



SOUTHEAST ASIA CLIMATE OUTLOOK:
2020 SURVEY REPORT

The Southeast Asia Climate Outlook: 2020 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.

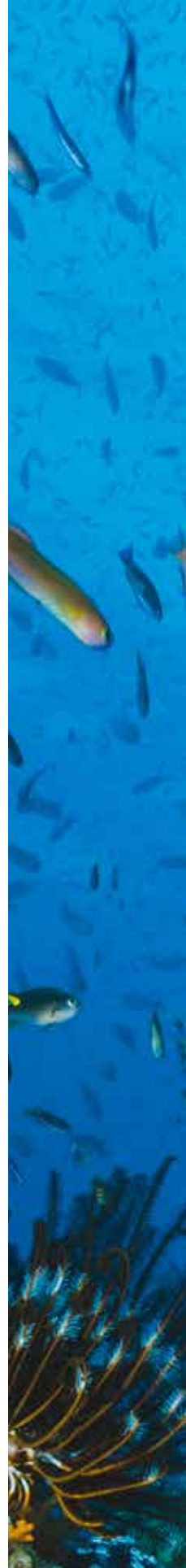
The Climate Change in Southeast Asia Programme (CCSEAP) was established in 2020 to examine the phenomenon of climate change, its impact, and policy responses across the regions. The Programme hopes to cultivate a network of scholars at the forefront of climate change research and build on ISEAS' thought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

Climate change ranked among Southeast Asia's top three security concerns in the annual *State of Southeast Asia Survey 2020* conducted by the ASEAN Studies Centre at the ISEAS-Yusof Ishak Institute. All ASEAN countries, with the exception of Myanmar, placed climate change above terrorism, the region's traditional security threat. This finding was further corroborated by 52.7% of respondents viewing climate change as a "serious and immediate threat to the well-being" of the region.

Picking up from where the annual *State of Southeast Asia Survey* left off, the Climate Change in Southeast Asia Programme at ISEAS-Yusof Ishak Institute decided to conduct a Southeast Asia Climate Outlook 2020 Survey from 3 August 2020 to 18 September 2020. The survey was designed to analyse the attitudes and concerns of Southeast Asian citizens towards climate change, governmental actions and the role of different stakeholders in climate action.

The survey, comprising 30 questions in total, was also designed to draw views on climate change impacts, mitigation, adaptation, food security, agricultural production, cities' adaptation measures, renewable energy and the transition to low-carbon economies.

The survey which was conducted online successfully drew a total of 502 respondents from all ten ASEAN member states. Those respondents represented 7 groups: (1) Academia, Think-tanks, and Research Institutions, (2) Business, Finance, and Industry (3) Civil Society, NGOs, and Media, (4) Government (5) Regional Organisations, Inter-Government, and International Organisations, (6) Students, (7) Others; Retirees and persons without affiliation. Only Southeast Asian citizens were allowed to participate in this survey. The survey was promoted through various communication channels including direct email and social media in order to draw participation of the elite policymakers and non-elite groups.

Highlights at a Glance

The survey findings are by no means representative of Southeast Asia's views on climate change but these findings act as a barometer of general views and attitudes of Southeast Asian citizens.

The survey comprises six sections:



1 Respondents' Profile



4 Perceptions of Energy, Food Security and Cities



2 Perceptions of Climate Change Issues



5 Perceptions of Nationally Determined Contributions (NDCs) & Climate Governance



3 Perceptions of Climate Policy



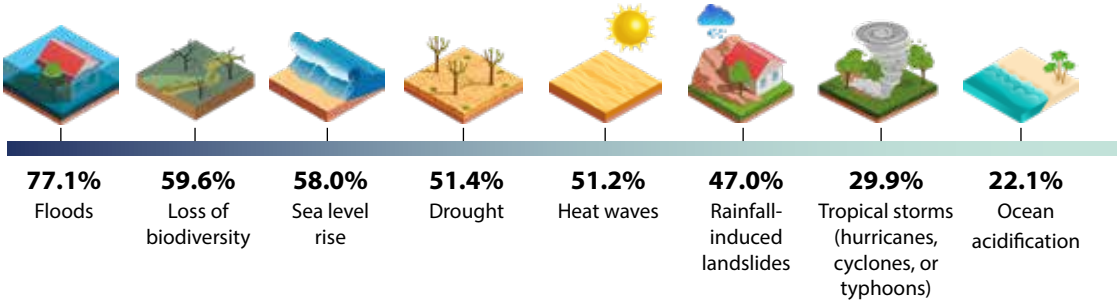
6 Perceptions of Regional Cooperation

Top three climate change impacts in ASEAN

Floods, loss of biodiversity, and sea level rise are the top three climate change impacts in ASEAN.

Evidently, these impacts are top of mind among respondents as they deal with the effects.

In your view, what are the most serious climate change impacts that your country is currently exposed to?



ASEAN youth advocacy promising

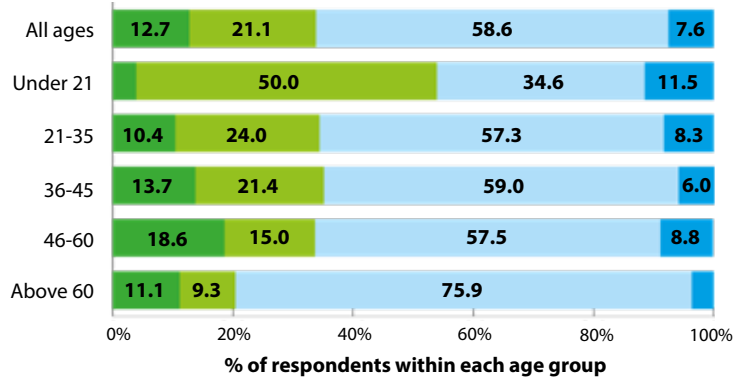
ASEAN youths are more likely than any other age groups to be actively engaged in climate advocacy.



53.9%

of respondents under the age of 21 are involved in leading a project, mobilising support or attending environment-related seminars.

Which of the following statements best describes your level of participation in climate advocacy?



Response

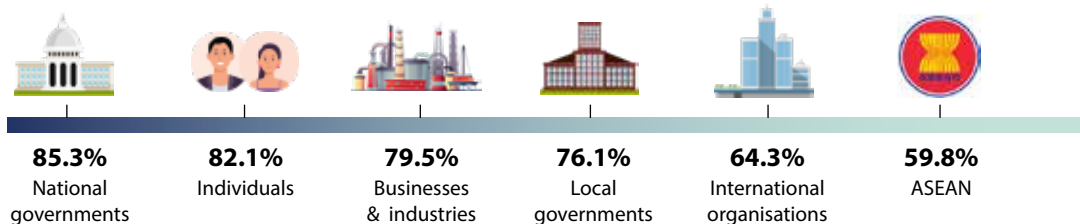
- I don't participate in and follow climate change issues
- I follow news and share information about climate change
- I join climate movement groups and attend seminars on environment-related issues
- I lead a project and mobilise support on climate change awareness



Responsibility for addressing climate change

National governments, individuals, and business and industries should be responsible for tackling climate change.

Who, in your opinion, is responsible for tackling climate change?

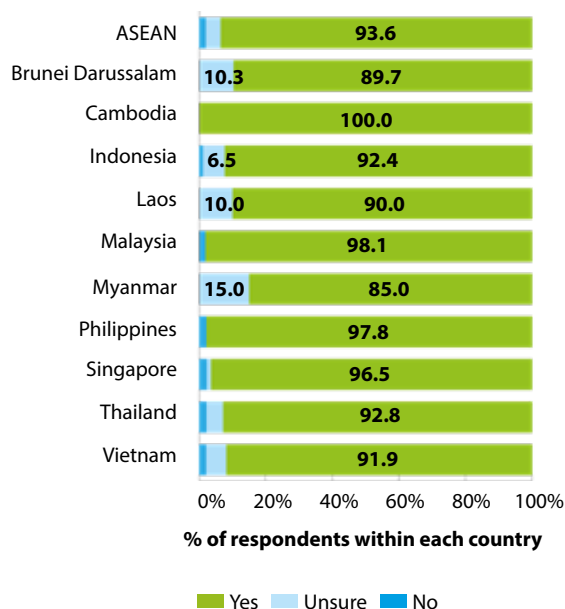


Private sector has a role to play

93.6% of ASEAN respondents believe that the private sector can play an important role in addressing climate change by committing to green supply chain practices, promoting sustainable practices, and providing green investment and financing.

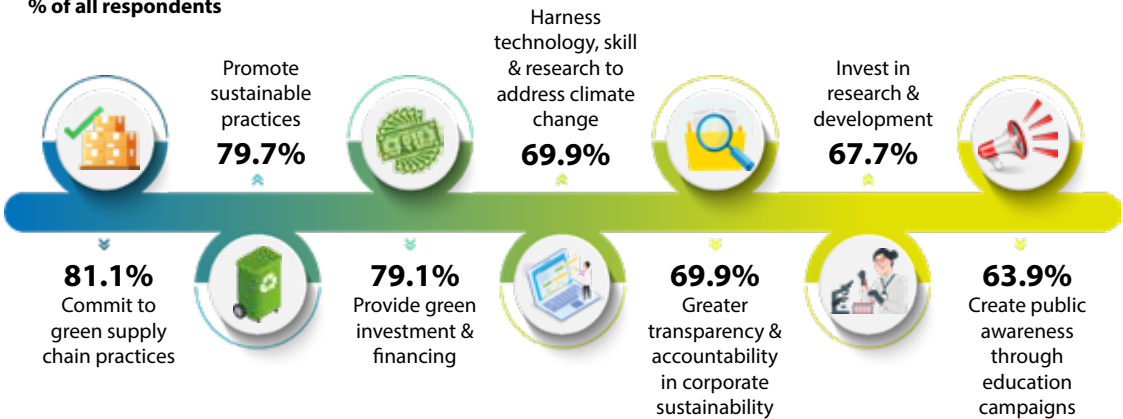


Do you think the private sector has a role to play in addressing climate change effects?



What do you think the private sector can do?

% of all respondents

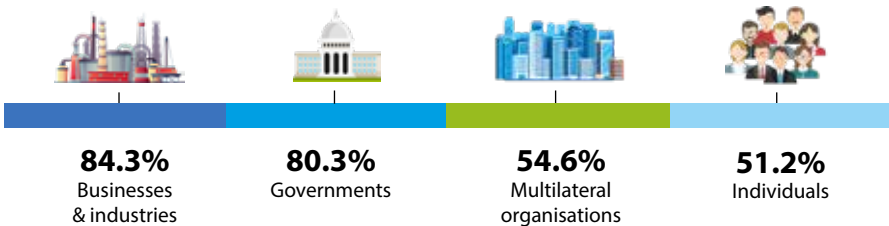


Cost of climate measures

Businesses and industries and governments should bear the cost of climate measures.

In your opinion, who should bear the costs of climate change measures?

% of respondents within each country

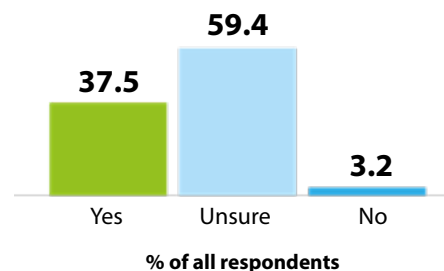


Awareness of national climate policy is low

Awareness of Southeast Asian countries' Nationally Determined Contributions (NDCs) to the Paris Agreement is low among respondents. This indicates a lack of awareness regarding their country's climate policy. There is room for governments to raise awareness through public consultation and education.



Has your country submitted a Nationally Determined Contribution (NDC) under the Paris Agreement?



Effectiveness of ASEAN divided

Respondents are divided over whether ASEAN is effective as a regional organisation in tackling climate change.

ASEAN is working together effectively to tackle climate change. Do you agree?



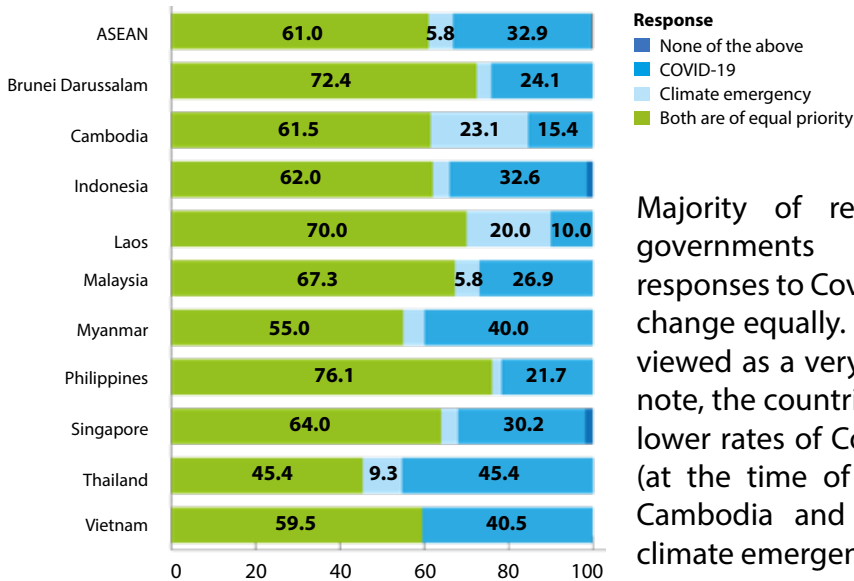
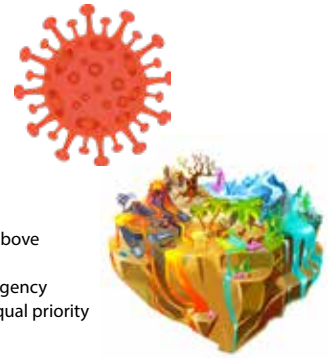
31.3%
Agree

35.9%
Neither agree
or disagree

32.9%
Disagree

Covid-19 and climate crisis of equal importance

Which of the crises - Covid-19 or the climate emergency - should governments prioritise?

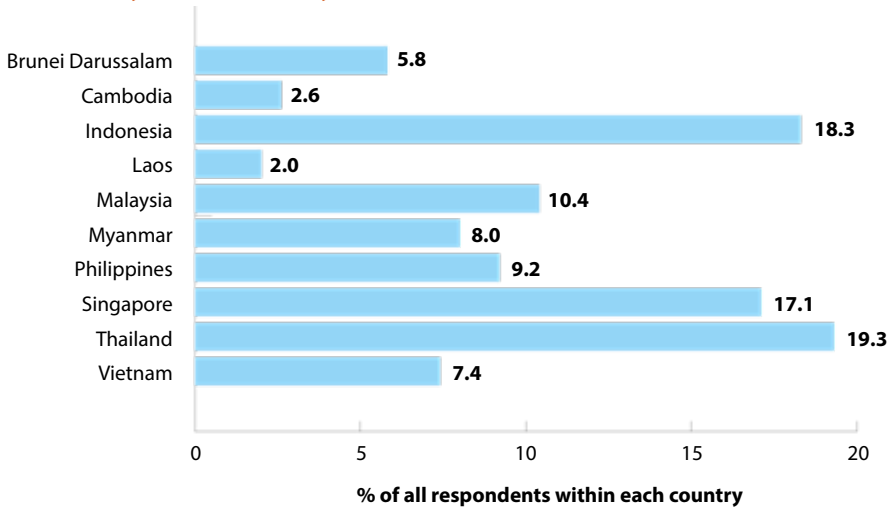


Majority of respondents want governments to prioritise responses to Covid-19 and climate change equally. Climate change is viewed as a very current crisis. Of note, the countries that have seen lower rates of Covid-19 infections (at the time of writing), namely Cambodia and Laos, prioritised climate emergency over Covid-19.



Section I: Respondents' Profile

1. What is your nationality?

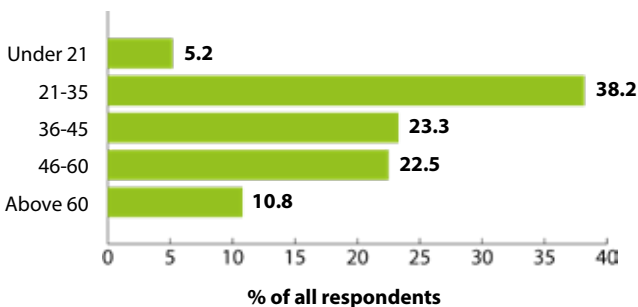


Among the ten ASEAN member states that participated in this survey, Thailand had the highest number of respondents at 19.3%, followed closely by Indonesia and Singapore with 18.3% and 17.1% respectively. This is followed by Malaysia (10.4%), Philippines (9.2%), Myanmar (8.0%), Vietnam (7.4%), Brunei Darussalam (5.8%), Cambodia (2.6%) and Laos (2.0%).

19.3%
Thailand had the highest number of respondents

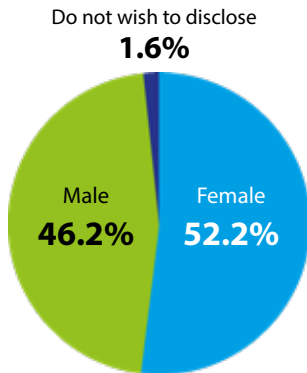


2. What age group do you belong to?



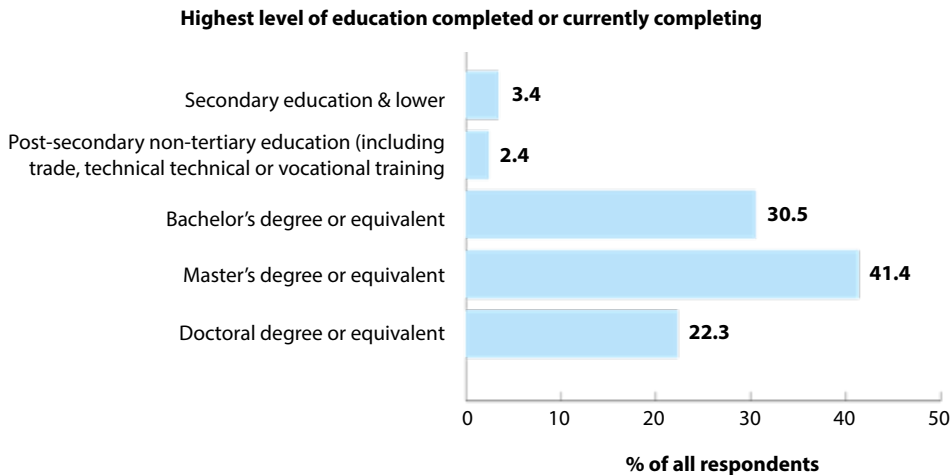
The survey drew participation from five age groups: (a) Under 21, (b) 21-35, (c) 36-45, (d) 46-60 and (e) Above 60. The majority of respondents were youths aged 21-35 (38.2%), followed by respondents aged 36-45 (23.3%), 46-60 (22.5%) and above 60 (10.8%). Youths under 21 made up the smallest group (5.2%).

3. What is your gender?



This survey saw a slightly greater response from women (52.2%) than men (46.2%), with a difference of 6.0% between the two genders.

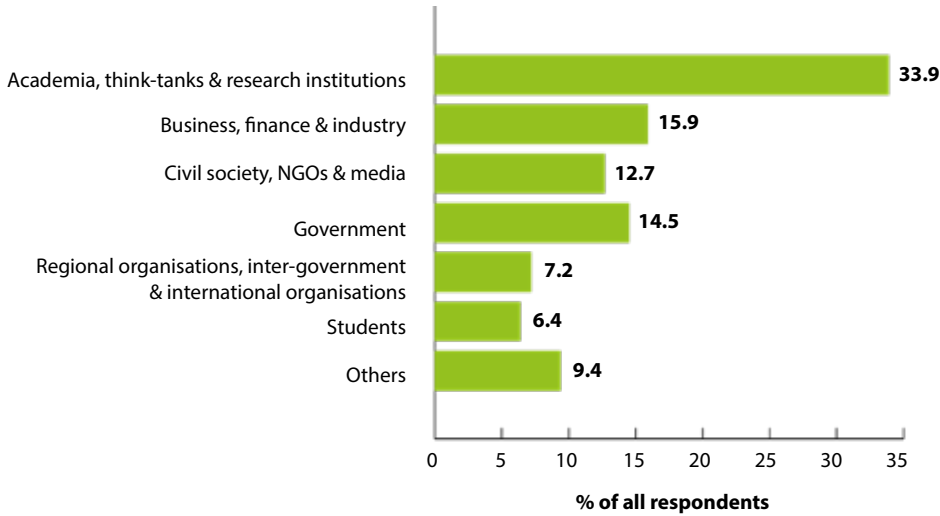
4. What is the highest level of education you have completed or are currently completing?



Majority of the respondents had a Bachelor's degree qualification or higher (94.2%). Master's degree holders were the most represented (41.4%), while those with post-secondary non-tertiary education were the least represented (2.4%).



5. What is your affiliation?



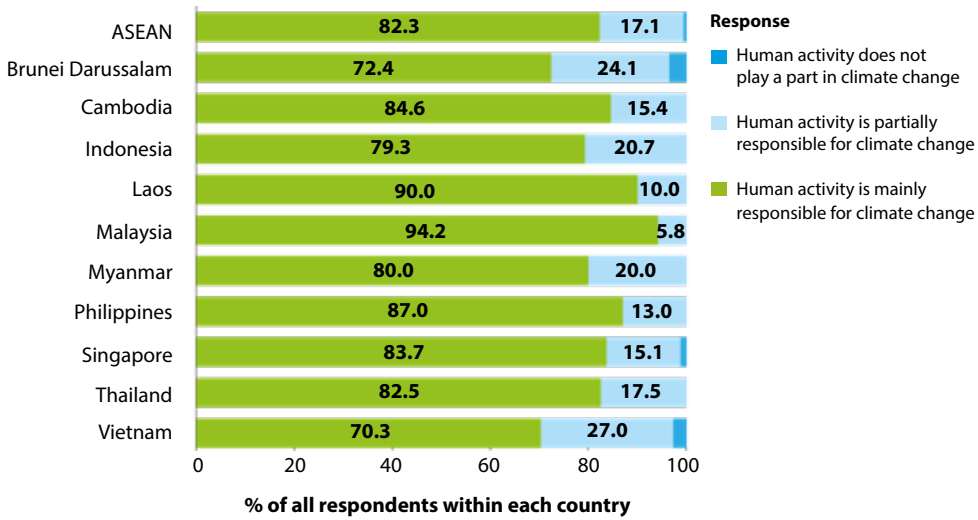
Academics and think tanks made up by far the largest group of respondents by affiliation (33.9%). Business communities, governments, and civil society organisations made up the next largest segments comprising 15.9%, 14.5%, and 12.7% of respondents respectively.





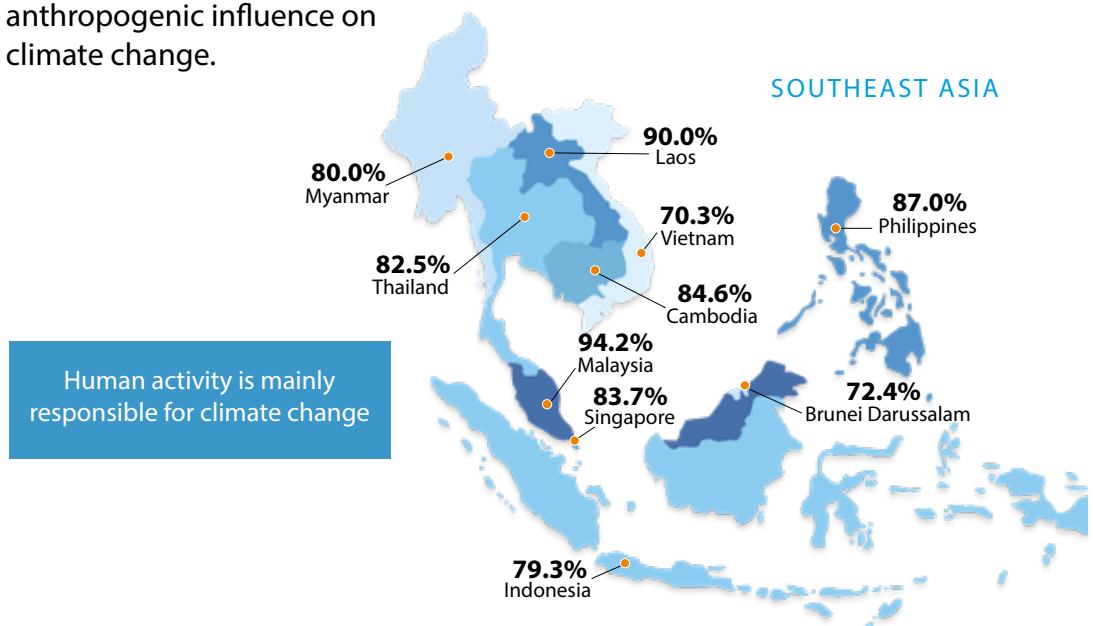
Section II: Perceptions of Climate Change Issues

6. Thinking of climate change, which of the following statements best describes your view?

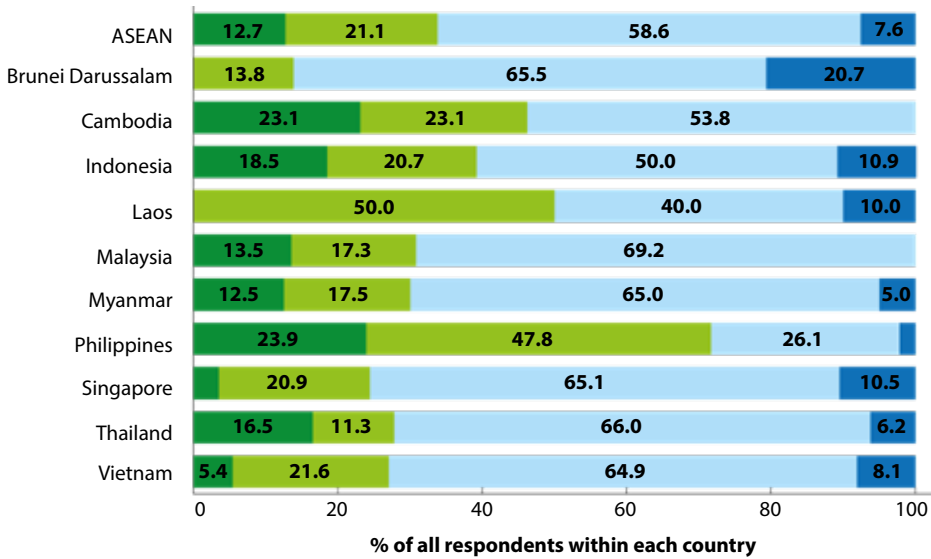


Majority of respondents at 82.3% felt that human activity is mainly responsible for climate change. A minority of 17.1% felt that human activity was only partially responsible for climate change, and a smaller minority of 0.6% felt that human activity did not play a part in climate change.

There is a slight variation in opinion between countries; for example, 94.2% of Malaysian respondents felt that human activity is mainly responsible for climate change, the highest of any ASEAN country. Only Brunei, Singapore and Vietnam had some respondents that did not feel human activity was at all responsible for climate change, while the rest of the countries agreed unanimously on the anthropogenic influence on climate change.



7. Which of the following statements best describe your level of participation in climate advocacy?



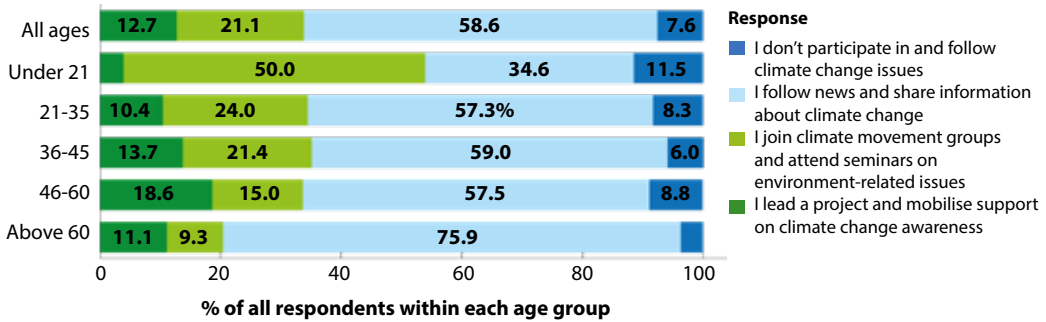
Response

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

Among all respondents, 33.8% stated that they participate in climate advocacy activities by leading a project and mobilising support on climate change awareness or joining climate movement groups and attending seminars on environment-related issues (in green). The majority adopt a more passive approach (in blue), either not participating at all, or only following and sharing climate news. The latter is the most popular option overall as it is chosen by 58.6% of respondents.

These patterns of climate advocacy vary between countries. Respondents from the Philippines are by far the most active (71.7%), both in terms of leading projects and joining movements. 50.0% of Laos respondents are active, all of which are involved in climate movements and seminars. 46.2% of Cambodia respondents are active, with 23.1% acting as leaders and mobilisers in climate advocacy. Respondents from Brunei are the least active with 20.7% who do not participate or follow climate news.

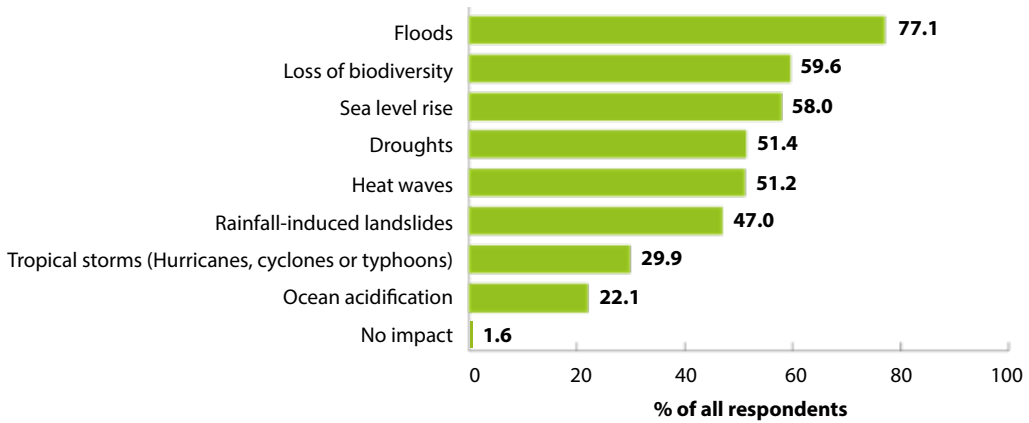
Levels of participation by age



There are also notable variations in climate advocacy between age groups. ASEAN youths (under 35) are more likely to participate actively in climate advocacy than other age groups, either through joining climate movements and attending seminars, or taking leadership in mobilising climate change awareness and other climate-related projects. This is especially true for Generation Z respondents under the age of 21, 53.9% of whom are active advocates — the highest proportion among all age groups by a wide margin. Most of them are participants in climate movements and seminars, but 3.9% of them are also young leaders. This number jumps from 3.9% to 10.4% for older youths aged between 21 and 35 (which includes most of Generation Y), steadily increasing with age before dropping to 11.1% for baby boomers above 60. The latter is mostly passive, with 79.6% either following and sharing climate news or staying uninvolved.



8. In your view, what are the most serious climate change impacts that your country is currently exposed to?

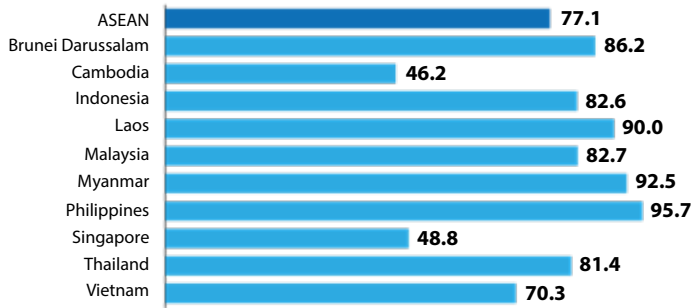


The top three climate change impacts that respondents are concerned about are: floods (77.1%), loss of biodiversity (59.6%) followed by sea level rise (58.0%). These are followed by droughts and heat waves (51.4% and 51.2%), rainfall-induced landslides (47.0%) and tropical storms (29.9%); which means all of the impacts listed draw concern from at least a third of all respondents. Only 1.6% of respondents indicated that there are no significant climate change impacts on their country.

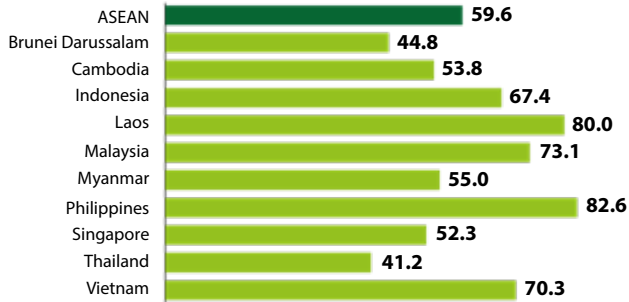


Most serious climate change impacts by country

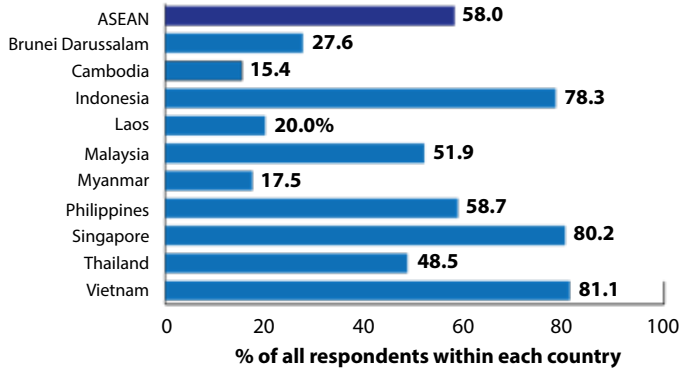
FLOODS



LOSS OF BIODIVERSITY



SEA LEVEL RISE

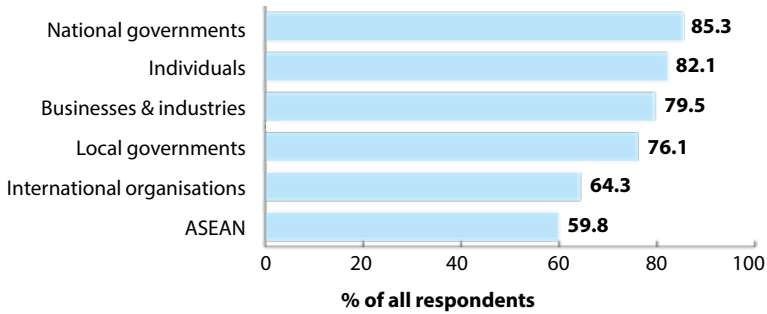


Focusing on the top three most serious climate change impacts, floods are a major concern for all countries except Cambodia and Singapore. For loss of biodiversity, Indonesia, Laos, Malaysia, Philippines and Vietnam were more concerned than the average ASEAN country (over 59.4%). Meanwhile, sea level rise had the greatest variation in concern between countries. Only 20.0% or fewer of respondents from Cambodia, Myanmar and landlocked Laos, were concerned. Meanwhile, a higher proportion of respondents from coastal states such as Indonesia, Philippines, Singapore and Vietnam felt it was serious (over ASEAN's average of 58.2%).



Section III: Perceptions of Climate Policy

9. Who, in your opinion, is responsible for tackling climate change?

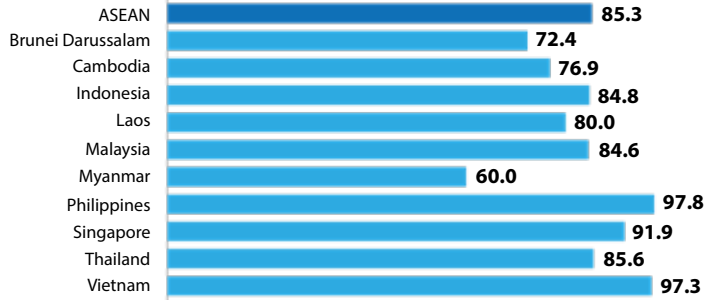


National governments (85.3%) and individuals (82.1%) have been given almost the same level of responsibility for tackling climate change by respondents, followed by businesses and industries (79.5%) and local governments (76.1%). Meanwhile, international organisations (64.3%) and ASEAN (59.8%) were attributed with the least levels of responsibility comparatively.

Most countries generally agree that national governments bear the responsibility to tackle climate change, with the exception of Myanmar (60.0%) which directed climate responsibility more towards businesses and industries (62.5%) and individuals (80%). There also appears to be a division of opinion within Cambodia, Laos and Myanmar, in which only around 60 to 62.5% of respondents selected businesses and industries. However, respondents from all countries agree on the fact that individuals are one of the responsible players in climate change.



NATIONAL GOVERNMENTS



BUSINESSES & INDUSTRIES



INDIVIDUALS

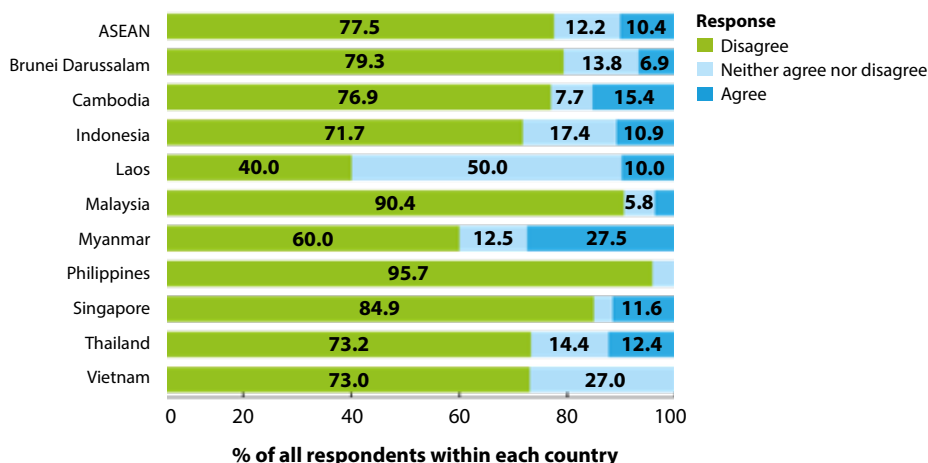


0 20 40 60 80 100

% of all respondents within each country



10. “Not much more can be done to reduce carbon emissions. The only way for us is to adapt to the climate effects.” Do you agree?



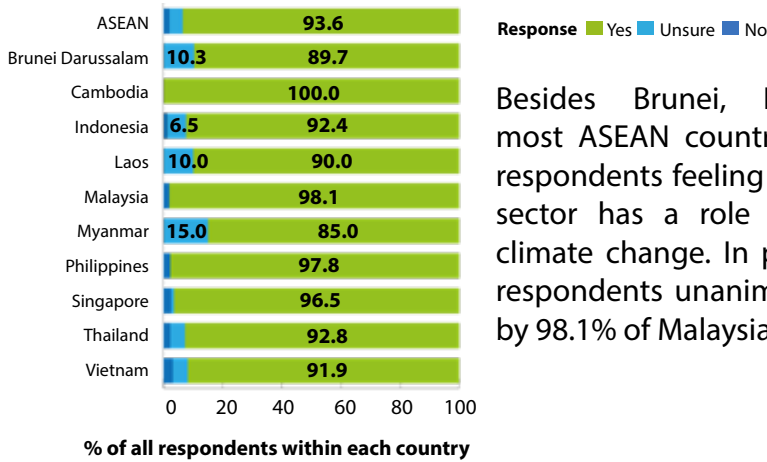
Most respondents (77.5%) believe that reducing carbon emissions rather than merely adapting to a warmer climate is still the most critical climate action. This is also observed for all countries besides Laos and Myanmar, where almost half of respondents are either uncertain or believe that adaptation is the only option. Myanmar also had the greatest proportion of respondents who agree with the statement. Notably, Philippines and Malaysia respondents were overwhelmingly supportive of carbon emissions reduction (95.7% and 90.4% respectively), followed by Singapore (84.9%). Overall, optimism for mitigation is very strong in ASEAN.

11. Do you think the private sector has a role to play in addressing climate change effects?

93.6% of ASEAN respondents feel that the private sector has a role to play in addressing climate change effects. 4.8% were unsure while 1.6% felt they had no role to play.

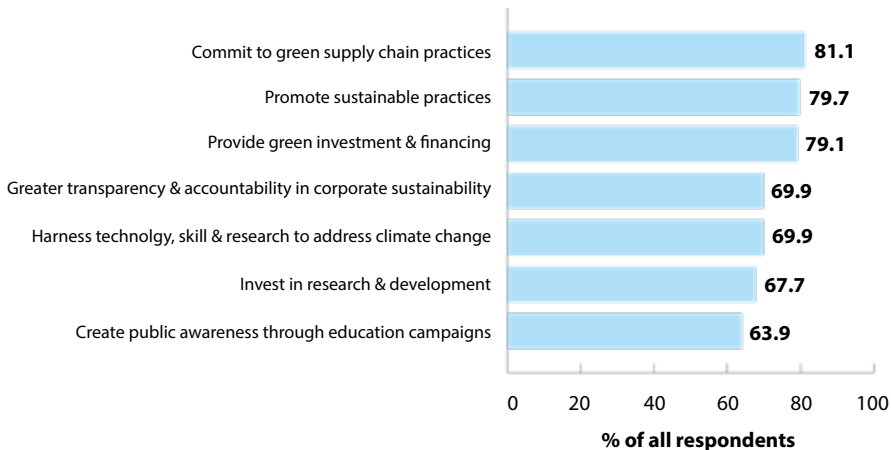
There is a greater consensus around the idea that the private sector should be involved in climate action, than the idea that the private sector should be responsible in addressing climate change (79.5%) (see question 9), indicating that there may be a distinction in how the respondents perceive the role and responsibility of the private sector.





Besides Brunei, Laos, and Myanmar, most ASEAN countries had over 90.0% of respondents feeling certain that the private sector has a role to play in addressing climate change. In particular, all Cambodia respondents unanimously agreed, followed by 98.1% of Malaysia respondents.

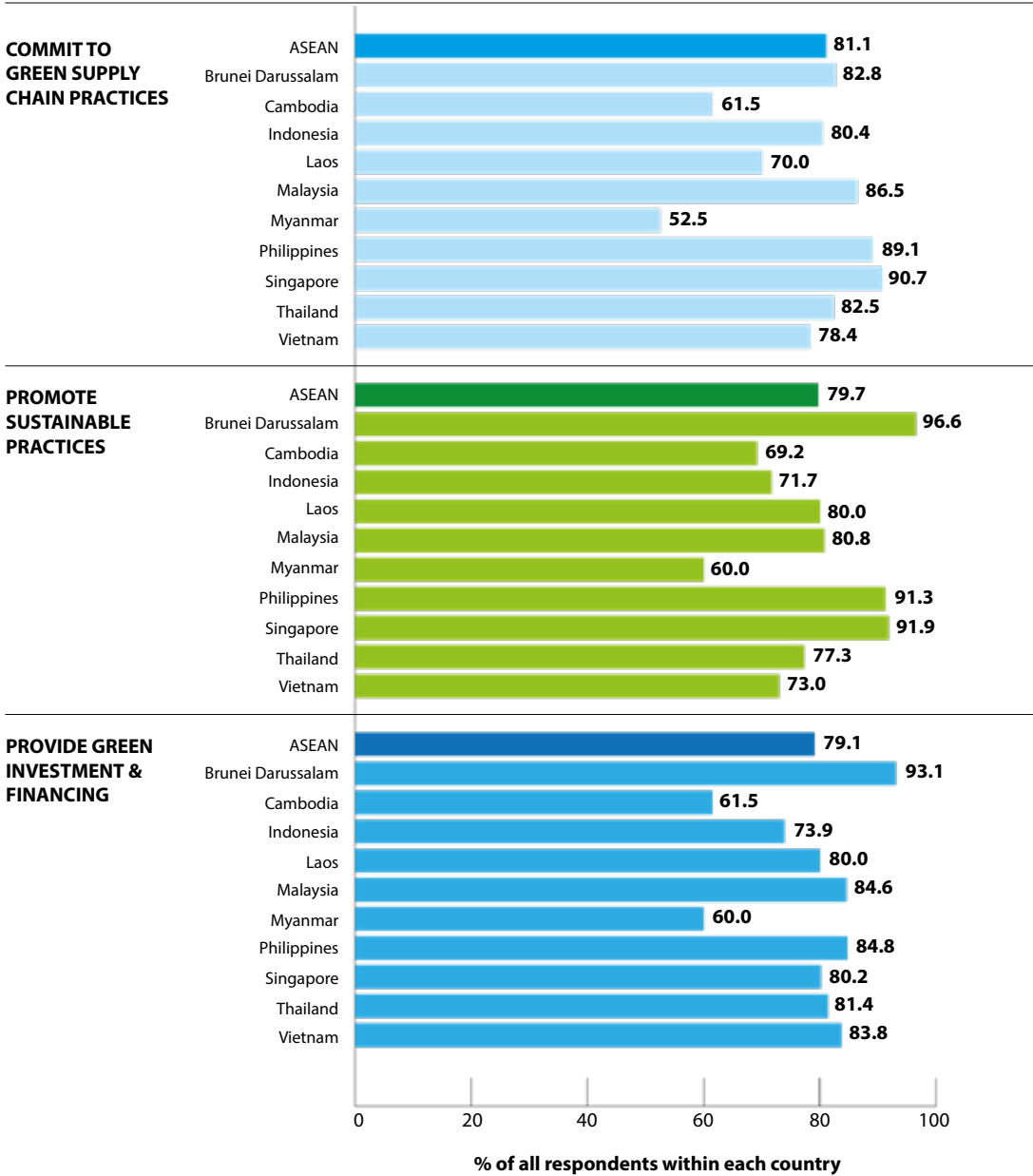
12. What do you think the private sector can do?



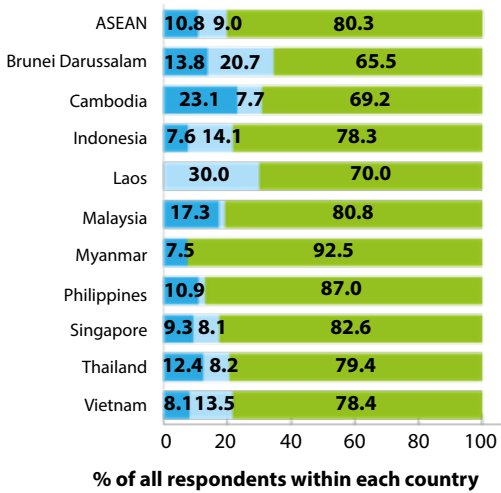
Respondents were generally supportive of all the listed actions that the private sector can take. The most popular options were committing to green supply chain practices (81.1%), promoting sustainable practices (79.7%) and providing green investment and financing (79.1%). The least supported option was creating public awareness (63.9%), indicating that a significant portion of respondents think this responsibility lies elsewhere.

Focusing on the top three actions that the private sector can do, Singapore has the most respondents who support the private sector in committing to green supply chain practices (90.7%), followed by the Philippines (89.1%) and Malaysia (86.5%). Meanwhile, the majority of respondents from Brunei (96.6%), the Philippines (91.9%), and Singapore (91.9%) believe that the private sector should promote sustainable practices. The majority of respondents from Brunei support the private sector in providing green investment and financial instruments (93.1%).

Preferred private sector actions by country



13. “More public financial support should be allocated to transition to low carbon economies.” Do you agree?

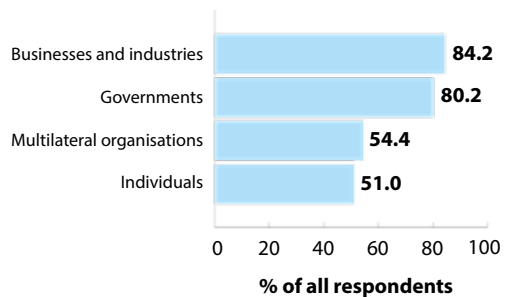


Response
 ■ Agree ■ Neither agree nor disagree ■ Disagree

80.3% of all respondents agreed that more public financial support should be allocated to transition to low carbon economies, especially Myanmar respondents (92.5%), followed by Philippines respondents (87.0%), Singapore respondents (82.6%) and Malaysia respondents (80.8%). The greatest disagreement was from Cambodia (23.1%), while Laos respondents are the most ambivalent (30.0% neither agree nor disagree) about allocating public financial support to low carbonisation.

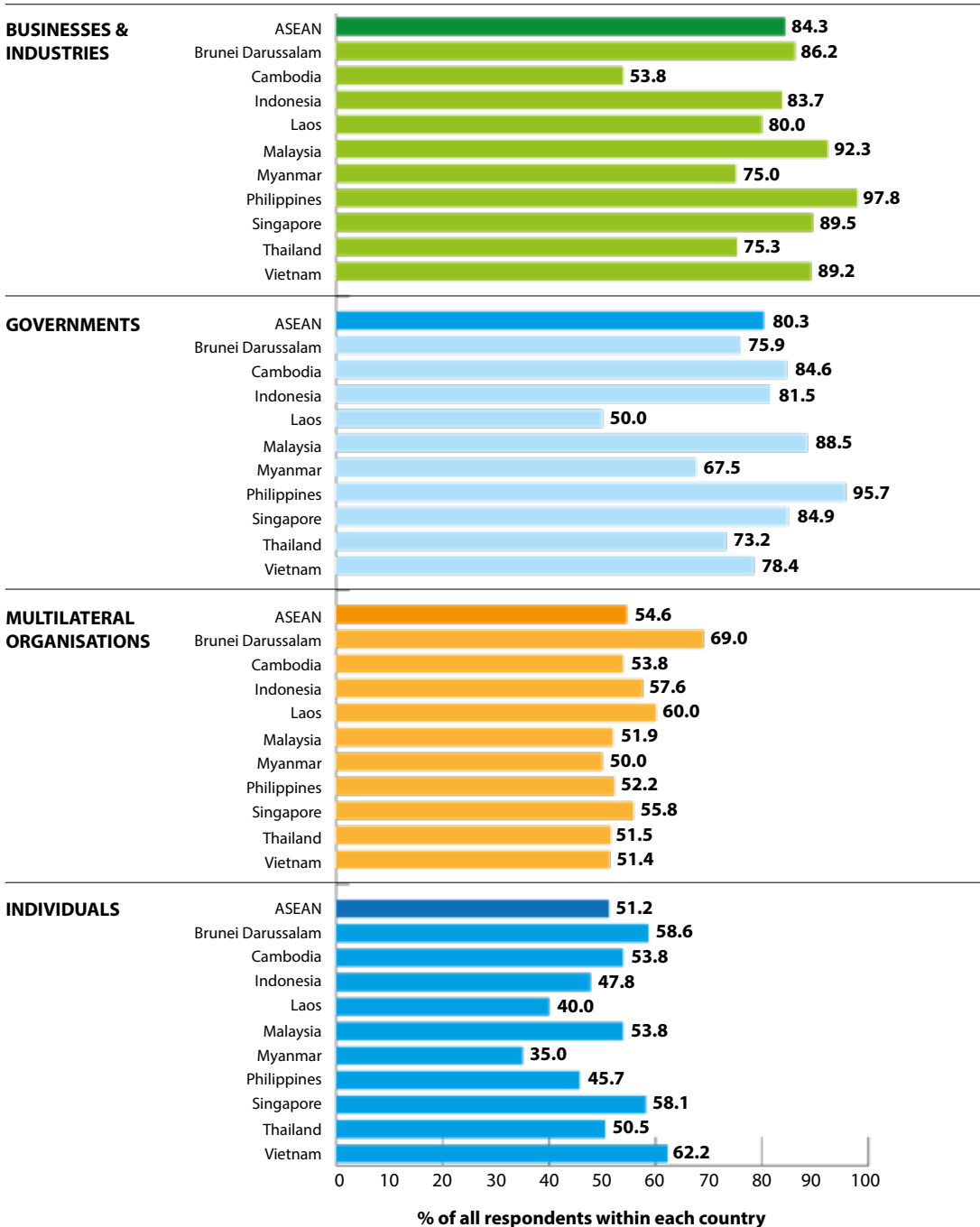
14. In your opinion, who should bear the cost of climate change measures?

Businesses and industries were identified by the highest number of respondents (84.2%) as being responsible for the cost of climate measures, followed by governments (80.3%), followed by multilateral organisations (54.6%) and individuals (51.2%). There is a fair gap (25.7%-33.1%) between the proportion of respondents who chose businesses, industries and governments, and that of those who chose multilateral organisations and individuals.

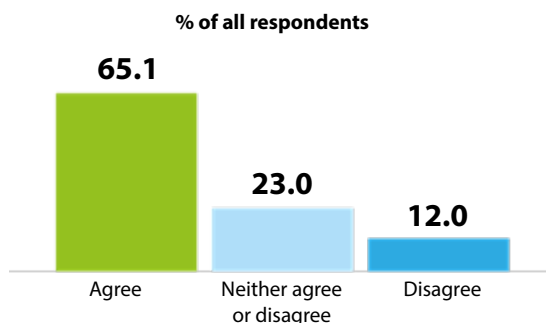


Here, individuals are given the least responsibility for costs, compared to the responsibility of tackling climate change in general, which was attributed to them by 82.1% of respondents (see question 9). This could indicate that respondents believe individual responsibility ends at bearing monetary and financial costs. Among the countries, Philippines respondents are most expectant of the responsibility of governments, businesses and industries in bearing the costs whereas Brunei and Vietnam respondents placed the onus on multilateral organisations and individuals respectively.

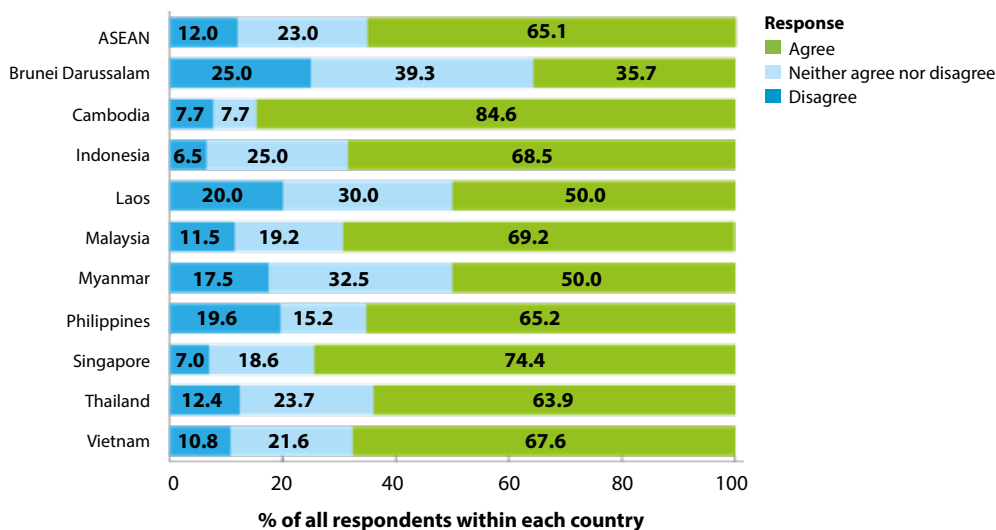
Responsibility of climate costs by country



15. "Subsidies for fossil fuels should be cut." Do you agree?

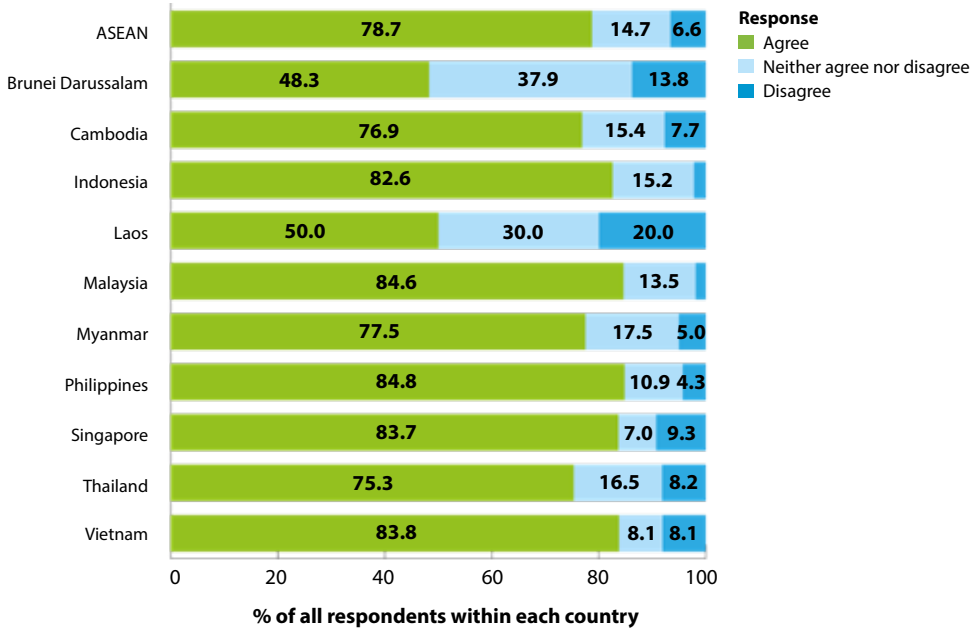


The majority of respondents (65.1%) agree that fossil fuel subsidies should be cut. In particular, 23.0% of respondents neither agree nor disagree, signifying some uncertainty among them.



Among ASEAN countries, Brunei, Laos, and Myanmar respondents are especially against cutting fossil fuel subsidies (25.0%, 20.0% and 17.5% respectively). However, Brunei is also the most ambivalent on the issue (39.3% selecting neither agree nor disagree), more so than ASEAN as a whole. On the other hand, Cambodia respondents showed by far the most agreement for cutting fossil fuel subsidies (84.6%), followed by Singapore (74.4%) and Malaysia (69.2%).

16. "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?



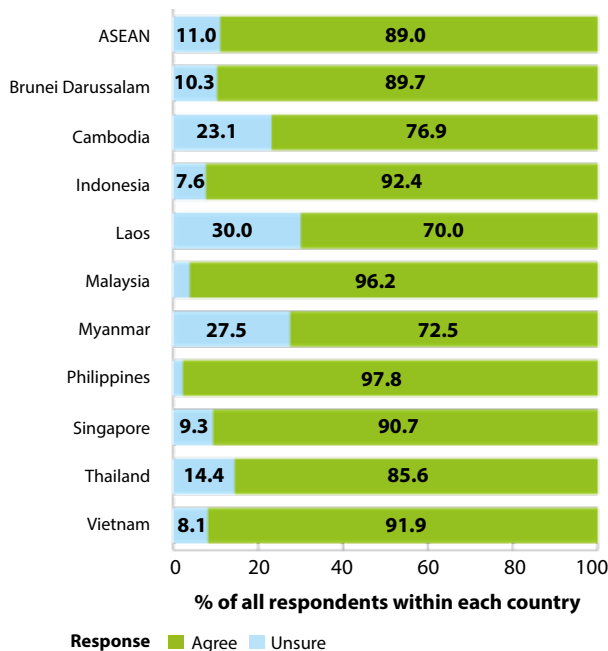
Among all respondents, 78.7% agree that reducing fossil fuel dependence will be beneficial in the long term, which is reflected in most countries except Brunei and Laos, where opinion is rather evenly split. These two countries also have the highest level of disagreement at 20.0% for Laos and 13.8% for Brunei. Conversely, Philippines respondents are the most optimistic about reducing dependence on fossil fuels (84.8%), followed very closely by Malaysia (84.6%), Vietnam (83.8%) and Singapore (83.7%).





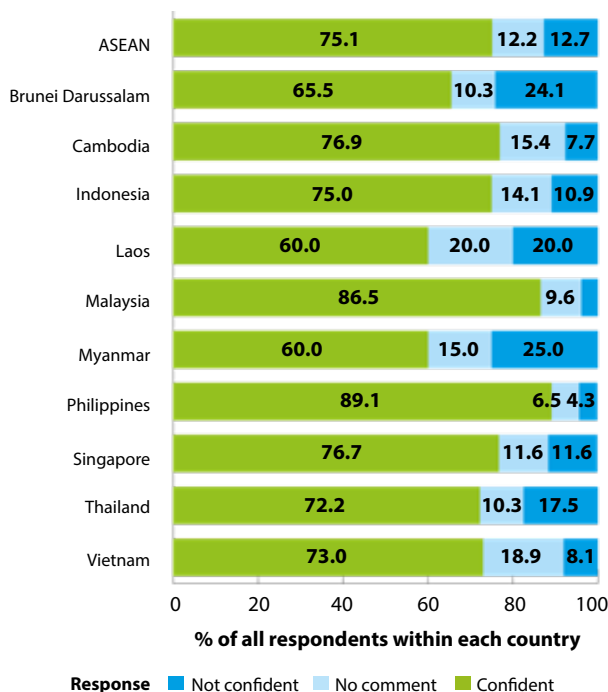
Section IV: Perceptions of Energy, Food Security and Cities

17. "There is potential for ASEAN to tap into the renewable energy sector."
Do you agree?



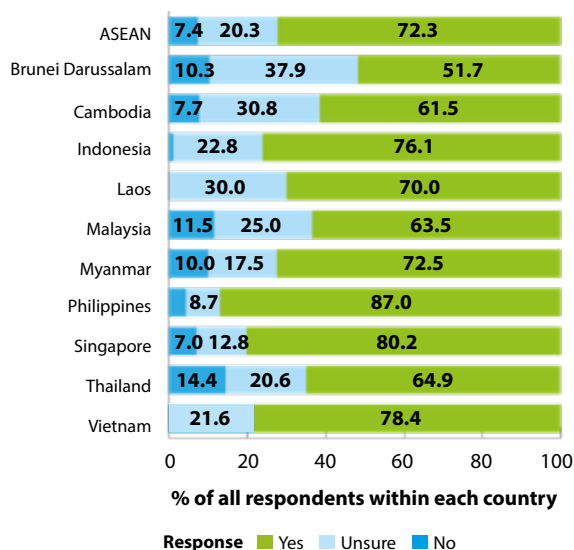
Respondents generally agree that there is potential for ASEAN countries to tap into renewables; though there is a large gap in levels of agreement in Laos (70.0%), Myanmar (72.5%) and Cambodia (76.9%) compared to that in the Philippines (97.8%), Malaysia (96.2%), Indonesia (92.4%) and Vietnam (91.9%). It should be noted that none of the respondents disagreed with the statement. All chose either 'Yes' or 'Unsure'. This demonstrates that no one will deny the potential of renewable energy.

18. Are you confident that adopting climate change measures and policies will drive innovation and competitiveness of your economy?



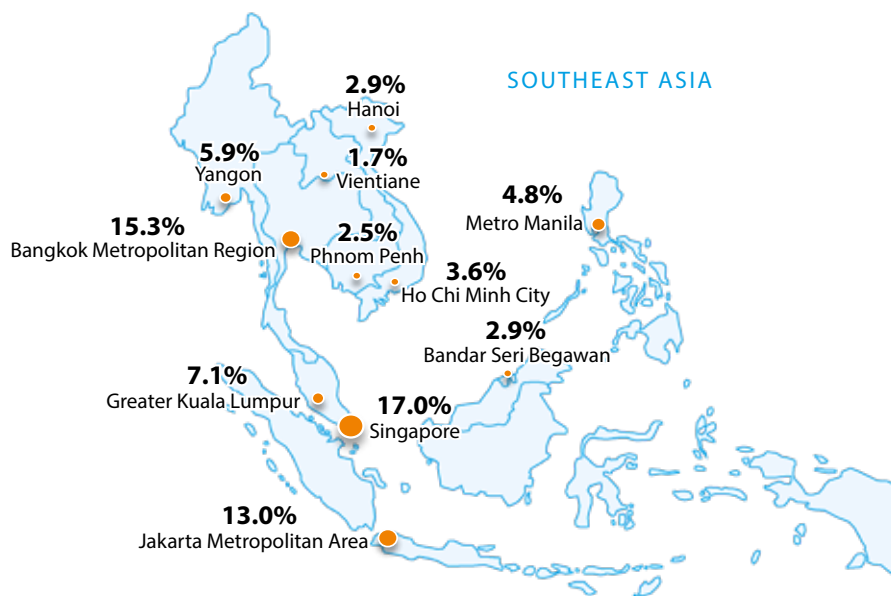
75.1% of respondents are confident that adopting climate change measures and policies will drive innovation and competitiveness in their own economies. In particular, 89% of Philippines respondents were confident, while only 60% of respondents from Laos and Myanmar were confident. On the other hand, Brunei had the highest proportion of respondents who were not confident (24.1%). Across all countries, about 6.5%-18.9% of respondents chose not to comment.

19. "My country's food security is threatened by climate change." Do you agree?



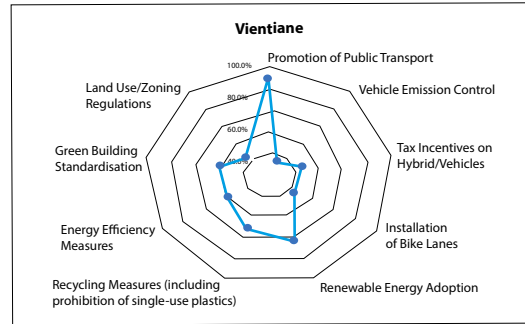
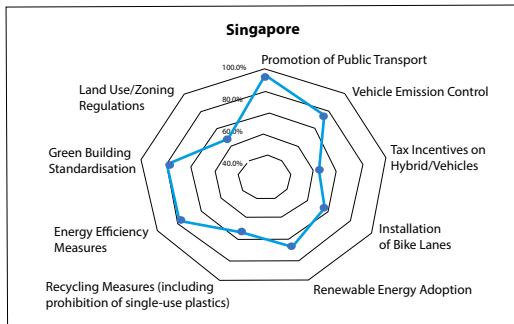
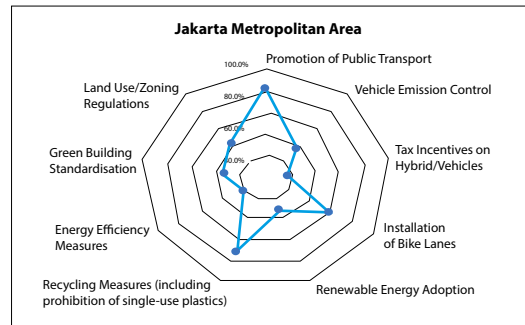
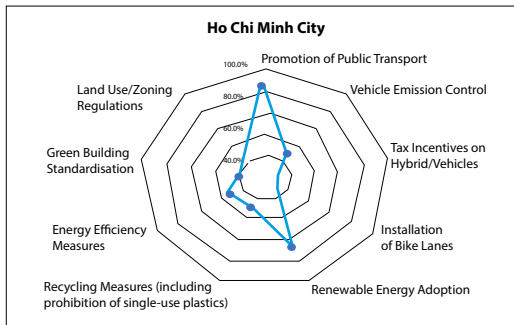
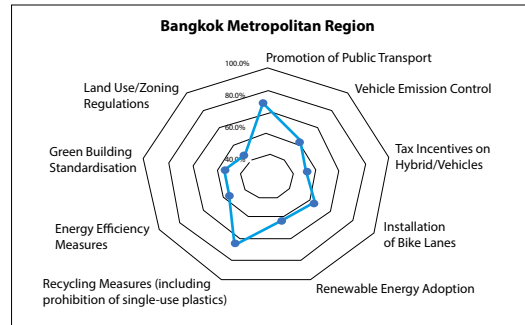
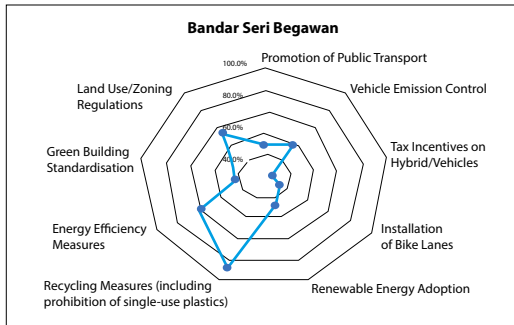
Respondents mostly agreed (72.3%) that their respective countries' food security is threatened by climate change, but this question also saw a relatively high level of uncertainty. Overall, 20.3% of respondents were unsure; this proportion is at 37.9% for Brunei and 30.0% for Laos. Philippines respondents were the most concerned for their food security (87.0%), followed by Singapore respondents (80.2%). Disagreement was highest for Thai (14.4%) and Malaysian respondents

20. Which city do you live in?



Most of the respondents were concentrated in Southeast Asian capital cities. The most well represented cities were Singapore with 81 respondents, Bangkok Metropolitan Region (73), Jakarta Metropolitan Area (62) and Greater Kuala Lumpur (34).

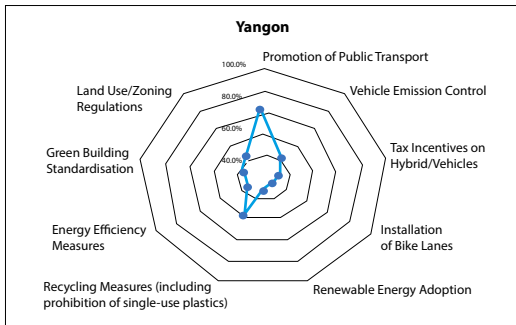
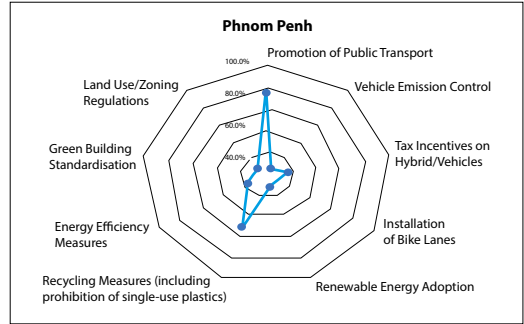
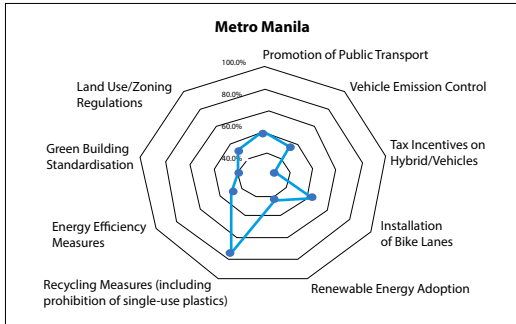
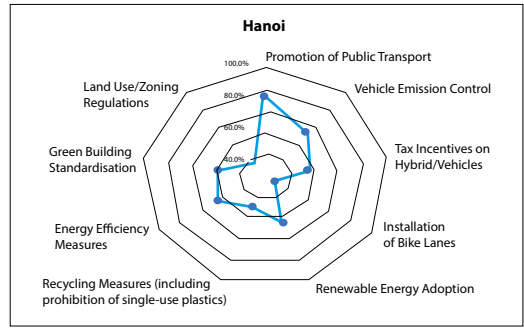
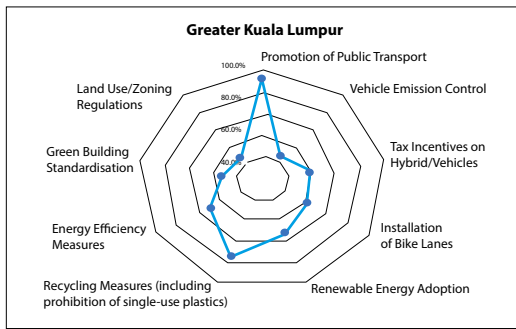
21. Which of the following climate change mitigation measures has your city implemented?



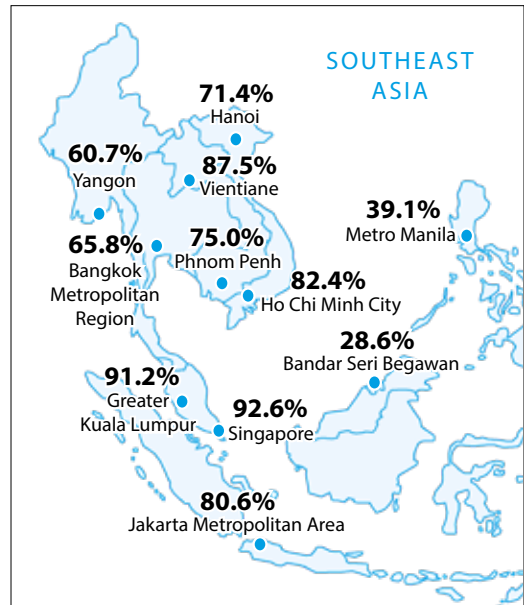
Focusing on political and economic capital cities¹ (Singapore, Bangkok Metropolitan Region, Jakarta Metropolitan Area and Greater Kuala Lumpur, Yangon, Metro Manila, Ho Chi Minh City, Hanoi, Phnom Penh, Bandar Seri Begawan and Vientiane), there were variations in the percentage of respondents who observed mitigation and adaptation measures in their cities.

When asked which climate change mitigation measures they have observed, respondents were able to choose from nine examples of climate change mitigation measures implemented in their cities: promotion of public transport, vehicle emissions control, tax incentives on hybrid vehicles, installation of bike lanes, renewable energy adoption, recycling measures

¹ Aside from the cities included here, Tutong in Brunei Darussalam was one of the top twelve cities with the most respondents. Data on Tutong is available upon request.



My city has promoted public transport



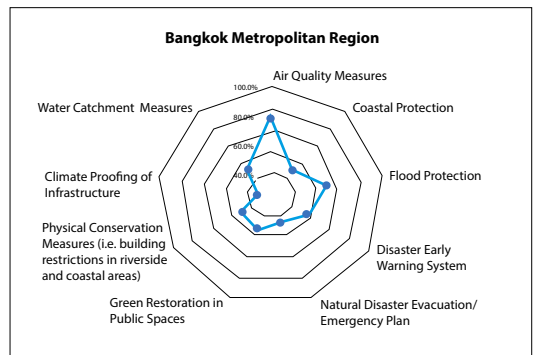
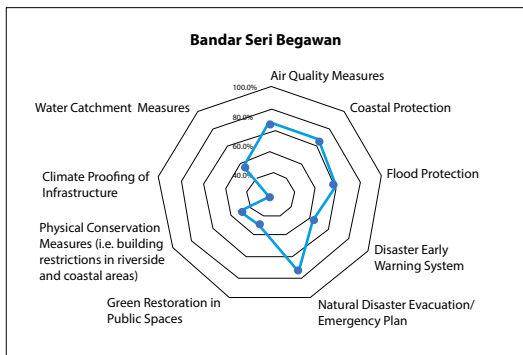
(including prohibition of single-use plastics), energy efficiency measures, green building standardisation, and land-use/zoning regulations (including farmland protection and greening of cities).

Among all ASEAN respondents, promotion of public transport was the top choice (64.5%), especially in Singapore (92.6%) and Greater Kuala Lumpur (91.2%). It was followed by recycling measures (55.6%) and vehicle emissions control (38.0%).

Singapore, the city with the most respondents, had the most well-rounded response, with at least 44.4% choosing every option. Its top measures were promotion of public transport (92.6%), green building standardisation (77.8%) and energy efficiency measures (76.5%). For each of these measures, Singapore was also the top city. The second most represented city, Bangkok Metropolitan Area, mostly identified

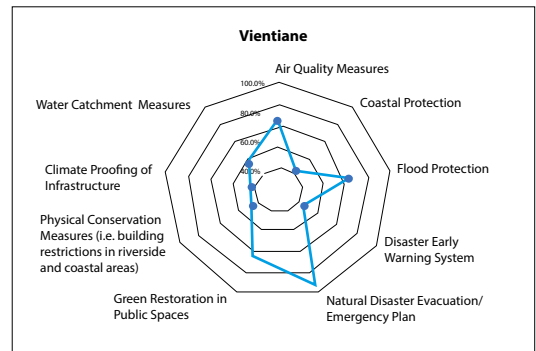
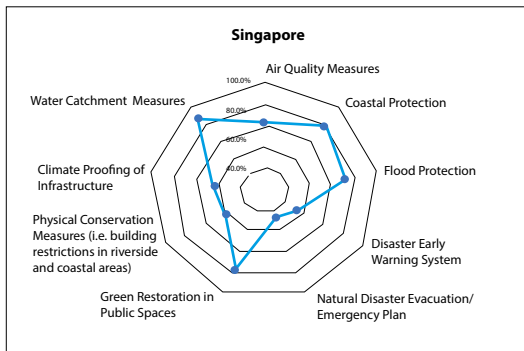
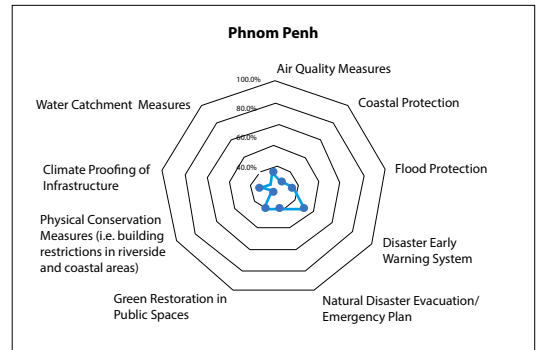
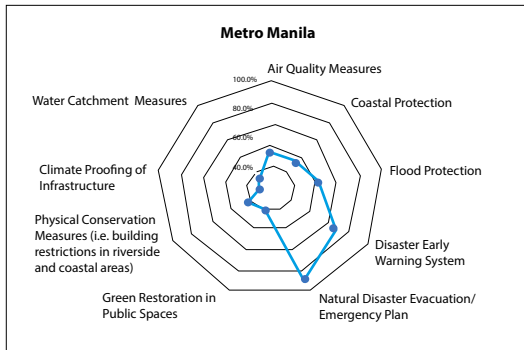
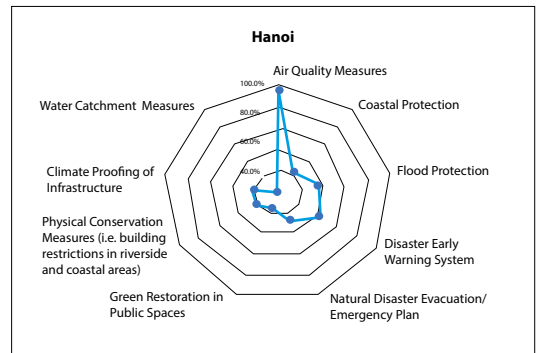
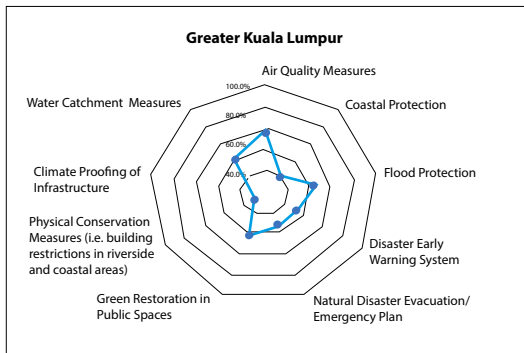
public transport promotion (65.7%), recycling measures (61.6%) and vehicle emissions control (41.1%). Next, Jakarta Metropolitan Area focused on public transport promotion (80.6%), recycling measures (66.1%) and bike lanes (56.5%). It also had the greatest proportion of respondents identifying the installation of bike lanes (56.4%) while Ho Chi Minh City chose renewable energy adoption the most (64.7%). Recycling measures were the most prominent in Bandar Seri Begawan (85.7%).

22. Which of the following climate change adaptation measures has your city implemented?

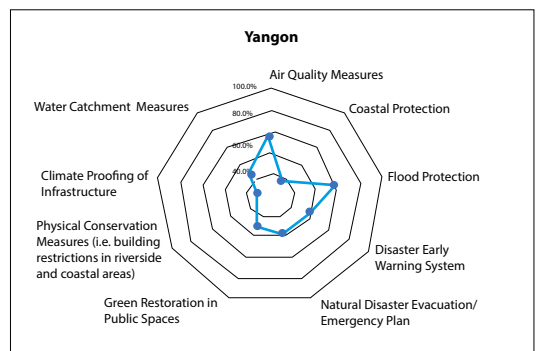


When asked which climate change adaptation measures their cities have implemented, respondents chose from air quality measures, coastal protection,

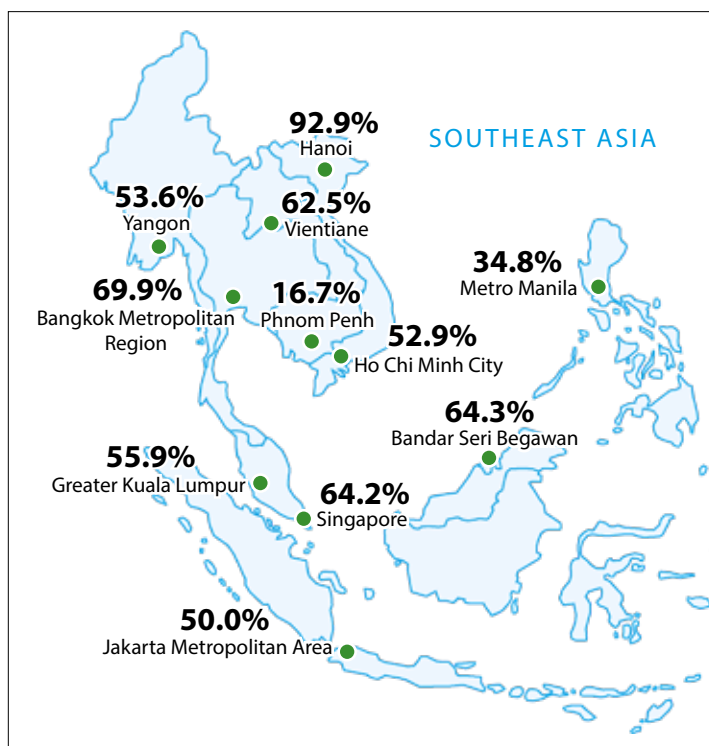
flood protection, disaster early warning system, natural disaster evacuation/emergency plans, green restoration in public spaces, physical conservation



measures (i.e. building restrictions in riverside and coastal areas), climate proofing of infrastructure and water catchment measures. Among all ASEAN respondents, the most commonly identified adaptation measures were air quality measures (50.4%) and flood protection (49.8%).



My city has implemented air quality measures

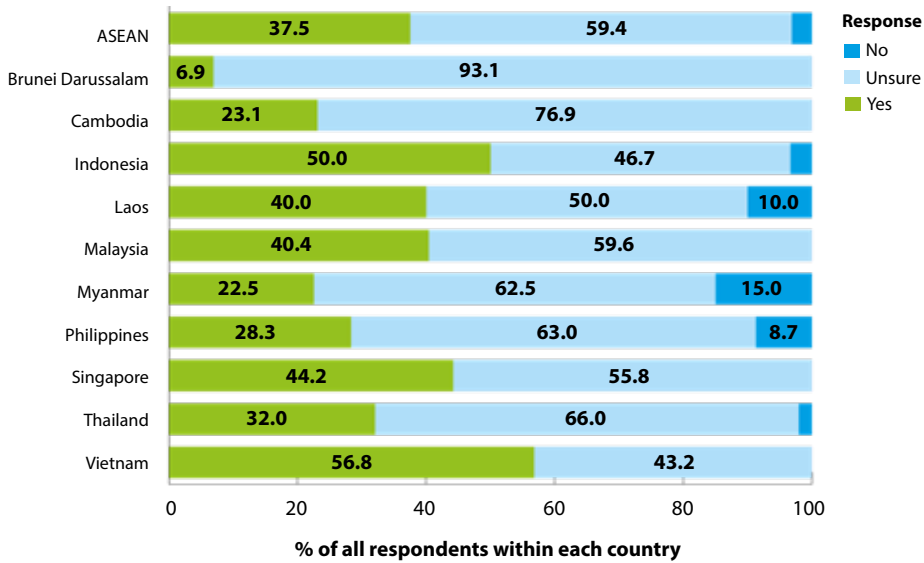


Singapore respondents mainly chose water catchment measures (90.1%), coastal protection (79.0%) and green restoration (75.3%). It was also the top city for coastal protection, flood protection, physical conservation, climate proofing and water catchments. Bangkok Metropolitan Area respondents' top choices were disaster warning systems (37.0%), green restoration (32.9%) and water catchments (30.1%). Jakarta Metropolitan Area respondents mainly identified green restoration (61.3%), disaster evacuation plans (37.1%), disaster warning systems (35.5%) and water catchment measures (35.5%). Air quality measures were Hanoi respondents' top choice (92.9%). Metro Manila's most commonly chosen measures were disaster warning systems (65.2%) and was the top city for implementing disaster warning systems and climate proofing measures (both 65.2%) while most Vientiane respondents chose disaster evacuation plans (87.5%).



Section V: Perceptions of Nationally Determined Contributions (NDCs) & Climate Governance

23. Has your country submitted a Nationally Determined Contribution (NDC) under the Paris Agreement?

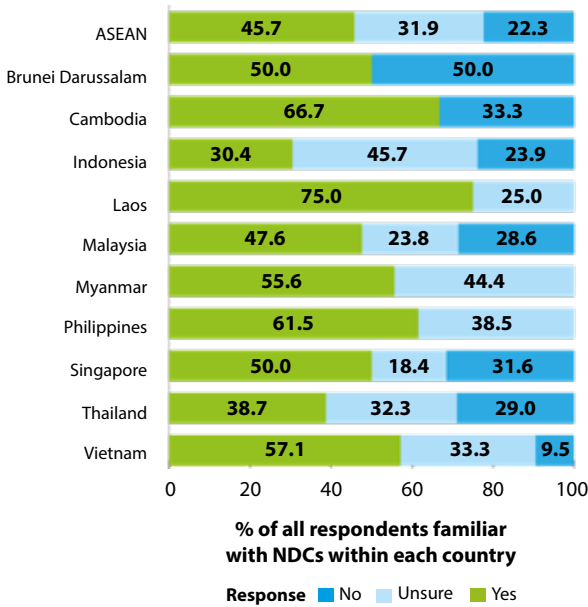


Bearing in mind that all ten countries have submitted an intended NDC under the Paris Agreement in 2015, only 37.5% of respondents are certain of this fact. The majority of respondents in ASEAN are unsure (59.4%), indicating a general lack of awareness regarding their country’s international climate policy. While the language barrier in this survey may have been partially responsible for this uncertainty, awareness is low even in countries where English is more commonly spoken, such as Singapore (44.2%) and the Philippines (28.3%).



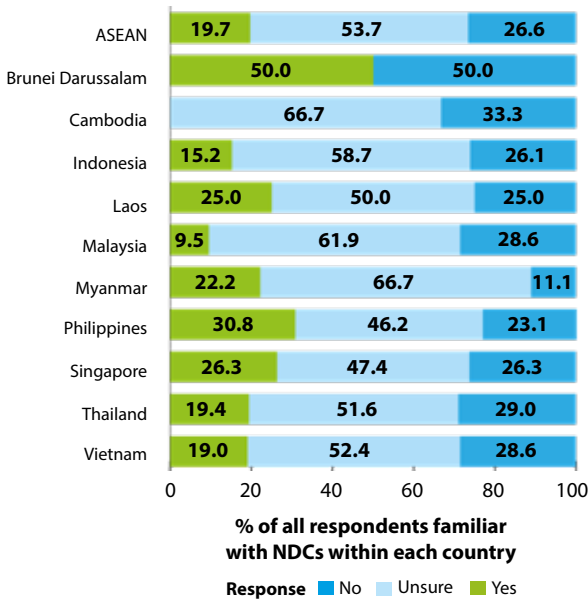
Photo taken from UNFCCC Secretariat

24. Do you think your country/government has set a fair and ambitious target in its NDC?



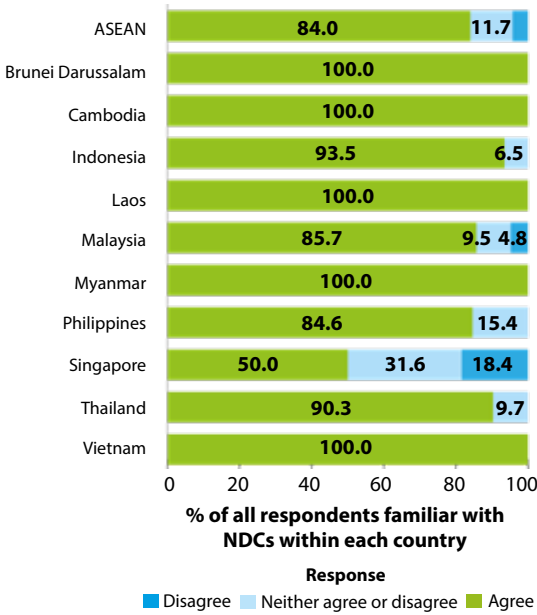
The following three questions about NDCs were answered only by respondents who chose 'Yes' in the previous question and are thus already familiar with NDCs. While 45.7% of all respondents felt that their country has a fair and ambitious NDC, opinion in individual countries vary greatly. Laos has the highest proportion of respondents satisfied with their NDCs (75.0%), while Thailand respondents have the lowest proportion answering 'Yes' (38.7%). However, disagreement is greatest in Brunei, with an exact split between 'Yes' and 'No' answers. Most countries had a relatively high proportion of unsure respondents, especially Indonesia (45.7%) and Myanmar (44.4%).

25. Were your country's citizens consulted in the process of preparing an NDC?



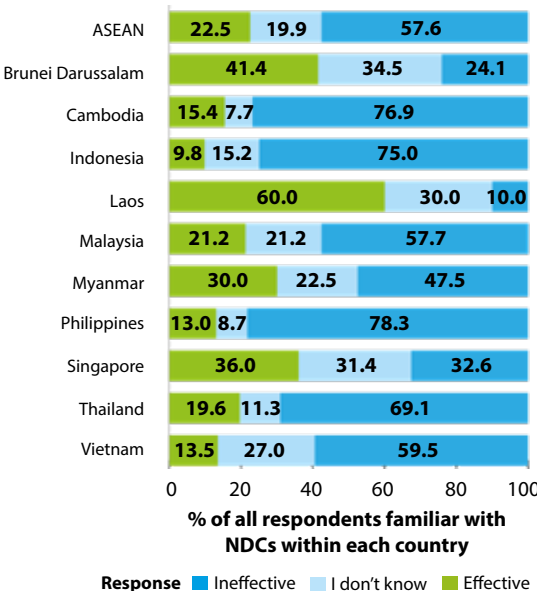
The majority of respondents were uncertain about whether they were consulted by their governments over their NDCs. This was roughly reflected in every country (51.6%-66.7% were unsure) except Brunei, which has 0 respondents selecting 'Unsure'. Brunei has the highest proportion of both 'Yes' and 'No' answers (50.0% for both), making it the most divided country in the response to this question. In contrast, Myanmar has the highest rate of uncertainty (66.7%). Also notable is that none of the Cambodia respondents are sure their citizens were consulted (0.0% selected 'Yes').

26. “My country needs capacity-building support to meet our NDC targets. Developed countries need to step up.” Do you agree?



The overwhelming majority of countries agreed that their country needs capacity-building support. This is especially true for respondents from Brunei, Cambodia, Laos, Myanmar and Vietnam, all of whom unanimously agreed. Singapore has the highest proportion of uncertainty as well as disagreement (31.6% and 18.4% respectively). None of the other countries have a rate of agreement below 85.0%, making this response a strong signal that ASEAN requires support from developed countries in order to meet its targets.

27. How would you rate your government’s policies and actions taken in support of climate change?

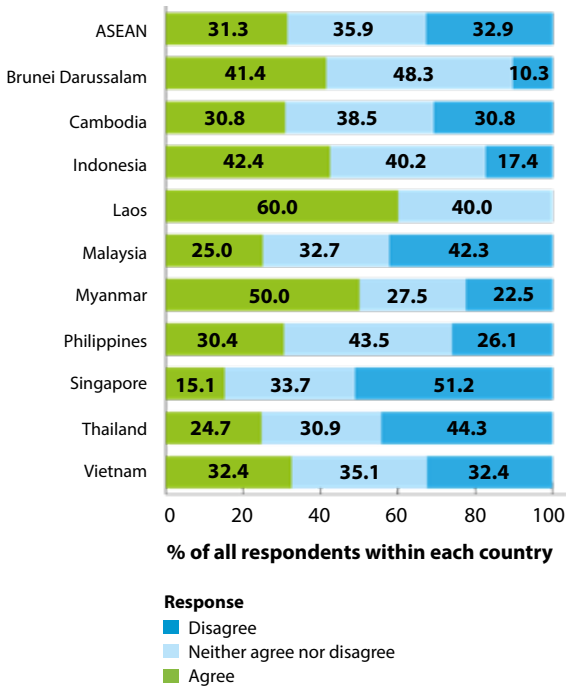


57.6% of all ASEAN respondents felt that their government was ineffective in tackling climate change. Cambodia (76.9%), Indonesia (75.0%) and the Philippines (78.3%) are the most certain that their governments were ineffective. Laos and Brunei respondents appear to have the highest approval for their governments’ climate policies and actions (60.0% and 41.4% respectively). However Brunei respondents also had the highest proportion of respondents choosing ‘I don’t know’, another indicator of their divided opinion. Singapore respondents were almost equally split between the three responses, with around a third selecting each option.



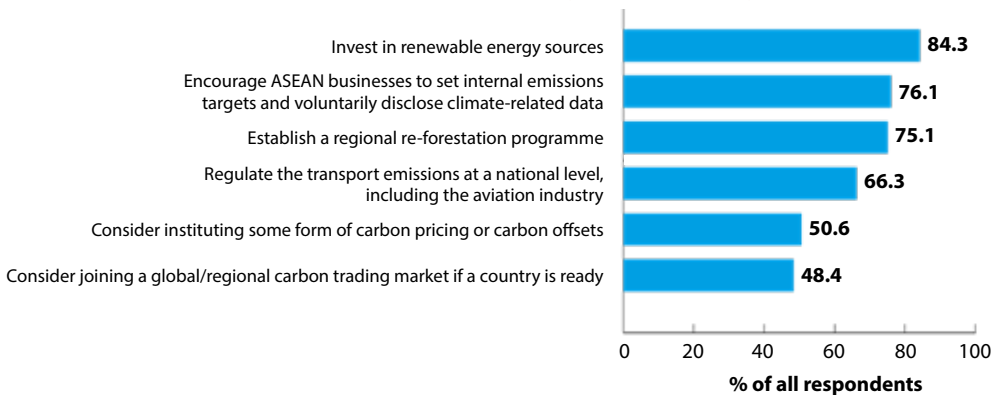
Section VI: Perceptions of Regional Cooperation

28. ASEAN is working together effectively to tackle climate change. Do you agree?



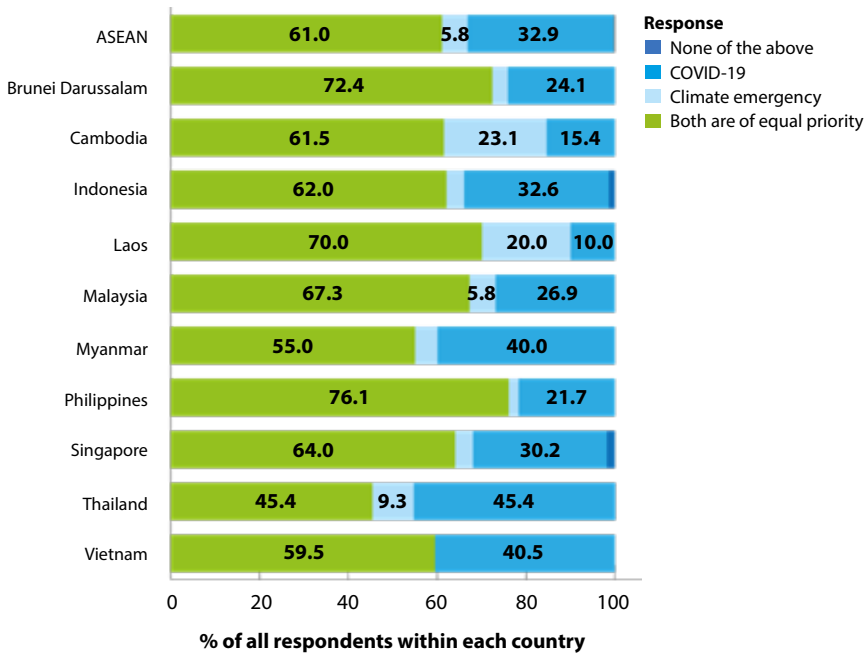
ASEAN as a whole is almost evenly split in their responses, while certain countries such as Laos, Myanmar and Brunei tend to agree slightly more (60.0%, 50.0% and 41.4% respectively). In fact, Laos has no respondents that outrightly disagree. Disagreement is a little stronger in Singapore and Malaysia (51.2% and 42.3% respectively) compared to ASEAN in general. In addition, for most countries, uncertainty is almost as common as the other two responses, if not more common. It is especially high in Brunei (48.3% neither agree nor disagree). There is room for ASEAN to work collaboratively with its member states in systematically addressing climate challenges.

29. How can ASEAN governments individually or collectively combat climate change?



The top three most popular options were investing in renewable sources (84.3%), encouraging businesses to set internal emissions targets and voluntarily disclose climate-related data (76.1%), and a regional reforestation programme (75.1%). This reflects a focus on carbon emissions reduction as well as carbon removal, suggesting that both short-term and long-term solutions are favoured, including a focus on the accountability of the private sector. Respondents are less keen on carbon-related economic instruments (50.6% for carbon pricing and offsets, 48.4% for carbon trading). This could be related to the lack of an understanding of how these instruments work.

30. Which of the two crises – COVID-19 or the climate emergency – should governments prioritise?



There is a consistent majority across all countries of respondents affirming that both COVID-19 and the climate emergency are of equal priority. Short-term and ongoing climate change impacts are being seriously acknowledged even as the pandemic’s instantaneous and drastic effects are felt across ASEAN. Climate change is no longer viewed as being on the horizon, but as a very current crisis. The strength of this opinion varies: Thailand, Vietnam and Myanmar are more divided on the issue, with 45.4%, 40.5% and 40.0% respectively prioritising COVID-19. Also worth noting are Cambodia and Laos, whose respondents prioritise the climate emergency at much higher rates than other countries (23.1% and 20.0% respectively). Both have very low numbers of reported COVID-19 cases and zero reported deaths (at the time of writing).



Thank you

We would like to extend our sincere appreciation 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 on climate change as an ASEAN collective.



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