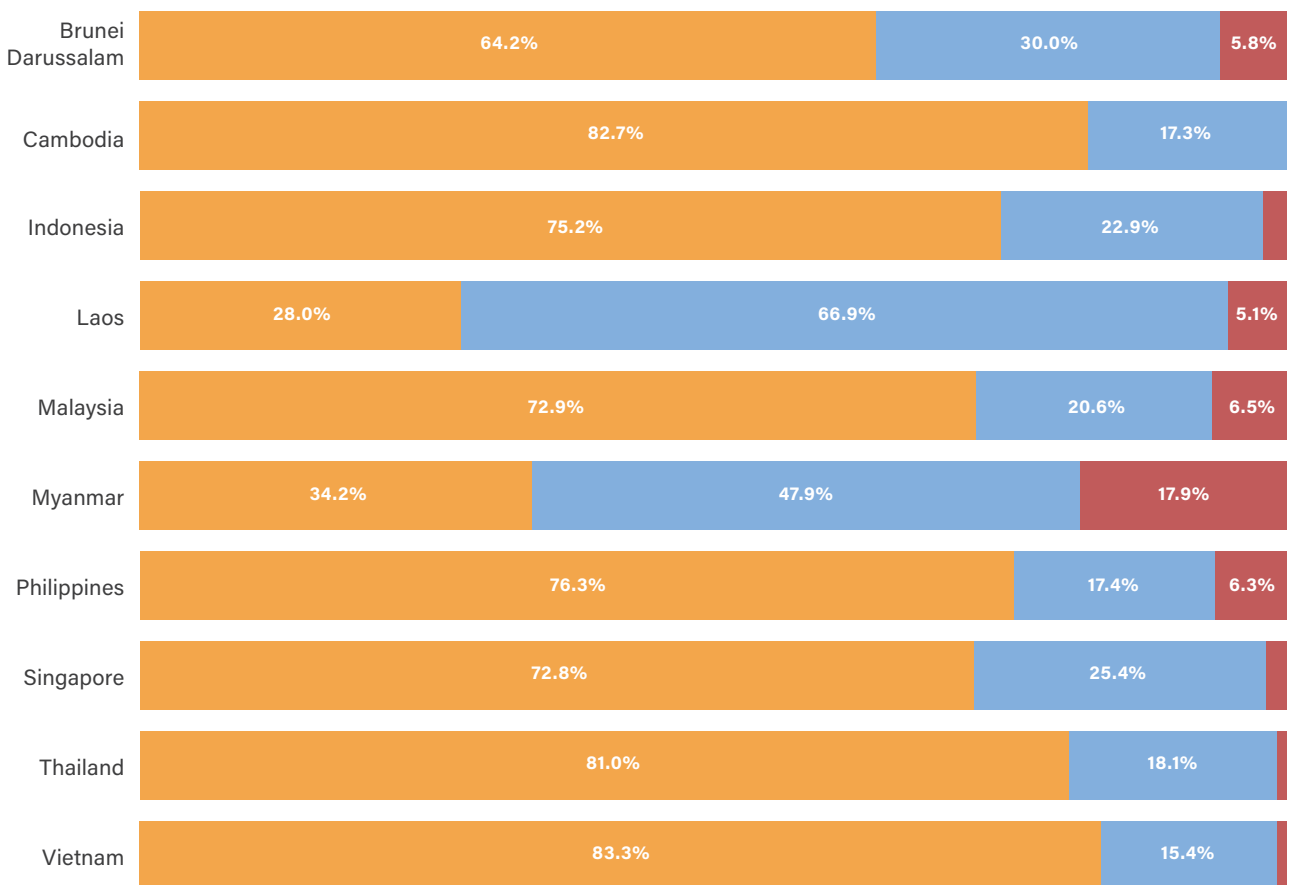
23 Do you think your government's economic recovery spending should contribute to a green transition?

68.2% of respondents show significant support for their governments to provide economic recovery spending toward a green transition. This view is consistent in most ASEAN countries, except for Laos and Myanmar. 66.9% and 47.9% of Lao and Myanmar respondents respectively are unsure about the answer to this question.

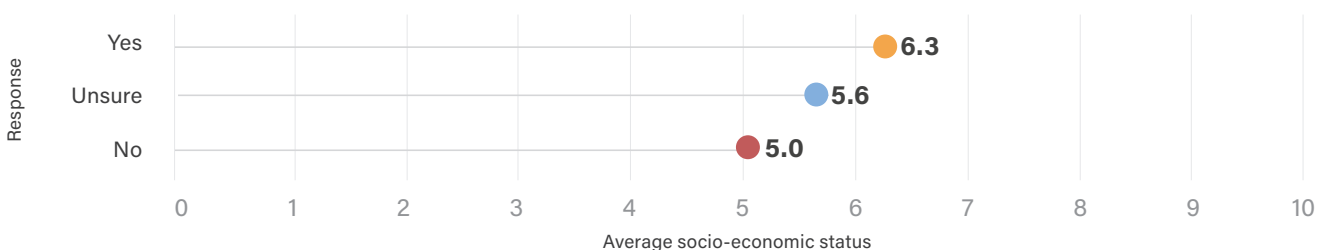
Results also show that the higher the socio-economic status of respondents, the higher the likelihood of supporting an economic recovery spending that contributes to a green transition.



Nationality



Socio-Economic Status

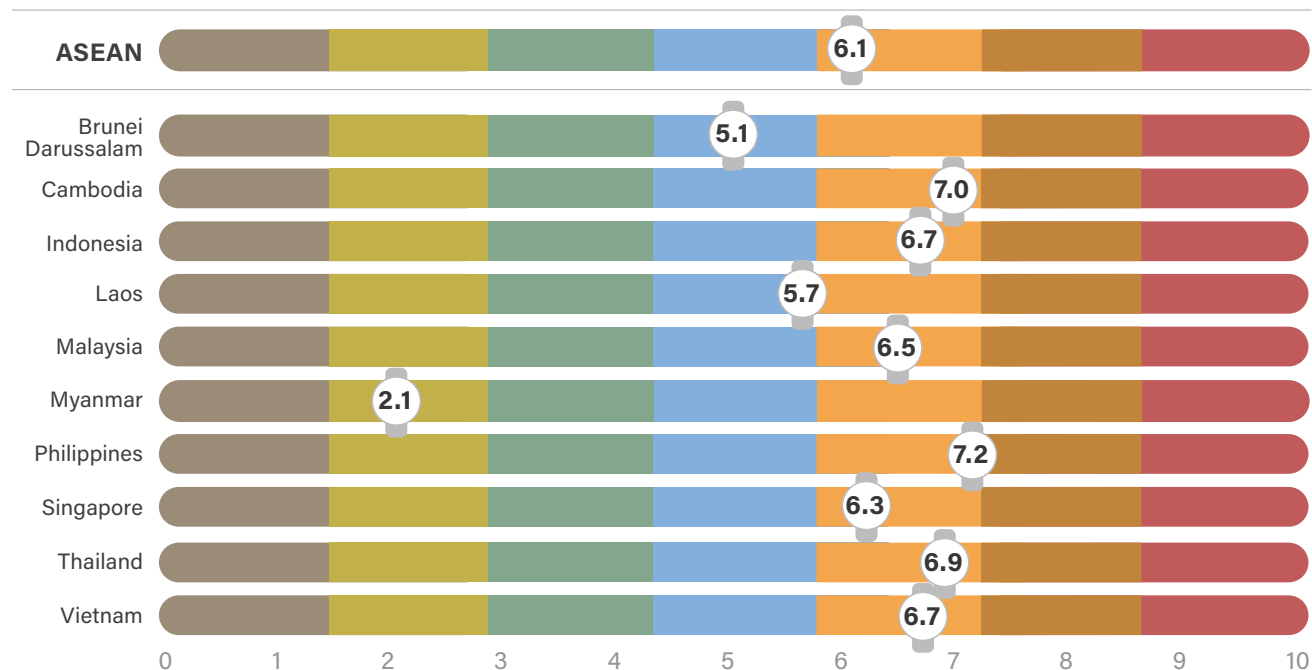


24 On a scale of 0 to 10, how willing are you to accept a carbon tax for the sake of the climate?

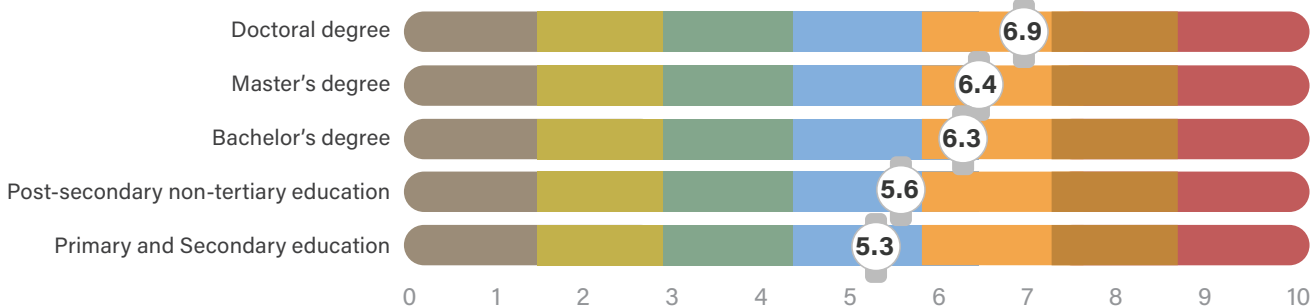
Respondents from the Philippines (7.2), Cambodia (7.0), and Thailand (6.9) are more willing to accept a carbon tax for the sake of the climate than the other regional respondents. Myanmar respondents (2.1) are least likely to accept this proposition.

Results also indicate that the higher the educational attainment of respondents, the higher the acceptance of a carbon tax for the climate. Similarly, the higher the economic status of respondents, the higher their receptiveness to a carbon tax. Respondents at the lower end of the socio-economic hierarchy (4.4) are more likely to reject a carbon tax indicating that bread and butter issues concern them more than climate issues.

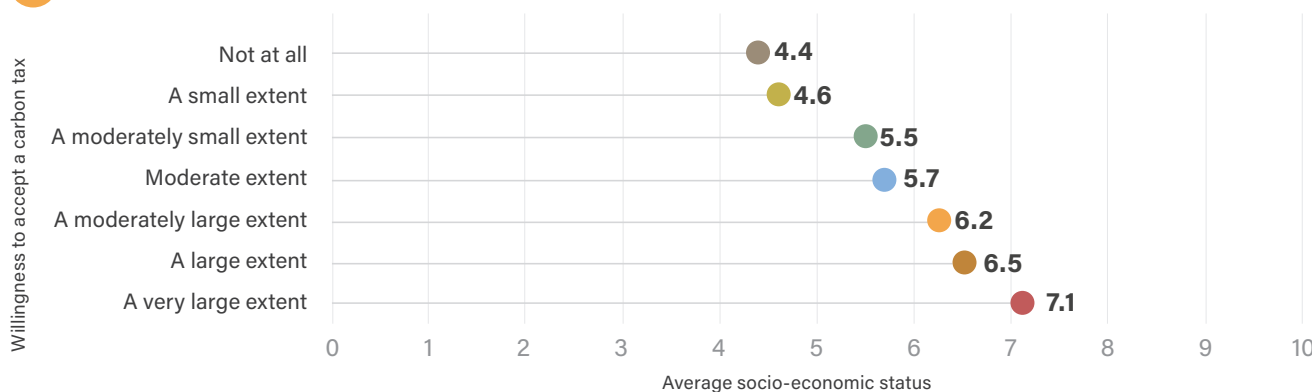
Nationality



Education



Socio-Economic Status

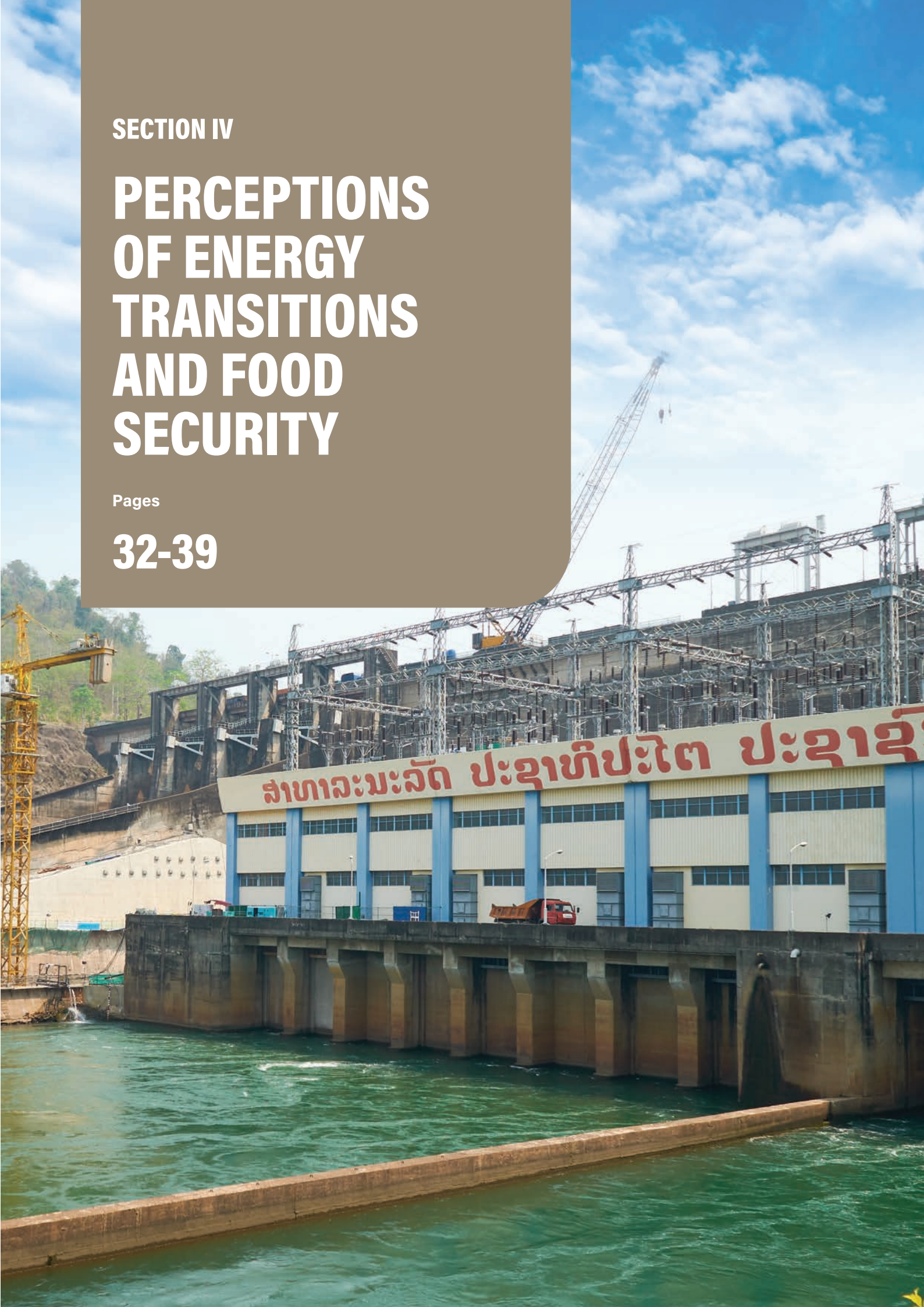


SECTION IV

PERCEPTIONS OF ENERGY TRANSITIONS AND FOOD SECURITY

Pages

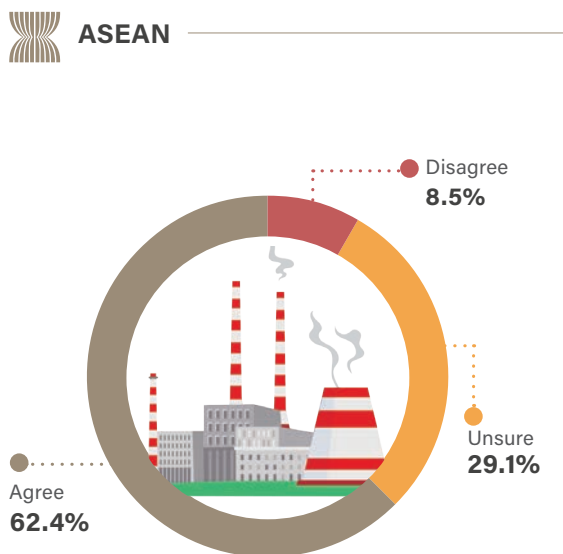
32-39



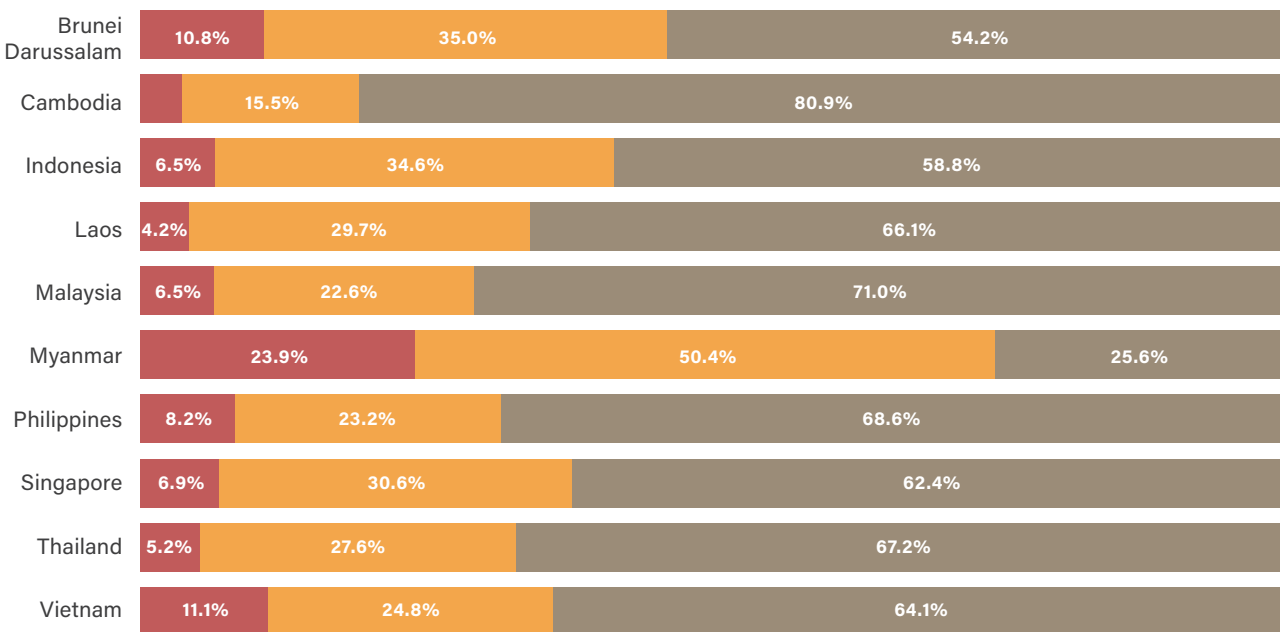
25 "ASEAN countries should stop building new coal power plants immediately." Do you agree?

Majority of Southeast Asians think that regional countries should immediately cease building new coal power plants (62.4%). This sentiment is strongest in Cambodia (80.9%), followed by Malaysia (71.0%) and the Philippines (68.6%). According to a report by E3G (Littlecott et al., 2021), three countries in Southeast Asia – Malaysia, Myanmar and Brunei – no longer have any new coal pipeline.

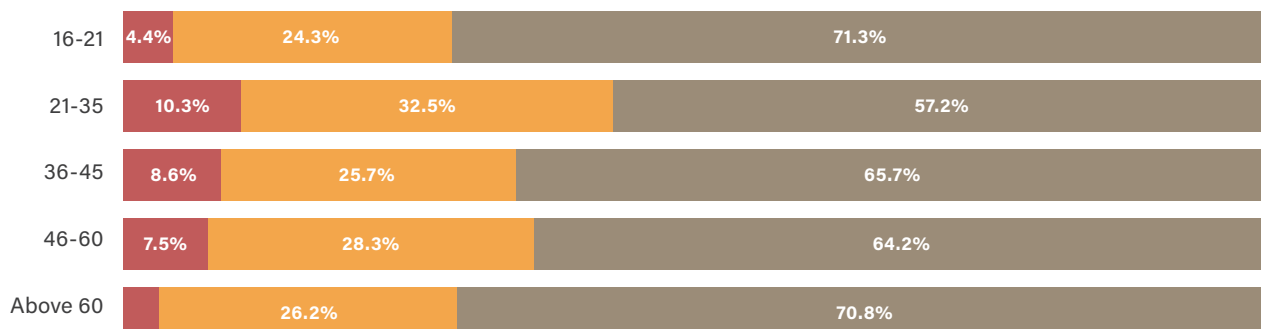
The largest group of respondents in disagreement are from Myanmar (23.9%) and Vietnam (11.1%). Myanmar also accounts for the largest group of respondents who are unsure about the issue (50.4%). The youngest (16-21 years old) and oldest (60 and above) groups of respondents express the strongest support for scrapping plans to build new coal plants. This shows that climate change is an important issue for both young adults as well as with older persons. Disagreement is strongest among respondents aged between 21-35 and 36-45. A large share of respondents aged between 21-35 are also unsure about the issue.



Nationality



Age

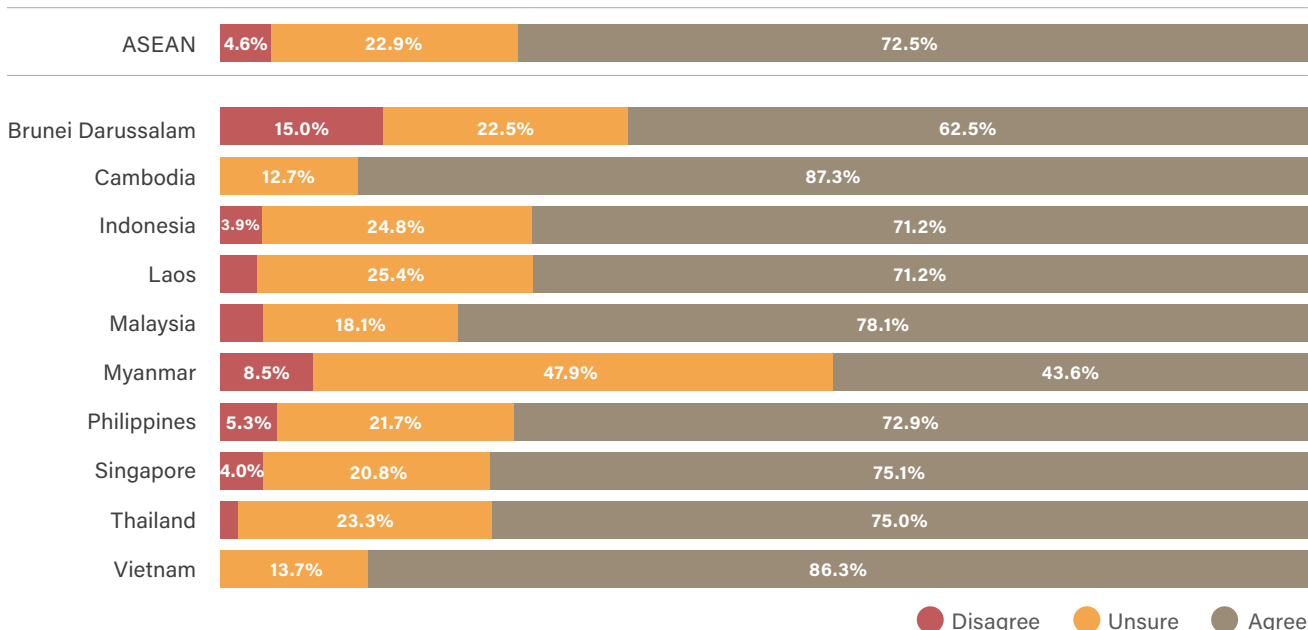


26 "ASEAN countries should cut their reliance on coal as soon as possible." Do you agree?

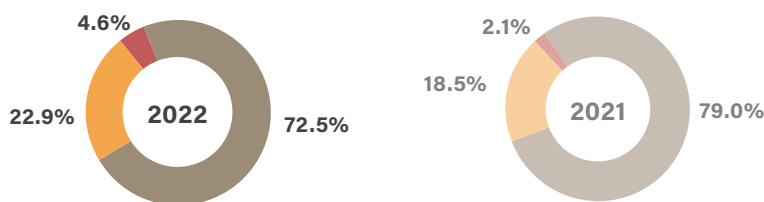
Southeast Asia remains one of the regions with expanding coal generating capacity, particularly in Indonesia, Vietnam and the Philippines (International Energy Agency, 2020). Majority (72.5%) of respondents believe that regional countries should cut their reliance on coal. This is a slight decline from last year's tally of 79.0%, which may indicate that rising energy prices caused by the Russia-Ukraine war has given rise to a more favourable perception of the use of coal.

The highest levels of agreement are among respondents in Cambodia (87.3%), followed by Vietnam (86.3%) and Malaysia (78.1%). Respondents from Brunei, Indonesia, Laos, and Myanmar fall below the regional average in sharing this view. The greatest number of respondents who disagree are from Brunei Darussalam (15.0%), while Myanmar has the highest number of respondents who were unsure (47.9%).

Nationality



Year



Consensus for ending coal reliance exists across various city types, with the highest levels of agreement in rural areas (87.0%), followed by metropolitan areas (76.8%). Residents living in towns (8.2%) have a greater tendency to disagree with the need to cut coal reliance while a significant proportion of respondents from mid-sized cities are undecided about the issue (29.5%). The findings show that while majority of Southeast Asians approve the reduction of coal reliance, there is still space for generating knowledge and awareness on this issue.

City Type

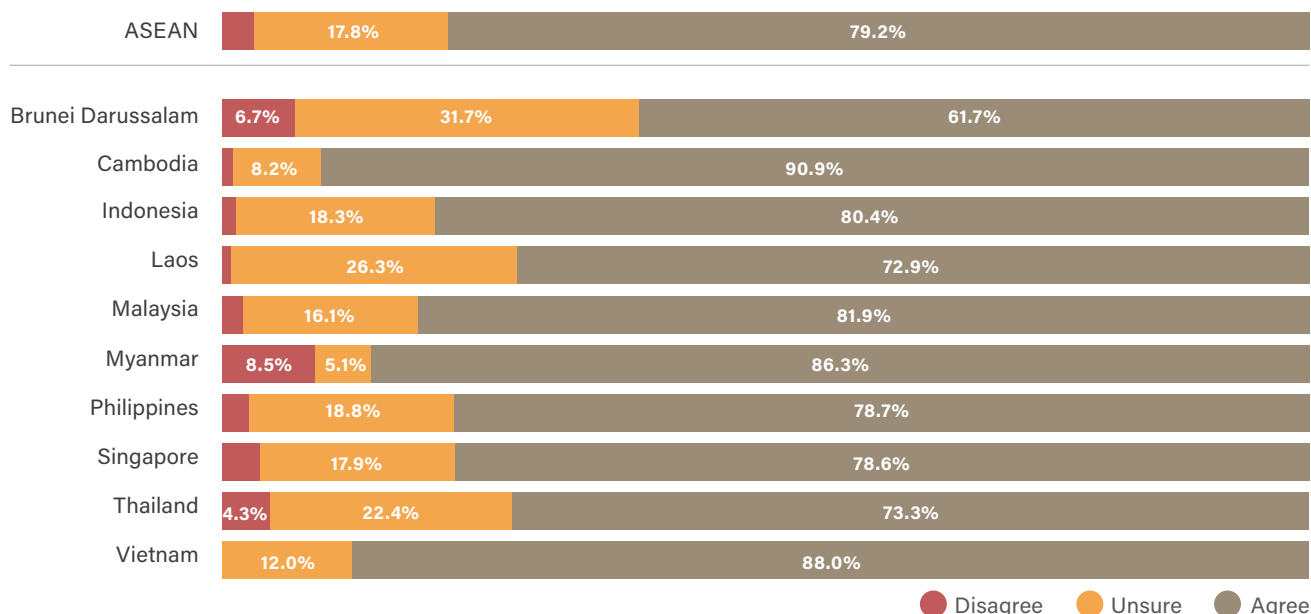


27 "Reduction of dependence on fossil fuels will be painful in the short term but beneficial to ASEAN economies in the long term." Do you agree?

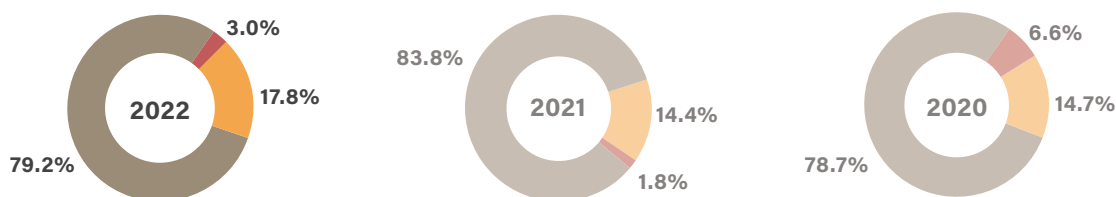
There is consensus in Southeast Asia on the long-term benefits of ending fossil fuel dependency. Majority (79.2%) of regional respondents adopt this view with 17.8% expressing uncertainty and 3.0% in disagreement. The level of agreement is less compared to 2021 (83.8%) and only slightly higher than 2020 (78.7%). This may indicate that increases in commodity prices has made respondents sceptical about the long-term benefits of reducing fossil fuel dependency. While majority of respondents in all three years recognise the benefits of reducing fossil fuel dependency, in a business-as-usual scenario, ASEAN's coal power capacity is expected to reach 259 GW, about 3.6 times the current capacity by 2040 (ASEAN Centre for Energy, 2020).

Respondents in Cambodia (90.9%) and Vietnam (88.0%) display high levels of agreement about the long-term benefits of ending fossil fuels. Respondents from Myanmar are most likely to disagree (8.5%), while significant levels of uncertainty are apparent among respondents in Brunei Darussalam (31.7%) and Laos (26.3%).

Nationality

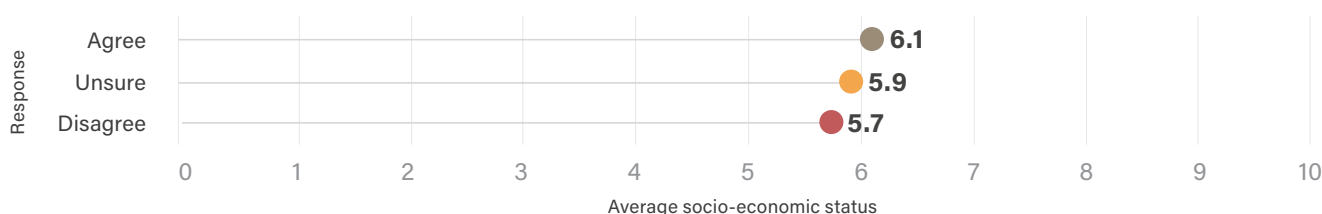


Year



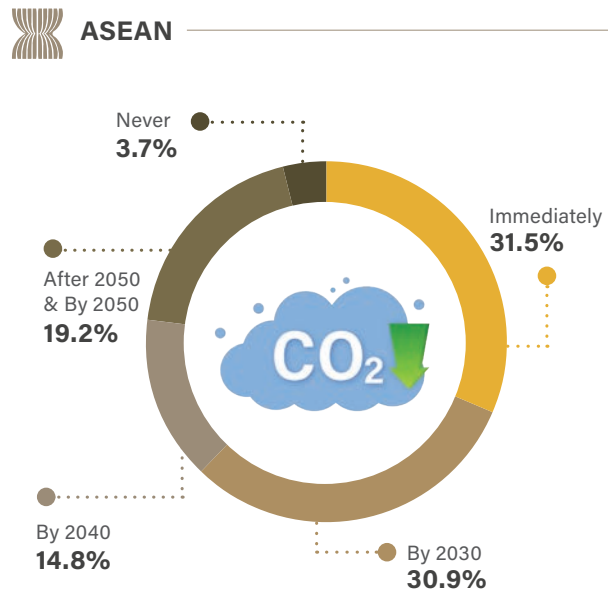
A higher socio-economic status overlaps with willingness to accept the burden of cutting out dependence on fossil fuels, with respondents at the lower ends of the socio-economic spectrum expressing more scepticism of the long-term benefits of such measures. This may indicate that building broad-based support for reducing fossil fuels will require government policies to address underlying social and economic inequalities.

Socio-Economic Status

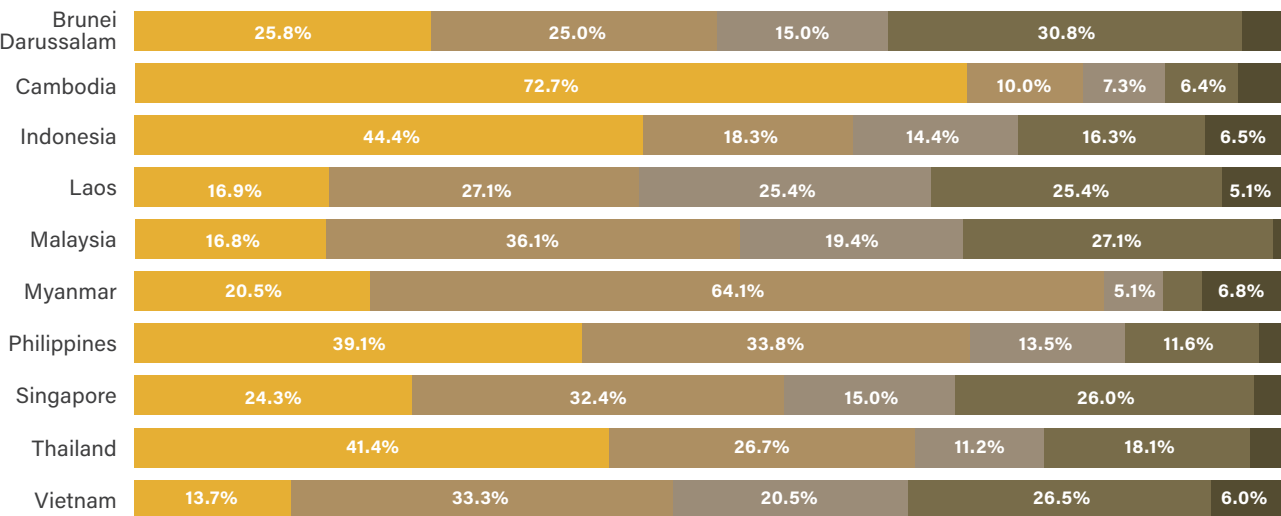


28 My country should phase out coal consumption by...

Majority of regional respondents (62.4%) express a sense of urgency in their perception towards ending coal consumption. This includes respondents who want coal to be phased out immediately (31.5%) and those who think that this should be completed by 2030 (30.9%). Some respondents want coal to be phased out over longer time periods – 14.8% chose 2040 and 19.2% chose after and by 2050 as acceptable timelines. Only a small minority of respondents (3.7%) believe that coal should never be phased out. Cambodia has the highest number of respondents (72.7%) who believe that coal should be phased out immediately, followed by Indonesia (44.4%). Majority of Myanmar respondents (64.1%) chose the 2030 deadline, which also enjoys significant support in Malaysia (36.1%) and the Philippines (33.8%). Respondents from Laos are the largest supporters (25.4%) of ending coal by 2040, while Brunei respondents are the region’s biggest advocates (30.8%) for delaying divestment till 2050 and after.

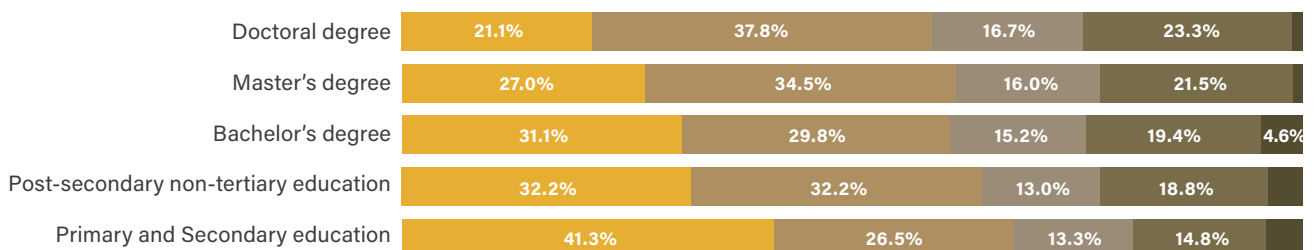


Nationality



Those with basic levels of education (41.3%) show the strongest support for ending coal consumption immediately, while those with Doctoral degrees or equivalent (16.7%) are most likely to agree with divestment by 2040. These results indicate that respondents with basic levels of education are keenly aware of the importance of phasing out coal consumption for the climate, while higher educated respondents are likely to be more aware of the economic cost of phasing out coal.

Education



29 In your view, which sources of clean energy have the greatest potential in your country? (Select your top two choices¹⁰)

A diversity of opinions on the potential of clean energy sources domestically are expressed. Solar and hydropower are the most popular choices in Cambodia, Indonesia, Laos, Myanmar and Thailand. In Malaysia, respondents perceive solar most favourably, and give equal levels of importance to hydropower and biofuels. Within the region, the highest preference for wind power is from Vietnam respondents (30.8%), while the biggest support for green hydrogen is from Myanmar respondents (30.3%). Geothermal energy is viewed more favourably in Indonesia (15.4%) and the Philippines (12.8%) than in other countries, while nuclear energy has received the highest levels of support from Singapore respondents (10.7%). Tidal energy is viewed most favourably in Laos (8.1%), followed by Thailand (5.2%).



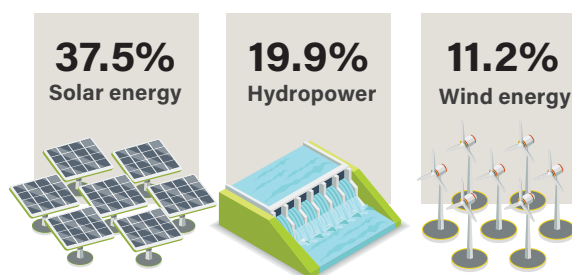
Nationality

	Solar Energy	Hydropower	Wind energy	Green hydrogen	Biofuels	Geothermal energy	Nuclear energy	Tidal energy
Brunei Darussalam	45.0%	11.7%	10.4%	9.6%	12.5%	4.2%	2.5%	4.2%
Cambodia	34.1%	46.8%	2.3%	0.9%	10.9%	2.3%	0.5%	2.3%
Indonesia	31.7%	23.2%	8.2%	7.8%	6.9%	15.4%	3.3%	3.6%
Laos	33.5%	33.9%	10.2%	4.2%	5.1%	2.1%	3.0%	8.1%
Malaysia	43.2%	16.5%	7.7%	9.0%	16.5%	2.6%	2.6%	1.9%
Myanmar	31.6%	36.3%	0.9%	30.3%	0.0%	0.4%	0.0%	0.4%
Philippines	36.5%	12.8%	18.6%	2.9%	6.0%	12.8%	7.7%	2.7%
Singapore	42.5%	6.6%	6.1%	16.2%	10.4%	4.3%	10.7%	3.2%
Thailand	37.5%	21.6%	15.5%	6.0%	9.1%	2.2%	3.0%	5.2%
Vietnam	37.6%	3.4%	30.8%	7.3%	8.5%	1.7%	5.6%	5.1%

The findings correspond to the notion that the rapid deployment of readily available energy technologies such as solar, hydropower, wind and biofuels are critical towards achieving decarbonisation, while innovation and research can lead to greater acceptance of green hydrogen and tidal energy. Renewables can account for two-thirds of total energy supply by 2050, if levels of investment and international cooperation are increased exponentially (International Energy Agency, 2022). Rapid deployment of off-grid technologies can also provide affordable and accessible energy.



Top 3 in ASEAN



The comparison of opinions by respondents indicate that city type plays a role in preference of energy sources. For example, while solar energy is preferred in all city types, hydropower is significantly more popular among respondents in rural areas. This may reflect that rural respondent believe that hydropower projects have a positive impact on local economic growth and electrification (Asian Development Bank, 2014). Green hydrogen is preferred more in urban than rural areas, which may indicate that respondents in cities are more open to new types of clean energy technologies. No respondents from rural areas and only a minority from urban centres support nuclear energy, which highlights apprehensions regarding nuclear safety.



City Type

	Solar Energy	Hydropower	Wind energy	Green hydrogen	Biofuels	Geothermal energy	Nuclear energy	Tidal energy
Metropolitan (>1mil)	38.5%	15.5%	12.0%	9.0%	9.7%	6.2%	6.2%	2.9%
Mid-sized (250k-1mil)	34.7%	27.9%	8.6%	12.6%	5.1%	3.7%	3.1%	4.4%
Town (<250k)	39.1%	18.4%	12.5%	7.6%	10.4%	4.7%	3.1%	4.3%
Rural	37.0%	28.6%	11.7%	2.6%	2.6%	8.4%	0.0%	1.9%

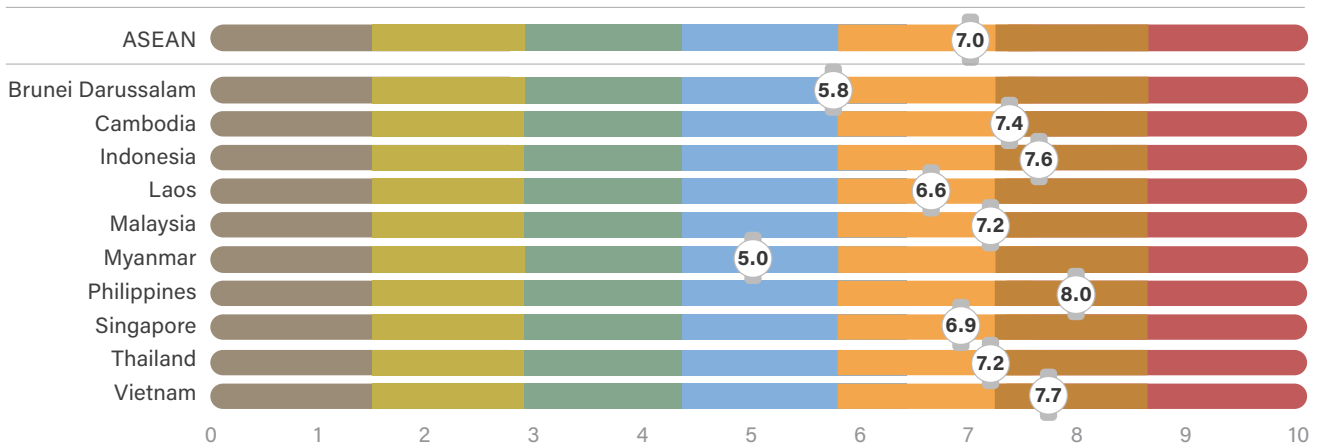
¹⁰In this question, all respondents selected two choices. For consistency, results were scaled to 100%.

30 On a scale of 0-10, how confident are you that adopting climate change measures and policies will drive the innovation and competitiveness of your economy?

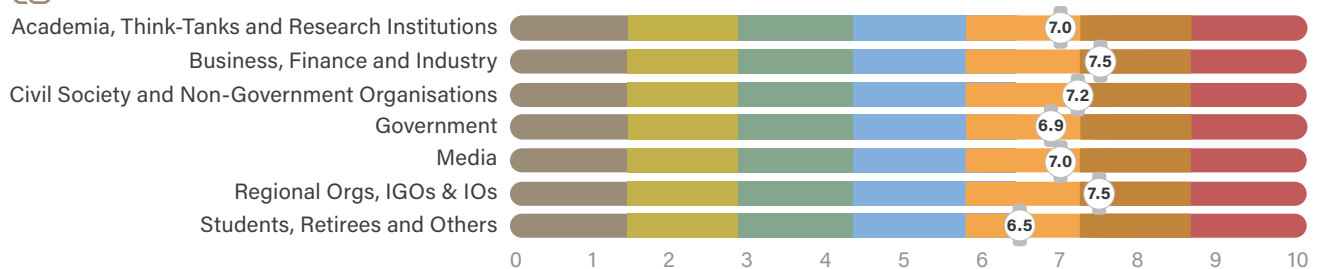
Respondents have expressed high levels of confidence in the positive impact of climate change policies on innovation and economic development. The average score on a scale of 0-10 across the region is 7.0, compared to 6.6 last year, which may be a result of successful development of solar and hydropower capacity in many Southeast Asian countries and ambitious plans by regional governments to invest in wind, geothermal and hydrogen projects (ASEAN Centre for Energy, 2020). The results of the survey also correspond to research that proposes that shifting from fossil fuels to clean energy will create a net increase in jobs (Garrett-Peltier, 2017) while contributing US\$12.5 trillion to Southeast Asia’s economy by 2070 (Deloitte, 2021).

Respondents in the Philippines (8.0), Vietnam (7.7) and Indonesia (7.6) have the highest levels of confidence in the positive economic impacts of climate policies. Respondents in Myanmar (5.0) and Brunei Darussalam (5.8) express a lower level of optimism. Respondents from business, finance and industry and regional organisations express the highest levels of confidence, while students, retirees and others are comparatively less optimistic, understandably as this affiliation category is not actively engaged in economic life. These findings show that although institutions at the national and international levels are convinced of the positive economic impacts of climate policies, such perceptions have not percolated communities.

Nationality

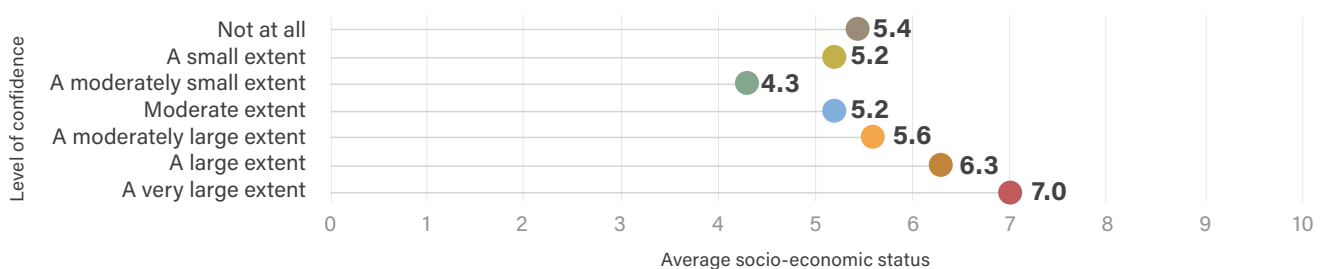


Affiliation



Results show that socio-economic status does not necessarily correlate to perceptions regarding economic impacts of climate policies. In some instances, people from a higher socio-economic status show less confidence, but there is a consistent increase in optimism about climate policies towards the top of the socio-economic spectrum.

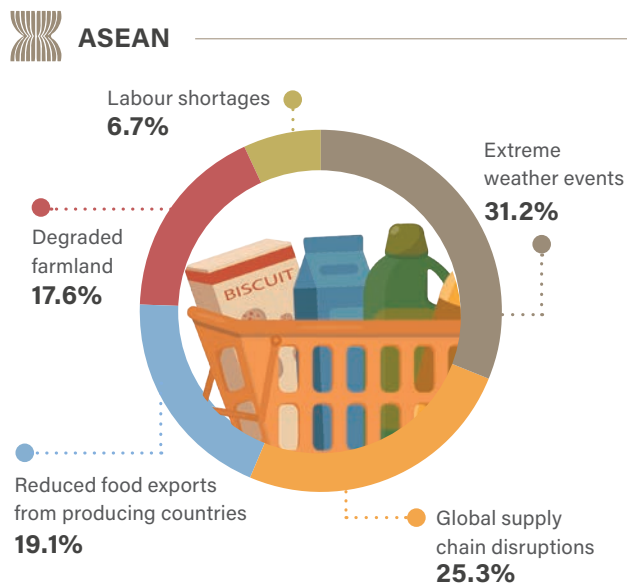
Socio-Economic Status



31 My country's food supply is mainly threatened by...

31.2% of Southeast Asians feel that their food supply is threatened by extreme weather events. Other significant threats identified by respondents are global supply chain disruptions (25.3%), reduced food exports (19.1%) and degraded farmlands (17.6%). Labour shortages received the lowest level of recognition as a threat (6.7%).

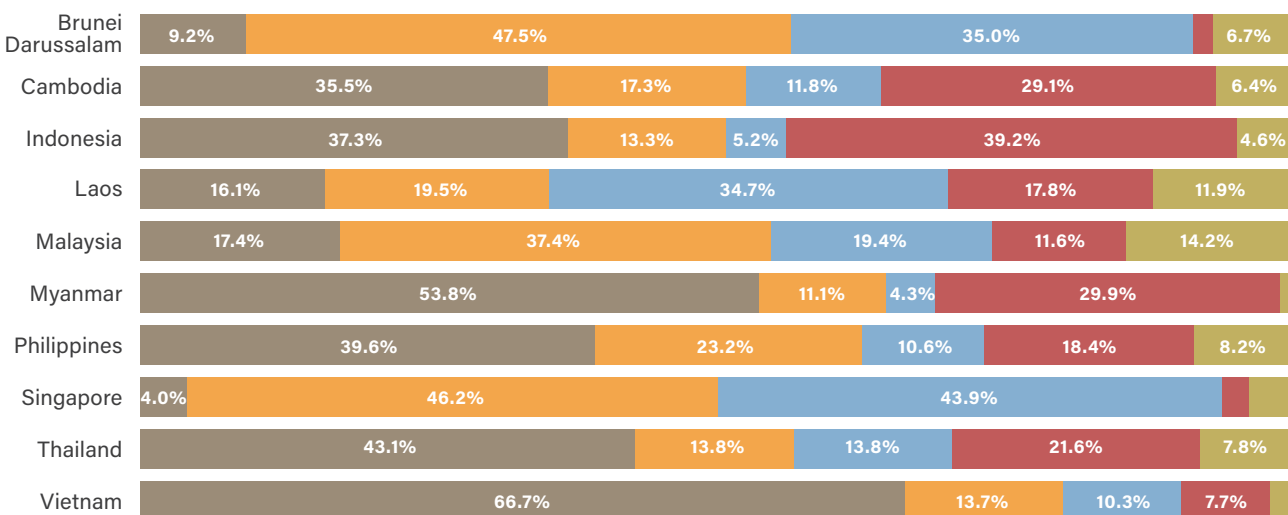
Threat perceptions vary between countries. In Vietnam (66.7%) and Myanmar (53.8%), extreme weather events are seen as very consequential for food supplies, while respondents from Singapore (46.2%) and Brunei Darussalam (47.5%) put more emphasis on global supply chains and reduced food exports. Degraded farmlands are seen as the greatest source of threat in Indonesia (39.2%). Respondents from Malaysia (14.2%) gave higher importance to labour shortages as compared to the rest of the region.



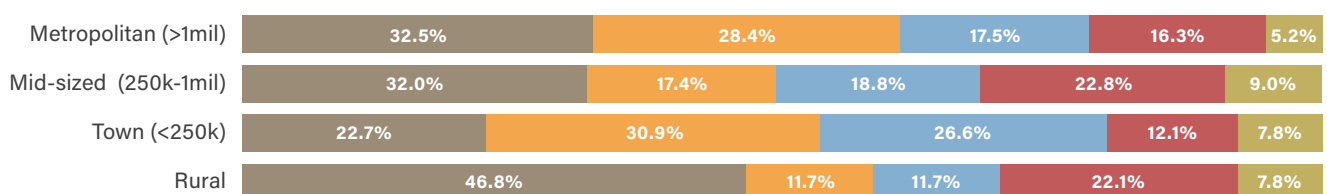
The type of city that respondents live in influences how threats to food supplies are categorised. Respondents in rural areas (46.8%) are most worried about the impact of extreme weather events. This finding resonates with the conclusions of the Food and Agricultural Organization's 2022 report, which categorises extreme weather events as the greatest threat to rural small-scale farmers (Food and Agriculture Organization, 2022).

While respondents in metropolitan areas, mid-sized cities and towns also give high importance to extreme weather events, they are worried about global supply chain disruptions and reduced food exports, which may indicate higher levels of consumption of processed and imported food in these locations. Although respondents in rural areas are less concerned about global supply chains, this is likely to change in the future, as consumption patterns of processed food are merging across urban and rural spaces (Vorley et al., 2015). Within the four categories, respondents from mid-sized cities and rural areas give higher importance to degraded farmlands.

Nationality

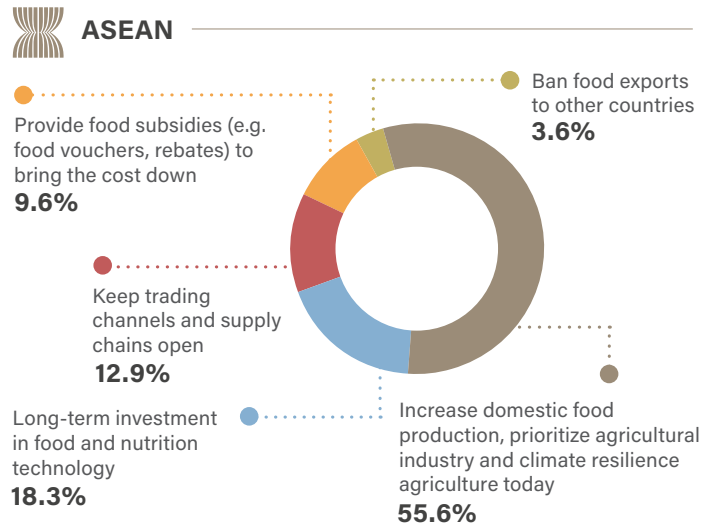


City Type



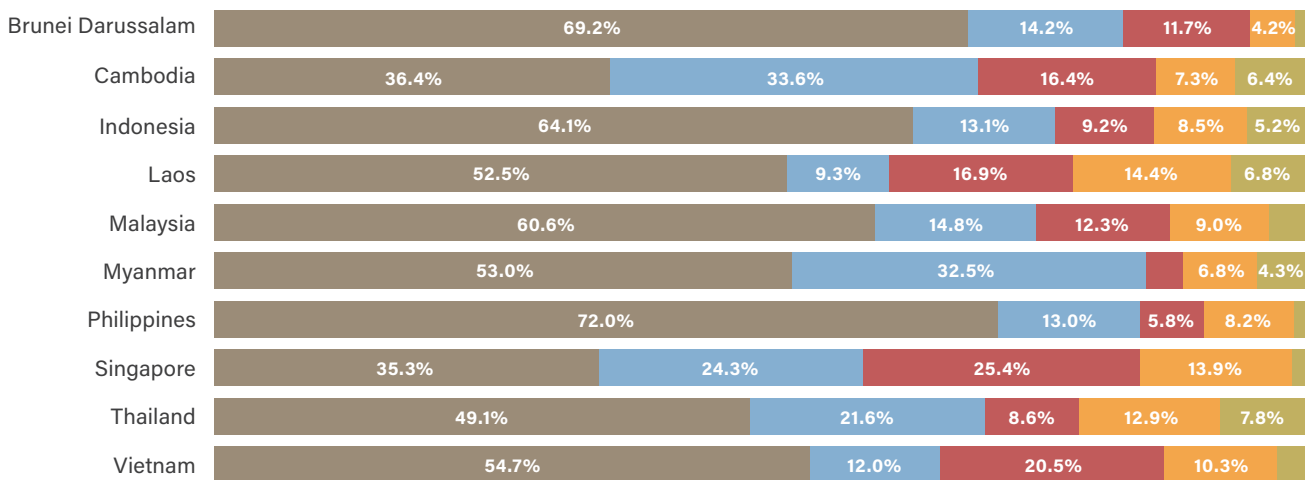
32 Global food security is currently affected by climate change, Russia-Ukraine war, and sustained inflation. What should be your government’s top priority in addressing this crisis?

Majority of Southeast Asians (55.6%) believe that governments should increase domestic food production, prioritise the agricultural industry and climate resilience in response to global food security challenges. 18.3% of respondents believe in long-term investments in food and nutrition technology while 12.9% believe that keeping trading channels and supply chains open are critical. Provision of food subsidies (9.6%) and banning of food exports to other countries (3.6%) are not prioritised. The domestic pressures for governments to adopt protectionist policies is high in a global food crisis but does not necessarily translate to lower prices that can beat inflation (Arifin and Wihardja, 2022).



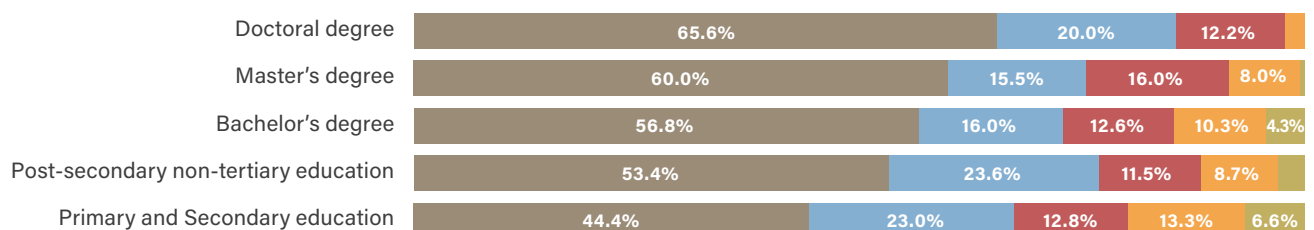
Agricultural policies received the highest level of approval among respondents in the Philippines (72.0%), followed by Brunei Darussalam (69.2%) and Indonesia (64.1%). Investments in food and nutrition technology is given the highest importance in Cambodia (33.6%) relative to the region. On the other hand, respondents in Singapore (25.4%) and Vietnam (20.5%) recognise the importance of policies that keep trade going and supply chains open.

Nationality



While respondents from all educational backgrounds are likely to prioritise policies on domestic food production and agricultural practices, the level of support for prioritisation in this area corresponds to the level of education, with better educated respondents expressing higher levels of support. Investment in food and nutrition technology receive high levels of importance from respondents with post-secondary education and below while those with Master’s degrees or equivalent recognise the importance of effective global supply chains. Conversely, those who receive basic levels of education tend to favour protectionist policies of banning food exports to other countries.

Education



SECTION V

PERCEPTIONS OF INTERNATIONAL CLIMATE COOPERATION

Pages

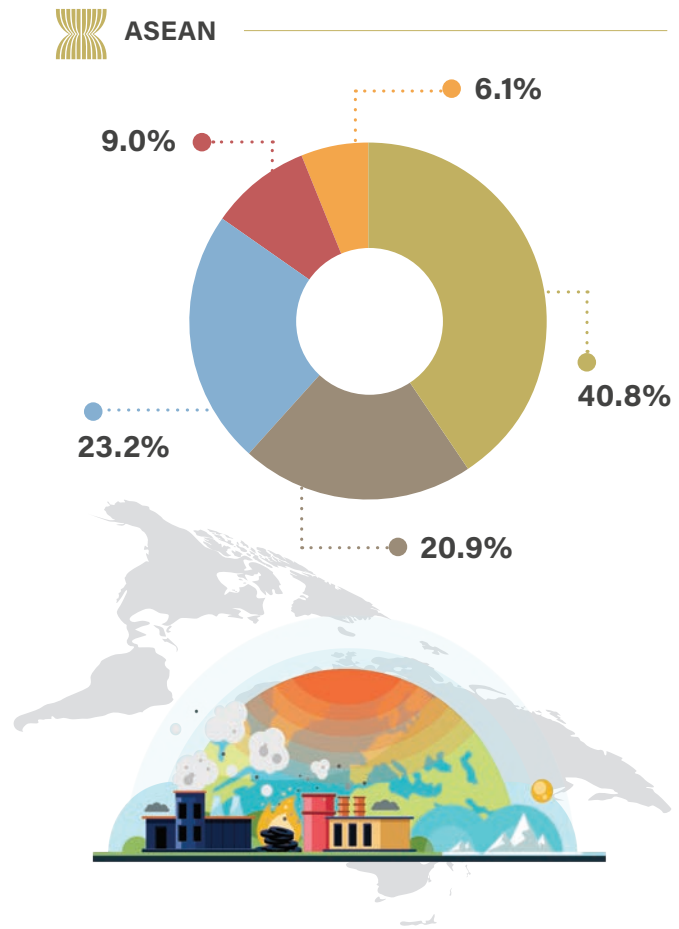
41-46



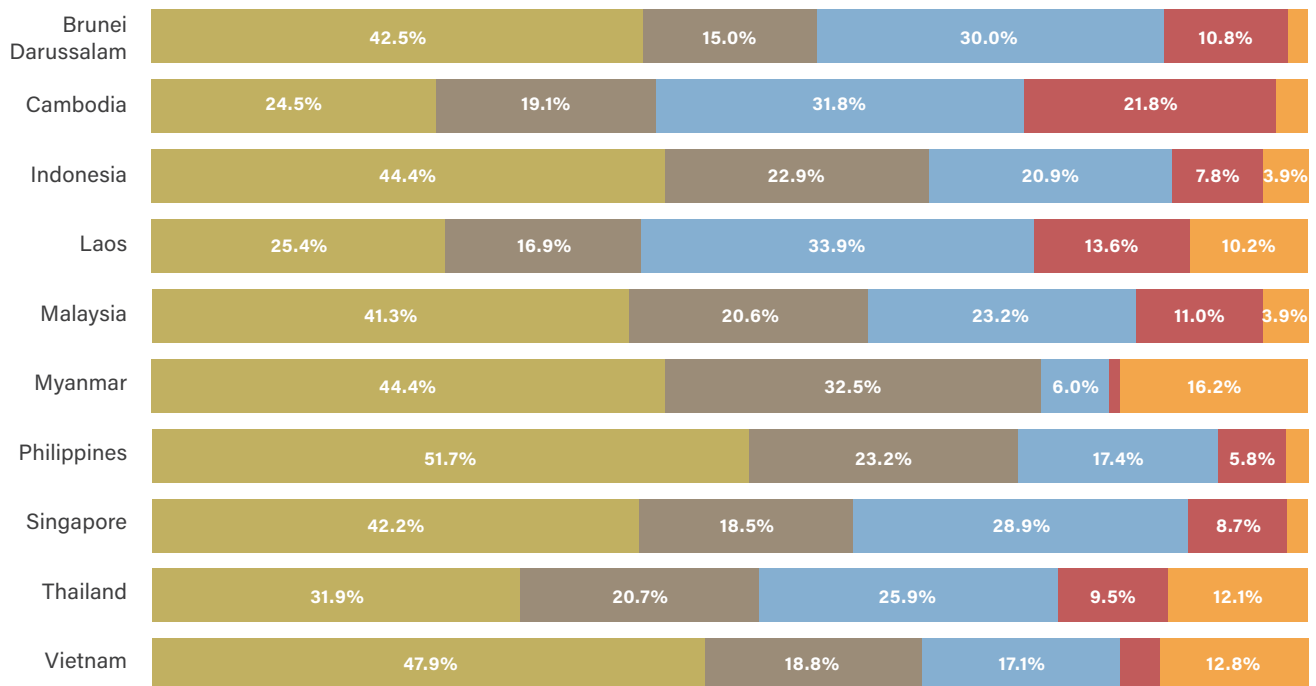
33 Which statement best reflects your views about your country's role in international climate action?

Across the region, the largest proportion of respondents believe that their countries contribute to climate change and need to step up efforts to help the world to decarbonise (40.8%). This view is most pronounced in the Philippines (51.7%). Again, the majority of Philippines respondents are found to be the most consistent in articulating the sense of urgency of climate change. In question 9, for instance, 64.3% of Philippine respondents believe that climate change poses a serious and immediate threat to the well-being of their country.

On the other end of the spectrum, however, the largest proportion of Laos (33.9%) and Cambodia (31.8%) respondents state that their countries did not cause climate change but need to play a more active role in the global green transition because it concerns their future. Cambodia (21.8%) and Lao (13.6%) respondents also express stronger support in needing international assistance to help with decarbonisation efforts. Also worth noting is Myanmar, whose respondents argue that while their country feels the impact of climate change, major emitters such as the US, China, and Europe must be responsible at much higher rates than other countries (32.5%).



Nationality

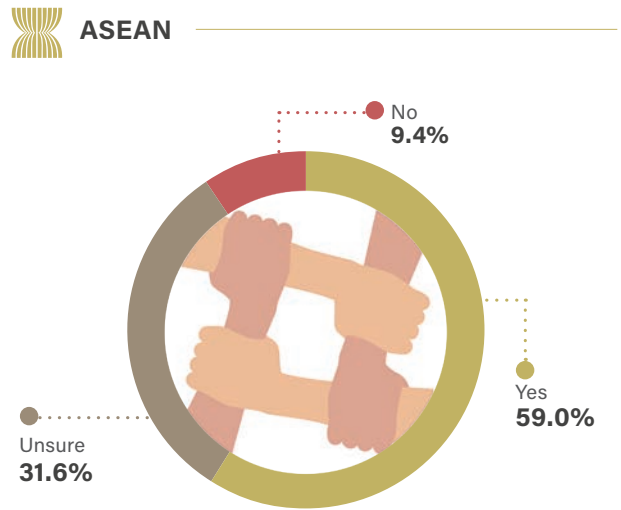


- My country contributes to climate change and needs to step up efforts to help the world to decarbonise
- My country feels the impact of climate change, major emitters such as the US, China, and Europe must be responsible
- My country did not cause climate change but needs to play a more active role in the global green transition because it concerns our future
- My country did not cause climate change but to help decarbonise, we need international assistance
- My country did not cause climate change and need not demonstrate climate action in international fora

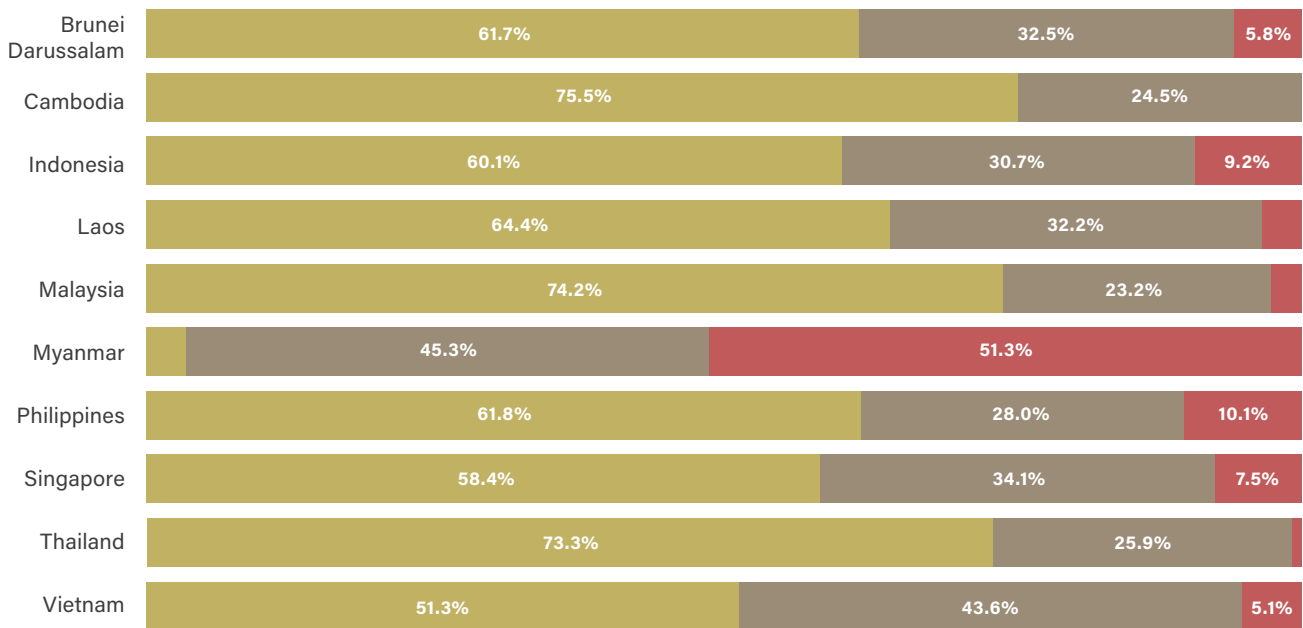
34 ASEAN's climate cooperation has been slow and ineffective. Do you agree that this is due to an absence of leadership?

Respondents are generally sceptical about ASEAN's role in climate cooperation. 59.0% of respondents think that ASEAN's climate cooperation has been slow and ineffective due to an absence of leadership. Only respondents from Myanmar (51.3%) think otherwise. Despite recent criticisms of ASEAN in its inability to fulfil its pledges or take meaningful steps in responding to the current humanitarian crisis in Myanmar, Myanmar respondents did not see an absence of leadership of ASEAN in climate cooperation.

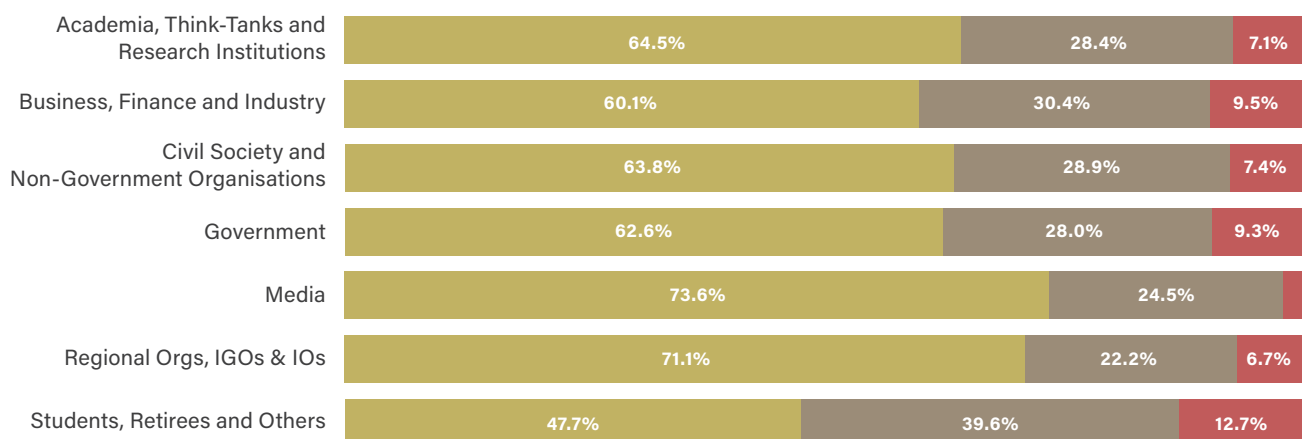
It is also worth noting that scepticism on ASEAN's climate leadership is most prevalent among those in media (73.6%), regional organisations, inter-governmental and international organisations (71.1%), and academia, think-tanks and research institution (64.5%).



Nationality



Affiliation



35 Which ASEAN country has potential to be the region’s climate leader?

53.0% of the region believe that Singapore has potential to be the regional climate leader followed by Indonesia at 11.1%. 8.8% of respondents would rather choose “None of the above” than cast their vote for a country.

Singapore is the top choice within every country except Indonesia, where 52.9% of Indonesia respondents choose their own country. 81.8% of Cambodia respondents choose Singapore, the highest among the ten countries while only 26.1% of Indonesia respondents choose Singapore, the lowest among the ten countries. In the votes cast for Indonesia, Malaysia respondents give it the highest voting at 12.3%.

Nationality

			None of the above								
ASEAN	53.0%	11.1%	8.8%	6.9%	5.3%	4.8%	3.5%	2.8%	2.4%	1.2%	0.2%
Brunei Darussalam	60.0%	11.7%	13.3%		1.7%	2.5%	10.0%	0.8%			
Cambodia	81.8%	1.8%		12.7%				0.9%			2.7%
Indonesia	26.1%	52.9%	6.5%	4.6%	0.7%	2.0%	5.9%	0.7%		0.7%	
Laos	52.5%	2.5%	12.7%	9.3%	9.3%	2.5%	0.8%		0.8%	9.3%	
Malaysia	47.7%	12.3%	10.3%	2.6%		1.9%	7.7%	17.4%			
Myanmar	66.7%	0.9%	0.9%	2.6%	0.9%	0.9%			26.5%	0.9%	
Philippines	49.8%	5.3%	8.7%	4.3%	25.6%	2.4%	1.4%	2.4%			
Singapore	60.7%	9.8%	17.3%	3.5%	0.6%	3.5%	4.0%	0.6%			
Thailand	42.2%	4.3%	11.2%	33.6%	1.7%	0.9%	1.7%	1.7%	0.9%	1.7%	
Vietnam	53.0%	0.9%	2.6%	2.6%	1.7%	35.9%	1.7%	0.9%		0.9%	

Among affiliations, 58.8% and 58.3% respectively of respondents from governments, students, retirees and others choose Singapore. Indonesia enjoys more confidence from 18.3% of respondents from academia and 15.6% from regional, inter-government and international organisations.

Affiliation

			None of the above								
Academia, Think-Tanks and Research Institutions	50.3%	18.3%	10.7%	4.1%	2.5%	4.1%	3.0%	4.1%	0.5%	2.5%	
Business, Finance and Industry	49.4%	12.5%	8.2%	8.4%	5.4%	7.4%	4.3%	3.1%	1.3%		
Civil Society and Non-Government Organisations	50.3%	12.1%	11.4%	8.7%	6.0%	2.0%	4.0%	2.0%	1.3%	2.0%	
Government	58.8%	9.3%	10.4%	6.0%	6.0%	2.7%	1.1%	4.9%	0.5%		
Media	49.1%	13.2%	9.4%	3.8%	9.4%	5.7%	1.9%	5.7%		1.9%	
Regional Orgs, IGOs & IOs	44.4%	15.6%	8.9%	6.7%	8.9%	4.4%	4.4%	2.2%		4.4%	
Students, Retirees and Others	58.3%	5.4%	6.5%	7.0%	4.9%	4.6%	3.8%	0.8%	6.5%	1.4%	0.8%

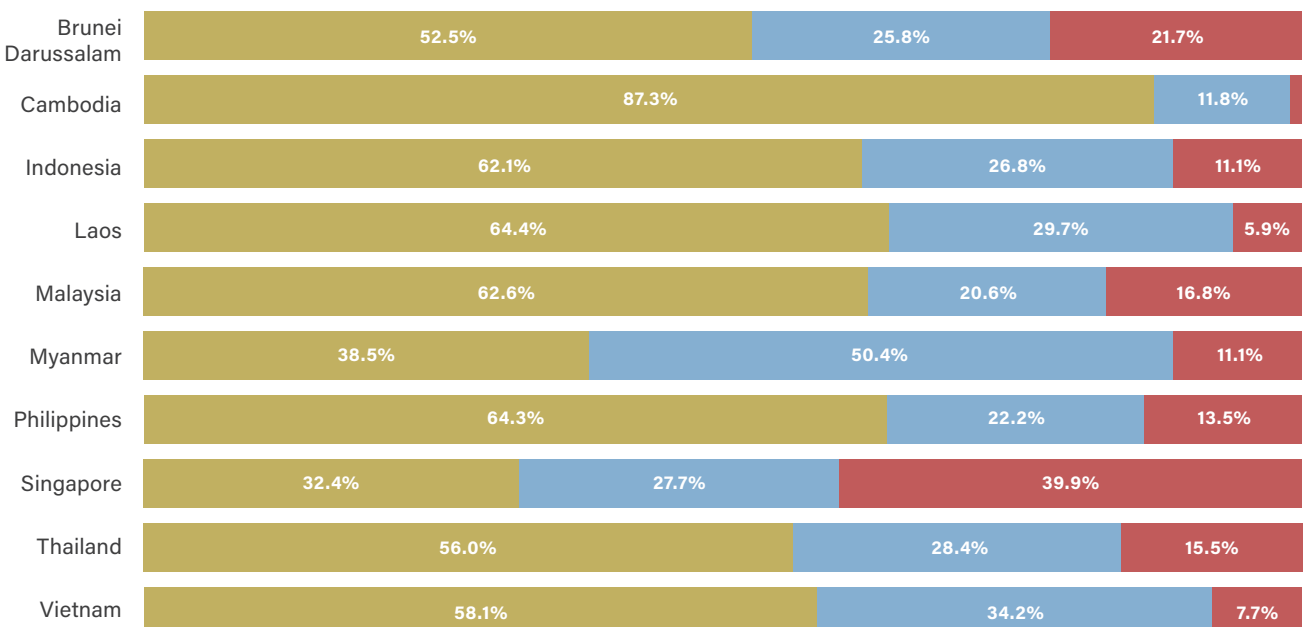
36 "Without international financial assistance, my country cannot meet its climate targets and transition to a low carbon economy." Do you agree?

Across ASEAN, 57.3% of respondents say that without international climate assistance, their country cannot meet its climate targets and transition to a low carbon economy. This view is most pronounced among Cambodia (87.3%), Laos (64.4%), and Philippines (64.3%) respondents. Only respondents from Singapore and Myanmar hold a different view. 39.9% of Singapore respondents disagree with the question, signifying a high level of confidence that their country can meet their climate pledges without international support. Meanwhile, more than half of Myanmar respondents are unsure in their response.

ASEAN



Nationality











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

The EU remains the most popular middle power thought to have demonstrated global climate leadership (21.9%) dropping from 30.7% the year before. The EU is closely followed by the US whose ratings improved drastically since its re-engagement in the Paris Agreement from 4.8% in 2021 to 20.7% this year. Japan comes in third at 16.9%, dropping slightly from 19.3% last year. The percentage of climate leadership sceptics that do not view any country as a climate leader dropped from 26.1% last year to 16.5%.









China ranks 5th among the choices at 9.5% after those who choosing “None of the above”. Interestingly, China is Myanmar’s top choice at 28.2%, almost triple the ASEAN average for China.

Nationality

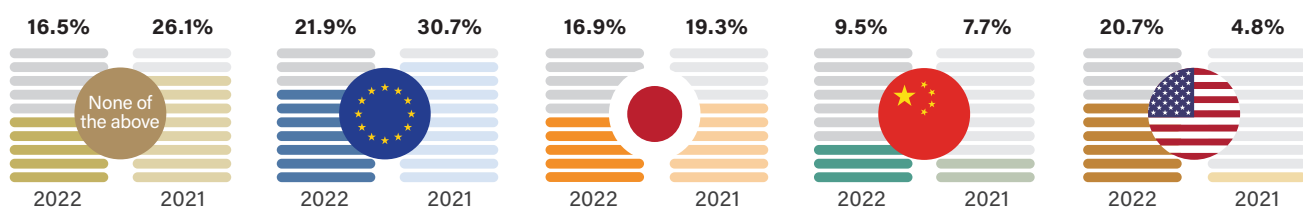
				None of the above					
ASEAN	21.9%	20.7%	16.9%	16.5%	9.5%	5.8%	4.5%	2.5%	1.7%
Brunei Darussalam	21.7%	10.8%	20.8%	25.0%	1.7%	10.0%	4.2%	5.0%	0.8%
Cambodia	36.4%	54.5%		0.9%	7.3%		0.9%		
Indonesia	30.1%	8.5%	20.9%	22.2%	7.8%	5.2%	2.0%	3.3%	
Laos	8.5%	23.7%	29.7%	10.2%	14.4%	5.1%	5.1%	3.4%	
Malaysia	20.6%	8.4%	21.9%	20.0%	11.0%	9.7%	3.2%	4.5%	0.6%
Myanmar	0.9%	26.5%	10.3%	2.6%	28.2%	4.3%	11.1%		16.2%
Philippines	21.3%	18.8%	28.0%	15.5%	2.9%	6.8%	3.9%	2.9%	
Singapore	22.5%	11.0%	8.1%	37.6%	6.9%	4.6%	7.5%	1.2%	0.6%
Thailand	21.6%	23.3%	14.7%	12.9%	12.1%	7.8%	6.0%	0.9%	0.9%
Vietnam	34.2%	37.6%	6.0%	5.1%	9.4%	2.6%	1.7%	3.4%	

Notably, the EU is the top choice among Doctoral degree holders (41.1%), while the US is rated most favourably by those with primary and secondary levels of education (32.1%). The higher the level of educational attainment, the higher the levels of scepticism. Doctoral and Master’s degree holders are more likely to take the view that no country has demonstrated leadership.

Education

				None of the above					
Doctoral degree	41.1%	8.9%	12.2%	26.7%	3.3%	4.4%	1.1%	2.2%	
Master’s degree	26.5%	9.0%	16.0%	28.5%	7.0%	6.5%	3.5%	3.0%	
Bachelor’s degree	20.5%	22.8%	21.0%	15.0%	8.1%	5.5%	3.5%	2.7%	0.9%
Post-secondary non-tertiary education	16.3%	19.2%	13.9%	12.0%	13.0%	8.7%	11.1%	1.9%	3.8%
Primary and Secondary education	18.9%	32.1%	8.7%	9.7%	16.3%	3.6%	4.1%	2.0%	4.6%

Year



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

Although the EU is deemed a climate leader, the expectations in the region seem to point towards Japan as possessing the ability to proactively share their climate expertise, practical ability and technical know-how at 23.5% whereas only 17.6% of respondents thought the EU could fulfil this role. The second-ranked country that the region look to is the US at 23.1%. Cambodia respondents have the strongest preference for the US (53.6%) while China is more popular among Laos and Myanmar respondents (27.1% and 23.1% respectively).

Nationality

					None of the above				
ASEAN	23.5%	23.1%	17.6%	13.2%	8.9%	5.1%	4.5%	2.3%	1.8%
Brunei Darussalam	27.5%	18.3%	10.0%	7.5%	13.3%	8.3%	10.0%	5.0%	
Cambodia	0.9%	53.6%	33.6%	10.0%		0.9%		0.9%	
Indonesia	24.2%	16.3%	19.0%	14.4%	15.0%	2.6%	5.9%	2.6%	
Laos	25.4%	16.1%	11.0%	27.1%	9.3%	5.9%	3.4%	0.8%	0.8%
Malaysia	33.5%	15.5%	15.5%	14.8%	7.7%	5.2%	3.2%	3.2%	1.3%
Myanmar	21.4%	18.8%	3.4%	23.1%		13.7%	3.4%	0.9%	15.4%
Philippines	32.9%	20.3%	17.9%	7.7%	6.8%	4.3%	5.8%	3.4%	1.0%
Singapore	16.8%	22.5%	20.8%	11.6%	17.3%	4.6%	4.6%	1.2%	0.6%
Thailand	18.1%	26.7%	13.8%	16.4%	10.3%	3.4%	7.8%	2.6%	0.9%
Vietnam	25.6%	31.6%	30.8%	3.4%	4.3%	2.6%		1.7%	

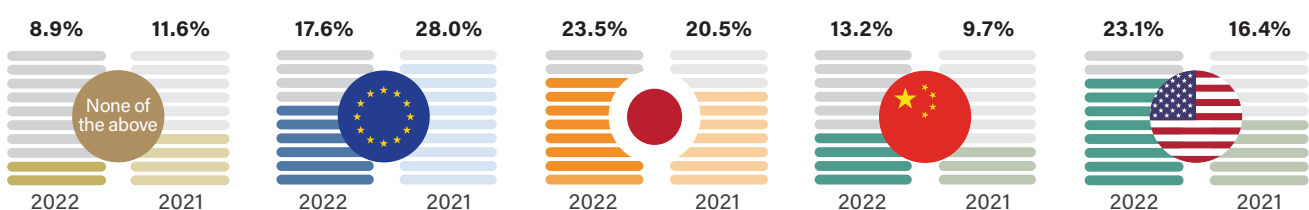
Across affiliations, government and civil society respondents are most likely to choose Japan (30.8% and 28.9% respectively), while those in academia favour the EU (27.9%).

Affiliation

					None of the above				
Academia, Think-Tanks and Research Institutions	19.3%	16.2%	27.9%	15.7%	9.1%	3.6%	4.6%	2.5%	1.0%
Business, Finance and Industry	22.0%	23.5%	15.6%	14.8%	9.0%	4.3%	6.1%	3.1%	1.5%
Civil Society and Non-Government Organisations	28.9%	19.5%	19.5%	12.8%	11.4%	4.7%	2.0%	1.3%	
Government	30.8%	24.2%	9.9%	11.5%	9.9%	5.5%	4.4%	3.3%	0.5%
Media	20.8%	28.3%	18.9%	11.3%	9.4%	5.7%	5.7%		
Regional Orgs, IGOs & IOs	24.4%	20.0%	24.4%	8.9%	8.9%	2.2%	6.7%	2.2%	2.2%
Students, Retirees and Others	22.0%	26.8%	16.3%	11.9%	7.0%	6.8%	3.5%	1.6%	4.1%

Compared to last year's survey, the proportion of respondents choosing the EU dipped by 10.4%, while China, the US and Japan grew slightly in popularity.

Year



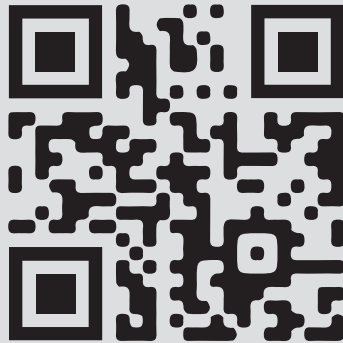
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Thank you

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

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



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