

# PERSPECTIVE

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## **Southeast Asian Views on the United States: Perceptions Versus Objective Reality**

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*US President Joe Biden (L) meets Cambodia's Prime Minister Hun Sen on the sidelines of the Association of Southeast Asian Nations (ASEAN) Summit in Phnom Penh on 12 November 2022. Picture: SAUL LOEB/AFP.*

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**EXECUTIVE SUMMARY**

- Data trends from the ISEAS – Yusof Ishak Institute’s State of Southeast Asia annual survey carried out between 2019 and 2023 suggest an enduring tendency among the respondents in ASEAN member states to underestimate the United States’ power and influence in the region. The respondents have overwhelmingly identified China not only as the most influential economic power in Southeast Asia, but also as the most influential politically and strategically. Other indicators suggest a more nuanced picture.
- The trends also suggest that ASEAN countries have remained ambivalent about the US’ regional leadership role on multiple fronts. The majority of ASEAN member states generally do not look to the US to champion the global free trade agenda. The US fares slightly better regarding perceptions of its leadership role in upholding a rules-based order and international law but this confidence in the US is not decisive. The European Union is most often looked to as an alternative to US leadership on this front.
- Among the ASEAN6 economies – Indonesia, Thailand, Singapore, Vietnam, Malaysia and the Philippines – confidence in the US as a reliable strategic partner and provider of regional security has been steadily declining since 2021. The decline has been sharpest in Singapore, Vietnam and Indonesia.
- But when forced to choose between China and the US, the region in general has expressed a growing preference to align with the US. However, it is significant that in 2023, respondents from the three Muslim-majority states - Indonesia, Malaysia and Brunei - picked China over the US.
- These indicators suggest that there is still a reservoir of goodwill towards the US in the region, but this is being depleted in some countries and cannot be taken for granted. Secondly, many ASEAN countries probably still hope that the US would exercise stronger leadership in the region especially amidst growing anxieties about the rise of China, but there is a clear undercurrent of pessimism and some disillusionment even amongst some of the US’ closest partners about its willingness and commitment to do so.

## INTRODUCTION

Every year since 2019, the ISEAS – Yusof Ishak Institute has been publishing its State of Southeast Asia (SSEA) survey report. This seeks to capture the perceptions of experts and opinion-makers across Southeast Asia on strategic matters. The survey employs a random purposive sampling of over 100 respondents in each of the 10 ASEAN member states – constituting a sample size of around 1,000 respondents ASEAN-wide. A 10% weighting average is then applied to each country's responses to calculate the regional average to ensure that each country is equally represented, similar to ASEAN's decision-making process.

Having polled respondents for their perceptions of major power rivalries and the pressing challenges facing the ASEAN region over the last five years, some trends have emerged.

This paper focuses on the data trends surrounding the region's attitudes towards the United States. It crystallizes some key takeaways on the region's perceptions of US power and influence in contrast to those that it has on China, views on US leadership on the economic, strategic and political fronts, and levels of trust and confidence in the US. The data used in this paper are drawn from the forthcoming report from the ASEAN Studies Centre at ISEAS on the 5-year data trends from the 2019-2023 SSEA survey reports.

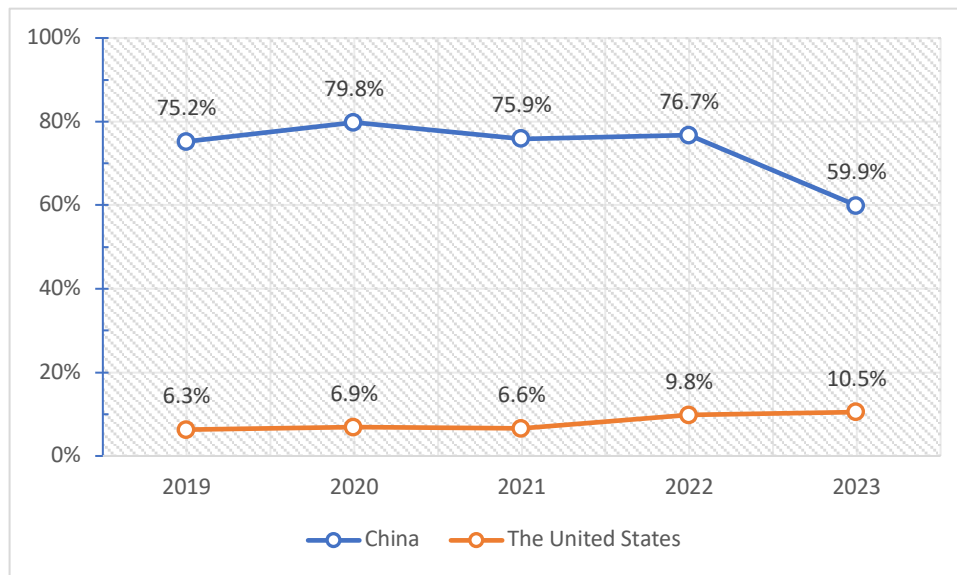
## POWER PERCEPTIONS ON THE UNITED STATES AND ON CHINA

Data trends from the SSEA annual survey between 2019-2023 suggest that Southeast Asian countries have a chronic tendency to underestimate the extent of the United States' power and influence in the region in comparison to China's. Put differently, the perceptions of China's overarching dominance in the region appear overblown when more objective indicators are taken into consideration.

### *Economic Power Perceptions*

In the SSEA surveys carried out from 2019 to 2022, more than 75% of ASEAN-wide respondents consistently identified China as the region's most influential economic power; this figure dipped significantly in 2023 to 59.9% (a clear consequence of China's extended Covid-19 lockdown). At the same time, the US has consistently polled low scores in this regard, with the percentage of respondents who said the US was the region's most influential economic power hovering in the single digits — a mean of 7.4%. In 2023, however, that figure rose slightly to 10.5% (Figure 1).

Figure 1. Percentage of survey respondents who identified China or the United States as the region’s most influential economic power



These perceptions should not be surprising, given how often mention of the region’s dependence on China for its economic future is made. It is often reiterated that China is the largest trading partner for the region as a whole, with total trade reaching US\$669.2 billion in 2021, and also the top trading partner for all of ASEAN’s member states, save Brunei, whose top trading partner is Singapore.

But it is less often noted that the region runs a widening trade deficit with China. As Stewart Paterson from Hinrich Foundation points out, while ASEAN exports to China have grown, the propensity of China to import from ASEAN remains very low. The natural consequence of this asymmetry has been the widening of ASEAN’s goods trade deficit with China, which grew from US\$15 billion in 2011 to US\$82 billion in 2020.<sup>1</sup> In contrast, the US, despite having a smaller trading volume with the region (US\$364.5 billion in 2021), is still a vital export market for ASEAN goods. In 2021, ASEAN’s goods trade surplus with the US was US\$145.9 billion, compared to its goods trade deficit with China of US\$107.7 billion that same year.<sup>2</sup> In fact, since 2013, trade with the US has consistently generated the largest surpluses for ASEAN from among its trading partners.

On the FDI front, China’s overall FDI stock in the region, while on the uptrend, still lags that of the US by far. In 2020, the US’ FDI stock in ASEAN was US\$328.5 billion.<sup>3</sup> In contrast, China’s outward FDI stock in ASEAN countries as of 2021 was US\$140.28 billion.<sup>4</sup> According to statistics from the ASEAN Secretariat, the cumulative value of US FDI investment between 2012 and 2021 was US\$198.7 billion, compared to US\$98.7 billion for China over the same period. To be sure, while US investments in the region are heavily concentrated in a few countries, with Singapore taking the lion’s share, China’s are spread more widely across the region – contributing to perceptions of China’s outsized influence.

According to data drawn from the Lowy Institute’s Power Index, China has now become the top FDI investor in seven of the ten ASEAN member states. (Table 1) But when considering only the larger economies of the ASEAN6, China is the top FDI investor for three of them – Indonesia (making up 20% of FDI inflows into the country cumulatively from 2012 to 2021), Malaysia (28.5%) and the Philippines (22.2%). For the remaining three countries, the largest FDI source is Japan (for Thailand at 38.8%), the US (for Singapore at 26.8%) and South Korea (for Vietnam at 22.9%).

**Table 1: The top FDI investor in each ASEAN member states**  
(Cumulative FDI inflows from 2012 to 2021)

ASEAN Country (by nominal GDP in US\$)	Top FDI Investor (Country)	Top investor’s percentage of total inv into host country
Indonesia (\$1.4 trillion)	China	20%
Thailand (\$574 billion)	Japan	38.8%
Singapore (\$515 billion)	United States	26.8%
Vietnam (\$449 billion)	South Korea	22.9%
Malaysia (\$447 billion)	China	28.5%
The Philippines (\$441 billion)	China	22.2%
Myanmar (\$64 billion)	China	15.2%
Cambodia (\$32.6 billion)	China	24.4%
Brunei (\$15.5 billion)	China	93.6%
Laos (\$14.1 billion)	China	25.2%

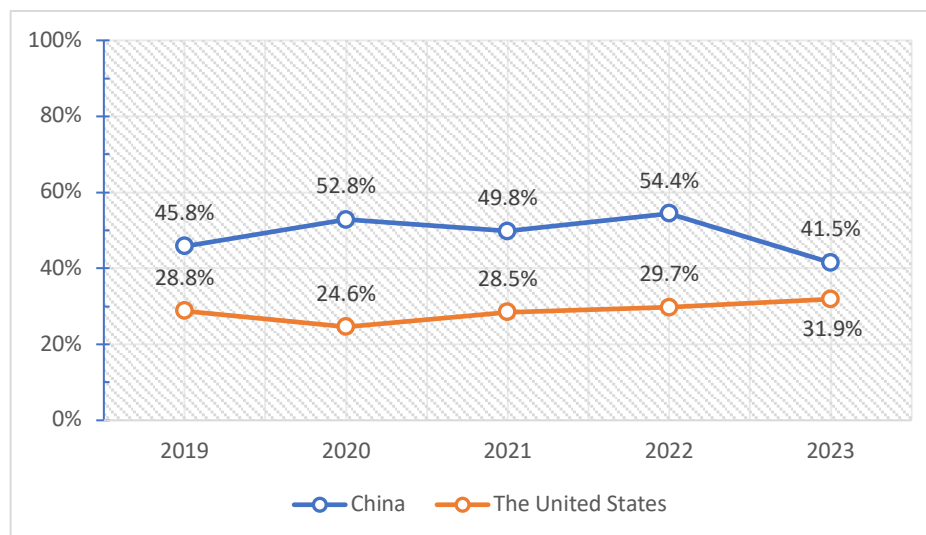
Sources: IMF World Economic Outlook Database (April 2023) and Lowy Institute Asia Power Index 2023

*Political and Strategic Power Perceptions*

While regional experts and opinion makers may be excused for exaggerating China’s economic influence in the region, what is more surprising is the region’s pick for the country with the most political and strategic influence in Southeast Asia. Over the past five years, an average of 49% of ASEAN-wide respondents chose China, compared to the mean of 28.1% who recognized the US as the most politically and strategically influential country in Southeast Asia. (Figure 2).

The latter perception is clearly at odds with more objective measures of political and strategic measures of power. According to the Lowy Institute’s Asia Power Index 2023 Edition, the US remains on top in the rankings of Comprehensive Power.<sup>5</sup> In terms of military capability (which takes into account defence spending, armed forces and organization, weapons and platforms, signature capabilities and Asian military posture), the US is ranked first, with an index score of 90.7. China comes second with a relatively low index score of 68.1. Where defence networks and partnerships are concerned, the US is also ranked first, with an index score of 84.6 compared to China, which is ranked 7<sup>th</sup> with an index score of 23.7. However, in the category of diplomatic influence, China has pipped the US for the top spot with a score of 91.5, compared to the US’ 89.3. This is consistent with the findings of the SSEA surveys which suggest that regional countries think China’s influence is greater than its actual might. As the Lowy Institute Power Index report puts it, the US has been an “underachiever”, seeing how its actual resources and capabilities exceed the extent of its influence.

*Figure 2. Percentage of survey respondents who identified China or the United States as the region’s most politically and strategically influential power*



## **TRUST AND CONFIDENCE: PERCEPTIONS OF US LEADERSHIP**

The trends from ISEAS’ SSEA survey offer some clues as to why the US has been “underachieving” in regional influence. In general, the region has been ambivalent and unconvinced about the US’ leadership role on multiple fronts.

A majority of ASEAN member states generally do not look to the US to champion the global free trade agenda. Over the past four years, ASEAN respondents have, on average, tended not to consider the US as the country in which they have most confidence in upholding the global free trade agenda (except in 2022) – preferring instead to pick the EU and ASEAN for that spot. (Table 2) In 2023, the only countries whose respondents cited the greatest confidence in the US’ leadership on this issue were Myanmar (53%), the Philippines (30.3%) and Vietnam (33.8%). The erosion of confidence in US leadership on the trade front is most likely driven by

its clear protectionist turn over the years. The US’ longstanding tussles with the WTO Appellate Body and Washington’s efforts to limit the scope of its jurisdiction in ruling on trade disputes are seen as clear instances where the US privileged its national interests over global trade rules.<sup>6</sup> The US’ tightened investment screening regimes in critical technologies (as reflected in its CFIUS regulations and CHIPS Act) will probably also intensify concerns that US trade and investment flows into the region would increasingly be driven by its own national security and ‘friend-shoring’ considerations.

*Table 2: Percentage of survey respondents who had the most confidence in the following countries and/or regional organizations to champion the global free trade agenda*

	<b>ASEAN</b>	<b>Australia</b>	<b>China</b>	<b>EU</b>	<b>Japan</b>	<b>US</b>
<b>2020</b>	N.A.	7.1%	16.5%	26.9%	27.1%	13.0%
<b>2021</b>	21.5%	3.1%	13.2%	21.5%	15.5%	19.7%
<b>2022</b>	15.5%	1.4%	24.6%	14.1%	9.0%	30.1%
<b>2023</b>	23.5%	3.0%	14.8%	17.6%	9.2%	21.9%

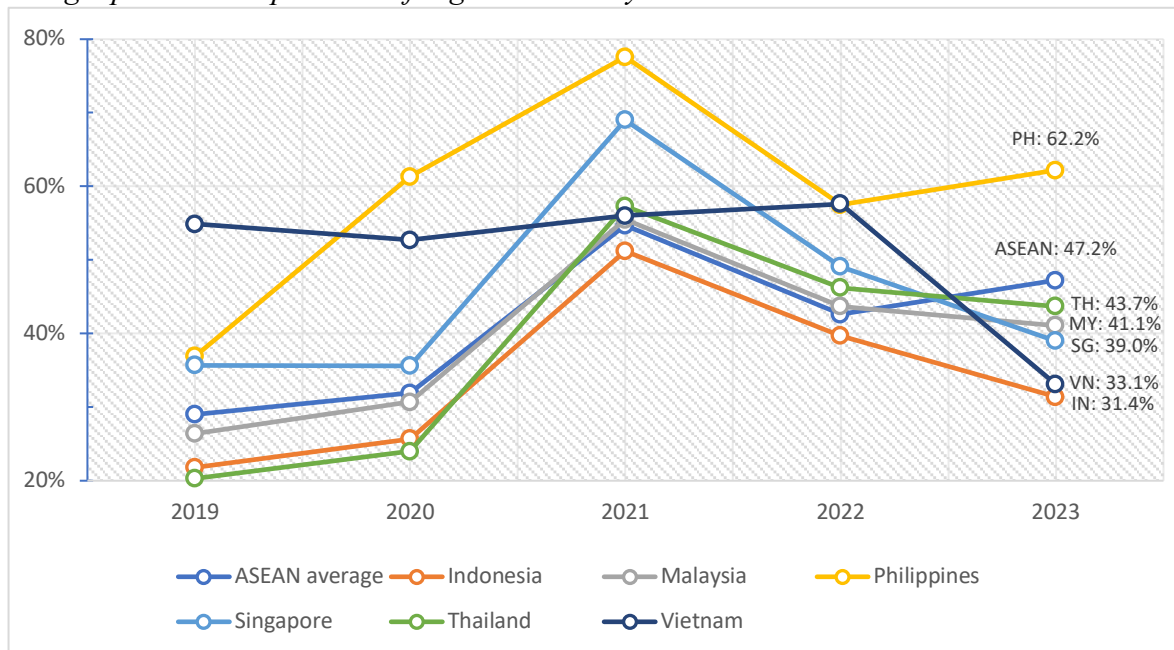
The US fares slightly better regarding perceptions of its leadership role in upholding a rules-based order and international law – but the region’s confidence in the US on this matter is not decisive. The European Union is most often looked to as an alternative to US leadership on this front. In 2020 and 2021, respondents across ASEAN tended most often to cite the European Union as the entity in which they had most confidence in upholding the global rules-based order. In 2022 and 2023, it was the US that was most often cited – though its average score saw a large dip from 36.6% in 2022 to 27.1% in 2023. (Table 3) In 2023, only five of the 10 ASEAN members states had the most respondents indicating confidence in US leadership on this front – these were Cambodia (48.5%), Myanmar (52.2%), the Philippines (36.4%), Singapore (31.3%) and Vietnam (39.7%). Quite evident in the trends are the ‘Trump effect’ and ‘Biden effect’ which saw confidence in US leadership plunge during the Trump years and spike upwards following the election of Joe Biden.

*Table 3: Percentage of survey respondents who had the most confidence in the following countries and/or regional organizations to provide leadership in maintaining the rules-based order and upholding international law*

	<b>ASEAN</b>	<b>Australia</b>	<b>China</b>	<b>EU</b>	<b>Japan</b>	<b>US</b>
<b>2020</b>	N.A.	5.1%	6.6%	33.4%	21.3%	23.7%
<b>2021</b>	17.5%	2.4%	4.4%	32.6%	11.6%	24.5%
<b>2022</b>	16.8%	1.9%	13.6%	16.6%	7.7%	36.6%
<b>2023</b>	21.0%	3.4%	5.3%	23.0%	8.6%	27.1%

However, data also suggest that the pessimism about US leadership cannot just be attributed to the disruptive impact Trump had. The latest SSEA survey results suggest that the Biden effect has been short-lived. Confidence levels in the US have generally dipped sharply from their peak in 2022. In 2023, only three of the ten ASEAN member states had a majority of respondents having either full confidence or confidence in the US as a strategic partner and provider of regional security – these were Cambodia (76.9%), Myanmar (53%) and the Philippines (62.2%). Significantly, among the ASEAN6 countries – Indonesia, Thailand, Singapore, Vietnam, Malaysia and the Philippines – there has since 2021 been a steady decline in confidence in the US as a reliable strategic partner and as provider of regional security. The declines have been sharpest in Singapore, Vietnam and Indonesia (Figure 3).

*Figure 3. Percentage of respondents who had full confidence or confidence in the US as a strategic partner and provider of regional security*



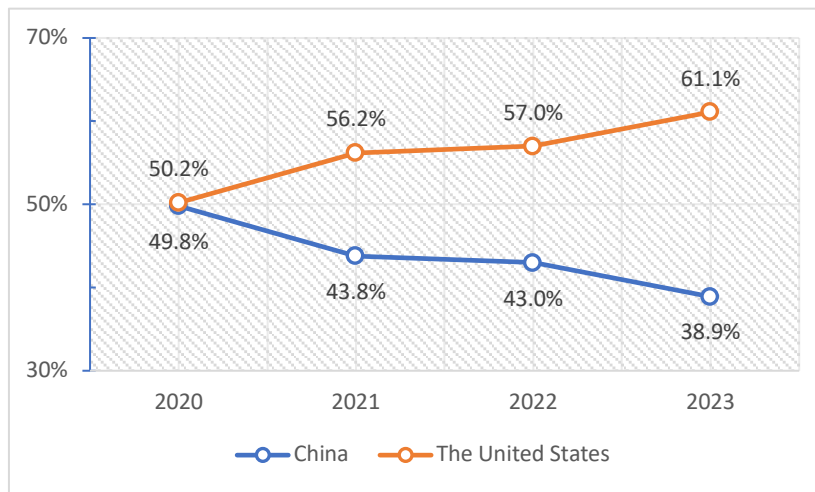
## **IF FORCED TO CHOOSE: US LEADERSHIP STILL PREFERRED**

But when forced to choose between China and the US, the region in general has expressed a growing preference to align with the US, a clear reflection of the growing anxieties regional countries have over China’s rise and perceptions of its growing assertiveness. In the SSEA 2020 edition which first posed the question “If ASEAN were forced to align itself with one of the two strategic rivals (the US or China), which should it choose?”, the answers were fairly evenly split – with 50.2% of the ASEAN-wide respondents choosing the US, and 49.8% choosing China.

Over the years, the region’s preference to align with the US has steadily strengthened – and in 2023, 61.1% of respondents said that ASEAN should align with the US, while just 38.9% chose China. (Figure 4)

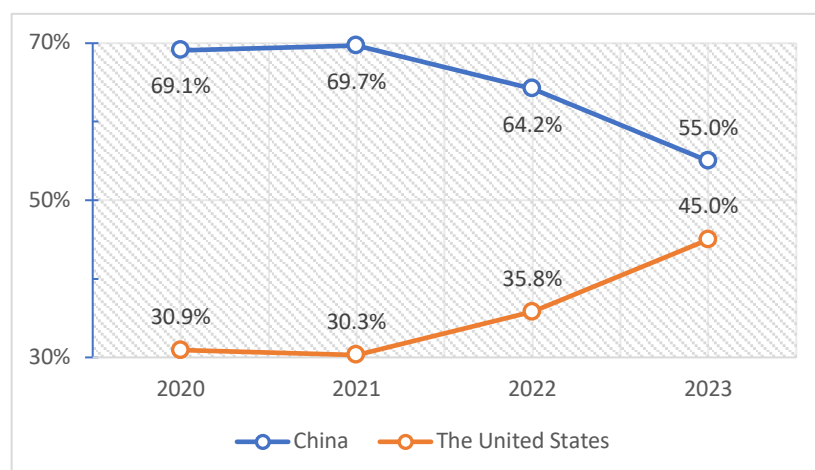


Figure 4. Percentages of ASEAN-wide survey respondents who say ASEAN should choose the US or China if forced to align with one of the two strategic rivals

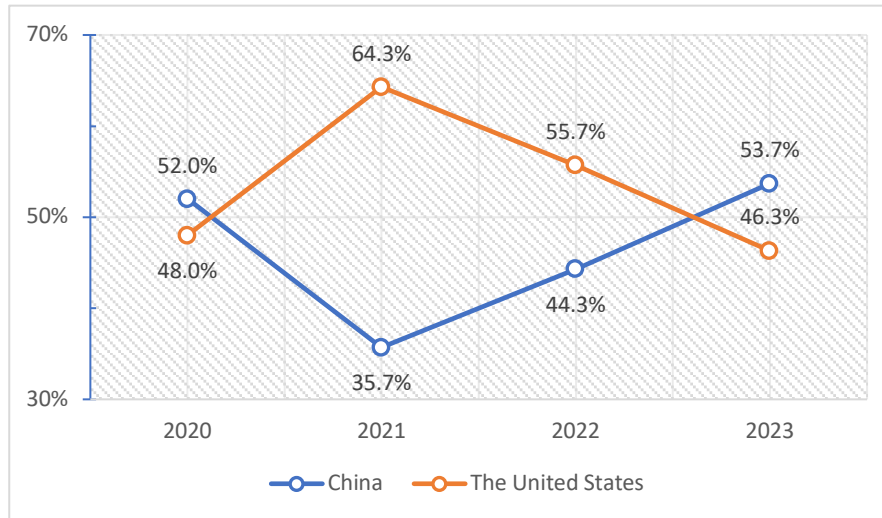


However, what is particularly significant about the 2023 survey is that only the Muslim-majority states in ASEAN picked China over the US – 53.7% of respondents from Indonesia said ASEAN should align with China, while among the Malaysians and Bruneians, 54.8% and 55% respectively indicated likewise. (Figure 4 a, b, c) Several factors probably account for this result. Firstly, the preference to align with China is likely a clear reflection of the perceptions of China’s growing economic influence in their respective countries. China has become the top FDI investor for all three countries. But also salient are the strong undercurrents of anti-US and anti-West sentiments in these countries, which are probably also shared among the elites and policymakers. These are driven by longstanding perceptions of the US bias against the Muslim world on hot-button issues like the Palestinian cause and resentment against US exceptionalism and perceived double-standards in global affairs.

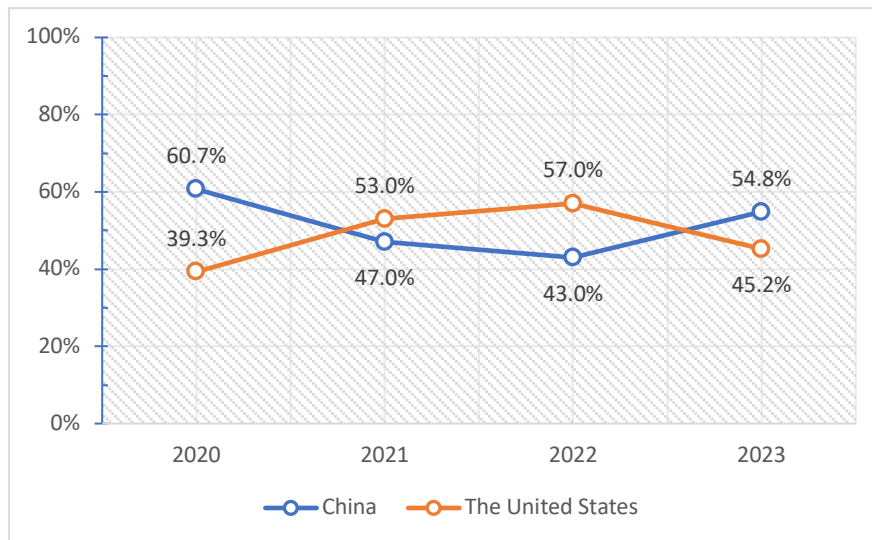
Figure 4a. Percentages of survey respondents from BRUNEI who say ASEAN should choose the US or China if forced to align with one of the two strategic rivals



*Figure 4b. Percentages of survey respondents from INDONESIA who say ASEAN should choose the US or China if forced to align with one of the two strategic rivals*



*Figure 4c. Percentages of survey respondents from MALAYSIA who say ASEAN should choose the US or China if forced to align with one of the two strategic rivals*



## WHAT SHOULD THE US DO?

These indicators telegraph a particular message to the US. They suggest that while there is still a reservoir of goodwill towards the US in the region, this is being depleted in some countries and cannot be taken for granted. The data also suggest that many ASEAN countries probably still hope that the US would exercise stronger leadership in the region especially amidst growing anxieties about the rise of China – but there is a clear undercurrent of pessimism and some disillusionment even amongst some of the US’ closest partners about US willingness and commitment to do so.

Over the years, when ASEAN respondents were asked whether they are confident that the US would “do the right thing” for global peace, security, prosperity and governance, more respondents in most countries would say that they were confident in the US rather than not confident. But it is clear that among the ASEAN6 countries, there have been significant drops in confidence in all six countries except the Philippines, where confidence in the US seems to be steadily rising (Figure 5).

Figure 5. Percentages of respondents who believe that US will “do the right thing” to contribute to global peace, security, prosperity and governance

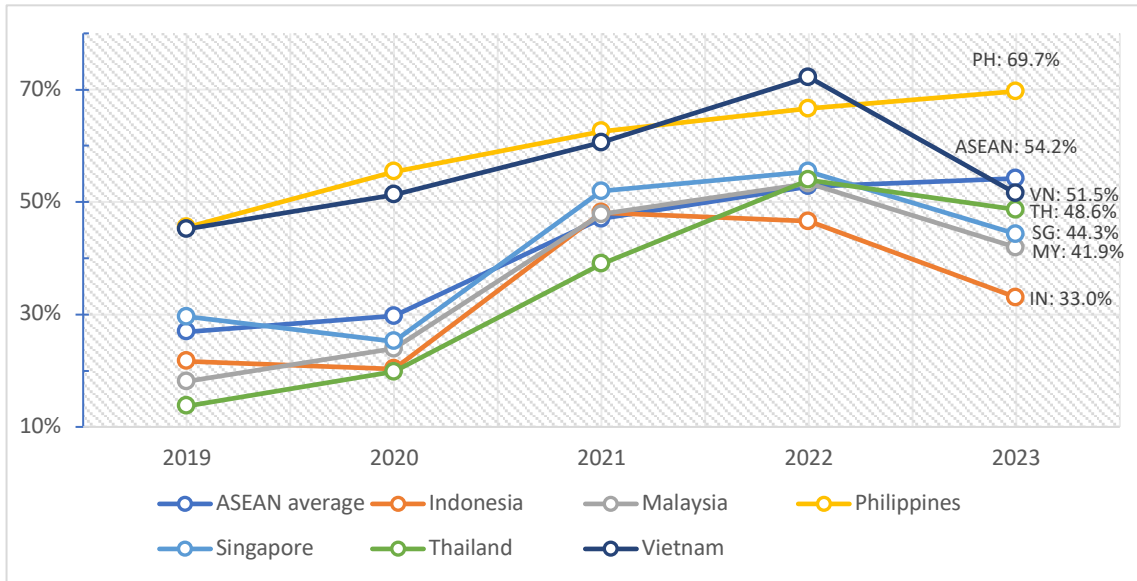


Figure 6. Reasons why survey respondents who had indicated confidence in the US trust the US

**Q51 Why do you trust the US?**

697 respondents who chose the “Confident” and “Very Confident” options in Q50

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	
	2022	2023	2022	2023	2022	2023	2022	2023	2022	2023
ASEAN	45.5%	39.2%	5.2%	7.3%	19.5%	18.2%	25.1%	30.0%	4.7%	5.4%
Brunei	43.8%	16.7%	0.0%	13.0%	18.8%	44.4%	37.5%	20.4%	0.0%	5.6%
Cambodia	42.2%	20.2%	11.1%	3.5%	28.9%	17.5%	8.9%	55.3%	8.9%	3.5%
Indonesia	44.3%	52.5%	3.3%	7.5%	19.7%	12.5%	27.9%	25.0%	4.9%	2.5%
Laos	66.7%	31.9%	0.0%	7.2%	11.1%	18.8%	22.2%	36.2%	0.0%	5.8%
Malaysia	43.1%	50.0%	2.8%	5.8%	22.2%	11.5%	23.6%	19.2%	8.3%	13.5%
Myanmar	43.7%	44.8%	3.4%	3.0%	17.6%	10.4%	25.3%	38.8%	10.0%	3.0%
Philippines	43.6%	39.1%	9.8%	17.4%	15.4%	13.0%	28.2%	23.2%	3.0%	7.2%
Singapore	36.6%	38.0%	4.1%	5.4%	25.2%	21.7%	28.5%	29.3%	5.7%	5.4%
Thailand	34.9%	41.4%	12.7%	8.6%	22.2%	22.9%	27.0%	24.3%	3.2%	2.9%
Vietnam	56.7%	57.1%	4.8%	1.4%	13.5%	8.6%	22.1%	28.6%	2.9%	4.3%

Source: The State of Southeast Asia 2023 Survey Report, ISEAS – Yusof Ishak Institute, p. 53

When asked why they trust the US, it is significant that ASEAN respondents in the 2022 and 2023 surveys overwhelmingly refer to the US' power and resources, and *not* to the US' political culture or worldview (Figure 6). It is also significant that the topmost reason why ASEAN respondents say they have little confidence in the US is their concern that the US is too distracted with its internal affairs and thus cannot focus on global concerns.

This suggests that one of the most important things the US can do to improve its credibility and stature in the region is to get its domestic house in order. And until it does, the US should also recognize which buttons *not* to press – values-driven foreign policy rhetoric cuts little ice, not least because it elicits cynicism and a backlash of criticisms about hypocrisy and double-standards. As the data suggest, the region is looking to US leadership not because it believes in US culture, values and worldviews but because of nagging anxieties about China's rise and a hope that the US would still be able to bring its political, economic and military resources to bear and provide a balance of power in the region. Evidently, many in the region still want to see the United States strong again.

## ENDNOTES

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<sup>1</sup> Stewart Paterson, "To ease ASEAN's dependency on imports from China, strengthen intra-ASEAN trade", Hinrich Foundation, 22 February 2022,

<https://www.hinrichfoundation.com/research/article/ftas/aseans-import-dependency-intra-asean-trade/>

<sup>2</sup> *ASEAN Statistical Yearbook 2022*, ASEAN Secretariat, [https://www.aseanstats.org/wp-content/uploads/2023/04/ASYB\\_2022\\_423.pdf](https://www.aseanstats.org/wp-content/uploads/2023/04/ASYB_2022_423.pdf), p. 67.

<sup>3</sup> Ibid.

<sup>4</sup> "China's outward FDI stock to ASEAN as of 2021, by country", Statista,

<https://www.statista.com/statistics/722630/china-outward-fdi-stock-asean-by-country/>

<sup>5</sup> Lowy Institute Asia Power Index 2023, <https://power.lowyinstitute.org/>. The Lowy Institute measures Comprehensive Power across eight themes: economic capability, military capability, resilience, future resources, economic relationships, defence networks, diplomatic influence and cultural influence.

<sup>6</sup> Sarah Anne Aarup, "[Reform or die? If the US gets its way, the WTO might do both](https://www.politico.eu/article/reform-die-usa-washington-world-trade-organization-wto-ngozi-okonjo-iweala-joe-biden/)", *POLITICO*, 9 May 2023, <https://www.politico.eu/article/reform-die-usa-washington-world-trade-organization-wto-ngozi-okonjo-iweala-joe-biden/> – POLITICO

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