

THE STATE OF

SOUTHEAST ASIA

2022

SURVEY REPORT



THE STATE OF SOUTHEAST ASIA: 2022 SURVEY REPORT

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

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

ABOUT THE SURVEY

Now into its 4th edition, *The State of Southeast Asia* survey was launched in 2019 to gauge the views and perceptions of Southeast Asians regarding geopolitical developments affecting the region, key regional affairs and how ASEAN has engaged with its Dialogue Partners over the preceding year.

The objective of the survey is to present a snapshot of the prevailing attitudes among those in a position to inform or influence policy. The survey is not meant to present a definitive view of issues in the region. Instead, it is designed to highlight the perceptions of the region's policymakers, academics, researchers, businesspeople, media personnel, and civil society activists towards a range of issues affecting Southeast Asia. Since 2019, it has become a reference source for scholars on Southeast Asia and ASEAN.

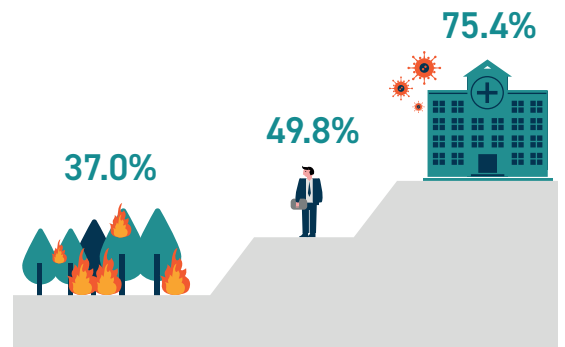
This year's survey was conducted over a period of 7 weeks from 11 November 2021 to 31 December 2021. The survey was offered in English, Bahasa Indonesia, Khmer, Lao, and Vietnamese language options. A total of 1,677 respondents from ten Southeast Asian countries took part in the survey.

There are six sections in the survey. Section I covers the profile of the respondents by nationality, affiliation and age. Section II deals with questions on the regional outlook and COVID-19. Section III covers regional influence and leadership of major and middle powers. Section IV deals with ASEAN's options in the changing regional political-security architecture. Section V measures perceptions of trust among Southeast Asians towards 5 countries – China, United States, Japan, the European Union and India. Section VI gauges levels of soft power in the region based on travel and tertiary education choices. The questions and results have been reorganised for logical flow and optimal reporting. The figures in this report have been rounded up/down to the nearest one decimal point.

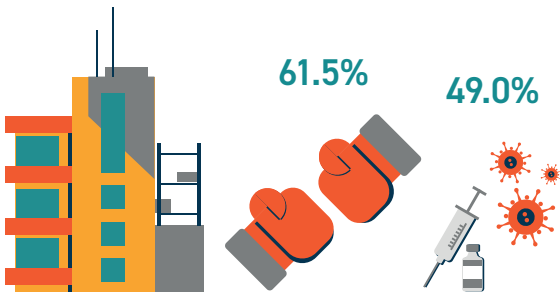
SURVEY HIGHLIGHTS

1

Southeast Asia continues to be preoccupied with the COVID-19 pandemic and economic recovery. The most pressing concern remains the pandemic's threat to health (75.4%), followed by unemployment and economic recession (49.8%), and the impact of climate change (37.0%). Terrorism continues to rank last at 12.5%.



70.1%

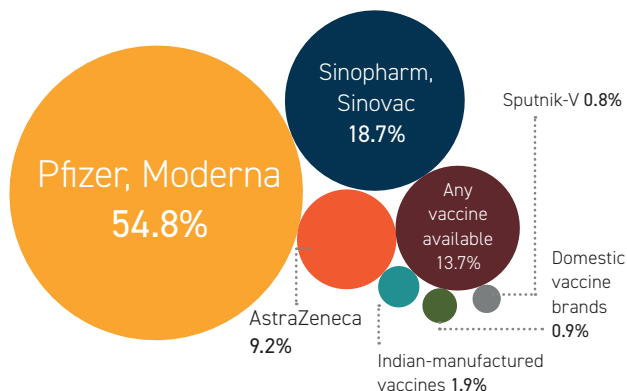
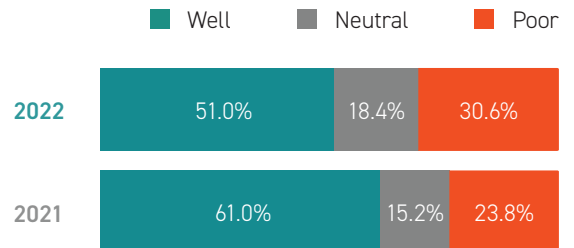


2

Southeast Asians are most concerned that ASEAN is slow and ineffective, and thus cannot cope with political and economic developments (70.1%). They also share the concern that ASEAN is becoming an arena for major power competition in which its member states may become proxies of major powers (61.5%). At the same time, there remains concern that ASEAN is unable to overcome the current pandemic challenges (49.0%).

3

Slightly more than half of the respondents (51.0%) feel that their governments have performed well or adequately in addressing the COVID-19 pandemic. 30.6% of the respondents disagree while 18.4% remain neutral.

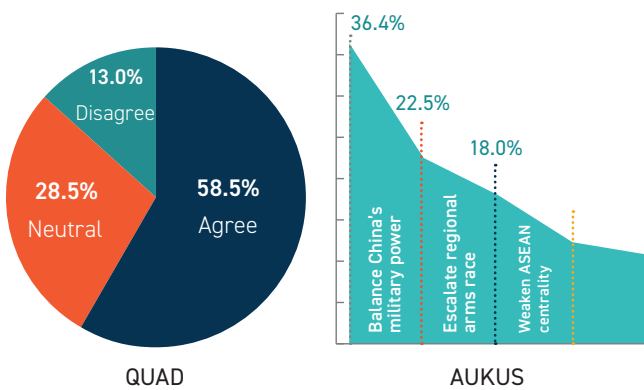


4

The most trusted vaccine brands among Southeast Asians are the mRNA Pfizer and Moderna (54.8%), followed by Chinese brands Sinopharm and Sinovac (18.7%). 13.7% of the respondents feel comfortable with any vaccine available, higher than the vote share for AstraZeneca (9.2%), Indian-manufactured vaccines (1.9%), domestic vaccines (0.9%) and Sputnik-V (0.8%).

5

The Myanmar crisis has put ASEAN's centrality and unity to the test. 37.0% of the respondents approve of ASEAN's response to the crisis, 33.1% disapprove, and 29.9% remain neutral. 42.5% of respondents who approve feel that ASEAN has taken active steps to mediate in the crisis while 45.5% of those who disapprove feel that ASEAN is moving too slowly in its response to the escalating political and humanitarian crisis.



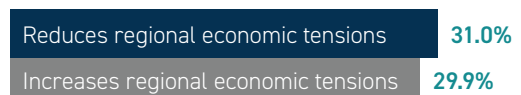
6

Competing spheres of influence in the region and beyond are not far from everyone's minds. 58.5% of the respondents welcome the strengthening of the Quadrilateral Security Dialogue (QUAD) and the prospects of tangible cooperation in areas such as vaccine security and climate change. On regional security, 36.4% feel that the AUKUS arrangement will help balance China's growing military power, 22.5% feel that it will escalate the regional arms race, while 18.0% are of the view that it will weaken ASEAN centrality.

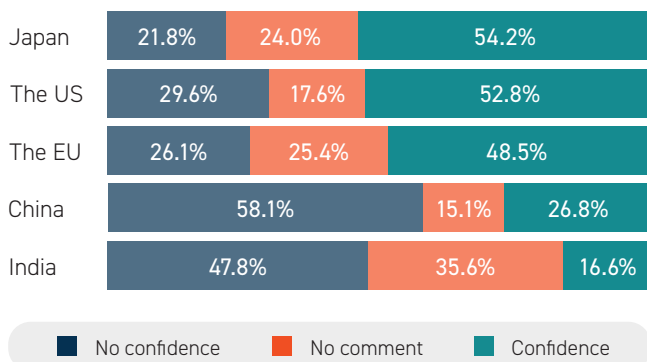
7

China's membership in the CPTPP is perceived to create both opportunities and challenges for the region. 31.0% feel that it will reduce economic tensions in the region and help to resolve the US-China trade war while 29.9% disagree. In the absence of the US, close to half (46.8%) are of the view that a rise in China's influence will fill the void. 23.2% are worried about the rise in regional tensions as the US shifts its focus of engagement to exclusive security pacts in the Indo-Pacific.

China's membership in the CPTPP



Main implications of the US staying out of the CPTPP



8

Japan remains the most trusted major power among Southeast Asians, with 54.2% of the respondents expressing confidence in Japan to "do the right thing" to provide global public goods, followed by the US (52.8%), and the EU (48.5%). Of those who express distrust towards China (58.1%), 49.6% fear that China could use economic and military power to threaten their country's interest and sovereignty.

METHODOLOGY

The region's challenges have become increasingly complex with each passing year and the number of questions to be surveyed have also increased in tandem. This year's survey questions were carefully designed and curated with the help of a panel of experts; relentlessly edited and tested to remove self-selection bias, red herring questions and so on.

Putting aside branching questions, the survey comprised **50 questions** in total which takes approximately **15-25 minutes** to complete. It was conducted both online and offline using a mixed sampling method. A total of 1,677 Southeast Asians completed the survey. Majority of the respondents — 1,507 self-identified Southeast Asians — took the survey online while another **170** were polled using Computer-Assisted Personal Interview (CAPI) methods in Cambodia, Indonesia, Malaysia, Thailand and Vietnam with the assistance of a panel provider.

Respondents came from **5 affiliation categories**: (a) academia, think-tankers and researchers; (b) business or finance

representatives; (c) civil society, NGO or media representatives; (d) government officials; and (e) regional or international organisations personnel.

We decided to apply a different methodology this year assigning a **10% weighted average** to each country's responses to calculate the average figures for ASEAN as a whole. This is to ensure that the responses of each country are represented by equal proportion, given that ASEAN's decision-making processes are based on each country having equal say, regardless of country or population size. Final analysis of regional sentiment was conducted on the weighted data set. For the questions that required trend analysis, we applied the same weighted average method to the 2021 data so that comparative analysis can be done. We applied a strict set of criteria during the data cleaning process to maintain data quality and integrity.

Users should note that 2021 survey data may have changed moderately with the use of the 10% weightage method.

APPRECIATION

We would like to extend our deepest appreciation to our institutional partners Mr Julio Amador III of Amador Research Services of the Philippines and Dr Asyurah Salleh and Mr Naveed Khan of Global Awareness & Impact Alliance (GAIA) of Brunei for helping us to promote this survey in their foreign policy circles.

We are also grateful for the unstinting assistance from the ASEAN Studies Centre interns, Mr Muhammad Afiq Hajis and Mr Tyler Wu, in the collection, cleaning and weighting of the survey data. We also want to extend our thanks to the various

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

Last but not least, we wish to extend our sincere appreciation to the 1,677 respondents for taking their time to complete this Survey. Your collective voice is demonstrative of the ASEAN Community-In-Action.

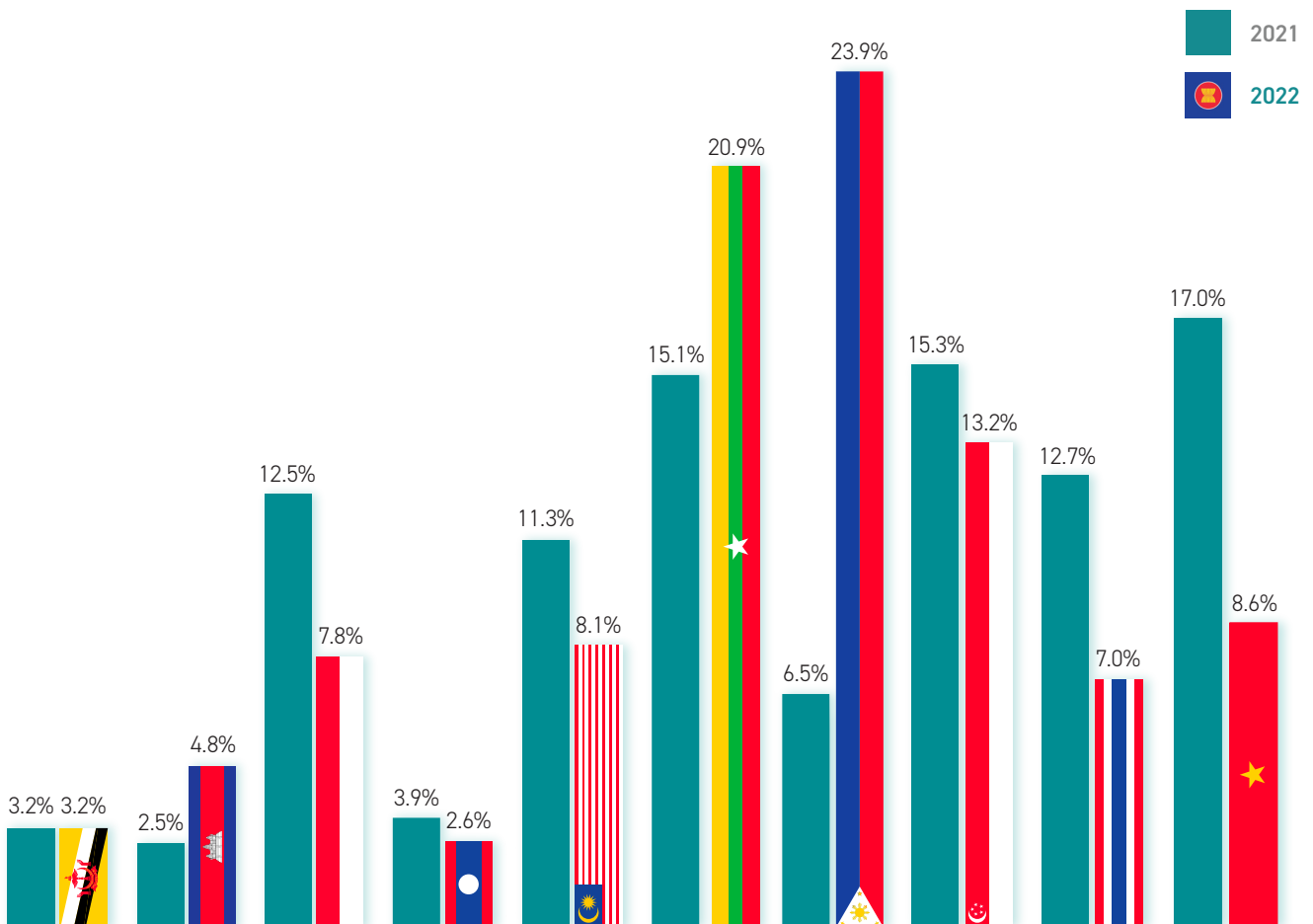
SECTION I: Respondents' Profile

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

NATIONALITY

A total of 1,677 respondents from ten ASEAN member states participated in this survey. The Philippines led with the highest number of respondents at 400 (23.9%), followed closely by Myanmar at 350 (20.9%) and Singapore at 222 (13.2%). The breakdown for the rest of the countries are: Vietnam (8.6%), Malaysia (8.1%), Indonesia (7.8%), Thailand (7.0%), Cambodia (4.8%), Brunei (3.2%) and Laos (2.6%).

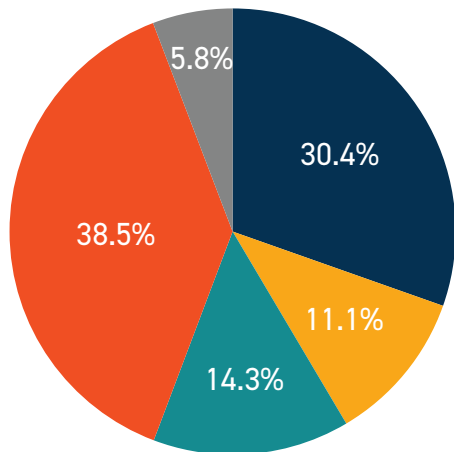
Q1 What is your nationality?



AFFILIATION

The largest affiliation group this year came from Government at 38.5%, followed by Academia, Think-tanks or Research Institutions at 30.4%, and Civil Society, Non-Governmental Organisations or Media at 14.3%. ASEAN's private sector

(Business or Finance) was represented by 11.1%. The smallest representation came from respondents affiliated with Regional or International Organisations at 5.8%.



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

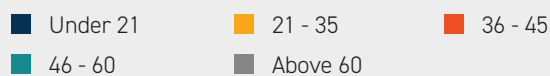
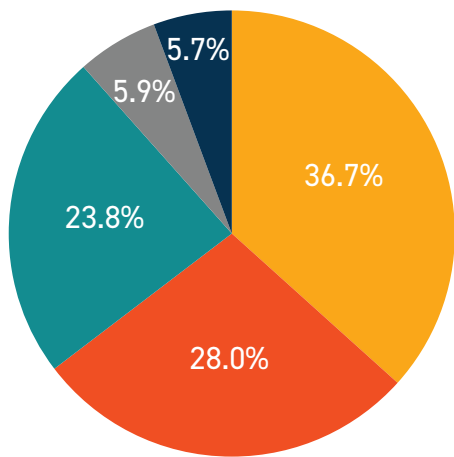
Q2 What is your affiliation?

Country	Academia, Think-Tanks, or Research Institutions	Business or Finance	Government	Civil Society, Non-Governmental Organisations, or Media	Regional or International Organisations
ASEAN	30.4%	11.1%	38.5%	14.3%	5.8%
Brunei	20.8%	13.2%	43.4%	17.0%	5.7%
Cambodia	22.2%	24.7%	25.9%	18.5%	8.6%
Indonesia	51.9%	16.8%	10.7%	15.3%	5.3%
Laos	22.7%	11.4%	63.6%	2.3%	0.0%
Malaysia	37.0%	14.1%	20.7%	21.5%	6.7%
Myanmar	33.1%	2.6%	45.1%	15.1%	4.0%
Philippines	22.0%	4.0%	65.3%	6.0%	2.8%
Singapore	31.1%	16.2%	20.7%	21.2%	10.8%
Thailand	32.5%	17.1%	30.8%	8.5%	11.1%
Vietnam	29.2%	22.2%	20.8%	21.5%	6.3%

AGE

In terms of age distribution, the largest age group remained the 21-35 years old at 36.7%. This is followed by the 36 - 45 years old group at 28.0%. According to the *ASEAN Statistical Yearbook 2021*, these two age groups form more than half of ASEAN's total population. The third largest group was the 46-60 years old

group at 23.8%, followed by those above 60 years old at 5.9%. Of note, the proportion of respondents below age 21 (Gen Z) doubled this year from 2.2% to 5.7% with the biggest proportion from Myanmar. In the above 60 years old category, Singapore dominated at 18.9%, co-related with its aging demographics.



Q3 What age group do you belong to?

Country	Under 21	21 - 35	36 - 45	46 - 60	Above 60
ASEAN	5.7%	36.7%	28.0%	23.8%	5.9%
Brunei	5.7%	56.6%	24.5%	13.2%	0.0%
Cambodia	3.7%	29.6%	35.8%	29.6%	1.2%
Indonesia	0.8%	45.0%	29.8%	21.4%	3.1%
Laos	6.8%	29.5%	56.8%	6.8%	0.0%
Malaysia	0.7%	29.6%	22.2%	34.8%	12.6%
Myanmar	12.3%	58.3%	16.9%	11.1%	1.4%
Philippines	8.0%	27.3%	31.3%	30.0%	3.5%
Singapore	1.8%	18.9%	22.5%	37.8%	18.9%
Thailand	0.9%	30.8%	31.6%	23.9%	12.8%
Vietnam	2.8%	40.3%	43.1%	13.2%	0.7%

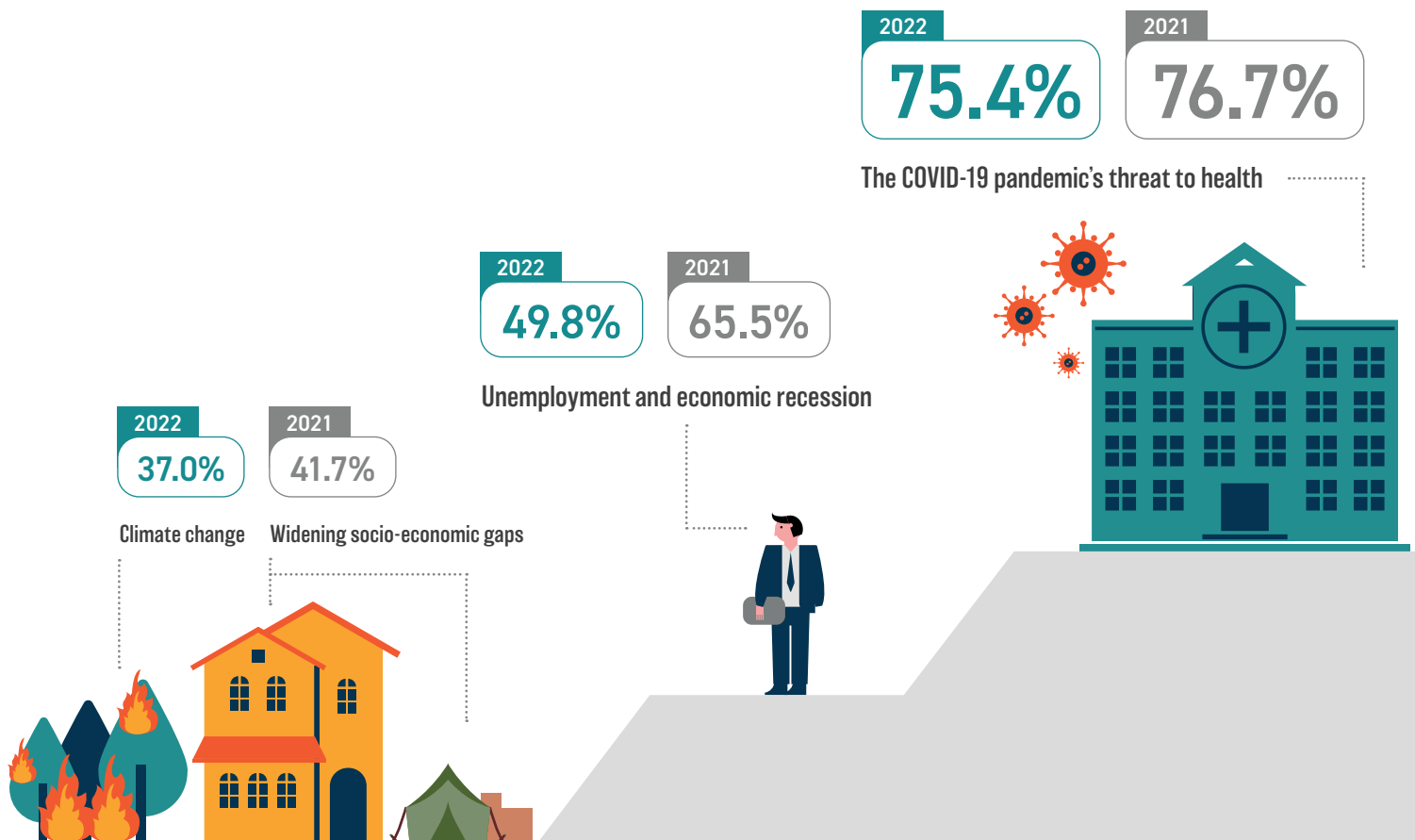
SECTION II: Regional Outlook and Developments

This section examines the key challenges and main preoccupations of the region of the preceding year. **Weighting was applied in this section for both 2021 and 2022 results in order to provide trend analysis.**

TOP THREE CHALLENGES FACING SOUTHEAST ASIA

COVID-19's threat to health continues to preoccupy Southeast Asians topping the rankings at 75.4% followed by the risks of unemployment and economic recession at 49.8%. The third most important issue for Southeast Asia is the urgency in addressing climate change and the extreme weather events that have battered the region in 2021. Climate change garnered 37.0% of support from respondents, overtaking the third ranked challenge last year which was widening socio-economic gaps and rising income disparity. The Philippines (52.0%) and Vietnam (53.5%) gave higher weightages to climate change as they felt the impacts of extreme weather events more keenly than the rest of the ASEAN member states. This is similar with other climate-related surveys where the Philippines' and Vietnam's climate concerns are more elevated compared with the rest of Southeast Asia.

At the country-level, all respondents chose COVID-19's threat to public health as the region's top challenge, except for Myanmar. Deterioration of human rights was Myanmar's top choice at 76.6%, a reflection of the people's suffering amidst the ongoing crisis in the country since 1 February 2021. This is followed by COVID-19 threat at second place (58.3%) and domestic political instability closely at third place (58.0%). Myanmar respondents' views of human rights worsened by more than ten times from 7.1% in 2021 to 76.6% in 2022. Although the question was directed at regional challenges, domestic preoccupation clearly made their way into respondents' choices.



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

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

2021								
Country	Deteriorating human rights conditions	Domestic political instability	Increased military tensions arising from potential flashpoints	Climate change and more intense and frequent weather events	Terrorism	The COVID-19 pandemic's threat to health	Unemployment and economic recession	Widening socio-economic gaps and rising income disparity
ASEAN	13.8%	31.8%	28.2%	36.7%	5.5%	76.7%	65.5%	41.7%
Brunei	12.1%	12.1%	33.3%	39.4%	9.1%	69.7%	78.8%	45.5%
Cambodia	23.1%	30.8%	30.8%	42.3%	0.0%	76.9%	53.8%	42.3%
Indonesia	15.5%	31.8%	26.4%	29.5%	5.4%	84.5%	67.4%	39.5%
Laos	10.0%	27.5%	7.5%	17.5%	12.5%	90.0%	85.0%	50.0%
Malaysia	16.2%	48.7%	23.9%	22.2%	2.6%	71.8%	70.1%	44.4%
Myanmar	7.1%	45.5%	13.5%	29.5%	9.6%	87.8%	69.9%	37.2%
Philippines	13.4%	11.9%	37.3%	59.7%	3.0%	80.6%	65.7%	28.4%
Singapore	6.3%	36.7%	33.5%	45.6%	7.6%	63.3%	55.1%	51.9%
Thailand	31.3%	52.7%	16.8%	19.8%	3.1%	64.9%	55.0%	56.5%
Vietnam	3.4%	20.0%	59.4%	61.7%	1.7%	77.7%	54.3%	21.7%

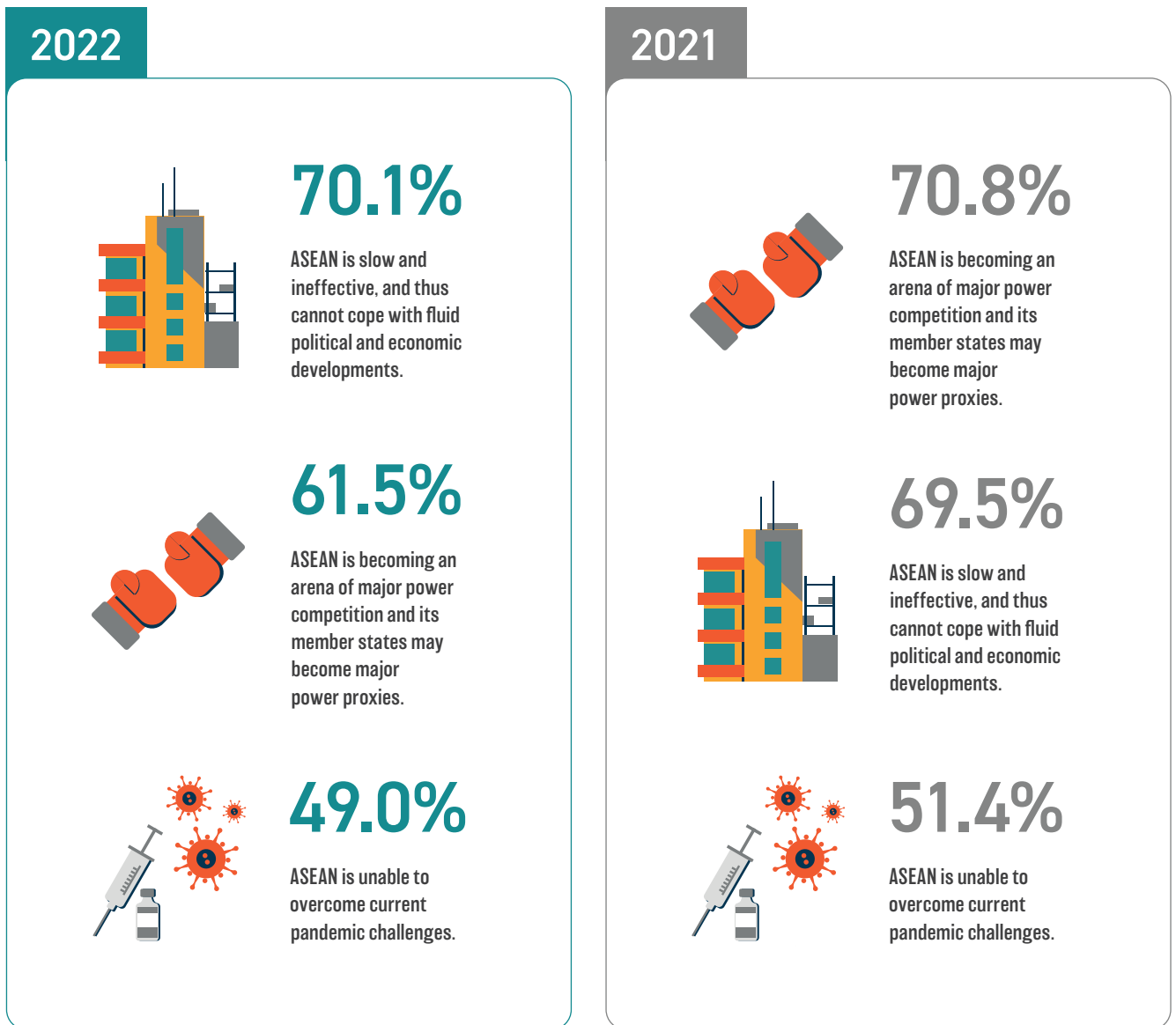
TOP THREE CONCERNS ABOUT ASEAN

Southeast Asians continue to express their frustrations with ASEAN as a slow and ineffective organisation, unable to cope with fluid political and economic developments at an overwhelming 70.1%. This concern overtook last year's top concern which was that of ASEAN becoming an arena of major power competition and its member states being used as a proxy in major power competition. This concern became the second-ranked concern this year at 61.5%. Concerns about ASEAN's inability to overcome current pandemic challenges maintained third place this year at 49.0%.

The view of ASEAN being slow and ineffective was prevalent in seven out of ten ASEAN member states, with the exception of Laos, Vietnam and Cambodia. Laos and Vietnam viewed ASEAN's inability to fend off major power competition in the region as their top concern. Interestingly, Cambodia made

ASEAN disunity its top choice this year at 64.2% but the biggest increase in concern registered was Indonesia where this view almost doubled from 26.4% in 2021 to 45.8% this year.

We note the jump in opinion about ASEAN's relevance in the new world order from 22.0% in 2021 to 32.2% this year. Concerns about ASEAN's relevance saw the highest jumps from Cambodia from 15.4% (2021) to 43.2% (2022), Myanmar from 17.3% (2021) to 41.4% (2022) and Vietnam from 24.0% (2021) to 37.5% (2022). The strength of this view is also intensified in Thailand from 16.8% (2021) to 36.8% (2022). On the other hand, maritime Southeast Asian countries - Brunei, Indonesia, Malaysia, the Philippines, and Singapore - maintained their ratings with slight differentials in opinion of between 5% - 7% on the issue of ASEAN's relevance.



10% weighting was applied to 2021 data resulting in a change of results and rankings.

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

2022						
Country	ASEAN is becoming an arena of major power competition and its member states may become major power proxies	ASEAN is becoming increasingly disunited	ASEAN is becoming irrelevant in the new world order	ASEAN is elitist and disconnected from ordinary people	ASEAN is slow and ineffective, and thus cannot cope with fluid political and economic developments	ASEAN is unable to overcome current pandemic challenges
ASEAN	61.5%	48.2%	32.2%	39.0%	70.1%	49.0%
Brunei	60.4%	52.8%	30.2%	39.6%	71.7%	45.3%
Cambodia	56.8%	64.2%	43.2%	37.0%	51.9%	46.9%
Indonesia	64.9%	45.8%	30.5%	45.8%	64.9%	48.1%
Laos	79.5%	27.3%	20.5%	22.7%	70.5%	79.5%
Malaysia	54.8%	41.5%	28.1%	45.9%	71.1%	58.5%
Myanmar	33.1%	33.7%	41.4%	61.1%	90.6%	40.0%
Philippines	65.5%	52.5%	24.5%	26.8%	74.3%	56.5%
Singapore	67.6%	60.4%	29.3%	27.5%	79.7%	35.6%
Thailand	59.8%	47.9%	36.8%	51.3%	65.8%	38.5%
Vietnam	72.9%	55.6%	37.5%	31.9%	61.1%	41.0%

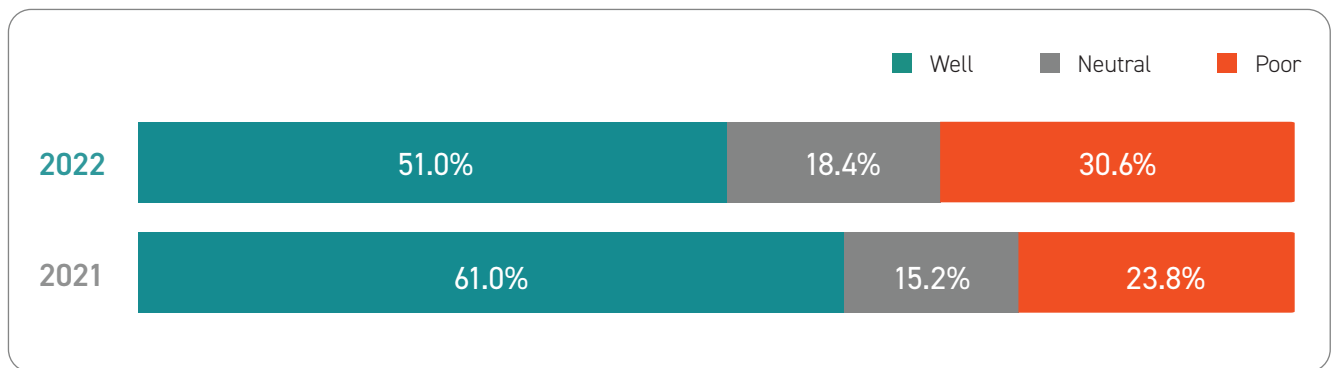
2021						
Country	ASEAN is becoming an arena of major power competition and its member states may become major power proxies	ASEAN is becoming increasingly disunited	ASEAN is becoming irrelevant in the new world order	ASEAN is elitist and disconnected from ordinary people	ASEAN is slow and ineffective, and thus cannot cope with fluid political and economic developments	ASEAN is unable to overcome current pandemic challenges
ASEAN	70.8%	44.9%	22.0%	41.3%	69.5%	51.4%
Brunei	87.9%	45.5%	30.3%	39.4%	60.6%	36.4%
Cambodia	84.6%	53.8%	15.4%	50.0%	61.5%	34.6%
Indonesia	62.0%	26.4%	23.3%	49.6%	66.7%	72.1%
Laos	60.0%	37.5%	17.5%	47.5%	70.0%	67.5%
Malaysia	59.0%	44.4%	25.6%	47.9%	69.2%	53.8%
Myanmar	71.2%	26.9%	17.3%	43.6%	75.0%	66.0%
Philippines	76.1%	34.3%	25.4%	40.3%	68.7%	55.2%
Singapore	72.8%	60.8%	24.7%	24.7%	74.7%	42.4%
Thailand	53.4%	52.7%	16.8%	51.9%	77.1%	48.1%
Vietnam	81.1%	66.9%	24.0%	18.3%	71.4%	38.3%

GOVERNMENT'S PERFORMANCE IN ADDRESSING THE COVID-19 PANDEMIC

Perhaps due to the Delta variant that wreaked havoc in the region in 2021, disapproval of regional governments' COVID-19 handling increased from 23.8% in 2021 to 30.6% in 2022. The share of respondents who said that their governments performed very poorly more than doubled from 7.1% to 15.9%. Those who felt that their governments performed well or adequately dropped by ten percentage points from 61.0% to 51.0%. The share of fence sitters who were neutral about their government's handling of the pandemic saw a slight increase from 15.2% to 18.4%.

Bruneians were almost unanimous in their support of their government's handling with 98.1% followed by Singaporeans of

whom 87.8% thought their governments did well. Conversely, the Vietnamese government's "Poor" ratings increased dramatically from 1.1% last year to 23.7% this year. Vietnam was highly admired at the start of the pandemic for its efficient handling of the outbreak but its slow national vaccination roll-out in 2021 may have resulted in higher disapproval ratings. Vietnamese numbers for the neutral category also increased from 2.3% to 34.0% indicating that while they don't disapprove, they are not exactly satisfied with the outcome either. It goes without saying that Myanmar respondents' unhappiness with their country's political situation at this stage were unanimous in their disapproval of the State Administration Council at 93.4%.



Q6 How has your government performed this year in addressing the COVID-19 pandemic?

Country	Well		Adequate		Neutral		Poor		Very Poor	
	2021	2022	2021	2022	2021	2022	2021	2022	2021	2022
ASEAN	28.6%	23.2%	32.4%	27.8%	15.2%	18.4%	16.7%	14.7%	7.1%	15.9%
Brunei	72.7%	66.0%	21.2%	32.1%	3.0%	0.0%	0.0%	1.9%	3.0%	0.0%
Cambodia	26.9%	34.6%	53.8%	33.3%	11.5%	21.0%	3.8%	4.9%	3.8%	6.2%
Indonesia	4.7%	25.2%	19.4%	36.6%	25.6%	26.0%	35.7%	10.7%	14.7%	1.5%
Laos	22.5%	15.9%	32.5%	20.5%	22.5%	38.6%	17.5%	18.2%	5.0%	6.8%
Malaysia	14.5%	10.4%	40.2%	22.2%	17.1%	15.6%	27.4%	27.4%	0.9%	24.4%
Myanmar	5.8%	0.6%	37.2%	1.4%	25.0%	4.6%	23.1%	10.3%	9.0%	83.1%
Philippines	6.0%	12.0%	19.4%	29.5%	20.9%	19.0%	35.8%	26.0%	17.9%	13.5%
Singapore	43.7%	40.5%	48.7%	47.3%	5.7%	6.8%	1.9%	4.1%	0.0%	1.4%
Thailand	13.0%	14.5%	31.3%	24.8%	19.1%	18.8%	21.4%	26.5%	15.3%	15.4%
Vietnam	76.0%	12.5%	20.6%	29.9%	2.3%	34.0%	0.0%	17.4%	1.1%	6.3%

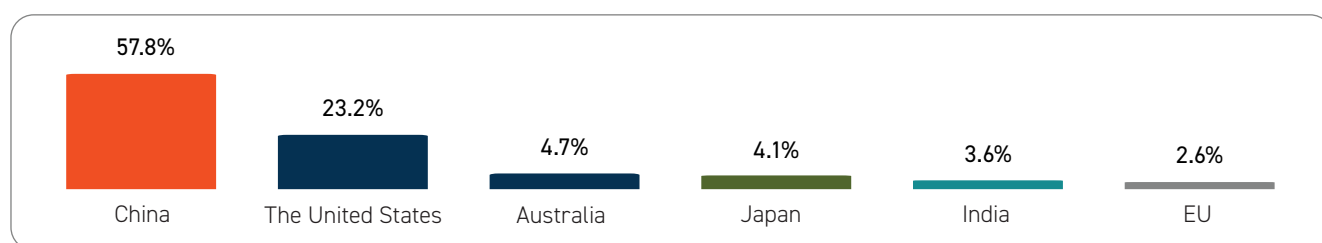
10% weighting was applied to 2021 data resulting in a change of results.

ASSESSMENT OF DIALOGUE PARTNERS' ASSISTANCE ON COVID-19

As of January 13, nine out of the ten ASEAN member states have achieved at least 40% full vaccination of their populations according to aggregated data on the website *Reporting ASEAN*. The target set by the World Health Organization by the end of 2021 was for all countries to have at least 40% of their populations fully vaccinated. Due to its current crisis, Myanmar only managed to attain 34.39% full vaccination rate (as at 5 February 2022 on *Reporting ASEAN*). All ASEAN countries have used either Sinopharm or Sinovac as part of their national vaccination roll-outs whether by purchase agreement or through bilateral donations.

The region is of the view that China has given the strongest COVID-19 vaccine support (57.8%). The runner up – the United States – was ranked at a distant second of 23.2%, followed by Australia at third place (4.7%), Japan at fourth place (4.1%), India at fifth place (3.6%) and the EU at sixth place (2.6%).

A June 2021 study by ISEAS found that China donated 7.3 million doses to Southeast Asia and countries had purchased 203 million doses. According to the State Department website, the US had donated 23 million doses by August 2021. President Xi upped the game by pledging an additional 150 million doses to ASEAN in November 2021. The high-profile 2021 visits of members of the Biden Administration to the various countries in the region that brought COVID-19 supplies of vaccines, masks, and ventilators were overshadowed. Instead, the focus of attention was on the number of vaccines either donated or sold by China to the regional countries. Cambodia gave 91.4% of its vote to China. Vietnam was the only exception out of the grouping that voted the US as ASEAN's top dialogue partner in vaccine diplomacy. Vice President Kamala Harris' highly publicised visit in August 2021 may have given the US an edge up in Vietnam's ratings (52.8%).



Q7 Which ASEAN Dialogue Partner has provided the most COVID-19 vaccine support to the region?

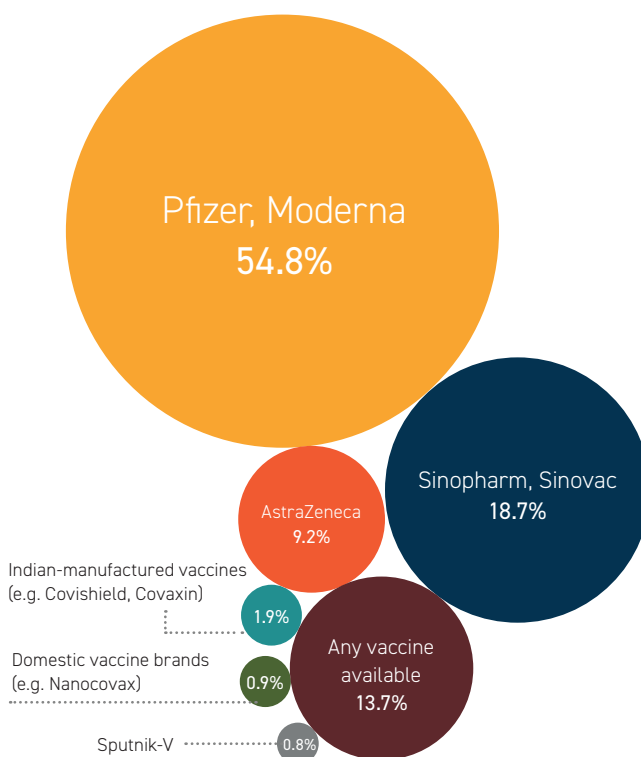
Country	Australia	Canada	China	The European Union	India	Japan	New Zealand	Republic of Korea	Russia	The United States	The United Kingdom
ASEAN	4.7%	0.3%	57.8%	2.6%	3.6%	4.1%	1.1%	0.7%	0.4%	23.2%	1.5%
Brunei	20.8%	0.0%	64.2%	0.0%	0.0%	9.4%	3.8%	0.0%	0.0%	0.0%	1.9%
Cambodia	0.0%	0.0%	91.4%	1.2%	4.9%	1.2%	0.0%	0.0%	0.0%	1.2%	0.0%
Indonesia	2.3%	0.0%	68.7%	6.1%	0.8%	3.1%	2.3%	0.8%	0.8%	13.7%	1.5%
Laos	2.3%	2.3%	77.3%	0.0%	0.0%	2.3%	0.0%	0.0%	0.0%	13.6%	2.3%
Malaysia	1.5%	0.0%	64.4%	0.7%	4.4%	6.7%	0.7%	0.7%	0.0%	18.5%	2.2%
Myanmar	1.1%	0.0%	40.0%	2.6%	22.6%	4.0%	0.3%	2.3%	1.1%	25.4%	0.6%
Philippines	1.8%	0.8%	46.5%	1.8%	0.0%	3.5%	0.8%	0.8%	2.5%	40.8%	1.0%
Singapore	3.6%	0.0%	45.5%	5.0%	1.8%	1.8%	1.4%	0.0%	0.0%	40.1%	0.9%
Thailand	1.7%	0.0%	64.1%	0.0%	0.9%	2.6%	0.9%	1.7%	0.0%	25.6%	2.6%
Vietnam	11.8%	0.0%	16.0%	8.3%	0.7%	6.9%	0.7%	0.7%	0.0%	52.8%	2.1%

MOST PREFERRED VACCINE BRAND

The most trusted vaccine brands among Southeast Asians – selected by 54.8% of all respondents – are mRNA vaccines Pfizer and Moderna. They are most popular in Singapore (90.1%), followed by Myanmar (68.6%), Laos (65.9%) and Brunei (62.3%). Taking the second place is Chinese brands Sinopharm and Sinovac (18.7%). Chinese vaccines are most trusted in Cambodia (67.9%) and least trusted in Brunei (1.9%), Vietnam (4.2%), Singapore (4.5%) and Myanmar (5.1%). Intriguingly, the option of “any vaccine available” is selected by 13.7% of all respondents, significantly higher than the vote share of specific brands of AstraZeneca (9.2%), Indian-manufactured vaccines (1.9%), domestic vaccines (0.9%) and Sputnik-V (0.8%).

China’s vaccine diplomacy has proven to be most effective in Cambodia. The level of recognition of Chinese vaccine support is very high among the Cambodians (67.9%), reflecting China’s status as Cambodia’s dominant vaccine supplier. However, with the clear exception of Cambodia, the recognition of Chinese vaccine support – reflected in the previous question (Q7) – does not necessarily correlate with the popularity of its vaccine brands among the recipient populations. For example, though more than two-thirds of respondents in Indonesia (68.7%) and Malaysia (64.4%) identify China as the country that has provided the most vaccine support to the region, only 35.1% in Indonesia and 23.7% in Malaysia prefer Chinese vaccines over others. A possible reason could be concerns about the efficacy of Chinese vaccines, especially compared to the newer mRNA vaccines. This was seen in Laos, where a majority of Lao respondents (65.9%) prefer mRNA vaccines, despite the fact that China is

the largest vaccine supplier to the country and 77.3% of Lao respondents think that China has provided the most vaccine support to the region (see previous question).



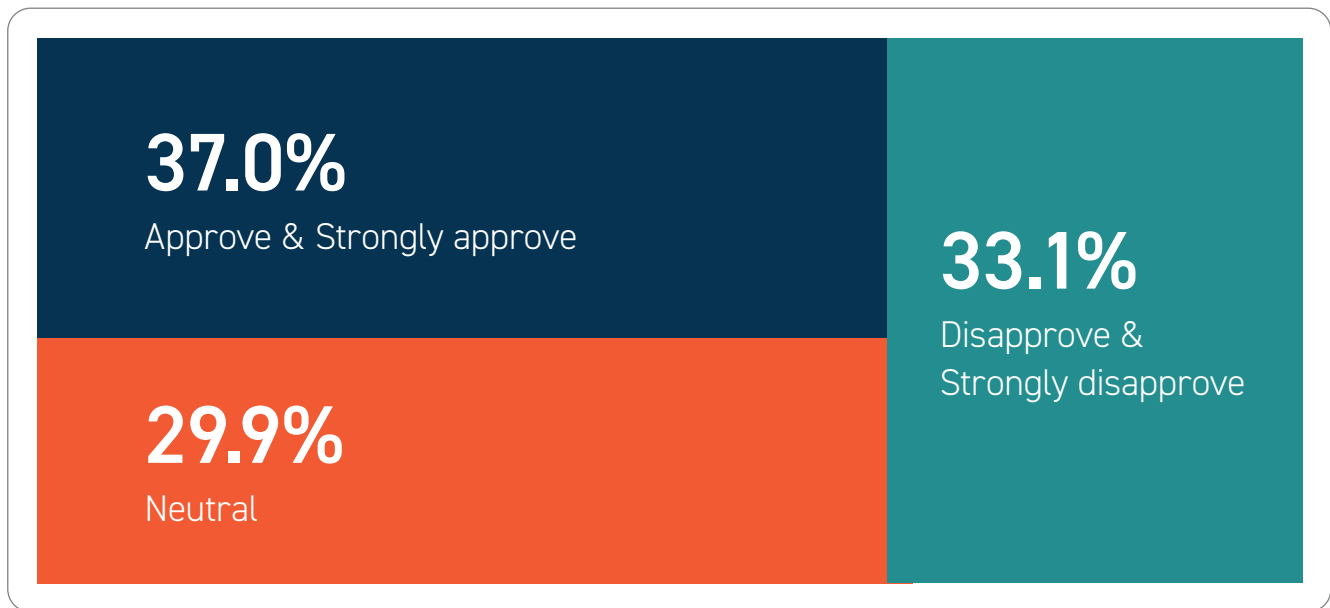
Q8 Which vaccine brand do you trust most?

Country	Sinopharm, Sinovac	Pfizer, Moderna	AstraZeneca	Sputnik-V	Indian-manufactured vaccines (e.g. Covishield, Covaxin)	Domestic vaccine brands (e.g. Nanocovax)	Any vaccine available
ASEAN	18.7%	54.8%	9.2%	0.8%	1.9%	0.9%	13.7%
Brunei	1.9%	62.3%	5.7%	0.0%	0.0%	0.0%	30.2%
Cambodia	67.9%	16.0%	1.2%	0.0%	2.5%	0.0%	12.3%
Indonesia	35.1%	34.4%	9.9%	1.5%	0.8%	1.5%	16.8%
Laos	18.2%	65.9%	4.5%	2.3%	0.0%	0.0%	9.1%
Malaysia	23.7%	48.1%	11.9%	0.0%	3.0%	0.7%	12.6%
Myanmar	5.1%	68.6%	4.6%	0.0%	11.7%	0.3%	9.7%
Philippines	9.0%	54.5%	6.5%	4.0%	0.0%	0.0%	26.0%
Singapore	4.5%	90.1%	0.0%	0.0%	0.0%	0.5%	5.0%
Thailand	17.1%	52.1%	23.1%	0.0%	0.9%	0.9%	6.0%
Vietnam	4.2%	55.6%	24.3%	0.7%	0.7%	4.9%	9.7%

ASEAN'S RESPONSE TO THE MYANMAR CRISIS

Southeast Asians are equally split in their views of ASEAN's response to the Myanmar crisis with 37.0% saying they either "Approve" or "Strongly Approve"; 29.9% saying they are neutral; and 33.1% who either "Disapprove" or "Strongly Disapprove". At the country-level, putting Myanmar's own overwhelming disapproval ratings (78.8%) aside, the country that registered the next highest level of disapproval was Thailand at 39.3%, followed by Singapore at 37.0%. Brunei was most approving

of ASEAN's response at 58.5% presumably because they were the ASEAN Chair last year and had been handed this hot-potato crisis to resolve. Indonesians were second most approving of ASEAN's response at 44.3%. This could be due to the active shuttle diplomacy demonstrated by Indonesian Foreign Minister Retno Marsudi in the early days of the crisis. The third most approving of ASEAN actions is Singapore at 43.7%.



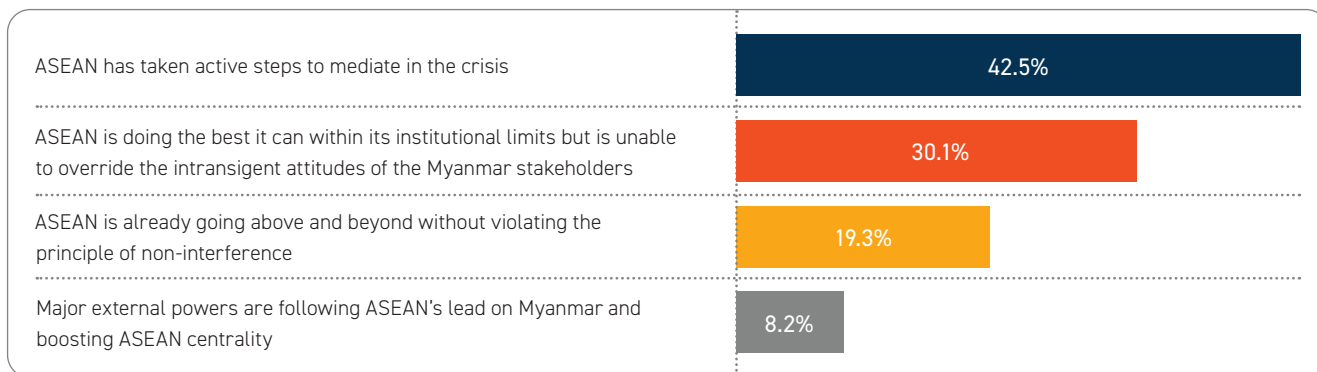
Q9 Do you approve of ASEAN's response to the Myanmar crisis?

Country	Strongly approve	Approve	Neutral	Disapprove	Strongly disapprove
ASEAN	11.3%	25.7%	29.9%	18.7%	14.4%
Brunei	18.9%	39.6%	18.9%	20.8%	1.9%
Cambodia	16.0%	27.2%	30.9%	17.3%	8.6%
Indonesia	15.3%	29.0%	35.1%	16.8%	3.8%
Laos	9.1%	29.5%	45.5%	11.4%	4.5%
Malaysia	16.3%	18.5%	31.1%	14.8%	19.3%
Myanmar	4.0%	7.4%	9.7%	17.7%	61.1%
Philippines	4.5%	20.5%	39.0%	27.3%	8.8%
Singapore	11.7%	32.0%	19.4%	19.4%	17.6%
Thailand	11.1%	24.8%	24.8%	28.2%	11.1%
Vietnam	6.3%	28.5%	44.4%	13.9%	6.9%

REASONS FOR APPROVING ASEAN'S MYANMAR RESPONSE

Of the 517 respondents who chose either "Approve" or "Strongly Approve", 42.5% say that ASEAN had taken active steps to mediate in the crisis such as by convening the Leaders' Meeting in April 2021, agreeing on the Five-Point Consensus and the subsequent appointment of the ASEAN Chair's Special Envoy. The second most popular reason given is that ASEAN is doing its best given institutional limits but is unable to override intransigent attitudes of Myanmar stakeholders, thereby blaming factors that are beyond ASEAN's control. Brunei

(51.6%) and Singapore (45.4%) are the two outlier members citing ASEAN's institutional limits and its inability to override intransigence as their top reason for their satisfaction with ASEAN. Respondents from Brunei and Singapore would have liked to see more done but are cognizant of ASEAN's limitations. Cambodia, on the hand, felt that ASEAN was already going above and beyond its call of duty without violating the principle of non-interference (34.3%). This is Cambodia's second ranked reason for approval of ASEAN's actions.



Q10 Why do you approve of ASEAN's response?

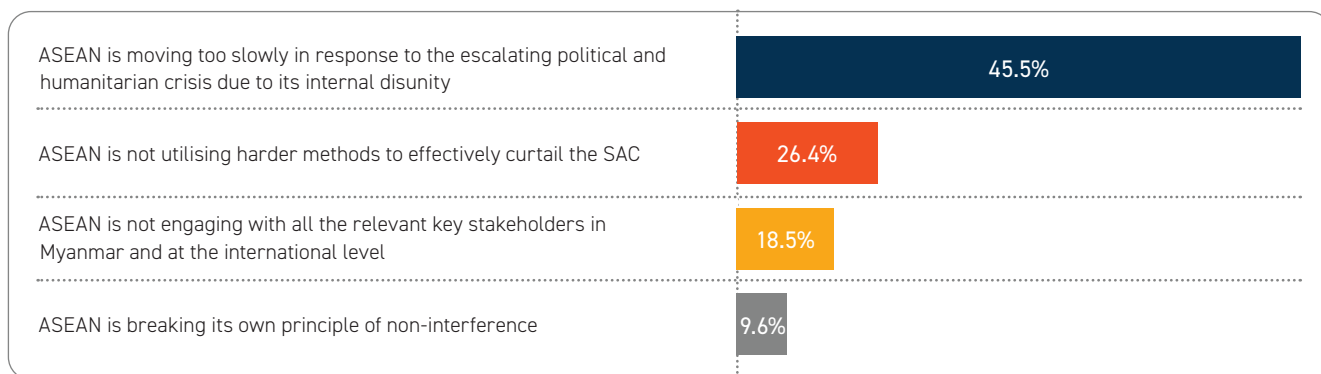
Answered: 517 (Respondents who chose the "Strongly approve" and "Approve" options in Q9)

Country	ASEAN has taken active steps to mediate in the crisis (e.g., Leaders' Meeting, Five-Point Consensus, appointment of Special Envoy)	ASEAN is already going above and beyond without violating the principle of non-interference	ASEAN is doing the best it can within its institutional limits but is unable to override the intransigent attitudes of the Myanmar stakeholders	Major external powers are following ASEAN's lead on Myanmar and boosting ASEAN centrality
ASEAN	42.5%	19.3%	30.1%	8.2%
Brunei	35.5%	9.7%	51.6%	3.2%
Cambodia	37.1%	34.3%	20.0%	8.6%
Indonesia	62.1%	6.9%	29.3%	1.7%
Laos	29.4%	29.4%	23.5%	17.6%
Malaysia	40.4%	31.9%	23.4%	4.3%
Myanmar	45.0%	10.0%	30.0%	15.0%
Philippines	56.0%	11.0%	28.0%	5.0%
Singapore	38.1%	10.3%	45.4%	6.2%
Thailand	45.2%	21.4%	21.4%	11.9%
Vietnam	36.0%	28.0%	28.0%	8.0%

REASONS FOR DISAPPROVING ASEAN'S MYANMAR RESPONSE

Of the 691 respondents who chose either "Disapprove" or "Strongly Disapprove", 45.5% of ASEAN respondents say that ASEAN was too slow in its response to the escalating political and humanitarian crisis due to its internal disunity. Brunei (75.0%), Indonesia (55.6%), Laos (42.9%), the Philippines (57.6%), Singapore (43.9%), Thailand (52.2%) and Vietnam (33.3%) share this view. Another 26.4% say that it was not utilising harder methods in dealing with the crisis such as suspending membership and using sanctions to curtail the

State Administration Council. Of this second group favouring harder methods, Malaysia and Vietnam (Vietnam's second choice tied with ASEAN's slow response) are the outliers. Myanmar respondents appear split between wanting to see harder methods employed (39.9%) and ASEAN's lack of speed (33.3%). Of this grouping, Cambodia's top reason for disapproval was that it wanted to see ASEAN engage with all relevant stakeholders in Myanmar and at the international level (33.3%).

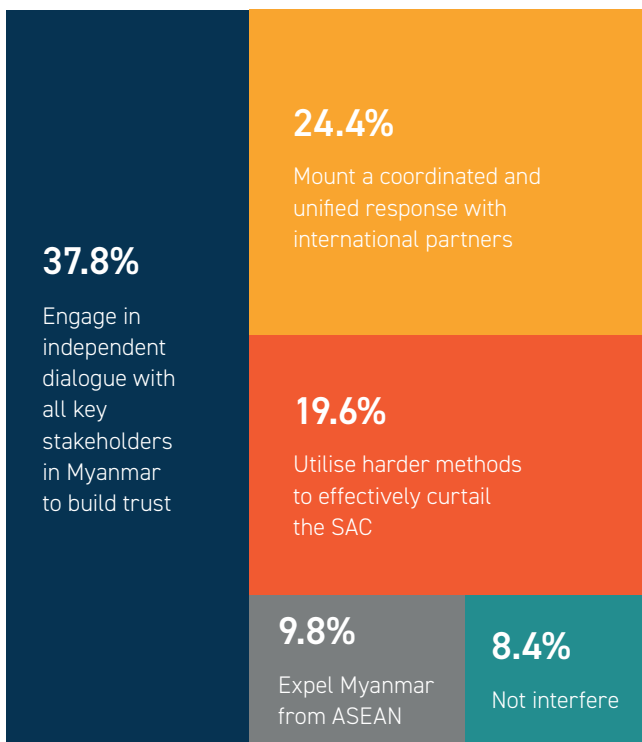


Q11 Why do you disapprove of ASEAN's response?

Answered: 691 (Respondents who chose the "Strongly disapprove" and "Disapprove" options in Q9)

Country	ASEAN is moving too slowly in response to the escalating political and humanitarian crisis due to its internal disunity	ASEAN is not engaging with all the relevant key stakeholders in Myanmar and at the international level	ASEAN is not utilising harder methods (e.g., suspension, targeted sanctions) to effectively curtail the SAC	ASEAN is breaking its own principle of non-interference
ASEAN	45.5%	18.5%	26.4%	9.6%
Brunei	75.0%	0.0%	16.7%	8.3%
Cambodia	28.6%	33.3%	28.6%	9.5%
Indonesia	55.6%	18.5%	25.9%	0.0%
Laos	42.9%	0.0%	0.0%	57.1%
Malaysia	32.6%	21.7%	43.5%	2.2%
Myanmar	33.3%	22.5%	39.9%	4.3%
Philippines	57.6%	23.6%	17.4%	1.4%
Singapore	43.9%	22.0%	32.9%	1.2%
Thailand	52.2%	19.6%	26.1%	2.2%
Vietnam	33.3%	23.3%	33.3%	10.0%

MOVING THE MYANMAR ISSUE FORWARD



All respondents, regardless of their responses made in the last two questions, were asked to select one out of five options on how to move the Myanmar issue forward.

37.8% want to see ASEAN engage in independent trust-building dialogue with all key stakeholders in Myanmar. This is perhaps in recognition of the polarity in differences between different groups in the country. The second most preferred option is for ASEAN to mount a coordinated and unified response with international partners (24.4%), followed by ASEAN employing harder methods of suspension, sanctions etc to curtail the State Administration Council (19.6%). Myanmar respondents are the strongest proponents of the third-ranked option at 43.4%. They are also the strongest in their views about expelling Myanmar from ASEAN at 21.4%. Conversely, Laos holds the strongest views among the ten countries that ASEAN should not interfere with Myanmar's domestic policies (22.7%).

Q12 To move the issue forward, ASEAN should:

Country	Engage in independent dialogue with all key stakeholders in Myanmar to build trust	Mount a coordinated and unified response with international partners	Utilise harder methods (e.g., suspension, targeted sanctions) to effectively curtail the SAC	Expel Myanmar from ASEAN and re-admit it when free and fair elections have taken place	Not interfere with Myanmar's domestic politics
ASEAN	37.8%	24.4%	19.6%	9.8%	8.4%
Brunei	50.9%	24.5%	15.1%	5.7%	3.8%
Cambodia	43.2%	21.0%	16.0%	4.9%	14.8%
Indonesia	42.7%	24.4%	22.1%	6.9%	3.8%
Laos	36.4%	31.8%	2.3%	6.8%	22.7%
Malaysia	34.8%	15.6%	19.3%	16.3%	14.1%
Myanmar	22.0%	9.1%	43.4%	21.4%	4.0%
Philippines	38.8%	38.5%	11.5%	4.5%	6.8%
Singapore	33.3%	23.9%	23.9%	14.4%	4.5%
Thailand	39.3%	26.5%	21.4%	10.3%	2.6%
Vietnam	36.8%	28.5%	20.8%	6.9%	6.9%

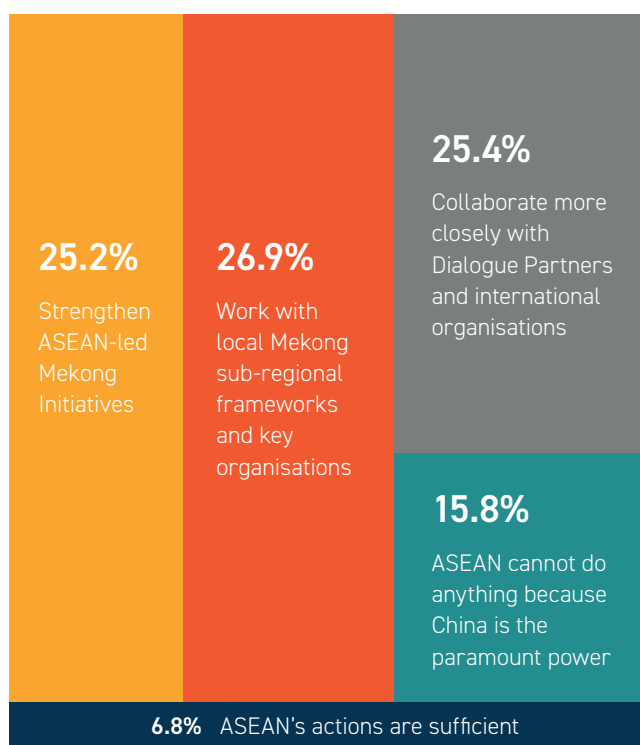
VIEWS ON MEKONG RIVER ISSUES

Respondents are divided on how ASEAN should respond to the Mekong River issues.

The largest group of respondents (26.9%) agree to work with local Mekong sub-regional frameworks and key organisations in responding to crises in the Mekong River Delta. This preference is most pronounced among respondents from Brunei (39.6%), Singapore (30.6%), Malaysia (29.6%), Laos (29.5%), and Cambodia (28.4%). Many also think that ASEAN must collaborate closely with its Dialogue Partners and international organisations (25.4%), particularly among those from Vietnam (41.0%), the Philippines (33.5%), and Thailand (29.1%).

Although only 25.2% of overall respondents prefer to see ASEAN strengthen ASEAN-led Mekong Initiatives, this view is the most popular among respondents from Indonesia (36.6%).

Of note, more than half of the respondents from Myanmar think that ASEAN cannot do anything because China is the paramount power in the Mekong region, signifying pessimism of ASEAN's influence in the Mekong sub-region. Among this cohort, those under 21 years old (58.1%) and between 21-35 years old (54.9%) are more likely to agree with this view than the older age groups.



Q13 How should ASEAN respond to the Mekong River issues?

Country	ASEAN's actions are sufficient	Strengthen ASEAN-led Mekong Initiatives	Work with local Mekong sub-regional frameworks and key organisations	Collaborate more closely with Dialogue Partners and international organisations	ASEAN cannot do anything because China is the paramount power in the Mekong region
ASEAN	6.8%	25.2%	26.9%	25.4%	15.8%
Brunei	3.8%	22.6%	39.6%	22.6%	11.3%
Cambodia	13.6%	24.7%	28.4%	21.0%	12.3%
Indonesia	6.9%	36.6%	24.4%	26.7%	5.3%
Laos	11.4%	25.0%	29.5%	25.0%	9.1%
Malaysia	11.1%	25.9%	29.6%	15.6%	17.8%
Myanmar	3.1%	6.0%	19.1%	19.4%	52.3%
Philippines	2.3%	32.8%	27.8%	33.5%	3.8%
Singapore	2.3%	26.6%	30.6%	20.3%	20.3%
Thailand	8.5%	25.6%	22.2%	29.1%	14.5%
Vietnam	4.9%	25.7%	17.4%	41.0%	11.1%

SECTION III: Major Powers' Regional Influence and Leadership

This section focuses on the strategic and economic influence of major powers in the region as well as their leadership credibility on global issues such as free trade and upholding international law. **Weighting was applied in this section for both 2021 and 2022 results in order to provide trend analysis.**

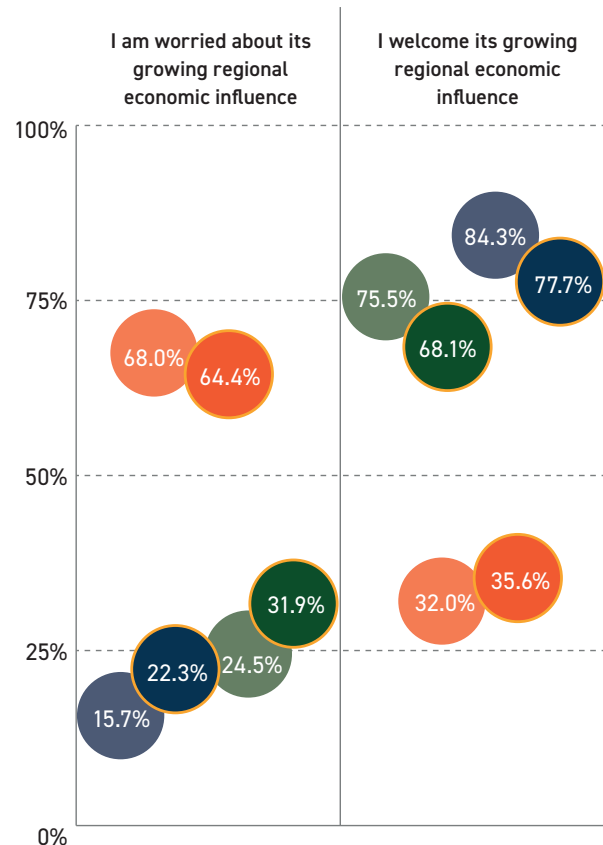
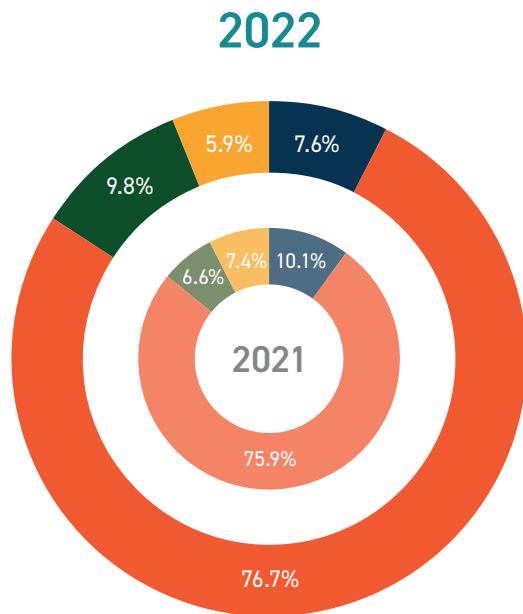
MOST INFLUENTIAL ECONOMIC POWER IN SOUTHEAST ASIA

China continues to be highly regarded as the most influential economic power by 76.7% of the respondents – a consistent trend since 2019. This is followed by the United States at 9.8% (an increase from 6.6% in 2021) and ASEAN (7.6%) respectively. The highest levels of recognition for China's economic influence are registered among respondents from Brunei (84.9%), Cambodia (84.0%), Laos (86.4%), Myanmar (83.4%), and Singapore (81.1%).

While China has consistently remained in the top rank, the US has gained significant ground in the last year from respondents across most ASEAN member states, particularly Malaysia, Myanmar, the Philippines, Singapore, and Thailand.

The region continues to be worried about China's growing regional economic influence, with 64.4% of respondents expressing this view, while 35.6% welcome its growing economic influence – particularly supported by Cambodia respondents. While there is generally a slight decrease in the level of anxiety about China's growing economic influence from 2021, an increase has been recorded among respondents from Laos, Myanmar, and Singapore.

On the flip side, most respondents welcome the growing regional economic influence of ASEAN (77.7%) and the US (68.1%), reflecting similar findings in 2021 and 2022.



■ ASEAN
■ China
■ The United States
■ Others

■ ASEAN
■ China
■ The US
■ 2022
■ 2022
■ 2022
■ 2021
■ 2021
■ 2021

10% weighting was applied to 2021 data resulting in a change of results.

Q14 In your view, which country/regional organisation is the most influential economic power in Southeast Asia?

Country	ASEAN		Australia		China		The European Union		India		Japan		Republic of Korea		The United States		The United Kingdom	
	2021	2022	2021	2022	2021	2022	2021	2022	2021	2022	2021	2022	2021	2022	2021	2022	2021	2022
ASEAN	10.1%	7.6%	0.5%	0.5%	75.9%	76.7%	1.7%	1.7%	0.1%	0.1%	4.1%	2.6%	1.0%	0.5%	6.6%	9.8%	N.A.	0.5%
BN	24.2%	9.4%	0.0%	0.0%	66.7%	84.9%	0.0%	0.0%	0.0%	0.0%	3.0%	1.9%	3.0%	0.0%	3.0%	1.9%	N.A.	1.9%
KH	3.8%	9.9%	3.8%	0.0%	80.8%	84.0%	7.7%	1.2%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	3.8%	4.9%	N.A.	0.0%
ID	13.2%	13.7%	0.0%	1.5%	70.5%	67.9%	2.3%	0.0%	0.0%	0.0%	6.2%	5.3%	1.6%	1.5%	6.2%	8.4%	N.A.	1.5%
LA	2.5%	2.3%	0.0%	0.0%	87.5%	86.4%	0.0%	6.8%	0.0%	0.0%	0.0%	0.0%	5.0%	0.0%	5.0%	4.5%	N.A.	0.0%
MY	9.4%	11.1%	0.9%	0.0%	76.9%	72.6%	2.6%	1.5%	0.0%	0.0%	3.4%	3.0%	0.0%	0.0%	6.8%	11.9%	N.A.	0.0%
MM	5.8%	2.6%	0.0%	0.0%	83.3%	83.4%	1.3%	1.4%	0.0%	0.0%	5.1%	4.3%	0.0%	1.4%	4.5%	6.0%	N.A.	0.9%
PH	14.9%	6.3%	0.0%	0.8%	59.7%	65.8%	1.5%	2.8%	0.0%	0.0%	13.4%	5.3%	0.0%	0.8%	10.4%	18.3%	N.A.	0.3%
SG	5.7%	3.6%	0.0%	0.0%	83.5%	81.1%	0.6%	1.4%	0.6%	0.0%	2.5%	1.8%	0.0%	0.0%	7.0%	12.2%	N.A.	0.0%
TH	4.6%	7.7%	0.8%	1.7%	84.7%	69.2%	0.8%	0.9%	0.0%	0.9%	3.8%	4.3%	0.0%	1.7%	5.3%	13.7%	N.A.	0.0%
VN	16.6%	9.7%	0.0%	0.7%	65.7%	71.5%	0.0%	0.7%	0.0%	0.0%	3.4%	0.7%	0.6%	0.0%	13.7%	16.7%	N.A.	0.0%

Q15 What is your view of this economic power's influence on your country?

Answered: 112 (Respondents who chose the "ASEAN" option in Q14), 1257 (Respondents who chose the "China" option in Q14), 195 (Respondents who chose the "The US" option in Q14)

Country	ASEAN				China				The United States			
	I am worried about its growing regional economic influence		I welcome its growing regional economic influence		I am worried about its growing regional economic influence		I welcome its growing regional economic influence		I am worried about its growing regional economic influence		I welcome its growing regional economic influence	
	2021	2022	2021	2022	2021	2022	2021	2022	2021	2022	2021	2022
ASEAN	15.7%	22.3%	84.3%	77.7%	68.0%	64.4%	32.0%	35.6%	24.5%	31.9%	75.5%	68.1%
BN	12.5%	40.0%	87.5%	60.0%	63.6%	55.6%	36.4%	44.4%	0.0%	0.0%	100.0%	100.0%
KH	0.0%	0.0%	100.0%	100.0%	47.6%	29.4%	52.4%	70.6%	0.0%	25.0%	100.0%	75.0%
ID	0.0%	33.3%	100.0%	66.7%	65.9%	60.7%	34.1%	39.3%	50.0%	45.5%	50.0%	54.5%
LA	0.0%	0.0%	100.0%	100.0%	48.6%	65.8%	51.4%	34.2%	50.0%	100.0%	50.0%	0.0%
MY	9.1%	0.0%	90.9%	100.0%	63.3%	55.1%	36.7%	44.9%	25.0%	37.5%	75.0%	62.5%
MM	22.2%	44.4%	77.8%	55.6%	76.9%	87.3%	23.1%	12.7%	42.9%	23.8%	57.1%	76.2%
PH	20.0%	4.0%	80.0%	96.0%	77.5%	76.4%	22.5%	23.6%	14.3%	13.7%	85.7%	86.3%
SG	22.2%	25.0%	77.8%	75.0%	66.7%	73.9%	33.3%	26.1%	36.4%	25.9%	63.6%	74.1%
TH	33.3%	33.3%	66.7%	66.7%	79.3%	66.7%	20.7%	33.3%	14.3%	18.8%	85.7%	81.3%
VN	37.9%	42.9%	62.1%	57.1%	90.4%	72.8%	9.6%	27.2%	12.5%	29.2%	87.5%	70.8%

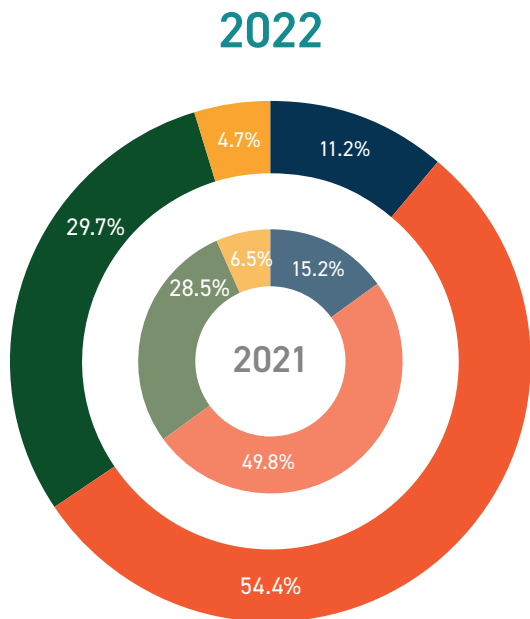
MOST INFLUENTIAL POLITICAL AND STRATEGIC POWER IN SOUTHEAST ASIA

China remains the most influential political and strategic power in Southeast Asia (54.4%), followed by the US (29.7%) and ASEAN (11.2%). China's political-strategic influence is perceived to be stronger by Cambodia (75.3%), Laos (75.0%), and Myanmar (70.9%) and has increased from 2021. On the other hand, the Philippines continue to be the only country that chose the US (51.0%) over China (37.0%), followed closely by Singapore (46.8%).

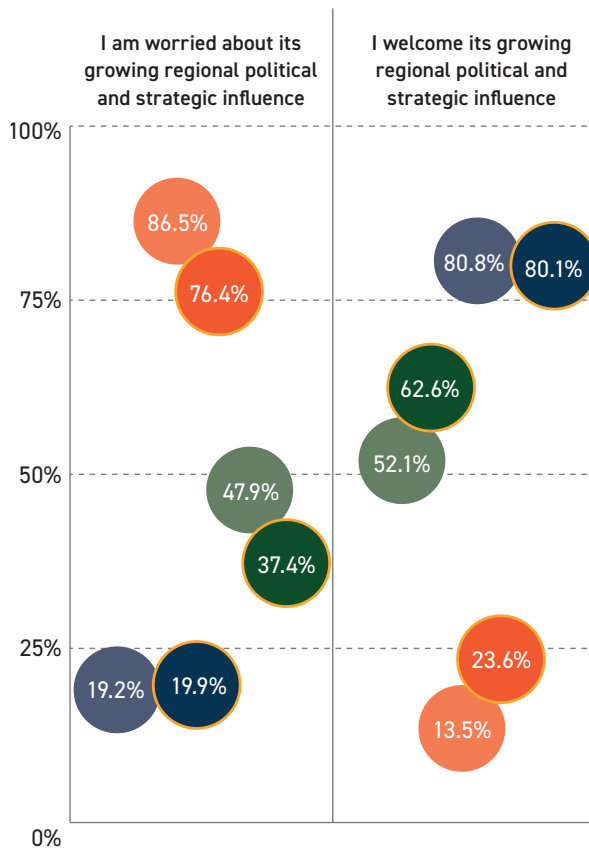
While the percentage share of the United States' strategic influence has grown, China's and ASEAN's shares have decreased slightly.

Similar to the sentiments last year, the region is generally worried about China's (76.4%) growing regional political and strategic influence, albeit with a slight decrease from 86.5% last year. In contrast, respondents welcomed ASEAN's (80.1%) and the US' (62.6%) growing regional political and strategic influence. The greatest acceptance for China's influence comes from Cambodia (54.1%), while Brunei, Myanmar, the Philippines, Singapore and Vietnam strongly support a growing US influence.

Despite the anxiety about China's growing regional political influence, the general level of concern has dropped compared to 2021 with the exception of Laos, Myanmar and Singapore, who have expressed greater apprehension towards China's ascent.



■ ASEAN
■ China
■ The United States
■ Others



■ ASEAN
■ China
■ The US
■ 2022
■ 2021
■ 2022
■ 2021

10% weighting was applied to 2021 data resulting in a change of results.

Q16 In your view, which country/regional organisation has the most political and strategic influence in Southeast Asia?

Country	ASEAN		Australia		China		The European Union		India		Japan		Republic of Korea		The United States		The United Kingdom	
	2021	2022	2021	2022	2021	2022	2021	2022	2021	2022	2021	2022	2021	2022	2021	2022	2021	2022
ASEAN	15.2%	11.2%	0.5%	0.8%	49.8%	54.4%	1.7%	0.8%	0.1%	0.2%	3.5%	1.4%	0.6%	0.6%	28.5%	29.7%	N.A.	0.8%
BN	21.2%	22.6%	3.0%	1.9%	42.4%	39.6%	3.0%	0.0%	0.0%	0.0%	0.0%	0.0%	3.0%	1.9%	27.3%	34.0%	N.A.	0.0%
KH	11.5%	7.4%	0.0%	0.0%	61.5%	75.3%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	26.9%	17.3%	N.A.	0.0%
ID	20.2%	16.0%	0.0%	3.1%	44.2%	38.2%	1.6%	2.3%	0.0%	0.8%	5.4%	1.5%	0.0%	1.5%	28.7%	35.1%	N.A.	1.5%
LA	12.5%	13.6%	0.0%	0.0%	65.0%	75.0%	0.0%	0.0%	0.0%	0.0%	12.5%	2.3%	2.5%	0.0%	7.5%	9.1%	N.A.	0.0%
MY	16.2%	20.0%	0.9%	1.5%	50.4%	51.1%	0.9%	0.7%	0.0%	0.0%	2.6%	0.7%	0.0%	0.0%	29.1%	24.4%	N.A.	1.5%
MM	12.2%	2.0%	0.6%	0.0%	51.9%	70.9%	4.5%	1.1%	1.3%	0.0%	7.1%	3.4%	0.6%	2.3%	21.8%	19.7%	N.A.	0.6%
PH	22.4%	8.3%	0.0%	0.3%	29.9%	37.0%	4.5%	1.3%	0.0%	0.3%	4.5%	1.8%	0.0%	0.0%	38.8%	51.0%	N.A.	0.3%
SG	10.8%	4.1%	0.6%	0.0%	44.3%	48.2%	0.6%	0.0%	0.0%	0.0%	1.9%	0.0%	0.0%	0.0%	41.8%	46.8%	N.A.	0.9%
TH	9.9%	7.7%	0.0%	0.9%	58.8%	55.6%	1.5%	2.6%	0.0%	0.9%	0.8%	2.6%	0.0%	0.0%	29.0%	27.4%	N.A.	2.6%
VN	15.4%	10.4%	0.0%	0.7%	49.7%	52.8%	0.6%	0.0%	0.0%	0.0%	0.0%	2.1%	0.0%	0.7%	34.3%	32.6%	N.A.	0.7%

Q17 What is your view of this power's political and strategic influence on your country?

Answered: 145 (Respondents who chose the "ASEAN" option in Q16), 878 (Respondents who chose the "China" option in Q16), 571 (Respondents who chose "The US" option in Q16)

Country	ASEAN				China				The United States			
	I am worried about its growing regional political and strategic influence		I welcome its growing regional political and strategic influence		I am worried about its growing regional political and strategic influence		I welcome its growing regional political and strategic influence		I am worried about its growing regional political and strategic influence		I welcome its growing regional political and strategic influence	
	2021	2022	2021	2022	2021	2022	2021	2022	2021	2022	2021	2022
ASEAN	19.2%	19.9%	80.8%	80.1%	86.5%	76.4%	13.5%	23.6%	47.9%	37.4%	52.1%	62.6%
BN	0.0%	16.7%	100.0%	83.3%	85.7%	81.0%	14.3%	19.0%	22.2%	27.8%	77.8%	72.2%
KH	0.0%	0.0%	100.0%	100.0%	81.3%	45.9%	18.8%	54.1%	71.4%	64.3%	28.6%	35.7%
ID	19.2%	33.3%	80.8%	66.7%	86.0%	66.0%	14.0%	34.0%	59.5%	50.0%	40.5%	50.0%
LA	80.0%	33.3%	20.0%	66.7%	69.2%	78.8%	30.8%	21.2%	100.0%	50.0%	0.0%	50.0%
MY	5.3%	11.1%	94.7%	88.9%	79.7%	62.3%	20.3%	37.7%	52.9%	51.5%	47.1%	48.5%
MM	21.1%	57.1%	78.9%	42.9%	91.4%	93.5%	8.6%	6.5%	67.6%	21.7%	32.4%	78.3%
PH	13.3%	12.1%	86.7%	87.9%	95.0%	88.5%	5.0%	11.5%	26.9%	24.0%	73.1%	76.0%
SG	0.0%	0.0%	100.0%	100.0%	87.1%	90.7%	12.9%	9.3%	15.2%	21.2%	84.8%	78.8%
TH	38.5%	22.2%	61.5%	77.8%	92.2%	76.9%	7.8%	23.1%	55.3%	46.9%	44.7%	53.1%
VN	14.8%	13.3%	85.2%	86.7%	97.7%	80.3%	2.3%	19.7%	8.3%	17.0%	91.7%	83.0%

LEADERSHIP IN CHAMPIONING GLOBAL FREE TRADE

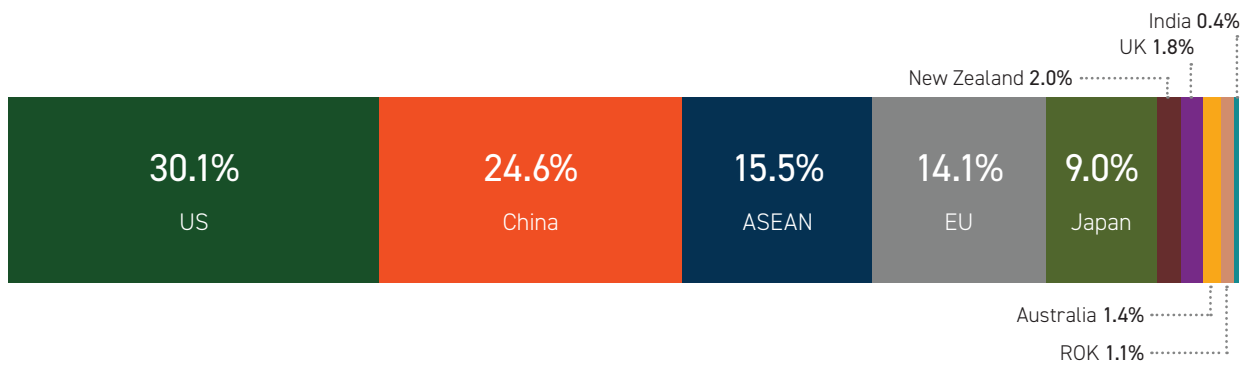
The world economy had a rough and bumpy ride in the last year with supply chain disruptions and an unprecedented energy crisis in late 2021. In all of this, the region's confidence in the United States' leadership in global free trade expanded from 19.7% last year to 30.1% putting it ahead of the European Union (14.1%) who was the front-runner in 2021. China came in second place with 24.6% of the votes, up from 13.2% last year. ASEAN was ranked third at 15.5% dropping from 21.5% last year. The EU returned in the 4th place at 14.1% followed by Japan at 9.0%.

Myanmar (51.1%), Singapore (43.7%), Vietnam (40.3%), Malaysia (37.8%), the Philippines (34.3%), and Thailand (28.2%) placed the US as their top choice. Cambodia is the strongest supporter of China's leadership at 71.6% (highest of the three countries that chose China), followed by Laos at 61.4% and Indonesia

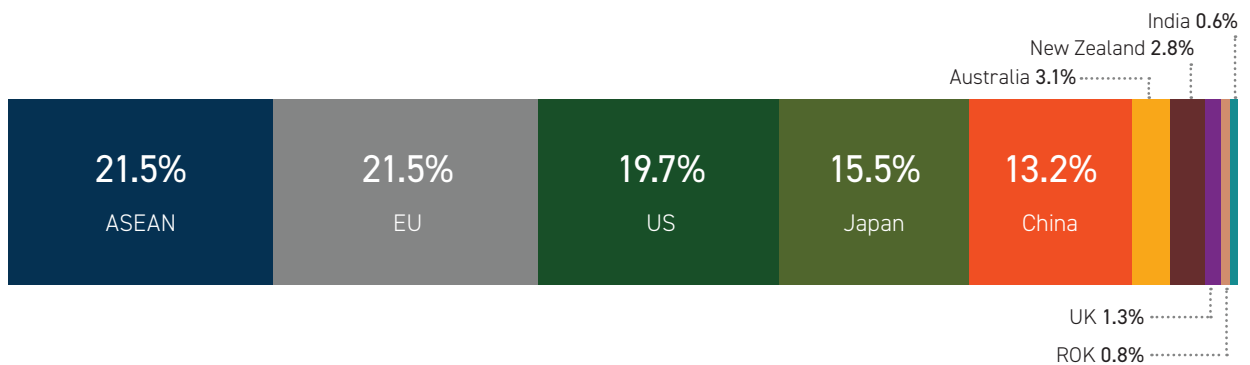
at 25.2%. The China-Cambodia Free Trade Agreement took effect on 1 January 2022. There are also indications of a possible review of the ASEAN-China Free Trade Agreement sometime this year. This may have contributed to the perception of Chinese leadership in free trade. Meanwhile, Brunei (39.6%) and Indonesia (25.2% tie with China) are most confident of ASEAN's role in championing free trade.

The US' increase from 19.7% to 30.1% is fairly surprising. In truth, there hasn't been much concrete actions taken by the US to champion free trade since the Biden Administration took over in January 2021. In fact, to the casual observer, there appears to be a continuation of Trump's 'America First' policy in terms of trade for this major power.

2022



2021



10% weighting was applied to 2021 data resulting in a change of results and rankings.

Q18 Who do you have the strongest confidence in to provide leadership in championing the global free trade agenda?

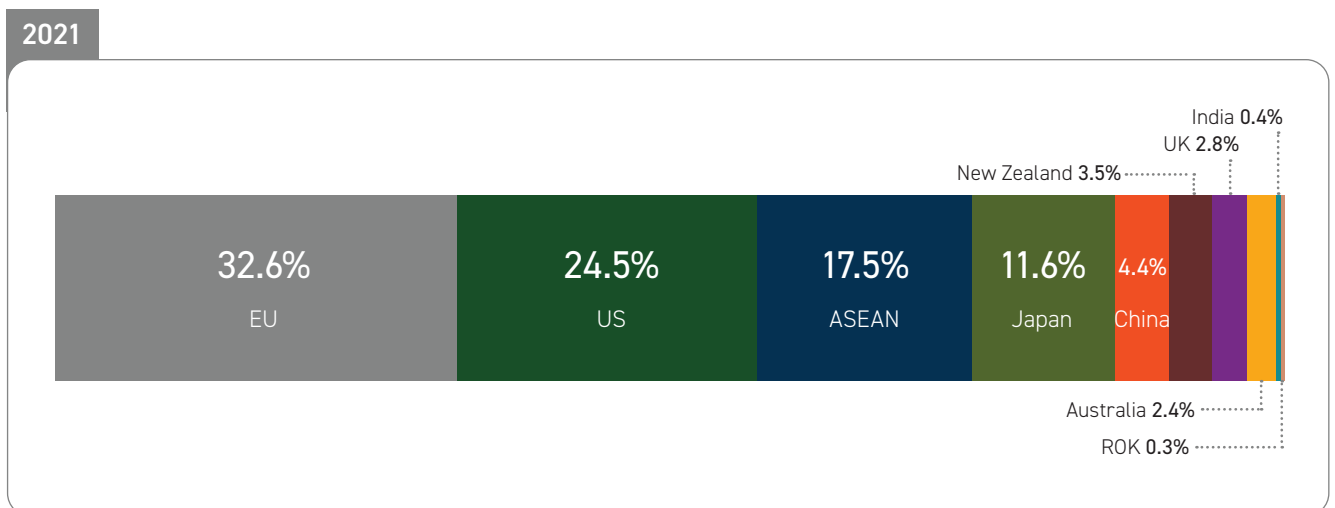
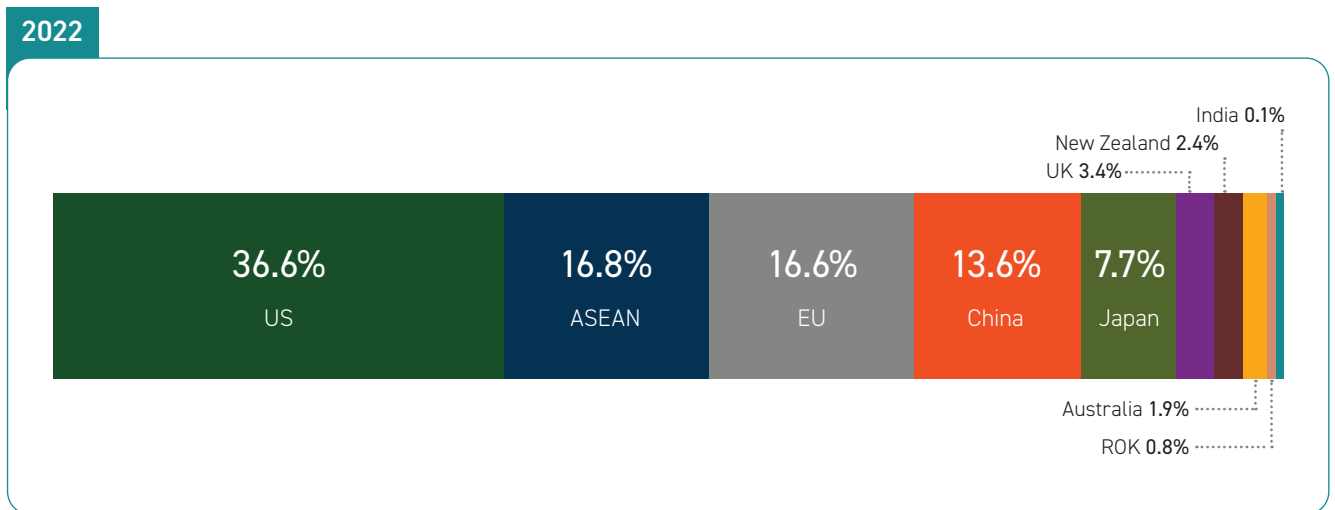
2022										
Country	ASEAN	Australia	China	The European Union	India	Japan	New Zealand	Republic of Korea	The United Kingdom	The United States
ASEAN	15.5%	1.4%	24.6%	14.1%	0.4%	9.0%	2.0%	1.1%	1.8%	30.1%
Brunei	39.6%	3.8%	11.3%	7.5%	0.0%	17.0%	7.5%	0.0%	1.9%	11.3%
Cambodia	2.5%	0.0%	71.6%	6.2%	0.0%	3.7%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

2021										
Country	ASEAN	Australia	China	The European Union	India	Japan	New Zealand	Republic of Korea	The United Kingdom	The United States
ASEAN	21.5%	3.1%	13.2%	21.5%	0.6%	15.5%	2.8%	0.8%	1.3%	19.7%
Brunei	36.4%	3.0%	15.2%	3.0%	0.0%	24.2%	3.0%	3.0%	0.0%	15.2%
Cambodia	15.4%	7.7%	19.2%	26.9%	0.0%	19.2%	0.0%	0.0%	3.8%	7.7%
Indonesia	19.4%	0.0%	20.9%	29.5%	0.8%	8.5%	2.3%	2.3%	2.3%	15.5%
Laos	22.5%	5.0%	27.5%	17.5%	0.0%	7.5%	5.0%	5.0%	0.0%	15.0%
Malaysia	19.7%	3.4%	11.1%	23.1%	0.0%	13.7%	5.1%	5.1%	0.9%	21.4%
Myanmar	23.7%	0.0%	9.6%	16.7%	1.9%	28.2%	2.6%	2.6%	1.9%	14.7%
Philippines	19.4%	4.5%	1.5%	34.3%	0.0%	11.9%	1.5%	1.5%	1.5%	22.4%
Singapore	25.3%	0.6%	15.2%	18.4%	0.6%	10.1%	3.2%	3.2%	1.9%	24.7%
Thailand	17.6%	5.3%	9.2%	22.1%	2.3%	14.5%	5.3%	5.3%	0.8%	20.6%
Vietnam	15.4%	1.1%	2.9%	24.0%	0.0%	16.6%	0.0%	0.0%	0.0%	40.0%

LEADERSHIP IN MAINTAINING RULES-BASED ORDER AND UPHOLDING INTERNATIONAL LAW

The top three choices of global leadership are the United States (36.6%), ASEAN (16.8%) and the European Union (16.6%) in a surprising change from last year's ranking order of the EU, US and ASEAN. The difference between ASEAN and the EU is a mere 0.2 percentage point. The US' share grew from 24.5% last year to 36.6% whereas the EU's share shrank from 32.6% to 16.6%. Another surprising finding is the view of China taking leadership in maintaining rules-based order growing from 4.4% in 2021 to 13.6% in 2022.

At the country-level, Malaysia, Myanmar, the Philippines, Singapore, Thailand and Vietnam chose the US as their top choice whereas Brunei, Indonesia and Laos chose ASEAN. China was Cambodia's clear top choice at an overwhelming 65.4%. On the other hand, Indonesia, Malaysia, Myanmar, Singapore, and Thailand expressed confidence in the EU as the second most likely to provide leadership in maintaining the rules-based order and upholding international law. Laos' trust in Japan as a leader increased by 7.3% this year.



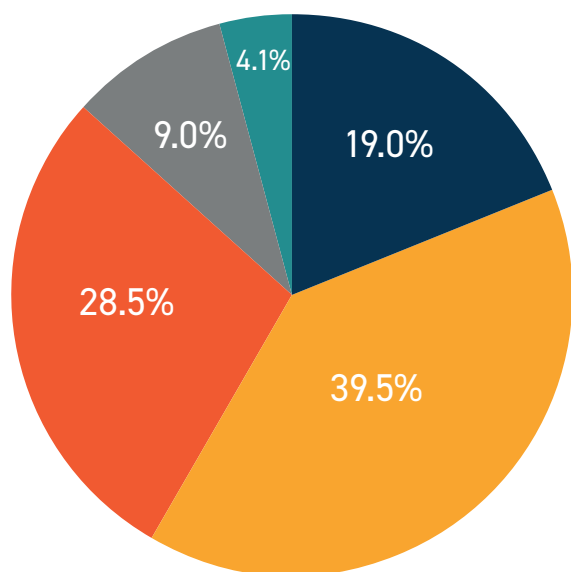
10% weighting was applied to 2021 data resulting in a change of results and rankings.

Q19 Who do you have the strongest confidence in to provide leadership to maintain the rules-based order and uphold international law?

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

2021										
Country	ASEAN	Australia	China	The European Union	India	Japan	New Zealand	Republic of Korea	The United Kingdom	The United States
ASEAN	17.5%	2.4%	4.4%	32.6%	0.4%	11.6%	3.5%	0.3%	2.8%	24.5%
Brunei	18.2%	6.1%	3.0%	24.2%	0.0%	12.1%	9.1%	0.0%	12.1%	15.2%
Cambodia	15.4%	0.0%	7.7%	34.6%	0.0%	19.2%	3.8%	0.0%	0.0%	19.2%
Indonesia	24.0%	2.3%	4.7%	34.9%	0.0%	5.4%	2.3%	0.8%	2.3%	23.3%
Laos	25.0%	0.0%	12.5%	27.5%	0.0%	20.0%	5.0%	0.0%	2.5%	7.5%
Malaysia	14.5%	0.9%	4.3%	40.2%	0.9%	8.5%	6.8%	0.9%	2.6%	20.5%
Myanmar	23.1%	0.6%	2.6%	25.0%	0.6%	25.0%	1.3%	0.6%	3.2%	17.9%
Philippines	19.4%	6.0%	0.0%	38.8%	0.0%	4.5%	0.0%	0.0%	1.5%	29.9%
Singapore	12.7%	4.4%	2.5%	31.6%	0.6%	7.6%	3.2%	0.0%	0.6%	36.7%
Thailand	7.6%	3.1%	4.6%	48.1%	0.8%	9.2%	3.1%	0.8%	1.5%	21.4%
Vietnam	15.4%	1.1%	2.3%	20.6%	1.1%	4.6%	0.0%	0.0%	1.1%	53.7%

VIEWS ON THE QUADRILATERAL SECURITY DIALOGUE (QUAD)



With greater emphasis being placed on the Quadrilateral Security Dialogue (QUAD) between Australia, India, Japan and the United States in 2021, 58.5% of the respondents agree or strongly agree that the strengthening of the QUAD, including through practical cooperation, will be constructive for the region. This view is supported by respondents from the Philippines (81.6%), Laos (75.0%), Vietnam (65.9%), Indonesia (64.9%), Singapore (63.5%), and Myanmar (61.4%).

Only 13.1% of the respondents disagree or strongly disagree, among whom, Cambodia respondents (40.7%) are the most apprehensive as compared to just 2.3% of Laos respondents.

■ Strongly agree
 ■ Agree
 ■ Neutral
■ Disagree
 ■ Strongly disagree

Q20 The strengthening of the Quad and the prospects of tangible cooperation in areas like vaccine security and climate change is positive and reassuring for Southeast Asia.

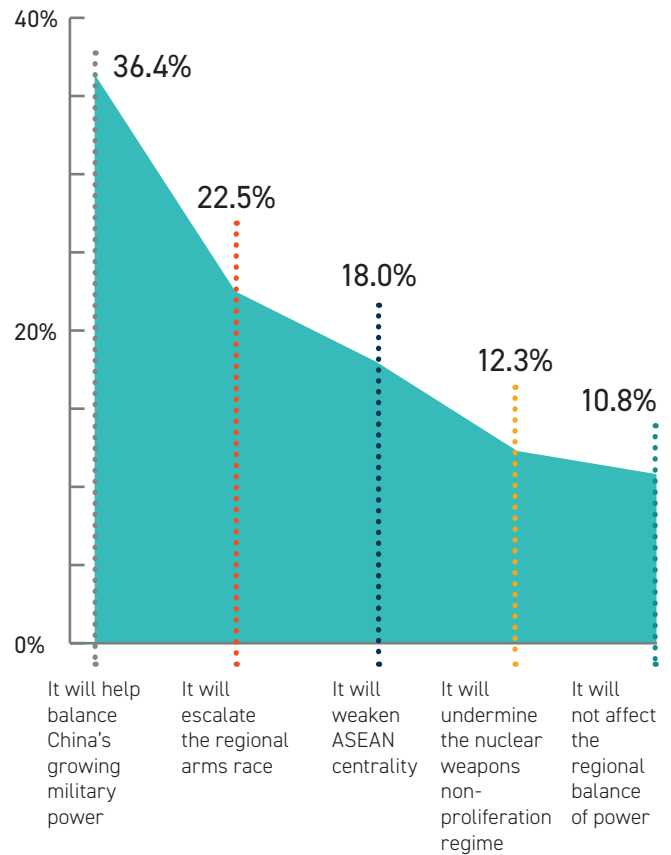
Country	Strongly agree	Agree	Neutral	Disagree	Strongly disagree
ASEAN	19.0%	39.5%	28.5%	9.0%	4.1%
Brunei	15.1%	37.7%	35.8%	9.4%	1.9%
Cambodia	9.9%	18.5%	30.9%	25.9%	14.8%
Indonesia	14.5%	50.4%	23.7%	8.4%	3.1%
Laos	25.0%	50.0%	22.7%	2.3%	0.0%
Malaysia	15.6%	28.9%	34.1%	11.1%	10.4%
Myanmar	20.3%	41.1%	32.9%	5.1%	0.6%
Philippines	31.3%	50.3%	14.8%	3.5%	0.3%
Singapore	22.5%	41.0%	24.8%	9.9%	1.8%
Thailand	15.4%	30.8%	40.2%	8.5%	5.1%
Vietnam	20.1%	45.8%	25.0%	5.6%	3.5%

VIEWS ON THE AUSTRALIA-UK-US TRILATERAL SECURITY ARRANGEMENT (AUKUS)

A trilateral security arrangement between Australia, the United Kingdom and the United States (AUKUS) was announced in September 2021. Under the arrangement, the US and UK will assist Australia to acquire nuclear-powered submarines.

The new development has sparked a spectrum of responses from Southeast Asian countries. The largest group of respondents (36.4%) feel that AUKUS will help balance China's growing military power, while a third of the respondents feel that it will primarily escalate regional arms race (22.5%) or undermine the nuclear weapons non-proliferation regime (12.3%). Approximately a fifth of respondents (18.0%) are of the view that the AUKUS arrangement will weaken ASEAN centrality.

Country-level data notes that respondents from Myanmar (63.7%) and the Philippines (60.0%) have a greater tendency to view AUKUS as having the potential to balance China's growing military power while only 9.1% of Laos respondents share this opinion – instead, viewing the weakening of ASEAN centrality (36.4%) as the primary ramification of this arrangement.



Q21 How will AUKUS affect regional security?

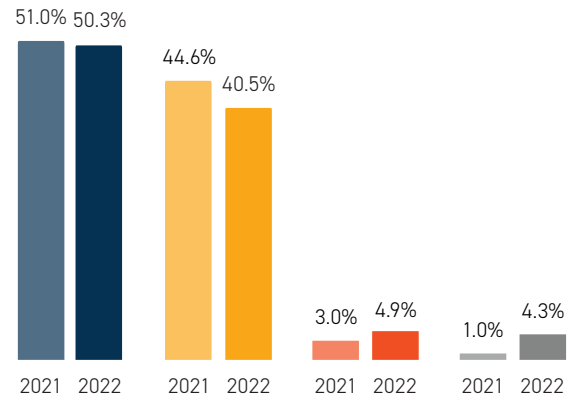
Country	It will weaken ASEAN centrality	It will undermine the nuclear weapons non-proliferation regime	It will escalate the regional arms race	It will help balance China's growing military power	It will not affect the regional balance of power
ASEAN	18.0%	12.3%	22.5%	36.4%	10.8%
Brunei	13.2%	17.0%	30.2%	20.8%	18.9%
Cambodia	17.3%	14.8%	28.4%	25.9%	13.6%
Indonesia	23.7%	16.0%	21.4%	26.7%	12.2%
Laos	36.4%	18.2%	22.7%	9.1%	13.6%
Malaysia	20.0%	9.6%	32.6%	28.9%	8.9%
Myanmar	12.6%	2.6%	8.6%	63.7%	12.6%
Philippines	11.8%	6.5%	15.5%	60.0%	6.3%
Singapore	11.7%	8.6%	20.7%	50.9%	8.1%
Thailand	14.5%	17.9%	27.4%	31.6%	8.5%
Vietnam	18.8%	11.8%	18.1%	46.5%	4.9%

VIEWS ON CLIMATE CHANGE

50.3% of Southeast Asians see climate change as a “serious and immediate threat to the well-being of their country”, although it decreased slightly from 51.0% last year. This view is more pronounced in countries such as the Philippines (73.8%), Laos (56.8%), and Vietnam (55.6%). The Philippines and Vietnam were the two countries most affected by a series of extreme weather events in 2021, including super typhoon *Rai* most recently.

The number of climate deniers who share the view that “there is no scientific basis for climate change” and “It is a long-term challenge and will not impact me in my lifetime” has increased significantly from 4.0% last year to 9.2% this year. The view is more pronounced in Cambodia (17.2%), Vietnam (15.2%), Thailand (12.0%), Indonesia (11.5%), and Myanmar (10.0%).

Unsurprisingly, climate change is also a generational issue in some ASEAN countries. Respondents between 21-35 years of age in the Philippines, Indonesia, and Singapore are more likely to say that climate change is a “serious and immediate threat to the well-being of their country” than the older age groups. For instance, 85.3% of respondents between 21-35 years old in the Philippines are aligned with this view compared to only 68.0%, 70.8%, 71.4% in the age groups of 36-45, 46-60, and above 60 years old, respectively.



- 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 challenge and will not impact me in my lifetime
- There is no scientific basis for climate change

Q22 What is your view of climate change?

Country	It is a serious and immediate threat to the well-being of my country		It is an important issue that deserves to be monitored		It is a long-term challenge and will not impact me in my lifetime		There is no scientific basis for climate change	
	2021	2022	2021	2022	2021	2022	2021	2022
ASEAN	51.0%	50.3%	44.6%	40.5%	3.0%	4.9%	1.0%	4.3%
Brunei	18.2%	45.3%	78.8%	54.7%	3.0%	0.0%	0.0%	0.0%
Cambodia	50.0%	32.1%	50.0%	50.6%	0.0%	8.6%	0.0%	8.6%
Indonesia	58.9%	52.7%	37.2%	35.9%	1.6%	4.6%	1.6%	6.9%
Laos	40.0%	56.8%	50.0%	34.1%	10.0%	6.8%	0.0%	2.3%
Malaysia	47.0%	48.1%	49.6%	43.7%	0.9%	5.9%	0.9%	2.2%
Myanmar	38.5%	42.0%	57.1%	48.0%	3.2%	4.0%	0.6%	6.0%
Philippines	85.1%	73.8%	7.5%	24.5%	3.0%	1.5%	4.5%	0.3%
Singapore	52.5%	51.4%	44.9%	41.9%	1.3%	4.5%	0.6%	2.3%
Thailand	48.9%	45.3%	47.3%	42.7%	2.3%	6.0%	1.5%	6.0%
Vietnam	70.9%	55.6%	24.0%	29.2%	5.1%	6.9%	0.0%	8.3%

Note:

- One option “It is not a threat to me or my country” was removed this year.
- 10% weighting was applied to 2021 data resulting in a change of results.

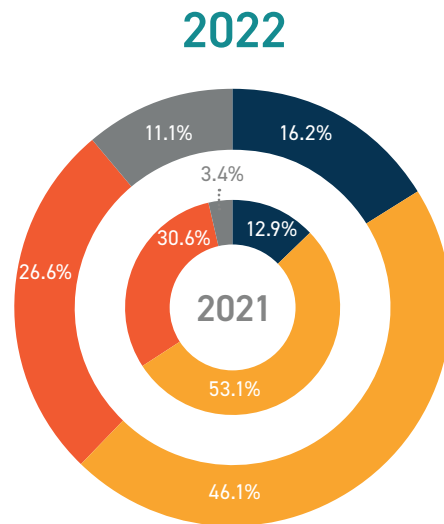
SECTION IV: US-China Rivalry and Impact on Southeast Asia

This section examines ASEAN's sentiments and options in the unfolding power competition in the region, especially the deepening rivalry between China and the United States and the potential benefits and downside risks of Chinese membership in the Comprehensive and Progressive Agreement for Trans-Pacific Partnership (CPTPP) as well as the key implications of the US staying out of the CPTPP. **Weighting was applied in this section for both 2021 and 2022 results in order to provide trend analysis.**

ASSESSING ASEAN'S "NON-CHOICE"

In the midst of major power rivalry particularly between China and the United States, ASEAN member states continue to favour the option of enhancing ASEAN's resilience and unity to fend off pressure from the two major powers (46.1%). The idea of a proactive ASEAN seems to be more popular than its traditional stance of not choosing sides between China and the US (26.6%). Another option that has slightly increased in popularity is for ASEAN to seek out "third parties" to broaden its strategic space and options (16.2%), with Vietnam's increase being the most significant.

The least popular option of ASEAN choosing sides between one of the two major powers, as remaining neutral is impractical (11.1%), has gained traction since 2021 (3.4%) – more than two-fold increase across ASEAN. Of the respondents who chose this option, Myanmar (30.6%), Cambodia (13.6%), Thailand (12.8%) and Malaysia (12.6%) are top of the list.



Q23 ASEAN is caught in the crossfire as Beijing and Washington compete for influence and leadership in Southeast Asia. How should ASEAN best respond?

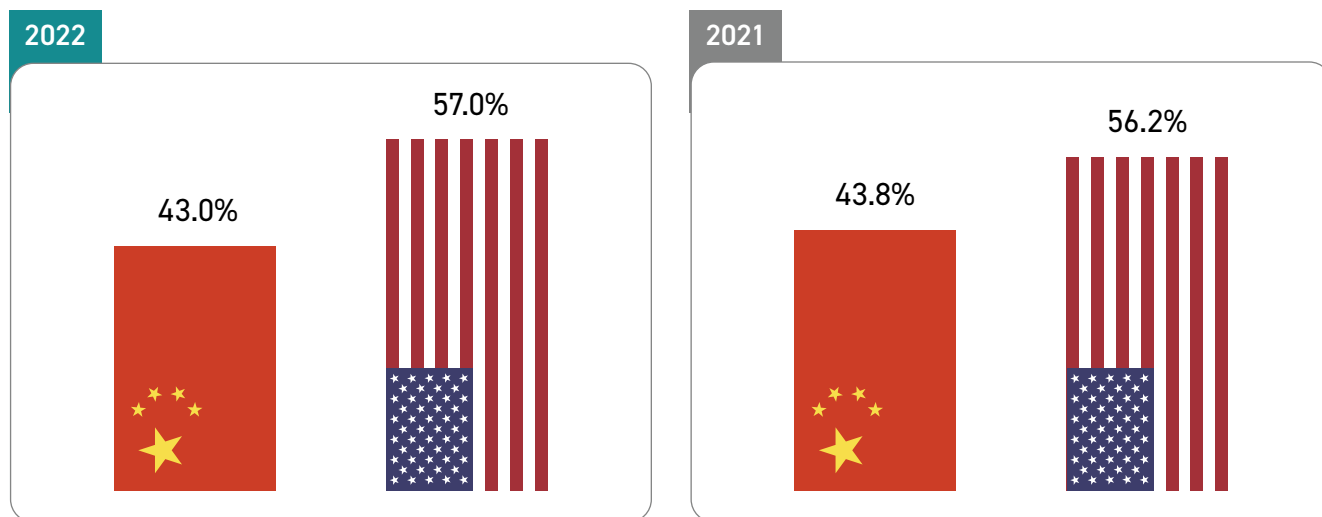
Country	ASEAN has to seek out "third parties" to broaden its strategic space and options		ASEAN should enhance its resilience and unity to fend off pressure from the two major powers		ASEAN should continue its position of not siding with China or the US		ASEAN has to choose between one of the two major powers as remaining neutral is impractical	
	2021	2022	2021	2022	2021	2022	2021	2022
ASEAN	12.9%	16.2%	53.1%	46.1%	30.6%	26.6%	3.4%	11.1%
Brunei	18.2%	17.0%	42.4%	50.9%	39.4%	28.3%	0.0%	3.8%
Cambodia	7.7%	11.1%	69.2%	44.4%	23.1%	30.9%	0.0%	13.6%
Indonesia	8.5%	18.3%	60.5%	52.7%	27.9%	22.1%	3.1%	6.9%
Laos	17.5%	13.6%	35.0%	50.0%	42.5%	27.3%	5.0%	9.1%
Malaysia	4.3%	15.6%	51.3%	35.6%	35.9%	36.3%	8.5%	12.6%
Myanmar	18.6%	16.6%	36.5%	25.1%	36.5%	27.7%	8.3%	30.6%
Philippines	17.9%	13.3%	62.7%	63.5%	17.9%	17.8%	1.5%	5.5%
Singapore	14.6%	18.0%	51.9%	38.3%	31.6%	36.9%	1.9%	6.8%
Thailand	13.7%	17.1%	49.6%	49.6%	32.1%	20.5%	4.6%	12.8%
Vietnam	8.0%	21.5%	71.4%	50.7%	19.4%	18.1%	1.1%	9.7%

10% weighting was applied to 2021 data resulting in a change of results.

ASEAN'S FUTURE: CHINA OR THE US?

The US continues to enjoy popular support with 57.0% of the respondents choosing it as compared to 43.0% who chose China. Country-level data has again revealed another shift in positions of ASEAN member states with the largest shifts in Cambodia for China (from 46.2% to 81.5%) and Myanmar for the US (from 48.1% to 92.0%). Besides Cambodia, Laos (81.8%) and Brunei (64.2%) were the two countries with the majority choosing China over the US. On the flip-side of the coin, the US enjoys the greatest support from Myanmar (92.0%), the Philippines (83.5%) and Singapore (77.9%).

While the US remains the preferred choice of Southeast Asian respondents, it has seen significantly weakened support from Cambodia and slighter degrees of decline from Indonesia, Vietnam, Laos, and the Philippines. However, the US has gained significant support from Myanmar respondents, with a significant increase from 48.1% in 2021 to 92.0% in 2022. Contrastingly, Myanmar respondents' support for China fell from 51.9% in 2021 to only 8.0% in 2022, reflecting a considerable shift in the attitude of Myanmar's respondents.



Q24 If ASEAN was forced to align itself with one of the two strategic rivals, which should it choose?

Country	China		The United States	
	2021	2022	2021	2022
ASEAN	43.8%	43.0%	56.2%	57.0%
Brunei	69.7%	64.2%	30.3%	35.8%
Cambodia	46.2%	81.5%	53.8%	18.5%
Indonesia	35.7%	44.3%	64.3%	55.7%
Laos	80.0%	81.8%	20.0%	18.2%
Malaysia	47.0%	43.0%	53.0%	57.0%
Myanmar	51.9%	8.0%	48.1%	92.0%
Philippines	13.4%	16.5%	86.6%	83.5%
Singapore	34.2%	22.1%	65.8%	77.9%
Thailand	43.5%	42.7%	56.5%	57.3%
Vietnam	16.0%	26.4%	84.0%	73.6%

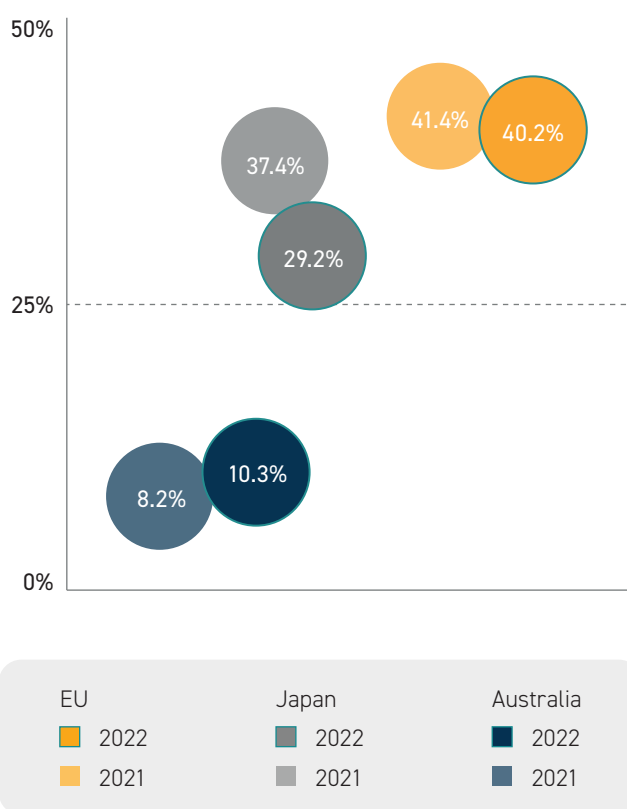
10% weighting was applied to 2021 data resulting in a change of results.

BROADENING ASEAN'S STRATEGIC OPTIONS

The European Union and Japan continue to be in the leading positions for ASEAN member states in hedging against the uncertainties of the US-China strategic rivalry. 40.2% of respondents chose the EU, followed by Japan (29.2%). Australia remains a distant third option at 10.3%, followed by the United Kingdom (8.4%), the Republic of Korea (6.8%), and India (5.1%).

The EU is the top choice for Malaysia (49.6%), Cambodia (48.1%), Myanmar (46.0%), Thailand (41.9%), Indonesia (40.5%), Singapore (39.2%), Brunei (30.2%) and Vietnam (35.4%), while Japan is the top choice for Laos (47.7%). The Philippines favours both the EU and Japan equally.

Compared to 2021 findings, the number of respondents choosing Japan and India have reduced, while the number of respondents choosing Australia, the UK and the ROK have increased. The biggest increase is the UK – a new Dialogue Partner of ASEAN - with a 2.5 times increase, bringing it from the sixth position in 2021 to fourth position in 2022, due to a significant percentage of votes from Brunei (18.9%) and Cambodia (13.6%). Australia has seen an increase from 2021.



Q25 If ASEAN were to seek out “third parties” to hedge against the uncertainties of the US-China strategic rivalry, who is your most preferred and trusted strategic partner for ASEAN?

Country	Australia		The European Union		India		Japan		Republic of Korea		The United Kingdom	
	2021	2022	2021	2022	2021	2022	2021	2022	2021	2022	2021	2022
ASEAN	8.2%	10.3%	41.4%	40.2%	6.7%	5.1%	37.4%	29.2%	3.5%	6.8%	2.9%	8.4%
Brunei	18.2%	20.8%	30.3%	30.2%	6.1%	0.0%	30.3%	20.8%	3.0%	9.4%	12.1%	18.9%
Cambodia	3.8%	6.2%	42.3%	48.1%	15.4%	9.9%	38.5%	13.6%	0.0%	8.6%	0.0%	13.6%
Indonesia	7.8%	10.7%	55.8%	40.5%	3.1%	3.8%	23.3%	31.3%	7.8%	6.9%	2.3%	6.9%
Laos	5.0%	4.5%	50.0%	36.4%	2.5%	2.3%	35.0%	47.7%	7.5%	6.8%	0.0%	2.3%
Malaysia	7.7%	5.9%	43.6%	49.6%	6.8%	6.7%	30.8%	23.0%	5.1%	6.7%	6.0%	8.1%
Myanmar	7.7%	6.3%	15.4%	46.0%	10.3%	1.7%	62.8%	26.6%	0.6%	11.4%	3.2%	8.0%
Philippines	13.4%	19.0%	43.3%	34.5%	3.0%	3.0%	35.8%	34.5%	4.5%	1.8%	0.0%	7.2%
Singapore	6.3%	9.9%	44.9%	39.2%	5.1%	5.0%	38.0%	35.1%	3.8%	5.9%	1.9%	5.0%
Thailand	6.1%	8.5%	47.3%	41.9%	8.4%	7.7%	35.1%	25.6%	2.3%	6.8%	0.8%	9.4%
Vietnam	5.7%	11.1%	40.6%	35.4%	6.9%	11.1%	44.6%	33.3%	0.0%	4.2%	2.3%	4.9%

10% weighting was applied to 2021 data resulting in a change of results.

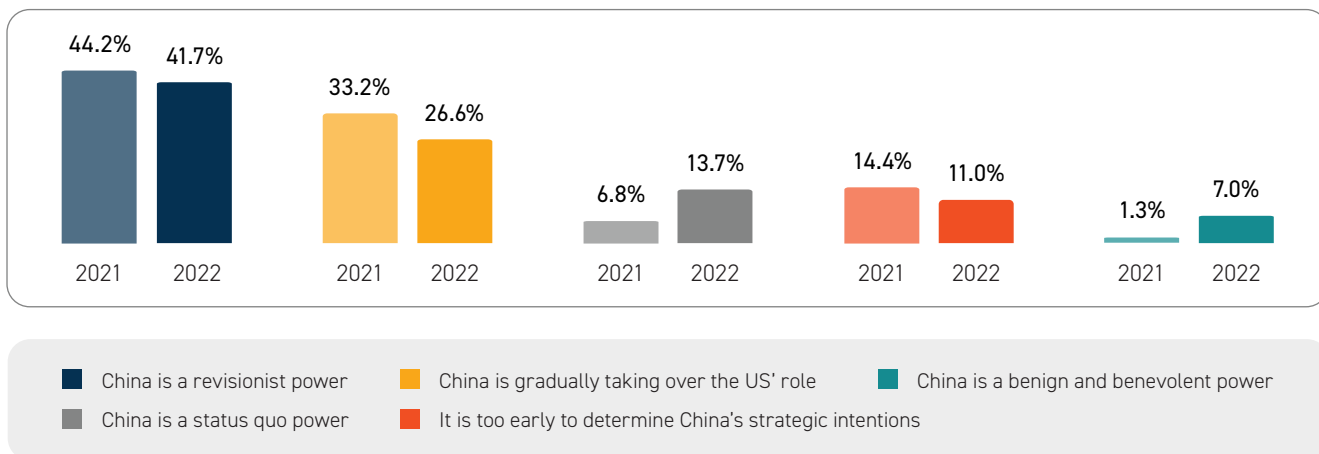
IMPACT OF CHINA'S RE-EMERGENCE AS A MAJOR POWER

The largest group of the respondents (41.7%) continues to view China as a "revisionist power" that "intends to turn Southeast Asia into its sphere of influence". This is the top response for eight ASEAN member states, the exceptions being Cambodia and Thailand. The concern that China is revisionist is most pronounced in the Philippines (62.0%) and Myanmar (56.0%).

26.6% of the respondents feel that China is gradually taking over the United States' role as the regional leader, a top response for

Thailand (35.9%) this year. However, there is a slight decline for the two top options in 2022 compared to 2021.

The options of "China is a benign and benevolent power" and "China is a status quo power and will continue to support the existing regional order", has increased by 4.5 times and doubled respectively. Both options are equally favoured by Cambodia at 25.9%.



Q26 Which statement below most accurately reflects your view of China's re-emergence as a major power with respect to Southeast Asia?

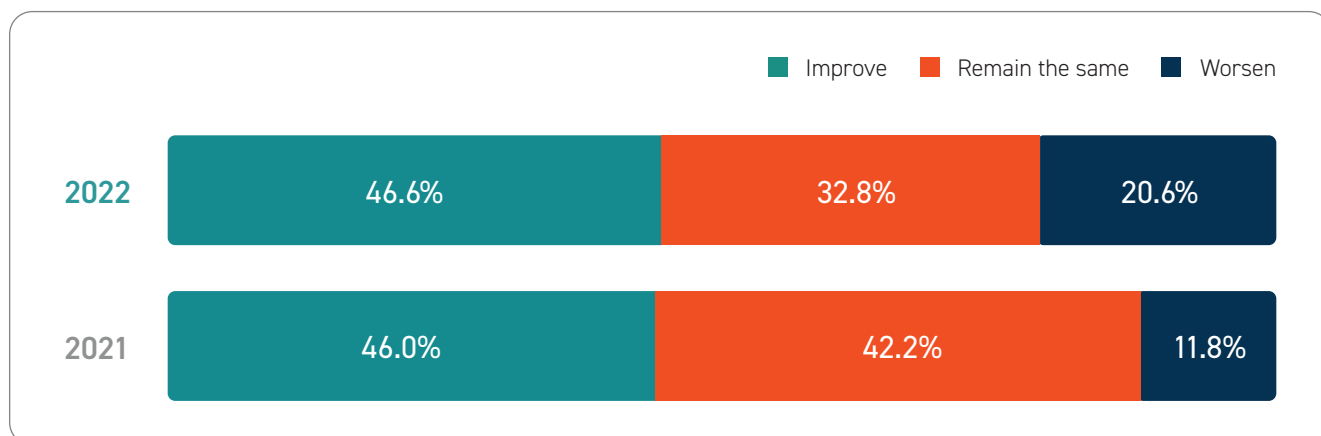
Country	China is a revisionist power and intends to turn Southeast Asia into its sphere of influence		China is gradually taking over the US' role as the regional leader		It is too early to determine China's strategic intentions		China is a status quo power and will continue to support the existing regional order		China is a benign and benevolent power	
	2021	2022	2021	2022	2021	2022	2021	2022	2021	2022
ASEAN	44.2%	41.7%	33.2%	26.6%	14.4%	11.0%	6.8%	13.7%	1.3%	7.0%
Brunei	36.4%	41.5%	42.4%	32.1%	12.1%	11.3%	9.1%	15.1%	0.0%	0.0%
Cambodia	26.9%	16.0%	46.2%	17.3%	11.5%	14.8%	11.5%	25.9%	3.8%	25.9%
Indonesia	41.9%	34.4%	31.0%	28.2%	20.9%	13.7%	6.2%	16.0%	0.0%	7.6%
Laos	45.0%	38.6%	32.5%	29.5%	12.5%	6.8%	10.0%	20.5%	0.0%	4.5%
Malaysia	45.3%	35.6%	28.2%	30.4%	15.4%	13.3%	9.4%	15.6%	1.7%	5.2%
Myanmar	28.2%	56.0%	39.1%	23.7%	22.4%	12.9%	5.8%	2.6%	4.5%	4.9%
Philippines	59.7%	62.0%	22.4%	25.5%	14.9%	6.3%	3.0%	4.8%	0.0%	1.5%
Singapore	48.1%	52.3%	36.1%	26.1%	11.4%	10.8%	3.2%	6.3%	1.3%	4.5%
Thailand	45.8%	30.8%	35.1%	35.9%	9.2%	8.5%	9.2%	15.4%	0.8%	9.4%
Vietnam	65.1%	50.0%	19.4%	17.4%	13.7%	11.1%	0.6%	14.6%	1.1%	6.9%

10% weighting was applied to 2021 data resulting in a change of results.

THE FUTURE OF CHINA'S RELATIONS WITH REGIONAL COUNTRIES

ASEAN and China celebrated the 30th anniversary of its dialogue relations and announced the establishment of an ASEAN-China Comprehensive Strategic Partnership in 2021. China has also been proactive in its engagement with ASEAN member states. The largest group of the respondents (46.6%) expect their bilateral relations to improve, while 32.8% expect the status quo to remain. On the other hand, the number of respondents who chose "worsen" (12.4%) and "worsen significantly" (8.2%) have increased from 2021.

At the country-level, majority of the respondents from Brunei (73.6%), Cambodia (84.0%), Indonesia (53.4%), Laos (84.1%) and Thailand (46.2%) feel that their country's relations with China will improve or improve significantly, while Myanmar (66.0%) and the Philippines (40.8%) respondents are of the view that relations will worsen or worsen significantly. Respondents from Malaysia (43.7%), Singapore (61.7%), and Vietnam (54.9%) feel that their bilateral relations with China will remain the same.



Q27 How do you see your country's relations with China evolving in the next three years?

Country	Worsen significantly		Worsen		Remain the same		Improve		Improve significantly	
	2021	2022	2021	2022	2021	2022	2021	2022	2021	2022
ASEAN	2.4%	8.2%	9.4%	12.4%	42.2%	32.8%	30.5%	31.0%	15.5%	15.6%
Brunei	0.0%	0.0%	6.1%	5.7%	36.4%	20.8%	42.4%	52.8%	15.2%	20.8%
Cambodia	0.0%	6.2%	3.8%	0.0%	15.4%	9.9%	34.6%	42.0%	46.2%	42.0%
Indonesia	3.1%	3.1%	4.7%	11.5%	34.1%	32.1%	39.5%	39.7%	18.6%	13.7%
Laos	5.0%	2.3%	2.5%	2.3%	30.0%	11.4%	32.5%	38.6%	30.0%	45.5%
Malaysia	0.9%	6.7%	6.0%	11.9%	53.8%	43.7%	29.1%	29.6%	10.3%	8.1%
Myanmar	0.6%	40.6%	10.3%	25.4%	50.6%	23.7%	33.3%	7.7%	5.1%	2.6%
Philippines	9.0%	10.0%	20.9%	30.8%	49.3%	31.5%	16.4%	24.3%	4.5%	3.5%
Singapore	0.6%	4.1%	11.4%	12.2%	51.9%	61.7%	29.7%	19.8%	6.3%	2.3%
Thailand	1.5%	5.1%	6.1%	9.4%	42.0%	39.3%	32.8%	34.2%	17.6%	12.0%
Vietnam	3.4%	4.2%	22.3%	14.6%	58.9%	54.9%	14.3%	20.8%	1.1%	5.6%

10% weighting was applied to 2021 data resulting in a change of results.

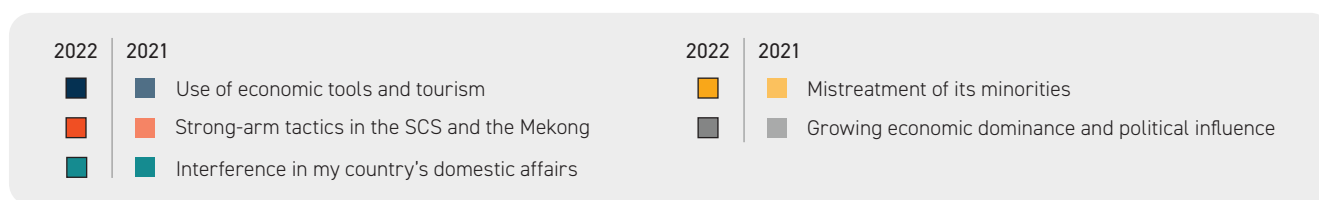
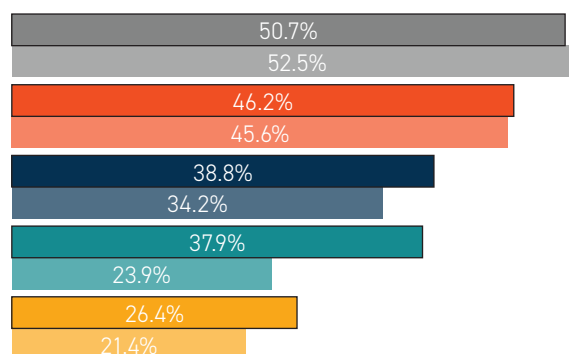
THE FUTURE OF CHINA'S RELATIONS WITH REGIONAL COUNTRIES

Similar to 2021 findings, more than half of the respondents (50.7%) are of the view that "China's growing economic dominance and political influence in my country" can potentially worsen their positive impression of China. This view is the top choice for respondents from Cambodia (50.0%), Indonesia (50.0%), Laos (75.7%), Myanmar (69.4%), and Thailand (53.7%).

A close second top concern (46.2%) is "China's strong-arm tactics in the South China Sea and Mekong", which is the top concern for all the claimant states in the South China Sea, namely Brunei (56.4%), Malaysia (56.9%), the Philippines (71.2%) and Vietnam (55.3%).

The third concern (38.8%) is "China's use of economic tools and tourism to punish my country's foreign policy choices" which is the top choice for Singapore and Cambodia.

Slightly behind as the fourth overall concern is "China's interference in my country's domestic affairs (including influence over the ethnic Chinese citizens of my country)" at 37.9% mainly driven by higher percentage of respondents from Myanmar (61.1%), Cambodia (48.5%), Malaysia (43.1%) and Singapore (40.8%).



Q28 What could potentially worsen your positive impression of China?

(check 2 responses)

Answered: 553 (Respondents who chose the "Improve" and "Improve significantly" options in Q27)

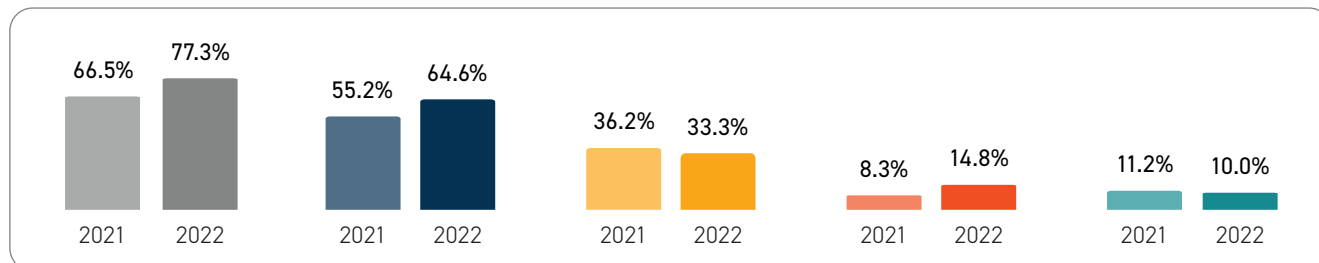
Country	China's use of economic tools and tourism to punish my country's foreign policy choices		China's mistreatment of its minorities in Tibet and Xinjiang and its handling of Hong Kong		China's strong-arm tactics in the South China Sea and the Mekong		China's growing economic dominance and political influence in my country		China's interference in my country's domestic affairs (including influence over the ethnic Chinese citizens of my country)	
	2021	2022	2021	2022	2021	2022	2021	2022	2021	2022
ASEAN	34.2%	38.8%	21.4%	26.4%	45.6%	46.2%	52.5%	50.7%	23.9%	37.9%
Brunei	10.5%	23.1%	47.4%	46.2%	52.6%	56.4%	57.9%	51.3%	15.8%	23.1%
Cambodia	33.3%	50.0%	14.3%	17.6%	28.6%	33.8%	66.7%	50.0%	33.3%	48.5%
Indonesia	26.7%	28.6%	42.7%	41.4%	36.0%	48.6%	57.3%	50.0%	18.7%	31.4%
Laos	44.0%	43.2%	8.0%	18.9%	28.0%	24.3%	72.0%	75.7%	28.0%	37.8%
Malaysia	34.8%	49.0%	30.4%	17.6%	65.2%	56.9%	39.1%	33.3%	10.9%	43.1%
Myanmar	21.7%	33.3%	3.3%	19.4%	31.7%	16.7%	73.3%	69.4%	46.7%	61.1%
Philippines	42.9%	27.9%	0.0%	18.0%	35.7%	71.2%	50.0%	55.0%	28.6%	27.9%
Singapore	54.4%	63.3%	22.8%	26.5%	52.6%	51.0%	12.3%	18.4%	38.6%	40.8%
Thailand	33.3%	40.7%	30.3%	24.1%	51.5%	48.1%	59.1%	53.7%	7.6%	33.3%
Vietnam	40.7%	28.9%	14.8%	34.2%	74.1%	55.3%	37.0%	50.0%	11.1%	31.6%

10% weighting was applied to 2021 data resulting in a change of results and rankings.

THE FUTURE OF CHINA'S RELATIONS WITH REGIONAL COUNTRIES

77.3% of respondents view that "China should respect my country's sovereignty and not constrain my country's foreign policy choices". This is the top choice for Brunei (100.0%), Cambodia (80.0% - on par with the second top option), Laos (100.0%), Malaysia (72.0%), Myanmar (74.0%), Singapore (80.6%), and Thailand (70.6%).

A close second sentiment for respondents (64.6%) is that "China should resolve all territorial and maritime disputes peacefully in accordance with international law". This is an increase from 2021 (55.2%) and is the top choice for respondents from Cambodia (80.0% - on par with the top option), Indonesia (63.2%), the Philippines (94.5%), and Vietnam (88.9%).



- Respect my country's sovereignty
- Resolve all territorial and maritime disputes
- Make bilateral trade truly mutually beneficial
- Deepen mutual understanding
- The fault lines between my country and China cannot be bridged

Q29 What can China do to improve relations with your country?

(check 2 responses)

Answered: 528 (Respondents who chose the "Worsen" and "Worsen significantly" options in Q27)

Country	China should resolve all territorial and maritime disputes peacefully in accordance with international law		China should make bilateral trade truly mutually beneficial by addressing trade imbalances		Deepen mutual understanding by enhancing people-to-people relations		China should respect my country's sovereignty and not constrain my country's foreign policy choices		The fault lines between my country and China cannot be bridged	
	2021	2022	2021	2022	2021	2022	2021	2022	2021	2022
ASEAN	55.2%	64.6%	36.2%	33.3%	8.3%	14.8%	66.5%	77.3%	11.2%	10.0%
Brunei	100.0%	66.7%	50.0%	33.3%	0.0%	0.0%	50.0%	100.0%	0.0%	0.0%
Cambodia	0.0%	80.0%	100.0%	20.0%	0.0%	20.0%	100.0%	80.0%	0.0%	0.0%
Indonesia	60.0%	63.2%	50.0%	52.6%	20.0%	15.8%	30.0%	57.9%	10.0%	10.5%
Laos	33.3%	50.0%	33.3%	50.0%	0.0%	0.0%	33.3%	100.0%	33.3%	0.0%
Malaysia	62.5%	52.0%	0.0%	36.0%	0.0%	28.0%	87.5%	72.0%	37.5%	12.0%
Myanmar	29.4%	42.9%	29.4%	29.0%	17.6%	26.8%	76.5%	74.0%	11.8%	27.3%
Philippines	90.0%	94.5%	20.0%	19.6%	0.0%	4.9%	80.0%	79.1%	0.0%	1.8%
Singapore	52.6%	72.2%	21.1%	13.9%	21.1%	25.0%	68.4%	80.6%	5.3%	8.3%
Thailand	40.0%	35.3%	40.0%	52.9%	20.0%	23.5%	70.0%	70.6%	10.0%	17.6%
Vietnam	84.4%	88.9%	17.8%	25.9%	4.4%	3.7%	68.9%	59.3%	4.4%	22.2%

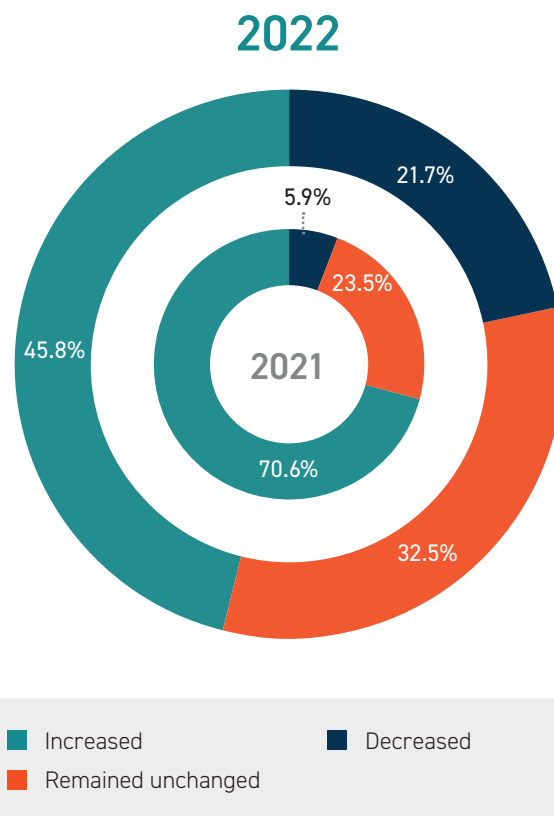
10% weighting was applied to 2021 data resulting in a change of results and rankings.

ASSESSING US ENGAGEMENT IN THE REGION

45.8% of respondents perceive that the level of United States engagement with Southeast Asia under the Biden Administration has increased or increased significantly. Although this is the prevailing option, there is a decrease from the expectation in 2021. The optimism is expressed by respondents from Brunei (52.9%), Laos (43.2%), Myanmar (56.5%), Singapore (60.8%), Thailand (53.8%), and Vietnam (52.8%).

There is also a significant percentage of respondents (32.5%) who view that the level of US engagement with Southeast Asia has remained unchanged, an increase from 2021. This option is the top choice for respondents from Indonesia (40.5%), Malaysia (40.7%), and the Philippines (37.0%).

On the other hand, respondents from Cambodia predominantly feel that the level of US engagement with Southeast Asia has decreased or decreased significantly at 38.3% (an increase from 0.0% in 2021).



Q30 The level of US engagement with Southeast Asia under the Biden Administration has...

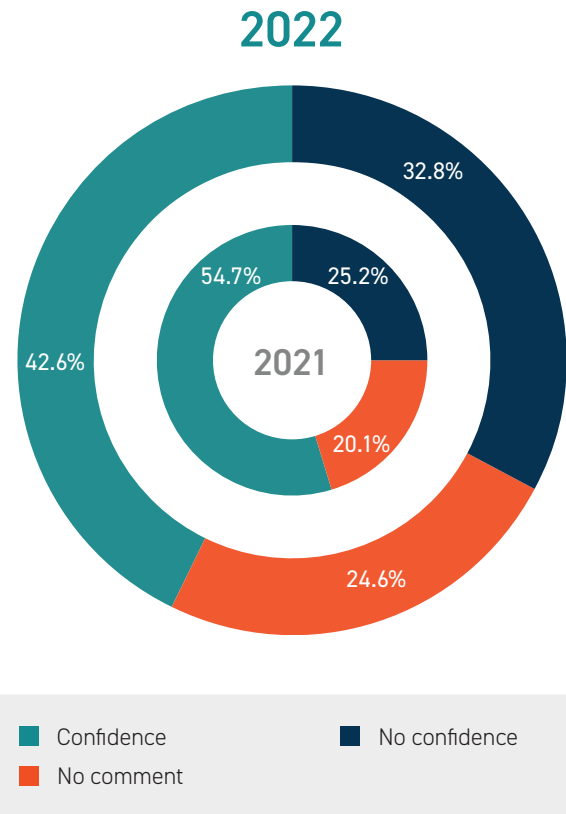
Country	Decreased significantly		Decreased		Remained unchanged		Increased		Increased significantly	
	2021	2022	2021	2022	2021	2022	2021	2022	2021	2022
ASEAN	1.0%	5.6%	4.9%	16.1%	23.5%	32.5%	58.2%	38.9%	12.4%	6.9%
Brunei	0.0%	1.9%	6.1%	11.3%	6.1%	34.0%	69.7%	47.2%	18.2%	5.7%
Cambodia	0.0%	14.8%	0.0%	23.5%	23.1%	34.6%	65.4%	23.5%	11.5%	3.7%
Indonesia	0.0%	4.6%	3.1%	17.6%	26.4%	40.5%	55.8%	32.8%	14.7%	4.6%
Laos	5.0%	6.8%	5.0%	15.9%	27.5%	34.1%	52.5%	43.2%	10.0%	0.0%
Malaysia	0.9%	6.7%	5.1%	13.3%	22.2%	40.7%	63.2%	31.9%	8.5%	7.4%
Myanmar	0.0%	3.4%	3.2%	12.0%	21.8%	28.0%	67.3%	45.4%	7.7%	11.1%
Philippines	1.5%	6.0%	1.5%	22.0%	34.3%	37.0%	41.8%	30.0%	20.9%	5.0%
Singapore	0.0%	2.7%	5.1%	9.0%	17.7%	27.5%	66.5%	47.3%	10.8%	13.5%
Thailand	0.8%	4.3%	3.8%	12.0%	16.8%	29.9%	64.1%	41.0%	14.5%	12.8%
Vietnam	2.3%	4.9%	16.6%	24.3%	38.3%	18.1%	36.0%	47.2%	6.9%	5.6%

10% weighting was applied to 2021 data resulting in a change of results.

IS THE US A RELIABLE STRATEGIC PARTNER?

The largest group of the respondents (42.6%) is confident or very confident of the United States as a strategic partner and provider of regional security. However, this is a slight decrease from 2021. Respondents from Indonesia (39.7%), Malaysia (43.7%), Myanmar (61.2%), the Philippines (57.5%), Singapore (49.1%), Thailand (46.2%), and Vietnam (57.6%) expressed confidence to various degrees.

Contrastingly, respondents from Brunei (49.1%), and Cambodia (37.1%) expressed little or no confidence, while the majority of Laos' respondents (50.0%) had no comment.



Q31 How confident are you of the US as a strategic partner and provider of regional security?

Country	No confidence		Little confidence		No comment		Confident		Very confident	
	2021	2022	2021	2022	2021	2022	2021	2022	2021	2022
ASEAN	4.7%	6.4%	20.5%	26.4%	20.1%	24.6%	48.4%	34.7%	6.3%	7.9%
Brunei	6.1%	5.7%	18.2%	43.4%	15.2%	24.5%	57.6%	24.5%	3.0%	1.9%
Cambodia	0.0%	9.9%	30.8%	27.2%	15.4%	29.6%	46.2%	23.5%	7.7%	9.9%
Indonesia	3.1%	6.1%	21.7%	30.5%	24.0%	23.7%	48.1%	35.1%	3.1%	4.6%
Laos	12.5%	11.4%	22.5%	27.3%	40.0%	50.0%	17.5%	11.4%	7.5%	0.0%
Malaysia	8.5%	9.6%	24.8%	24.4%	11.1%	22.2%	44.4%	31.1%	11.1%	12.6%
Myanmar	9.0%	4.3%	19.2%	11.1%	31.4%	23.4%	38.5%	42.3%	1.9%	18.9%
Philippines	1.5%	4.0%	14.9%	25.3%	6.0%	13.3%	67.2%	50.0%	10.4%	7.5%
Singapore	1.3%	4.5%	17.1%	28.4%	12.7%	18.0%	60.8%	41.0%	8.2%	8.1%
Thailand	3.1%	4.3%	26.0%	30.8%	13.7%	18.8%	52.7%	38.5%	4.6%	7.7%
Vietnam	1.7%	4.2%	10.3%	16.0%	32.0%	22.2%	50.9%	50.0%	5.1%	7.6%

10% weighting was applied to 2021 data resulting in a change of results.

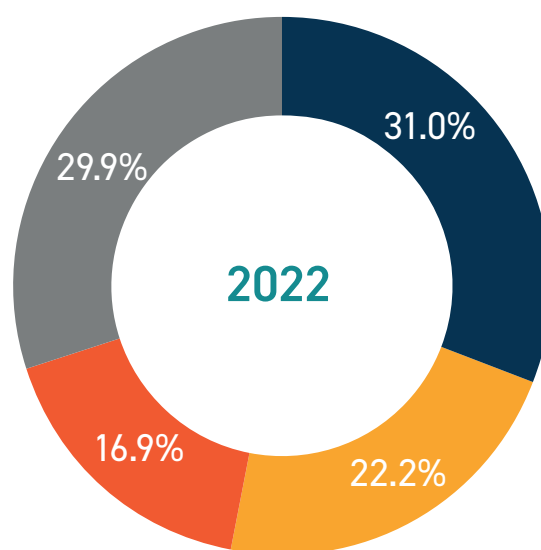
VIEWS ON CHINESE MEMBERSHIP IN THE CPTPP

Chinese membership in the Comprehensive and Progressive Trade Agreement for Trans-Pacific Partnership (CPTPP) is perceived to create both opportunities and challenges for countries in Asia and the Pacific. If China's application is successful, 53.2% of respondents perceive that Chinese membership will provide economic and political benefits to China, the US and other CPTPP members. These benefits include reducing economic tensions in the region and resolving the US-China trade war (31.0%), and offering China an opportunity to pursue difficult domestic reforms [e.g. promoting transparency in state-owned enterprises (SOEs), reducing SOE subsidies, and enhancing intellectual property protection and modernising the Chinese economy (22.2%)].

The perceived benefits of Chinese membership vary across ASEAN countries. The benefit from the reduction of economic and political tensions ranges from 15.7% of Myanmar respondents to 42.2% of Malaysia respondents. Such benefits are perceived to be moderate in Brunei (28.3%) and Singapore (33.3%). This pattern changes when ASEAN respondents perceive the benefit of China's domestic reforms. It ranges from 17.1% in Singapore to 26.5% in Thailand.

46.8% of respondents perceive that Chinese membership will increase economic and political downside risks for China, the US, and CPTPP members. These risks include raising economic tensions and the US-China trade war (29.9%), and reducing potential trade benefits for CPTPP members as well as weakening the role of CPTPP in the multilateral trading system (16.9%).

The perceived downside risks of Chinese membership also vary across ASEAN countries. The risk of escalating economic tensions ranges from 16.0% of Cambodia respondents and 18.2% in Laos to 37.7% in Brunei and 46.6% in Myanmar. Such risks are perceived to be moderate in other ASEAN-CPTPP countries such as Malaysia (26.7%), Singapore (33.8%), and Vietnam (31.9%). This pattern changes when respondents express their perception on the downside risk of weakening the CPTPP. It is low in Malaysia (8.9%), moderate in Brunei (13.2%) and Singapore (15.8%) and relatively higher in Myanmar (46.6%).



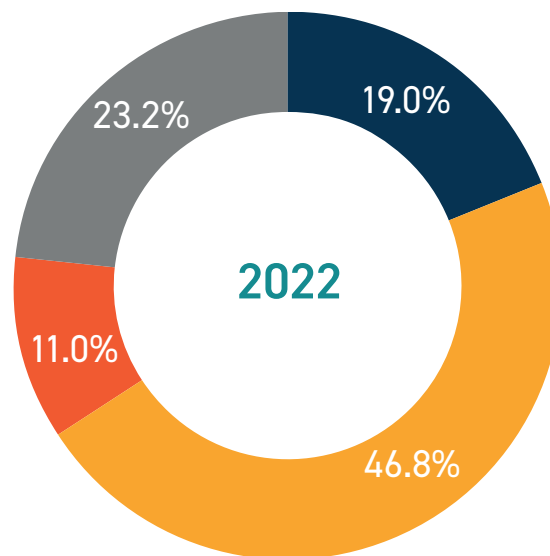
Q32 If China's application to join the CPTPP is successful, what are the main effects likely to be?

Country	By engaging China, it will reduce economic tensions in the region and help resolve the US-China trade war	It will provide China with the opportunity to pursue difficult domestic reforms and modernise its economy	It will dilute the CPTPP and reduce its impact on the multilateral trading system	It will increase economic tensions and exacerbate the US-China trade war by isolating the US
ASEAN	31.0%	22.2%	16.9%	29.9%
Brunei	28.3%	20.8%	13.2%	37.7%
Cambodia	39.5%	25.9%	18.5%	16.0%
Indonesia	35.1%	24.4%	12.2%	28.2%
Laos	36.4%	22.7%	22.7%	18.2%
Malaysia	42.2%	22.2%	8.9%	26.7%
Myanmar	15.7%	18.9%	18.9%	46.6%
Philippines	37.8%	19.5%	16.8%	26.0%
Singapore	33.3%	17.1%	15.8%	33.8%
Thailand	23.1%	26.5%	16.2%	34.2%
Vietnam	18.8%	23.6%	25.7%	31.9%

ABSENCE OF THE UNITED STATES FROM THE CPTPP

The absence of the United States from the CPTPP strengthens the impression of an ascendant China and an escalation of regional tensions. The original design intention of the CPTPP led by the US – the former Trans-Pacific Partnership (TPP) – was to counter China’s ascendance. 46.8% of respondents perceive that the rise in China’s influence in the region will fill the void left by the US. This may reflect the on-going process of China’s application to join the CPTPP to support the rules-based multilateral system at a time of the US’ withdrawal. The perceived influence of China ranges from 36.4% of respondents in Laos and 42% in Cambodia to 51.5% in the Philippines and 54.5% in Singapore.

Another 23.2% of respondents fear a rise in regional tensions as the US may shift its focus from regional trade agreements (RTAs) to security pacts in Asia and the Pacific. The perceived tensions range from 15.9% of respondents in Laos and 16.7% in Vietnam to 26.4% in Brunei and 29.8% in Indonesia. In addition, 11.0% of respondents express their concerns over the deterioration in the rules-based trading order in the region. The remaining 19.0% of respondents perceive that the CPTPP without the US has no discernible effect as the US’ position on RTAs became clear even before it officially withdrew from the TPP.



Q33 What are the main implications of the US staying out of the CPTPP?

Country	No discernible effect as the US position on mega trade deals became clear even before it officially withdrew from the Trans-Pacific Partnership	A rise in China's influence in the region, filling the void left by the US	A deterioration in the rules-based trading order in the region	A rise in regional tensions as the US shifts its focus of engagement from inclusive trade deals to exclusive security pacts
ASEAN	19.0%	46.8%	11.0%	23.2%
Brunei	15.1%	50.9%	7.5%	26.4%
Cambodia	22.2%	42.0%	11.1%	24.7%
Indonesia	14.5%	49.6%	6.1%	29.8%
Laos	38.6%	36.4%	9.1%	15.9%
Malaysia	21.5%	44.4%	8.9%	25.2%
Myanmar	12.0%	44.3%	18.3%	25.4%
Philippines	16.8%	51.5%	5.8%	26.0%
Singapore	13.5%	54.5%	10.8%	21.2%
Thailand	16.2%	44.4%	18.8%	20.5%
Vietnam	20.1%	50.0%	13.2%	16.7%

SECTION V: Perceptions of Trust

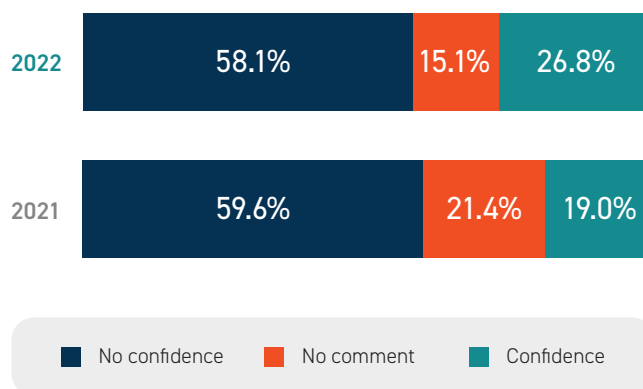
This section measures the levels of trust in the major powers to “do the right thing” in the wider interests of the global community. **Weighting was applied in this section for both 2021 and 2022 results in order to provide trend analysis.**

CHINA

The majority of respondents (58.1%) have either “little confidence” (33.3%) or “no confidence” (24.8%) in China to “do the right thing” to contribute to global peace, security, prosperity and governance. Only 26.8% are either “confident” or “very confident” that China will step up to the plate. Overall, the percentage of distrust of China has waned from 59.6% in 2021 to 58.1% this year.

Levels of distrust towards China are higher than levels of trust in all ASEAN member states, except Cambodia. The distrust levels are most palpable in Myanmar (88.8%), the Philippines (82.0%), Singapore (69.8%), Brunei (67.9%), and Vietnam (64.6%). Meanwhile, the share of distrust towards China in Cambodia is only 17.2%, significantly lower than the ASEAN average of 58.1%. Among those who distrust China, 49.6% think that China’s economic and military power could be used to threaten their country’s interest and sovereignty. This view is shared strongly in Cambodia (71.4%), the Philippines (70.7%), Vietnam (50.5%), Brunei (50.0%), and Malaysia (49.3%). Also, among this group, 23.0% think that China is not a reliable power.

Among those who trust China, 43.8% attribute this to China’s “vast economic resources and strong political will to provide global leadership”. 15.7% agree that their countries’ political views are compatible with China’s. Meanwhile, around 13.8% agree that they respect China’s civilisation and culture, military power, and ability to champion international law.



Q34 How confident are you that China will “do the right thing” to contribute to global peace, security, prosperity, and governance?

Country	No confidence		Little confidence		No comment		Confident		Very confident	
	2021	2022	2021	2022	2021	2022	2021	2022	2021	2022
ASEAN	22.0%	24.8%	37.6%	33.3%	21.4%	15.1%	17.2%	20.1%	1.8%	6.7%
Brunei	6.1%	7.5%	39.4%	60.4%	30.3%	15.1%	24.2%	17.0%	0.0%	0.0%
Cambodia	7.7%	8.6%	34.6%	8.6%	30.8%	8.6%	23.1%	44.4%	3.8%	29.6%
Indonesia	23.3%	12.2%	37.2%	38.9%	23.3%	19.8%	15.5%	21.4%	0.8%	7.6%
Laos	15.0%	4.5%	32.5%	36.4%	22.5%	34.1%	27.5%	22.7%	2.5%	2.3%
Malaysia	16.2%	20.0%	41.9%	31.1%	16.2%	11.9%	22.2%	28.9%	3.4%	8.1%
Myanmar	26.3%	77.1%	33.3%	11.7%	28.2%	9.4%	11.5%	1.7%	0.6%	0.0%
Philippines	34.3%	31.5%	47.8%	50.5%	7.5%	9.3%	7.5%	8.8%	3.0%	0.0%
Singapore	12.7%	35.6%	44.3%	34.2%	19.6%	14.0%	21.5%	14.9%	1.9%	1.4%
Thailand	26.7%	21.4%	41.2%	26.5%	16.0%	17.9%	14.5%	24.8%	1.5%	9.4%
Vietnam	51.4%	29.9%	24.0%	34.7%	20.0%	11.1%	4.6%	16.0%	0.0%	8.3%

10% weighting was applied to 2021 data resulting in a change of results.

Q35 Why do you trust China?

Answered: 320 (Respondents who chose the "Confident" and "Very confident" options in Q34)

Country	China has vast economic resources and strong political will to provide global leadership		My country's political culture and worldview are compatible with China's		China is a responsible stakeholder that respects and champions international law		China's military power is an asset for global peace and security		I respect China and admire its civilisation and culture	
	2021	2022	2021	2022	2021	2022	2021	2022	2021	2022
ASEAN	64.9%	43.8%	8.6%	15.7%	7.1%	13.6%	3.0%	13.1%	16.5%	13.8%
Brunei	100.0%	88.9%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	11.1%
Cambodia	57.1%	30.0%	28.6%	18.3%	0.0%	23.3%	14.3%	18.3%	0.0%	10.0%
Indonesia	61.9%	26.3%	4.8%	5.3%	14.3%	15.8%	4.8%	21.1%	14.3%	31.6%
Laos	83.3%	27.3%	8.3%	45.5%	8.3%	9.1%	0.0%	9.1%	0.0%	9.1%
Malaysia	63.3%	42.0%	16.7%	6.0%	3.3%	30.0%	3.3%	10.0%	13.3%	12.0%
Myanmar	73.7%	50.0%	5.3%	33.3%	0.0%	0.0%	0.0%	0.0%	21.1%	16.7%
Philippines	57.1%	62.9%	0.0%	5.7%	0.0%	5.7%	0.0%	2.9%	42.9%	22.9%
Singapore	62.2%	50.0%	8.1%	19.4%	13.5%	11.1%	2.7%	5.6%	13.5%	13.9%
Thailand	52.4%	35.0%	14.3%	12.5%	19.0%	15.0%	4.8%	30.0%	9.5%	7.5%
Vietnam	37.5%	25.7%	0.0%	11.4%	12.5%	25.7%	0.0%	34.3%	50.0%	2.9%

Q36 Why do you distrust China?

Answered: 1147 (Respondents who chose the "Little confidence" and "No confidence" options in Q34)

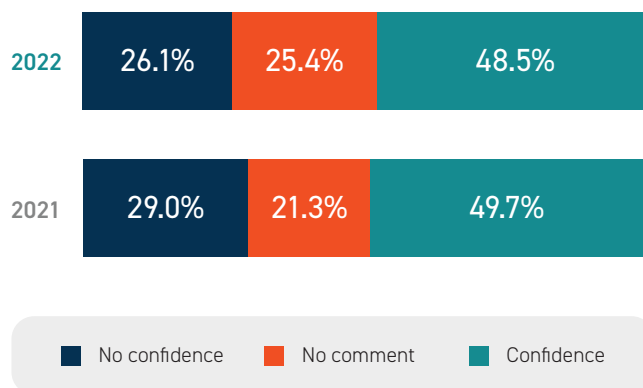
Country	China does not have the capacity or political will for global leadership		My country's political culture and worldview are incompatible with China's		I am concerned that China is distracted with its internal affairs and thus cannot focus on global concerns and issues		China's economic and military power could be used to threaten my country's interests and sovereignty		I do not consider China a responsible or reliable power	
	2021	2022	2021	2022	2021	2022	2021	2022	2021	2022
ASEAN	9.1%	8.4%	6.4%	7.6%	10.7%	11.4%	54.5%	49.6%	19.3%	23.0%
Brunei	13.3%	2.8%	0.0%	11.1%	13.3%	8.3%	73.3%	50.0%	0.0%	27.8%
Cambodia	0.0%	7.1%	9.1%	0.0%	9.1%	14.3%	63.6%	71.4%	18.2%	7.1%
Indonesia	14.1%	4.5%	11.5%	13.4%	11.5%	28.4%	48.7%	40.3%	14.1%	13.4%
Laos	15.8%	16.7%	5.3%	11.1%	26.4%	16.7%	36.8%	38.9%	15.8%	16.7%
Malaysia	11.8%	11.6%	8.8%	7.2%	11.8%	8.7%	50.0%	49.3%	17.6%	23.2%
Myanmar	8.6%	14.1%	7.5%	7.1%	10.8%	5.5%	57.0%	47.9%	16.1%	25.4%
Philippines	1.8%	4.0%	5.5%	4.9%	3.6%	2.7%	74.5%	70.7%	14.5%	17.7%
Singapore	6.7%	8.4%	8.9%	3.9%	2.2%	5.8%	58.9%	38.1%	23.3%	43.9%
Thailand	12.4%	10.7%	5.6%	10.7%	16.9%	16.1%	37.1%	39.3%	28.1%	23.2%
Vietnam	6.8%	4.3%	1.5%	6.5%	1.5%	7.5%	45.5%	50.5%	44.7%	31.2%

THE EUROPEAN UNION

The European Union's trust rating has remained strong although the ratings declined this year. The number of respondents having confidence in the EU to "do the right thing" has declined from 49.7% in 2021 to 48.5% this year while the share of distrust has also decreased. The highest levels of trust towards the EU are shared strongly by respondents from the Philippines (59.8%), Cambodia (59.2%), Myanmar (58.5%), Malaysia (57.8%), and Vietnam (55.5%). Myanmar, in particular, sees a big jump in its trust towards the EU from 37.2% in 2021 to 58.5% this year. Meanwhile, Brunei is the only country where the distrust level (37.7%) outstripped the trust level (30.2%).

The region's positive view towards the EU is largely attributed to its leadership in championing human rights and climate change which is considered an asset for global peace and security (38.4%). This view is more pronounced in Brunei (62.5%), Thailand (44.2%), and the Philippines (37.7%). Among this cohort, 30.9% also think that the EU is a responsible stakeholder that respects and champions international law.

In the group of EU sceptics, 30.1% are concerned that the EU is distracted with its internal affairs thus cannot focus on global concerns and issues. This view is shared strongly by respondents from Cambodia (46.2%), the Philippines (38.7%), Thailand (36.1%), and Indonesia (32.5%).



Q37 How confident are you that the EU will “do the right thing” to contribute to global peace, security, prosperity, and governance?

Country	No confidence		Little confidence		No comment		Confident		Very confident	
	2021	2022	2021	2022	2021	2022	2021	2022	2021	2022
ASEAN	3.4%	4.9%	25.6%	21.2%	21.3%	25.4%	43.6%	42.0%	6.1%	6.5%
Brunei	3.0%	9.4%	27.3%	28.3%	33.3%	32.1%	36.4%	28.3%	0.0%	1.9%
Cambodia	0.0%	3.7%	30.8%	12.3%	26.9%	24.7%	42.3%	58.0%	0.0%	1.2%
Indonesia	3.1%	6.1%	20.9%	24.4%	16.3%	26.0%	51.2%	40.5%	8.5%	3.1%
Laos	10.0%	2.3%	15.0%	20.5%	30.0%	45.5%	42.5%	27.3%	2.5%	4.5%
Malaysia	1.7%	4.4%	32.5%	20.7%	10.3%	17.0%	41.9%	43.7%	13.7%	14.1%
Myanmar	8.3%	3.4%	31.4%	16.3%	23.1%	21.7%	35.3%	49.4%	1.9%	9.1%
Philippines	1.5%	3.5%	22.4%	24.3%	13.4%	12.5%	50.7%	50.8%	11.9%	9.0%
Singapore	1.9%	5.4%	33.5%	25.7%	19.0%	24.8%	38.0%	35.6%	7.6%	8.6%
Thailand	3.1%	7.7%	20.6%	23.1%	19.1%	24.8%	47.3%	38.5%	9.9%	6.0%
Vietnam	1.7%	2.8%	21.7%	16.7%	21.7%	25.0%	50.3%	47.9%	4.6%	7.6%

10% weighting was applied to 2021 data resulting in a change of results.

Q38 Why do you trust the EU?

Answered: 887 (Respondents who chose the "Confident" and "Very confident" options in Q37)

Country	The EU has vast economic resources and the political will to provide global leadership		My country's political culture and worldview are compatible with the EU's		The EU is a responsible stakeholder that respects and champions international law		The EU's stance on environment, human rights, and climate change is an asset for global peace and security		I respect Europe and admire its civilisation and culture	
	2021	2022	2021	2022	2021	2022	2021	2022	2021	2022
ASEAN	13.8%	19.4%	1.9%	4.5%	35.7%	30.9%	44.1%	38.4%	4.4%	6.8%
Brunei	0.0%	25.0%	0.0%	0.0%	58.3%	6.3%	41.7%	62.5%	0.0%	6.3%
Cambodia	18.2%	22.9%	0.0%	10.4%	36.4%	31.3%	45.5%	31.3%	0.0%	4.2%
Indonesia	14.3%	21.1%	1.3%	3.5%	24.7%	29.8%	53.2%	42.1%	6.5%	3.5%
Laos	33.3%	21.4%	5.6%	7.1%	16.7%	28.6%	38.9%	35.7%	5.6%	7.1%
Malaysia	9.2%	12.8%	1.5%	2.6%	40.0%	44.9%	46.2%	29.5%	3.1%	10.3%
Myanmar	24.1%	27.3%	3.4%	4.4%	22.4%	18.5%	41.4%	36.6%	8.6%	13.2%
Philippines	9.5%	20.5%	0.0%	2.5%	31.0%	35.6%	52.4%	37.7%	7.1%	3.8%
Singapore	2.8%	9.2%	1.4%	2.0%	47.2%	49.0%	44.4%	34.7%	4.2%	5.1%
Thailand	8.0%	15.4%	4.0%	9.6%	30.7%	25.0%	54.7%	44.2%	2.7%	5.8%
Vietnam	18.8%	18.8%	2.1%	2.5%	50.0%	40.0%	22.9%	30.0%	6.3%	8.8%

Q39 Why do you distrust the EU?

Answered: 430 (Respondents who chose the "Little confidence" and "No confidence" options in Q37)

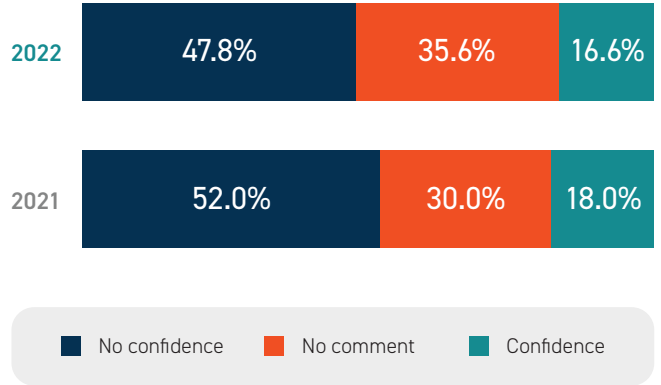
Country	The EU does not have the capacity or political will for global leadership		My country's political culture and worldview are incompatible with the EU's		I am concerned that the EU is distracted with its internal affairs and thus cannot focus on global concerns and issues		The EU's stance on environment, human rights, and climate change could be used to threaten my country's interests and sovereignty		I do not consider the EU a responsible or reliable power	
	2021	2022	2021	2022	2021	2022	2021	2022	2021	2022
ASEAN	22.7%	26.7%	10.4%	12.4%	39.3%	30.1%	15.5%	17.7%	12.1%	13.1%
Brunei	10.0%	25.0%	10.0%	10.0%	30.0%	25.0%	40.0%	5.0%	10.0%	35.0%
Cambodia	12.5%	0.0%	12.5%	0.0%	50.0%	46.2%	0.0%	38.5%	25.0%	15.4%
Indonesia	19.4%	25.0%	12.9%	12.5%	38.7%	32.5%	19.4%	17.5%	9.7%	12.5%
Laos	30.0%	20.0%	10.0%	50.0%	30.0%	20.0%	10.0%	10.0%	20.0%	0.0%
Malaysia	20.0%	35.3%	10.0%	2.9%	47.5%	26.5%	15.0%	20.6%	7.5%	14.7%
Myanmar	22.6%	33.3%	17.7%	14.5%	12.9%	30.4%	24.2%	2.9%	22.6%	18.8%
Philippines	12.5%	18.9%	18.8%	9.0%	37.5%	38.7%	18.8%	19.8%	12.5%	13.5%
Singapore	44.6%	59.4%	0.0%	2.9%	44.6%	27.5%	5.4%	4.3%	5.4%	5.8%
Thailand	38.7%	11.1%	9.7%	11.1%	35.5%	36.1%	12.9%	33.3%	3.2%	8.3%
Vietnam	17.1%	39.3%	2.4%	10.7%	65.9%	17.9%	9.8%	25.0%	4.9%	7.1%

INDIA

Close to half of the respondents have a high level of distrust towards India (47.8%) although this view dwindled slightly from last year (52.0%). Doubts about India are most prevalent in Singapore (67.1%), Brunei (56.6%), Malaysia (56.2%), Myanmar (54.9%), Indonesia (54.2%), and Thailand (52.2%). Meanwhile, the strongest support for India is found among respondents from the Philippines (35.3%) and Vietnam (29.9%). Myanmar has the most drastic shift in perceptions towards India. Myanmar's trust level dropped from 37.1% in 2021 to 8.6% this year.

Among those who distrust India, 38.0% believe that India does not have the capacity or political will for global leadership. This view is more pronounced in Vietnam (51.1%), Cambodia (45.5%), Thailand (41.0%), and Indonesia (40.8%). A third (32.4%) also raise a concern that India is distracted with its internal and sub-continental affairs and thus cannot focus on global concerns and issues.

In the cohort who has trust in India, 37.1% believe that it is a responsible stakeholder that respects and champions international law. This view is shared strongly in Cambodia (57.1%), Singapore (43.8%), and Laos (40.0%).



Q40 How confident are you that India will “do the right thing” to contribute to global peace, security, prosperity, and governance?

Country	No confidence		Little confidence		No comment		Confident		Very confident	
	2021	2022	2021	2022	2021	2022	2021	2022	2021	2022
ASEAN	15.0%	20.0%	37.0%	27.8%	30.0%	35.6%	16.4%	16.0%	1.6%	0.6%
Brunei	9.1%	20.8%	51.5%	35.8%	30.3%	35.8%	9.1%	7.5%	0.0%	0.0%
Cambodia	15.4%	21.0%	42.3%	19.8%	26.9%	42.0%	11.5%	17.3%	3.8%	0.0%
Indonesia	20.2%	20.6%	40.3%	33.6%	29.5%	35.9%	10.1%	9.9%	0.0%	0.0%
Laos	22.5%	25.0%	27.5%	4.5%	37.5%	59.1%	12.5%	11.4%	0.0%	0.0%
Malaysia	26.5%	28.1%	41.0%	28.1%	19.7%	23.7%	10.3%	17.8%	2.6%	2.2%
Myanmar	5.1%	22.9%	27.6%	32.0%	30.1%	36.6%	36.5%	7.7%	0.6%	0.9%
Philippines	7.5%	6.5%	35.8%	28.8%	26.9%	29.5%	25.4%	33.5%	4.5%	1.8%
Singapore	19.6%	26.1%	44.9%	41.0%	25.3%	25.7%	8.9%	6.8%	1.3%	0.5%
Thailand	16.0%	23.1%	32.1%	29.1%	40.5%	29.1%	10.7%	17.9%	0.8%	0.9%
Vietnam	8.6%	5.6%	26.9%	25.7%	33.1%	38.9%	29.1%	29.9%	2.3%	0.0%

10% weighting was applied to 2021 data resulting in a change of results.

Q41 Why do you trust India?

Answered: 315 (Respondents who chose the "Confident" and "Very confident" options in Q40)

Country	India has vast economic resources and the political will to provide global leadership		My country's political culture and worldview are compatible with India's		India is a responsible stakeholder that respects and champions international law		India's military power is an asset for global peace and security		I respect India and admire its civilisation and culture	
	2021	2022	2021	2022	2021	2022	2021	2022	2021	2022
ASEAN	24.5%	20.2%	13.0%	17.1%	25.6%	37.1%	14.2%	6.6%	22.6%	19.0%
Brunei	66.7%	50.0%	0.0%	25.0%	0.0%	25.0%	33.3%	0.0%	0.0%	0.0%
Cambodia	50.0%	21.4%	0.0%	14.3%	0.0%	57.1%	0.0%	0.0%	50.0%	7.1%
Indonesia	30.8%	7.7%	15.4%	38.5%	15.4%	38.5%	7.7%	0.0%	30.8%	15.4%
Laos	0.0%	20.0%	20.0%	0.0%	0.0%	40.0%	40.0%	0.0%	40.0%	40.0%
Malaysia	20.0%	14.8%	13.3%	7.4%	33.3%	37.0%	13.3%	14.8%	20.0%	25.9%
Myanmar	22.4%	23.3%	31.0%	20.0%	24.1%	23.3%	3.4%	3.3%	19.0%	30.0%
Philippines	15.0%	13.5%	10.0%	11.3%	25.0%	34.8%	20.0%	20.6%	30.0%	19.9%
Singapore	0.0%	12.5%	12.5%	6.3%	75.0%	43.8%	6.3%	0.0%	6.3%	37.5%
Thailand	33.3%	18.2%	13.3%	27.3%	20.0%	36.4%	6.7%	13.6%	26.7%	4.5%
Vietnam	7.3%	20.9%	14.5%	20.9%	63.6%	34.9%	10.9%	14.0%	3.6%	9.3%

Q42 Why do you distrust India?

Answered: 811 (Respondents who chose the "Little confidence" and "No confidence" options in Q40)

Country	India does not have the capacity or political will for global leadership		My country's political culture and worldview are incompatible with India's		I am concerned that India is distracted with its internal and sub-continental affairs and thus cannot focus on global concerns and issues		India's economic and military power could be used to threaten my country's interests and sovereignty		I do not consider India a responsible or reliable power	
	2021	2022	2021	2022	2021	2022	2021	2022	2021	2022
ASEAN	41.1%	38.0%	3.3%	6.5%	35.6%	32.4%	2.8%	1.9%	17.2%	21.1%
Brunei	25.0%	20.0%	0.0%	3.3%	50.0%	36.7%	5.0%	0.0%	20.0%	40.0%
Cambodia	60.0%	45.5%	0.0%	15.2%	13.3%	18.2%	0.0%	3.0%	26.7%	18.2%
Indonesia	48.7%	40.8%	1.3%	5.6%	41.0%	29.6%	0.0%	2.8%	9.0%	21.1%
Laos	40.0%	38.5%	5.0%	7.7%	20.0%	38.5%	15.0%	0.0%	20.0%	15.4%
Malaysia	34.2%	34.2%	1.3%	7.9%	46.8%	26.3%	1.3%	1.3%	16.5%	30.3%
Myanmar	45.1%	36.5%	3.9%	8.9%	31.4%	25.0%	3.9%	4.7%	15.7%	25.0%
Philippines	37.9%	33.3%	17.2%	5.7%	34.5%	44.0%	0.0%	2.8%	10.3%	14.2%
Singapore	25.5%	39.6%	1.0%	0.7%	52.0%	38.9%	0.0%	0.0%	21.6%	20.8%
Thailand	46.0%	41.0%	1.6%	8.2%	28.6%	29.5%	1.6%	1.6%	22.2%	19.7%
Vietnam	48.4%	51.1%	1.6%	2.2%	38.7%	37.8%	1.6%	2.2%	9.7%	6.7%

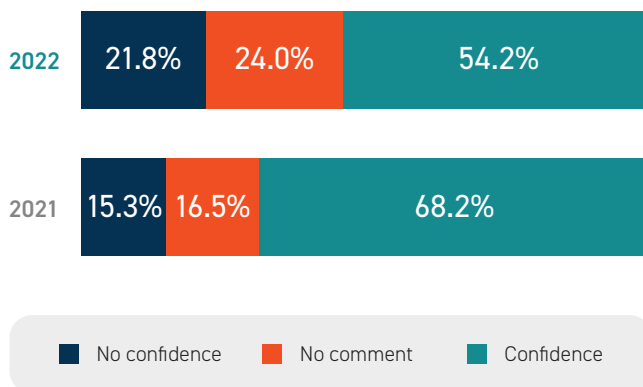
JAPAN

Japan remains the most trusted major power in the region with the overall trust level of 54.2%, although this number declined significantly from 68.2% in 2021. Japan is most trusted in the Philippines (82.3%), Vietnam (63.9%), and Myanmar (58.0%). The largest swing in trust towards Japan is found in Cambodia. Cambodia's trust level dropped significantly from 84.6% to 32.1%.

Among those who believe in Japan, 46.6% think that Japan is a "responsible stakeholder that respects and champions international law." This perception is widely shared among respondents from Singapore (69.3%), Malaysia (57.4%), and Laos (55.0%). A proportion (25.8%) in this cohort also believe that "Japan has vast economic resources and the political will to provide global leadership", particularly among those from Brunei (30.0%), Laos (30.0%), and Vietnam (29.3%).

41.0% of the Japan sceptics argue that "Japan does not have the capacity or political will for global leadership". This is true among respondents from Laos (75.0%), Singapore (57.4%), Brunei (46.2%), Myanmar (42.6%), and Thailand (42.3%). Among

this cohort, 27.2% also think that "Japan is distracted with its internal affairs and relations with its Northeast Asian neighbours (i.e. China and ROK) and thus cannot focus on global concerns and issues".



Q43 How confident are you that Japan will “do the right thing” to contribute to global peace, security, prosperity, and governance?

Country	No confidence		Little confidence		No comment		Confident		Very confident	
	2021	2022	2021	2022	2021	2022	2021	2022	2021	2022
ASEAN	1.6%	6.0%	13.7%	15.8%	16.5%	24.0%	53.2%	44.5%	15.0%	9.7%
Brunei	0.0%	1.9%	15.2%	22.6%	18.2%	18.9%	63.6%	49.1%	3.0%	7.5%
Cambodia	0.0%	19.8%	3.8%	19.8%	11.5%	28.4%	53.8%	24.7%	30.8%	7.4%
Indonesia	3.9%	4.6%	18.6%	15.3%	20.9%	24.4%	51.2%	48.9%	5.4%	6.9%
Laos	2.5%	4.5%	12.5%	4.5%	25.0%	45.5%	40.0%	40.9%	20.0%	4.5%
Malaysia	2.6%	9.6%	23.9%	21.5%	14.5%	18.5%	48.7%	43.0%	10.3%	7.4%
Myanmar	2.6%	4.9%	8.3%	14.6%	12.8%	22.6%	57.7%	46.3%	18.6%	11.7%
Philippines	0.0%	0.3%	9.0%	9.5%	10.4%	8.0%	58.2%	57.3%	22.4%	25.0%
Singapore	1.3%	4.5%	17.7%	23.0%	22.2%	21.2%	47.5%	42.8%	11.4%	8.6%
Thailand	2.3%	7.7%	19.8%	14.5%	13.0%	31.6%	51.1%	40.2%	13.7%	6.0%
Vietnam	1.1%	2.1%	8.6%	12.5%	15.4%	21.5%	60.6%	52.1%	14.3%	11.8%

10% weighting was applied to 2021 data resulting in a change of results.

Q44 Why do you trust Japan?

Answered: 1009 (Respondents who chose the "Confident" and "Very confident" options in Q43)

Country	Japan has vast economic resources and the political will to provide global leadership		My country's political culture and worldview are compatible with Japan's		Japan is a responsible stakeholder that respects and champions international law		Japan's military power is an asset for global peace and security		I respect Japan and admire its civilisation and culture	
	2021	2022	2021	2022	2021	2022	2021	2022	2021	2022
ASEAN	24.0%	25.8%	5.5%	6.3%	52.1%	46.6%	1.5%	2.6%	17.0%	18.7%
Brunei	18.2%	30.0%	0.0%	0.0%	77.3%	50.0%	0.0%	0.0%	4.5%	20.0%
Cambodia	27.3%	26.9%	4.5%	19.2%	45.5%	30.8%	0.0%	3.8%	22.7%	19.2%
Indonesia	23.3%	31.5%	6.8%	9.6%	38.4%	41.1%	2.7%	4.1%	28.8%	13.7%
Laos	33.3%	30.0%	8.3%	0.0%	41.7%	55.0%	0.0%	0.0%	16.7%	15.0%
Malaysia	18.8%	16.2%	5.8%	4.4%	59.4%	57.4%	2.9%	2.9%	13.0%	19.1%
Myanmar	31.1%	26.1%	8.4%	6.4%	37.8%	37.4%	0.8%	1.0%	21.8%	29.1%
Philippines	25.9%	27.7%	3.7%	3.3%	44.4%	45.3%	3.7%	3.6%	22.2%	20.1%
Singapore	12.9%	12.3%	7.5%	5.3%	73.1%	69.3%	1.1%	0.9%	5.4%	12.3%
Thailand	25.9%	27.8%	5.9%	7.4%	45.9%	42.6%	2.4%	1.9%	20.0%	20.4%
Vietnam	22.9%	29.3%	3.8%	7.6%	57.3%	37.0%	1.5%	7.6%	14.5%	18.5%

Q45 Why do you distrust Japan?

Answered: 332 (Respondents who chose the "Little confidence" and "No confidence" options in Q43)

Country	Japan does not have the capacity or political will for global leadership		My country's political culture and worldview are incompatible with Japan's		I am concerned that Japan is distracted with its internal affairs and relations with its Northeast Asian neighbours (i.e. China, Korea and Taiwan), and thus cannot focus on global concerns and issues		Japan's economic and military power could be used to threaten my country's interests and sovereignty		I do not consider Japan a responsible or reliable power	
	2021	2022	2021	2022	2021	2022	2021	2022	2021	2022
ASEAN	43.5%	41.0%	1.5%	8.3%	31.9%	27.2%	1.8%	7.2%	21.2%	16.3%
Brunei	60.0%	46.2%	0.0%	0.0%	40.0%	30.8%	0.0%	15.4%	0.0%	7.7%
Cambodia	0.0%	21.9%	0.0%	3.1%	0.0%	25.0%	0.0%	21.9%	100.0%	28.1%
Indonesia	48.3%	26.9%	0.0%	7.7%	27.6%	38.5%	0.0%	7.7%	24.1%	19.2%
Laos	66.7%	75.0%	0.0%	25.0%	33.3%	0.0%	0.0%	0.0%	0.0%	0.0%
Malaysia	48.4%	33.3%	0.0%	4.8%	32.3%	23.8%	0.0%	7.1%	19.4%	31.0%
Myanmar	52.9%	42.6%	5.9%	7.4%	11.8%	22.1%	5.9%	2.9%	23.5%	25.0%
Philippines	16.7%	30.8%	0.0%	12.8%	66.7%	35.9%	0.0%	10.3%	16.7%	10.3%
Singapore	43.3%	57.4%	0.0%	0.0%	40.0%	24.6%	6.7%	1.6%	10.0%	16.4%
Thailand	51.7%	42.3%	3.4%	7.7%	37.9%	38.5%	0.0%	0.0%	6.9%	11.5%
Vietnam	47.1%	33.3%	5.9%	14.3%	29.4%	33.3%	5.9%	4.8%	11.8%	14.3%

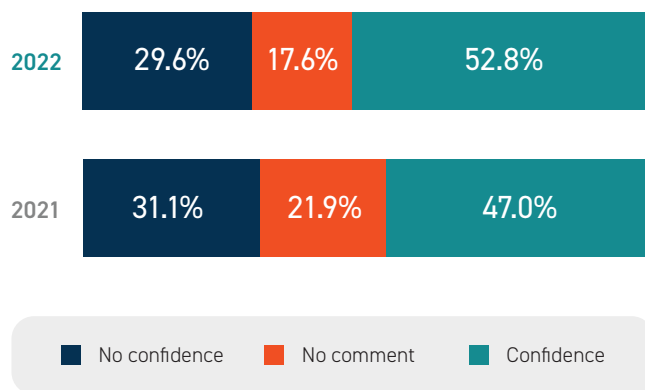
THE UNITED STATES

Under the Biden Administration, the United States garnered more trust among Southeast Asians. The level of trust moved from 47.0% in 2021 to 52.8% this year while the share of US sceptics dropped from 31.1% in 2021 to 29.6% this year.

Confidence in the US is shared widely among respondents from Myanmar (74.6%), Vietnam (72.2%), and the Philippines (66.5%), while US sceptics abound in Brunei (50.9%) and Laos (50.0%). The largest swing in trust towards Washington is found in Myanmar and Thailand. Myanmar's trust towards the US moved from 39.7% in 2021 to 74.6% this year while the level of distrust dwindled from 34.0% to 11.5%. Similarly, the perception of trust in Thailand improved from 39.0% in 2021 to 53.9% this year while the level of distrust plummeted from 45.0% to 26.5%.

Among those who trust the US, 45.5% believe that "the US has vast economic resources and the political will to provide global leadership". This view is widely shared among those from Laos (66.7%) and Vietnam (56.7%). 25.1% of this group also believe that "the US military power is an asset for global peace and security".

Among those who distrust the US, 36.7% are concerned that the US is distracted with its internal affairs and thus cannot focus on global concerns and issues. This is true particularly among those from Vietnam (55.6%), Singapore (52.2%), the Philippines (45.5%), and Myanmar (45.0%).



Q46 How confident are you that the US will “do the right thing” to contribute to global peace, security, prosperity, and governance?

Country	No confidence		Little confidence		No comment		Confident		Very confident	
	2021	2022	2021	2022	2021	2022	2021	2022	2021	2022
ASEAN	6.1%	7.4%	25.0%	22.2%	21.9%	17.6%	42.5%	39.9%	4.5%	12.9%
Brunei	9.1%	9.4%	27.3%	41.5%	15.2%	18.9%	48.5%	28.3%	0.0%	1.9%
Cambodia	0.0%	8.6%	15.4%	19.8%	38.5%	16.0%	42.3%	43.2%	3.8%	12.3%
Indonesia	6.2%	11.5%	26.4%	18.3%	19.4%	23.7%	44.2%	42.0%	3.9%	4.6%
Laos	10.0%	15.9%	30.0%	34.1%	35.0%	29.5%	25.0%	20.5%	0.0%	0.0%
Malaysia	12.8%	11.1%	27.4%	23.0%	12.0%	12.6%	39.3%	29.6%	8.5%	23.7%
Myanmar	7.1%	2.6%	26.9%	8.9%	26.3%	14.0%	36.5%	48.3%	3.2%	26.3%
Philippines	1.5%	3.0%	19.4%	19.0%	16.4%	11.5%	50.7%	50.7%	11.9%	15.8%
Singapore	3.2%	5.0%	27.2%	26.1%	17.7%	13.5%	48.1%	41.4%	3.8%	14.0%
Thailand	9.9%	6.0%	35.1%	20.5%	16.0%	19.7%	35.9%	38.5%	3.1%	15.4%
Vietnam	1.1%	1.4%	14.9%	11.1%	23.4%	15.3%	54.3%	56.9%	6.3%	15.3%

10% weighting was applied to 2021 data resulting in a change of results.

Q47 Why do you trust the US?

Answered: 1020 (Respondents who chose the "Confident" and "Very confident" options in Q46)

Country	The US has vast economic resources and the political will to provide global leadership		My country's political culture and worldview are compatible with the US'		The US is a responsible stakeholder that respects and champions international law		The US' military power is an asset for global peace and security		I respect the US and admire its civilisation and culture	
	2021	2022	2021	2022	2021	2022	2021	2022	2021	2022
ASEAN	50.9%	45.5%	2.8%	5.2%	16.1%	19.5%	28.4%	25.1%	1.7%	4.7%
Brunei	50.0%	43.8%	0.0%	0.0%	12.5%	18.8%	37.5%	37.5%	0.0%	0.0%
Cambodia	58.3%	42.2%	0.0%	11.1%	16.7%	28.9%	25.0%	8.9%	0.0%	8.9%
Indonesia	56.5%	44.3%	3.2%	3.3%	16.1%	19.7%	24.2%	27.9%	0.0%	4.9%
Laos	50.0%	66.7%	0.0%	0.0%	10.0%	11.1%	40.0%	22.2%	0.0%	0.0%
Malaysia	48.2%	43.1%	3.6%	2.8%	32.1%	22.2%	14.3%	23.6%	1.8%	8.3%
Myanmar	51.6%	43.7%	1.6%	3.4%	9.7%	17.6%	35.5%	25.3%	1.6%	10.0%
Philippines	47.6%	43.6%	9.5%	9.8%	16.7%	15.4%	21.4%	28.2%	4.8%	3.0%
Singapore	35.4%	36.6%	8.5%	4.1%	19.5%	25.2%	32.9%	28.5%	3.7%	5.7%
Thailand	54.9%	34.9%	0.0%	12.7%	13.7%	22.2%	31.4%	27.0%	0.0%	3.2%
Vietnam	56.6%	56.7%	1.9%	4.8%	14.2%	13.5%	21.7%	22.1%	5.7%	2.9%

Q48 Why do you distrust the US?

Answered: 403 (Respondents who chose the "Little confidence" and "No confidence" options in Q46)

Country	The US does not have the capacity or political will for global leadership		My country's political culture and worldview are incompatible with the US'		I am concerned that the US is distracted with its internal affairs and thus cannot focus on global concerns and issues		The US' economic and military power could be used to threaten my country's interests and sovereignty		I do not consider the US a responsible or reliable power	
	2021	2022	2021	2022	2021	2022	2021	2022	2021	2022
ASEAN	4.9%	3.9%	6.9%	9.9%	40.5%	36.7%	27.6%	23.5%	20.0%	26.0%
Brunei	0.0%	7.4%	0.0%	7.4%	66.7%	25.9%	8.3%	33.3%	25.0%	25.9%
Cambodia	0.0%	0.0%	0.0%	13.0%	0.0%	30.4%	75.0%	34.8%	25.0%	21.7%
Indonesia	4.8%	5.1%	7.1%	12.8%	28.6%	28.2%	47.6%	41.0%	11.9%	12.8%
Laos	12.5%	4.5%	12.5%	18.2%	31.3%	22.7%	25.0%	27.3%	18.8%	27.3%
Malaysia	4.3%	2.2%	10.6%	2.2%	40.4%	32.6%	23.4%	26.1%	21.3%	37.0%
Myanmar	9.4%	0.0%	28.3%	20.0%	13.2%	45.0%	17.0%	10.0%	32.1%	25.0%
Philippines	7.1%	2.3%	0.0%	4.5%	57.1%	45.5%	21.4%	28.4%	14.3%	19.3%
Singapore	4.2%	5.8%	0.0%	1.4%	77.1%	52.2%	8.3%	5.8%	10.4%	34.8%
Thailand	3.4%	6.5%	0.0%	19.4%	47.5%	29.0%	28.8%	22.6%	20.3%	22.6%
Vietnam	3.6%	5.6%	10.7%	0.0%	42.9%	55.6%	21.4%	5.6%	21.4%	33.3%

TRUST AND DISTRUST RANKINGS OF MAJOR POWERS IN THE REGION

The “trust” and “distrust” rankings of five powers who can most potentially influence Southeast Asia are based on a consolidated five-point Likert scale of negative and positive responses (“no confidence” to “very confident”). The “no comment” responses are removed from this analysis. A proportionate 10% weightage was applied in the analysis.

Japan squeaked through by a slim margin of 1.4% to remain the most trusted major power in Southeast Asia. 54.2% of regional respondents say that Japan is most trusted, followed by the US (52.8%), the EU (48.5%), China (26.8%) and India (16.6%). Japan suffered a drop in its trust ranking from 68.2% to 54.2% this year. At the country-level, the most drastic drop came from Cambodia whose trust in Japan went from 84.6% to 32.1%. Other perceptible drops were from Thailand (from 64.8% to 46.2%) and Myanmar (from 76.3% to 58.0%). In terms of distrust, the view that Japan's economic and military power was a threat increased from 1.8% to 7.2%. The view that Japan was distracted with internal and Northeast Asia affairs decreased slightly from 31.9% to 27.2%. Japan's strategic engagement with Southeast Asia has not changed in the last year except that the high-level face-to-face engagement between Southeast Asian and Japanese leaders may have been limited due to COVID-19 as compared to the higher-level touch-point that ASEAN has had with China, in large part due to President Xi Jinping making his first ever attendance at the ASEAN-China special commemorative summit (Note: ASEAN-China Summits are usually attended at the Premier level).

Southeast Asians reflected a boost in confidence on the United States' anticipated return to the region under the Biden Administration by 5.8% over last year's results. Myanmar's trust increased almost doubled from 39.7% to 74.6%, much of it can be explained in light of its own political crisis and hopes for resolution and leadership that might come from external powers like the US. What is surprising, at the country-level, is Brunei's precipitous drop in trust for the US from 48.5% in 2021 to 30.2%. Interestingly, while we have seen an increase in the region's view of the US' leadership in multilateral rules-based order, the view of the US having the political will to provide global leadership actually declined from 50.9% to 45.5%.

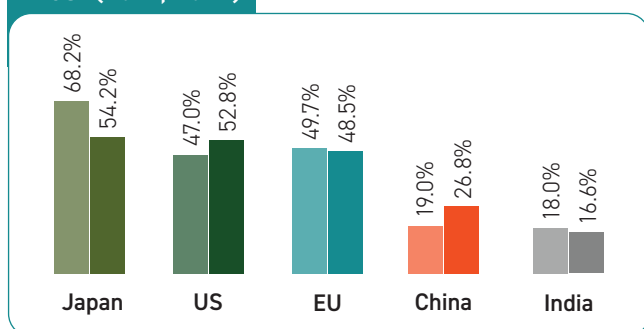
The European Union dropped from second to third place this year with 48.5% of Southeast Asians sticking to reasons that the EU is a responsible international law stakeholder and that it has the ability to provide leadership. Distrust levels of the EU dipped slightly from 29.0% to 26.1%. What is curious is that Cambodia's view of the threat that the EU's stance on the environment, human rights and climate change posed to national interest and sovereignty went from 0.0% to 38.5%. Similarly, Thailand went three-fold in the strength of this view from 12.9% to 33.3%.

The region's trust in China has improved from 19.0% to 26.8% with Cambodia showing a 47.1% increase in trust. Conversely, the greatest drop in trust rankings of China came from Myanmar which saw a trust drop from 12.1% to 1.7%. The proportion of distrust in China has also dropped slightly from 59.6% in 2021 to 58.1% in 2022. Among those who trust China, the view of China as a responsible stakeholder in international law went from 7.1% to 13.6% and its military as an asset for global peace from 3.0% to 13.1%. Among those who distrust China, the majority (49.6%) are concerned that China's economic and military might may be a tool to threaten their country.

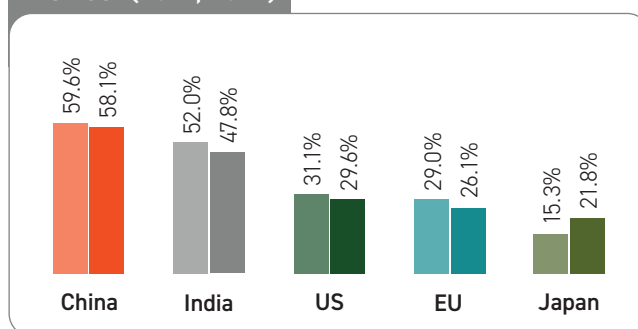
Although levels of distrust in India declined from 52.0% to 47.8%, the region's level of trust also decreased from 18.0% to 16.6%. Among those who distrust India, 38.0% say that India does not have the capacity or political will to demonstrate global leadership. Among those who trust India, 37.1% say that India is a responsible stakeholder in international law. ASEAN and India will celebrate the 30th anniversary of ASEAN-India relations with the theme “ASEAN-India Friendship Year in 2022. It remains to be seen if these perceptions will change.

One thing is obvious this year: the region remains preoccupied with the tone and tenor of the US-China geo-political rivalry that affected all areas of politics, trade, defence and security. Japan and the EU's trust rankings suffered not due to lack of engagement with the region but due to Southeast Asians' attention on the US and China's actions.

Trust (2021, 2022)



Distrust (2021, 2022)



10% weighting was applied to 2021 data resulting in a change of results and rankings.

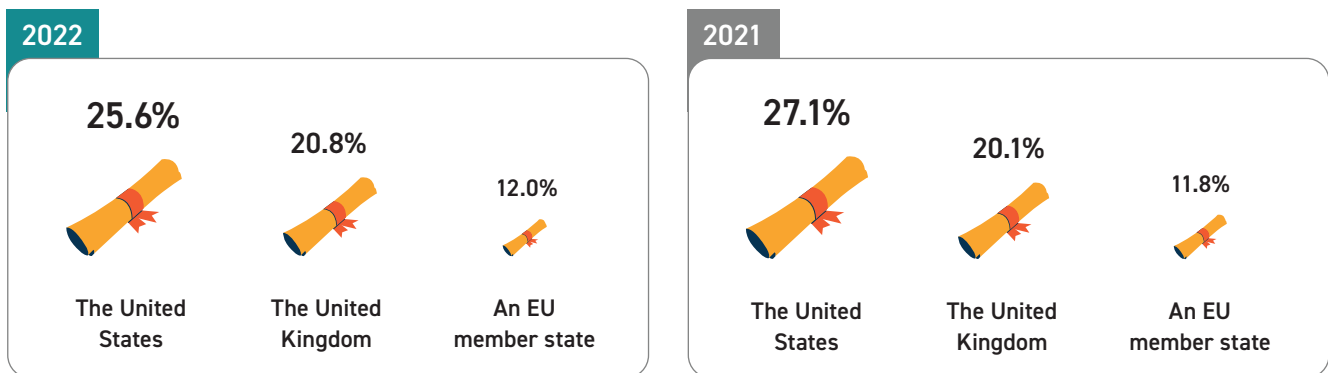
SECTION VI: Soft Power

This final section gauges the extent of soft power in the region based on tertiary education and travel choices. **Weighting was applied in this section for both 2021 and 2022 results in order to provide trend analysis.**

PREFERENCE FOR TERTIARY EDUCATION

The United States remains the region's top preference for tertiary education (25.6%), followed by the UK (20.8%), the EU (12.0%), Australia (9.9%), and Japan (9.6%). Only 5.8% chose an ASEAN member state, although the number slightly increased from 5.2% last year.

The US is the most popular destination for tertiary education among five ASEAN member states: Singapore (45.9%), Myanmar (35.1%), Vietnam (34.0%), the Philippines (29.5%), and Malaysia (26.7%). The EU is most popular in Indonesia (19.1%). The UK is most popular in Brunei (60.4%) and Thailand (26.5%). Japan is the top choice in Laos (27.3%). Meanwhile, Cambodia sees a significant rise in those who chose China (34.6%) compared to last year (3.8%).



Q49 Which country would be your first choice if you (or your child) were offered a scholarship to a university?

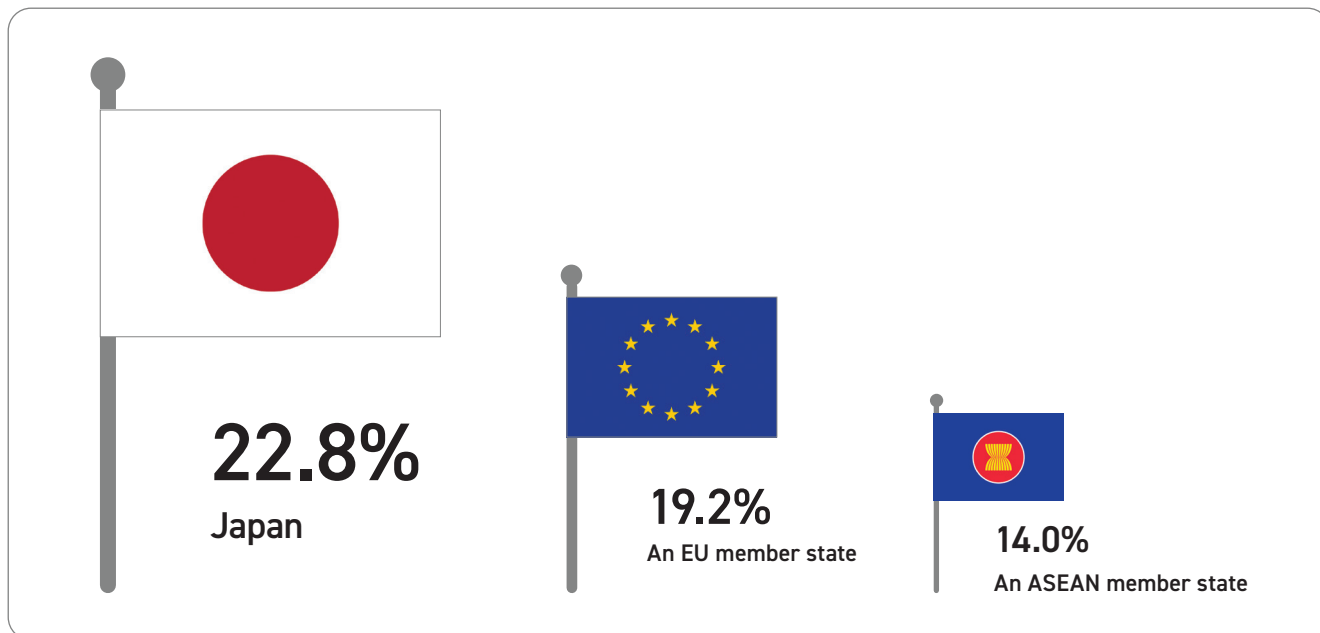
Country	An ASEAN member state	Australia	China	India	An EU member state	Japan	Republic of Korea	New Zealand	The United Kingdom	The United States
ASEAN	5.8%	9.9%	8.8%	0.2%	12.0%	9.6%	2.0%	5.4%	20.8%	25.6%
BN	9.4%	0.0%	1.9%	0.0%	1.9%	9.4%	3.8%	5.7%	60.4%	7.5%
KH	12.3%	9.9%	34.6%	0.0%	12.3%	3.7%	2.5%	1.2%	6.2%	17.3%
ID	8.4%	7.6%	10.7%	0.0%	19.1%	10.7%	6.1%	7.6%	11.5%	18.3%
LA	6.8%	15.9%	6.8%	0.0%	9.1%	27.3%	0.0%	6.8%	11.4%	15.9%
MY	7.4%	13.3%	5.9%	0.7%	9.6%	5.2%	1.5%	8.9%	20.7%	26.7%
MM	2.3%	12.9%	0.0%	0.0%	11.1%	11.4%	3.4%	5.1%	18.6%	35.1%
PH	4.0%	13.0%	1.0%	0.0%	19.3%	14.2%	1.0%	6.3%	11.8%	29.5%
SG	2.3%	5.4%	2.7%	0.0%	8.1%	2.7%	0.0%	4.5%	28.4%	45.9%
TH	0.9%	12.0%	13.7%	0.9%	11.1%	3.4%	0.0%	6.0%	26.5%	25.6%
VN	4.2%	9.0%	11.1%	0.0%	18.1%	8.3%	1.4%	1.4%	12.5%	34.0%

10% weighting was applied to 2021 data resulting in a change of results.

MOST PREFERRED COUNTRY TO VISIT

Japan remains the most popular destination to visit among Southeast Asians (22.8%), followed by the European Union (19.2%), and an ASEAN member state (14.0%). Japan tops the list of travel destinations among respondents from six ASEAN member states: Laos (40.9%), Singapore (31.1%),

Thailand (24.8%), the Philippines (24.5%), Indonesia (23.7%), and Malaysia (18.5%). The EU is most preferred in Vietnam (25.0%) and Myanmar (20.9%). Meanwhile China is an overwhelmingly popular choice among Cambodian respondents (29.6%).



Q50 Which country is your favourite holiday destination?

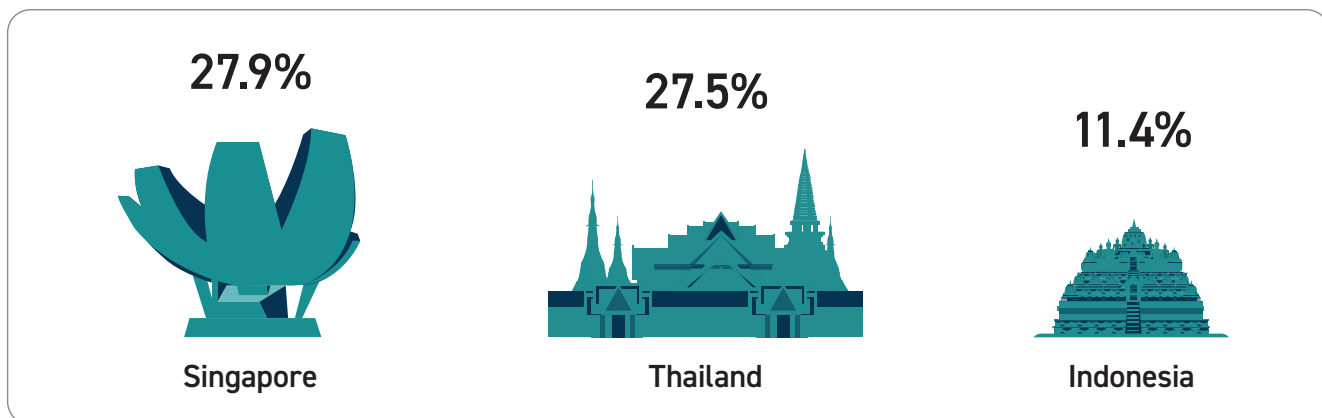
Country	An ASEAN member state	Australia	China	India	An EU member state	Japan	Republic of Korea	New Zealand	The United Kingdom	The United States
ASEAN	14.0%	5.1%	7.2%	0.3%	19.2%	22.8%	8.5%	9.5%	5.0%	8.4%
BN	20.8%	5.7%	3.8%	0.0%	11.3%	18.9%	17.0%	3.8%	15.1%	3.8%
KH	17.3%	6.2%	29.6%	0.0%	18.5%	4.9%	6.2%	4.9%	6.2%	6.2%
ID	22.1%	3.1%	4.6%	0.0%	22.9%	23.7%	6.1%	11.5%	0.0%	6.1%
LA	11.4%	6.8%	2.3%	0.0%	18.2%	40.9%	2.3%	9.1%	4.5%	4.5%
MY	17.0%	5.9%	7.4%	0.7%	13.3%	18.5%	11.9%	17.0%	3.7%	4.4%
MM	8.3%	2.0%	0.0%	1.1%	20.9%	17.7%	19.7%	16.9%	4.9%	8.6%
PH	14.0%	5.5%	0.5%	0.5%	21.5%	24.5%	7.8%	6.3%	3.5%	16.0%
SG	14.4%	7.7%	2.7%	0.0%	21.2%	31.1%	5.9%	4.1%	7.7%	5.4%
TH	6.0%	5.1%	11.1%	0.9%	18.8%	24.8%	3.4%	12.8%	2.6%	14.5%
VN	8.3%	3.5%	10.4%	0.0%	25.0%	22.9%	4.9%	8.3%	2.1%	14.6%

10% weighting was applied to 2021 data resulting in a change of results.

MOST PREFERRED COUNTRY TO VISIT IN THE REGION

Among the respondents who chose an ASEAN member state as their favourite destination, Singapore is the top choice with a share of 27.9%, followed by Thailand (27.5%), and Indonesia (11.4%). Singapore is the top choice among respondents from Cambodia (71.4%), Laos (60.0%), the Philippines (32.1%), and Indonesia (31.0%).

Interestingly, some ASEAN respondents turned to domestic tourism as international travel activities reeled from the COVID-19 pandemic restrictions in 2021. For instance, most of the respondents from Thailand (57.1%) prefer to travel in their own country. Similarly, respondents from Indonesia (27.6%) and the Philippines (25.0%) chose their own countries respectively as their second favourite destination in the region.



Q51 Among ASEAN member states, which one is your favourite destination to visit?

Answered: 218 (Respondents who chose the "An ASEAN member state" option in Q50)

Country	Brunei Darussalam	Cambodia	Indonesia	Laos	Malaysia	Myanmar	Philippines	Singapore	Thailand	Vietnam
ASEAN	1.0%	2.5%	11.4%	2.8%	8.4%	4.1%	5.6%	27.9%	27.5%	8.8%
BN	0.0%	0.0%	9.1%	0.0%	45.5%	0.0%	0.0%	18.2%	27.3%	0.0%
KH	0.0%	7.1%	0.0%	0.0%	7.1%	0.0%	0.0%	71.4%	7.1%	7.1%
ID	3.4%	0.0%	27.6%	3.4%	10.3%	0.0%	0.0%	31.0%	13.8%	10.3%
LA	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	60.0%	20.0%	20.0%
MY	4.3%	0.0%	21.7%	4.3%	0.0%	0.0%	8.7%	21.7%	39.1%	0.0%
MM	0.0%	3.4%	10.3%	0.0%	0.0%	10.3%	6.9%	13.8%	37.9%	17.2%
PH	1.8%	0.0%	5.4%	0.0%	3.6%	0.0%	25.0%	32.1%	21.4%	10.7%
SG	0.0%	0.0%	9.4%	3.1%	9.4%	21.9%	15.6%	0.0%	34.4%	6.3%
TH	0.0%	14.3%	14.3%	0.0%	0.0%	0.0%	0.0%	14.3%	57.1%	0.0%
VN	0.0%	0.0%	16.7%	16.7%	8.3%	8.3%	0.0%	16.7%	16.7%	16.7%

10% weighting was applied to 2021 data resulting in a change of results and rankings.



