

THE STATE OF
**SOUTHEAST
ASIA**
2024

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.

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ABOUT THE SURVEY

The *State of Southeast Asia* survey, now in its 6th year, continues to gauge the views and perceptions of Southeast Asians on geopolitical developments affecting the region, key international affairs and how ASEAN Dialogue Partners have engaged with the region over the preceding year.

The objective of *The State of Southeast Asia* survey is to present a snapshot of the prevailing attitudes among those in a position to inform or influence policy on regional issues. The survey is not meant to present a definitive view of issues in the region. This year's survey was conducted over a period of seven weeks from 3 January 2024 to 23 February 2024. The survey was offered in six language options – English, Bahasa Indonesia, Burmese, Khmer, Thai, and Vietnamese. A total of 1,994 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, age, and education. **Section II** explores the regional outlook and provides viewpoints on international affairs in the past year. **Section III** examines regional influence and leadership of major and middle powers. **Section IV** looks into ASEAN's options in the changing regional political-security architecture. **Section V** measures perceptions of trust among Southeast Asians towards five countries – China, US, Japan, the European Union, and India. **Section VI** gauges levels of soft power in the region based on travel and work relocation choices. The questions and results have been reorganised for optimal flow and reporting. Figures have been rounded up/down to the nearest one decimal point, and may not add up to 100.0% exactly.

METHODOLOGY

We have continued to make improvements in methodology. Eligibility criteria were tightened this year based on nationality, age, affiliation, and education. Respondents were further screened on their general knowledge of ASEAN and level of interest in current affairs.

Putting aside branching questions, the survey comprised **51 questions** in total which took approximately **20 to 35 minutes** to complete. It was conducted completely online using a mixed sampling method. A total of **1,994** Southeast Asians completed the survey from both non-panel and panel provider.

Respondents came from **5 affiliation categories**: (a) academia, think-tankers or researchers; (b) private sector representatives; (c) civil society, NGO or media representatives; (d) government officials; and (e) regional or international organisations personnel.

A **10% weighting average** was applied 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 geographical or population size. Final analysis of regional sentiment was conducted on the weighted data set. A strict set of criteria during the data cleaning process was applied to remove self-selection bias, speeders, and straight-liners in order to maintain data quality and integrity.

Note: No weighting was applied to respondent profile Questions 1 to 4. A different statistical method was applied to Question 26. It was analysed using a rank-sum method. A 10% weightage was applied to each country to ensure proportionality of responses, followed by a calculation of survey-weighted mean ranks and scores for each of the Dialogue Partners.

SURVEY HIGHLIGHTS

1

Southeast Asia continues to face unprecedented challenges in the rapidly changing global geopolitical and economic environment and the evolving dynamics between major powers. Unemployment and economic recession remain the region's most pressing concern (57.7%), followed by the impact of climate change (53.4%), and the intensifying economic tensions between major powers (47.0%). Terrorism continues to rank last (10.0%).

57.7% Unemployment and economic recession

53.4% Climate change and more extreme weather events

47.0% Intensifying economic tensions between major powers



46.5% Israel-Hamas conflict

39.9% Aggressive behaviour in the South China Sea

39.4% Russia-Ukraine War

39.4% Global scam operations

2

Political divisions, territorial disputes, and spill-over effects from conflicts continue to be strategic uncertainties facing the region. Israel-Hamas conflict (46.5%) and aggressive behaviour in the South China Sea (39.9%) are the region's top geopolitical concerns followed by the Russia-Ukraine war (39.4%), and global scam operations (39.4%) tied at third place. Implications arising from the January 2024 Taiwan elections is ranked last (7.6%).

3

A large proportion of Southeast Asia respondents are concerned that Israel's attack on Gaza has gone too far. Rise in extremist activities (29.7%), diminished trust in international law and rules-based order (27.5%), and erosion of domestic social cohesion (17.5%) are the most serious impacts of the Israel-Hamas conflict on Southeast Asia.

Rise in extremist activities impacting domestic and regional security

29.7%

Diminished trust in international law and rules-based order

27.5%

Erosion of domestic social cohesion due to religious divisions

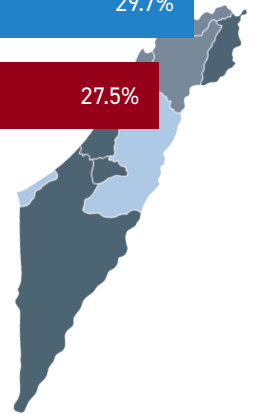
17.5%

Greater ASEAN disunity due to differences in member states' positions

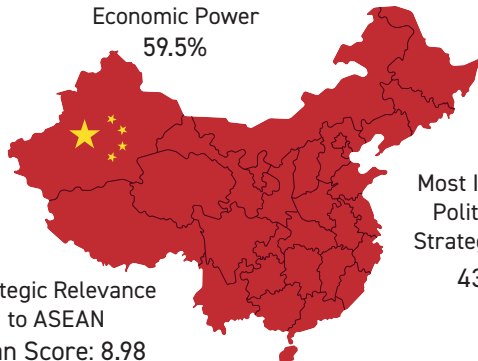
15.4%

Does not impact Southeast Asia

9.9%



Most Influential Economic Power
59.5%



Most Influential Political and Strategic Power
43.9%

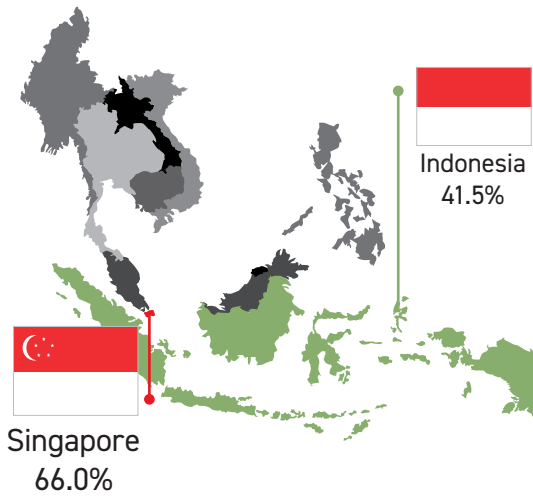
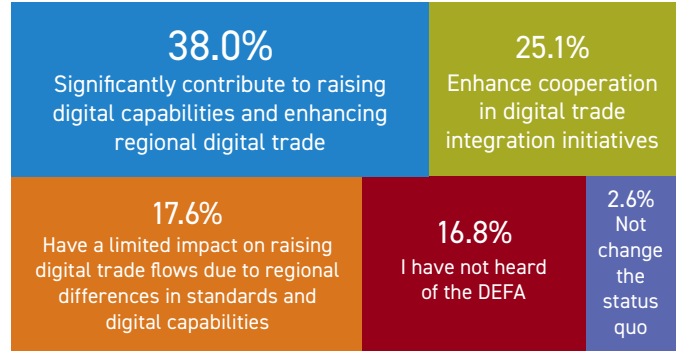
Strategic Relevance to ASEAN
Mean Score: 8.98

4

China continues to be seen as the most influential economic (59.5%) and political-strategic (43.9%) power in the region, outpacing the US by significant margins in both domains. Among ASEAN's eleven Dialogue Partners, China (mean score of 8.98 out of 11.0) tops the charts in terms of strategic relevance to ASEAN, followed by the US (8.79), and Japan (7.48). The partners of least strategic relevance are: India (5.04), Canada (3.81) and New Zealand (3.70).

5

Touted as the world's first regional digital economy agreement, 38.0% of respondents feel that the ASEAN Digital Economy Framework Agreement (DEFA) would significantly contribute to raising digital capabilities and enhancing regional digital trade while 2.6% feel that it will not change the status quo. 16.8% of the respondents are not aware of the existence of the agreement.

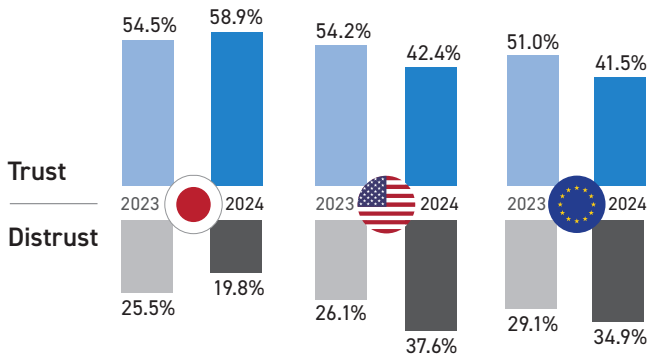
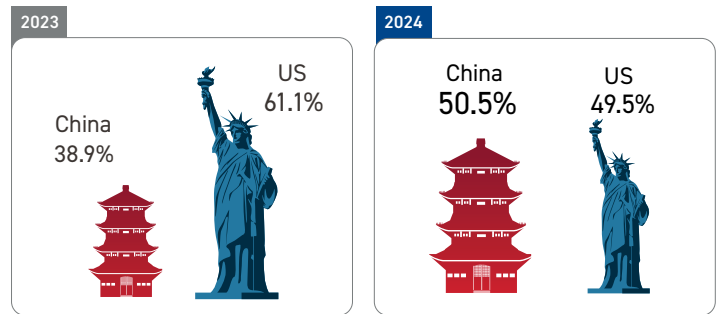


6

Singapore and Indonesia, two original ASEAN founding members, are acknowledged as having made the biggest contributions to ASEAN's long-term development and progress. Singapore holds 66.0% whereas Indonesia holds 41.5% of the votes for regional leadership.

7

China has edged past the US to become the prevailing choice (50.5%) if the region were forced to align itself in the on-going US-China rivalry. The US as a choice dropped from 61.1% in the previous year to 49.5%. Close to half of the respondents (46.8%) believe that ASEAN should enhance its resilience and unity to fend off pressures from the two major powers.



8

Japan remains the most trusted major power among Southeast Asians (58.9%). The US comes in a distant second (42.4%), outpacing the EU (41.5%) by a narrow margin. Half of the respondents (50.1%) express distrust towards China with 45.5% of them fearing that China could use its economic and military power to threaten their country's interest and sovereignty.

SECTION I

Respondents' Profile

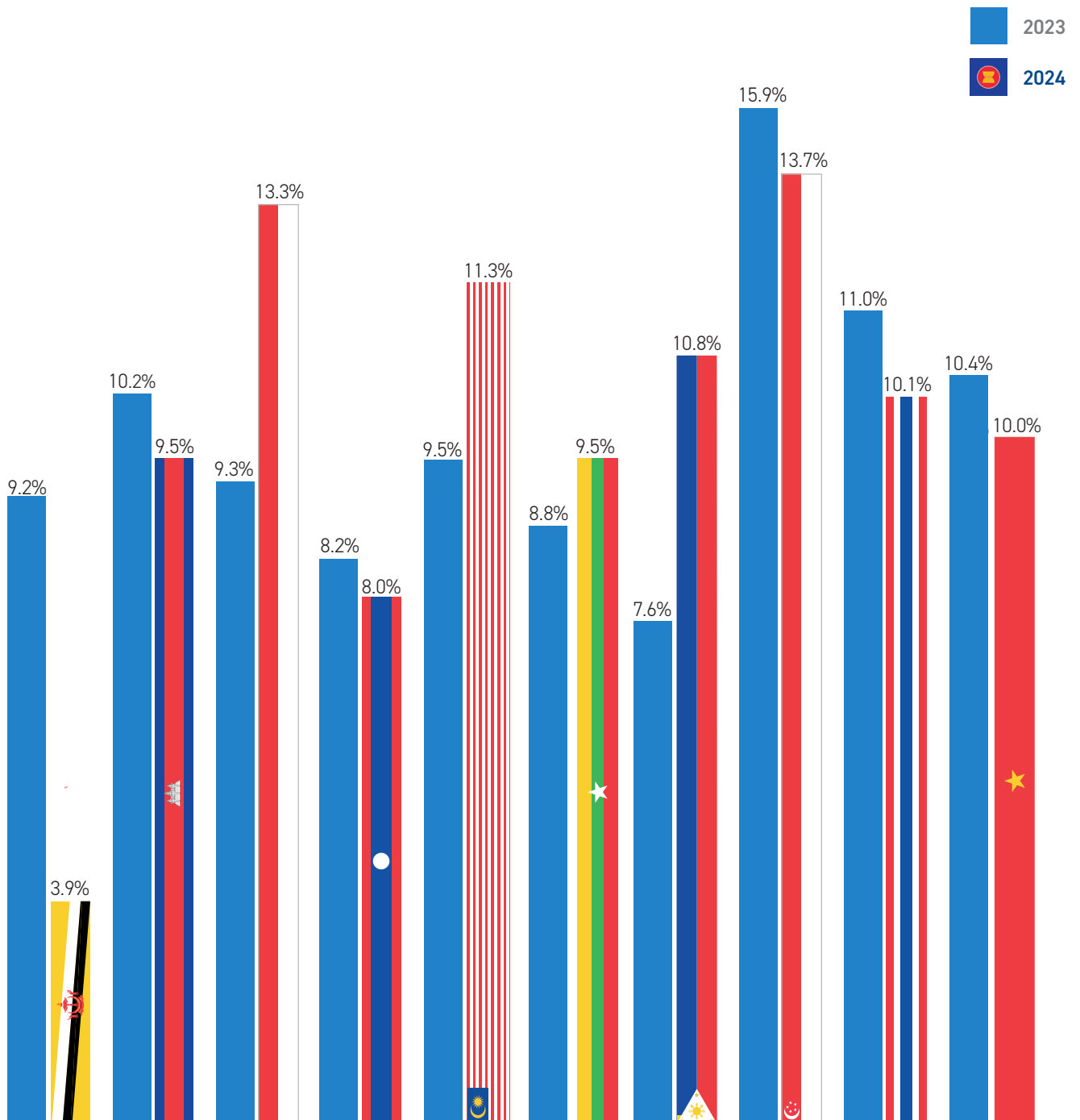
06 - 10

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

NATIONALITY

A total of 1,994 respondents from ten ASEAN member states participated in this survey. Singapore led with the highest number of respondents at 273 (13.7%), followed by Indonesia at 265 (13.3%) and Malaysia at 225 (11.3%). The breakdown for the rest of the countries are as follows: The Philippines (10.8%), Thailand (10.1%), Vietnam (10.0%), Cambodia and Myanmar (both at 9.5%), Laos (8.0%), and Brunei (3.9%).

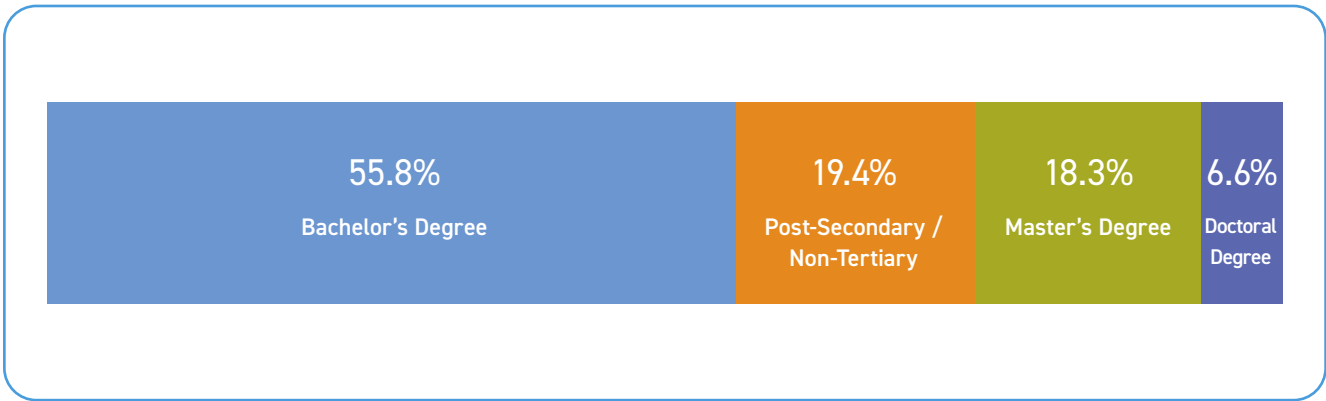
Q1 What is your nationality?



EDUCATION

A majority of respondents (55.8%) hold a Bachelor's degree, followed by 19.4% with post-secondary/non-tertiary qualification and another 18.3% with Master's level attainment. The smallest group are those with a Doctoral degree at 6.6%. The country with the highest numbers of Bachelor's degree qualifications is the Philippines (70.2%) whereas the country with the

most numbers of respondents with a Doctoral degree is Brunei (23.4%). Singapore respondents have the highest numbers of Master's degree holders (32.6%) whereas the highest number of post-secondary/non-tertiary education respondents come from Myanmar (56.1%).

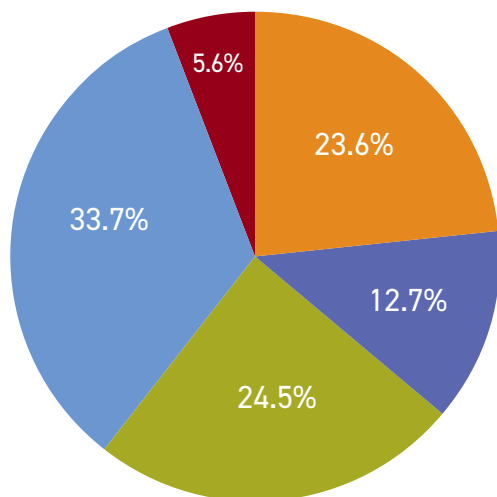


Q2 What is the highest education level that you have attained?

Country	Post-Secondary / Non-Tertiary	Bachelor's Degree	Master's Degree	Doctoral Degree
ASEAN	19.4%	55.8%	18.3%	6.6%
BN	9.1%	41.6%	26.0%	23.4%
KH	23.3%	68.3%	7.4%	1.1%
ID	6.4%	69.8%	19.2%	4.5%
LA	26.9%	65.0%	6.9%	1.3%
MY	16.0%	51.6%	23.6%	8.9%
MM	56.1%	19.6%	18.0%	6.3%
PH	12.1%	70.2%	14.9%	2.8%
SG	21.6%	34.8%	32.6%	11.0%
TH	12.9%	61.2%	15.4%	10.4%
VN	11.5%	70.0%	14.5%	4.0%

AFFILIATION

The largest affiliation group is from the private sector (33.7%), followed by government (24.5%), and academia, think-tanks or research institutions (23.6%). Civil society, non-government organisations, or media was presented by 12.7% of respondents. The smallest representation came from respondents affiliated with regional or international organisations (5.6%).



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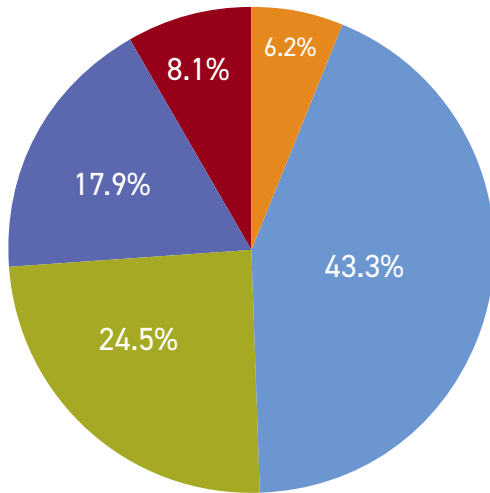
Q3 What is your affiliation?

Country	Academia, Think-Tanks, or Research Institutions	Civil Society, Non-Government Organisations, or Media	Government	Private Sector (Business or Finance)	Regional or International Organisations
ASEAN	23.6%	12.7%	24.5%	33.7%	5.6%
BN	27.3%	11.7%	32.5%	22.1%	6.5%
KH	32.8%	17.5%	15.9%	28.6%	5.3%
ID	30.2%	17.0%	26.0%	21.5%	5.3%
LA	16.3%	9.4%	28.1%	44.4%	1.9%
MY	22.2%	10.7%	29.8%	31.6%	5.8%
MM	5.8%	13.2%	19.0%	58.7%	3.2%
PH	25.1%	14.0%	30.7%	26.0%	4.2%
SG	24.2%	12.5%	23.8%	29.3%	10.3%
TH	24.4%	4.5%	28.9%	35.8%	6.5%
VN	25.5%	14.5%	13.5%	41.5%	5.0%

AGE

There was minimal change in terms of age distribution with the largest age group being the 22-35 years old (43.3%). This is followed by the 36-45 years old group (24.5%). These two groups are the most economically productive and intellectually engaged age groups in Southeast Asia.

The third largest group is aged between 46-60 years old (17.9%), followed by those aged above 60 years old (8.1%) and lastly, those between 18 to 21 years old (6.2%).



Q4 Which age group do you belong to?

Country	18-21	22-35	36-45	46-60	Above 60
ASEAN	6.2%	43.3%	24.5%	17.9%	8.1%
BN	6.5%	42.9%	32.5%	16.9%	1.3%
KH	20.1%	59.3%	17.5%	2.1%	1.1%
ID	2.6%	50.2%	23.4%	18.1%	5.7%
LA	10.6%	60.6%	21.3%	6.9%	0.6%
MY	2.7%	38.7%	24.0%	21.8%	12.9%
MM	5.3%	44.4%	27.5%	14.8%	7.9%
PH	7.4%	37.7%	20.9%	21.4%	12.6%
SG	3.7%	23.8%	20.1%	33.3%	19.0%
TH	1.0%	38.3%	32.3%	22.9%	5.5%
VN	6.5%	47.5%	31.5%	10.5%	4.0%

Regional Outlook and Views on International Developments

11 - 32

This section examines the key challenges and main preoccupations. Weighting is applied from this section onwards.

TOP THREE CHALLENGES FACING SOUTHEAST ASIA

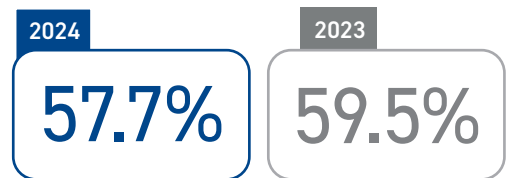
The region continues to express fears of bleak economic prospects with the global economy in the state that it is. A majority of Southeast Asians (57.7%) fear unemployment and economic recession. The Israel-Hamas conflict in October 2023 and the subsequent Houthi attacks in the Red Sea may be geographically far away but the impacts are felt through supply chain disruptions which may directly impact energy and food prices. China's economic slow-down may have also driven such concerns. At the country level, Brunei (77.9%), Cambodia (68.3%), and Vietnam (67.5%) are particularly concerned. Singapore is an outlier with only 27.8% of the respondents expressing such fears.

The second-ranked challenge is more frequent and intense weather events as expressed by 53.4% of Southeast Asians. Vietnam respondents (75.0%) overtook the Philippines as the country most concerned with climate change. Vietnam experienced over 1,100 climate disasters last year with record-breaking temperatures exceeding 44 degrees Celsius. Climate change takes the top spot in Singapore (64.8%), Indonesia (58.9%), and Thailand (55.7%).

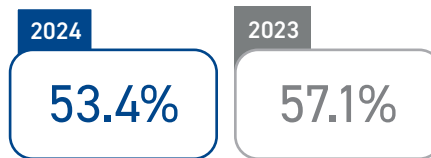
47.0% of regional respondents picked intensifying economic tensions between major powers as their third-ranked challenge. This is especially pertinent for Laos (70.0%) who picked this as their top-ranked concern, and Cambodia whose two top challenges are tied (68.3%).

Widening socio-economic gaps and rising income disparity are ranked fourth (44.4%) followed by increased military tensions arising from potential flashpoints in the South China Sea, Taiwan Strait, and Korean Peninsula in fifth place. For the Philippines (64.7%), increased military tensions arising from potential flashpoints in the South China Sea overtook climate change as its top concern this year. With income inequality becoming more acute post-Covid, it is no surprise that countries like Thailand (53.7%) ranked rising income disparity as its second-ranked concern as it has one of the highest income inequality in the world, with the richest 10% of Thais earning over half of the total national income while the bottom half of the population earns about 10% of total income.

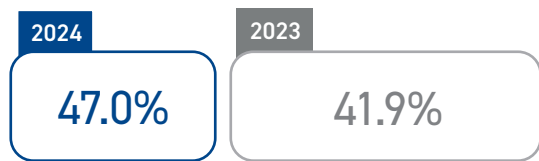
At the country level, Myanmar continues to feel most acutely the impacts of its domestic political instability at 70.9%.



Unemployment and economic recession



Climate change and more extreme weather events



Intensifying economic tensions between major powers

Widening socio-economic gaps and rising income disparity

Increased military tensions arising from potential flashpoints



Q5 What are the top 3 challenges facing Southeast Asia? (Check 3 responses)

2024								
Country	Intensifying economic tensions between major powers	Unemployment and economic recession	Domestic political instability (including ethnic and religious tensions)	Terrorism and extremism	Increased military tensions arising from potential flashpoints (i.e. South China Sea, Taiwan Strait, Korean Peninsula)	Climate change and more extreme weather events (droughts, floods, cyclones, rising sea levels, etc.)	Widening socio-economic gaps and rising income inequality	Deteriorating human rights conditions
ASEAN	47.0%	57.7%	36.8%	10.0%	38.0%	53.4%	44.4%	12.8%
BN	36.4%	77.9%	26.0%	3.9%	28.6%	64.9%	54.5%	7.8%
KH	68.3%	68.3%	25.4%	7.4%	28.0%	43.4%	35.4%	23.8%
ID	32.5%	57.4%	42.3%	10.9%	36.6%	58.9%	47.9%	13.6%
LA	70.0%	66.9%	35.6%	9.4%	20.0%	35.6%	52.5%	10.0%
MY	39.6%	52.9%	51.1%	7.6%	40.4%	49.8%	48.9%	9.8%
MM	37.0%	51.3%	70.9%	18.5%	31.7%	23.8%	31.7%	34.9%
PH	46.0%	57.7%	14.9%	11.2%	64.7%	61.9%	34.4%	9.3%
SG	52.7%	27.8%	36.3%	15.8%	57.5%	64.8%	42.5%	2.6%
TH	52.7%	49.3%	44.3%	9.5%	21.4%	55.7%	53.7%	13.4%
VN	34.5%	67.5%	21.0%	5.5%	51.5%	75.0%	42.0%	3.0%

2023								
Country	US-China decoupling	Unemployment and economic recession	Domestic political instability (including ethnic and religious tensions)	Terrorism and extremism	Increased military tensions arising from potential flashpoints (i.e. South China Sea, Taiwan Strait, Korean Peninsula)	Climate change and more extreme weather events (droughts, floods, cyclones, rising sea levels, etc.)	Widening socio-economic gaps and rising income inequality	Deteriorating human rights conditions
ASEAN	36.2%	59.5%	35.6%	11.3%	41.9%	57.1%	41.9%	16.5%
BN	23.3%	49.2%	33.3%	10.8%	75.0%	74.2%	25.8%	8.3%
KH	38.8%	69.4%	14.9%	0.7%	41.0%	52.2%	61.9%	20.9%
ID	30.6%	70.2%	38.0%	15.7%	31.4%	60.3%	36.4%	17.4%
LA	47.7%	61.7%	47.7%	11.2%	38.3%	50.5%	19.6%	23.4%
MY	35.5%	63.7%	50.8%	4.8%	25.8%	61.3%	47.6%	10.5%
MM	20.9%	59.1%	51.3%	41.7%	18.3%	29.6%	47.0%	32.2%
PH	25.3%	60.6%	20.2%	12.1%	50.5%	76.8%	38.4%	16.2%
SG	58.2%	45.2%	31.7%	4.8%	45.2%	60.1%	49.0%	5.8%
TH	38.2%	62.5%	37.5%	9.7%	27.8%	41.7%	59.0%	23.6%
VN	44.1%	53.7%	30.1%	1.5%	64.7%	64.7%	34.6%	6.6%

TOP THREE CONCERNS ABOUT ASEAN

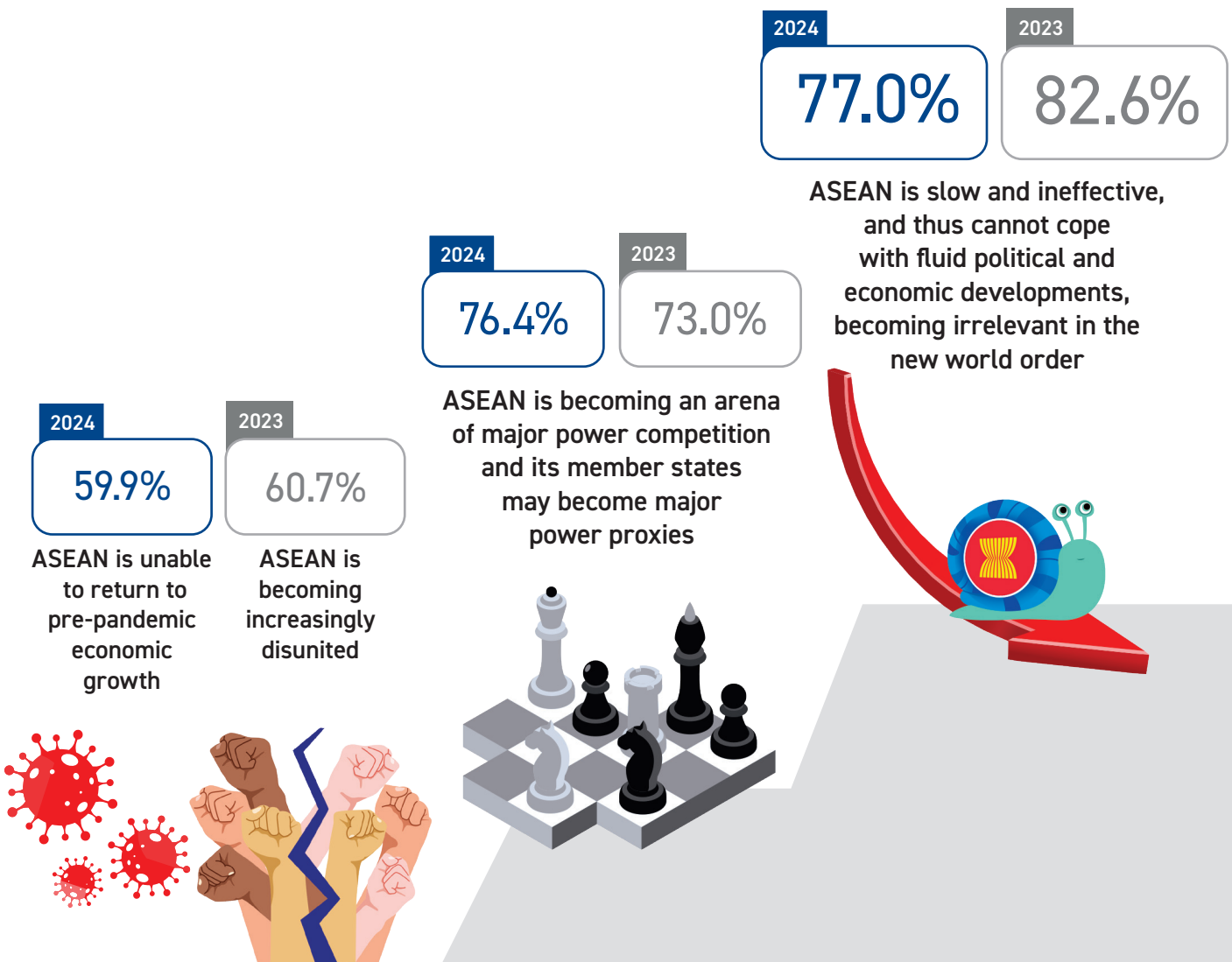
The region continues to be concerned about a “slow and ineffective” ASEAN that is unable to cope with fluid political and economic developments, albeit dropping from 82.6% last year to 77.0% this year. The sense that ASEAN is always caught on its backfoot and thus risks irrelevance in the international order is felt most acutely by five countries in ASEAN: Indonesia (86.4%), Myanmar (84.1%), Brunei (81.8%), Malaysia (81.3%), and Thailand (76.6%).

The second top concern is the fear of ASEAN becoming an arena of major power competition and that its member states may become major power proxies by a very tight margin of 76.4% of regional respondents. The other five ASEAN member states – Vietnam (84.5%), the Philippines (83.7%), Cambodia (82.0%), Singapore (81.7%), and Laos (76.3%) – chose this as their top concern for ASEAN. Interestingly, Laos being this year’s ASEAN Chair may feel the need to defend against such pressures jumping drastically from 40.2% in 2023 to 76.3% in 2024.

With a sense of economic malaise still prevalent in the region, 59.9% of the respondents fear that ASEAN may not be able to return to its pre-pandemic economic growth. This is an increase from 37.2% last year. This may pose challenges to ASEAN achieving the status of the world’s 4th largest economy by 2030.

Perceptions of ASEAN disunity was not as bad this year, dropping from 60.7% in 2023 to 51.6% as the grouping managed to display a façade of unity over Myanmar, Russia-Ukraine, and the Israel-Hamas conflict. Successive leaders’ statements appear cognisant of some differences but in general, were able to land in a comfortable zone of calling for adherence to international law.

Fears of ASEAN elitism ranked last, dropping from 46.6% in 2023 to 35.1% as other more important issues threatening ASEAN’s survival take centre stage.



Q6 What are your top 3 concerns about ASEAN? (Check 3 responses)

2024					
Country	ASEAN is unable to return to pre-pandemic economic growth	ASEAN is becoming increasingly disunited	ASEAN is elitist and disconnected from ordinary people	ASEAN is slow and ineffective, and thus cannot cope with fluid political and economic developments, becoming irrelevant in the new world order	ASEAN is becoming an arena of major power competition and its member states may become major power proxies
ASEAN	59.9%	51.6%	35.1%	77.0%	76.4%
BN	42.9%	44.2%	55.8%	81.8%	75.3%
KH	76.7%	33.9%	29.1%	78.3%	82.0%
ID	53.2%	38.9%	50.9%	86.4%	70.6%
LA	71.9%	51.3%	39.4%	61.3%	76.3%
MY	60.0%	54.2%	34.7%	81.3%	69.8%
MM	41.3%	61.4%	44.4%	84.1%	68.8%
PH	60.9%	54.0%	34.0%	67.4%	83.7%
SG	55.7%	67.4%	20.9%	74.4%	81.7%
TH	64.2%	61.7%	26.4%	76.6%	71.1%
VN	72.5%	49.5%	15.0%	78.5%	84.5%

2023					
Country	ASEAN is unable to recover from the pandemic	ASEAN is becoming increasingly disunited	ASEAN is elitist and disconnected from ordinary people	ASEAN is slow and ineffective, and thus cannot cope with fluid political and economic developments, becoming irrelevant in the new world order	ASEAN is becoming an arena of major power competition and its member states may become major power proxies
ASEAN	37.2%	60.7%	46.6%	82.6%	73.0%
BN	51.7%	42.5%	37.5%	88.3%	80.0%
KH	40.3%	59.7%	44.8%	70.9%	84.3%
ID	25.6%	54.5%	59.5%	86.8%	73.6%
LA	59.8%	63.6%	66.4%	70.1%	40.2%
MY	33.1%	60.5%	53.2%	80.6%	72.6%
MM	35.7%	72.2%	59.1%	77.4%	55.7%
PH	41.4%	57.6%	39.4%	84.8%	76.8%
SG	25.0%	70.2%	31.7%	89.9%	83.2%
TH	34.7%	56.9%	51.4%	84.0%	72.9%
VN	24.3%	69.1%	22.8%	93.4%	90.4%

TOP THREE GEOPOLITICAL CONCERNS

The October 7 attacks by Hamas on Israeli civilians and the ensuing humanitarian crisis in Gaza occupies the region's mindshare (46.5%). The second-ranked concern is aggressive behaviour in the South China Sea (39.9%), followed by concerns over the two-year long Russia-Ukraine war and global scam operations (39.4%) tied at third place. International drug smuggling operations came in at a close fourth place (37.2%) followed by concerns over the change of political leadership in the region (33.9%). Implications arising from the January 2024 Taiwan elections ranked last in the list of geopolitical concerns at 7.6%, right after the worries over the DPRK's continued ballistic tests (10.6%).

At the country level, it is no surprise that the Muslim-majority countries in Southeast Asia ranked the Israel-Hamas conflict as their top geopolitical concern – Malaysia (83.1%), Brunei (79.2%), and Indonesia (74.7%). Singapore also ranked the Israel-Hamas conflict as its top concern at 57.9%.

The Russia-Ukraine war continues to be the top concern for Laos and Cambodia at 61.9% and 57.7% respectively, whereas global scam operations are Thailand's top concern (58.2%).

Aggressive behaviour in the South China Sea is the Philippines' (90.2%) and Vietnam's (72.5%) top concern, the region's two frontline South China Sea claimant states. Although Brunei and Malaysia are also claimant states, not

being at the frontlines of managing China's actions mean that for them, aggressive behaviour in the area is ranked second place.

Unsurprisingly, Myanmar is most concerned about its own troubles at 89.9% with little mindshare for other issues elsewhere.



46.5%
Israel-Hamas conflict



39.9%
Aggressive behaviour in the South China Sea



39.4%
Russia-Ukraine War



39.4%
Global scam operations

Q7 Which of the following current geopolitical events are the top concerns for the government in your country? (Check 3 responses)

Country	Russia-Ukraine War	Israel-Hamas conflict	2024 US presidential elections	Implications arising from 2024 Taiwan elections	Aggressive behaviour in the South China Sea	Myanmar crisis	DPRK's cont'd ballistic missile testing	Global scam operations	Int'l drug smuggling	Change of political leadership in the region
ASEAN	39.4%	46.5%	18.8%	7.6%	39.9%	26.6%	10.6%	39.4%	37.2%	33.9%
BN	18.2%	79.2%	22.1%	5.2%	50.6%	26.0%	7.8%	35.1%	20.8%	35.1%
KH	57.7%	41.8%	21.2%	5.3%	17.5%	16.9%	13.2%	34.9%	51.9%	39.7%
ID	36.6%	74.7%	9.8%	3.0%	43.0%	27.9%	10.6%	23.0%	35.5%	35.8%
LA	61.9%	32.5%	10.6%	6.3%	9.4%	11.9%	18.8%	51.9%	55.6%	41.3%
MY	24.9%	83.1%	4.9%	4.9%	47.6%	24.0%	4.9%	43.6%	20.0%	42.2%
MM	36.0%	12.7%	16.4%	4.8%	10.1%	89.9%	4.2%	38.1%	44.4%	43.4%
PH	23.7%	24.2%	12.1%	12.6%	90.2%	2.3%	10.2%	36.3%	55.8%	32.6%
SG	30.0%	57.9%	42.1%	19.4%	44.3%	12.1%	6.6%	43.6%	12.1%	31.9%
TH	38.3%	36.8%	10.4%	7.0%	13.9%	41.3%	14.4%	58.2%	53.2%	26.4%
VN	67.0%	22.0%	38.0%	8.0%	72.5%	14.0%	15.5%	29.5%	22.5%	11.0%

ASEAN'S FIVE-POINT CONSENSUS ON MYANMAR

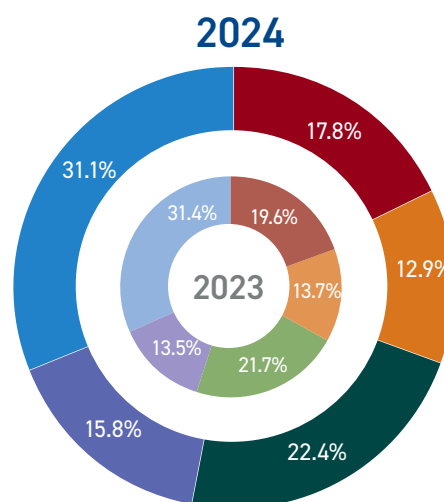
The situation in Myanmar continues to trouble ASEAN. With only the Five-Point Consensus (5PC) that was agreed by all ten ASEAN members in April 2021 to work on, the grouping has muddled through the last three years. Similar to 2023, the largest proportion of respondents remained agnostic about the efficacy of the 5PC at 31.1%. With the exception of Myanmar and Thailand, all the other eight ASEAN countries hold neutral views of the 5PC.

Despite having been the immediate past ASEAN Chair that was most actively engaged on the issue of Myanmar, Indonesia has shifted from pinning the failure of the 5PC to the intransigence of the junta, declining from 28.1% in 2023 to 19.6% in 2024, to a more neutral view of the consensus document, increasing from 23.1% in 2023 to 35.1% this year. Indonesia's change in stance may be indicative of a realisation of how complex the issues in the Myanmar conflict are based on its experience.

At the regional level, the sense that the 5PC will not work with the intransigence of the State Administration Council (Junta) continues to hold sway at 22.4% while a third group holds the view that it is fundamentally flawed in addressing complex issues to begin with (17.8%). Myanmar respondents squarely point to the SAC's intransigence for ASEAN's failure at 41.8% though another 20.1% appear to think that the strategy was flawed from the beginning.

Of those who think that the 5PC remains the most suitable under present circumstances (15.8%), only Cambodia seems to hold more strongly to this view at 25.9%.

On the other hand, Thailand holds the view that the 5PC has served to expose ASEAN disunity at 25.4%, double the regional average of 12.9%. It is worth noting that Thailand was active in organising the Track 1.5 meetings involving China, Bangladesh, India, Myanmar, and Laos in 2023 under the Prayuth Chan O-Cha government.



Q8 Choose the statement that best reflects your view about ASEAN's Five-Point Consensus (5PC) on Myanmar:

Country	The 5PC is fundamentally flawed in addressing complex issues		The 5PC exposes ASEAN disunity		The 5PC will not work with the intransigence of the State Administration Council (Junta)		The 5PC is the most suitable option under these circumstances		I am neutral about the 5PC	
	2023	2024	2023	2024	2023	2024	2023	2024	2023	2024
ASEAN	19.6%	17.8%	13.7%	12.9%	21.7%	22.4%	13.5%	15.8%	31.4%	31.1%
BN	11.7%	15.6%	10.8%	9.1%	17.5%	23.4%	11.7%	7.8%	48.3%	44.2%
KH	4.5%	20.1%	3.0%	8.5%	9.7%	16.4%	26.9%	25.9%	56.0%	29.1%
ID	24.0%	17.7%	6.6%	9.1%	28.1%	19.6%	18.2%	18.5%	23.1%	35.1%
LA	11.2%	13.8%	10.3%	15.6%	8.4%	12.5%	8.4%	20.0%	61.7%	38.1%
MY	16.9%	18.7%	16.1%	13.8%	26.6%	21.3%	11.3%	11.6%	29.0%	34.7%
MM	35.7%	20.1%	29.6%	10.1%	16.5%	41.8%	9.6%	10.1%	8.7%	18.0%
PH	22.2%	23.3%	11.1%	12.1%	23.2%	14.9%	15.2%	17.7%	28.3%	32.1%
SG	14.4%	14.7%	8.7%	12.1%	41.8%	29.3%	11.1%	10.6%	24.0%	33.3%
TH	27.1%	15.9%	23.6%	25.4%	26.4%	23.4%	6.3%	15.9%	16.7%	19.4%
VN	28.7%	18.5%	17.6%	13.0%	18.4%	21.5%	16.9%	20.0%	18.4%	27.0%

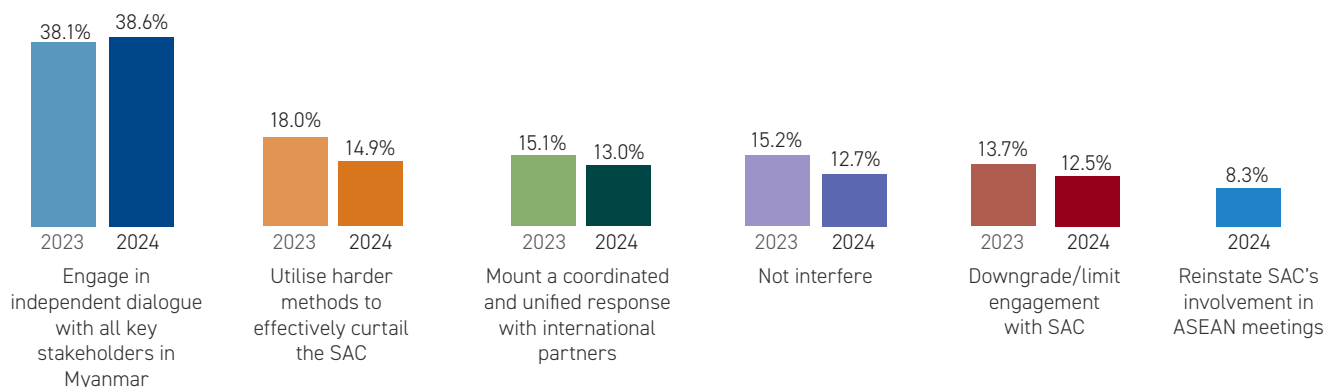
MOVING THE MYANMAR ISSUE FORWARD

Independent dialogue with all key stakeholders, including with the National Unity Government and other entities, continues to be the region's most favoured approach at 38.6%. It is unanimously the top choice of all ten countries, including Myanmar. The second approach, if the region had to choose, would be to utilise harder methods to increase the costs of non-compliance for the military junta at 14.9%. But the popularity of this choice has dropped by three percentage points compared to 2023. This may perhaps be indicative that the situation has evolved quite significantly since Operation 1027 whereby the junta's control is now questionable.

The least popular option which is to reinstate the SAC's involvement in ASEAN meetings to continue pushing for 5PC implementation (8.3%) had its strongest support from

Cambodia at double the regional average (16.4%). Laos who is ASEAN Chair this year gave this option the lowest rating (3.8%) among all the options. Equally unattractive options include mounting a coordinated response with international partners (13.0%), non-interference in Myanmar's domestic politics (12.7%), and downgrading/limiting engagement with the SAC until the situation improves (12.5%).

In many ways the region's responses show that there is a greater appreciation of the multiple layers of complexities surrounding the Myanmar conflict, including the increasingly visible involvement of the Peoples' Defense Force, the many ethnic armed organisations, and the demands of the Myanmar diaspora.



Q9 To move the Myanmar issue forward, ASEAN should:

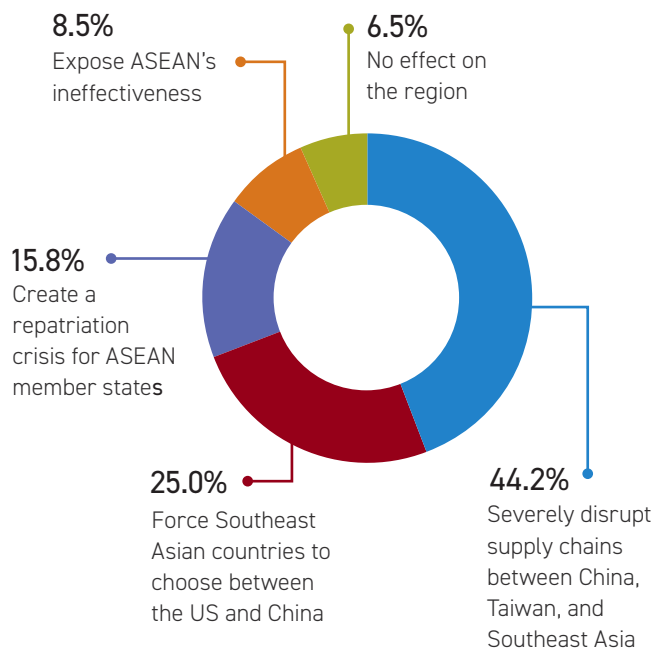
Country	Downgrade/limit engagement with SAC until the situation in Myanmar improves towards political stability and a willingness to respond to ASEAN's regional diplomacy		Engage in independent dialogue with all key stakeholders, including the National Unity Government, in Myanmar to build trust		Mount a coordinated and unified response with international partners		Not interfere in Myanmar's domestic politics		Utilise harder methods (e.g., suspension, targeted sanctions) to increase the costs for SAC of its non-compliance with the 5PC		Reinstate SAC's involvement in ASEAN meetings to continue pushing for 5PC implementation
	2023	2024	2023	2024	2023	2024	2023	2024	2023	2024	2024
ASEAN	13.7%	12.5%	38.1%	38.6%	15.1%	13.0%	15.2%	12.7%	18.0%	14.9%	8.3%
BN	22.5%	16.9%	34.2%	31.2%	15.0%	7.8%	5.0%	11.7%	23.3%	20.8%	11.7%
KH	13.4%	13.2%	17.2%	40.2%	9.0%	10.6%	47.0%	11.6%	13.4%	7.9%	16.4%
ID	9.9%	11.3%	50.4%	44.2%	12.4%	7.2%	3.3%	6.8%	24.0%	24.5%	6.0%
LA	2.8%	11.3%	40.2%	43.8%	12.1%	9.4%	43.0%	25.0%	1.9%	6.9%	3.8%
MY	16.1%	13.3%	41.1%	38.2%	15.3%	14.2%	7.3%	8.9%	20.2%	17.3%	8.0%
MM	7.8%	6.3%	36.5%	43.9%	18.3%	16.4%	21.7%	13.8%	15.7%	10.1%	9.5%
PH	15.2%	14.4%	41.4%	43.3%	18.2%	20.5%	4.0%	7.0%	21.2%	7.4%	7.4%
SG	18.8%	16.5%	34.6%	28.9%	19.7%	17.2%	6.7%	15.0%	20.2%	18.3%	4.0%
TH	20.1%	16.4%	34.7%	36.3%	18.1%	10.0%	5.6%	12.9%	21.5%	19.9%	4.5%
VN	10.3%	5.5%	50.7%	36.0%	12.5%	16.5%	8.1%	14.5%	18.4%	16.0%	11.5%

THE OUTBREAK OF HOSTILITIES IN TAIWAN STRAIT

Southeast Asians recognise that any hostilities in the Taiwan Strait would have significant implications for the region, given the geographical proximity and economic ties with both China and Taiwan. Economic interest prevails, with the largest group of respondents (44.2%) expressing concern that such a conflict scenario would severely disrupt supply chains between China, Taiwan, and Southeast Asia. This sentiment is particularly pronounced in Vietnam, where 59.0% of respondents share this concern.

The second largest group of respondents (25.0%) fear that regional countries would be forced to choose between the US and China, with Singapore (37.7%) and Thailand (32.3%) expressing the highest levels of concern.

A smaller percentage of respondents (15.8%) believe that a conflict in the Taiwan Strait would create a repatriation crisis for ASEAN member states, considering the presence of over 700,000 Southeast Asian migrant workers on the island. This concern is particularly notable among respondents from the Philippines (28.8%) and Indonesia (24.2%) – two of the largest sources of migrant workers based in Taiwan. A minority of respondents (8.5%) are worried about ASEAN's ineffectiveness in handling such a crisis, with Myanmar expressing the highest level of concern at 22.2%. The smallest group of respondents (6.5%) deny any potential effect on the region, with Laos respondents constituting the majority at 23.1%.

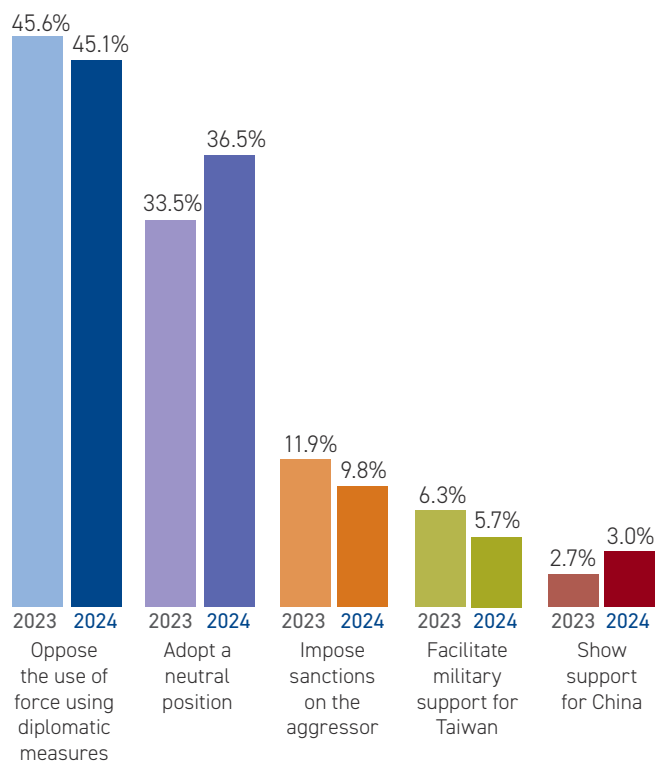


Q10 How would the outbreak of hostilities in the Taiwan Strait affect the region?

Country	Create a repatriation crisis for ASEAN member states	Expose ASEAN's ineffectiveness	Force Southeast Asian countries to choose between the US and China	Severely disrupt supply chains between China, Taiwan, and Southeast Asia	No effect on the region
ASEAN	15.8%	8.5%	25.0%	44.2%	6.5%
BN	9.1%	10.4%	27.3%	45.5%	7.8%
KH	16.9%	6.3%	26.5%	47.1%	3.2%
ID	24.2%	8.7%	15.8%	47.2%	4.2%
LA	18.8%	8.1%	24.4%	25.6%	23.1%
MY	16.4%	8.0%	20.9%	48.4%	6.2%
MM	9.0%	22.2%	29.6%	31.2%	7.9%
PH	28.8%	8.8%	18.6%	39.5%	4.2%
SG	5.1%	3.7%	37.7%	50.5%	2.9%
TH	11.4%	4.5%	32.3%	48.3%	3.5%
VN	18.5%	4.0%	17.0%	59.0%	1.5%

RESPONSE TOWARDS CONFLICT IN TAIWAN STRAIT

In the event of a conflict in the Taiwan Strait, most respondents (45.1%) advocate for the non-use of force and the pursuit of diplomatic measures instead. This preference is the top choice for most of ASEAN member states, with Vietnam registering the highest support at 60.0% while Laos and Thailand stand out for their preference to adopt a neutral position. Similar to last year's findings, over a third of the respondents (36.5%) express a desire to maintain a neutral stance. There is limited support in the region for imposing sanctions on the aggressor (9.8%), facilitating military support for Taiwan (5.7%), or showing explicit support for China (3.0%).



At the country level, the Philippines which has been strengthening its alliance with the US, demonstrates the highest percentage (14.9%) in favour of facilitating military support for Taiwan. This aligns with the Philippines' recent expansion of the Enhanced Defence Cooperation Agreement (EDCA) with the US, granting access to four additional bases, three of which face Taiwan. Surprisingly, Cambodia leads among countries wanting to impose sanctions on the aggressor, with 17.5% of the respondents expressing support for this approach. On the other hand, Laos (8.1%) and Brunei (7.8%) emerge as the top two countries showing support for China.

Q11 What should your country do if conflict breaks out in the Taiwan Strait?

Country	Oppose the use of force using diplomatic measures		Adopt a neutral position		Impose sanctions on the aggressor		Facilitate military support for Taiwan		Show support for China	
	2023	2024	2023	2024	2023	2024	2023	2024	2023	2024
ASEAN	45.6%	45.1%	33.5%	36.5%	11.9%	9.8%	6.3%	5.7%	2.7%	3.0%
BN	21.7%	42.9%	52.5%	37.7%	12.5%	3.9%	12.5%	7.8%	0.8%	7.8%
KH	23.1%	35.4%	56.0%	35.4%	9.0%	17.5%	3.0%	10.6%	9.0%	1.1%
ID	66.1%	59.2%	22.3%	27.2%	9.1%	9.4%	2.5%	1.9%	0.0%	2.3%
LA	15.9%	26.9%	59.8%	56.3%	12.1%	8.8%	5.6%	0.0%	6.5%	8.1%
MY	52.4%	50.7%	29.0%	35.1%	12.1%	6.7%	4.0%	3.6%	2.4%	4.0%
MM	54.8%	50.8%	19.1%	27.0%	18.3%	14.3%	4.3%	5.3%	3.5%	2.6%
PH	54.5%	44.2%	13.1%	26.5%	12.1%	13.5%	20.2%	14.9%	0.0%	0.9%
SG	58.2%	49.8%	24.0%	37.4%	11.1%	6.2%	2.9%	5.9%	3.8%	0.7%
TH	48.6%	31.3%	31.9%	55.2%	14.6%	9.0%	4.2%	4.0%	0.7%	0.5%
VN	61.0%	60.0%	27.2%	27.0%	8.1%	8.5%	3.7%	3.0%	0.0%	1.5%

TIMOR-LESTE'S ADMISSION INTO ASEAN

In November 2022, after more than a decade of deliberations, ASEAN leaders finally reached a consensus to admit Timor-Leste as the 11th member of ASEAN and grant it observer status to attend all meetings. The decision was positively welcomed by regional respondents in the 2023 survey report.

This year, Southeast Asians continue to express optimism about Timor-Leste's membership, with 36.9% of the respondents believing that it would enhance ASEAN's unity and centrality. This sentiment is particularly strong among the respondents in Vietnam (65.0%), Cambodia (49.7%), and Laos (45.0%) – the newer members of ASEAN.

The second largest group of respondents (27.3%) believe that including Timor-Leste in ASEAN would boost intra-regional trade and investment, a sentiment most pronounced among Malaysian respondents. A fifth of respondents (19.6%) believe that Timor-Leste's membership will not change anything in ASEAN. This perspective is primarily held by respondents from Indonesia (34.3%), Brunei (32.5%), and Singapore (26.4%). There are smaller percentages of respondents expressing less optimistic views, such as concerns about Timor-Leste complicating ASEAN's consensus-based decision-making process (6.8%), slowing down ASEAN's economic integration (5.8%), and increasing disunity among ASEAN member states (3.6%).

Singapore respondents, in particular, exhibit the least optimism, with a significant proportion believing that Timor-Leste will complicate decision-making (18.3%) and hinder ASEAN's economic integration (15.4%).



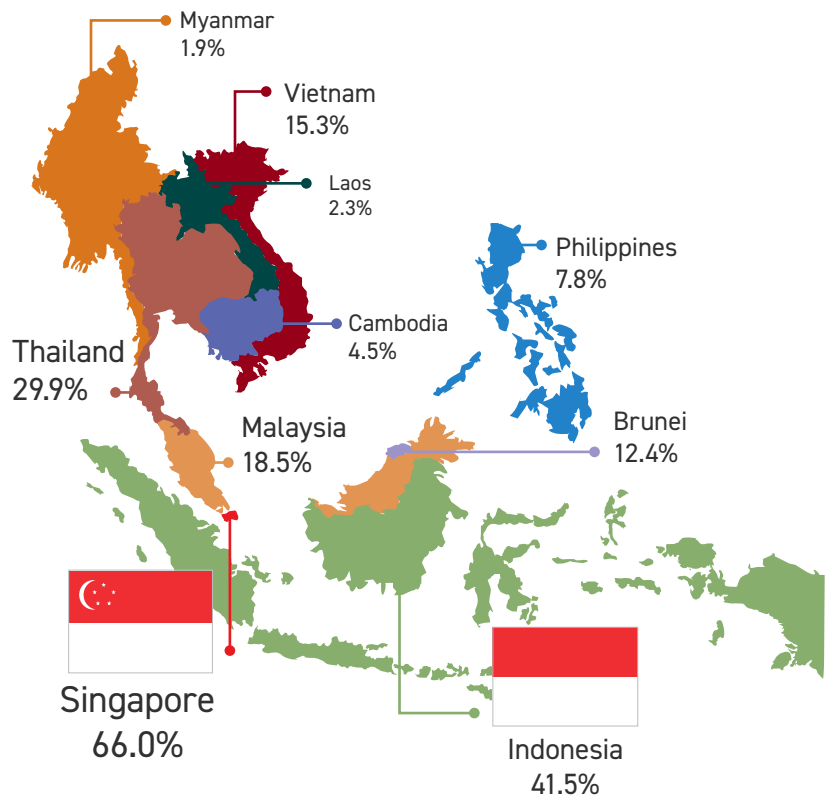
Q12 In my opinion, the admission of Timor-Leste into ASEAN will:

Country	Complicate the consensus-based decision-making process	Enhance ASEAN's unity and centrality	Increase disunity among ASEAN member states	Increase intra-regional trade and investment	Slow down ASEAN's economic integration	Not change anything in ASEAN
ASEAN	6.8%	36.9%	3.6%	27.3%	5.8%	19.6%
BN	6.5%	22.1%	1.3%	29.9%	7.8%	32.5%
KH	3.2%	49.7%	3.7%	31.7%	3.7%	7.9%
ID	4.2%	29.8%	2.6%	21.9%	7.2%	34.3%
LA	3.1%	45.0%	5.6%	32.5%	1.9%	11.9%
MY	11.1%	26.2%	4.4%	28.0%	7.1%	23.1%
MM	4.8%	38.1%	8.5%	24.9%	1.1%	22.8%
PH	5.6%	41.9%	2.3%	33.5%	5.6%	11.2%
SG	18.3%	12.1%	1.8%	26.0%	15.4%	26.4%
TH	7.5%	38.8%	5.0%	25.9%	4.0%	18.9%
VN	3.5%	65.0%	1.0%	19.0%	4.0%	7.5%

MEMBER STATES' CONTRIBUTION TO ASEAN'S DEVELOPMENT

Two of the original founding ASEAN members – Singapore and Indonesia – are acknowledged as having made the biggest contribution to ASEAN's long-term development and progress. Singapore is the front-runner holding 66.0% of the region's votes while Indonesia stands at 41.5%. Apart from Indonesia and Vietnam respondents who voted for their own countries as ASEAN's leader, the rest of the ASEAN members voted for Singapore as their top choice. Singapore is Indonesia's and Vietnam's second-ranked country at 61.9% and 55.5% respectively.

Indonesia is the second-ranked choice for four countries – Singapore (63.4%), Malaysia (54.7%), Brunei (50.6%), and Cambodia (34.9%) whereas Thailand was second-ranked for two of its immediate neighbours – Myanmar (40.7%) and Laos (39.4%). For Laos, first place regional leadership may belong to Singapore but second-place regional leadership position is a toss-up between Thailand at 39.4% and Vietnam at 31.9%.



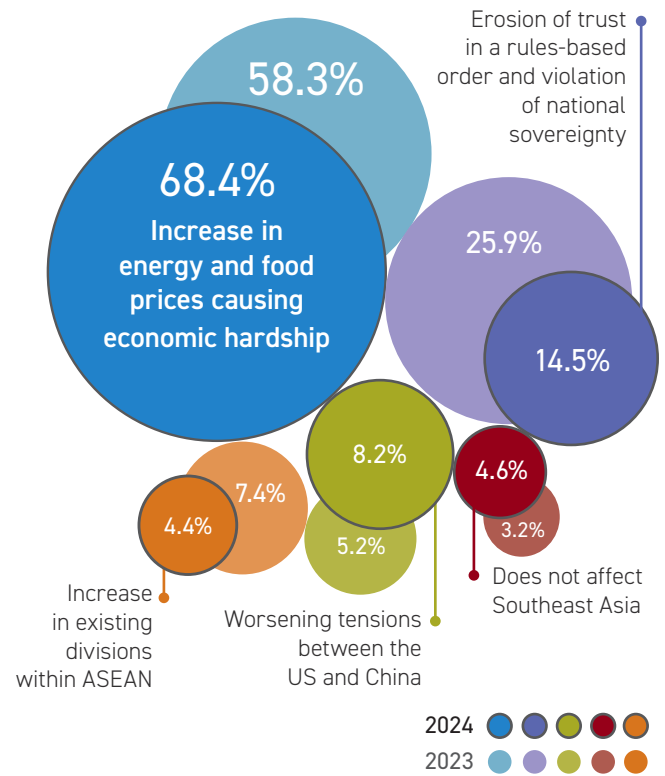
Q13 Which members have made the biggest contribution to ASEAN's long-term development and progress? (Choose two responses)

Country	BN	KH	ID	LA	MY	MM	PH	SG	TH	VN
ASEAN	12.4%	4.5%	41.5%	2.3%	18.5%	1.9%	7.8%	66.0%	29.9%	15.3%
BN	26.0%	1.3%	50.6%	0.0%	28.6%	0.0%	6.5%	59.7%	26.0%	1.3%
KH	16.4%	29.1%	34.9%	2.1%	11.6%	5.8%	7.4%	59.8%	22.8%	10.1%
ID	17.7%	0.8%	84.5%	0.8%	13.2%	0.8%	3.4%	61.9%	13.6%	3.4%
LA	13.1%	0.6%	10.6%	11.3%	13.1%	1.9%	7.5%	70.6%	39.4%	31.9%
MY	12.9%	0.4%	54.7%	0.4%	51.6%	0.9%	2.2%	58.2%	13.3%	5.3%
MM	5.3%	9.0%	34.9%	3.2%	22.2%	4.2%	2.1%	73.5%	40.7%	4.8%
PH	12.6%	0.0%	33.0%	0.5%	14.9%	2.3%	33.5%	70.7%	24.7%	7.9%
SG	6.2%	0.7%	63.4%	0.4%	15.0%	0.7%	1.8%	82.4%	19.4%	9.9%
TH	11.4%	1.5%	24.9%	1.5%	10.4%	1.5%	7.5%	67.2%	63.2%	10.9%
VN	2.5%	2.0%	23.0%	2.5%	4.5%	1.0%	6.0%	55.5%	35.5%	67.5%

RUSSIA'S INVASION OF UKRAINE

While the Russia-Ukraine war may not command the primary focus of attention in Southeast Asia two years on, the region remains deeply concerned about the conflict's implications for global stability and economic security. Similar to last year's finding, only a minority of 4.6% feel that the war does not affect Southeast Asia. Economic impact continues to be the predominant worry among respondents, with a substantial majority (68.4%) expressing concerns that the potential increase in energy and food prices will lead to economic hardship. This concern ranks as the unchallenged top option for all countries in the region.

In addition to economic worries, 14.5% of respondents are concerned about the erosion of trust in a rules-based order and the violation of national sovereignty. Notably, Singapore respondents top this category at 25.6%, reflecting Singapore's principled stand based on international law which led to its unilateral imposition of sanctions on Russia. Smaller percentages of Southeast Asians believe that the war will worsen tensions between the US and China (8.2%) and exacerbate existing divisions within ASEAN (4.4%).



Q14 What continues to be the most serious impact of the Russia-Ukraine War on Southeast Asia?

Country	Erosion of trust in a rules-based order and violation of national sovereignty		Increase in energy and food prices causing economic hardship		Increase in existing divisions within ASEAN		Worsening tensions between the US and China		Does not affect Southeast Asia	
	2023	2024	2023	2024	2023	2024	2023	2024	2023	2024
ASEAN	25.9%	14.5%	58.3%	68.4%	7.4%	4.4%	5.2%	8.2%	3.2%	4.6%
BN	19.2%	15.6%	38.3%	58.4%	24.2%	7.8%	9.2%	10.4%	9.2%	7.8%
KH	27.6%	14.8%	61.2%	68.8%	3.0%	2.6%	5.2%	9.5%	3.0%	4.2%
ID	20.7%	13.2%	73.6%	68.7%	0.8%	4.9%	4.1%	7.9%	0.8%	5.3%
LA	31.8%	2.5%	52.3%	86.3%	8.4%	3.1%	1.9%	4.4%	5.6%	3.8%
MY	16.9%	17.8%	62.1%	65.3%	9.7%	4.9%	9.7%	9.8%	1.6%	2.2%
MM	28.7%	16.4%	52.2%	60.8%	9.6%	3.2%	2.6%	12.7%	7.0%	6.9%
PH	23.2%	13.0%	70.7%	71.6%	4.0%	4.2%	1.0%	8.8%	1.0%	2.3%
SG	40.9%	25.6%	48.6%	60.4%	3.4%	4.4%	5.8%	5.9%	1.4%	3.7%
TH	17.4%	12.9%	65.3%	69.7%	7.6%	6.0%	8.3%	6.5%	1.4%	5.0%
VN	32.4%	13.0%	58.8%	73.5%	2.9%	2.5%	4.4%	6.0%	1.5%	5.0%

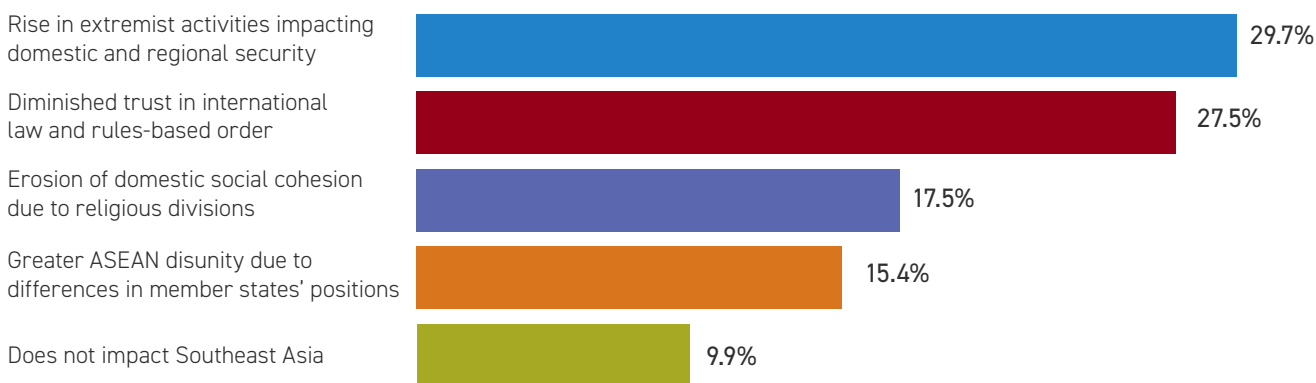
IMPACT OF THE ISRAEL-HAMAS CONFLICT ON SOUTHEAST ASIA

The ongoing Israel-Hamas conflict has emerged as a contentious issue in Southeast Asia, commanding significant attention in the region's domestic politics. Despite its geographical distance, the conflict has reverberated strongly across this diverse multi-racial and multi-religious region. The largest group of respondents (29.7%) express concern that the conflict would catalyse the rise of extremist activities, thereby impacting domestic and regional security. Notably, Singapore (41.0%), Cambodia (39.2%), and the Philippines (37.7%) top this perspective. Singapore and the Philippines, countries that view Hamas as a terrorist group, have condemned its attack on Israel, while Cambodia has denounced all acts of terrorism and violence against innocent civilians.

Malaysia (34.7%), where there is strong support for the International Court of Justice (ICJ) case against Israel's occupation of Palestinian territories. A smaller proportion of respondents (17.5%) anticipate that the conflict would erode domestic social cohesion due to religious divisions. Interestingly, the Muslim-majority countries of Malaysia (15.1%), Indonesia (13.6%), and Brunei (10.4%) exhibit lower levels of concern in this regard, viewing the conflict as a uniting force within their respective countries.

Another 15.4% of the respondents fear that the conflict could exacerbate existing divisions within ASEAN, given differences in member states' positions. This view has borne out in ASEAN's joint statement on the issue which made reference to the respective national statements. A minority (9.9%) believe that the conflict will have no impact on Southeast Asia, one-fifth of them hail from Laos.

The second top concern (27.5%) is the diminished trust in international law and rules-based order. This sentiment is particularly pronounced in Indonesia (47.5%) and



Q15 What is the most likely impact of the Israel-Hamas conflict on Southeast Asia?

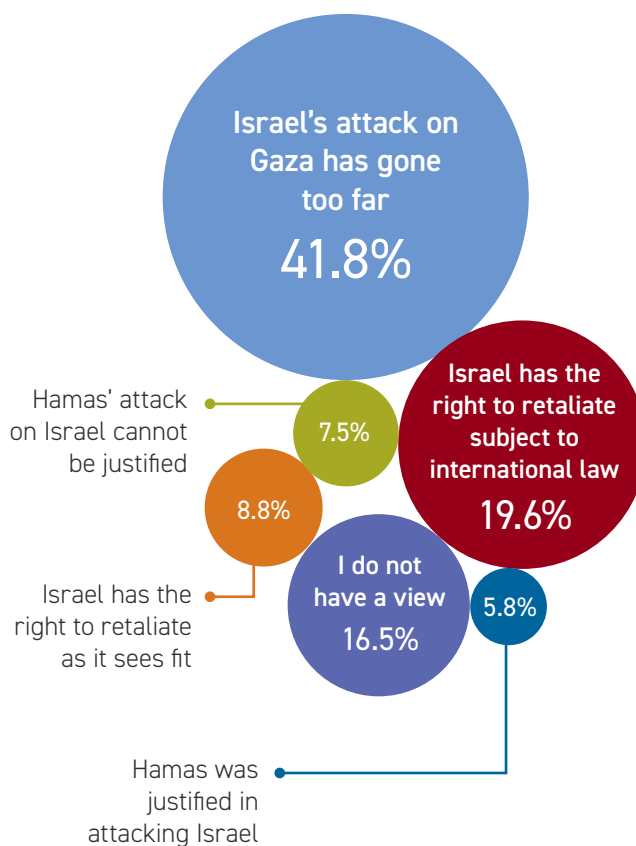
Country	Diminished trust in international law and rules-based order	Erosion of domestic social cohesion due to religious divisions	Greater ASEAN disunity due to differences in member states' positions	Rise in extremist activities impacting domestic and regional security	Does not impact Southeast Asia
ASEAN	27.5%	17.5%	15.4%	29.7%	9.9%
BN	31.2%	10.4%	28.6%	22.1%	7.8%
KH	21.7%	16.4%	11.1%	39.2%	11.6%
ID	47.5%	13.6%	14.0%	21.5%	3.4%
LA	19.4%	15.6%	13.1%	29.4%	22.5%
MY	34.7%	15.1%	17.3%	28.9%	4.0%
MM	32.8%	22.8%	9.0%	19.6%	15.9%
PH	21.9%	15.8%	17.2%	37.7%	7.4%
SG	19.4%	20.9%	15.0%	41.0%	3.7%
TH	14.4%	31.8%	19.4%	24.9%	9.5%
VN	32.5%	12.5%	9.0%	32.5%	13.5%

VIEW OF THE ISRAEL-HAMAS CONFLICT

The sentiments of the large Muslim populations which account for 42% of the region's total population size have heavily influenced the perception of the Israel-Hamas conflict. 41.8% of the respondents express concern that Israel's attack on Gaza had gone too far. At the country level, Brunei (79.2%), Indonesia (77.7%), and Malaysia (64.4%) are particularly concerned.

About a fifth (19.6%) of the respondents believe that Israel has the right to retaliate, subject to international law. This option is preferred by the Philippines (32.1%) and Vietnam (31.0%) while none of Brunei respondents, 8.9% of Malaysia respondents and only 3.0% of the respondents from Indonesia opted for this choice.

The third largest group (16.5%) do not have a view on the issue. This option is popular amongst the respondents from Laos (43.1%) and Myanmar (28.6%). A minority of respondents chose extreme options, including the view that Israel has the right to retaliate as it sees fit (8.8%). This view was supported primarily by respondents from Myanmar (20.6%) and Cambodia (18.5%). Similarly, a small percentage of respondents (7.5%) believe that Hamas' attack on Israel cannot be justified while 5.8% feel the opposite.



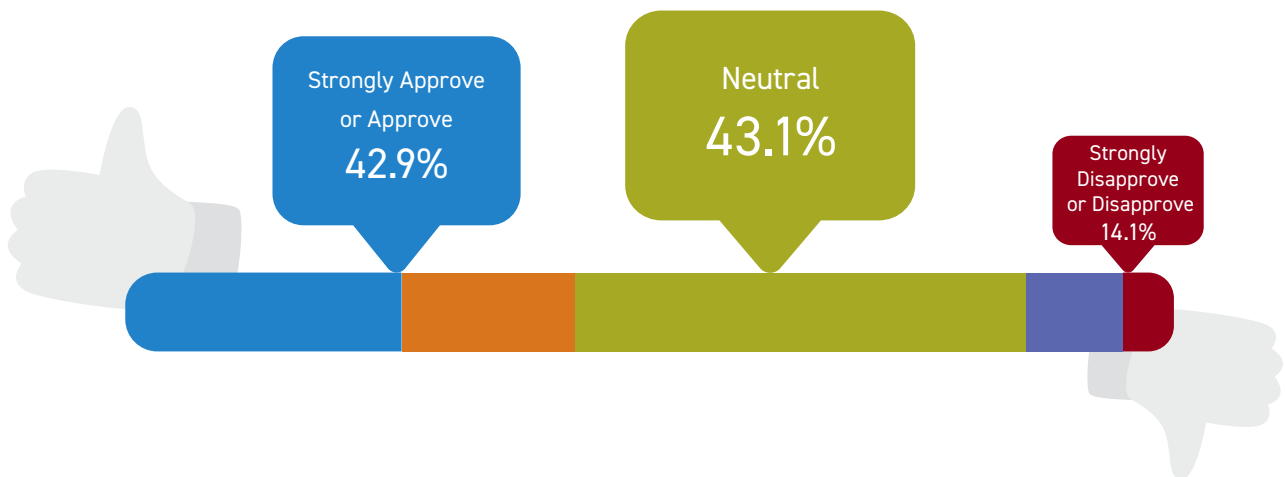
Q16 Choose the statement that best reflects your view of the Israel-Hamas conflict:

Country	Hamas' attack on Israel cannot be justified	Hamas was justified in attacking Israel	Israel has the right to retaliate as it sees fit	Israel has the right to retaliate subject to international law	Israel's attack on Gaza has gone too far	I do not have a view
ASEAN	7.5%	5.8%	8.8%	19.6%	41.8%	16.5%
BN	3.9%	9.1%	1.3%	0.0%	79.2%	6.5%
KH	7.9%	8.5%	18.5%	22.2%	24.9%	18.0%
ID	6.0%	7.5%	1.5%	3.0%	77.7%	4.2%
LA	5.6%	5.0%	10.6%	20.0%	15.6%	43.1%
MY	4.4%	12.4%	1.3%	8.9%	64.4%	8.4%
MM	6.9%	3.7%	20.6%	25.4%	14.8%	28.6%
PH	17.7%	4.2%	11.2%	32.1%	26.5%	8.4%
SG	8.1%	2.9%	4.8%	26.7%	46.2%	11.4%
TH	7.5%	1.5%	13.9%	26.9%	30.3%	19.9%
VN	6.5%	3.0%	4.5%	31.0%	38.5%	16.5%

APPROVAL OF GOVERNMENT'S RESPONSE TO THE ISRAEL-HAMAS CONFLICT

43.1% of ASEAN respondents hold a neutral opinion towards their government's position on the Israel-Hamas conflict, with Myanmar (72.0%) and Laos (64.4%) having the highest share. This can be attributed to the fact that Myanmar remains preoccupied with its domestic political crisis while Laos is focused on its economic growth to overcome its debt crisis.

On the other hand, 42.9% of the respondents express approval of their government's position on the conflict. Respondents from Indonesia (78.2%), Brunei (65.0%), Malaysia (58.6%), and Singapore (57.2%) are the most supportive of their government's stance. Only 14.1% of regional respondents disapprove of their government's stance. Among those who express greater disapproval of their government, Cambodia (18.5%) and Thailand (18.4%) stand out.



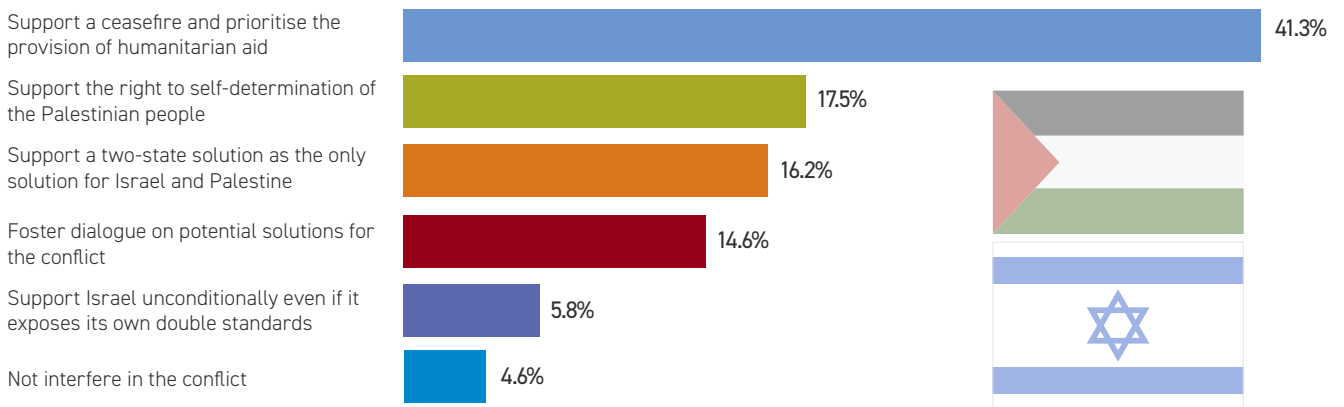
Q17 Do you approve of your government's position on the Israel-Hamas conflict?

Country	Approve	Strongly Approve	Neutral	Disapprove	Strongly Disapprove
ASEAN	26.4%	16.5%	43.1%	9.2%	4.9%
BN	24.7%	40.3%	20.8%	7.8%	6.5%
KH	21.2%	12.7%	47.6%	11.1%	7.4%
ID	45.7%	32.5%	15.1%	5.3%	1.5%
LA	15.0%	3.8%	64.4%	10.6%	6.3%
MY	30.2%	28.4%	27.6%	9.8%	4.0%
MM	6.9%	3.7%	72.0%	10.6%	6.9%
PH	31.6%	8.8%	51.6%	6.0%	1.9%
SG	40.7%	16.5%	30.8%	7.3%	4.8%
TH	24.4%	7.5%	49.8%	13.9%	4.5%
VN	23.5%	10.5%	51.5%	9.5%	5.0%

VIEW OF THE INTERNATIONAL COMMUNITY'S RESPONSES TO THE ISRAEL-HAMAS CONFLICT

In line with ASEAN's commitment on upholding the tenets of international humanitarian law, the non-use of force, and peaceful resolution of disputes, Southeast Asians have demonstrated a strong embrace of these principles. The largest group of respondents (41.3%) advocated for international support for a ceasefire and the prioritisation of humanitarian aid. This sentiment is prevalent across all ASEAN countries, except for Brunei whose primary viewpoint (42.9%) is in favour of international backing for the self-determination of the Palestinian people, which also represents the region's second most popular stance at 17.5%.

The third prevalent perspective (16.2%) is the international endorsement of a two-state solution as the only solution for Israel and Palestine, notably championed by respondents from Singapore (24.9%) and Cambodia (22.2%), countries known for their principled stances in global affairs. This is followed closely by the viewpoint advocating for international facilitation of dialogues on potential solutions for the conflict (14.6%), notably supported by respondents from Myanmar (22.8%) who are grappling with a multifaceted civil conflict. Conversely, outright backing for Israel (5.8%) found no favour in Brunei and received minimal support from Indonesia (0.8%) and Malaysia (0.4%). The least favoured option (4.6%) is non-interference in the conflict, with most of the proponents hailing from Laos (18.1%).



Q18 The international community should...

Country	Foster dialogue on potential solutions for the conflict	Support a ceasefire and prioritise the provision of humanitarian aid	Support a two-state solution as the only solution for Israel and Palestine	Support Israel unconditionally even if it exposes its own double standards	Support the right to self-determination of the Palestinian people	Not interfere in the conflict
ASEAN	14.6%	41.3%	16.2%	5.8%	17.5%	4.6%
BN	6.5%	37.7%	11.7%	0.0%	42.9%	1.3%
KH	17.5%	31.2%	22.2%	14.3%	11.1%	3.7%
ID	9.8%	36.2%	18.1%	0.8%	35.1%	0.0%
LA	16.9%	35.6%	10.0%	11.9%	7.5%	18.1%
MY	6.2%	43.1%	19.6%	0.4%	29.3%	1.3%
MM	22.8%	36.5%	12.7%	9.0%	12.2%	6.9%
PH	19.1%	50.7%	15.8%	7.4%	5.6%	1.4%
SG	12.8%	46.9%	24.9%	2.6%	10.3%	2.6%
TH	19.9%	43.8%	12.9%	7.5%	10.0%	6.0%
VN	14.5%	51.0%	14.5%	4.5%	11.0%	4.5%

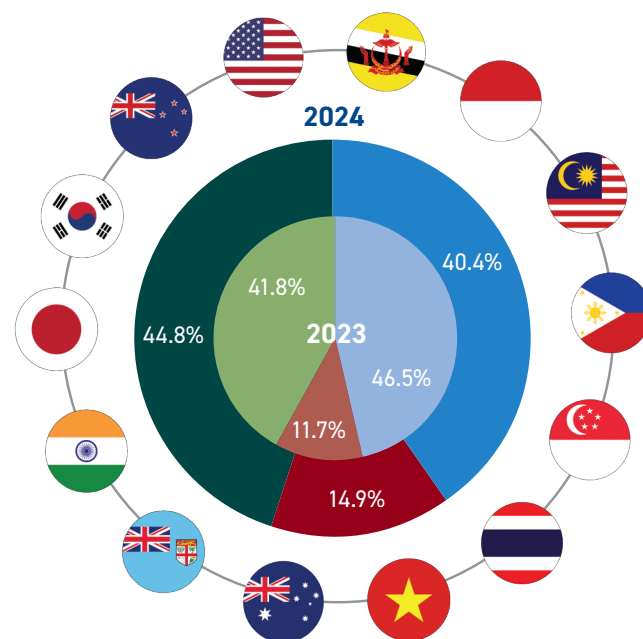
VIEWS ON THE US-LED INDO-PACIFIC ECONOMIC FRAMEWORK FOR PROSPERITY

More than a year on from the Indo-Pacific Economic Framework for Prosperity's (IPEF) launch in May 2022, sentiments surrounding its potential effectiveness and benefits have further waned. In the latest reading, positive sentiments about the IPEF declined from 46.5% last year to 40.4% this year, while 44.8% of Southeast Asians respondents are increasingly unsure about the impact and effectiveness of the IPEF, rising from a 41.8% share from a year before. Negative sentiments have also increased from 11.7% last year to 14.9% this year.

Of those who are positive about the IPEF, Vietnam (64.0%) and the Philippines (62.8%) stand out. Brunei (58.4%), Laos (56.9%), Malaysia (52.4%), and Myanmar (51.9%) display the most uncertainty over IPEF's impact, with notably two out of this group – Brunei and Malaysia – being founding IPEF members, whilst Laos and Myanmar are not. Of those who are negative about the IPEF, Brunei (26.0%) and Indonesia (25.7%) express the highest levels.

Whilst it may be intuitive to conclude why non-members may be unsure or neutral about its relative usefulness, the swing of positive sentiments to uncertainty is perplexing for countries that were positive about IPEF's impact just a year before.

Both the IPEF founding members Brunei and Malaysia demonstrate this said swing. Compared to 2023, only 15.6% of Brunei and 26.7% of Malaysia respondents view the IPEF favourably for their countries, a significant fall by 52.7 and 13.6 percentage points respectively.



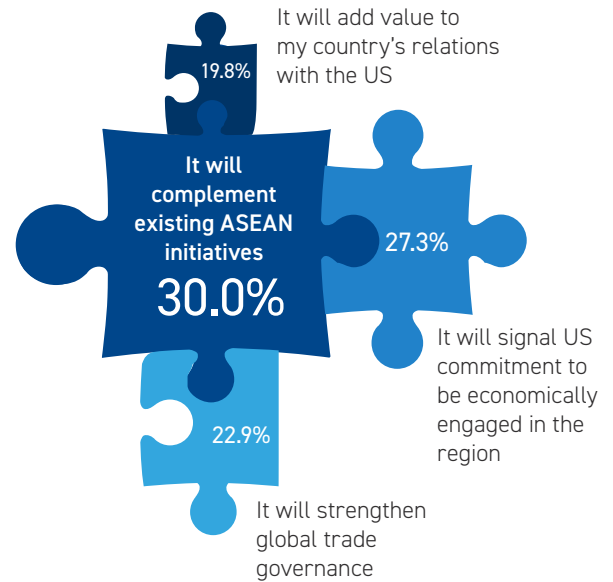
Q19 The overall impact and effectiveness of the US-led Indo-Pacific Economic Framework for Prosperity (IPEF) is likely to be:

Country	Positive		Negative		Not Sure	
	2023	2024	2023	2024	2023	2024
ASEAN	46.5%	40.4%	11.7%	14.9%	41.8%	44.8%
BN	68.3%	15.6%	8.3%	26.0%	23.3%	58.4%
KH	31.3%	39.7%	18.7%	17.5%	50.0%	42.9%
ID	34.7%	32.5%	13.2%	25.7%	52.1%	41.9%
LA	35.5%	33.1%	8.4%	10.0%	56.1%	56.9%
MY	40.3%	26.7%	15.3%	20.9%	44.4%	52.4%
MM	60.9%	41.8%	11.3%	6.3%	27.8%	51.9%
PH	58.6%	62.8%	8.1%	10.7%	33.3%	26.5%
SG	37.5%	37.7%	16.8%	14.3%	45.7%	48.0%
TH	41.7%	49.8%	11.8%	11.9%	46.5%	38.3%
VN	55.9%	64.0%	5.1%	5.5%	39.0%	30.5%

REASONS FOR POSITIVE ATTITUDES TOWARDS IPEF

Q20A I feel that Indo-Pacific Economic Framework for Prosperity (IPEF) is positive because...

The positive sentiment can be mainly attributed to respondents feeling that the IPEF would be able to complement existing ASEAN initiatives (30.0%) with respect to strengthening trade and investment capacities and external ties. Most of this sentiment is exhibited by Brunei (50.0%), Thailand (42.0%), and Laos (37.7%). Interestingly, Laos as a non-member also sees a framework such as IPEF potentially benefitting ASEAN as a whole. 27.3% of respondents see the IPEF as a signal of ongoing US commitment and economic engagement in the region, most cited by Singapore (42.7%), Vietnam (39.1%), and Thailand (31.0%). The IPEF at its core is aimed at strengthening global trade governance, yet it does not come out strongly as the main driver of its positive impact for Southeast Asian economies (22.9%).



831 respondents who chose the "Positive" option in Q19

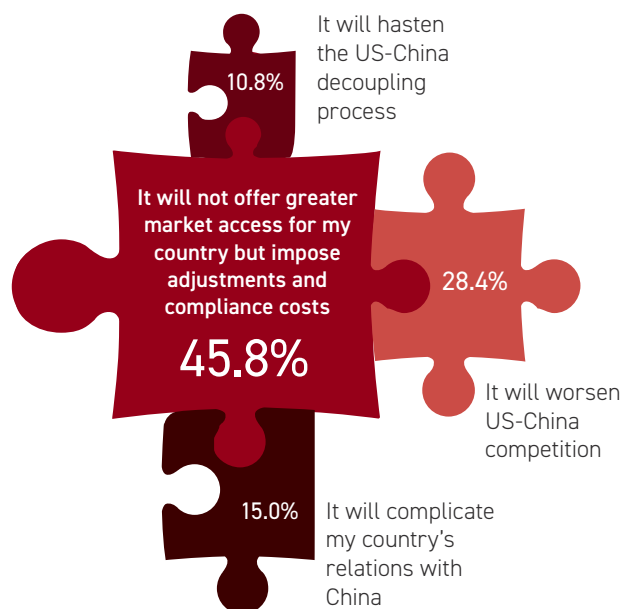
Country	It will add value to my country's relations with the US		It will complement existing ASEAN initiatives		It will signal US commitment to be economically engaged in the region		It will strengthen global trade governance	
	2023	2024	2023	2024	2023	2024	2023	2024
ASEAN	24.3%	19.8%	30.4%	30.0%	31.3%	27.3%	14.1%	22.9%
BN	14.6%	16.7%	52.4%	50.0%	24.4%	25.0%	8.5%	8.3%
KH	14.3%	34.7%	42.9%	22.7%	33.3%	21.3%	9.5%	21.3%
ID	19.0%	16.3%	16.7%	18.6%	45.2%	26.7%	19.0%	38.4%
LA	36.8%	26.4%	28.9%	37.7%	18.4%	18.9%	15.8%	17.0%
MY	20.0%	20.0%	30.0%	26.7%	42.0%	28.3%	8.0%	25.0%
MM	47.1%	7.6%	20.0%	27.8%	14.3%	20.3%	18.6%	44.3%
PH	22.4%	15.6%	32.8%	30.4%	24.1%	20.0%	20.7%	34.1%
SG	21.8%	18.4%	30.8%	24.3%	30.8%	42.7%	16.7%	14.6%
TH	23.3%	18.0%	33.3%	42.0%	36.7%	31.0%	6.7%	9.0%
VN	23.7%	24.2%	15.8%	19.5%	43.4%	39.1%	17.1%	17.2%

REASONS FOR NEGATIVE ATTITUDES TOWARDS IPEF

Q20B I feel that Indo-Pacific Economic Framework for Prosperity (IPEF) is negative because...

In terms of perceptions regarding the negative impact of the IPEF on Southeast Asia, most respondents continue to be concerned about the lack of market access offered by the IPEF despite the additional adjustment and compliance costs it would bring. 45.8% of respondents cite this as the biggest reason for their negative sentiment towards the IPEF's impact, compared to 28.4% of respondents last year. This marks a significant rise of this viewpoint which is most strongly voiced by Brunei (70.0%), Singapore (56.4%), and Laos (50.0%). Of these countries, Laos' sentiment as a non-member may also indicate one of the strongest reasons for the lack of interest to participate in the IPEF.

Fears of the IPEF contributing to the worsening of US-China competition declined from 33.9% last year to 28.4% this year. Perhaps given the lack of momentum in the IPEF and from the other results indicative of a general lack of interest, the impact of US-China relations is now a downplayed concern. On the flipside, as negotiations progress and more details surface on the intricacies of the terms of the agreement, countries may be more cognisant of the extent to which the IPEF could bring more costs than benefits.



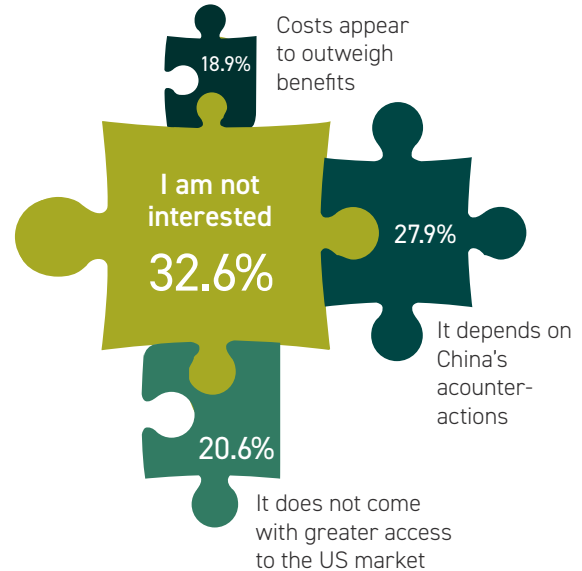
293 respondents who chose the "Negative" option in Q19

Country	It will complicate my country's relations with China		It will hasten the US-China decoupling process		It will not offer greater market access for my country but impose adjustments and compliance costs		It will worsen US-China competition	
	2023	2024	2023	2024	2023	2024	2023	2024
ASEAN	13.4%	15.0%	24.2%	10.8%	28.4%	45.8%	33.9%	28.4%
BN	0.0%	15.0%	40.0%	5.0%	30.0%	70.0%	30.0%	10.0%
KH	8.0%	12.1%	12.0%	15.2%	64.0%	39.4%	16.0%	33.3%
ID	6.3%	11.8%	18.8%	8.8%	31.3%	39.7%	43.8%	39.7%
LA	22.2%	18.8%	11.1%	0.0%	33.3%	50.0%	33.3%	31.3%
MY	0.0%	4.3%	26.3%	10.6%	10.5%	46.8%	63.2%	38.3%
MM	15.4%	16.7%	23.1%	16.7%	30.8%	25.0%	30.8%	41.7%
PH	25.0%	26.1%	25.0%	8.7%	0.0%	39.1%	50.0%	26.1%
SG	17.1%	2.6%	25.7%	7.7%	20.0%	56.4%	37.1%	33.3%
TH	11.8%	25.0%	17.6%	16.7%	35.3%	45.8%	35.3%	12.5%
VN	28.6%	18.2%	42.9%	18.2%	28.6%	45.5%	0.0%	18.2%

REASONS FOR UNSURE ATTITUDE TOWARDS IPEF

Q20C I am not sure about the Indo-Pacific Economic Framework for Prosperity (IPEF) because...

One third of the region (32.6%), IPEF members and non-members alike, show no interest in it. More than half of the respondents from Brunei (51.1%), Laos (50.5%), and Myanmar (50.0%) are not interested in it. Besides an apparent lack of interest, there is also perhaps a strategic element linked to the unsure responses, with the IPEF's impact closely tied to potential counteractions by China with 27.9% of respondents citing this. Amongst the most concerned about this are Thailand (48.1%), the Philippines (33.3%), and Malaysia (28.8%), all being IPEF members and having strong trade links with China. As trade tensions continue to heighten and given ASEAN's opportune, yet delicate position in the middle of these, being more sensitised to strategic responses and potential tit-for-tat actions by the major economic powers is a given.



870 respondents who chose the "Not Sure" option in Q19

Country	There is little information available	It depends on what emerges from the negotiations	It depends on China's counter-actions		It does not come with greater access to the US market		I am not interested		Costs appear to outweigh benefits
	2023	2023	2023	2024	2023	2024	2023	2024	2024
ASEAN	27.2%	35.5%	12.5%	27.9%	9.0%	20.6%	15.8%	32.6%	18.9%
BN	17.9%	28.6%	17.9%	20.0%	17.9%	15.6%	17.9%	51.1%	13.3%
KH	28.4%	23.9%	6.0%	24.7%	4.5%	22.2%	37.3%	34.6%	18.5%
ID	25.4%	34.9%	7.9%	21.6%	14.3%	23.4%	17.5%	22.5%	32.4%
LA	23.3%	33.3%	11.7%	22.0%	1.7%	13.2%	30.0%	50.5%	14.3%
MY	30.9%	38.2%	14.5%	28.8%	12.7%	22.9%	3.6%	33.9%	14.4%
MM	21.9%	21.9%	25.0%	26.5%	6.3%	13.3%	25.0%	50.0%	10.2%
PH	33.3%	51.5%	9.1%	33.3%	0.0%	19.3%	6.1%	17.5%	29.8%
SG	24.2%	46.3%	4.2%	27.5%	16.8%	31.3%	8.4%	29.8%	11.5%
TH	32.8%	40.3%	13.4%	48.1%	4.5%	16.9%	9.0%	11.7%	23.4%
VN	34.0%	35.8%	15.1%	26.2%	11.3%	27.9%	3.8%	24.6%	21.3%

VIEWS ON THE ASEAN DIGITAL ECONOMY FRAMEWORK AGREEMENT

The ASEAN Digital Economy Framework Agreement (DEFA) will be the first regional digital agreement of its kind in the world. It aims to offer a more integrated approach to ASEAN's digital economy development through the use of rules-based mechanisms and standards. Negotiations were launched formally in September 2023, with a first round completed in December 2023. If successfully implemented, the DEFA has the potential to increase the value of ASEAN's digital economy to US\$2 trillion by 2030, amounting to an additional US\$1 trillion on top of the current business-as-usual trajectory.

There are some notable challenges ahead as the negotiations progress where meaningful digital economy integration will be sought whilst balancing the differing levels of digital capabilities, digital development approaches, and mindsets amongst the ASEAN member states. To translate a broad-based regional agreement to a domestic setting will also be a key challenge in making the DEFA a reality.

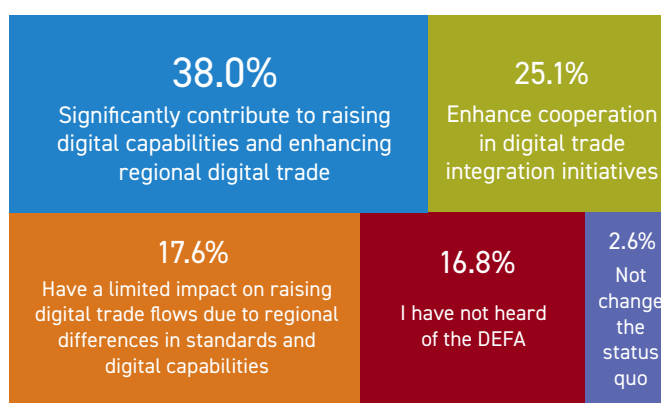
The largest group of regional respondents (38.0%) believe that the DEFA will be able to significantly contribute to raising digital capabilities and enhancing regional digital trade. The most bullish countries with respect to this sentiment are Vietnam (59.0%), the Philippines (53.0%), Thailand (49.3%), and Indonesia (49.1%).

The second largest group of respondents (25.1%) also notably expect the DEFA to enhance cooperation in digital trade integration initiatives.

Singapore (38.5%), Malaysia (29.3%), Indonesia (27.5%), and Cambodia (27.5%) demonstrate their strong sentiments in this respect. To note, the countries showing the most optimistic stance are at different levels of digital development and hence, there is no strong correlation with levels of digital maturity in this regard.

However, 17.6% of the regional respondents are less optimistic towards the DEFA and feel that it will have only limited impact on raising digital trade flows, mostly on account of regional differences in standards and digital capabilities. This sentiment is shared by Brunei (29.9%), Myanmar (27.5%), and Cambodia (19.0%).

Only 16.8% of the respondents have not heard of the agreement at the point of the survey being conducted and 2.6% feel that it will not change the status quo.



Q21 The ASEAN Digital Economy Framework Agreement (DEFA) will:

Country	Significantly contribute to raising digital capabilities and enhancing regional digital trade	Enhance cooperation in digital trade integration initiatives	Have a limited impact on raising digital trade flows due to regional differences in standards and digital capabilities	Not change the status quo	I have not heard of the DEFA
ASEAN	38.0%	25.1%	17.6%	2.6%	16.8%
BN	14.3%	23.4%	29.9%	3.9%	28.6%
KH	36.0%	27.5%	19.0%	1.6%	15.9%
ID	49.1%	27.5%	11.7%	3.4%	8.3%
LA	38.1%	16.3%	15.6%	3.8%	26.3%
MY	33.3%	29.3%	17.8%	2.7%	16.9%
MM	22.2%	13.8%	27.5%	3.7%	32.8%
PH	53.0%	27.0%	10.7%	0.5%	8.8%
SG	26.0%	38.5%	16.5%	1.5%	17.6%
TH	49.3%	21.4%	18.4%	4.0%	7.0%
VN	59.0%	26.0%	8.5%	1.0%	5.5%

Major Powers' Regional Influence and Leadership

33 - 45

This section focuses on the strategic and economic influence of major powers in the region, the strategic relevance of ASEAN Dialogue Partners, and their leadership credibility on global issues such as free trade and upholding international law.

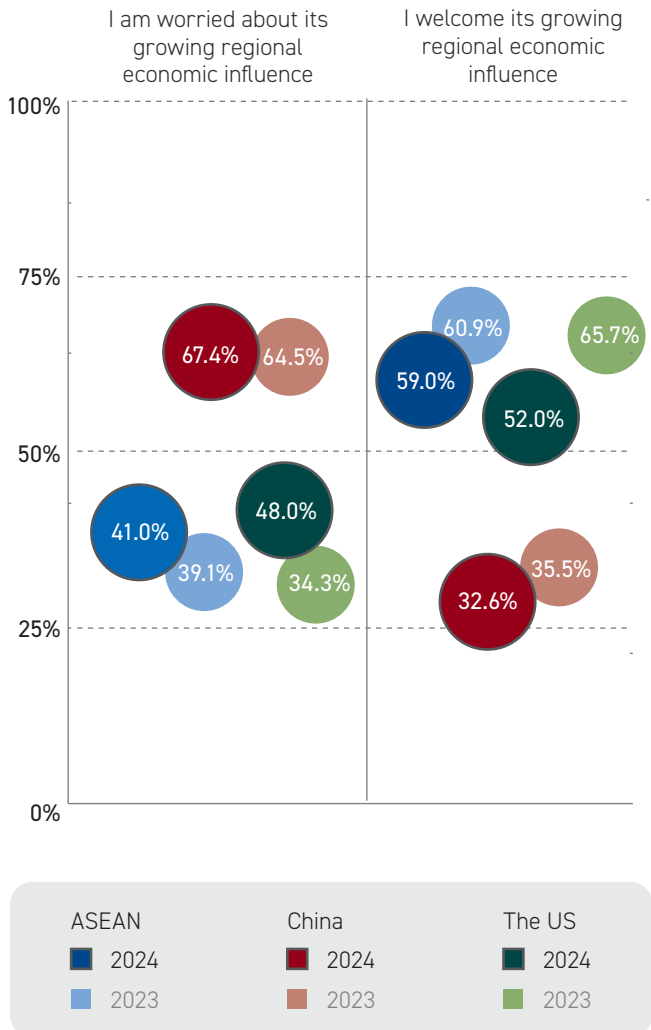
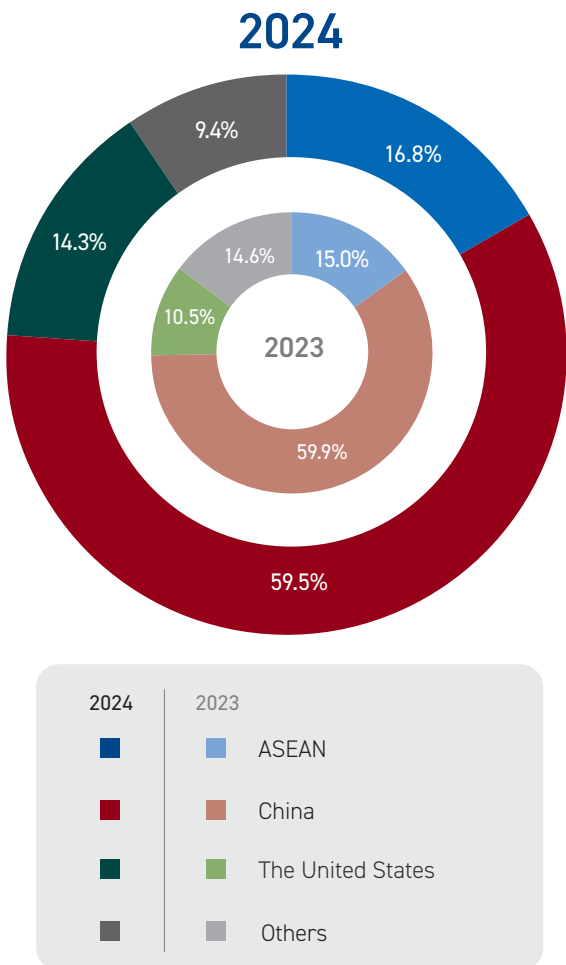
MOST INFLUENTIAL ECONOMIC POWER IN SOUTHEAST ASIA

Perceptions of China as the most influential economic power in Southeast Asia remain high with 59.5% of regional respondents sharing this view. The strongest sentiments come from Laos (77.5%), Thailand (70.6%), and Malaysia (66.7%). As of 2023, China remains the largest foreign investor in Laos, as well as its top export market. The other significant economic players in the region – ASEAN (16.8%) and the US (14.3%) remained in prime positions, moderately rising in positive perceptions from the previous year. This trend saw a lowering in perceptions of economic influence for numerous middle power countries and regional groupings such as Japan (3.7%), the EU (2.8%), the UK (0.8%) and Australia (0.5%).

Even as the perception of China's economic influence remains steadfast and strong, the majority of regional respondents are worried about its growing regional economic influence (67.4%) as opposed to those who welcome it (32.6%). Most of this concern stems from Vietnam (87.7%), Myanmar (87.6%), and Thailand (80.3%), which is an interesting trend especially given the strong trade ties that Vietnam and Thailand enjoy with China.

On the other hand, more than half of regional respondents (59.0%) welcome ASEAN's growing economic influence although this optimism has been gradually waning. That said, countries that most welcome ASEAN's growing economic influence are Brunei (85.7%), Malaysia (78.9%), and Indonesia (78.7%), with Malaysia and Indonesia showing a credible uptick in positive sentiments from the previous year.

The US remains the third highest ranked in terms of perceptions on economic influence in the region and this sentiment has been gradually on the rise. 52.0% of the respondents welcome the US' growing economic influence, but only marginally over those who are concerned about this trend at 48.0%. The proportion that welcome this positive sentiment has been moderating at 68.1% in 2022 and 65.7% in 2023. Amongst the countries that most welcome the US' growing economic influence are Brunei (83.3%), the Philippines (81.7%), and Singapore (67.9%).



Q22 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	
	2023	2024	2023	2024	2023	2024	2023	2024	2023	2024	2023	2024	2023	2024	2023	2024	2023	2024
ASEAN	15.0%	16.8%	2.7%	0.5%	59.9%	59.5%	4.2%	2.8%	0.7%	0.6%	4.6%	3.7%	1.0%	1.0%	10.5%	14.3%	1.3%	0.8%
BN	10.0%	18.2%	5.8%	1.3%	44.2%	63.6%	7.5%	1.3%	4.2%	1.3%	12.5%	2.6%	2.5%	0.0%	6.7%	7.8%	6.7%	3.9%
KH	19.4%	11.1%	0.7%	0.5%	75.4%	59.8%	1.5%	4.8%	0.0%	1.1%	0.0%	1.1%	0.0%	0.0%	2.2%	20.1%	0.7%	1.6%
ID	19.0%	28.3%	0.0%	1.1%	71.1%	54.0%	1.7%	1.1%	0.0%	0.0%	3.3%	5.3%	0.0%	2.3%	5.0%	7.9%	0.0%	0.0%
LA	29.9%	8.1%	16.8%	0.0%	20.6%	77.5%	16.8%	4.4%	0.0%	0.0%	6.5%	0.6%	1.9%	1.3%	5.6%	8.1%	1.9%	0.0%
MY	12.1%	16.9%	0.8%	0.0%	65.3%	66.7%	2.4%	0.4%	0.0%	1.3%	2.4%	4.4%	1.6%	0.4%	13.7%	9.3%	1.6%	0.4%
MM	4.3%	6.9%	0.9%	0.0%	72.2%	59.8%	1.7%	5.8%	0.9%	0.5%	5.2%	5.8%	0.0%	1.6%	13.9%	19.6%	0.9%	0.0%
PH	25.3%	26.0%	1.0%	0.0%	36.4%	30.7%	2.0%	3.7%	0.0%	0.5%	7.1%	8.8%	1.0%	1.9%	26.3%	27.9%	1.0%	0.5%
SG	10.6%	14.7%	0.5%	1.1%	70.7%	59.7%	1.4%	0.4%	1.0%	0.4%	1.9%	2.6%	0.5%	0.0%	13.5%	20.5%	0.0%	0.7%
TH	8.3%	8.5%	0.7%	1.0%	74.3%	70.6%	2.8%	3.5%	0.7%	0.5%	3.5%	2.5%	0.0%	1.5%	9.0%	11.4%	0.7%	0.5%
VN	11.0%	29.0%	0.0%	0.0%	69.1%	53.0%	4.4%	3.0%	0.0%	0.5%	3.7%	3.0%	2.2%	1.0%	9.6%	10.5%	0.0%	0.0%

Q23 What is your view of this economic power's influence on your country?

345 respondents who chose the "ASEAN" option in Q22; 1169 respondents who chose the "China" option in Q22; 296 respondents who chose the "The US" option in Q22

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	
	2023	2024	2023	2024	2023	2024	2023	2024	2023	2024	2023	2024
ASEAN	39.1%	41.0%	60.9%	59.0%	64.5%	67.4%	35.5%	32.6%	34.3%	48.0%	65.7%	52.0%
BN	16.7%	14.3%	83.3%	85.7%	13.2%	49.0%	86.8%	51.0%	12.5%	16.7%	87.5%	83.3%
KH	53.8%	76.2%	46.2%	23.8%	50.5%	59.3%	49.5%	40.7%	66.7%	60.5%	33.3%	39.5%
ID	56.5%	21.3%	43.5%	78.7%	50.0%	46.2%	50.0%	53.8%	50.0%	57.1%	50.0%	42.9%
LA	31.3%	92.3%	68.8%	7.7%	72.7%	77.4%	27.3%	22.6%	50.0%	92.3%	50.0%	7.7%
MY	40.0%	21.1%	60.0%	78.9%	61.7%	48.0%	38.3%	52.0%	35.3%	47.6%	64.7%	52.4%
MM	20.0%	30.8%	80.0%	69.2%	79.5%	87.6%	20.5%	12.4%	18.8%	43.2%	81.3%	56.8%
PH	44.0%	33.9%	56.0%	66.1%	83.3%	75.8%	16.7%	24.2%	26.9%	18.3%	73.1%	81.7%
SG	27.3%	30.0%	72.7%	70.0%	61.9%	63.2%	38.1%	36.8%	21.4%	32.1%	78.6%	67.9%
TH	75.0%	47.1%	25.0%	52.9%	86.0%	80.3%	14.0%	19.7%	46.2%	78.3%	53.8%	21.7%
VN	26.7%	43.1%	73.3%	56.9%	86.2%	87.7%	13.8%	12.3%	15.4%	33.3%	84.6%	66.7%

MOST INFLUENTIAL POLITICAL AND STRATEGIC POWER IN SOUTHEAST ASIA

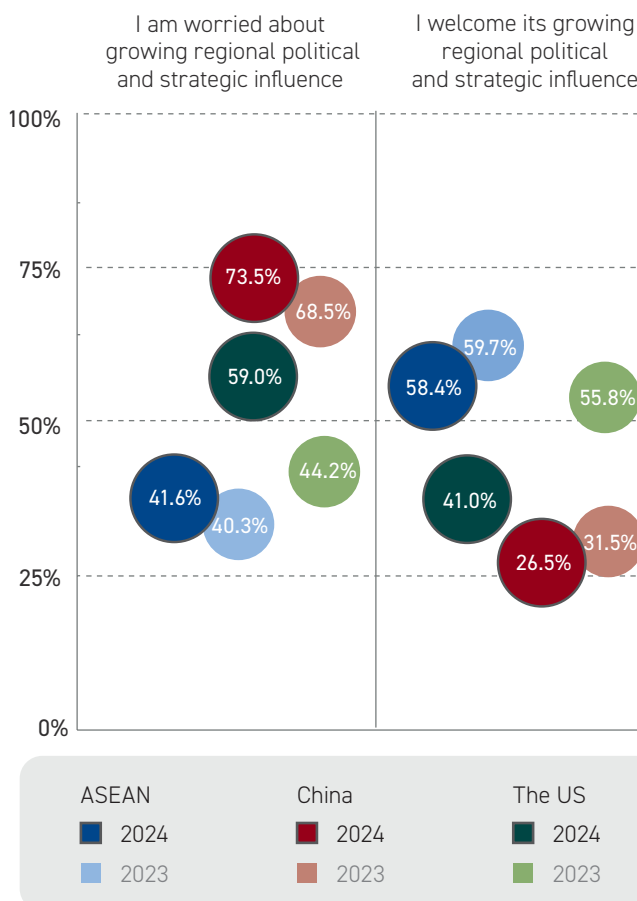
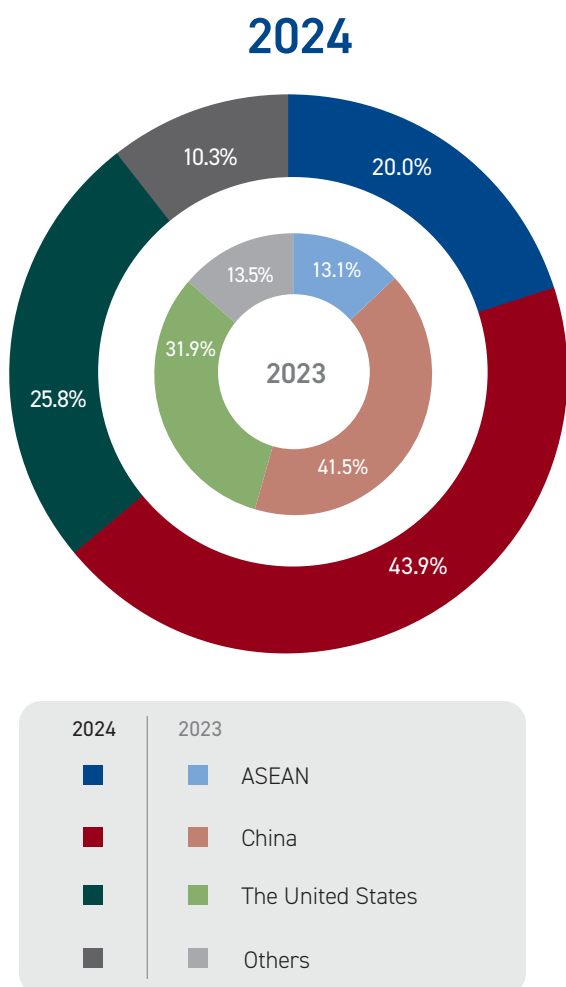
As in previous years, China has maintained its position as the most influential and strategic power in Southeast Asia (43.9%). It has seen a slight increase from 41.5% last year and remains the top choice among all ASEAN countries except for Indonesia and the Philippines. Laos respondents in particular viewed China's influence highly at 64.4%. Conversely, the influence of the US has diminished from 31.9% last year to 25.8% this year although it remains the preferred choice among respondents from the Philippines.

Interestingly, there is a growing acknowledgment of ASEAN's influence, now standing at 20.0%, a notable surge from 13.1% last year. This signifies the increasing significance of the regional bloc in the regional architecture. Notably, ASEAN emerged as the preferred option among Indonesia respondents (34.3%), reflecting the impact of Indonesia's Chairmanship of ASEAN in 2023. However, other middle powers experienced a decline in influence, except for Japan, whose influence nearly doubled from 1.9% to 3.7% following the commemoration of the 50th anniversary of dialogue relations between ASEAN and Japan last year.

Despite China's strong influence in the region, concerns about China persist, with 73.5% of respondents expressing unease, up from 68.5% last year. Vietnam (95.7%) and Myanmar (95.1%) exhibited the highest levels of apprehension, while Brunei registered a significant surge in concern, rising from 5.6% last year to 58.1% this year.

Similarly, confidence in the US has waned. This could be attributed partly to the escalating rivalry between China and the US which led to an uptick in anxiety about the US' growing strategic and political influence, rising from 44.2% to 59.0% this year. Although most ASEAN countries share this concern, exceptions include the Philippines (68.5%), Singapore (63.4%), and Vietnam (54.8%), which perceive US influence more positively than the region.

On the other hand, the region generally welcomes ASEAN's increasing influence with 58.4% of respondents expressing this. This sentiment is particularly strong among respondents from Brunei (76.2%) and Indonesia (74.7%). In contrast, Laos, Cambodia, and Thailand express greater apprehension towards ASEAN's influence, with Laos exhibiting the highest level of concern at 82.4%.



Q24 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	
	2023	2024	2023	2024	2023	2024	2023	2024	2023	2024	2023	2024	2023	2024	2023	2024	2023	2024
ASEAN	13.1%	20.0%	3.0%	0.5%	41.5%	43.9%	4.9%	3.4%	0.9%	0.4%	1.9%	3.7%	1.7%	1.4%	31.9%	25.8%	1.1%	0.9%
BN	4.2%	27.3%	7.5%	0.0%	45.0%	40.3%	9.2%	0.0%	5.0%	0.0%	5.8%	6.5%	7.5%	1.3%	13.3%	19.5%	2.5%	5.2%
KH	6.0%	13.8%	0.7%	0.5%	72.4%	53.4%	3.0%	7.4%	0.0%	0.5%	0.0%	3.2%	0.0%	0.5%	17.9%	20.1%	0.0%	0.5%
ID	24.8%	34.3%	1.7%	1.1%	29.8%	32.5%	5.0%	1.5%	0.8%	0.0%	1.7%	5.3%	0.8%	1.9%	35.5%	23.4%	0.0%	0.0%
LA	17.8%	10.6%	14.0%	0.6%	30.8%	64.4%	17.8%	5.6%	0.9%	0.6%	0.0%	1.3%	2.8%	1.9%	13.1%	15.0%	2.8%	0.0%
MY	21.8%	24.4%	3.2%	0.9%	35.5%	42.7%	0.8%	0.4%	0.0%	0.9%	1.6%	2.7%	0.8%	3.6%	33.9%	23.6%	2.4%	0.9%
MM	4.3%	10.1%	0.9%	0.5%	40.0%	43.4%	1.7%	5.8%	0.0%	0.5%	1.7%	4.2%	0.0%	2.6%	49.6%	32.8%	1.7%	0.0%
PH	18.2%	26.5%	0.0%	0.0%	30.3%	19.5%	3.0%	3.7%	0.0%	0.0%	2.0%	6.5%	2.0%	0.0%	44.4%	42.8%	0.0%	0.9%
SG	12.0%	17.9%	1.0%	0.4%	33.2%	38.8%	2.4%	1.1%	2.4%	1.5%	1.0%	2.2%	0.0%	0.7%	48.1%	37.0%	0.0%	0.4%
TH	9.0%	8.0%	0.7%	0.5%	45.8%	58.2%	2.8%	5.0%	0.0%	0.0%	1.4%	3.0%	2.8%	1.0%	36.1%	22.9%	1.4%	1.5%
VN	13.2%	27.0%	0.7%	0.0%	52.2%	46.0%	2.9%	3.5%	0.0%	0.0%	3.7%	2.0%	0.0%	0.5%	27.2%	21.0%	0.0%	0.0%

Q25 What is your view of this political and strategic power's influence on your country?

405 respondents who chose the "ASEAN" option in Q24; 856 respondents who chose the "China" option in Q24; 535 respondents who chose the "The US" option in Q24.

Country	ASEAN				China				The United States			
	I am worried about growing regional political and strategic influence		I welcome its growing regional political and strategic influence		I am worried about growing regional political and strategic influence		I welcome its growing regional political and strategic influence		I am worried about growing regional political and strategic influence		I welcome its growing regional political and strategic influence	
	2023	2024	2023	2024	2023	2024	2023	2024	2023	2024	2023	2024
ASEAN	40.3%	41.6%	59.7%	58.4%	68.5%	73.5%	31.5%	26.5%	44.2%	59.0%	55.8%	41.0%
BN	0.0%	23.8%	100.0%	76.2%	5.6%	58.1%	94.4%	41.9%	31.3%	73.3%	68.8%	26.7%
KH	37.5%	61.5%	62.5%	38.5%	52.6%	66.3%	47.4%	33.7%	58.3%	57.9%	41.7%	42.1%
ID	33.3%	25.3%	66.7%	74.7%	61.1%	57.0%	38.9%	43.0%	67.4%	72.6%	32.6%	27.4%
LA	42.1%	82.4%	57.9%	17.6%	63.6%	68.0%	36.4%	32.0%	42.9%	79.2%	57.1%	20.8%
MY	33.3%	27.3%	66.7%	72.7%	72.7%	56.3%	27.3%	43.8%	57.1%	67.9%	42.9%	32.1%
MM	60.0%	42.1%	40.0%	57.9%	84.8%	95.1%	15.2%	4.9%	28.1%	45.2%	71.9%	54.8%
PH	66.7%	35.1%	33.3%	64.9%	86.7%	81.0%	13.3%	19.0%	29.5%	31.5%	70.5%	68.5%
SG	20.0%	30.6%	80.0%	69.4%	69.6%	73.6%	30.4%	26.4%	39.0%	36.6%	61.0%	63.4%
TH	76.9%	56.3%	23.1%	43.8%	95.5%	83.8%	4.5%	16.2%	61.5%	80.4%	38.5%	19.6%
VN	33.3%	31.5%	66.7%	68.5%	93.0%	95.7%	7.0%	4.3%	27.0%	45.2%	73.0%	54.8%

DIALOGUE PARTNERS' STRATEGIC RELEVANCE TO ASEAN

This question was analysed using a rank-sum method. A 10% weightage was applied to each country to ensure proportionality of responses, followed by a calculation of survey-weighted mean ranks and scores for each of the Dialogue Partners.












Southeast Asians have affirmed China as the most strategically significant partner to ASEAN with a mean score of 8.98 out of 11. Following closely are the US (8.79) and Japan (7.48). Notably, respondents from Brunei, Cambodia, Indonesia, Laos, Malaysia, Singapore, and Thailand expressed strong support for China, while only a modest number of respondents from the Philippines made the same choice, ranking China fourth instead. Conversely, the US enjoys significant strategic confidence from respondents in the Philippines, Myanmar, and Vietnam as their top choice.

While Japan may not lead the rankings as the most strategically relevant dialogue partner, it has secured third position across most ASEAN countries. Notably, Japan receives stronger support from Brunei and the

Philippines, where it is their second choice. The EU, occupying the fourth rank (6.38), garnered more positive views from respondents in the Philippines (3rd place) while it is less appealing to respondents from Brunei (8th place).

South Korea (5.71), the United Kingdom (5.52), and Australia (5.51) emerged as middle-ranking countries by respondents, securing the 5th, 6th, and 7th positions respectively. Although South Korea has been ranked as the 6th or 7th choice by most, it garnered more favourable rankings from respondents in Indonesia (4th place). Conversely, the UK received less favourable perceptions from Indonesian respondents (9th place), yet enjoyed a more positive outlook from respondents in Cambodia, the Philippines, and Thailand (5th place).

Q26 Rank the following Dialogue Partners in order of strategic relevance to ASEAN:

ASEAN Average		
Rank	Dialogue Partner	Mean Score (Out of 11)
1	 China	8.98
2	 The United States	8.79
3	 Japan	7.48
4	 The European Union	6.38
5	 Republic of Korea	5.71
6	 The United Kingdom	5.52
7	 Australia	5.51
8	 Russian Federation	5.08
9	 India	5.04
10	 Canada	3.81
11	 New Zealand	3.70

Australia's ranking displayed the widest disparity among Southeast Asians, ranging from 4th to 9th place. It garnered stronger support from Brunei and Singapore respondents (4th place) while less from Thailand (9th place). While most Southeast Asian countries enjoy positive relations with these three middle powers, the general perception varies depending on bilateral economic relations, cultural influence, and the security roles of these countries in the regional architecture.

Despite its aggression on Ukraine, Russia has claimed the 8th place (5.08) ahead of India, Canada, and New Zealand. This demonstrates Russia's perceived strategic relevance among ASEAN countries, particularly Laos (3rd place), Vietnam (5th place), Indonesia and Thailand (both at 6th place). Notably, Russia ranked last among respondents from the Philippines and Singapore, highlighting the importance of a rules-based order as a strategic asset for these two countries.

Despite its proximity to Southeast Asia, India finds itself ranked ninth (5.04) on average. However, it enjoys more favourable perceptions from strategic partners like Myanmar (5th place) and Singapore (6th place). These positive views likely stem from the historical-cultural connections and robust economic ties with these countries. Conversely, countries such as Cambodia, Laos,

the Philippines, and Vietnam (9th place) which maintain closer diplomatic ties with China, the US, and Russia respectively, perceive India as less strategically significant. This reflects the influence of geopolitical alignments and regional dynamics on perceptions of India's importance within Southeast Asia.

Canada (3.81) and New Zealand (3.70) demonstrate a wider disparity in scores compared to countries in the 5th to 9th place. Despite maintaining amicable relations with ASEAN, these two countries could be perceived to be less strategically relevant within the Southeast Asian context. This perception could stem from factors such as their smaller size and population, geographical distance and relatively weaker trade and people-to-people ties with Southeast Asia as compared to other middle powers. Canada for instance is the last dialogue partner (apart from the UK) to attain a strategic partnership with ASEAN, coupled with its non-membership in ASEAN-led mechanisms such as the East Asia Summit (EAS) and the ASEAN Defence Ministers' Meeting Plus (ADMM-Plus) despite expressing interest. This may contribute to its perceived lower strategic relevance in Southeast Asia. Similarly, New Zealand's limited engagement in regional security initiatives might also influence perceptions of its significance in the region.

** In the dataset for Thailand, both India and the Republic of Korea exhibited identical mean rank and mean score. The Republic of Korea was ranked ahead due to its lower standard deviation, indicating a greater proportion of respondents who ranked it closer to the mean rank of 7th place and mean score of 5, as compared to India.*

Ranking Order by ASEAN Member States

	BN	KH	ID	LA	MY	MM	PH	SG	TH*	VN
China	1	1	1	1	1	2	4	1	1	2
The United States	3	2	2	2	2	1	1	2	2	1
Japan	2	3	3	4	3	3	2	3	3	3
The European Union	8	4	5	5	4	4	3	5	4	4
Republic of Korea	5	6	4	6	6	6	8	7	7	6
The United Kingdom	6	5	9	7	8	7	5	8	5	7
Australia	4	7	7	8	5	8	6	4	9	8
Russian Federation	9	8	6	3	9	9	11	11	6	5
India	7	9	8	9	7	5	9	6	8	9
Canada	11	10	11	11	10	10	7	10	11	10
New Zealand	10	11	10	10	11	11	10	9	10	11

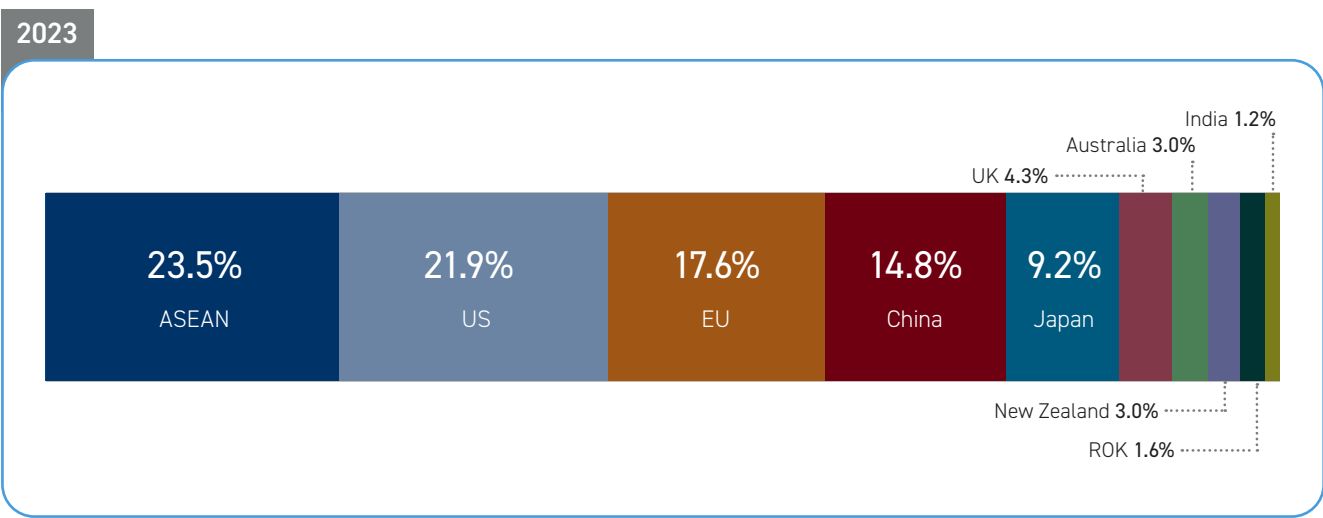
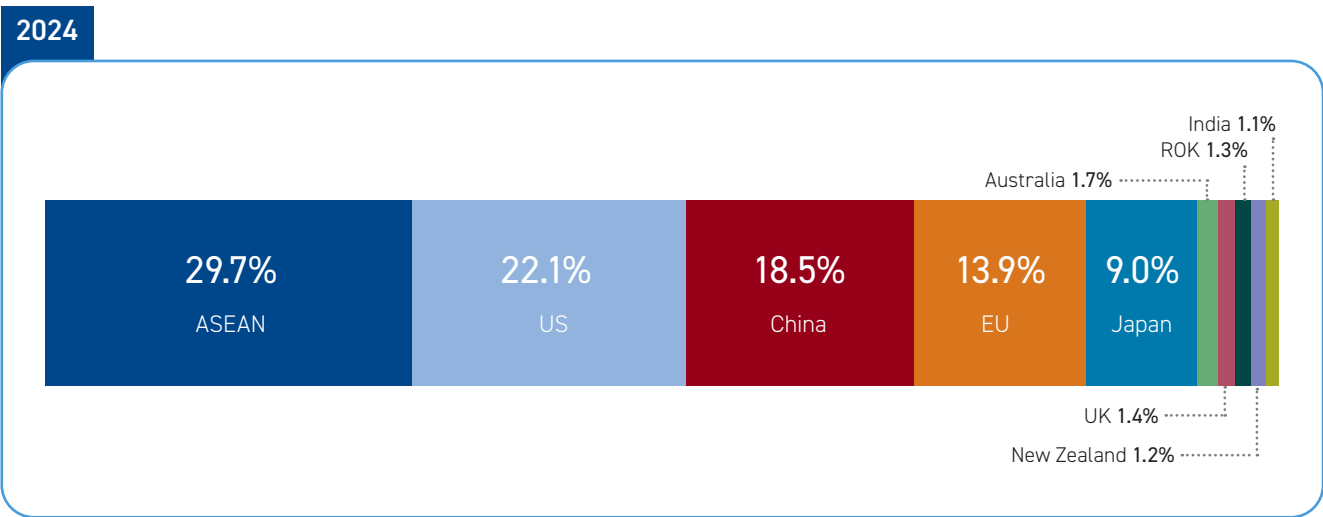
LEADERSHIP IN CHAMPIONING GLOBAL FREE TRADE

The region continues to grapple with a myriad of challenges related to global free trade, including trade protectionism, geopolitical tensions, and trade wars among major economies.

Amidst these challenges, ASEAN has emerged as the region's foremost advocate for global free trade, with 29.7% of the respondents expressing confidence in its leadership. This marks an increase from 23.5% last year, reaffirming the region's support for a robust multilateral trading system led by ASEAN. Notably, ASEAN enjoys the highest approval ratings among respondents from Brunei, Indonesia, Malaysia, the Philippines, Singapore, and Vietnam.

The US maintains its second-place position, garnering 22.1% of the region's confidence. At the country level, it is the preferred choice among respondents from Myanmar (40.2%), and Thailand (27.9%). Meanwhile, China has ascended to the third position with 18.5% support, a modest increase from 14.8% last year, primarily backed by respondents from Laos (45.0%).

Confidence in the EU has waned, declining from 17.6% to 13.9% relegating it to the fourth position from third place last year. Other middle powers including Australia, India, Japan, South Korea, and the UK also witnessed a decline in confidence levels among respondents.



Q27 Who do you have the most confidence in to champion the global free trade agenda?

2024										
Country	ASEAN	Australia	China	The European Union	India	Japan	New Zealand	Republic of Korea	The United Kingdom	The United States
ASEAN	29.7%	1.7%	18.5%	13.9%	1.1%	9.0%	1.2%	1.3%	1.4%	22.1%
BN	41.6%	3.9%	20.8%	11.7%	2.6%	9.1%	2.6%	2.6%	0.0%	5.2%
KH	21.7%	0.0%	21.7%	16.4%	0.0%	9.5%	0.5%	0.0%	2.6%	27.5%
ID	50.2%	1.1%	18.9%	8.3%	0.4%	9.4%	0.0%	3.0%	0.4%	8.3%
LA	18.1%	0.6%	45.0%	12.5%	0.0%	3.8%	0.0%	0.0%	0.6%	19.4%
MY	33.8%	3.1%	27.6%	6.7%	2.2%	8.4%	1.3%	0.9%	1.8%	14.2%
MM	14.3%	2.6%	6.3%	18.5%	1.1%	12.2%	0.0%	3.2%	1.6%	40.2%
PH	35.3%	2.3%	8.4%	10.2%	0.9%	9.3%	1.4%	0.9%	3.3%	27.9%
SG	34.4%	1.5%	12.1%	11.7%	0.7%	9.2%	5.1%	1.1%	2.6%	21.6%
TH	12.4%	1.5%	18.4%	23.9%	2.0%	10.0%	1.5%	1.0%	1.5%	27.9%
VN	35.5%	0.5%	5.5%	19.5%	1.0%	9.0%	0.0%	0.5%	0.0%	28.5%

2023										
Country	ASEAN	Australia	China	The European Union	India	Japan	New Zealand	Republic of Korea	The United Kingdom	The United States
ASEAN	23.5%	3.0%	14.8%	17.6%	1.2%	9.2%	3.0%	1.6%	4.3%	21.9%
BN	36.7%	3.3%	6.7%	20.0%	3.3%	3.3%	11.7%	1.7%	5.8%	7.5%
KH	5.2%	1.5%	35.8%	18.7%	0.0%	5.2%	0.0%	0.0%	0.7%	32.8%
ID	43.0%	2.5%	18.2%	10.7%	0.8%	10.7%	2.5%	3.3%	5.8%	2.5%
LA	26.2%	10.3%	14.0%	25.2%	0.0%	4.7%	2.8%	0.0%	2.8%	14.0%
MY	28.2%	5.6%	16.9%	15.3%	0.0%	8.9%	4.0%	4.0%	1.6%	15.3%
MM	8.7%	0.0%	9.6%	7.0%	3.5%	13.9%	0.9%	0.9%	2.6%	53.0%
PH	27.3%	1.0%	5.1%	17.2%	0.0%	15.2%	0.0%	2.0%	2.0%	30.3%
SG	25.5%	3.8%	17.3%	17.3%	1.4%	6.3%	5.8%	1.4%	2.4%	18.8%
TH	14.6%	2.1%	17.4%	21.5%	2.1%	9.0%	2.8%	0.7%	18.8%	11.1%
VN	19.9%	0.0%	6.6%	22.8%	0.7%	14.7%	0.0%	1.5%	0.0%	33.8%

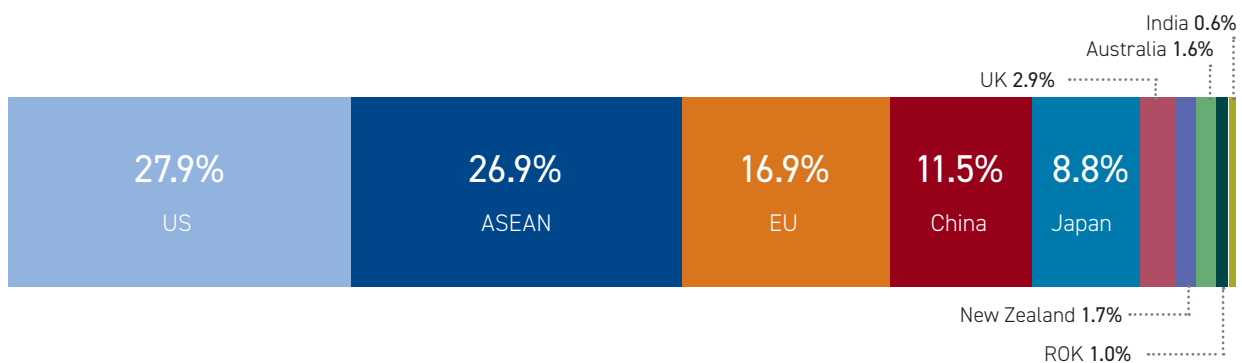
LEADERSHIP IN MAINTAINING RULES-BASED ORDER AND UPHOLDING INTERNATIONAL LAW

The US maintains its status as the region's advocate for maintaining a rules-based order and upholding international law, with a steady approval rating of 27.9%, consistent with the previous year. It remains the preferred choice for several ASEAN countries including Cambodia, Myanmar, the Philippines, Singapore, and Thailand.

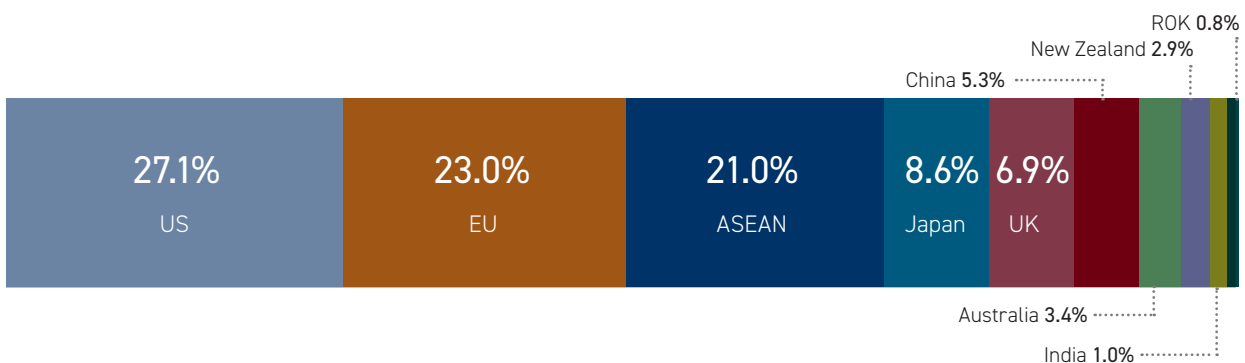
Meanwhile, confidence in ASEAN's leadership has seen a significant increase, rising from 21.0% to 26.9% this year, garnering robust backing from Indonesia (49.1%), Brunei (40.3%) and Vietnam (35.5%). China's proactive diplomatic efforts in the region have contributed to a substantial increase in confidence from 5.3% to 11.5%, primarily supported by respondents from Laos (36.3%).

However, confidence in the EU has declined from 23.0% to 16.9%, resulting in a drop in its ranking from second to third place. Notably, Cambodia and Laos witnessed the most substantial decrease in confidence from 38.8% to 13.2% and from 29.0% to 10.6%, respectively, although the EU remains positively viewed by Singapore and Thailand. Moreover, confidence in middle powers namely Australia, India, and the UK has also experienced a decline, despite their strong advocacy for such principles.

2024



2023



Q28 Who do you have the most confidence in to provide leadership to maintain the rules-based order and uphold international law?

2024										
Country	ASEAN	Australia	China	The European Union	India	Japan	New Zealand	Republic of Korea	The United Kingdom	The United States
ASEAN	26.9%	1.6%	11.5%	16.9%	0.6%	8.8%	1.7%	1.0%	2.9%	27.9%
BN	40.3%	1.3%	11.7%	13.0%	0.0%	10.4%	5.2%	2.6%	3.9%	11.7%
KH	17.5%	2.6%	9.5%	13.2%	0.0%	12.7%	0.0%	0.5%	4.2%	39.7%
ID	49.1%	2.3%	7.9%	14.0%	0.4%	10.2%	1.9%	1.5%	2.3%	10.6%
LA	18.8%	1.3%	36.3%	10.6%	0.6%	8.1%	1.3%	0.6%	1.3%	21.3%
MY	34.2%	2.2%	15.6%	14.7%	0.4%	8.0%	2.2%	1.3%	4.0%	17.3%
MM	15.3%	2.1%	3.2%	17.5%	2.1%	10.1%	0.5%	2.6%	2.1%	44.4%
PH	27.9%	1.4%	4.7%	16.7%	0.0%	5.1%	1.9%	0.0%	4.7%	37.7%
SG	20.9%	1.1%	7.3%	22.7%	1.1%	7.0%	2.9%	0.4%	2.6%	34.1%
TH	10.0%	1.0%	14.4%	26.4%	0.5%	10.9%	1.0%	0.5%	4.0%	31.3%
VN	35.5%	1.0%	4.5%	20.5%	1.0%	6.0%	0.0%	0.0%	0.5%	31.0%

2023										
Country	ASEAN	Australia	China	The European Union	India	Japan	New Zealand	Republic of Korea	The United Kingdom	The United States
ASEAN	21.0%	3.4%	5.3%	23.0%	1.0%	8.6%	2.9%	0.8%	6.9%	27.1%
BN	30.8%	5.8%	2.5%	20.0%	0.8%	14.2%	5.0%	2.5%	10.8%	7.5%
KH	4.5%	0.0%	2.2%	38.8%	0.0%	4.5%	0.7%	0.0%	0.7%	48.5%
ID	43.8%	0.8%	6.6%	16.5%	0.0%	9.9%	1.7%	2.5%	6.6%	11.6%
LA	14.0%	17.8%	5.6%	29.0%	0.0%	6.5%	8.4%	0.0%	11.2%	7.5%
MY	26.6%	4.8%	6.5%	19.4%	0.0%	10.5%	3.2%	0.8%	4.0%	24.2%
MM	12.2%	0.0%	7.0%	6.1%	6.1%	11.3%	2.6%	0.0%	2.6%	52.2%
PH	27.3%	0.0%	2.0%	16.2%	0.0%	10.1%	3.0%	1.0%	4.0%	36.4%
SG	15.9%	2.9%	10.6%	24.5%	1.4%	5.8%	2.4%	0.5%	4.8%	31.3%
TH	12.5%	1.4%	9.0%	32.6%	0.0%	6.9%	2.1%	0.7%	22.9%	11.8%
VN	22.1%	0.7%	1.5%	26.5%	1.5%	6.6%	0.0%	0.0%	1.5%	39.7%

COOPERATION WITH THE QUADRILATERAL SECURITY DIALOGUE

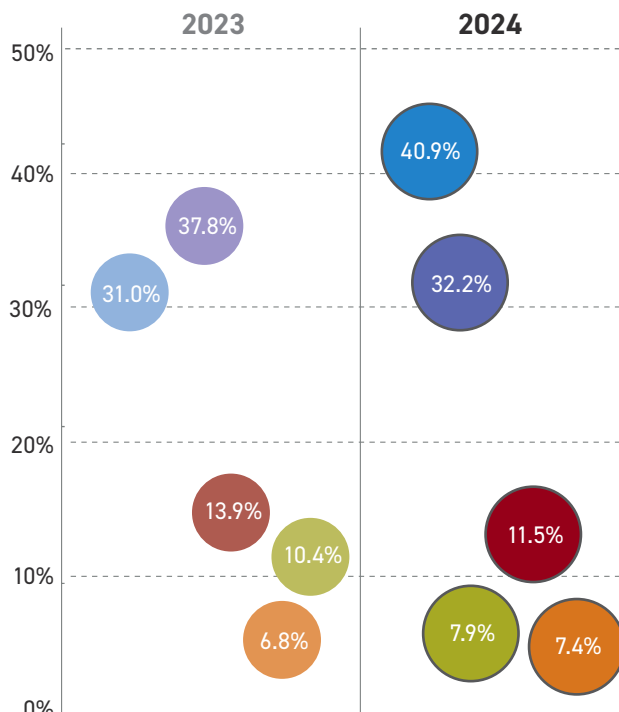
The Quadrilateral Security Dialogue (Quad) comprising the US, India, Japan, and Australia continues to build momentum in delivering public goods to Southeast Asia. The prevailing sense among 40.9% of the region's respondents is that cooperation with the Quad is likely to bring benefits, as compared to 31.0% in 2023. The countries that perceive a greater likelihood of benefits from potential ASEAN-Quad cooperation are Cambodia (53.4%), Laos and Vietnam (both at 52.5%).

One third of the respondents (32.2%) view the Quad as being complementary to ASEAN's efforts, declining from 37.8% last year. The Philippines (42.3%) and Indonesia (40.4%) tend to be more sanguine in their views about potential cooperation with the Quad.

Conversely, 11.5% of the respondents say that cooperation with the Quad could threaten ASEAN centrality and compete with other ASEAN-led mechanisms such as the East Asia Summit (EAS), the ASEAN Regional Forum (ARF), and the ASEAN Defence Ministers' Meeting Plus (ADMM-Plus), albeit a drop from 13.9% last year.

Fears of being forced to choose sides should ASEAN cooperate with the Quad appears to have eased from 10.4% in 2023 to 7.9% in 2024. However, these fears are at a higher level in Myanmar (13.2%), Thailand (12.4%), and Singapore (10.6%).

The fear of provoking China through cooperation increased marginally from 6.8% to 7.4%. The fears of provocation appear elevated in Myanmar (13.8%), Singapore (12.1%), and Brunei (10.4%).



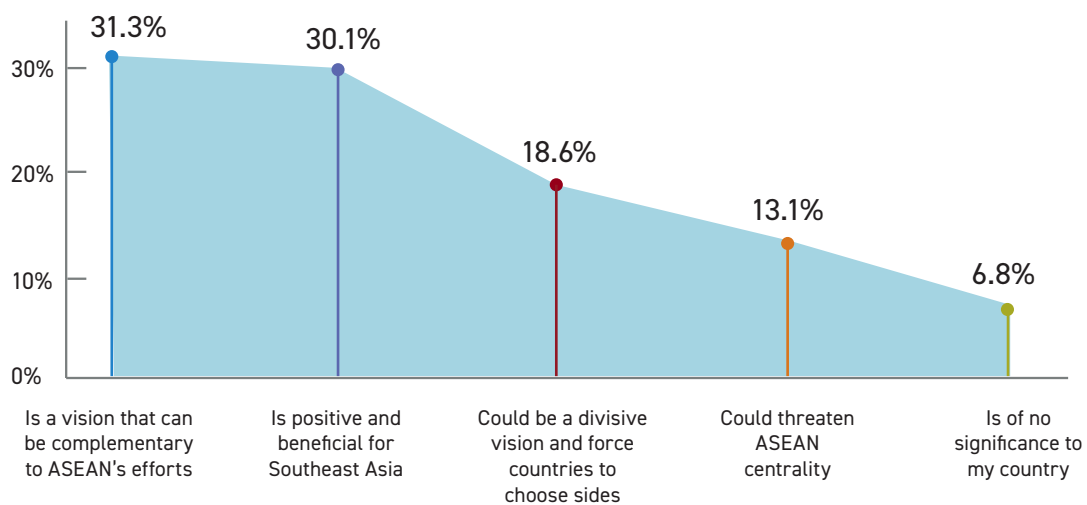
Q29 Cooperation between ASEAN and the Quad will:

Country	Be beneficial to the region		Be complementary to ASEAN efforts		Force countries to choose sides		Provoke China		Threaten ASEAN centrality and compete with ASEAN-led mechanisms	
	2023	2024	2023	2024	2023	2024	2023	2024	2023	2024
ASEAN	31.0%	40.9%	37.8%	32.2%	10.4%	7.9%	6.8%	7.4%	13.9%	11.5%
BN	23.9%	27.3%	21.7%	35.1%	31.5%	9.1%	4.3%	10.4%	18.5%	18.2%
KH	22.7%	53.4%	27.3%	25.4%	11.4%	3.2%	4.5%	4.2%	34.1%	13.8%
ID	25.0%	38.1%	53.8%	40.4%	5.0%	7.5%	1.3%	4.2%	15.0%	9.8%
LA	42.9%	52.5%	31.0%	19.4%	14.3%	4.4%	2.4%	10.0%	9.5%	13.8%
MY	27.6%	35.1%	44.7%	34.7%	3.9%	9.3%	13.2%	6.7%	10.5%	14.2%
MM	31.4%	36.5%	37.2%	27.5%	14.0%	13.2%	12.8%	13.8%	4.7%	9.0%
PH	39.7%	42.3%	42.6%	42.3%	2.9%	4.7%	5.9%	4.2%	8.8%	6.5%
SG	28.8%	32.2%	33.6%	34.4%	11.6%	10.6%	9.6%	12.1%	16.4%	10.6%
TH	31.6%	39.3%	35.7%	27.4%	8.2%	12.4%	11.2%	6.5%	13.3%	14.4%
VN	36.6%	52.5%	50.5%	35.5%	1.1%	5.0%	3.2%	2.0%	8.6%	5.0%

VIEWS ON CHINA'S COMMUNITY WITH A SHARED FUTURE FOR MANKIND

In 2013, China proposed a vision of a “global community of common destiny”. Over the years, China added different global initiatives including the Belt and Road Initiative, the Global Development Initiative, the Global Security Initiative, and the Global Civilisation Initiative. These multilateral initiatives are part of China's vision of building a Community with a Shared Future for Mankind. In January 2024, seven ASEAN member states (Cambodia, Indonesia, Laos, Malaysia, Myanmar, Thailand, and Vietnam) signed on to China's “community of a shared future”.

The region is likely to embrace China's multiple initiatives to create a common future. 31.3% of the regional respondents say that China's vision of such a Community can be complementary to ASEAN's efforts while another 30.1% view the vision as positive and beneficial for Southeast Asia. A small percentage of 18.6% of ASEAN respondents say that the vision could be divisive and force countries to choose sides and another 13.1% fear that China's vision could threaten ASEAN centrality. 6.8% are deniers who say that China's initiatives are of no significance to their country.



Q30 Choose the statement that best resonates with your view: “China’s Community with a Shared Future for Mankind...”

Country	Is a vision that can be complementary to ASEAN's efforts	Is positive and beneficial for Southeast Asia	Could be a divisive vision and force countries to choose sides	Could threaten ASEAN centrality	Is of no significance to my country
ASEAN	31.3%	30.1%	18.6%	13.1%	6.8%
BN	40.3%	22.1%	15.6%	11.7%	10.4%
KH	31.2%	40.2%	13.2%	12.2%	3.2%
ID	36.2%	34.0%	12.5%	14.3%	3.0%
LA	18.8%	51.2%	13.8%	8.8%	7.5%
MY	48.4%	25.3%	12.9%	9.8%	3.6%
MM	14.8%	29.1%	18.5%	15.9%	21.7%
PH	23.3%	16.3%	33.0%	22.3%	5.1%
SG	39.9%	17.2%	24.5%	13.6%	4.8%
TH	26.4%	35.8%	22.4%	12.4%	3.0%
VN	33.5%	30.0%	20.0%	10.5%	6.0%

SECTION IV

US-China Rivalry and its Impact on Southeast Asia

46 - 54

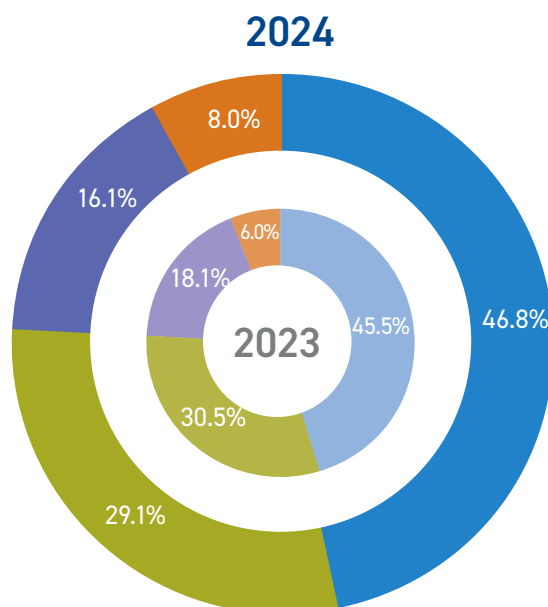
This section examines ASEAN's sentiments and options in the unfolding power competition in the region, especially the deepening rivalry between China and the United States.

ASSESSING ASEAN'S OPTIONS

In line with trends observed over the last three years, regional respondents continue to prioritise bolstering ASEAN's resilience and unity to counter pressure from the US-China rivalry, with 46.8% expressing this preference, making a slight uptick from last year's 45.5%. This inclination remains predominant across ASEAN countries, barring Myanmar. Notably, Thailand (61.7%) and Vietnam (58.5%) strongly advocate for this approach.

The second most favoured option is adhering to ASEAN's traditional stance of non-alignment between China and the US, resonating with 29.1% of respondents. This stance is particularly favoured by respondents from Myanmar (40.7%) and finds robust support from Malaysia (41.8%). This is followed by the option of ASEAN engaging "third parties" to broaden its strategic space and options (16.1%), notably championed by respondents from Cambodia (31.2%).

Conversely, the least popular option regionally involves ASEAN choosing one of the two major powers (8.0%), as remaining neutral is impractical. This choice finds minimal backing from respondents in Singapore (2.6%) but garners relatively higher levels of support from Cambodia and Myanmar (both at 13.8%) and the Philippines (12.6%).



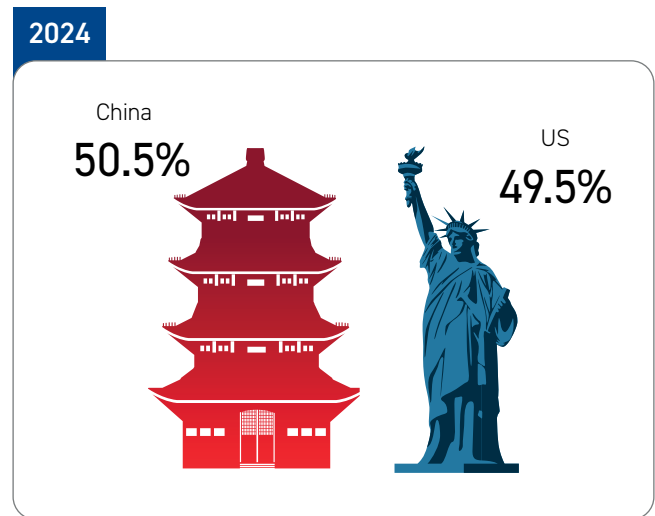
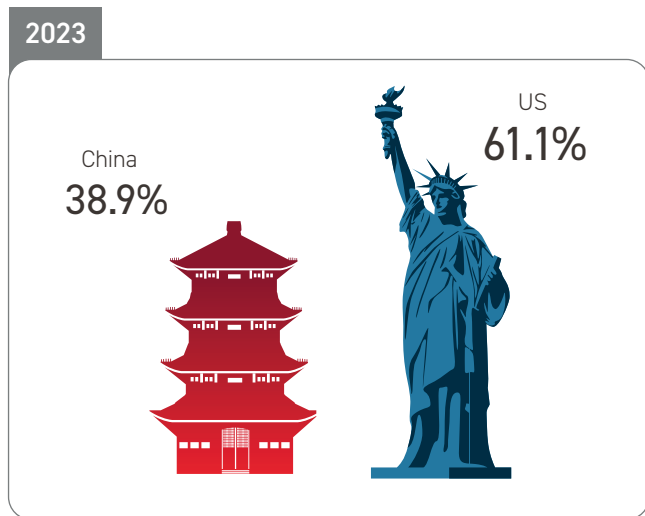
Q31 ASEAN is caught in the crossfire as Beijing and Washington compete for influence and leadership in Southeast Asia. How should ASEAN best respond?

Country	ASEAN has to choose between one of the two major powers as remaining neutral is impractical		ASEAN has to seek out "third parties" to broaden its strategic space and options		ASEAN should continue its position of not siding with China or the US		ASEAN should enhance its resilience and unity to fend off pressure from the two major powers	
	2023	2024	2023	2024	2023	2024	2023	2024
ASEAN	6.0%	8.0%	18.1%	16.1%	30.5%	29.1%	45.5%	46.8%
BN	8.3%	7.8%	21.7%	14.3%	32.5%	36.4%	37.5%	41.6%
KH	10.4%	13.8%	32.1%	31.2%	37.3%	21.7%	20.1%	33.3%
ID	6.6%	3.8%	14.0%	9.4%	33.1%	34.3%	46.3%	52.5%
LA	7.5%	12.5%	10.3%	18.1%	44.9%	18.1%	37.4%	51.2%
MY	4.8%	4.4%	12.9%	11.6%	37.9%	41.8%	44.4%	42.2%
MM	7.0%	13.8%	21.7%	18.5%	25.2%	40.7%	46.1%	27.0%
PH	4.0%	12.6%	17.2%	10.7%	19.2%	22.3%	59.6%	54.4%
SG	4.3%	2.6%	16.8%	16.1%	33.7%	35.9%	45.2%	45.4%
TH	2.1%	3.5%	17.4%	13.9%	23.6%	20.9%	56.9%	61.7%
VN	4.4%	5.5%	16.9%	17.0%	17.6%	19.0%	61.0%	58.5%

ASEAN'S FUTURE: CHINA OR THE UNITED STATES?

In a notable shift in sentiments, China has experienced a surge in popularity among respondents from Southeast Asia, climbing from 38.9% last year to 50.5% this year, edging ahead to become the preferred alignment choice in the region. This trend is particularly evident among respondents from Malaysia (75.1%), Indonesia (73.2%), Laos (70.6%), Brunei (70.1%), and Thailand (52.2%). Notably, Indonesia, Laos, and Malaysia which have benefitted significantly from China's Belt and Road Initiative (BRI) and robust trade and investment relations, witnessed a remarkable increase of more than 20 percentage points in their preference for China compared to 2023.

Conversely, the US has seen a decline in its popularity dropping from 61.1% last year to 49.5% this year. However, it still commands majority support from the Philippines (83.3%), Vietnam (79.0%), Singapore (61.5%), Myanmar (57.7%), and Cambodia (55.0%). Its backing from these countries has generally waned, except for the Philippines, which experienced a notable increase in confidence in the US, rising from 78.8% last year to an all-time high of 83.3% this year. This uptick follows the Philippines' closer alliance with the US in addressing China's aggression in the South China Sea.



Q32 If ASEAN were forced to align itself with one of the strategic rivals, which should it choose?

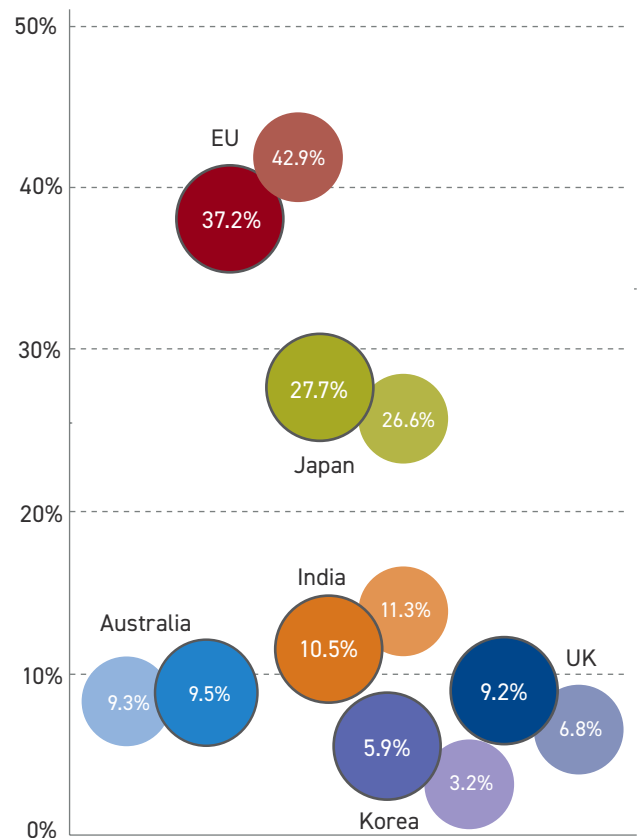
Country	China		The United States	
	2023	2024	2023	2024
ASEAN	38.9%	50.5%	61.1%	49.5%
BN	55.0%	70.1%	45.0%	29.9%
KH	26.9%	45.0%	73.1%	55.0%
ID	53.7%	73.2%	46.3%	26.8%
LA	41.1%	70.6%	58.9%	29.4%
MY	54.8%	75.1%	45.2%	24.9%
MM	32.2%	42.3%	67.8%	57.7%
PH	21.2%	16.7%	78.8%	83.3%
SG	38.9%	38.5%	61.1%	61.5%
TH	43.1%	52.2%	56.9%	47.8%
VN	22.1%	21.0%	77.9%	79.0%

BROADENING ASEAN'S STRATEGIC OPTIONS

Consistent with previous observations, the EU and Japan remain the primary options for the region in navigating the uncertainties stemming from the US-China strategic rivalry. The EU continues to hold its ground with 37.2% of the respondents opting for it, slightly down from 42.9% last year, while Japan secures 27.7% of the vote. India maintains its position in third with 10.5%, closely trailed by Australia (9.5%), the UK (9.2%), and the Republic of Korea (5.9%). India's rating has seen a slight dip from 11.3% last year while Australia, the UK, and the ROK have experienced an increase in support.

At the country level, the EU's dominance is acknowledged by all ASEAN countries except for Singapore (28.2%) and Brunei (20.8%). Notably, the EU receives particularly strong backing from Vietnam (61.5%) and Cambodia (45.0%). Conversely, Japan emerged as the preferred choice for respondents from Singapore (35.5%) and garnered favour from respondents in the Philippines (35.8%) and Indonesia (34.3%).

India, holding the third position, finds relatively higher support from Thailand (15.9%) and Malaysia (15.6%). Australia, on the other hand, gained significant backing from Brunei (19.5%) and Singapore (16.8%), while the UK and ROK received higher backing from Laos with 16.9% and 10.6% respectively.



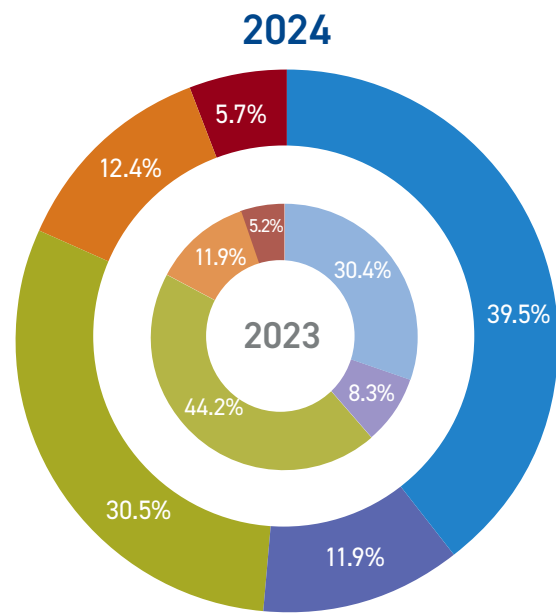
Q33 If ASEAN were to seek out “third parties” to hedge against the uncertainties of the US-China strategic rivalry, who is your preferred and trusted strategic partner for ASEAN?

Country	Australia		The European Union		India		Japan		Republic of Korea		The United Kingdom	
	2023	2024	2023	2024	2023	2024	2023	2024	2023	2024	2023	2024
ASEAN	9.3%	9.5%	42.9%	37.2%	11.3%	10.5%	26.6%	27.7%	3.2%	5.9%	6.8%	9.2%
BN	8.3%	19.5%	54.2%	20.8%	6.7%	7.8%	19.2%	31.2%	6.7%	6.5%	5.0%	14.3%
KH	1.5%	9.5%	79.9%	45.0%	6.0%	7.4%	9.0%	23.3%	0.0%	3.7%	3.7%	11.1%
ID	7.4%	8.3%	38.8%	34.3%	9.9%	10.2%	36.4%	34.3%	4.1%	9.4%	3.3%	3.4%
LA	16.8%	7.5%	42.1%	35.6%	13.1%	13.1%	18.7%	16.3%	1.9%	10.6%	7.5%	16.9%
MY	10.5%	7.1%	31.5%	29.8%	12.9%	15.6%	27.4%	28.9%	4.8%	8.4%	12.9%	10.2%
MM	12.2%	8.5%	14.8%	34.9%	21.7%	12.7%	39.1%	24.9%	1.7%	10.6%	10.4%	8.5%
PH	7.1%	7.0%	33.3%	39.1%	4.0%	2.8%	39.4%	35.8%	4.0%	4.2%	12.1%	11.2%
SG	18.3%	16.8%	38.9%	28.2%	10.6%	9.5%	25.5%	35.5%	1.9%	3.3%	4.8%	6.6%
TH	6.3%	5.0%	42.4%	43.3%	16.0%	15.9%	21.5%	26.4%	6.9%	2.0%	6.9%	7.5%
VN	4.4%	5.5%	52.9%	61.5%	11.8%	9.5%	29.4%	20.5%	0.0%	0.5%	1.5%	2.5%

THE FUTURE OF CHINA'S RELATIONS WITH REGIONAL COUNTRIES

There is a growing sense of optimism among Southeast Asians regarding their future relations with China. The proportion of respondents anticipating improvement has climbed from 38.7% to 51.4% this year. Notably, Indonesia (68.3%), Laos (68.2%), and Malaysia (65.3%) stand out as the most sanguine among all ASEAN countries, with a majority of their respondents anticipating enhanced relations with China.

At the same time, the number of neutral respondents has dwindled from 44.2% to 30.5% this year. Among ASEAN countries, Singapore (46.5%) and Myanmar (46.0%) hold the most reserved stance on their relations with China, anticipating a continuation of the status quo. Meanwhile, the level of pessimism towards China (18.1%) remains relatively steady compared to the findings last year. The Philippines emerged as the most cautious, with a significant 61.0% expressing apprehension, particularly amidst tensions with China in the South China Sea, followed by 29.1% of Myanmar respondents expressing scepticism, likely influenced by China's significant sway over the country.



Q34 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	
	2023	2024	2023	2024	2023	2024	2023	2024	2023	2024
ASEAN	5.2%	5.7%	11.9%	12.4%	44.2%	30.5%	30.4%	39.5%	8.3%	11.9%
BN	5.0%	5.2%	5.8%	10.4%	37.5%	31.2%	47.5%	40.3%	4.2%	13.0%
KH	1.5%	11.1%	2.2%	10.1%	18.7%	13.8%	43.3%	40.2%	34.3%	24.9%
ID	3.3%	0.4%	11.6%	4.9%	43.8%	26.4%	33.9%	58.5%	7.4%	9.8%
LA	0.0%	3.1%	7.5%	9.4%	64.5%	19.4%	24.3%	56.9%	3.7%	11.3%
MY	2.4%	1.8%	9.7%	5.8%	49.2%	27.1%	31.5%	50.2%	7.3%	15.1%
MM	20.0%	10.1%	28.7%	19.0%	28.7%	46.0%	17.4%	19.0%	5.2%	5.8%
PH	9.1%	17.7%	24.2%	43.3%	38.4%	24.7%	24.2%	12.1%	4.0%	2.3%
SG	1.0%	0.7%	9.1%	7.3%	59.1%	46.5%	24.0%	36.6%	6.7%	8.8%
TH	2.8%	0.5%	6.9%	6.0%	47.2%	34.3%	33.3%	43.8%	9.7%	15.4%
VN	6.6%	6.0%	13.2%	8.0%	55.1%	35.5%	24.3%	37.5%	0.7%	13.0%

Q35A What could potentially worsen your positive impression of China?

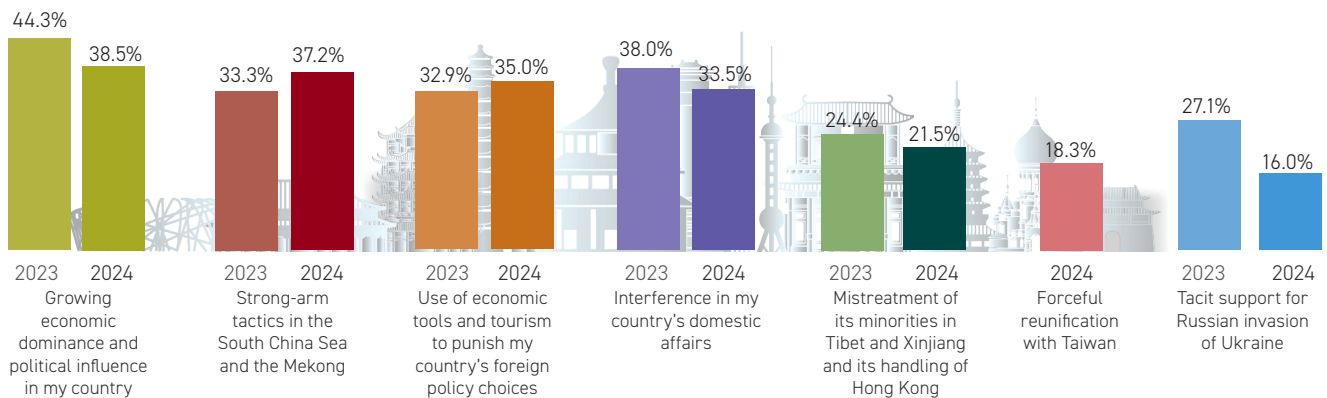
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Among those anticipating an improvement in their future relations with China, the most prevalent concern, cited by 38.5% of the respondents is China's growing economic dominance and political influence in their countries. This apprehension is particularly pronounced among respondents from Thailand (56.3%), Myanmar (53.2%), the Philippines (51.6%), and Cambodia (51.2%) with over half of the respondents from each country expressing this concern.

Following closely as the second top concern is China's strong-arm tactics in the South China Sea and the Mekong, with 37.2% expressing such worries, marking an increase from 33.3% last year. This apprehension resonates among respondents from Vietnam (55.4%), the Philippines (54.8%), and Malaysia (49.0%) – all claimant states in the South China Sea.

At third place, 35.0% of regional respondents express concerns over China's utilisation of economic tools and tourism to punish their countries for foreign policy decisions, particularly for Cambodia and Laos (both at 43.1%) and Singapore (41.1%).

One third of regional respondents (33.5%) feel that China's interference in their domestic affairs may worsen their positive impression of China. This sentiment is notably prevalent among respondents from Thailand (47.1%) and Singapore (40.3%). While China's mistreatment of its minorities and the handling of Hong Kong garnered only a fifth of the region's vote, it is the top concern for respondents from Brunei (46.3%).



1023 respondents who chose the "Improve" and "Improve Significantly" options in Q34

Country	China's use of economic tools and tourism to punish my country's foreign policy choices		China's mistreatment of its minorities in Tibet and Xinjiang and its handling of Hong Kong		China's strong-arm tactics in the South China Sea and the Mekong		China's tacit support for Russian invasion of Ukraine		China's growing economic dominance and political influence in my country		China's interference in my country's domestic affairs (including through social media and influence over the ethnic Chinese citizens of my country)		China's forceful reunification with Taiwan
	2023	2024	2023	2024	2023	2024	2023	2024	2023	2024	2023	2024	2024
ASEAN	32.9%	35.0%	24.4%	21.5%	33.3%	37.2%	27.1%	16.0%	44.3%	38.5%	38.0%	33.5%	18.3%
BN	9.7%	39.0%	21.0%	46.3%	66.1%	39.0%	61.3%	12.2%	27.4%	12.2%	14.5%	22.0%	29.3%
KH	21.2%	43.1%	26.0%	22.0%	19.2%	26.0%	32.7%	15.4%	52.9%	51.2%	48.1%	30.9%	11.4%
ID	24.0%	19.9%	42.0%	27.6%	36.0%	40.9%	14.0%	18.8%	44.0%	41.4%	40.0%	39.8%	11.6%
LA	43.3%	43.1%	16.7%	26.6%	20.0%	25.7%	26.7%	15.6%	36.7%	45.0%	56.7%	30.3%	13.8%
MY	27.1%	32.7%	35.4%	20.4%	52.1%	49.0%	16.7%	13.6%	50.0%	30.6%	18.8%	29.3%	24.5%
MM	26.9%	34.0%	19.2%	12.8%	7.7%	27.7%	26.9%	21.3%	61.5%	53.2%	57.7%	34.0%	17.0%
PH	28.6%	25.8%	17.9%	16.1%	32.1%	54.8%	35.7%	6.5%	50.0%	51.6%	35.7%	35.5%	9.7%
SG	56.3%	41.1%	17.2%	12.1%	34.4%	31.5%	25.0%	26.6%	21.9%	15.3%	45.3%	40.3%	33.1%
TH	41.9%	31.9%	16.1%	14.3%	27.4%	21.8%	17.7%	19.3%	62.9%	56.3%	33.9%	47.1%	9.2%
VN	50.0%	39.6%	32.4%	16.8%	38.2%	55.4%	14.7%	10.9%	35.3%	27.7%	29.4%	25.7%	23.8%

Q35B What can China do to improve relations with your country?

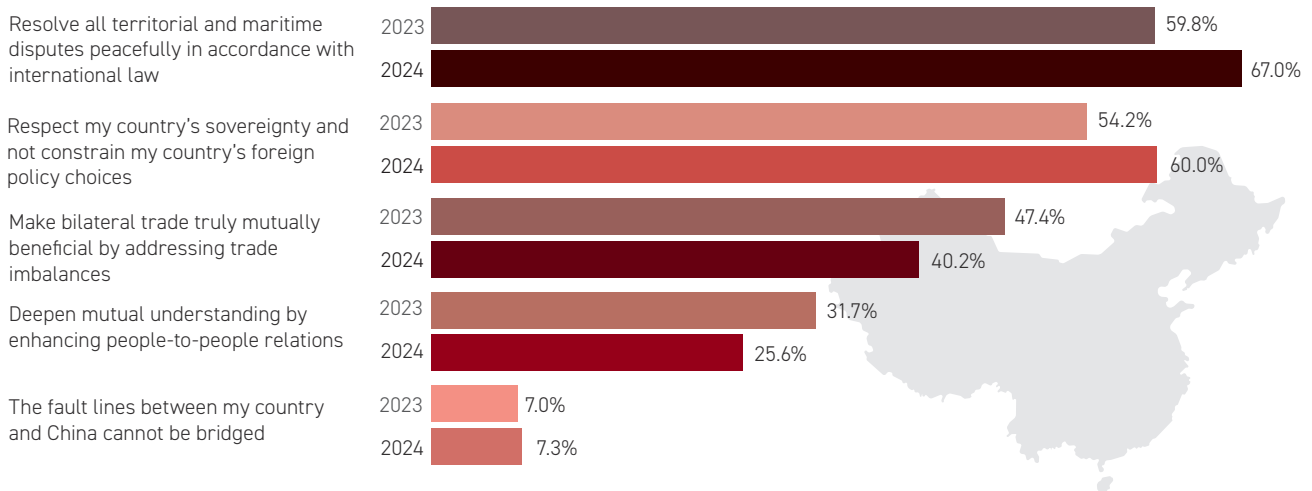
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Echoing findings from the previous year, the foremost desire among regional respondents holding a pessimistic view of relations is for China to resolve all territorial and maritime disputes peacefully in accordance with international law, with a notable increase from 59.8% to 67.0% this year. This preference is paramount among respondents from all ASEAN countries except for Laos, Myanmar, and Thailand, underscoring the enduring importance of territorial integrity within ASEAN. Notably, the Philippines witnessed a record-high number of respondents choosing this option (92.4%).

Following closely as the second top aspiration among regional respondents is the call for China to respect the sovereignty of regional countries and not constrain their foreign policy choices (60.0%).

This preference is particularly emphasised by respondents from the Philippines (84.7%) and is the top choice for respondents from Singapore (72.7%) (tied with the top option of resolving territorial disputes), Myanmar (67.3%), and Thailand (61.5%).

Trailing behind at 40.2% is the desire for China to foster mutually beneficial bilateral trade by addressing trade imbalances, with this concern being particularly pronounced among respondents from Laos (75.0%). Additionally, enhancing people-to-people relations to deepen mutual understanding remains significant for a quarter of the respondents (25.6%), except those from the Philippines (6.1%) and Vietnam (10.7%), who are less favourable towards this option.



352 respondents who chose the "Worsen" and "Worsen Significantly" options in Q34

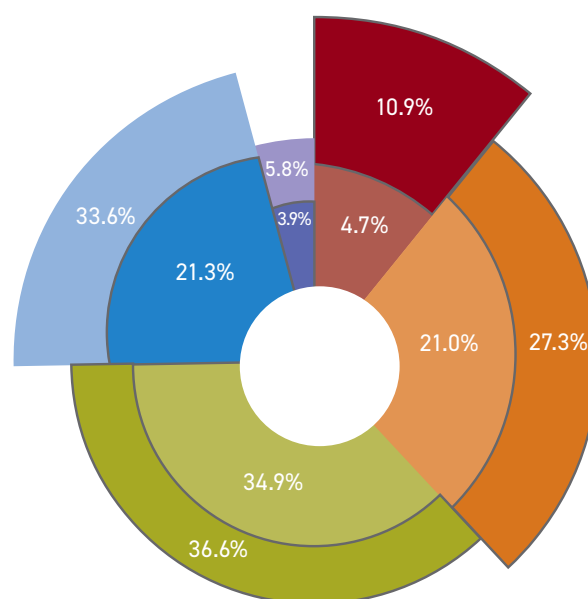
Country	China should resolve all territorial and maritime disputes peacefully in accordance with international law		China should make bilateral trade truly mutually beneficial by addressing trade imbalances		Deepen mutual understanding by enhancing people-to-people relations		China should respect my country's sovereignty and not constrain my country's foreign policy choices		The fault lines between my country and China cannot be bridged	
	2023	2024	2023	2024	2023	2024	2023	2024	2023	2024
ASEAN	59.8%	67.0%	47.4%	40.2%	31.7%	25.6%	54.2%	60.0%	7.0%	7.3%
BN	38.5%	66.7%	23.1%	41.7%	46.2%	33.3%	61.5%	58.3%	30.8%	0.0%
KH	20.0%	67.5%	80.0%	42.5%	40.0%	37.5%	60.0%	40.0%	0.0%	12.5%
ID	72.2%	78.6%	61.1%	50.0%	11.1%	21.4%	55.6%	50.0%	0.0%	0.0%
LA	12.5%	40.0%	50.0%	75.0%	75.0%	25.0%	37.5%	55.0%	25.0%	5.0%
MY	73.3%	70.6%	33.3%	41.2%	20.0%	29.4%	73.3%	52.9%	0.0%	5.9%
MM	60.7%	49.1%	75.0%	34.5%	51.8%	30.9%	12.5%	67.3%	0.0%	18.2%
PH	84.8%	92.4%	33.3%	14.5%	9.1%	6.1%	66.7%	84.7%	6.1%	2.3%
SG	85.7%	72.7%	23.8%	31.8%	23.8%	22.7%	61.9%	72.7%	4.8%	0.0%
TH	57.1%	53.8%	64.3%	38.5%	28.6%	38.5%	50.0%	61.5%	0.0%	7.7%
VN	92.6%	78.6%	29.6%	32.1%	11.1%	10.7%	63.0%	57.1%	3.7%	21.4%

ASSESSING US ENGAGEMENT IN THE REGION

The region is feeling a palpable difference in the way the Biden Administration engages with Southeast Asia compared to 2023.

38.2% of regional respondents are of the view that the US' engagement with Southeast Asia has decreased or decreased significantly, rising by 12.5 percentage points in negative sentiments towards the Biden Administration since 2023. Brunei (57.2%), Malaysia (48.9%) and Cambodia (44.4%) stand out among this group.

Only a quarter of regional respondents (25.2%) feel that the level of US engagement with the region has increased or increased significantly. This is a drop from 2023 where 39.4% shared more positive sentiments of US engagement in the region. More than a third of respondents (36.6%) feel that the engagement remains unchanged, a slight increase from 34.9% in 2023.



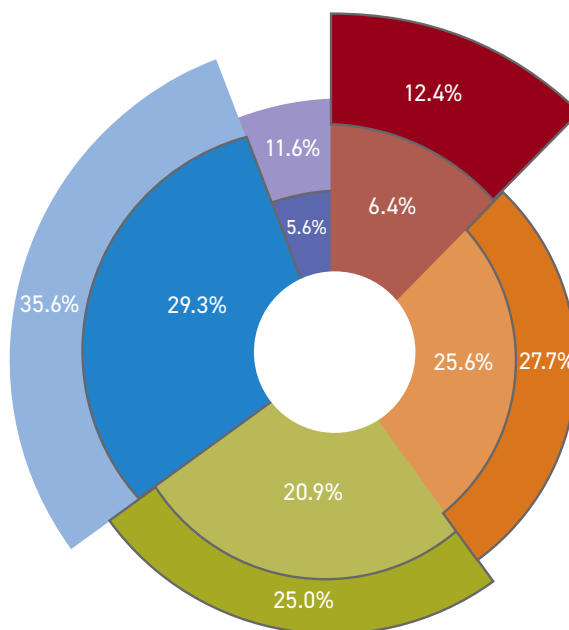
Q36 The level of US engagement with Southeast Asia under the Biden Administration has...

Country	Decreased Significantly		Decreased		Remain Unchanged		Increased		Increased Significantly	
	2023	2024	2023	2024	2023	2024	2023	2024	2023	2024
ASEAN	4.7%	10.9%	21.0%	27.3%	34.9%	36.6%	33.6%	21.3%	5.8%	3.9%
BN	2.5%	24.7%	9.2%	32.5%	39.2%	32.5%	42.5%	10.4%	6.7%	0.0%
KH	1.5%	25.4%	3.0%	19.0%	20.9%	28.6%	45.5%	21.2%	29.1%	5.8%
ID	5.0%	6.8%	16.5%	30.9%	47.1%	37.4%	29.8%	23.4%	1.7%	1.5%
LA	0.9%	10.0%	9.3%	30.0%	61.7%	43.8%	27.1%	13.8%	0.9%	2.5%
MY	1.6%	10.2%	25.0%	38.7%	36.3%	34.2%	33.9%	15.1%	3.2%	1.8%
MM	12.2%	9.5%	53.0%	21.7%	17.4%	46.6%	15.7%	19.0%	1.7%	3.2%
PH	4.0%	2.3%	17.2%	16.3%	31.3%	36.7%	44.4%	32.6%	3.0%	12.1%
SG	2.4%	4.8%	12.0%	21.6%	35.6%	35.9%	43.3%	33.7%	6.7%	4.0%
TH	6.9%	3.5%	26.4%	31.3%	34.0%	43.3%	27.8%	20.9%	4.9%	1.0%
VN	9.6%	12.0%	38.2%	31.0%	25.7%	27.0%	26.5%	22.5%	0.0%	7.5%

IS THE US A RELIABLE STRATEGIC PARTNER?

More Southeast Asians express little to no confidence in the US as a strategic partner and provider of regional security. 40.1% of the respondents feel that the US is not as reliable compared to 32.0% in 2023. At the country level, Indonesia (60.7%), Brunei (58.5%), and Malaysia (52.5%) appear to be feeling the effects of neglect.

34.9% of regional respondents view the US positively as a good security partner, a decrease of 12.3 percentage points compared to last year. At the country level, the Philippines (61.4%) and Vietnam (52.0%) stand out for their confidence in the US' security umbrella. This could be connected to the signing of the US-Philippines Enhanced Defence Cooperation Agreement (EDCA) in May 2023 and the upgrading of US-Vietnam relations to a Comprehensive Strategic Partnership in November 2023. Those who hold a neutral view about the US increased from 20.9% in 2023 to 25.0% in 2024.



Q37 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	
	2023	2024	2023	2024	2023	2024	2023	2024	2023	2024
ASEAN	6.4%	12.4%	25.6%	27.7%	20.9%	25.0%	35.6%	29.3%	11.6%	5.6%
BN	2.5%	24.7%	14.2%	33.8%	40.8%	28.6%	34.2%	11.7%	8.3%	1.3%
KH	1.5%	10.6%	13.4%	33.9%	8.2%	14.3%	49.3%	30.7%	27.6%	10.6%
ID	13.2%	29.4%	38.0%	31.3%	17.4%	18.5%	28.9%	18.1%	2.5%	2.6%
LA	0.9%	12.5%	11.2%	25.6%	39.3%	41.3%	47.7%	18.8%	0.9%	1.9%
MY	2.4%	15.6%	33.9%	36.9%	22.6%	25.8%	36.3%	20.0%	4.8%	1.8%
MM	21.7%	9.0%	15.7%	22.2%	9.6%	30.2%	11.3%	29.6%	41.7%	9.0%
PH	3.0%	2.3%	25.3%	22.8%	9.1%	13.5%	51.5%	49.8%	11.1%	11.6%
SG	6.7%	11.0%	36.5%	27.5%	17.8%	23.8%	32.7%	34.4%	6.3%	3.3%
TH	4.9%	5.5%	37.5%	28.4%	13.9%	24.4%	33.3%	36.8%	10.4%	5.0%
VN	6.6%	3.5%	30.1%	15.0%	30.1%	29.5%	30.9%	43.5%	2.2%	8.5%

Perceptions of Trust

55 - 67

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

CHINA

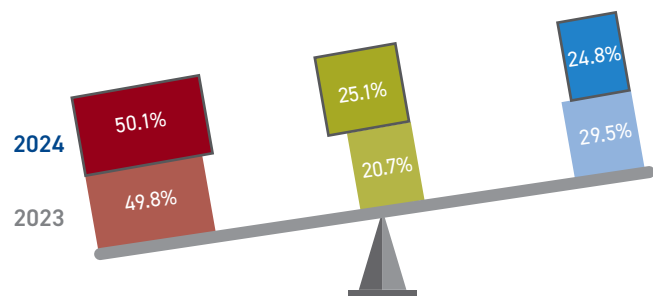
More than half of the respondents (50.1%) has either "little confidence" (34.8%) or "no confidence" (15.3%) in China to do "the right thing" in contributing to global peace, security, prosperity and governance. Only a quarter (24.8%) are either "confident" or "very confident" that China will contribute positively. The region's trust in China dropped by 4.7 percentage points while there is a slight increase in the distrust levels by 0.3 percentage points in 2024.

Among those who trust China, 53.1% attribute this to China's vast economic resources and strong political will to provide global leadership. 14.2% agree that China is a responsible stakeholder that respects and champions international law while 11.5% view that their countries' political culture and worldviews are compatible with China's and 11.3% agree that President Xi Jinping's 3rd term has made China stronger. Only 9.9% of the respondents agree that China's military power is an asset for global security.

Levels of distrust towards China are higher than levels of trust in all ASEAN countries, except for Laos. The distrust levels are most pronounced in the Philippines (71.1%), Myanmar (65.6%), Vietnam (56.5%), and Singapore (51.3%). Meanwhile, the share of distrust towards China is relatively low in Laos (27.5%). Interestingly, there is a significant

increase in the levels of distrust towards China among Cambodia and Brunei respondents this year by 30.1 and 21.2 percentage points respectively.

Among those who distrust China, 45.5% think that China's economic and military power can be used to threaten their countries' interests and sovereignty. This view is shared strongly in the Philippines (65.4%), Vietnam (64.6%), and Myanmar (51.6%). Among this group, 17.6% think that China is not a reliable power, followed by 15.4% who feel that China is distracted by its internal affairs and thus cannot focus on global concerns. Another 11.4% think that China's future stability has become more uncertain after the 20th Chinese Communist Party Congress.



Q38 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	
	2023	2024	2023	2024	2023	2024	2023	2024	2023	2024
ASEAN	19.0%	15.3%	30.8%	34.8%	20.7%	25.1%	25.3%	21.0%	4.2%	3.8%
BN	5.0%	9.1%	16.7%	33.8%	17.5%	41.6%	59.2%	13.0%	1.7%	2.6%
KH	2.2%	12.7%	16.4%	36.0%	27.6%	19.6%	43.3%	26.5%	10.4%	5.3%
ID	19.8%	9.4%	38.0%	39.6%	19.8%	17.0%	16.5%	30.6%	5.8%	3.4%
LA	0.9%	8.1%	15.9%	19.4%	39.3%	40.0%	40.2%	26.3%	3.7%	6.3%
MY	8.9%	8.4%	39.5%	32.0%	22.6%	27.6%	28.2%	27.1%	0.8%	4.9%
MM	53.9%	28.0%	26.1%	37.6%	12.2%	25.9%	7.0%	7.4%	0.9%	1.1%
PH	26.3%	28.8%	36.4%	42.3%	16.2%	14.9%	15.2%	13.0%	6.1%	0.9%
SG	15.9%	12.5%	40.4%	38.8%	15.9%	23.1%	21.2%	20.5%	6.7%	5.1%
TH	20.1%	11.4%	36.8%	36.3%	18.8%	18.4%	18.8%	30.3%	5.6%	3.5%
VN	36.8%	24.5%	41.9%	32.0%	16.9%	23.5%	3.7%	15.5%	0.7%	4.5%

Q39A Why do you trust China?

510 respondents who chose the "Confident" and "Very Confident" options in Q38

Country	China has vast economic resources and strong political will to provide global leadership		China is a responsible stakeholder that respects and champions international law		China's military power is an asset for global peace and security		My country's political culture and worldview are compatible with China's		The 20 th Chinese Communist Party Congress has made China stronger and more stable	President Xi Jinping's 3 rd term has made China stronger and more stable
	2023	2024	2023	2024	2023	2024	2023	2024	2023	2024
ASEAN	47.6%	53.1%	18.7%	14.2%	12.7%	9.9%	12.7%	11.5%	8.3%	11.3%
BN	39.7%	41.7%	39.7%	25.0%	9.6%	16.7%	5.5%	8.3%	5.5%	8.3%
KH	19.4%	46.7%	13.9%	11.7%	26.4%	10.0%	27.8%	8.3%	12.5%	23.3%
ID	81.5%	62.2%	11.1%	15.6%	7.4%	3.3%	0.0%	7.8%	0.0%	11.1%
LA	36.2%	50.0%	10.6%	21.2%	27.7%	11.5%	14.9%	5.8%	10.6%	11.5%
MY	69.4%	62.5%	13.9%	11.1%	11.1%	8.3%	0.0%	13.9%	5.6%	4.2%
MM	66.7%	31.3%	0.0%	6.3%	11.1%	25.0%	22.2%	12.5%	0.0%	25.0%
PH	38.1%	63.3%	23.8%	16.7%	19.0%	3.3%	19.0%	13.3%	0.0%	3.3%
SG	43.1%	54.3%	20.7%	12.9%	12.1%	11.4%	17.2%	12.9%	6.9%	8.6%
TH	48.6%	58.8%	20.0%	14.7%	2.9%	4.4%	20.0%	14.7%	8.6%	7.4%
VN	33.3%	60.0%	33.3%	7.5%	0.0%	5.0%	0.0%	17.5%	33.3%	10.0%

Q39B Why do you distrust China?

1016 respondents who chose the "Little Confidence" and "No Confidence" options in Q38

Country	China's economic and military power could be used to threaten my country's interests and sovereignty		China's future stability has become more uncertain after the 20 th Chinese Communist Party Congress		I am concerned that China is distracted with its internal affairs and thus cannot focus on global concerns and issues		My country's political culture and worldview are incompatible with China's		I do not consider China a responsible or reliable power	
	2023	2024	2023	2024	2023	2024	2023	2024	2023	2024
ASEAN	41.4%	45.5%	12.7%	11.4%	11.3%	15.4%	7.9%	10.1%	26.6%	17.6%
BN	23.1%	48.5%	26.9%	9.1%	15.4%	27.3%	15.4%	6.1%	19.2%	9.1%
KH	44.0%	19.6%	20.0%	25.0%	16.0%	29.3%	4.0%	12.0%	16.0%	14.1%
ID	35.7%	42.3%	14.3%	10.8%	12.9%	14.6%	15.7%	16.2%	21.4%	16.2%
LA	33.3%	36.4%	11.1%	18.2%	11.1%	15.9%	5.6%	18.2%	38.9%	11.4%
MY	41.7%	46.2%	20.0%	9.9%	15.0%	16.5%	8.3%	18.7%	15.0%	8.8%
MM	31.5%	51.6%	3.3%	4.8%	5.4%	6.5%	5.4%	8.1%	54.3%	29.0%
PH	62.9%	65.4%	8.1%	7.2%	4.8%	5.2%	8.1%	6.5%	16.1%	15.7%
SG	35.0%	35.0%	10.3%	13.6%	11.1%	14.3%	10.3%	5.7%	33.3%	31.4%
TH	41.5%	45.8%	8.5%	13.5%	15.9%	17.7%	3.7%	5.2%	30.5%	17.7%
VN	65.4%	64.6%	4.7%	1.8%	5.6%	7.1%	2.8%	4.4%	21.5%	22.1%

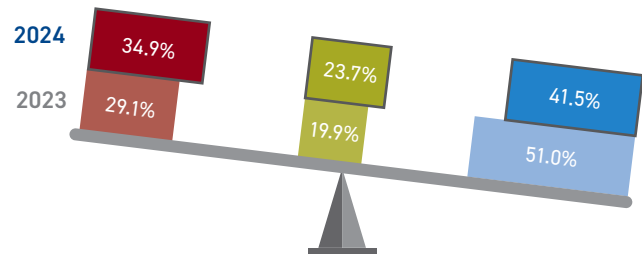
THE EUROPEAN UNION

Although the region's levels of trust towards the EU remains high (41.5%), the trust rating has significantly dropped by 9.5 percentage points and the distrust levels increased by 5.8 percentage points this year. The highest levels of trust towards the EU are shared strongly by respondents from the Philippines (63.2%), Vietnam (62.0%), and Thailand (48.3%). There is a sharp fall in the trust level among Cambodia respondents from 86.6% in 2023 to 47.1% this year. The trust levels towards the EU outstripped distrust levels in six ASEAN countries, with the exception of Brunei, Indonesia, Malaysia, and Singapore.

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 (31.7%). This view is more pronounced in Thailand (44.3%), Malaysia (36.6%), Brunei (35.7%), Laos (34.5%), Singapore (34.3%), and the Philippines (33.1%). Among this cohort, 28.3% think that the EU is a responsible stakeholder that respects and champions international law.

A quarter of the region (25.8%) think that the EU has vast economic resources and the political will to provide global leadership.

In the group of EU sceptics, 28.7% express concern that the EU is distracted with its internal affairs and thus cannot focus on global concerns and issues. This view is shared strongly by respondents from the Philippines and Singapore (both at 40.7%) and Vietnam (40.0%).



Q40 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	
	2023	2024	2023	2024	2023	2024	2023	2024	2023	2024
ASEAN	5.2%	7.1%	23.9%	27.8%	19.9%	23.7%	40.3%	35.7%	10.7%	5.8%
BN	3.3%	10.4%	15.8%	36.4%	48.3%	35.1%	21.7%	16.9%	10.8%	1.3%
KH	0.7%	7.9%	10.4%	29.1%	2.2%	15.9%	36.6%	40.2%	50.0%	6.9%
ID	12.4%	14.0%	35.5%	40.0%	14.9%	14.7%	33.1%	27.2%	4.1%	4.2%
LA	0.9%	8.8%	5.6%	16.9%	28.0%	40.0%	63.6%	27.5%	1.9%	6.9%
MY	4.0%	9.8%	27.4%	32.9%	21.0%	25.8%	40.3%	28.9%	7.3%	2.7%
MM	15.7%	5.3%	46.1%	27.0%	21.7%	26.5%	14.8%	34.9%	1.7%	6.3%
PH	2.0%	2.8%	22.2%	22.3%	14.1%	11.6%	51.5%	54.4%	10.1%	8.8%
SG	5.8%	5.5%	27.9%	37.7%	15.4%	19.4%	41.8%	33.3%	9.1%	4.0%
TH	2.8%	4.5%	26.4%	22.4%	18.1%	24.9%	44.4%	43.3%	8.3%	5.0%
VN	4.4%	2.0%	21.3%	13.0%	15.4%	23.0%	55.1%	50.5%	3.7%	11.5%

Q41A Why do you trust the EU?

849 respondents who chose the "Confident" and "Very Confident" options in Q40

Country	I respect Europe and admire its civilisation and culture		My country's political culture and worldview are compatible with the EU's		The EU has vast economic resources and the political will to provide global leadership		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	
	2023	2024	2023	2024	2023	2024	2023	2024	2023	2024
ASEAN	5.4%	9.4%	6.4%	4.8%	19.1%	25.8%	30.9%	28.3%	38.1%	31.7%
BN	10.3%	21.4%	17.9%	0.0%	15.4%	14.3%	12.8%	28.6%	43.6%	35.7%
KH	8.6%	7.9%	3.4%	6.7%	7.8%	42.7%	33.6%	14.6%	46.6%	28.1%
ID	4.4%	9.6%	2.2%	3.6%	24.4%	25.3%	28.9%	31.3%	40.0%	30.1%
LA	4.3%	12.7%	7.1%	9.1%	20.0%	25.5%	25.7%	18.2%	42.9%	34.5%
MY	5.1%	2.8%	8.5%	2.8%	11.9%	28.2%	30.5%	29.6%	44.1%	36.6%
MM	0.0%	20.5%	0.0%	0.0%	26.3%	26.9%	47.4%	33.3%	26.3%	19.2%
PH	8.2%	7.4%	6.6%	5.9%	29.5%	31.6%	24.6%	22.1%	31.1%	33.1%
SG	4.7%	5.9%	5.7%	9.8%	12.3%	7.8%	44.3%	42.2%	33.0%	34.3%
TH	0.0%	2.1%	9.2%	7.2%	19.7%	20.6%	28.9%	25.8%	42.1%	44.3%
VN	8.8%	3.2%	3.8%	3.2%	23.8%	34.7%	32.5%	37.9%	31.3%	21.0%

Q41B Why do you distrust the EU?

703 respondents who chose the "Little Confidence" and "No Confidence" options in Q40

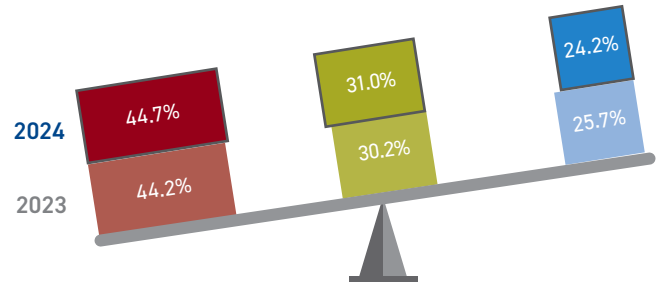
Country	I am concerned that the EU is distracted with its internal affairs and thus cannot focus on global concerns and issues		My country's political culture and worldview are incompatible with the EU's		The EU does not have the capacity or political will for global leadership		The EU's stance on environment, 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	
	2023	2024	2023	2024	2023	2024	2023	2024	2023	2024
ASEAN	29.4%	28.7%	9.2%	16.5%	33.4%	28.2%	14.5%	11.1%	13.5%	15.5%
BN	30.4%	25.0%	13.0%	13.9%	34.8%	22.2%	8.7%	8.3%	13.0%	30.6%
KH	26.7%	21.4%	13.3%	20.0%	46.7%	35.7%	6.7%	14.3%	6.7%	8.6%
ID	20.7%	24.5%	10.3%	14.7%	22.4%	21.0%	29.3%	16.1%	17.2%	23.8%
LA	28.6%	19.5%	0.0%	24.4%	28.6%	26.8%	14.3%	17.1%	28.6%	12.2%
MY	25.6%	27.1%	7.7%	8.3%	25.6%	33.3%	23.1%	12.5%	17.9%	18.8%
MM	38.0%	14.8%	18.3%	23.0%	15.5%	34.4%	9.9%	13.1%	18.3%	14.8%
PH	37.5%	40.7%	16.7%	18.5%	16.7%	14.8%	25.0%	16.7%	4.2%	9.3%
SG	25.7%	40.7%	1.4%	5.1%	52.9%	39.0%	5.7%	3.4%	14.3%	11.9%
TH	40.5%	33.3%	2.4%	16.7%	31.0%	18.5%	16.7%	9.3%	9.5%	22.2%
VN	20.0%	40.0%	8.6%	20.0%	60.0%	36.7%	5.7%	0.0%	5.7%	3.3%

INDIA

The distrust levels in India remain high this year (44.7%). The trust levels also saw a slight decline of 1.5%. Doubts about India are elevated, especially in Indonesia (62.2%), Cambodia (57.2%), Singapore (56.4%), Malaysia (55.5%), and Brunei (54.6%). Meanwhile, Vietnam, Thailand, and Laos are the only countries whose levels of trust outstripped the levels of distrust towards India.

(57.1%), Thailand (48.4%), Laos (46.5%), and Cambodia (43.5%). Among this group, more than a quarter (26.4%) feel that India is distracted with its internal and sub-continental affairs and thus cannot focus on global concerns and issues.

Of the cohort that trusts India, 27.4% (slight increase from 25.4% in 2023) believe that it is a responsible stakeholder that respects and champions international law. This view is shared strongly in Brunei (75.0%), Vietnam (34.1%), Thailand (29.2%), and Singapore (27.7%). About a fifth (22.4%) of this cohort agree that India has vast economic resources and the political will to provide global leadership.



Among those who distrust India, 40.6% believe that India does not have the capacity or political will for global leadership. This view is more pronounced in Vietnam

Q42 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	
	2023	2024	2023	2024	2023	2024	2023	2024	2023	2024
ASEAN	12.1%	14.2%	32.1%	30.5%	30.2%	31.0%	22.7%	20.5%	3.0%	3.7%
BN	5.8%	23.4%	50.0%	31.2%	10.8%	35.1%	25.0%	7.8%	8.3%	2.6%
KH	14.2%	19.6%	38.1%	37.6%	38.1%	23.3%	8.2%	15.3%	1.5%	4.2%
ID	19.8%	27.9%	33.9%	34.3%	22.3%	18.5%	21.5%	17.0%	2.5%	2.3%
LA	0.9%	8.1%	4.7%	18.8%	66.4%	45.0%	27.1%	21.9%	0.9%	6.3%
MY	8.9%	17.3%	30.6%	38.2%	35.5%	27.6%	21.0%	13.8%	4.0%	3.1%
MM	36.5%	13.8%	29.6%	28.0%	22.6%	38.1%	9.6%	17.5%	1.7%	2.6%
PH	3.0%	3.7%	35.4%	36.3%	21.2%	24.2%	35.4%	32.6%	5.1%	3.3%
SG	14.9%	19.0%	35.6%	37.4%	25.5%	26.4%	21.2%	14.3%	2.9%	2.9%
TH	12.5%	6.0%	32.6%	25.9%	27.8%	35.8%	25.0%	30.3%	2.1%	2.0%
VN	4.4%	3.5%	30.1%	17.5%	31.6%	36.5%	33.1%	34.5%	0.7%	8.0%

Q43A Why do you trust India?

491 respondents who chose the "Confident" and "Very Confident" options in Q42

Country	I respect India and admire its civilisation and culture		India has vast economic resources and the political will to provide global leadership		India is a responsible stakeholder that respects and champions international law		India's military power is an asset for global peace and security		My country's political culture and worldview are compatible with India's	
	2023	2024	2023	2024	2023	2024	2023	2024	2023	2024
ASEAN	18.2%	21.2%	22.0%	22.4%	25.4%	27.4%	18.2%	13.7%	16.2%	15.2%
BN	17.5%	0.0%	2.5%	12.5%	35.0%	75.0%	27.5%	12.5%	17.5%	0.0%
KH	7.7%	24.3%	38.5%	27.0%	15.4%	10.8%	38.5%	24.3%	0.0%	13.5%
ID	20.7%	21.6%	31.0%	25.5%	31.0%	23.5%	3.4%	9.8%	13.8%	19.6%
LA	33.3%	15.6%	3.3%	35.6%	10.0%	13.3%	33.3%	15.6%	20.0%	20.0%
MY	29.0%	26.3%	32.3%	28.9%	19.4%	15.8%	9.7%	7.9%	9.7%	21.1%
MM	7.7%	23.7%	30.8%	15.8%	15.4%	26.3%	7.7%	15.8%	38.5%	18.4%
PH	22.5%	28.6%	30.0%	20.8%	25.0%	18.2%	12.5%	14.3%	10.0%	18.2%
SG	22.0%	38.3%	22.0%	14.9%	34.0%	27.7%	10.0%	8.5%	12.0%	10.6%
TH	10.3%	13.8%	20.5%	24.6%	25.6%	29.2%	17.9%	10.8%	25.6%	21.5%
VN	10.9%	20.0%	8.7%	18.8%	43.5%	34.1%	21.7%	17.6%	15.2%	9.4%

Q43B Why do you distrust India?

908 respondents who chose the "Little Confidence" and "No Confidence" options in Q42

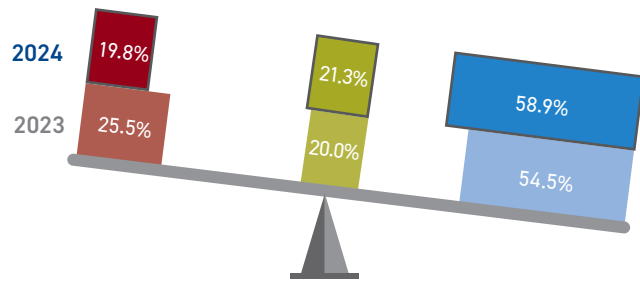
Country	I am concerned that India is distracted with its internal and sub-continental affairs and thus cannot focus on global concerns and issues		India does not have the capacity or political will for global leadership		India's economic and military power could be used to threaten my country's interests and sovereignty		My country's political culture and worldview are incompatible with India's		I do not consider India a responsible or reliable power	
	2023	2024	2023	2024	2023	2024	2023	2024	2023	2024
ASEAN	34.6%	26.4%	33.6%	40.6%	6.3%	2.9%	4.8%	10.0%	20.7%	20.1%
BN	76.1%	28.6%	1.5%	31.0%	9.0%	2.4%	9.0%	16.7%	4.5%	21.4%
KH	4.3%	16.7%	45.7%	43.5%	2.9%	8.3%	1.4%	11.1%	45.7%	20.4%
ID	30.8%	18.2%	44.6%	40.0%	3.1%	2.4%	3.1%	12.7%	18.5%	26.7%
LA	33.3%	16.3%	16.7%	46.5%	33.3%	2.3%	0.0%	16.3%	16.7%	18.6%
MY	28.6%	34.4%	46.9%	30.4%	2.0%	1.6%	4.1%	8.0%	18.4%	25.6%
MM	22.4%	22.8%	11.8%	39.2%	2.6%	6.3%	9.2%	7.6%	53.9%	24.1%
PH	44.7%	32.6%	34.2%	34.9%	2.6%	3.5%	7.9%	7.0%	10.5%	22.1%
SG	30.5%	38.3%	48.6%	35.1%	0.0%	0.0%	2.9%	0.6%	18.1%	26.0%
TH	35.4%	25.0%	47.7%	48.4%	3.1%	0.0%	1.5%	12.5%	12.3%	14.1%
VN	40.4%	31.0%	38.3%	57.1%	4.3%	2.4%	8.5%	7.1%	8.5%	2.4%

JAPAN

Japan remains the most trusted major power in the region, with an overall trust level of 58.9%, an increase of 4.4% compared to 2023. The distrust level also saw a significant decrease by 5.7% this year. Japan is most trusted in the Philippines (82.3%), Vietnam (72.0%), Thailand (65.1%), and Cambodia (61.9%). The largest improvement in trust towards Japan is found in Cambodia, with an increase of 43.2% compared to last year.

Among those who believe in Japan, 36.5% (a decline from 41.0% in 2023) think that Japan is a responsible stakeholder that respects and champions international law. This perception is widely shared among respondents from Singapore (57.4%), Myanmar (40.4%), and Vietnam (40.3%). More than a quarter of this cohort (27.7%) believes that Japan has vast economic resources and the political will to provide global leadership, particularly among respondents from Cambodia (42.7%), Laos (42.4%), the Philippines (33.9%), Indonesia (33.1%), and Vietnam (29.2%).

Among the cohort who distrusts Japan, more than a third (35.1%) believe that Japan is distracted with its internal affairs and relations with Northeast Asian neighbours and thus cannot focus on global concerns. This is true among respondents from Thailand (48.1%), Brunei (47.1%), Singapore (38.6%), the Philippines (38.1%), and Malaysia (37.3%). In this cohort, 33.2% think that Japan does not have the capacity or political will for global leadership, most pronounced in Vietnam (50.0%) and Myanmar respondents (40.4%).



Q44 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	
	2023	2024	2023	2024	2023	2024	2023	2024	2023	2024
ASEAN	7.6%	3.3%	17.9%	16.5%	20.0%	21.3%	42.2%	44.9%	12.3%	14.0%
BN	2.5%	1.3%	10.8%	20.8%	7.5%	26.0%	66.7%	33.8%	12.5%	18.2%
KH	41.0%	5.8%	9.7%	19.0%	30.6%	13.2%	14.2%	43.9%	4.5%	18.0%
ID	4.1%	2.6%	27.3%	26.0%	14.9%	13.2%	41.3%	50.6%	12.4%	7.5%
LA	0.0%	8.1%	4.7%	8.1%	42.1%	42.5%	48.6%	36.9%	4.7%	4.4%
MY	3.2%	3.6%	18.5%	22.7%	24.2%	22.2%	41.1%	42.2%	12.9%	9.3%
MM	13.0%	2.1%	40.0%	25.4%	12.2%	22.8%	32.2%	36.0%	2.6%	13.8%
PH	1.0%	0.9%	15.2%	8.8%	8.1%	7.9%	44.4%	52.1%	31.3%	30.2%
SG	6.3%	4.8%	22.6%	16.1%	17.3%	24.9%	42.8%	45.4%	11.1%	8.8%
TH	0.7%	2.0%	18.1%	11.4%	23.6%	21.4%	43.8%	53.2%	13.9%	11.9%
VN	4.4%	2.0%	11.8%	7.0%	19.1%	19.0%	47.1%	54.5%	17.6%	17.5%

Q45A Why do you trust Japan?

1187 respondents who chose the "Confident" and "Very Confident" options in Q44

Country	I respect Japan and admire its civilisation and culture		Japan has vast economic resources and the political will to provide global leadership		Japan is a responsible stakeholder that respects and champions international law		Japan's military power is an asset for global peace and security		My country's political culture and worldview are compatible with Japan's	
	2023	2024	2023	2024	2023	2024	2023	2024	2023	2024
ASEAN	17.0%	21.1%	26.4%	27.7%	41.0%	36.5%	7.2%	5.8%	8.4%	8.9%
BN	5.3%	35.0%	30.5%	25.0%	41.1%	35.0%	13.7%	2.5%	9.5%	2.5%
KH	4.0%	19.7%	48.0%	42.7%	36.0%	28.2%	8.0%	1.7%	4.0%	7.7%
ID	12.3%	12.3%	32.3%	33.1%	49.2%	35.1%	1.5%	8.4%	4.6%	11.0%
LA	40.4%	12.1%	17.5%	42.4%	10.5%	27.3%	8.8%	7.6%	22.8%	10.6%
MY	26.9%	25.9%	23.9%	23.3%	37.3%	38.8%	6.0%	4.3%	6.0%	7.8%
MM	27.5%	29.8%	22.5%	18.1%	37.5%	40.4%	7.5%	3.2%	5.0%	8.5%
PH	18.7%	20.3%	24.0%	33.9%	38.7%	33.3%	12.0%	8.5%	6.7%	4.0%
SG	10.7%	14.9%	13.4%	10.1%	62.5%	57.4%	5.4%	4.7%	8.0%	12.8%
TH	6.0%	25.2%	24.1%	19.1%	49.4%	29.0%	6.0%	8.4%	14.5%	18.3%
VN	18.2%	16.0%	27.3%	29.2%	47.7%	40.3%	3.4%	9.0%	3.4%	5.6%

Q45B Why do you distrust Japan?

400 respondents who chose the "Little Confidence" and "No Confidence" options in Q44

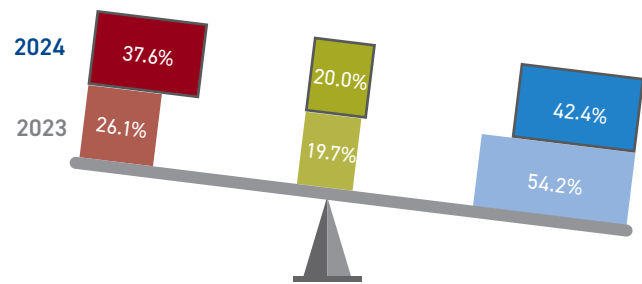
Country	I am concerned that Japan is distracted with its internal affairs and relations with its Northeast Asian neighbours (i.e. China, Korea and Taiwan), and thus cannot focus on global concerns and issues		Japan does not have the capacity or political will for global leadership		Japan's economic and military power could be used to threaten my country's interests and sovereignty		My country's political culture and worldview are incompatible with Japan's		I do not consider Japan a responsible or reliable power	
	2023	2024	2023	2024	2023	2024	2023	2024	2023	2024
ASEAN	38.6%	35.1%	32.5%	33.2%	7.7%	7.9%	8.1%	13.8%	13.2%	10.0%
BN	56.3%	47.1%	18.8%	29.4%	6.3%	5.9%	12.5%	11.8%	6.3%	5.9%
KH	1.5%	21.3%	85.3%	27.7%	0.0%	14.9%	1.5%	17.0%	11.8%	19.1%
ID	47.4%	32.9%	31.6%	32.9%	7.9%	10.5%	2.6%	10.5%	10.5%	13.2%
LA	40.0%	30.8%	0.0%	34.6%	20.0%	3.8%	20.0%	15.4%	20.0%	15.4%
MY	40.7%	37.3%	22.2%	32.2%	7.4%	6.8%	7.4%	8.5%	22.2%	15.3%
MM	36.1%	34.6%	14.8%	40.4%	4.9%	1.9%	21.3%	15.4%	23.0%	7.7%
PH	25.0%	38.1%	25.0%	9.5%	25.0%	9.5%	12.5%	42.9%	12.5%	0.0%
SG	43.3%	38.6%	38.3%	42.1%	1.7%	7.0%	3.3%	1.8%	13.3%	10.5%
TH	59.3%	48.1%	29.6%	33.3%	3.7%	7.4%	0.0%	3.7%	7.4%	7.4%
VN	36.4%	22.2%	59.1%	50.0%	0.0%	11.1%	0.0%	11.1%	4.5%	5.6%

THE UNITED STATES

The perception of trust towards the US continues to be strong, although it saw a significant decrease from 54.2% last year to 42.4% this year. There is a significant rise in the levels of distrust from 26.1% in 2023 to 37.6% this year.

Confidence in the US is shared widely among respondents from the Philippines (74.0%), Vietnam (66.5%), Cambodia (56.6%), Myanmar (49.2%), and Thailand (46.7%). The most significant decrease in trust towards the US is found in Laos, declining from 64.4% in 2023 to 29.4% this year. Meanwhile, the level of distrust increased significantly in Brunei from 13.3% in 2023 to 61.1% this year.

Among those who trust the US, 45.0% believe that the US has vast economic resources and the political will to provide global leadership. This is an increase from 39.2% in 2023. This is true particularly in Laos (59.6%), Vietnam (51.1%), Thailand (50.0%), Malaysia (50.0%), and Cambodia (46.7%). Meanwhile, among the US sceptics, 27.0% of them believe that the US is distracted with its internal affairs and thus cannot focus on global concerns and issues.



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	
	2023	2024	2023	2024	2023	2024	2023	2024	2023	2024
ASEAN	6.5%	14.1%	19.6%	23.5%	19.7%	20.0%	36.1%	32.0%	18.1%	10.4%
BN	2.5%	32.5%	10.8%	28.6%	41.7%	22.1%	35.0%	11.7%	10.0%	5.2%
KH	3.0%	7.4%	6.7%	21.7%	5.2%	14.3%	26.1%	47.1%	59.0%	9.5%
ID	9.9%	34.3%	40.5%	27.9%	16.5%	14.0%	25.6%	19.2%	7.4%	4.5%
LA	0.9%	13.1%	4.7%	20.0%	29.9%	37.5%	57.9%	23.8%	6.5%	5.6%
MY	8.1%	20.9%	30.6%	36.0%	19.4%	20.0%	37.1%	20.0%	4.8%	3.1%
MM	15.7%	5.3%	14.8%	23.8%	11.3%	21.7%	13.9%	34.9%	44.3%	14.3%
PH	4.0%	2.3%	16.2%	14.4%	10.1%	9.3%	52.5%	49.8%	17.2%	24.2%
SG	7.2%	13.6%	31.3%	27.8%	17.3%	20.5%	33.7%	31.1%	10.6%	7.0%
TH	9.0%	8.5%	25.7%	23.9%	16.7%	20.9%	35.4%	34.3%	13.2%	12.4%
VN	5.1%	3.5%	14.7%	10.5%	28.7%	19.5%	43.4%	48.5%	8.1%	18.0%

Q47A Why do you trust the US?

865 respondents who chose the "Confident" and "Very Confident" options in Q46

Country	I respect the US and admire its civilisation and culture		My country's political culture and worldview are compatible with the US's		The US has vast economic resources and the political will to provide global leadership		The US is a responsible stakeholder that respects and champions international law		The US's military power is an asset for global peace and security	
	2023	2024	2023	2024	2023	2024	2023	2024	2023	2024
ASEAN	5.4%	6.1%	7.3%	6.4%	39.2%	45.0%	18.2%	14.4%	30.0%	28.0%
BN	5.6%	7.7%	13.0%	15.4%	16.7%	38.5%	44.4%	7.7%	20.4%	30.8%
KH	3.5%	11.2%	3.5%	2.8%	20.2%	46.7%	17.5%	20.6%	55.3%	18.7%
ID	2.5%	3.2%	7.5%	7.9%	52.5%	41.3%	12.5%	20.6%	25.0%	27.0%
LA	5.8%	4.3%	7.2%	6.4%	31.9%	59.6%	18.8%	4.3%	36.2%	25.5%
MY	13.5%	7.7%	5.8%	7.7%	50.0%	50.0%	11.5%	7.7%	19.2%	26.9%
MM	3.0%	9.7%	3.0%	4.3%	44.8%	38.7%	10.4%	25.8%	38.8%	21.5%
PH	7.2%	6.3%	17.4%	8.8%	39.1%	42.8%	13.0%	15.1%	23.2%	27.0%
SG	5.4%	5.8%	5.4%	6.7%	38.0%	31.7%	21.7%	16.3%	29.3%	39.4%
TH	2.9%	1.1%	8.6%	2.1%	41.4%	50.0%	22.9%	12.8%	24.3%	34.0%
VN	4.3%	3.8%	1.4%	2.3%	57.1%	51.1%	8.6%	13.5%	28.6%	29.3%

Q47B Why do you distrust the US?

745 respondents who chose the "Little Confidence" and "No Confidence" options in Q46

Country	I am concerned that the US is distracted with its internal affairs and thus cannot focus on global concerns and issues		My country's political culture and worldview are incompatible with the US's		The US does not have the capacity or political will for global leadership		The US's 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	
	2023	2024	2023	2024	2023	2024	2023	2024	2023	2024
ASEAN	30.7%	27.0%	12.5%	13.2%	6.0%	9.6%	25.6%	25.6%	25.2%	24.6%
BN	37.5%	21.3%	25.0%	19.1%	12.5%	6.4%	6.3%	19.1%	18.8%	34.0%
KH	30.8%	25.5%	15.4%	14.5%	0.0%	16.4%	7.7%	27.3%	46.2%	16.4%
ID	16.4%	14.5%	11.5%	13.9%	6.6%	7.3%	42.6%	41.2%	23.0%	23.0%
LA	33.3%	24.5%	16.7%	15.1%	16.7%	17.0%	16.7%	24.5%	16.7%	18.9%
MY	18.8%	23.4%	8.3%	11.7%	6.3%	7.0%	29.2%	29.7%	37.5%	28.1%
MM	17.1%	16.4%	22.9%	32.7%	5.7%	16.4%	40.0%	21.8%	14.3%	12.7%
PH	35.0%	30.6%	10.0%	8.3%	5.0%	5.6%	40.0%	30.6%	10.0%	25.0%
SG	52.5%	46.9%	3.8%	2.7%	1.3%	8.0%	6.3%	13.3%	36.3%	29.2%
TH	40.0%	41.5%	4.0%	3.1%	2.0%	1.5%	34.0%	30.8%	20.0%	23.1%
VN	25.9%	25.0%	7.4%	10.7%	3.7%	10.7%	33.3%	17.9%	29.6%	35.7%

TRUST AND DISTRUST RANKINGS OF MAJOR POWERS IN THE REGION

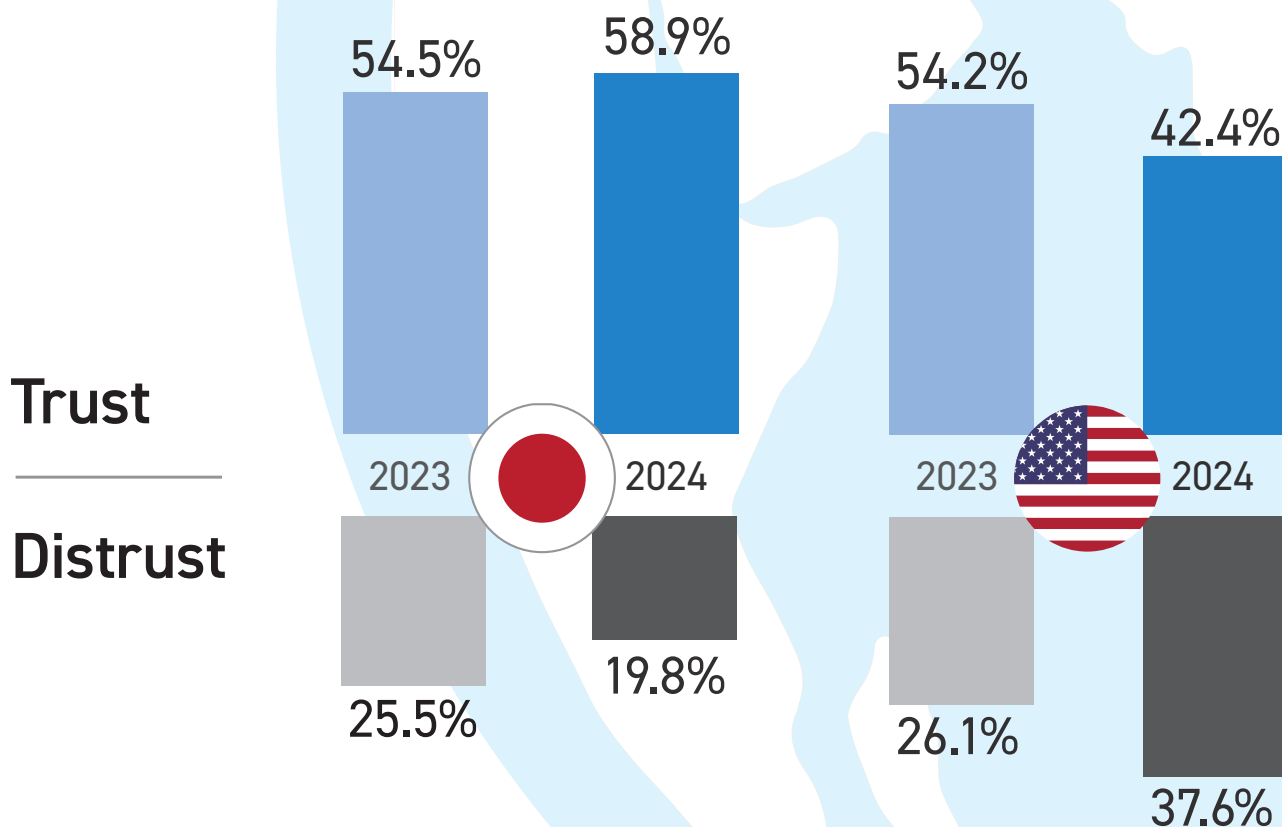
The “trust” and “distrust” rankings of five countries that can exert influence on Southeast Asia are based on a consolidated five-point Likert scale of positive and negative responses (“Very Confident” to “No Confidence”). The “No Comment” responses are removed from this analysis.

Japan maintained its solid lead as the region’s most trusted power (58.9%) with the US coming in second (42.4%), followed by the EU (41.5%), China (24.8%), and India (24.2%). At the country level, the largest drops in trust levels towards Japan are recorded in Brunei (-27.2%) and Laos (-12.0%). The biggest jumps in confidence levels towards Japan can be found in Cambodia (18.7% in 2023 to 61.9% in 2024) and Myanmar (34.8% in 2023 to 49.7% in 2024). The view that Japan is a responsible international law advocate is still strong at 36.5%, albeit a decline from 41.0% in 2023. The assessment that Japan has vast economic resources and the political will to provide global leadership remained steadfast at 27.7%. Japan’s respectful, considerate, low-key style of approach to the region, and its call to regional partners to “co-create” a vision together at the 50th ASEAN-Japan Commemorative Summit in December 2023 was well played.

Trust in the US recorded a significant drop from 54.2% last year to 42.4% this year. Southeast Asia appears cautious of the Biden Administration, with Presidential elections soon to be held in November 2024. The decline in trust is evident in all ASEAN countries except the Philippines, which saw

a slight increase of 4.3%. President Ferdinand Marcos Jr received a warm reception at the White House last year and the signing of the Enhanced Defence Cooperation Agreement was positively welcomed by the Philippines. The largest drops in levels of confidence towards the US can be observed in Laos (-35.0%), Cambodia (-28.5%), and Brunei (-28.1%). While the majority of those who trust the US attribute this to its vast economic resources and political will (45.0%), those who distrust it hold a prevailing view that the US is distracted by its internal affairs, thus unable to focus on global concerns and issues (27.0%).

Trust in the EU has also declined, albeit to a lesser extent compared to the US. From 51.0% in 2023, trust in the EU decreased to 41.5% in 2024, while distrust levels rose from 29.1% to 34.9%. Those who regard the EU positively attribute their trust to the EU’s stance on the environment, human rights, and climate change. Conversely, those who distrust the EU think it is distracted by its internal affairs and thus cannot focus on global concerns and issues. This view is particularly strong in the Philippines, Singapore, and Vietnam.

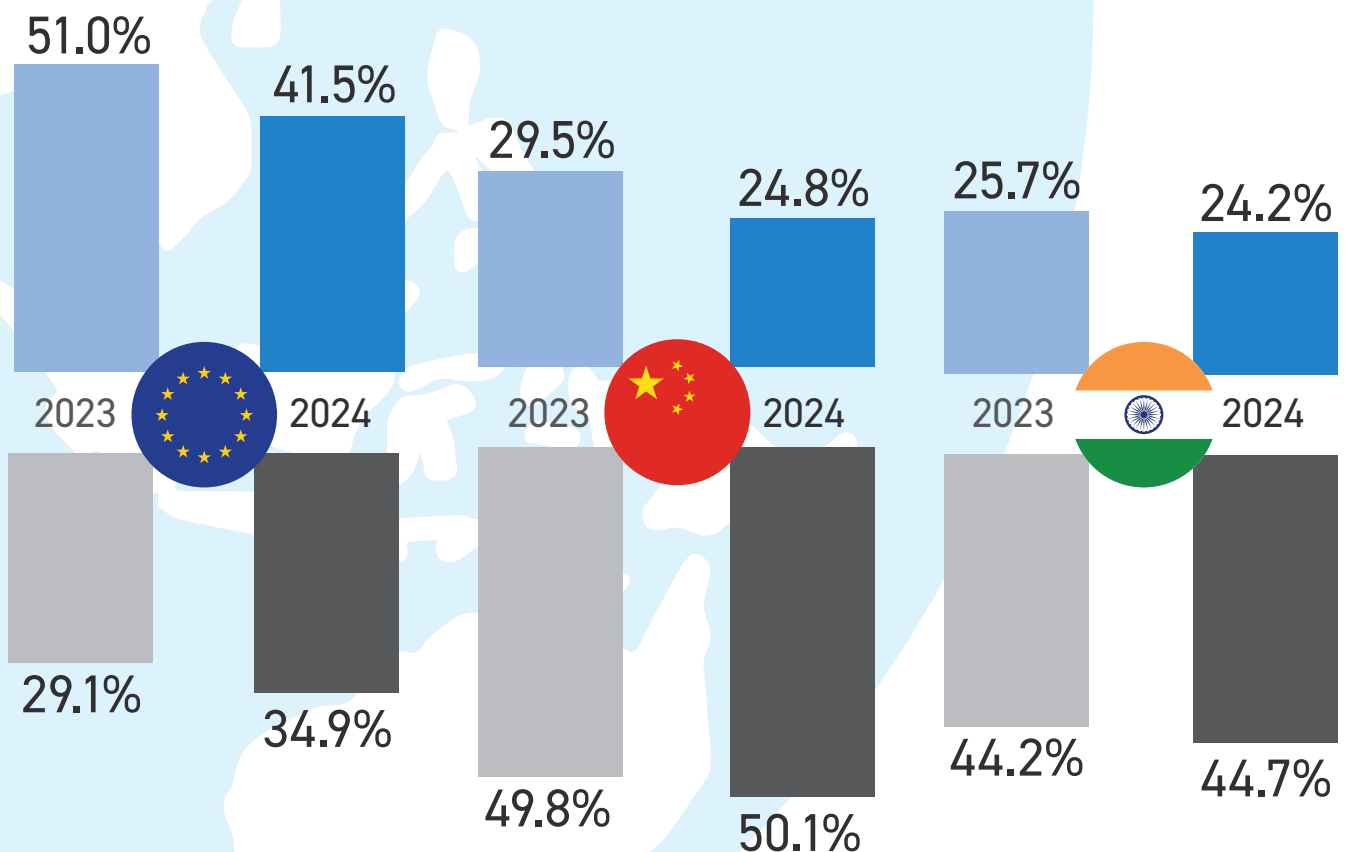


China has experienced a marginal decrease in trust levels from 29.5% in 2023 to 24.8% this year, accompanied by a slight increase in distrust from 49.8% to 50.1%. These changes indicate relatively stable perceptions of China among Southeast Asian countries, with trust levels remaining relatively low compared to other major powers. China is Southeast Asia's largest trading partner but it is also the region's largest source of insecurity. China's increasingly assertive behaviour in the South China Sea is one area of concern. Another is China's slowing economy, forecasted to slow to 4.2% in 2024, which may seriously impact regional economies. At the country level, drastic decreases in trust levels are recorded in Brunei (-45.3%), Cambodia (-21.9%), and Laos (-11.3%). The prevailing reason for distrust levels in China can be attributed to concerns that China's economic and military power could be used to threaten their country's interests and sovereignty. Meanwhile, the reason behind trust in China is the country's vast economic resources and strong political will to provide global leadership. This positive perception is strong in countries such as the Philippines, Malaysia, and Indonesia.

India's trust levels have remained relatively stable, with a slight decrease from 25.7% to 24.2%. Similarly, distrust levels have seen a marginal increase from 44.2% to 44.7%. This unfavourable view of India could be attributed

to its inability to project capacity or political will for global leadership, which saw a notable increase from 33.6% last year to 40.6% this year. This is particularly true among Vietnam, Thailand, Laos, and Cambodia respondents. Southeast Asia sees potential in India providing a better balance of power in the region but India has not been willing to do more and has instead confined itself to its domestic and sub-continental affairs. Last year, India symbolically "arrived" with a landing on the moon and hosted/met the G20, BRICS, and Shanghai Cooperation Organisation but its capacity for leadership on trade, economics, climate, and security remains limited. India's growing ultra-nationalistic tendencies under the Bharatiya Janata Party government has led observers to wonder whether these tendencies may percolate into foreign policy.

The geopolitical environment for Southeast Asia has become harder, and this is not because of the US-China rivalry factor alone. The multilateral global trading system is not as open as it used to be as countries respond to major events such as the Russia-Ukraine war, Israel-Hamas conflict, Red Sea attacks, with tit-for-tat export control restrictions and domestic export bans on items from rice to critical minerals. Without the help of trusted partners to buffer the international rules-based order, Southeast Asia can only look forward to a long, bumpy road ahead.



SECTION VI

Soft Power

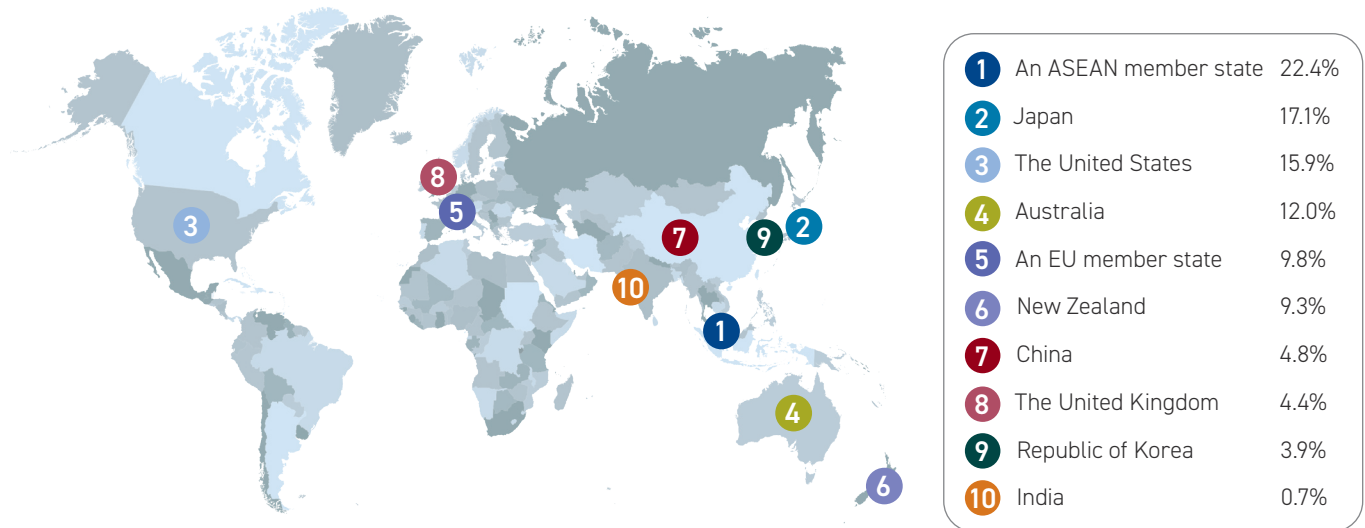
68 - 72

This final section gauges the extent of countries' soft power in the region based on relocation preference and travel choices.

PREFERRED COUNTRY TO LIVE OR WORK IN

More than a fifth of regional respondents stated a preference for living and working in an ASEAN country (22.4%) if given an opportunity to relocate, followed by Japan (17.1%) and the US (15.9%).

Preference for living or working in an ASEAN country is particularly strong among those from Malaysia (36.9%), Brunei (35.1%), Singapore (31.5%), and Indonesia (26.0%). Japan is the preferred country for Philippine respondents (26.0%) while the US is chosen by Myanmar (35.4%) and Cambodia respondents (33.3%). Interestingly, Thailand respondents' preferences are equally split between an ASEAN country and Japan (both at 21.9%).



Q48 If I had a choice, I would like to live or work in this country:

Country	An ASEAN member state	An EU member state	Australia	China	India	Japan	New Zealand	Republic of Korea	The United Kingdom	The United States
ASEAN	22.4%	9.8%	12.0%	4.8%	0.7%	17.1%	9.3%	3.9%	4.4%	15.9%
BN	35.1%	6.5%	11.7%	5.2%	1.3%	14.3%	13.0%	0.0%	7.8%	5.2%
KH	12.7%	6.3%	12.2%	7.9%	0.5%	14.3%	1.1%	6.3%	5.3%	33.3%
ID	26.0%	17.4%	12.8%	2.3%	0.0%	22.6%	7.5%	4.5%	1.9%	4.9%
LA	17.5%	12.5%	11.9%	14.4%	0.6%	11.9%	5.0%	5.6%	2.5%	18.1%
MY	36.9%	7.6%	13.8%	3.6%	1.8%	12.0%	13.3%	2.7%	4.9%	3.6%
MM	7.4%	5.8%	9.0%	1.6%	0.5%	20.6%	7.4%	10.1%	2.1%	35.4%
PH	13.0%	7.4%	8.8%	0.5%	0.0%	26.0%	15.8%	1.9%	6.0%	20.5%
SG	31.5%	8.1%	15.0%	5.5%	0.4%	12.1%	11.0%	1.5%	5.9%	9.2%
TH	21.9%	10.9%	5.5%	4.0%	0.5%	21.9%	14.4%	1.5%	5.0%	14.4%
VN	21.5%	15.0%	19.0%	3.0%	1.0%	15.0%	4.0%	5.0%	2.5%	14.0%

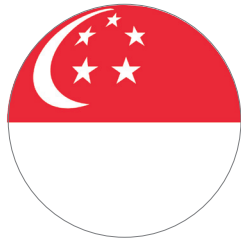
Q49 Please select the ASEAN country you would like to live or work in.

Among the respondents who chose an ASEAN member state as their preferred relocation choice, Singapore emerged as the top choice (28.0%), followed by Thailand (13.0%), Brunei, Indonesia, and Vietnam (all three at 9.7%).

Interestingly, most respondents prefer their own country, except Myanmar respondents who favour Singapore (35.7%). More than a quarter of Lao (28.6%) individuals also desire to relocate to Singapore.

28.0%

Singapore



13.0%

Thailand

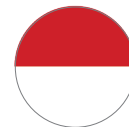


9.7%

Brunei

Indonesia

Vietnam



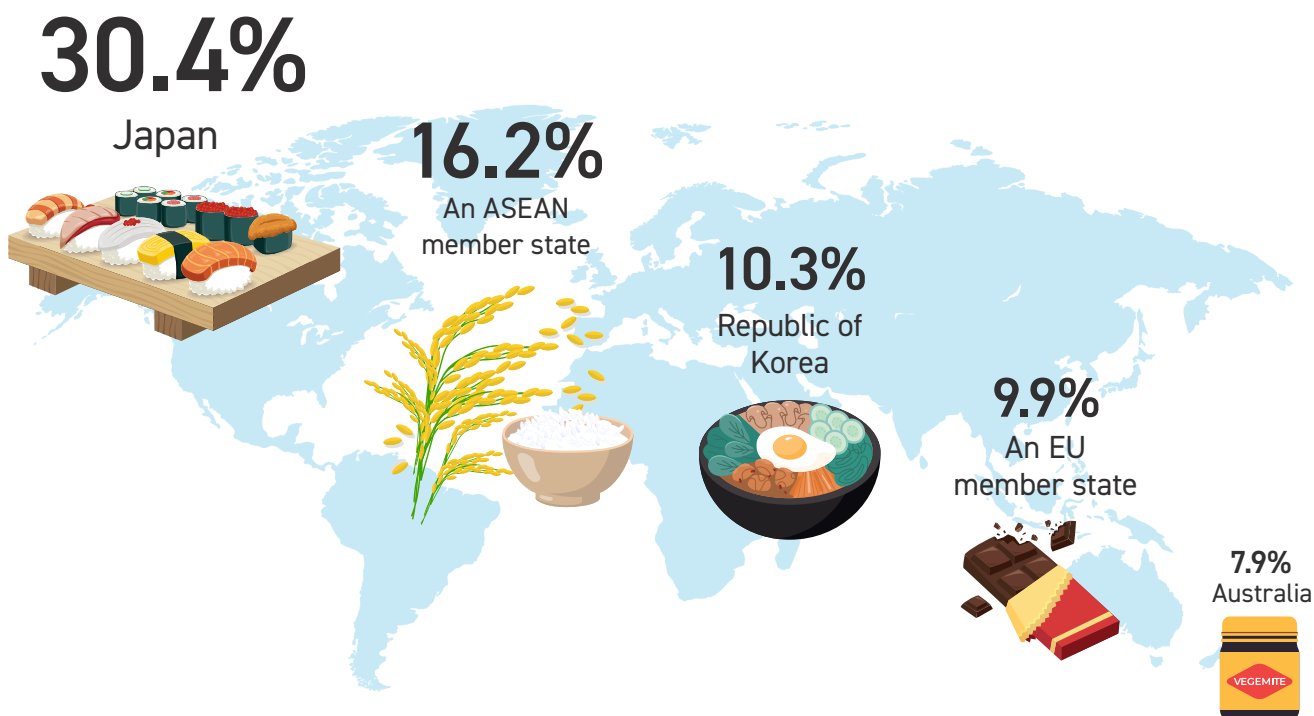
446 respondents who chose the "An ASEAN member state" option in Q48

Country	Brunei	Cambodia	Indonesia	Laos	Malaysia	Myanmar	Philippines	Singapore	Thailand	Vietnam
ASEAN	9.7%	6.4%	9.7%	7.0%	7.0%	2.9%	6.7%	28.0%	13.0%	9.7%
BN	55.6%	0.0%	7.4%	3.7%	7.4%	0.0%	0.0%	22.2%	3.7%	0.0%
KH	8.3%	62.5%	4.2%	0.0%	0.0%	0.0%	0.0%	20.8%	4.2%	0.0%
ID	7.2%	0.0%	68.1%	0.0%	1.4%	0.0%	1.4%	18.8%	2.9%	0.0%
LA	3.6%	0.0%	0.0%	60.7%	0.0%	0.0%	0.0%	28.6%	7.1%	0.0%
MY	8.4%	1.2%	4.8%	0.0%	50.6%	0.0%	0.0%	26.5%	8.4%	0.0%
MM	7.1%	0.0%	7.1%	0.0%	0.0%	28.6%	0.0%	35.7%	14.3%	7.1%
PH	3.6%	0.0%	0.0%	0.0%	0.0%	0.0%	64.3%	25.0%	7.1%	0.0%
SG	3.5%	0.0%	3.5%	1.2%	8.1%	0.0%	1.2%	72.1%	7.0%	3.5%
TH	0.0%	0.0%	2.3%	2.3%	2.3%	0.0%	0.0%	15.9%	72.7%	4.5%
VN	0.0%	0.0%	0.0%	2.3%	0.0%	0.0%	0.0%	14.0%	2.3%	81.4%

PREFERRED COUNTRY TO VISIT

Japan (30.4%) remains the most popular destination to visit among Southeast Asians, followed by an ASEAN member state (16.2%) and the Republic of Korea (10.3%). Japan tops the list of travel destinations among respondents from Thailand (52.7%), the Philippines

(48.8%), Singapore (36.6%), Indonesia (30.6%), Laos (26.4%), and Vietnam (23.5%). An ASEAN member state is preferred in Brunei (28.6%) and Malaysia (24.4%). Meanwhile, the Republic of Korea is preferred among Myanmar respondents (19.0%).



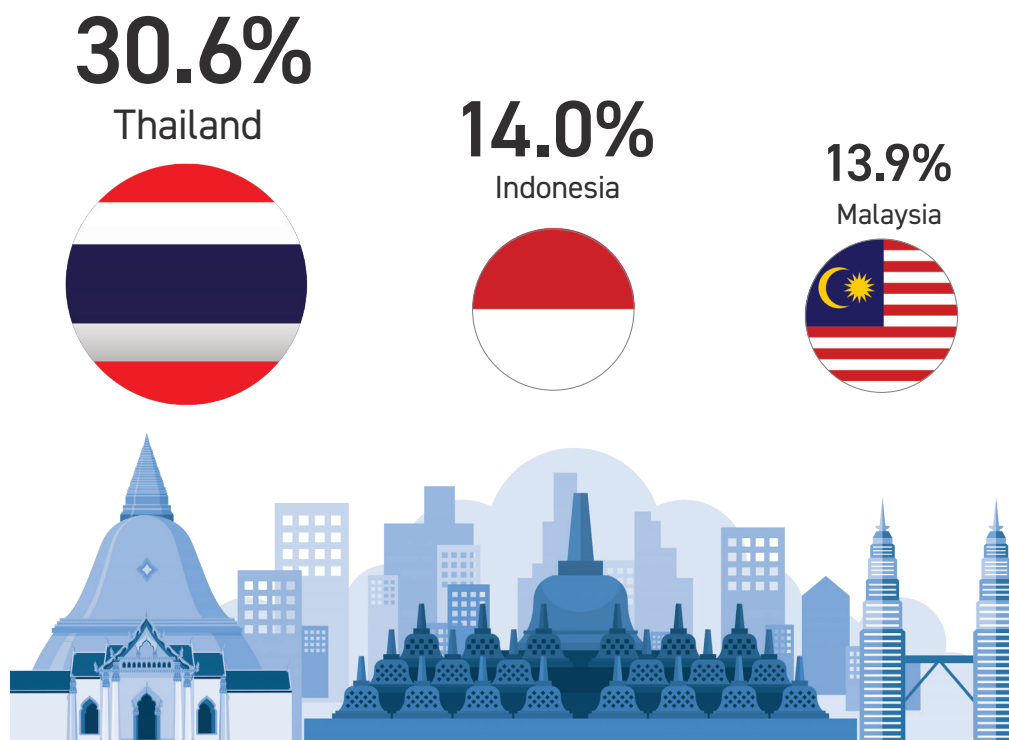
Q50 Which country is your favourite holiday destination?

Country	An ASEAN member state	An EU member state	Australia	China	India	Japan	New Zealand	Republic of Korea	The United Kingdom	The United States
ASEAN	16.2%	9.9%	7.9%	5.9%	1.0%	30.4%	7.8%	10.3%	3.6%	6.9%
BN	28.6%	9.1%	2.6%	3.9%	2.6%	24.7%	3.9%	10.4%	10.4%	3.9%
KH	11.6%	10.6%	9.5%	6.9%	0.0%	22.8%	0.5%	9.5%	4.8%	23.8%
ID	18.5%	17.7%	5.7%	2.3%	0.8%	30.6%	7.9%	12.1%	3.0%	1.5%
LA	15.0%	8.1%	9.4%	16.3%	1.3%	26.3%	11.9%	4.4%	0.0%	7.5%
MY	24.4%	7.1%	10.2%	6.7%	1.3%	21.8%	13.8%	8.9%	3.1%	2.7%
MM	14.3%	10.6%	7.9%	3.2%	1.1%	15.9%	11.1%	19.0%	5.3%	11.6%
PH	9.3%	7.0%	2.3%	0.0%	0.5%	48.8%	10.7%	10.2%	3.3%	7.9%
SG	17.6%	8.4%	13.6%	7.7%	1.1%	36.6%	6.6%	3.7%	2.6%	2.2%
TH	10.0%	6.0%	5.0%	3.0%	1.0%	52.7%	10.0%	7.0%	2.5%	3.0%
VN	13.0%	14.0%	13.0%	9.5%	0.5%	23.5%	2.0%	18.0%	1.5%	5.0%

Q51 Please select your favourite ASEAN country for a holiday destination.

Among the respondents who chose an ASEAN member state as their favourite destination, Thailand is the top choice with a share of 30.6%, followed by Indonesia (14.0%) and Malaysia (13.9%).

Interestingly, respondents from Cambodia (31.8%), Indonesia (46.9%), Laos and Thailand (both at 50.0%), Vietnam (46.2%) and the Philippines (40.0%) prefer to spend their holidays in their own country.



313 respondents who chose the "An ASEAN member state" option in Q50

Country	BN	KH	ID	LA	MY	MM	PH	SG	TH	TL	VN
ASEAN	2.8%	3.9%	14.0%	7.7%	13.9%	0.4%	5.5%	12.1%	30.6%	0.9%	8.3%
BN	4.5%	0.0%	9.1%	0.0%	50.0%	0.0%	0.0%	13.6%	22.7%	0.0%	0.0%
KH	4.5%	31.8%	18.2%	0.0%	4.5%	0.0%	0.0%	13.6%	22.7%	0.0%	4.5%
ID	4.1%	0.0%	46.9%	0.0%	8.2%	0.0%	4.1%	18.4%	16.3%	0.0%	2.0%
LA	4.2%	0.0%	4.2%	50.0%	4.2%	0.0%	0.0%	8.3%	20.8%	0.0%	8.3%
MY	1.8%	1.8%	27.3%	0.0%	21.8%	0.0%	1.8%	5.5%	38.2%	0.0%	1.8%
MM	3.7%	0.0%	11.1%	0.0%	7.4%	3.7%	0.0%	22.2%	44.4%	3.7%	3.7%
PH	0.0%	5.0%	0.0%	0.0%	5.0%	0.0%	40.0%	20.0%	25.0%	0.0%	5.0%
SG	0.0%	0.0%	22.9%	4.2%	33.3%	0.0%	0.0%	2.1%	31.3%	0.0%	6.3%
TH	5.0%	0.0%	0.0%	15.0%	5.0%	0.0%	5.0%	10.0%	50.0%	5.0%	5.0%
VN	0.0%	0.0%	0.0%	7.7%	0.0%	0.0%	3.8%	7.7%	34.6%	0.0%	46.2%

APPRECIATION

We would like to extend our deepest appreciation to Dr Asyurah Salleh and Ms Eliza Cheah of Global Awareness & Impact Alliance (GAIA) of Brunei for helping us to promote this survey in their foreign policy circles.

We would like to extend our thanks to our ISEAS fellows who helped craft, curate, and refine earlier drafts of the survey. In addition, we would like to express our sincere appreciation to Dr Samuel Chng, Senior Research Fellow, LKY Centre for Innovative Cities and Ms Sarah Chan, Chan Heng Chee Research Fellow at the Singapore University of Technology and Design for their invaluable advice on statistical methods.

We wish to extend our sincere appreciation to the 1,994 respondents for taking their time to complete this survey. By expressing your collective views, ASEAN stakeholders are held to high standards to create an ASEAN Community that is inclusive and embracing.

Last but not least, we are also grateful to all our readers for their support and feedback as we continuously work to improve the survey. If you wish to stay updated on the Centre's activities, do sign up for our newsletter at <https://bit.ly/ASC-Updates> or by scanning the QR code below. You may email any comments and questions about the survey to asc@iseas.edu.sg

