

The State of
Southeast Asia
2025 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) 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.

CONTENTS

ABOUT THE SURVEY	2
METHODOLOGY	3
SURVEY HIGHLIGHTS	4
SECTION I	
Respondents' Profile	6
SECTION II	
Regional Outlook and Views of International Developments	13
SECTION III	
Major Powers' Regional Influence and Leadership	31
SECTION IV	
US-China Rivalry and its Impact on Southeast Asia	44
SECTION V	
Perceptions of Trust	57
SECTION VI	
Soft Power	70

ABOUT THE SURVEY

The State of Southeast Asia survey, now in its seventh year, continues to gauge the views and perceptions of Southeast Asian opinion-makers and thought leaders on geopolitical developments, issues affecting ASEAN and its Member States, 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 six weeks from 3 January 2025 to 15 February 2025. This period straddles the inauguration of Donald Trump's second term as US President on 20 January 2025. 48.5% of respondents took the survey before and 51.5% after the inauguration. There were no discernible differences in the results recorded from the two groups.

The survey was offered in six language options – English, Bahasa Indonesia, Burmese, Khmer, Thai, and Vietnamese.

A total of 2,023 respondents from ten ASEAN member states and Timor-Leste took part in the survey. For the first time, this year's survey includes perspectives from Timor-Leste, which is pending formal admission to ASEAN.

There are six sections in the survey. **Section I** covers the profile of the respondents by nationality, education, affiliation, age, top news source, gender and political leanings. **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 Southeast Asians' trust perceptions towards five countries – China, the European Union, India, Japan, and the US. **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 the survey's methodology. Eligibility criteria were tightened this year based on nationality, education, affiliation, and age. Respondents were further screened on their knowledge of ASEAN and level of interest in current affairs. Putting aside branching questions, the survey comprised **44** questions in total which took approximately 20 to 35 minutes to complete. It was conducted completely online using a mixed purposive sampling method.

A total of **2,023** Southeast Asians completed the survey from both non-panel and panel providers. Respondents came from **five affiliation categories**: (a) academia, think-tankers, or researchers; (b) private sector representatives; (c) civil society, non-government organisations (NGOs) or media representatives; (d) government officials; and (e) regional or international organisations personnel.

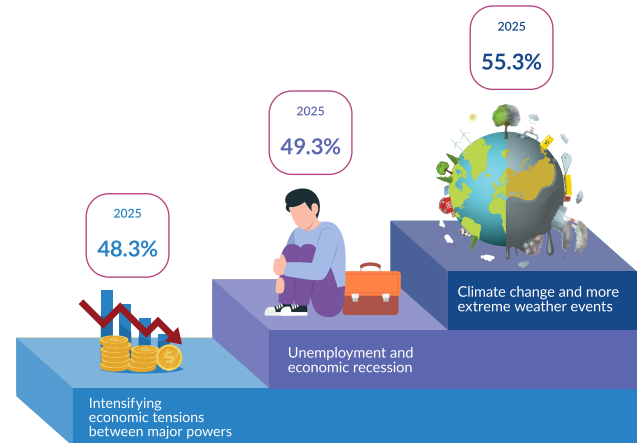
An equal 10% weightage was applied to the ten ASEAN member states' responses to calculate the average figures for ASEAN as a whole. This is to ensure that the responses of each country are represented by equal proportion, given that ASEAN's decision-making processes are based on each country having equal say, regardless of geographical or population size. Final analysis of regional sentiment was conducted on the weighted data set. A strict set of criteria was applied to remove duplicates, speeders, and straightliners in order to maintain data quality and integrity.

For the first time this year, the survey includes perspectives from Timor-Leste, which is pending formal admission into ASEAN. As Timor-Leste is not formally a member of ASEAN yet, its country responses are presented in a separate row in each data table. Regional aggregated averages do not include Timor-Leste results.

Note: No weighting was applied to respondent profile questions (Questions 1 to 7). A different statistical method was applied to Question 26. It was analysed using a rank-sum method. Equal 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 ASEAN Dialogue Partners.

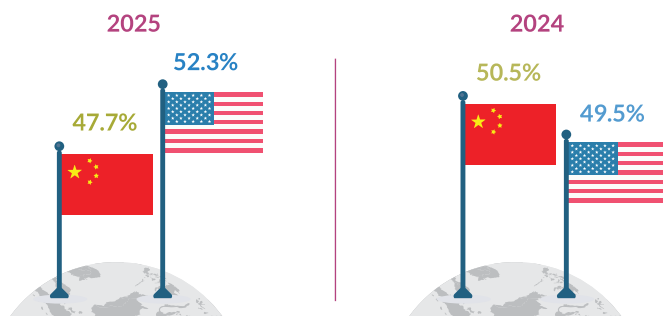
SURVEY HIGHLIGHTS

1 For the first time, climate change and more extreme weather events (55.3%) is billed as the region's top challenge. As Southeast Asia continues to face unprecedented challenges in the global geopolitical and economic environment, unemployment and economic prospects (49.3%), followed by fears of intensifying economic tensions between the major powers (48.3%), remain among the region's pressing concerns. Deteriorating human rights conditions ranks last (12.0%).



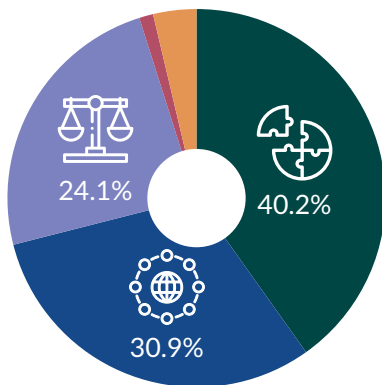
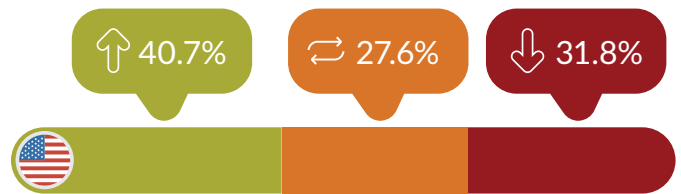
2 More than half of the respondents (51.6%) rank aggressive behaviour in the South China Sea as their top geopolitical concern, followed by global scam operations (48.1%) and the new US leadership (46.9%). Concerns over China's encroachments in the Exclusive Economic Zones (EEZs) and continental shelves of Southeast Asia's littoral states (48.2%) and an accidental conflict between an ASEAN member state and China (44.3%) are high. This could be attributed partly to the recent altercations in the South China Sea that have heightened the region's anxieties.

3 China remains the most influential economic (56.4%) and political-strategic (37.9%) power in the region, outpacing the US by significant margins, albeit with some decline in its overall economic and political-strategic influence. Among ASEAN Dialogue Partners, China (mean score of 8.80 out of 11.0) tops the charts in terms of strategic relevance to ASEAN, followed by the US (8.76) and Japan (7.53). Despite China's positive standing, the region's concern about its growing economic and political-strategic influence outweighs its acceptance.



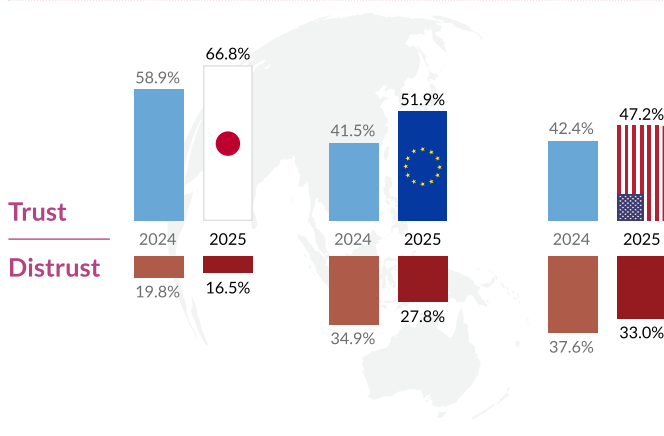
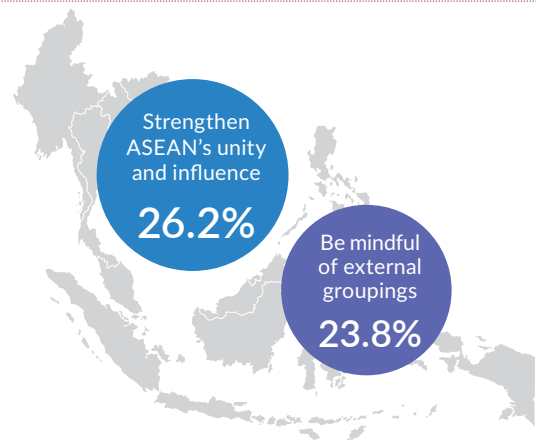
4 The US has overtaken China to become the prevailing choice (52.3%) if the region were forced to align itself with one of the two strategic rivals. China as a choice dropped from 50.5% in the previous year to 47.7%. More than half of the respondents (53.2%) believe that ASEAN should enhance its resilience and unity to fend off pressures from the two global powers.

5 40.7% of the respondents feel that the US' engagement with Southeast Asia under President Trump will either increase or increase significantly. Among these, more than a third (38.7%) attribute it to President Trump's tough stance on China to maintain a balance of power. On the other hand, more than half of respondents (51.2%) who anticipate a decrease in engagement attribute it to President Trump's unpredictable character, which adds uncertainty to US engagement with the region.



6 40.2% of the respondents prefer to accelerate ASEAN regional integration among member states in response to rising protectionism and nationalism. Only 30.9% of the respondents view deepening cooperation with like-minded partners beyond ASEAN as a suitable strategy and 24.1% believe in strengthening institutions that support the rule of law.

7 When it comes to managing ASEAN member states' participation in new informal groupings, two responses that prioritise ASEAN and are wary of these other groupings are favoured by half of the respondents. The first group (26.2%) supports ASEAN in strengthening its convening power to ensure its members remain committed and discourage them from joining other groupings. The second group (23.8%) believes that member states should be mindful of joining groupings that risk undermining ASEAN centrality.



8 Japan remains the most trusted major power in Southeast Asia (66.8%) with significant gains from 58.9% last year. The EU (51.9%) surpassed the US (47.2%) this year as the second most trusted power. 41.2% of respondents express distrust towards China with close to half of these (47.6%) fearing that China could use its economic and military power to threaten their country's interest and sovereignty. In the soft power contest, Japan also shines as the top choice for tourism (33.0%).

SECTION I

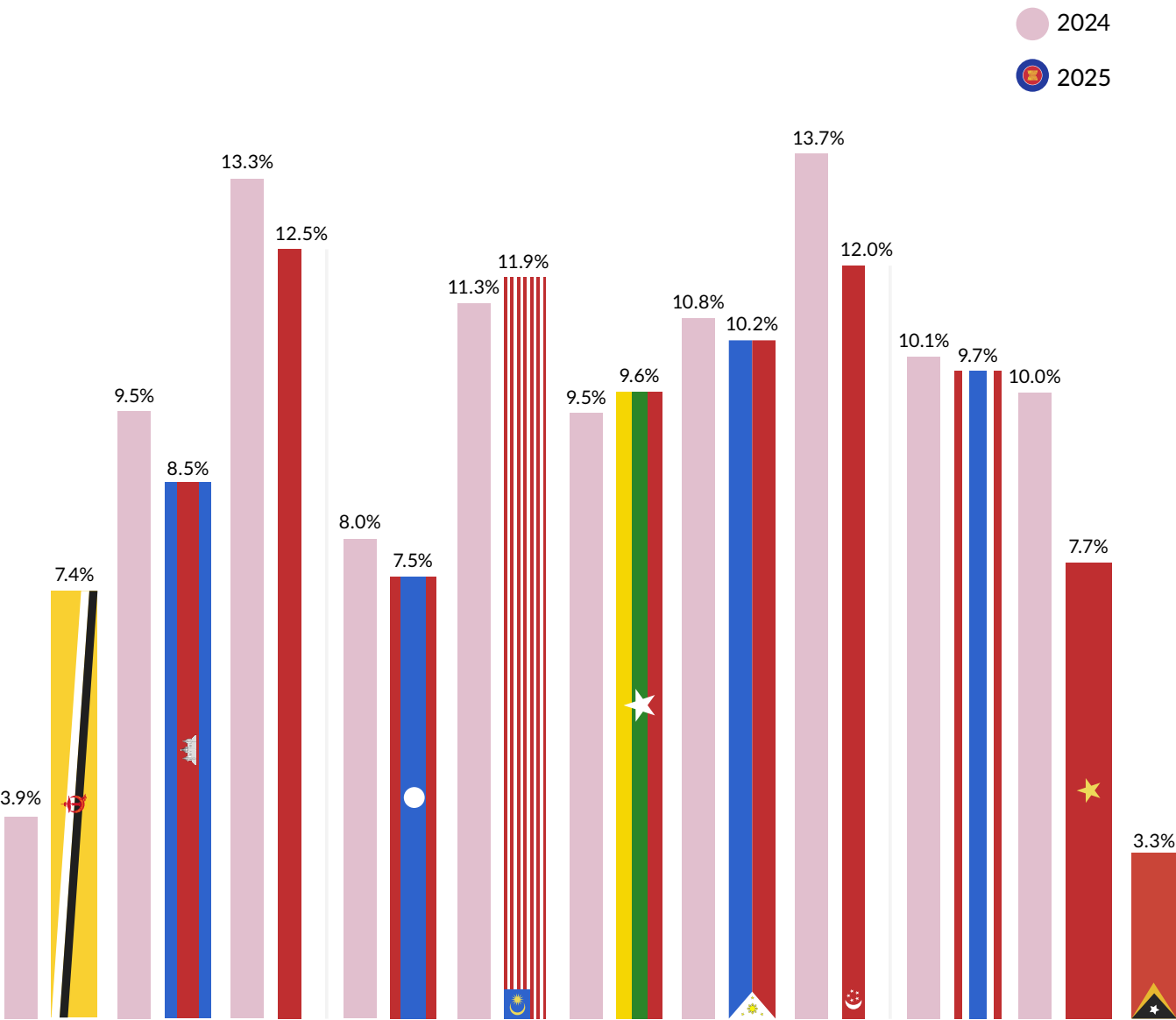
Respondents' Profile 06 - 12

This section features the background of the survey respondents, including their nationality, education, affiliation, age distribution, news consumption patterns, gender and political leanings. *No weighting is applied in this section.*

NATIONALITY

A total of 2,023 respondents from ten ASEAN member states participated in this survey. Notably, for the first time this year, the survey includes respondents from Timor-Leste, which is pending formal admission to ASEAN. Indonesia led with the highest number of respondents at 252 (12.5%), closely followed by Singapore at 242 (12.0%) and Malaysia at 240 (11.9%). The breakdown for the rest of the countries is as follows: The Philippines (10.2%), Thailand (9.7%), Myanmar (9.6%), Cambodia (8.5%), Vietnam (7.7%), Laos (7.5%), Brunei (7.4%) and Timor-Leste (3.3%).

Q1 What is your nationality?



EDUCATION

A majority of respondents (53.0%) hold a Bachelor's degree. Compared to last year, there is an increase of respondents with Master's (27.3%) and Doctoral (9.9%) degrees. The smallest group are those with post-secondary/non-tertiary qualification at 9.7%.

The country with the highest numbers of Bachelor's degree qualifications is Vietnam (74.2%), whereas the country with the greatest number of respondents with Master's qualification is Myanmar (45.4%).

Malaysia respondents have the highest number of Doctoral degree holders (17.1%), whereas the highest number of post-secondary/non-tertiary education respondents comes from Singapore (16.9%).

A large proportion of Timor-Leste respondents have Bachelor's (48.5%) and Master's (42.4%) degrees, followed by 6.1% with post-secondary/non-tertiary qualification and 3.0% with a Doctoral degree.



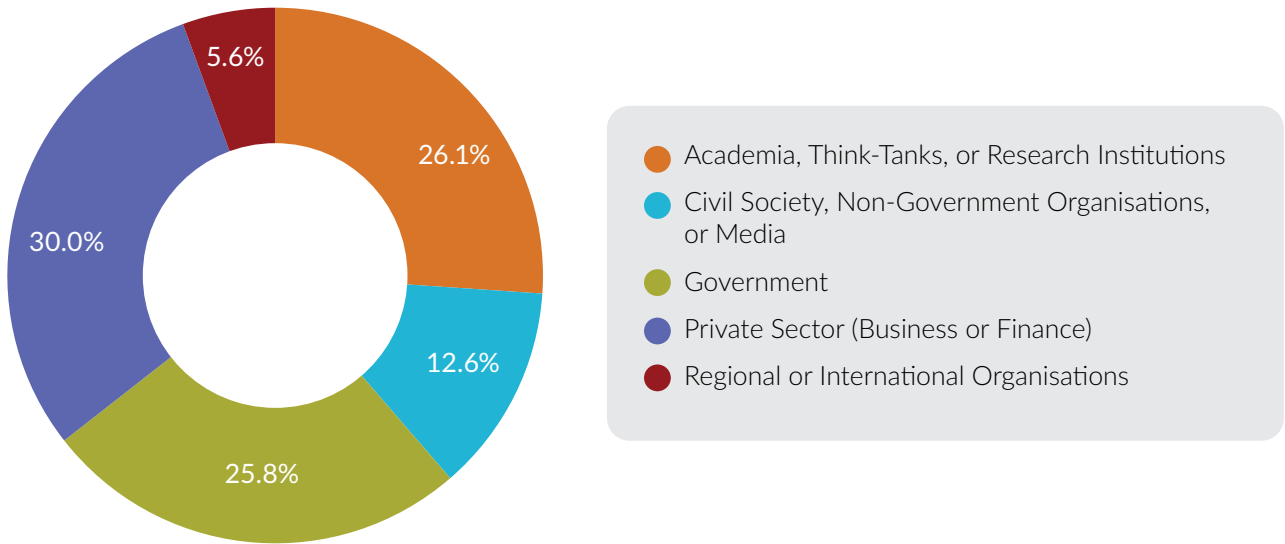
Q2 What is the highest education level that you have attained?

Country	Post-Secondary/ Non-Tertiary	Bachelor's Degree	Master's Degree	Doctoral Degree
ASEAN	9.7%	53.0%	27.3%	9.9%
BN	4.7%	43.6%	39.6%	12.1%
KH	10.5%	51.7%	34.3%	3.5%
ID	4.4%	67.9%	18.7%	9.1%
LA	6.0%	48.3%	39.1%	6.6%
MY	12.5%	50.8%	19.6%	17.1%
MM	6.7%	34.5%	45.4%	13.4%
PH	13.1%	64.6%	14.6%	7.8%
SG	16.9%	37.2%	33.1%	12.8%
TH	14.3%	59.2%	18.4%	8.2%
VN	5.8%	74.2%	12.9%	7.1%
TL	6.1%	48.5%	42.4%	3.0%

AFFILIATION

The largest affiliation group is from the private sector (30.0%). The second largest group is academia, think-tanks or research institutions (26.1%), closely followed by government representatives (25.8%).

Civil society, non-government organisations, or media is represented by 12.6% of respondents. As was the case last year, the smallest representation comes from respondents affiliated with regional or international organisations (5.6%).



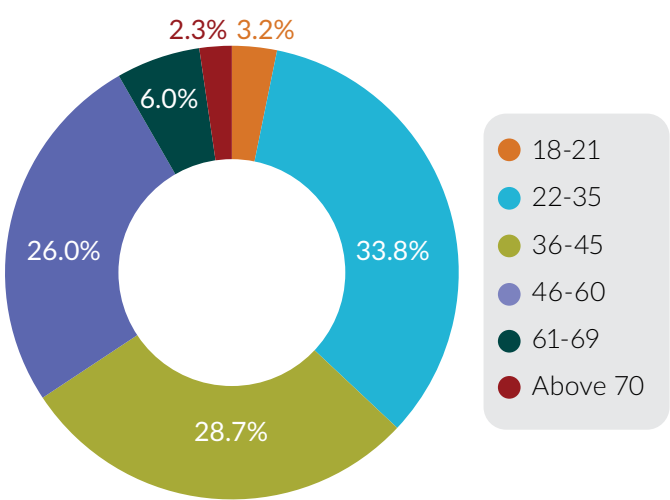
Q3 What is your affiliation?

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	26.1%	12.6%	25.8%	30.0%	5.6%
BN	18.8%	10.7%	21.5%	40.3%	8.7%
KH	35.5%	11.6%	12.2%	34.9%	5.8%
ID	30.6%	18.3%	24.2%	23.8%	3.2%
LA	16.6%	13.2%	25.8%	39.7%	4.6%
MY	29.2%	7.1%	33.8%	25.0%	5.0%
MM	24.7%	22.7%	15.5%	30.9%	6.2%
PH	20.4%	18.0%	32.5%	26.2%	2.9%
SG	28.9%	12.4%	26.4%	24.8%	7.4%
TH	25.5%	4.1%	37.2%	30.6%	2.6%
VN	29.7%	5.8%	21.9%	38.7%	3.9%
TL	15.2%	10.6%	30.3%	18.2%	25.8%

AGE GROUP

Similar to 2024, the largest group of respondents is those aged 22-35 years old (33.8%). This is followed by those aged 36-45 years old (28.7%) and the 46-60 years old group (26.0%).

The older age groups, comprising respondents between 61-69 years old (6.0%) and those aged above 70 years old (2.3%), account for a combined total of 8.3%, while the smallest age group are respondents between 18-21 years old (3.2%).



Q4 Which age group do you belong to?

Country	18-21	22-35	36-45	46-60	61-69	Above 70
ASEAN	3.2%	33.8%	28.7%	26.0%	6.0%	2.3%
BN	2.0%	30.9%	32.2%	33.6%	1.3%	0.0%
KH	12.2%	40.1%	29.1%	17.4%	1.2%	0.0%
ID	1.2%	39.7%	27.8%	27.8%	3.6%	0.0%
LA	2.6%	36.4%	41.7%	17.2%	2.0%	0.0%
MY	2.5%	35.8%	22.9%	25.8%	8.8%	4.2%
MM	1.5%	23.7%	31.4%	35.6%	5.7%	2.1%
PH	3.4%	40.8%	21.8%	18.9%	12.6%	2.4%
SG	2.5%	17.8%	25.2%	34.3%	12.0%	8.3%
TH	2.6%	34.2%	27.6%	27.6%	5.1%	3.1%
VN	4.5%	39.4%	30.3%	20.0%	4.5%	1.3%
TL	0.0%	39.4%	39.4%	18.2%	3.0%	0.0%

CONSUMPTION OF NEWS

In a new question this year, respondents are asked to share their top news sources for geopolitical affairs. The most cited sources are Newspapers, Print Media, and Television, with mention of popular outlets including *Al-Jazeera*, *BBC*, *Bloomberg*, *CNA*, *CNN*, *Reuters*, *The New York Times*, *The Straits Times*, and *Wall Street Journal*. Less cited news sources include *Bangkok Post*, *Business Times*, *The Diplomat*, *The Guardian* and *Foreign Policy*, among others. Respondents also highlight various local news outlets, including those in local languages as a source of information such as *ABS-CBN*, *Berita Harian*, *Borneo Bulletin*, *Free Malaysia Today*, *The Irrawaddy*, *Khmer Times*, *MetroTV* and *Tempo Digital*.

Social media is another common source of information, with Facebook, Instagram, X (Twitter), and YouTube being the most frequently mentioned platforms, while TikTok is less popular. Social messaging applications such as Line, Telegram, Viber, and WhatsApp are also noted as sources of information, but much less relied on than social media.

Official government websites and the ASEAN Secretariat website are also mentioned, though to a lesser extent.

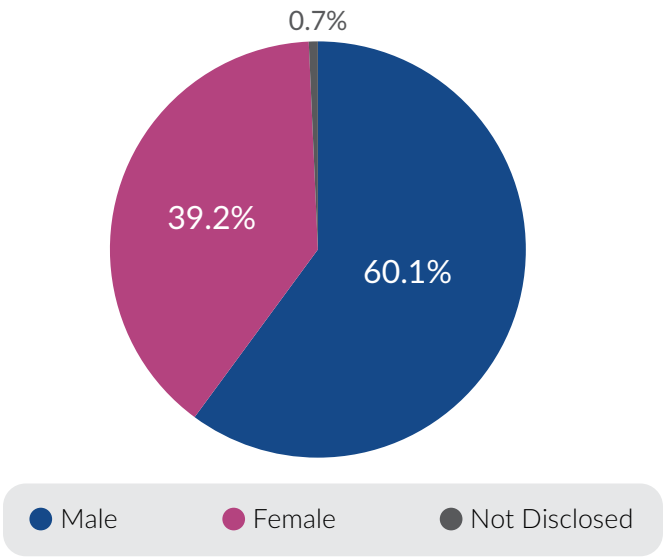
Q5 Please list your top news source.



GENDER AND POLITICAL LEANINGS

In terms of gender breakdown, 60.1% of the survey's respondents identified as male while 39.2% identified as female. 0.7% preferred not to disclose their gender.

Q6 What is your gender?



90.8% of ASEAN-10 respondents believe that a democratic political system, characterised by free, fair, and frequent elections, independent media, and freedom of association and opinion, to be the best form of governance for their country and the region. 9.2% do not believe this form of governance to be beneficial.

Timor-Leste shares the same view with their ASEAN-10 brethren at 90.9%.

Q7 Do you believe a democratic political system (characterised by free, fair, and frequent elections, an independent and pluralistic media, and freedom of association and opinion, among others) to be the best form of governance for your country and the region?

Country	Yes	No
ASEAN	90.8%	9.2%
BN	76.5%	23.5%
KH	93.6%	6.4%
ID	96.0%	4.0%
LA	89.4%	10.6%
MY	88.8%	11.3%
MM	94.8%	5.2%
PH	95.6%	4.4%
SG	92.6%	7.4%
TH	90.3%	9.7%
VN	83.2%	16.8%
TL	90.9%	9.1%

Regional Outlook and Views on International Developments 13-30

This section examines the region's key challenges and main preoccupations. *Weighting of ten ASEAN member states is applied from this section onwards. Timor-Leste responses are not weighted.*

TOP THREE CHALLENGES FACING SOUTHEAST ASIA

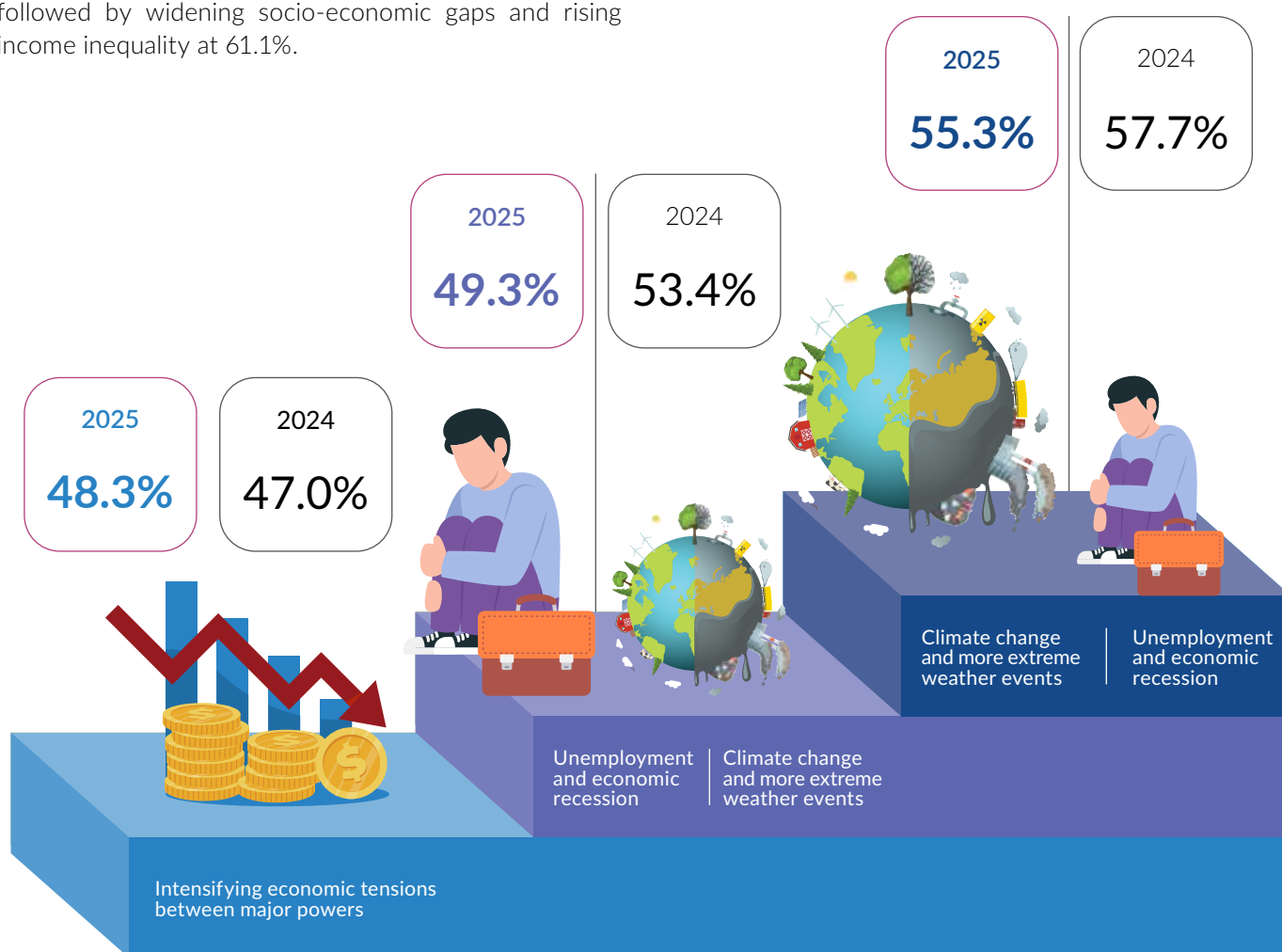
For the first time since the survey was conducted in 2019, at an ASEAN-10 aggregated level, a majority of Southeast Asians (55.3%) say that climate change and extreme weather events are now the region's biggest challenge. Climate change has overtaken unemployment and economic recession worries, which topped the list of challenges for the past two years. This is the top challenge for four countries. The Philippines and Vietnam, the two front-line countries in the way of strong typhoons, rate climate change at 70.9% and 70.3% respectively. This is followed by Malaysia (55.0%) and Thailand (54.6%) respondents who also say that climate change has impacted them.

Sluggish economic prospects are still ranked second (49.3%), followed closely by fears of intensifying economic tensions between the major powers (48.3%). With a marginal 1.0% difference between the two choices, economic recessionary fears and intensifying economic tensions appear to be two sides of the same coin for Southeast Asia. For Indonesia, unemployment and economic recession are its top challenges at 66.3%, followed by widening socio-economic gaps and rising income inequality at 61.1%.

Unlike the rest of the region, Indonesia's preoccupation appears to be domestically-driven and not externally focused on intensifying economic rivalry, which is ranked in fourth place (31.7%). The economic rivalry between the US and China is most keenly felt by Singapore's open economy at 62.4%, followed by Laos at 58.3% and Cambodia at 56.4%.

For Myanmar, it is no surprise that domestic political instability continues to dominate the country's challenges at 58.8%, down from 70.9% last year. Due to its geographical proximity to the South China Sea, Brunei sees increased military tensions arising from potential flashpoints as their biggest challenge at 52.3%.

Climate change (77.3%), widening socio-economic gaps and rising income inequality (60.6%), and unemployment and economic recession (57.6%) are the biggest challenges of Timor-Leste, the youngest nation in Southeast Asia.



Q8 What are the top three challenges facing Southeast Asia? *(Check 3 responses)*

2025								
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-10	48.3%	49.3%	35.3%	15.2%	41.2%	55.3%	43.4%	12.0%
BN	51.0%	50.3%	40.3%	25.5%	52.3%	37.6%	36.9%	6.0%
KH	56.4%	48.3%	36.0%	15.7%	37.2%	48.3%	40.1%	18.0%
ID	31.7%	66.3%	28.2%	9.5%	28.2%	59.9%	61.1%	15.1%
LA	58.3%	50.3%	38.4%	18.5%	39.7%	47.7%	34.4%	12.6%
MY	53.3%	45.4%	43.8%	8.3%	30.4%	55.0%	54.6%	9.2%
MM	39.2%	39.7%	58.8%	23.7%	36.6%	46.9%	32.5%	22.7%
PH	40.8%	53.9%	16.5%	20.4%	55.8%	70.9%	30.1%	11.7%
SG	62.4%	32.6%	24.4%	12.8%	55.4%	62.0%	47.9%	2.5%
TH	51.0%	54.1%	34.2%	12.2%	25.5%	54.6%	54.1%	14.3%
VN	39.4%	51.6%	32.3%	5.2%	51.0%	70.3%	42.6%	7.7%
TL	25.8%	57.6%	28.8%	6.1%	24.2%	77.3%	60.6%	19.7%

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-10	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%

TOP THREE GEOPOLITICAL CONCERNS

Out of eight top geopolitical developments in 2024, aggressive behaviour in the South China Sea has overtaken the Israel-Hamas conflict to become the top concern for ASEAN-10 governments at 51.6% this year. Last year's series of altercations at sea between China and the Philippines have elevated the risks of an accidental conflict considerably, with the Second Thomas Shoal stand-off being the most serious incident to date. The concerns over aggressive behaviour in the South China Sea are shared by three ASEAN claimant states – the Philippines (90.3%), Vietnam (74.8%), and Brunei (57.7%). Cambodia (47.1%), a non-claimant state to the dispute, also chose this as a top geopolitical concern. Interestingly, aggression in the South China Sea is not a top-ranked concern for Malaysia, a claimant state to the disputed area.

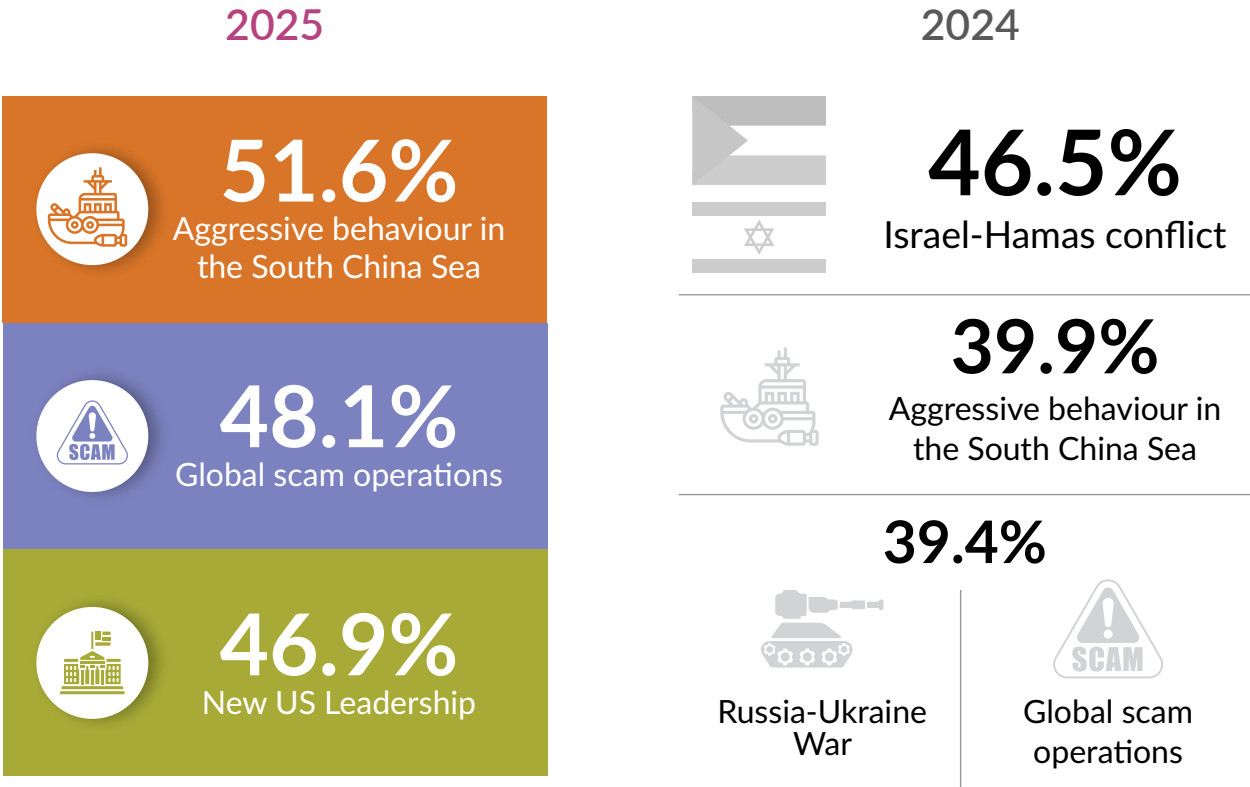
Global scam operations is ranked second at 48.1%. It ranks highest for Thailand (71.4%) and Laos (44.4%), which is not surprising as these two countries have been spotlighted as host countries for scam operations. Thailand has reportedly cooperated with China to stamp out these illegal operations by cutting off electricity and internet to the border town areas of Myanmar, resulting in the arrests and deportations of Chinese and other foreign nationals involved in these operations. The issue came to light late in 2024 when a famous Chinese actor was abducted in Chiang Mai, Thailand and forced to work in one of the scam centres.

The new US leadership is the third concern at 46.9%. Worry about the second Trump Administration is the top preoccupation for Singapore at 70.2%. Any changes in US political, economic, and defence policies would impact Singapore, one of the US' closest partners in the region. One of the biggest issues to have grabbed attention since the advent of Trump 2.0 are the allegations of export control violations of Nvidia chips in Singapore that enabled the development of China's AI model DeepSeek.

The Israel-Hamas conflict, which preoccupied many governments last year and continues to provoke concern, has dropped to fourth place at 36.7%. Israel's war against Hamas and Hezbollah continues to be Malaysia's and Indonesia's top geopolitical concerns at 75.8% and 64.7%, as the region's two biggest Muslim-majority countries. The conflict is not nearer to any resolution following the US' hardening of its position with Israel, including a proposal by Trump to resettle all Palestinians from Gaza and to turn Gaza into a tourist destination.

The effects of international drug smuggling are ranked 5th, followed by the Russia-Ukraine war (6th place), the ongoing Myanmar crisis (7th place) and finally, North Korea's ballistic missile tests in last place.

For Timor-Leste, its top geopolitical concern is the Myanmar crisis (59.1%), followed by the new US leadership and global scam operations, both tied at second place (47.0%).



Q9 Which of the following current geopolitical events are the top concerns for the government in your country? (Check 3 responses)

2025								
Country	Russia-Ukraine War	Israel's war against Hamas and Hezbollah	New US leadership	Aggressive behaviour in the South China Sea	Myanmar crisis	North Korea's continued ballistic missile testing	Global scam operations	International drug smuggling
ASEAN-10	32.4%	36.7%	46.9%	51.6%	31.9%	17.3%	48.1%	35.0%
BN	22.1%	56.4%	45.6%	57.7%	36.9%	23.5%	36.9%	20.8%
KH	39.5%	25.0%	44.2%	47.1%	37.2%	20.9%	46.5%	39.5%
ID	27.0%	64.7%	41.7%	50.0%	16.3%	10.7%	43.7%	46.0%
LA	41.1%	27.8%	42.4%	42.4%	38.4%	29.8%	44.4%	33.8%
MY	25.0%	75.8%	43.3%	55.0%	24.2%	7.9%	47.1%	21.7%
MM	24.7%	16.0%	50.0%	31.4%	75.8%	18.0%	48.5%	35.6%
PH	21.4%	16.0%	35.0%	90.3%	2.9%	17.0%	56.8%	60.7%
SG	30.2%	49.2%	70.2%	51.7%	16.9%	13.6%	51.2%	16.9%
TH	30.1%	19.9%	48.0%	15.8%	50.5%	14.3%	71.4%	50.0%
VN	62.6%	16.1%	49.0%	74.8%	20.0%	17.4%	34.8%	25.2%
TL	39.4%	18.2%	47.0%	42.4%	59.1%	13.6%	47.0%	33.3%

2024										
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	North Korea's continued ballistic missile testing	Global scam operations	International drug smuggling	Change of political leadership in the region
ASEAN-10	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%

TOP CONCERN ABOUT ASEAN

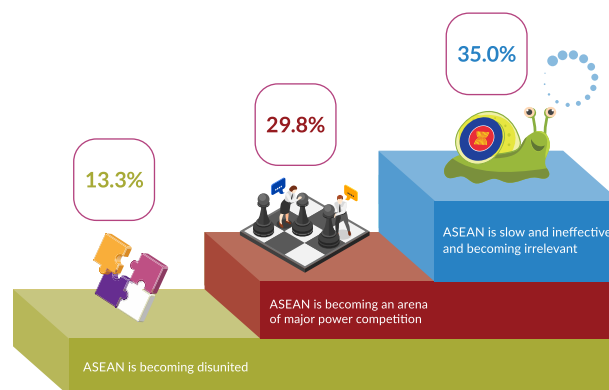
In order to pinpoint the region's top concern about ASEAN, respondents can choose only 1 response this year. This question no longer allows for 3 choices as in previous years. Hence there will be no comparison with past years' choices.

35.0% of the region at the aggregated ASEAN-10 level say that ASEAN is slow and ineffective, and thus cannot cope with fluid political and economic developments. Respondents see this problem as leading to ASEAN's increasing irrelevance in the world order. Of the ASEAN-10 countries, six countries – Indonesia (54.8%), Myanmar (45.9%), Cambodia (36.6%), Laos (32.5%), Brunei (30.9%), and Thailand (30.6%) have chosen this as their top concern.

The second-ranked concern is that ASEAN risks becoming an arena of major power competition and its members may become major power proxies, at 29.8%. This is the top concern for Vietnam (38.1%), Singapore (38.0%), the Philippines (35.4%), and Malaysia (33.3%). ASEAN's disunity is ranked third at 13.3%, followed by ASEAN's inability to return to pre-pandemic economic growth (12.2%) in fourth place. Concerns about ASEAN's elitism and ordinary people's disenchantment with the organisation is ranked last at 9.6%.

This year's ASEAN Chair Malaysia has placed almost equal weightage on the possibility of ASEAN becoming an arena of major power competition, thus risking irrelevance (33.3%) and ASEAN's ineffectual decision-making (32.1%) – a reflection that Malaysia is aware of the need to address these two concerns as ASEAN Chair.

ASEAN Observer Timor-Leste's overwhelming top concern is with the organisation becoming caught up with major power competition at 62.1%.



Q10 What is your top concern about ASEAN? (Check 1 response)

Country	ASEAN is becoming an arena of major power competition and its member states may become major power proxies	ASEAN is becoming increasingly disunited	ASEAN is elitist and disconnected from ordinary people	ASEAN is slow and ineffective, and thus cannot cope with fluid political and economic developments, and is becoming irrelevant in the new world order	ASEAN is unable to return to pre-pandemic economic growth
ASEAN-10	29.8%	13.3%	9.6%	35.0%	12.2%
BN	26.2%	13.4%	16.8%	30.9%	12.8%
KH	29.7%	11.0%	8.7%	36.6%	14.0%
ID	19.8%	7.1%	10.7%	54.8%	7.5%
LA	28.5%	11.9%	12.6%	32.5%	14.6%
MY	33.3%	9.6%	10.8%	32.1%	14.2%
MM	19.6%	13.4%	16.5%	45.9%	4.6%
PH	35.4%	14.6%	7.8%	29.6%	12.6%
SG	38.0%	14.9%	5.4%	30.2%	11.6%
TH	29.6%	19.9%	4.6%	30.6%	15.3%
VN	38.1%	17.4%	2.6%	27.1%	14.8%
TL	62.1%	6.1%	7.6%	18.2%	6.1%

MOVING THE MYANMAR ISSUE FORWARD

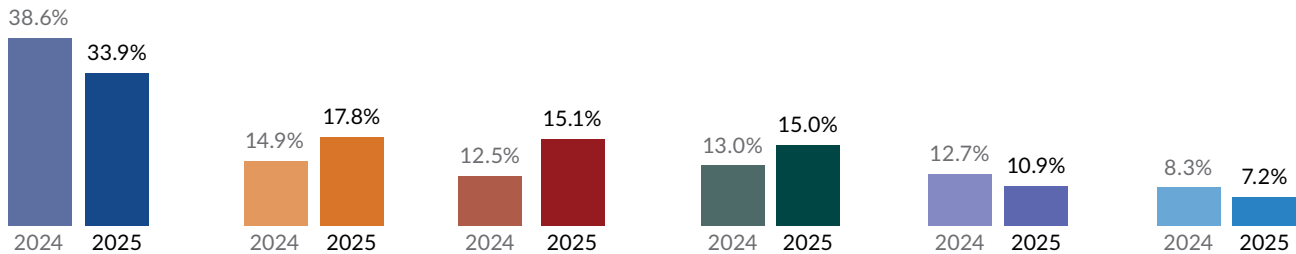
Engaging in independent dialogue with all key stakeholders is still the top choice for ASEAN-10 at 33.9%, down from 38.6% in 2024. It remains the only workable choice with unanimous support from all regional countries. The second preferred option is to utilise harder methods in order to increase the costs of non-compliance for the State Administration Council (SAC) at 17.8%, an increase from 14.9% in 2024. Indonesia (21.0%), Brunei (20.8%), and Myanmar (20.6%) are most supportive of this option. The third-ranked option is to downgrade or limit ASEAN's engagement with the SAC until the situation improves at 15.1%, tied with mounting a coordinated international response at 15.0%. For these two options, Laos (22.5%) is most supportive of downgrading ASEAN's engagement with the SAC and Brunei (20.1%) came out strongest in wanting a coordinated international response.

Both are past ASEAN Chairs with experience in managing the Myanmar crisis.

The non-interference option found support from 10.9% of ASEAN-10 respondents with Laos being the most supportive (15.2%). This is consistent with Laos' position, albeit dropping from 25.0% in 2024.

Only 7.2% of respondents support reinstating the SAC's involvement in ASEAN meetings, with the highest support coming from Myanmar respondents (10.3%) and the lowest support from Thai respondents (2.6%). This is surprising since Thailand has been the key interlocutor for Myanmar as its closest neighbour.

Nearly 60% of Timor-Leste respondents voted for engaging in independent dialogue, followed by non-interference (12.1%).



Q11 To move the Myanmar issue forward, ASEAN should:

Country	Downgrade/limit engagement with SAC until the situation 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	
	2024	2025	2024	2025	2024	2025	2024	2025	2024	2025	2024	2025
ASEAN-10	12.5%	15.1%	38.6%	33.9%	13.0%	15.0%	12.7%	10.9%	14.9%	17.8%	8.3%	7.2%
BN	16.9%	15.4%	31.2%	26.2%	7.8%	20.1%	11.7%	10.1%	20.8%	20.8%	11.7%	7.4%
KH	13.2%	15.1%	40.2%	31.4%	10.6%	15.7%	11.6%	12.2%	7.9%	16.9%	16.4%	8.7%
ID	11.3%	13.5%	44.2%	48.0%	7.2%	6.7%	6.8%	5.6%	24.5%	21.0%	6.0%	5.2%
LA	11.3%	22.5%	43.8%	25.2%	9.4%	15.9%	25.0%	15.2%	6.9%	15.2%	3.8%	6.0%
MY	13.3%	16.3%	38.2%	38.3%	14.2%	12.1%	8.9%	8.8%	17.3%	17.5%	8.0%	7.1%
MM	6.3%	16.5%	43.9%	28.4%	16.4%	17.5%	13.8%	6.7%	10.1%	20.6%	9.5%	10.3%
PH	14.4%	12.1%	43.3%	41.3%	20.5%	14.1%	7.0%	13.1%	7.4%	11.2%	7.4%	8.3%
SG	16.5%	17.8%	28.9%	29.3%	17.2%	18.6%	15.0%	9.9%	18.3%	15.7%	4.0%	8.7%
TH	16.4%	15.8%	36.3%	36.2%	10.0%	11.2%	12.9%	14.8%	19.9%	19.4%	4.5%	2.6%
VN	5.5%	5.8%	36.0%	34.8%	16.5%	18.1%	14.5%	12.9%	16.0%	20.0%	11.5%	8.4%
TL	N.A.	4.5%	N.A.	59.1%	N.A.	10.6%	N.A.	12.1%	N.A.	10.6%	N.A.	3.0%

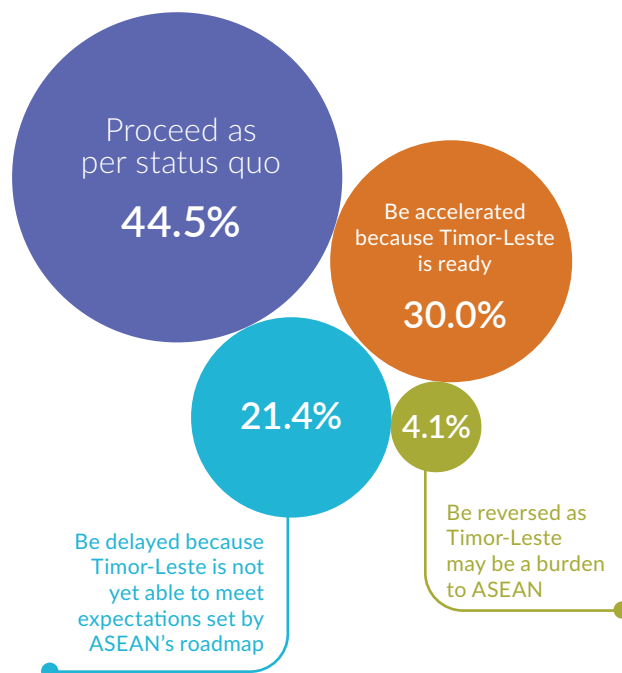
TIMOR-LESTE'S ADMISSION INTO ASEAN

44.5% of the ASEAN-10 respondents would prefer to see Timor-Leste's admission proceed as per status quo i.e. to follow the roadmap that has been set out and admit the country when it is ready. At the country level, all the ASEAN countries voted this way except for Vietnam, which expressly prefer to accelerate Timor-Leste's admission because it is ready (53.5%).

About one-fifth of ASEAN-10 respondents feel that admission should be delayed because Timor-Leste is not yet able to meet the expectations set by ASEAN's roadmap. 29.8% of Singapore respondents support this option, higher than the ASEAN-10 average of 21.4%.

Only 4.1% feel that Timor-Leste's admission should be reversed because it could be a burden on ASEAN. At the country level, Laos' support is the highest at 6.0%.

A majority of Timor-Leste respondents want to see their admission accelerated (62.1%), followed by 24.2% who want to proceed as per status quo and another 13.6% who feel that their admission may be delayed because the country is not ready.



Q12 The admission of Timor-Leste should:

Country	Be accelerated because Timor-Leste is ready	Be delayed because Timor-Leste is not yet able to meet expectations set by ASEAN's roadmap	Be reversed as Timor-Leste may be a burden to ASEAN	Proceed as per status quo
ASEAN	30.0%	21.4%	4.1%	44.5%
BN	22.8%	22.8%	2.7%	51.7%
KH	34.3%	15.7%	5.8%	44.2%
ID	21.8%	24.2%	5.6%	48.4%
LA	32.5%	22.5%	6.0%	39.1%
MY	31.7%	25.4%	2.9%	40.0%
MM	35.1%	20.1%	4.6%	40.2%
PH	31.6%	20.9%	3.9%	43.7%
SG	10.3%	29.8%	4.1%	55.8%
TH	26.5%	24.5%	3.6%	45.4%
VN	53.5%	8.4%	1.9%	36.1%
TL	62.1%	13.6%	0.0%	24.2%

ENHANCING ASEAN'S RESILIENCE AND RELEVANCE

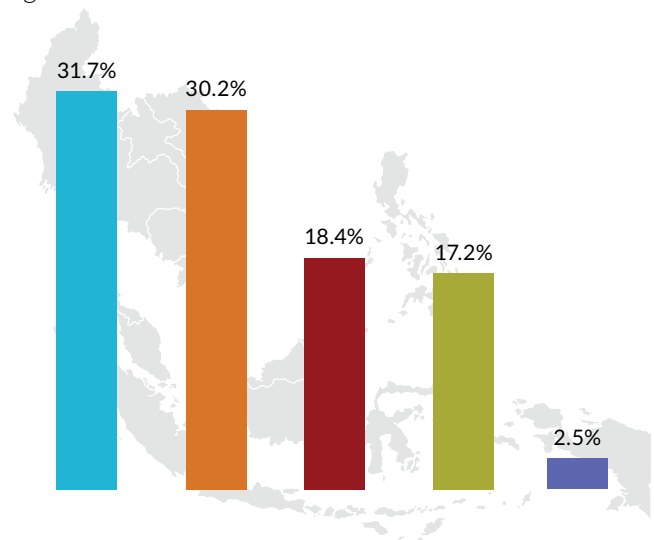
In an uncertain geopolitical climate, ASEAN must demonstrate its resilience and relevance. Among the ASEAN-10, there is recognition that ASEAN must resolve its differences over issues such as the conflict in Myanmar and the South China Sea disputes to prove its credibility and relevance (31.7%), although this remains politically challenging given the limited options available to resolve such regional conflicts. This view is particularly prevalent among respondents in Vietnam (45.8%), Myanmar (42.3%), the Philippines (36.4%), Cambodia (35.5%), and Indonesia (31.0%).

While the majority are concerned about security issues, a significant group (30.2%) believes that ASEAN should instead focus on economic matters by prioritising intra-regional trade and investment. This is the top choice among Laos (40.4%), Thailand (40.3%), Singapore (38.8%), Malaysia (32.5%), and Brunei (28.2%) respondents. A smaller share of ASEAN-10 respondents believe ASEAN should strengthen economic resilience by building alternative supply chains (18.4%) and deepening cooperation with strategic partners through minilateral groupings (17.2%).

The US-China trade war has already impacted several countries in the region and raised concerns, given that both major powers are ASEAN's largest trading partners. Building alternative supply chains is particularly significant for Singapore (26.0%), Malaysia (22.9%), Brunei (22.1%), and Vietnam (20.6%), rating it higher than

the ASEAN-10 average of 18.4%. Meanwhile, support for closer cooperation with strategic partners and greater participation in minilateral initiatives is notably high in Indonesia (30.2%). Indonesia has also become the first ASEAN country to formally join BRICS, reflecting its commitment to diversifying economic partnerships.

In line with ASEAN-10's sentiments, the largest proportion of respondents in Timor-Leste (36.4%) view the resolution of differences over issues such as the Myanmar crisis and the South China Sea as the top choice to enhance ASEAN's resilience and relevance. This is followed by another third of respondents (33.3%) that prioritise increasing intra-regional trade and investment.



Q13 How should ASEAN enhance its resilience and prove its relevance?

Country	Build alternative supply chains so as not to be caught up in the next trade war	Cooperate with strategic partners and join more minilateral groupings	Focus on increasing intra-regional trade and investment	Resolve its differences over issues such as Myanmar and SCS	Do nothing because ASEAN is already resilient and does not need to prove its relevance
ASEAN-10	18.4%	17.2%	30.2%	31.7%	2.5%
BN	22.1%	24.8%	28.2%	20.1%	4.7%
KH	19.2%	12.2%	31.4%	35.5%	1.7%
ID	18.3%	30.2%	19.4%	31.0%	1.2%
LA	13.9%	14.6%	40.4%	27.2%	4.0%
MY	22.9%	14.2%	32.5%	29.2%	1.3%
MM	12.4%	17.5%	25.8%	42.3%	2.1%
PH	13.6%	18.9%	25.2%	36.4%	5.8%
SG	26.0%	12.4%	38.8%	21.9%	0.8%
TH	14.8%	15.8%	40.3%	27.6%	1.5%
VN	20.6%	11.6%	20.0%	45.8%	1.9%
TL	10.6%	18.2%	33.3%	36.4%	1.5%

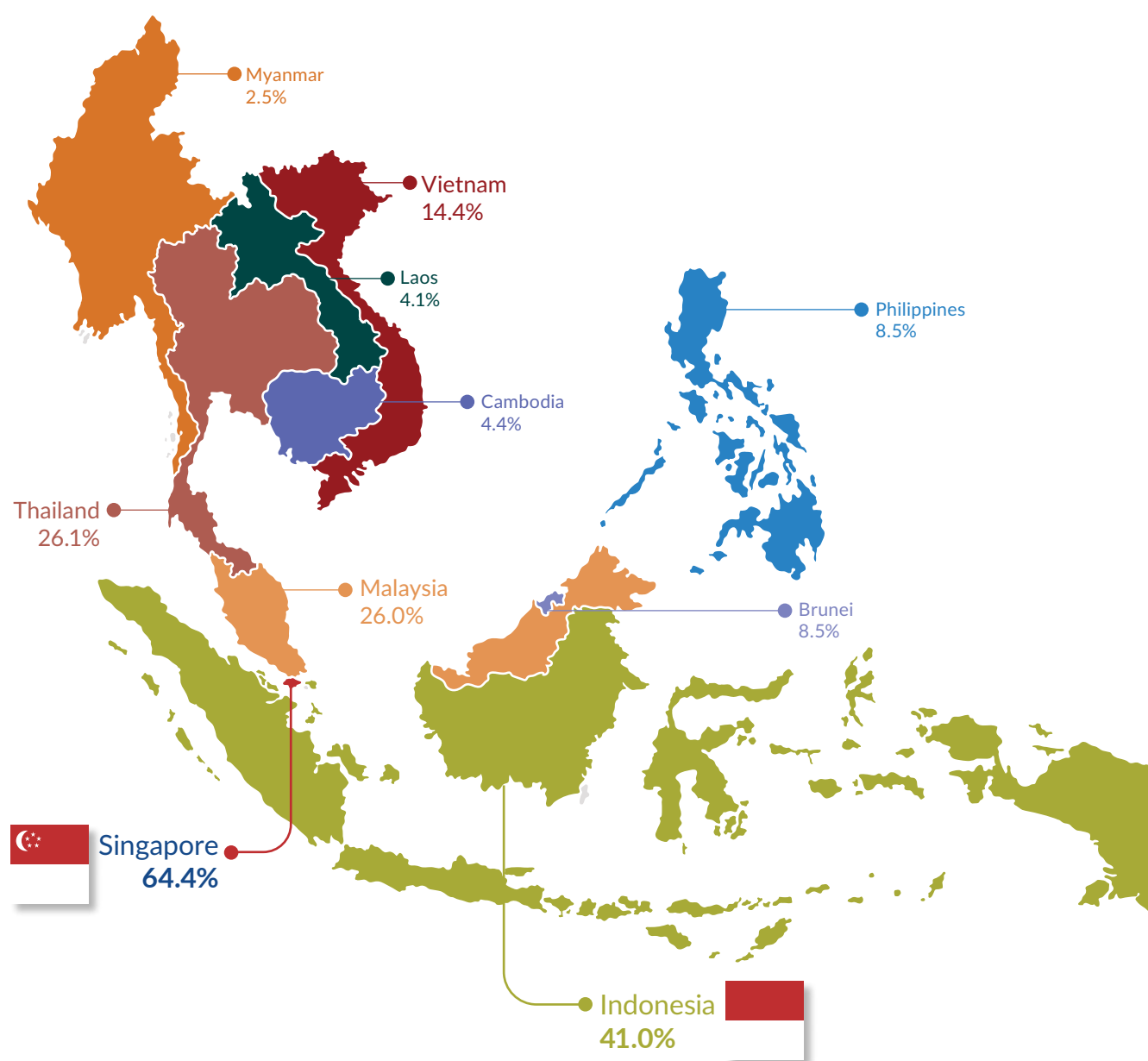
MEMBER STATES' CONTRIBUTION TO ASEAN'S LONG-TERM DEVELOPMENT AND PROGRESS

For the second year in a row, Singapore (64.4%) and Indonesia (41.0%) continue to be acknowledged as the region's leading contributors to regional peace and development by ASEAN-10 respondents. Six in ten ASEAN member states (including Singapore) have chosen Singapore. Singapore is Indonesia, Malaysia, Thailand and Vietnam respondents' second choice.

Indonesia is Indonesians' top choice (77.8%) and Cambodia, Myanmar and Singapore's second choice. Malaysia is its own top choice this year (70.8%) and two countries' – Brunei (37.6%) and Laos (31.1%) – second choice.

This could be due to the ASEAN Chair effect as Malaysia helps the grouping this year, but Thailand outpaces Malaysia narrowly by 0.1% to take third place at the regional ASEAN-10 level.

Timor-Leste's choices are equally split between Singapore and Indonesia at 74.2%, with a smaller percentage voting for Malaysia (27.3%).



Q14 Which members have made the biggest contribution to ASEAN's long-term development and progress? (Choose 2 responses)

2025										
Country	BN	KH	ID	LA	MY	MM	PH	SG	TH	VN
ASEAN-10	8.5%	4.4%	41.0%	4.1%	26.0%	2.5%	8.5%	64.4%	26.1%	14.4%
BN	16.1%	8.1%	34.2%	4.0%	37.6%	3.4%	6.7%	61.7%	18.8%	9.4%
KH	8.7%	20.9%	44.8%	2.9%	24.4%	1.7%	3.5%	68.6%	14.5%	9.9%
ID	12.3%	0.0%	77.8%	0.4%	16.7%	1.6%	1.2%	64.3%	17.1%	8.7%
LA	6.6%	4.6%	25.8%	19.2%	31.1%	5.3%	13.2%	51.7%	25.8%	16.6%
MY	10.8%	0.4%	43.8%	1.3%	70.8%	0.8%	0.8%	53.3%	15.4%	2.5%
MM	4.6%	4.6%	49.5%	5.2%	23.7%	6.2%	5.7%	62.4%	31.4%	6.7%
PH	11.7%	2.4%	27.2%	0.5%	17.0%	1.5%	39.3%	71.4%	21.4%	7.8%
SG	7.0%	1.2%	57.0%	1.7%	19.4%	0.8%	4.1%	85.1%	16.5%	7.0%
TH	5.6%	2.0%	24.0%	2.6%	13.3%	2.0%	5.6%	62.8%	70.9%	11.2%
VN	1.9%	0.0%	25.8%	3.2%	5.8%	1.3%	5.2%	63.2%	29.0%	64.5%
TL	6.1%	0.0%	74.2%	0.0%	27.3%	0.0%	1.5%	74.2%	10.6%	6.1%

2024										
Country	BN	KH	ID	LA	MY	MM	PH	SG	TH	VN
ASEAN-10	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%

TENSIONS IN THE SOUTH CHINA SEA

48.2% of ASEAN-10 respondents view China's encroachments in the Exclusive Economic Zones (EEZs) and continental shelves of ASEAN littoral states to be most worrying. China's encroachment actions in their EEZs or continental shelves is the top concern for Vietnam (63.2%), the Philippines (57.8%), Indonesia (57.5%), Malaysia (53.8%), and Myanmar (47.4%). Of these countries, only Myanmar is not a littoral state. The ASEAN-10's concern over encroachments in 2025 reflects a change from its 2021 response when 58.6% (weighted average) said that it is China's militarisation and assertive actions that were of greatest concern, whereas encroachments ranked second place at 56.5% (weighted average).

Another 44.3% of ASEAN-10 respondents believe that an accidental conflict between an ASEAN member state and China could result in a political crisis.

For non-littoral states, such an accidental conflict ranks top together with a direct military confrontation between the US and China. Singapore (57.0%), Laos (53.6%), and Cambodia (44.2%) are most concerned about this aspect.

The third highest concern is China's increasing militarisation and assertive actions in the SCS at 40.6%. Brunei – a direct SCS claimant state – has chosen China's militarisation and assertive actions as its top concern at 51.0%, with encroachments by China a close second at 48.3%.

Concern over a direct military confrontation between the US and China is not far behind at 36.5%. This is the top concern for Thailand at 49.5%.

For Timor-Leste, the fear of an accidental conflict impacting regional stability outweighs other concerns at 56.1%.

China's encroachments in the exclusive economic zones and continental shelves of Southeast Asia's littoral states

48.2%

An accidental confrontation between an ASEAN Member State and China that results in a political crisis

44.3%

China's militarisation and assertive actions in the SCS

40.6%

Q15 What is your top concern over the South China Sea (SCS) situation? (Choose 2 options)

Country	A direct military confrontation between the US and China	An accidental confrontation between an ASEAN Member State and China that results in a political crisis	China's encroachments in the exclusive economic zones and continental shelves of Southeast Asia's littoral states	China's militarisation and assertive actions in the SCS	Depletion of fish stocks and loss of biodiversity	Increased military presence in the SCS
ASEAN-10	36.5%	44.3%	48.2%	40.6%	12.8%	17.6%
BN	32.2%	45.0%	48.3%	51.0%	8.7%	14.8%
KH	38.4%	44.2%	40.1%	42.4%	12.2%	22.7%
ID	40.5%	50.8%	57.5%	18.7%	17.1%	15.5%
LA	44.4%	53.6%	33.8%	40.4%	10.6%	17.2%
MY	39.2%	40.4%	53.8%	36.3%	8.8%	21.7%
MM	29.4%	45.4%	47.4%	46.9%	11.3%	19.6%
PH	28.2%	28.2%	57.8%	46.6%	18.0%	21.4%
SG	38.0%	57.0%	38.4%	40.5%	10.7%	15.3%
TH	49.5%	45.4%	41.8%	28.1%	23.5%	11.7%
VN	25.8%	32.9%	63.2%	54.8%	7.1%	16.1%
TL	43.9%	56.1%	39.4%	25.8%	10.6%	24.2%

ASEAN'S RESPONSE TO THE SOUTH CHINA SEA SITUATION

Nine out of ten ASEAN member states believe that taking a principled stand on international law, including the 1982 United Nations Convention on the Law of the SEA (UNCLOS) and respect for the 2016 Arbitral Tribunal ruling is most important (69.5%). Indonesia shows the strongest support for this option at 85.3%, even higher than the Philippines which was the disputant in the 2016 Arbitral Tribunal award. The ASEAN-10's strong support of international law has remained unchanged from the first time that this question was posed in 2021, where 80.5% (weighted average) of the regional respondents support this view.

The threat perception of ASEAN-10 is reflected in the option of supporting deterrence actions through participation in joint military exercises ranking second at 46.1%.

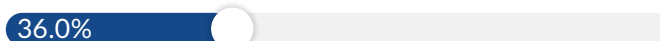
ASEAN should take a principled stand that upholds international law, including UNCLOS, and respect the 2016 arbitral tribunal's ruling



ASEAN should support actions that would deter aggressive behaviour such as by participating in joint military exercises



ASEAN should encourage claimant states to resolve tensions through bilateral negotiations



Q16 How should ASEAN respond to the SCS situation? (Choose 2 options)

Country	ASEAN cannot do anything because it lacks solidarity on this issue	ASEAN should support actions that would deter aggressive behaviour such as by participating in joint military exercises	ASEAN should discourage non-claimants from getting involved in the SCS issue	ASEAN should take a principled stand that upholds international law, including UNCLOS, and respect the 2016 arbitral tribunal's ruling	ASEAN should welcome military presence of other powers in the SCS	ASEAN should encourage claimant states to resolve tensions through bilateral negotiations
ASEAN-10	13.3%	46.1%	22.4%	69.5%	12.7%	36.0%
BN	7.4%	54.4%	28.2%	63.1%	18.1%	28.9%
KH	17.4%	43.6%	33.1%	49.4%	19.8%	36.6%
ID	6.3%	39.7%	24.2%	85.3%	2.4%	42.1%
LA	19.2%	56.3%	31.8%	49.7%	20.5%	22.5%
MY	8.8%	43.8%	25.4%	76.3%	5.8%	40.0%
MM	26.3%	39.7%	25.3%	54.6%	21.1%	33.0%
PH	7.8%	54.4%	7.3%	80.1%	10.2%	40.3%
SG	13.6%	44.2%	16.1%	81.0%	9.1%	36.0%
TH	16.8%	40.3%	20.9%	75.5%	8.7%	37.8%
VN	9.7%	44.5%	11.6%	80.0%	11.6%	42.6%
TL	3.0%	28.8%	12.1%	86.4%	1.5%	68.2%

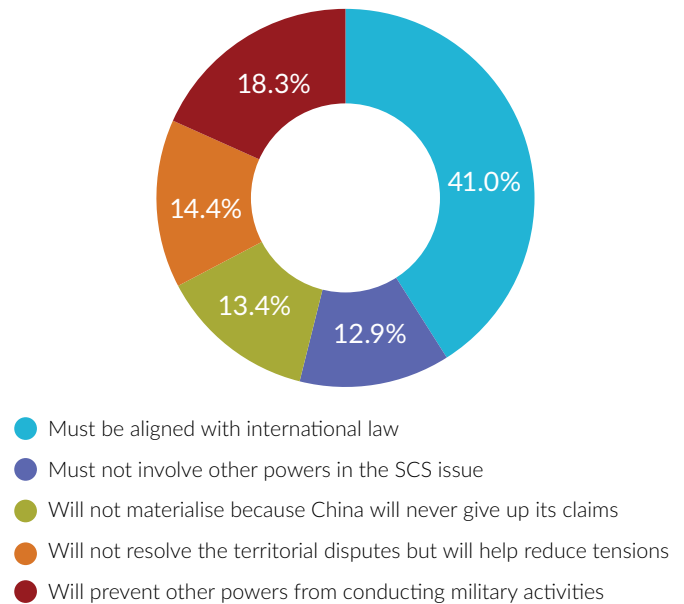
CODE OF CONDUCT ON THE SOUTH CHINA SEA

Despite starting more than a decade ago, there has been little progress on the Code of Conduct (CoC) negotiations between ASEAN member states (AMS) and China. Remarkably consistent in its position so far, nine out of ten AMS, with the exception of Brunei, say that the CoC must be aligned with international law, including the 1982 UNCLOS (41.0%).

The second-ranked view by ASEAN-10 is the hope that the CoC would prevent other powers from conducting military activities and energy exploration with AMS in the disputed area at 18.3%. This is Brunei's top view (28.9%) whereas seven other AMS – Myanmar (21.6%), Cambodia (20.9%), Laos (19.9%), Thailand (19.9%), Indonesia (18.7%), the Philippines (14.6%), and Vietnam (13.5%) rank it their second view.

The third middle-of-the-road view is that the CoC will not resolve territorial disputes but would help reduce tensions and manage the dispute, shared by only 14.4% of the respondents. The CoC was never intended to resolve territorial disputes but to manage tensions. Malaysia (20.4%) put this view as its second-ranked view and Singapore (19.8%) as its third-ranked view.

The more resigned view that the CoC will never materialise due to China refusing to give up its territorial and jurisdictional claims based on its Nine-Dash Line is shared by only 13.4% of respondents. Not involving other powers once an agreement is reached between ASEAN and China on the CoC is shared by only 12.9% of respondents.



Q17 In my view, the Code of Conduct... (Choose 1 option)

Country	Must be aligned with international law, including UNCLOS	Must not involve other powers in the SCS issue once ASEAN and China have reached agreement on the COC	Will not materialise because China will never give up its territorial and jurisdictional claims based on the Nine-Dash Line	Will not resolve the territorial disputes but will help reduce tensions and manage the dispute	Will prevent other powers from conducting military activities and energy exploration with ASEAN member states in the SCS
ASEAN-10	41.0%	12.9%	13.4%	14.4%	18.3%
BN	22.8%	21.5%	10.7%	16.1%	28.9%
KH	34.9%	16.9%	13.4%	14.0%	20.9%
ID	48.0%	9.1%	10.3%	13.9%	18.7%
LA	42.4%	18.5%	8.6%	10.6%	19.9%
MY	32.9%	17.1%	15.0%	20.4%	14.6%
MM	33.0%	13.4%	16.0%	16.0%	21.6%
PH	54.4%	7.3%	13.1%	10.7%	14.6%
SG	37.6%	9.1%	22.7%	19.8%	10.7%
TH	40.8%	15.3%	12.2%	11.7%	19.9%
VN	63.2%	1.3%	11.6%	10.3%	13.5%
TL	63.6%	10.6%	6.1%	10.6%	9.1%

IMPACT OF ISRAEL'S CONFLICT WITH HAMAS AND HEZBOLLAH

The ongoing conflict involving Israel, Hamas, and Hezbollah has had ripple effects beyond the Middle East, with significant implications for Southeast Asia. The most widely perceived impact among ASEAN-10 respondents is the diminished trust in international law and the rules-based order (29.0%), particularly among the Muslim-majority countries of Indonesia (50.0%), Malaysia (38.3%), and Brunei (34.2%), as well as Vietnam (34.2%) and Myanmar (26.3%). This reflects broader concerns about the erosion of global norms, particularly in a period of heightened geopolitical tensions.

The second top concern is the rise in extremist activities impacting domestic and regional security (27.1%).

Similar to 2024 findings, countries with Muslim-minority including the Philippines (39.8%), Singapore (36.8%), Cambodia (30.8%), and Thailand (27.6%), top this perspective.

Next, the potential for erosion of domestic social cohesion due to religious divisions is tied with the concern over greater ASEAN disunity at 17.6%. These concerns are less significant for respondents from Indonesia and Malaysia. Only 8.6% of the respondents, particularly from Laos (13.2%) and Myanmar (12.9%) feel that the conflict does not impact Southeast Asia.

Timor-Leste respondents are most worried about the rise in extremist activities impacting domestic and regional security (45.5%).

Diminished trust in international law and rules-based order

29.0%

Rise in extremist activities impacting domestic and regional security

27.1%

Erosion of domestic social cohesion due to religious divisions

17.6%

Greater ASEAN disunity due to differences in member states' positions

17.6%

Does not impact Southeast Asia

8.6%

Q18 What is the most likely impact of Israel's conflict with Hamas and Hezbollah 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	
	2024	2025	2024	2025	2024	2025	2024	2025	2024	2025
ASEAN-10	27.5%	29.0%	17.5%	17.6%	15.4%	17.6%	29.7%	27.1%	9.9%	8.6%
BN	31.2%	34.2%	10.4%	23.5%	28.6%	18.8%	22.1%	16.8%	7.8%	6.7%
KH	21.7%	26.7%	16.4%	19.2%	11.1%	13.4%	39.2%	30.8%	11.6%	9.9%
ID	47.5%	50.0%	13.6%	9.5%	14.0%	13.9%	21.5%	20.6%	3.4%	6.0%
LA	19.4%	18.5%	15.6%	23.8%	13.1%	20.5%	29.4%	23.8%	22.5%	13.2%
MY	34.7%	38.3%	15.1%	10.8%	17.3%	11.3%	28.9%	29.6%	4.0%	10.0%
MM	32.8%	26.3%	22.8%	20.1%	9.0%	19.6%	19.6%	21.1%	15.9%	12.9%
PH	21.9%	19.9%	15.8%	13.6%	17.2%	20.9%	37.7%	39.8%	7.4%	5.8%
SG	19.4%	24.4%	20.9%	18.2%	15.0%	16.9%	41.0%	36.8%	3.7%	3.7%
TH	14.4%	17.3%	31.8%	23.5%	19.4%	22.4%	24.9%	27.6%	9.5%	9.2%
VN	32.5%	34.2%	12.5%	14.2%	9.0%	18.7%	32.5%	24.5%	13.5%	8.4%
TL	N.A.	21.2%	N.A.	7.6%	N.A.	22.7%	N.A.	45.5%	N.A.	3.0%

VIEW OF THE INTERNATIONAL COMMUNITY'S RESPONSES TO ISRAEL'S CONFLICT WITH HAMAS AND HEZBOLLAH

The ASEAN-10's responses to Israel's conflict with Hamas and Hezbollah highlight a strong preference for a ceasefire and the prioritisation of humanitarian assistance (36.4%), reflecting ASEAN's long-standing commitment to diplomatic solutions and upholding international humanitarian law. This is the top choice across all ASEAN-10 countries except for Indonesia.

The second most favoured approach by ASEAN-10 is the support for a two-state solution (21.4%), consistent with ASEAN's long-standing position on the Israeli-Palestinian conflict. This perspective is particularly strong among respondents from Singapore (30.2%), who view it as a viable framework for long-term peace.

The third most prevalent perspective is the support for the self-determination of the Palestinian people (19.7%). It is the top choice in Indonesia, where 35.3% of respondents prioritise this. It also garners significant support in Malaysia (31.3%) and Brunei (26.2%), where governments have been advocating for Palestinian rights.

Additionally, 15.0% of ASEAN-10 respondents prioritise fostering dialogue to explore potential solutions. The least popular option remains unconditional support for Israel (1.4%), marking a significant decline from 5.8% in 2024.

Timor-Leste respondents overwhelmingly select fostering dialogue as their top choice (40.9%).

Support a ceasefire and prioritise the provision of humanitarian aid

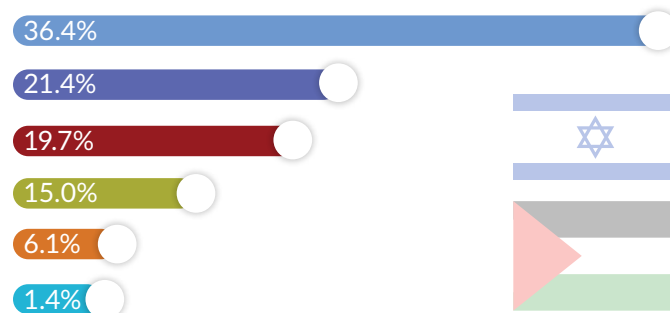
Support a two-state solution as the only solution for Israel and Palestine

Support the right to self-determination of the Palestinian people

Foster dialogue on potential solutions for the conflict

Not interfere in the conflict

Support Israel unconditionally even if it exposes its own double standards



Q19 The international community should...

Country	Support the right to self-determination of the Palestinian people		Support a ceasefire and prioritise the provision of humanitarian aid		Not interfere in the conflict		Support a two-state solution as the only solution for Israel and Palestine		Foster dialogue on potential solutions for the conflict		Support Israel unconditionally even if it exposes its own double standards	
	2024	2025	2024	2025	2024	2025	2024	2025	2024	2025	2024	2025
ASEAN-10	17.5%	19.7%	41.3%	36.4%	4.6%	6.1%	16.2%	21.4%	14.6%	15.0%	5.8%	1.4%
BN	42.9%	26.2%	37.7%	26.2%	1.3%	10.7%	11.7%	24.2%	6.5%	10.1%	0.0%	2.7%
KH	11.1%	16.9%	31.2%	35.5%	3.7%	7.6%	22.2%	21.5%	17.5%	17.4%	14.3%	1.2%
ID	35.1%	35.3%	36.2%	34.1%	0.0%	2.8%	18.1%	21.0%	9.8%	6.3%	0.8%	0.4%
LA	7.5%	17.2%	35.6%	33.1%	18.1%	8.6%	10.0%	19.2%	16.9%	19.2%	11.9%	2.6%
MY	29.3%	31.3%	43.1%	37.9%	1.3%	2.5%	19.6%	18.3%	6.2%	8.8%	0.4%	1.3%
MM	12.2%	19.1%	36.5%	28.4%	6.9%	8.8%	12.7%	21.1%	22.8%	22.2%	9.0%	0.5%
PH	5.6%	12.6%	50.7%	50.0%	1.4%	1.9%	15.8%	17.5%	19.1%	17.0%	7.4%	1.0%
SG	10.3%	11.2%	46.9%	42.1%	2.6%	3.7%	24.9%	30.2%	12.8%	11.2%	2.6%	1.7%
TH	10.0%	13.3%	43.8%	36.2%	6.0%	7.7%	12.9%	19.9%	19.9%	21.9%	7.5%	1.0%
VN	11.0%	14.2%	51.0%	40.6%	4.5%	7.1%	14.5%	20.6%	14.5%	15.5%	4.5%	1.9%
TL	N.A.	13.6%	N.A.	22.7%	N.A.	1.5%	N.A.	19.7%	N.A.	40.9%	N.A.	1.5%

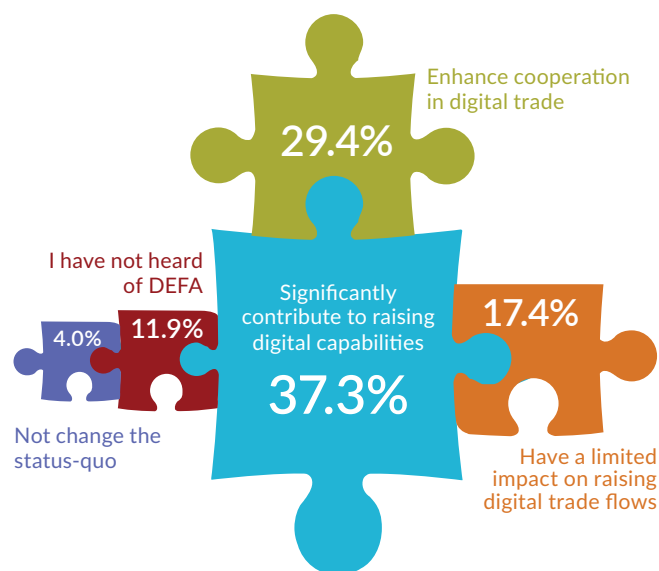
VIEWS ON THE ASEAN DIGITAL ECONOMIC FRAMEWORK AGREEMENT (DEFA)

Over a third of ASEAN-10 respondents (37.3%) feel that the DEFA would significantly contribute to raising digital capabilities and enhancing regional digital trade. These results are similar to the sentiments expressed in 2024 with 38.0% of respondents citing the same. Respondents from Vietnam (48.4%) and the Philippines (44.7%) remain the strongest proponents of the benefits of the DEFA from 2024. Malaysia's increased enthusiasm for the DEFA could be due in part to its position as the ASEAN Chair for 2025 with one of its key deliverables being the substantial conclusion of the DEFA negotiations.

The next most cited response for ASEAN-10 is that the DEFA could enhance cooperation in digital trade integration initiatives at 29.4% compared to 25.1% in 2024. Respondents from Cambodia (36.0%), Singapore (34.3%), and Laos (31.1%) are the most inclined to this view of DEFA. Notably, a lower proportion of ASEAN-10 respondents had not heard of the DEFA this year at 11.9%, relative to 16.8% of respondents in 2024.

Of note, Timor-Leste's awareness of the DEFA is relatively high, with only 9.1% of respondents having not heard of it.

Moreover, Timor-Leste is the most optimistic about the DEFA with 62.1% of respondents citing that the DEFA would significantly contribute to raising digital capabilities and enhancing digital trade in the region.



Q20 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	
	2024	2025	2024	2025	2024	2025	2024	2025	2024	2025
ASEAN-10	38.0%	37.3%	25.1%	29.4%	17.6%	17.4%	2.6%	4.0%	16.8%	11.9%
BN	14.3%	31.5%	23.4%	30.2%	29.9%	16.8%	3.9%	6.0%	28.6%	15.4%
KH	36.0%	30.8%	27.5%	36.0%	19.0%	16.9%	1.6%	4.1%	15.9%	12.2%
ID	49.1%	41.3%	27.5%	25.4%	11.7%	18.7%	3.4%	2.0%	8.3%	12.7%
LA	38.1%	38.4%	16.3%	31.1%	15.6%	16.6%	3.8%	7.3%	26.3%	6.6%
MY	33.3%	43.8%	29.3%	26.7%	17.8%	14.6%	2.7%	3.3%	16.9%	11.7%
MM	22.2%	24.7%	13.8%	25.3%	27.5%	26.3%	3.7%	8.8%	32.8%	14.9%
PH	53.0%	44.7%	27.0%	28.2%	10.7%	9.7%	0.5%	1.0%	8.8%	16.5%
SG	26.0%	33.9%	38.5%	34.3%	16.5%	17.4%	1.5%	1.2%	17.6%	13.2%
TH	49.3%	35.7%	21.4%	30.1%	18.4%	23.5%	4.0%	2.0%	7.0%	8.7%
VN	59.0%	48.4%	26.0%	26.5%	8.5%	14.2%	1.0%	3.9%	5.5%	7.1%
TL	N.A.	62.1%	N.A.	22.7%	N.A.	6.1%	N.A.	0.0%	N.A.	9.1%

RISING PROTECTIONISM AND NATIONALISM

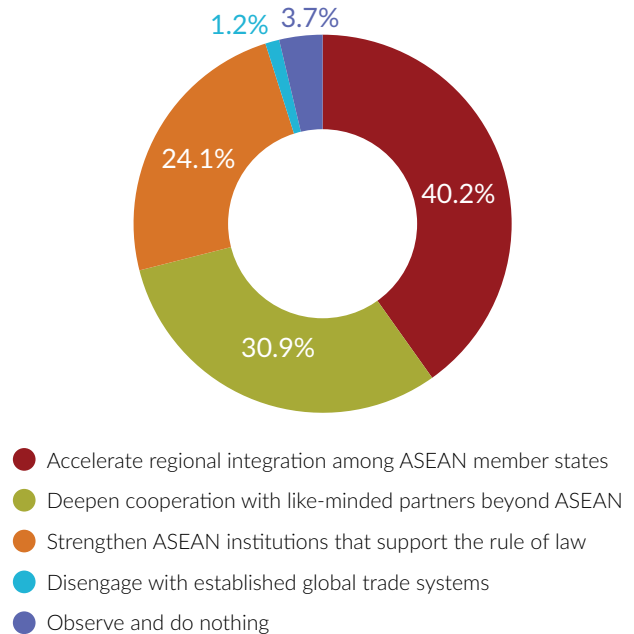
ASEAN prefers to accelerate regional integration among its members when confronting rising protectionism and nationalism around the world. This is the view of 40.2% of the ASEAN-10 respondents, with the exception of the Philippines and Singapore. Vietnam is most supportive of accelerating regional integration (55.5%) despite being one of the last members to join ASEAN in 1995.

The second-ranked option of deepening cooperation with like-minded partners beyond ASEAN is shared by 30.9% of the ASEAN-10 respondents. For Thailand, this option is tied with the preference for accelerating regional integration at 43.9%. However, for Singapore, deepening international cooperation is viewed as its best and most viable option, shared by 40.5% of Singapore respondents.

The third-ranked option of strengthening ASEAN institutions that support the rule of law is shared by nearly a quarter of ASEAN respondents at 24.1%. This is the Philippines' top option at 41.7% and Brunei's second-ranked option at 29.5%.

It is encouraging that the last two options of observing and doing nothing (3.7%) and disengaging with established global trade systems (1.2%) are seen by a majority of ASEAN-10 respondents as non-options. This shows ASEAN's ingrained beliefs in being proactive and maintaining an open multilateral trading system.

For Timor-Leste, accelerating regional integration (43.9%) and deepening cooperation (33.3%) is not only in its best interests but could also address issues of protectionism and nationalism.



Q21 How should ASEAN respond to rising protectionism and nationalism around the world?

Country	Accelerate regional integration among ASEAN member states	Deepen cooperation with like-minded partners beyond ASEAN	Strengthen ASEAN institutions that support the rule of law	Disengage with established global trade systems	Observe and do nothing
ASEAN-10	40.2%	30.9%	24.1%	1.2%	3.7%
BN	35.6%	24.8%	29.5%	4.7%	5.4%
KH	40.1%	27.3%	24.4%	1.7%	6.4%
ID	41.7%	34.5%	22.2%	0.8%	0.8%
LA	31.1%	29.8%	29.1%	2.0%	7.9%
MY	42.9%	31.7%	24.6%	0.0%	0.8%
MM	42.3%	26.3%	24.7%	0.5%	6.2%
PH	33.5%	22.8%	41.7%	0.5%	1.5%
SG	35.1%	40.5%	19.8%	0.8%	3.7%
TH	43.9%	43.9%	9.7%	1.0%	1.5%
VN	55.5%	27.1%	14.8%	0.0%	2.6%
TL	43.9%	33.3%	22.7%	0.0%	0.0%

Major Powers' Regional Influence and Leadership

31-43

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

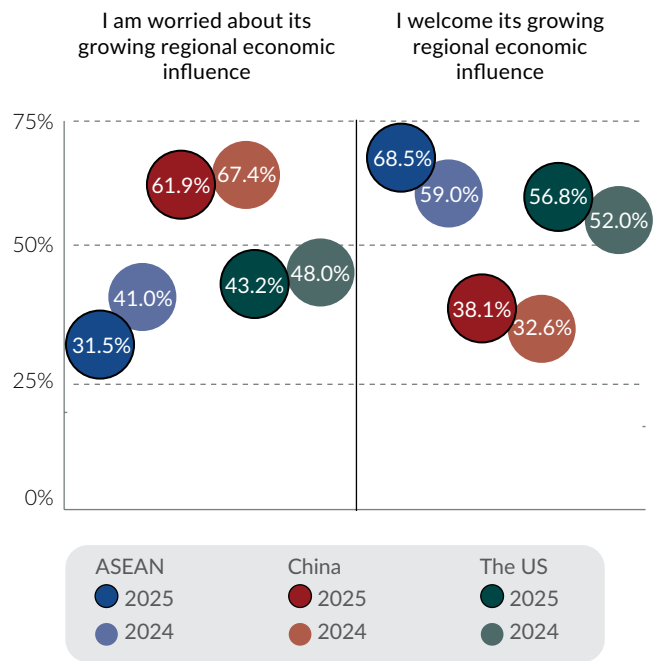
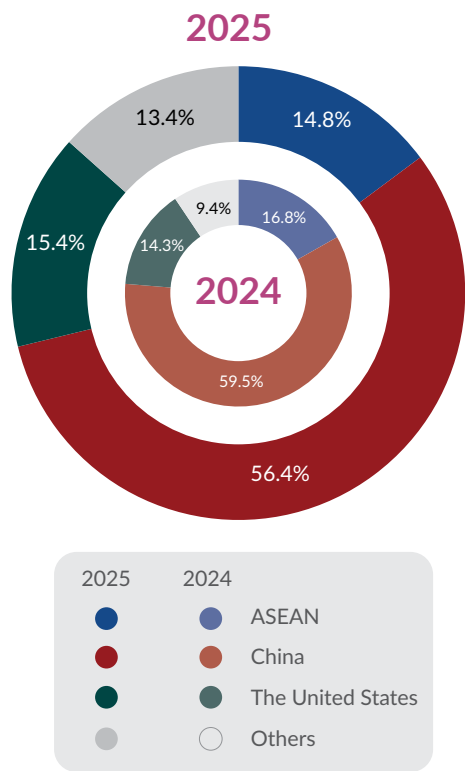
China remains the most influential economic power in Southeast Asia with 56.4% of ASEAN-10 respondents sharing this sentiment, a slight decrease from 59.5% in 2024. Thailand (70.9%), Malaysia (69.6%), and Singapore (68.6%) have the highest proportion of respondents with this inclination. Laos' regard for China as the most influential economic power has taken a significant hit with 49.0% of respondents holding this sentiment as opposed to a large majority of 77.5% in 2024, the highest amongst all the ASEAN member states (AMS) then. On the flipside, 68.6% of Singapore respondents perceive China to be the most economically influential this year compared to 59.7% in 2024. Akin to previous years, a majority of ASEAN-10 respondents (61.9%) are worried about China's growing regional influence, down from 67.4% in 2024. This is most strongly felt by Thailand (85.6%), Vietnam (77.0%), and the Philippines (76.3%). Meanwhile, Cambodia (62.0%), Brunei (50.6%), and Malaysia (46.7%) are the most welcoming of China's economic influence.

This year, the US is regarded as the second most influential economic power in Southeast Asia, cited by 15.4% of ASEAN-10 respondents, up from 14.3% in 2024. The Philippines (30.6%), Cambodia (20.3%), Singapore (16.1%), Laos (15.9%), and Thailand (11.7%) view the US as the second most influential economic power in the region. Although there is a significant gap between the first and second ranked countries in this regard, it is notable that the US has narrowly displaced ASEAN from its standing as the second most influential economic power this year.

A majority of ASEAN-10 respondents (56.8%) continue to welcome the US' growing regional economic influence, with a slightly larger proportion sharing this sentiment compared to 52.0% in 2024. This sentiment is most strongly expressed by respondents from Vietnam (74.1%), Myanmar (70.8%), and the Philippines (69.8%).

ASEAN is the third most influential economic power at 14.8%, slightly down from 16.8% in 2024. This change is mostly attributed to more positive sentiments towards the US by all AMS except for Myanmar and Singapore. Conversely, the drop in positive sentiments towards ASEAN is mostly attributed to the Philippines and Vietnam. Despite ASEAN losing some ground in its overall standing of economic influence, a higher proportion of respondents welcome its growing influence at 68.5% compared to 59.0% in 2024. In particular, Brunei (95.8%), Laos (88.2%), and Indonesia (77.1%) are most positive about ASEAN's influence.

A majority of respondents from Timor-Leste view China (51.5%) as the most influential economic power, followed by ASEAN (31.8%) and the US (13.6%). They are more pessimistic than ASEAN-10 about China's growing regional economic influence, with 70.6% citing their worries. On the other hand, 90.5% of respondents welcome ASEAN's growing economic influence, which is much higher than the ASEAN-10 average.



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	
	2024	2025	2024	2025	2024	2025	2024	2025	2024	2025	2024	2025	2024	2025	2024	2025	2024	2025
ASEAN-10	16.8%	14.8%	0.5%	0.9%	59.5%	56.4%	2.8%	2.6%	0.6%	1.9%	3.7%	5.5%	1.0%	1.5%	14.3%	15.4%	0.8%	1.0%
BN	18.2%	16.1%	1.3%	0.7%	63.6%	51.7%	1.3%	2.0%	1.3%	3.4%	2.6%	9.4%	0.0%	4.0%	7.8%	11.4%	3.9%	1.3%
KH	11.1%	11.0%	0.5%	1.7%	59.8%	45.9%	4.8%	5.2%	1.1%	3.5%	1.1%	7.6%	0.0%	2.9%	20.1%	20.3%	1.6%	1.7%
ID	28.3%	27.8%	1.1%	0.8%	54.0%	56.0%	1.1%	1.2%	0.0%	0.4%	5.3%	4.8%	2.3%	0.4%	7.9%	8.3%	0.0%	0.4%
LA	8.1%	11.3%	0.0%	3.3%	77.5%	49.0%	4.4%	4.6%	0.0%	6.6%	0.6%	4.6%	1.3%	2.6%	8.1%	15.9%	0.0%	2.0%
MY	16.9%	13.8%	0.0%	0.8%	66.7%	69.6%	0.4%	0.8%	1.3%	0.4%	4.4%	3.3%	0.4%	0.8%	9.3%	9.6%	0.4%	0.8%
MM	6.9%	12.9%	0.0%	1.0%	59.8%	59.3%	5.8%	5.7%	0.5%	1.0%	5.8%	4.6%	1.6%	1.0%	19.6%	12.4%	0.0%	2.1%
PH	26.0%	18.4%	0.0%	0.0%	30.7%	36.9%	3.7%	1.0%	0.5%	0.0%	8.8%	11.7%	1.9%	1.0%	27.9%	30.6%	0.5%	0.5%
SG	14.7%	10.3%	1.1%	0.0%	59.7%	68.6%	0.4%	0.8%	0.4%	1.7%	2.6%	1.7%	0.0%	0.8%	20.5%	16.1%	0.7%	0.0%
TH	8.5%	6.6%	1.0%	0.5%	70.6%	70.9%	3.5%	2.0%	0.5%	0.5%	2.5%	5.1%	1.5%	1.0%	11.4%	11.7%	0.5%	1.5%
VN	29.0%	20.0%	0.0%	0.0%	53.0%	56.1%	3.0%	2.6%	0.5%	1.3%	3.0%	2.6%	1.0%	0.0%	10.5%	17.4%	0.0%	0.0%
TL	N.A.	31.8%	N.A.	0.0%	N.A.	51.5%	N.A.	1.5%	N.A.	0.0%	N.A.	1.5%	N.A.	0.0%	N.A.	13.6%	N.A.	0.0%

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

295 respondents excluding Timor-Leste who chose the "ASEAN" option in Q22; 1121 excluding Timor-Leste respondents who chose the "China" option in Q22; 296 respondents excluding Timor-Leste who chose 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	
	2024	2025	2024	2025	2024	2025	2024	2025	2024	2025	2024	2025
ASEAN-10	41.0%	31.5%	59.0%	68.5%	67.4%	61.9%	32.6%	38.1%	48.0%	43.2%	52.0%	56.8%
BN	14.3%	4.2%	85.7%	95.8%	49.0%	49.4%	51.0%	50.6%	16.7%	52.9%	83.3%	47.1%
KH	76.2%	42.1%	23.8%	57.9%	59.3%	38.0%	40.7%	62.0%	60.5%	37.1%	39.5%	62.9%
ID	21.3%	22.9%	78.7%	77.1%	46.2%	58.9%	53.8%	41.1%	57.1%	47.6%	42.9%	52.4%
LA	92.3%	11.8%	7.7%	88.2%	77.4%	54.1%	22.6%	45.9%	92.3%	45.8%	7.7%	54.2%
MY	21.1%	24.2%	78.9%	75.8%	48.0%	53.3%	52.0%	46.7%	47.6%	52.2%	52.4%	47.8%
MM	30.8%	48.0%	69.2%	52.0%	87.6%	65.2%	12.4%	34.8%	43.2%	29.2%	56.8%	70.8%
PH	33.9%	31.6%	66.1%	68.4%	75.8%	76.3%	24.2%	23.7%	18.3%	30.2%	81.7%	69.8%
SG	30.0%	28.0%	70.0%	72.0%	63.2%	61.4%	36.8%	38.6%	32.1%	41.0%	67.9%	59.0%
TH	47.1%	53.8%	52.9%	46.2%	80.3%	85.6%	19.7%	14.4%	78.3%	69.6%	21.7%	30.4%
VN	43.1%	48.4%	56.9%	51.6%	87.7%	77.0%	12.3%	23.0%	33.3%	25.9%	66.7%	74.1%
TL	N.A.	9.5%	N.A.	90.5%	N.A.	70.6%	N.A.	29.4%	N.A.	22.2%	N.A.	77.8%

Timor-Leste: 21 respondents who chose the "ASEAN" option in Q22; 34 respondents who chose the "China" option in Q22; 9 respondents who chose the "US" option in Q22

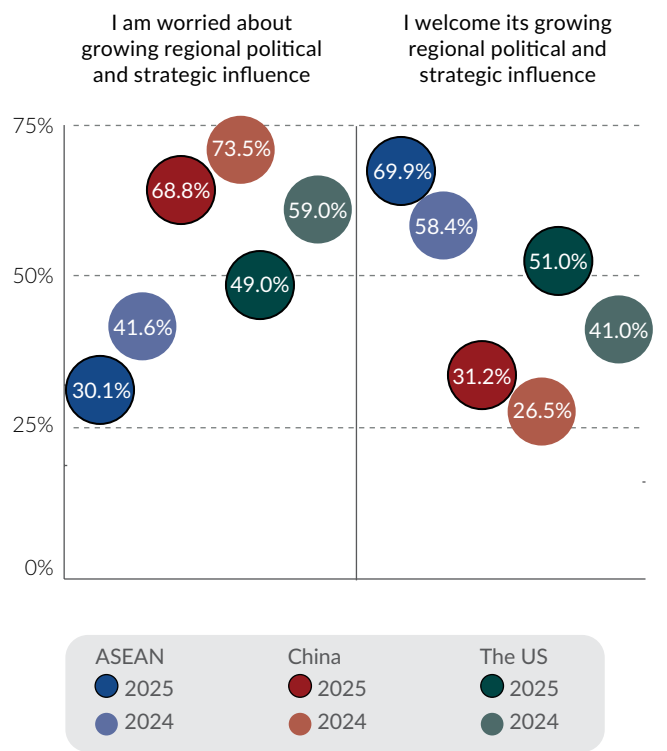
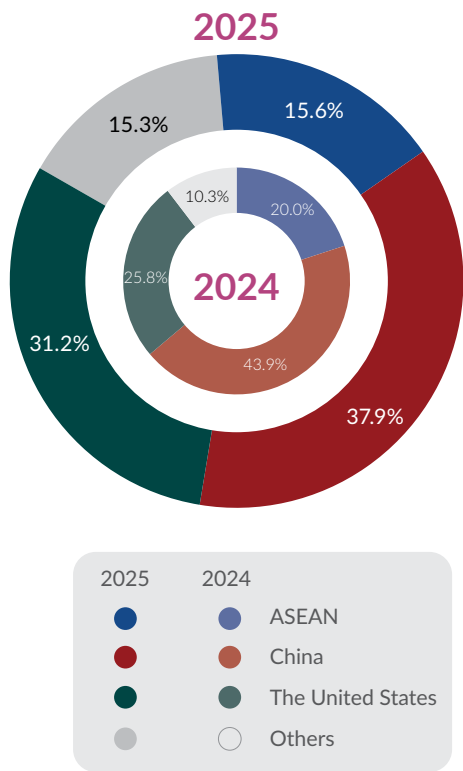
MOST INFLUENTIAL POLITICAL AND STRATEGIC POWER IN SOUTHEAST ASIA

China continues to be perceived as the most influential political and strategic power in Southeast Asia by 37.9% of ASEAN-10 respondents. However, this marks a decline from 43.9% in 2024. China remains the top choice among respondents across ASEAN, except for the Philippines, where the US continues to be seen as the most influential political and strategic power. Despite recognising its dominance, 68.8% of ASEAN respondents express concern over China's regional influence. This sentiment is particularly pronounced in Vietnam (91.2%) and the Philippines (83.0%), where territorial disputes in the South China Sea fuel anxieties.

The US has reinforced its position as a key political-strategic power, with 31.2% of ASEAN-10 respondents identifying it as the most influential – an increase from 25.8% in 2024. The US' influence is strongest in the Philippines (48.5%), where its security commitments and to defence cooperation remain critical to the country's strategic calculations. Singapore (37.2%) and Thailand (34.2%) also recognise the US as an important strategic power. However, views of the US' influence remain polarised. While 51.0% of ASEAN-10 respondents welcome Washington's influence in the region, 49.0% express concern, with apprehension strongest in Indonesia (75.4%), Thailand (65.7%) and Malaysia (63.8%). Nonetheless, the region has become less wary of US influence, with only 49.0% expressing concern this year compared to 59.0% in 2024.

ASEAN remains the third most influential power, with 15.6% of respondents believing that the regional organisation holds substantial sway over political and strategic developments. This perspective is particularly strong in Indonesia (32.9%) and Malaysia (25.0%), which assumed the ASEAN Chairmanship this year. ASEAN's role as a central pillar of regional diplomacy continues to be widely recognised. Encouragingly, ASEAN enjoys the most favourable perception among the top three powers, with 69.9% of respondents welcoming its influence, reflecting broad regional support for ASEAN's diplomatic and strategic efforts. However, 30.1% of respondents express concerns about ASEAN's growing role, particularly in Thailand (63.6%), Vietnam (50.0%), and Myanmar (37.5%), likely reflecting doubts about its ability to effectively address regional crises in Myanmar and the South China Sea.

Meanwhile, middle powers – including Australia, the European Union, India, Japan, South Korea, and the United Kingdom – have all seen slight improvements in their perceived influence, signalling their growing engagement in the region's geopolitical landscape.



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	
	2024	2025	2024	2025	2024	2025	2024	2025	2024	2025	2024	2025	2024	2025	2024	2025	2024	2025
ASEAN-10	20.0%	15.6%	0.5%	1.2%	43.9%	37.9%	3.4%	3.8%	0.4%	2.3%	3.7%	3.8%	1.4%	2.9%	25.8%	31.2%	0.9%	1.3%
BN	27.3%	18.1%	0.0%	1.3%	40.3%	31.5%	0.0%	9.4%	0.0%	6.0%	6.5%	4.7%	1.3%	5.4%	19.5%	22.8%	5.2%	0.7%
KH	13.8%	9.9%	0.5%	1.7%	53.4%	35.5%	7.4%	2.9%	0.5%	6.4%	3.2%	5.8%	0.5%	3.5%	20.1%	31.4%	0.5%	2.9%
ID	34.3%	32.9%	1.1%	0.4%	32.5%	36.9%	1.5%	1.2%	0.0%	0.0%	5.3%	2.8%	1.9%	0.0%	23.4%	25.8%	0.0%	0.0%
LA	10.6%	10.6%	0.6%	2.6%	64.4%	33.8%	5.6%	7.9%	0.6%	4.0%	1.3%	6.0%	1.9%	5.3%	15.0%	27.2%	0.0%	2.6%
MY	24.4%	25.0%	0.9%	0.4%	42.7%	41.3%	0.4%	0.8%	0.9%	0.0%	2.7%	3.8%	3.6%	1.7%	23.6%	24.2%	0.9%	2.9%
MM	10.1%	8.2%	0.5%	3.6%	43.4%	41.2%	5.8%	4.1%	0.5%	4.1%	4.2%	4.6%	2.6%	3.1%	32.8%	28.9%	0.0%	2.1%
PH	26.5%	16.0%	0.0%	0.5%	19.5%	25.7%	3.7%	2.4%	0.0%	0.0%	6.5%	2.9%	0.0%	2.9%	42.8%	48.5%	0.9%	1.0%
SG	17.9%	13.2%	0.4%	0.8%	38.8%	40.9%	1.1%	2.1%	1.5%	0.8%	2.2%	3.3%	0.7%	1.2%	37.0%	37.2%	0.4%	0.4%
TH	8.0%	5.6%	0.5%	0.0%	58.2%	48.5%	5.0%	4.1%	0.0%	0.0%	3.0%	2.6%	1.0%	4.6%	22.9%	34.2%	1.5%	0.5%
VN	27.0%	16.8%	0.0%	0.6%	46.0%	43.9%	3.5%	3.2%	0.0%	1.3%	2.0%	1.3%	0.5%	1.3%	21.0%	31.6%	0.0%	0.0%
TL	N.A.	21.2%	N.A.	6.1%	N.A.	39.4%	N.A.	1.5%	N.A.	0.0%	N.A.	1.5%	N.A.	0.0%	N.A.	30.3%	N.A.	0.0%

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

321 respondents excluding Timor-Leste who chose the "ASEAN" option in Q24; 746 respondents excluding Timor-Leste who chose the "China" option in Q24; 614 respondents excluding Timor-Leste who chose 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	
	2024	2025	2024	2025	2024	2025	2024	2025	2024	2025	2024	2025
ASEAN-10	41.6%	30.1%	58.4%	69.9%	73.5%	68.8%	26.5%	31.2%	59.0%	49.0%	41.0%	51.0%
BN	23.8%	3.7%	76.2%	96.3%	58.1%	51.1%	41.9%	48.9%	73.3%	47.1%	26.7%	52.9%
KH	61.5%	35.3%	38.5%	64.7%	66.3%	60.7%	33.7%	39.3%	57.9%	48.1%	42.1%	51.9%
ID	25.3%	26.5%	74.7%	73.5%	57.0%	63.4%	43.0%	36.6%	72.6%	75.4%	27.4%	24.6%
LA	82.4%	6.3%	17.6%	93.8%	68.0%	47.1%	32.0%	52.9%	79.2%	51.2%	20.8%	48.8%
MY	27.3%	23.3%	72.7%	76.7%	56.3%	64.6%	43.8%	35.4%	67.9%	63.8%	32.1%	36.2%
MM	42.1%	37.5%	57.9%	62.5%	95.1%	73.8%	4.9%	26.3%	45.2%	32.1%	54.8%	67.9%
PH	35.1%	33.3%	64.9%	66.7%	81.0%	83.0%	19.0%	17.0%	31.5%	34.0%	68.5%	66.0%
SG	30.6%	21.9%	69.4%	78.1%	73.6%	69.7%	26.4%	30.3%	36.6%	37.8%	63.4%	62.2%
TH	56.3%	63.6%	43.8%	36.4%	83.8%	83.2%	16.2%	16.8%	80.4%	65.7%	19.6%	34.3%
VN	31.5%	50.0%	68.5%	50.0%	95.7%	91.2%	4.3%	8.8%	45.2%	34.7%	54.8%	65.3%
TL	N.A.	14.3%	N.A.	85.7%	N.A.	69.2%	N.A.	30.8%	N.A.	30.0%	N.A.	70.0%

Timor-Leste: 14 respondents who chose the "ASEAN" option in Q24; 26 respondents who chose the "China" option in Q24; 20 respondents who chose the "US" option in Q24

DIALOGUE PARTNERS' STRATEGIC RELEVANCE TO ASEAN

China narrowly retained its position as ASEAN-10's most strategically relevant dialogue partner, with an average ranking score of 8.80 out of 11. It is the top choice in 6 countries: Brunei, Indonesia, Laos, Malaysia, Singapore, and Thailand. China's ranking highlights its deep economic ties with the region, particularly through trade and infrastructure investments under the Belt and Road Initiative (BRI). As Beijing continues to expand its economic footprint, its strategic influence remains firmly embedded in the ASEAN region.

The US closely follows China in ASEAN's strategic calculations, securing an average score of 8.76. It ranks as the most strategically relevant partner in Cambodia, Myanmar, the Philippines, and Vietnam. Cambodia's ranking of the US as its most relevant partner signals a shift in Phnom Penh's foreign policy, reflecting a subtle rebalancing of its historically close ties with China.

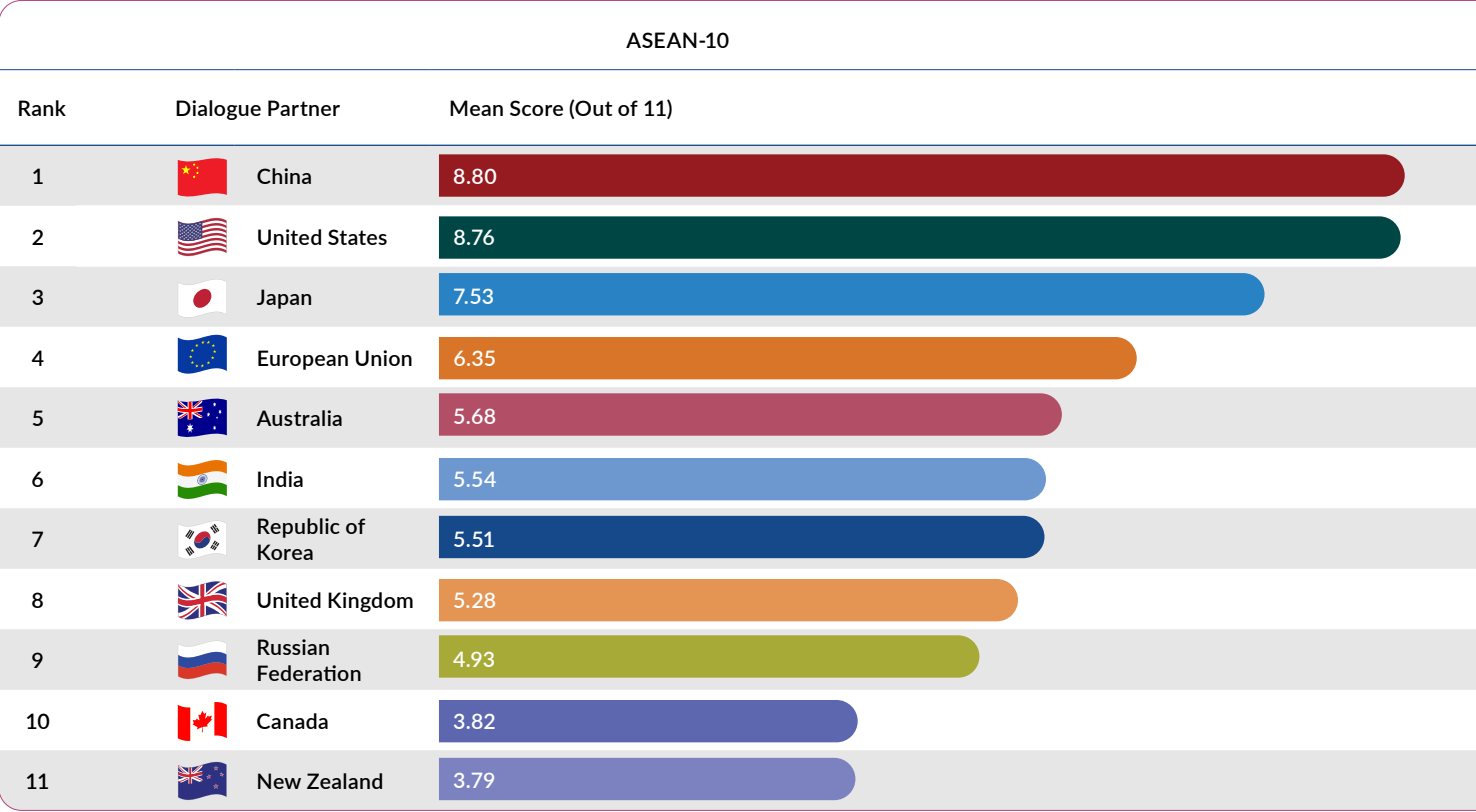
Japan remains a key strategic partner for ASEAN, ranking third overall with an average score of 7.53. It consistently appears among the top three partners in almost all ASEAN countries, reflecting its long-standing contributions to

foreign aid, infrastructure and economic development. Japan's ranking is particularly strong in Brunei and the Philippines, where it is possibly regarded as an important economic and growing maritime security partner.

The EU remains an important partner for ASEAN, maintaining its position at the fourth place, likely viewed as a stable economic player in the region. While it does not rank as highly as China or the US in strategic relevance, the EU's relevance is driven by its strong trade relations, investment flows, regulatory cooperation and commitment to multilateralism. The EU's ranking is particularly strong in Vietnam, where a free trade agreement has strengthened economic ties.

India has made notable strides in ASEAN's rankings, climbing from ninth to sixth place this year. This rise could reflect India's increasing engagement with the region, and its active role in the Quad framework. India is particularly well-regarded in Brunei, Laos, and Myanmar, with Laos showing the most significant shift – elevating India's ranking from ninth to fourth place within a year.

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



Australia has also improved its standing, moving up two places from seventh to fifth place. This shift is likely driven by Canberra's deepening engagement with ASEAN, particularly through the celebration of the 50th anniversary of ASEAN-Australia dialogue partnership last year in Melbourne. Australia is notably viewed as a strategic partner by Malaysia and Singapore, where its security and defence collaborations remain key components of bilateral ties.

Conversely, South Korea and the United Kingdom have both slipped by two places in the rankings. Despite South Korea's strong economic ties with ASEAN, its strategic positioning appears to be overshadowed by other middle powers such as Japan and India. The UK's decline suggests that post-Brexit engagement efforts have faded somewhat in the past year, while other powers have increased their public prominence.

Russia has also fallen by one rank, likely due to its role in the ongoing conflict with Ukraine. While traditionally favoured by Indonesia, Laos, and Vietnam for defence cooperation, Russia's declining ranking indicates that its influence is waning in the region.

Canada and New Zealand remain less strategically relevant compared to other dialogue partners. Despite their consistent and long-standing engagements with ASEAN, their relevance continues to lag behind countries like Australia, India, and South Korea, suggesting that their strategic footprint in Southeast Asia remains small.

While Timor-Leste's ranking is not taken into account in the aggregate ASEAN-10 ranking this year, its ranking exactly mirrors Singapore's, indicating a similar perception of dialogue partners' strategic role despite differences in economic size and geopolitical positioning.

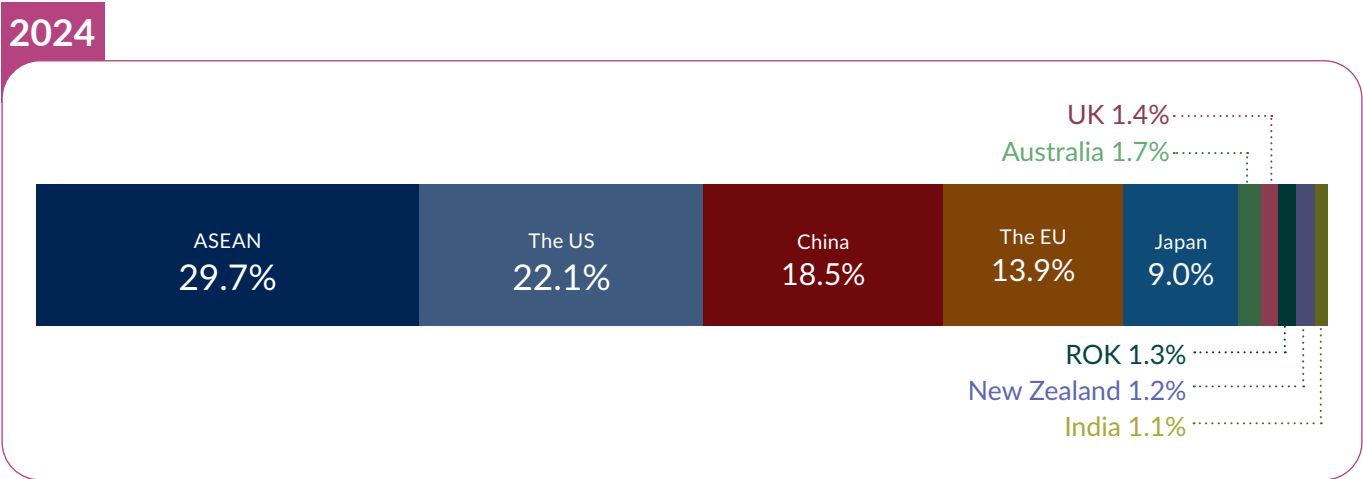
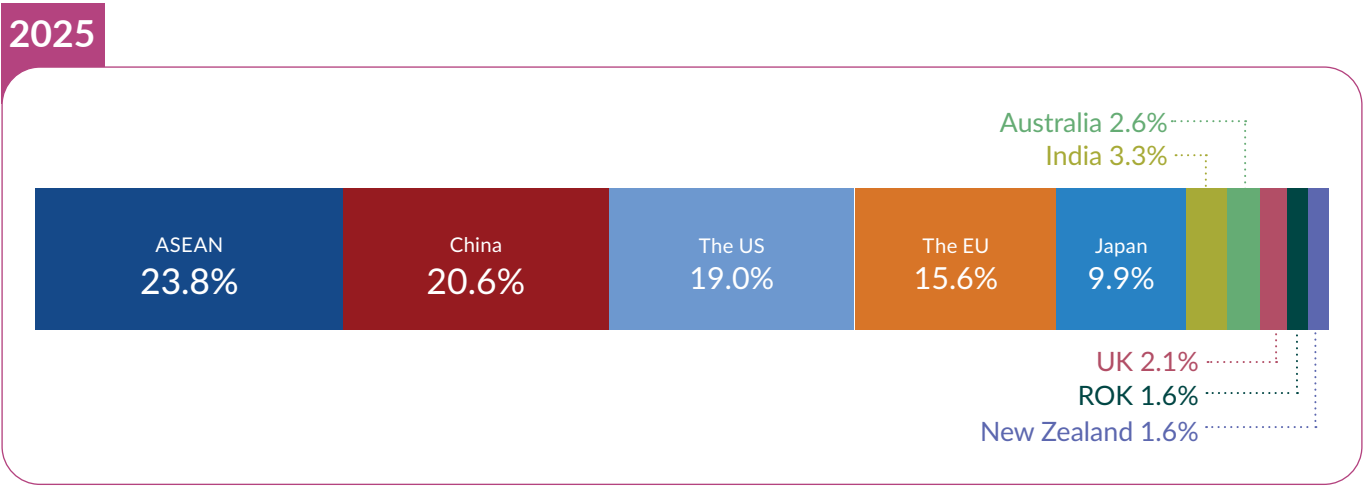
Ranking Order by ASEAN Member States											
	BN	KH	ID	LA	MY	MM	PH	SG	TH	VN	TL
China	1	2	1	1	1	2	3	1	1	2	1
United States	3	1	2	2	2	1	1	2	2	1	2
Japan	2	3	3	3	3	3	2	3	3	4	3
European Union	5	4	4	5	5	4	4	5	4	3	5
Australia	6	6	5	6	4	6	5	4	9	7	4
India	4	5	9	4	9	5	9	6	8	8	6
Republic of Korea	7	8	6	7	6	8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

LEADERSHIP IN CHAMPIONING GLOBAL FREE TRADE

ASEAN is still viewed with the most confidence to champion the global free trade agenda with 23.8% of ASEAN-10 respondents sharing this view. This sentiment has been rising over the past few years as the global trade landscape continues to undergo rapid changes and volatility amid the ongoing US-China trade tensions. The strongest proponents for ASEAN are Indonesia (42.9%), Malaysia (33.8%), and Singapore (31.8%). Malaysia, ASEAN's Chair for 2025, continues to prioritise efforts to boost intra-regional trade and investment activities amongst the ASEAN member states (AMS). One of its key deliverables this year centres on the completion of the ASEAN Trade in Goods Agreement (ATIGA) upgrade negotiations which will help to better achieve this objective.

China follows closely behind at 20.6% and is the top choice for Brunei (32.2%), Laos (29.8%), and Thailand (25.0%). The US is third at 19.0% and is the top choice for Vietnam (36.8%), the Philippines (29.6%), and Cambodia (19.8%). Compared to last year, China and the US have traded positions with more respondents citing the US in 2024 at 22.1% relative to China at 18.5%. The more positive sentiment towards China is shared by most AMS except for Cambodia.

In line with ASEAN-10's views, a large proportion of Timor-Leste respondents (43.9%) share the same confidence about ASEAN's role in championing free trade.



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

2025										
Country	ASEAN	Australia	China	The European Union	India	Japan	New Zealand	Republic of Korea	The United Kingdom	The United States
ASEAN-10	23.8%	2.6%	20.6%	15.6%	3.3%	9.9%	1.6%	1.6%	2.1%	19.0%
BN	16.1%	4.0%	32.2%	13.4%	4.7%	9.4%	2.0%	4.0%	4.0%	10.1%
KH	13.4%	2.9%	18.0%	17.4%	3.5%	14.5%	2.3%	2.3%	5.8%	19.8%
ID	42.9%	2.8%	23.0%	10.7%	0.4%	9.9%	0.8%	0.8%	1.6%	7.1%
LA	12.6%	4.0%	29.8%	8.6%	13.9%	8.6%	0.7%	0.7%	1.3%	19.9%
MY	33.8%	1.3%	29.2%	11.7%	0.8%	7.9%	2.1%	1.7%	1.7%	10.0%
MM	10.3%	3.1%	15.5%	29.4%	4.6%	5.7%	3.1%	3.1%	1.0%	24.2%
PH	28.6%	1.5%	9.2%	13.1%	0.5%	13.6%	1.0%	1.0%	1.9%	29.6%
SG	31.8%	2.5%	17.8%	14.9%	2.1%	12.0%	2.9%	0.8%	2.1%	13.2%
TH	21.9%	1.5%	25.0%	17.9%	0.5%	10.7%	1.0%	0.5%	2.0%	18.9%
VN	26.5%	2.6%	6.5%	18.7%	1.9%	6.5%	0.0%	0.6%	0.0%	36.8%
TL	43.9%	1.5%	27.3%	9.1%	0.0%	3.0%	1.5%	1.5%	1.5%	10.6%

2024										
Country	ASEAN	Australia	China	The European Union	India	Japan	New Zealand	Republic of Korea	The United Kingdom	The United States
ASEAN-10	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%

LEADERSHIP IN MAINTAINING RULES-BASED ORDER AND UPHOLDING INTERNATIONAL LAW

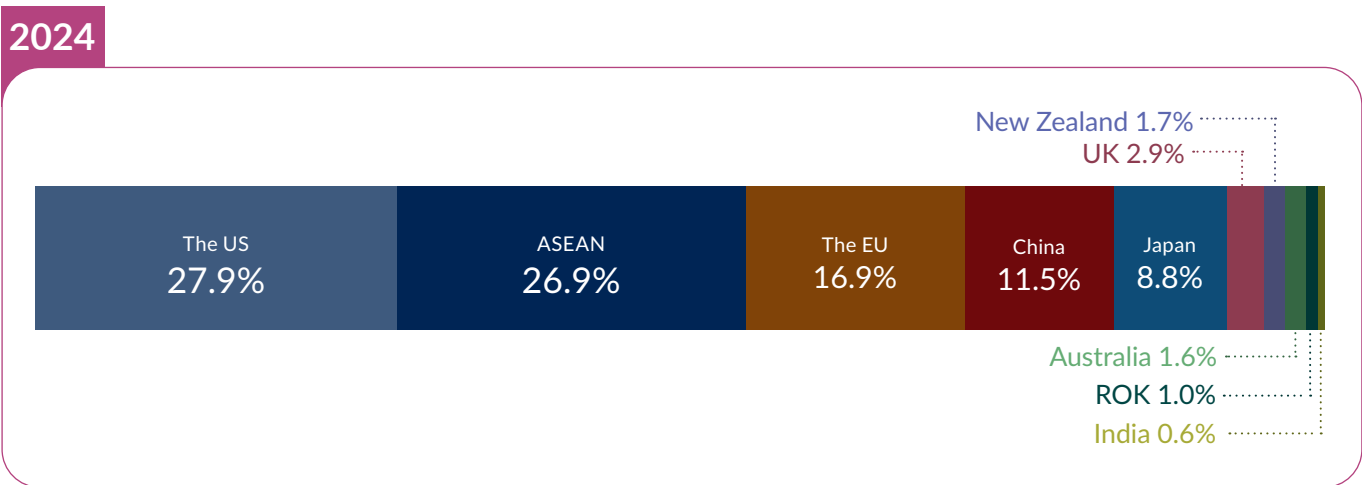
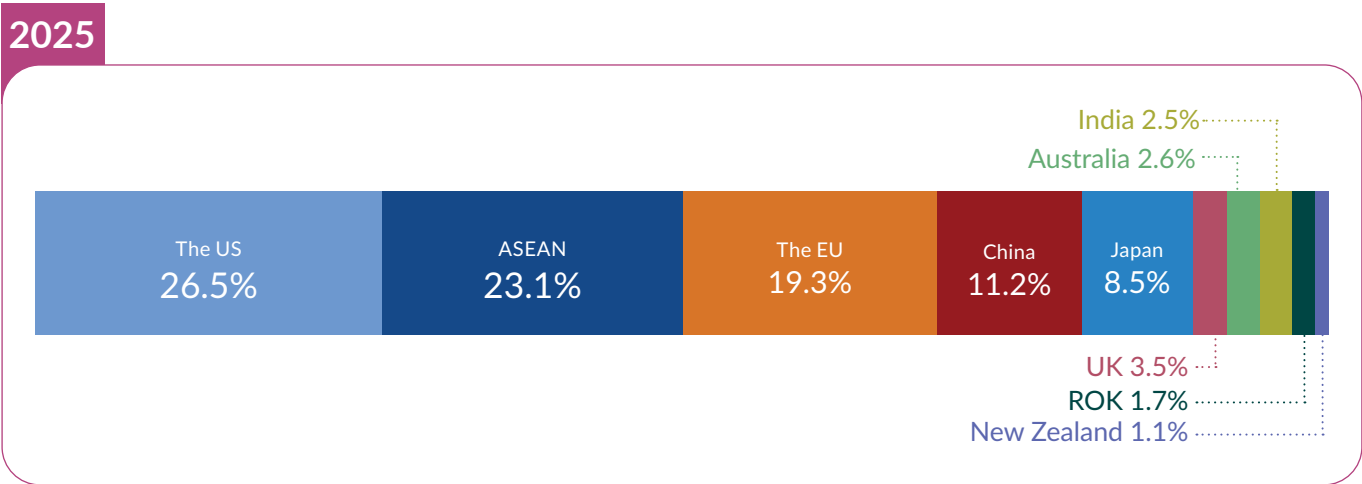
The US continues to be perceived as the leading actor in maintaining the rules-based order and upholding international law, with 26.5% of ASEAN-10 respondents selecting it. This sentiment is particularly strong in Vietnam (41.9%), the Philippines (38.3%), Cambodia (36.0%), and Myanmar (32.0%). Despite concerns over President Trump’s transactional approach and the US’ withdrawal from international organisations, ASEAN-10 respondents continue to see the US as a key defender of global governance.

ASEAN ranks second with 23.1% of ASEAN-10 respondents reflecting confidence in the region’s own ability to uphold multilateralism and shape regional norms. Support for ASEAN’s leadership role is particularly pronounced in Indonesia (46.8%) and Malaysia (34.6%), where ASEAN centrality and principles remain a cornerstone of regional diplomacy.

The EU follows closely behind with 19.3%, reinforcing its reputation as a strong proponent of the rules-based order, international law, and multilateralism. The EU is most highly regarded in Myanmar (27.8%), Thailand and Singapore (both at 24.0%).

China is less preferable as a leader in maintaining the rules-based order with merely 11.2% of ASEAN-10 respondents choosing it, with the strongest recognition in Laos (23.2%). The combined influence of middle powers like Japan, the United Kingdom, Australia, India, South Korea, and New Zealand surpasses 2024 figures, reflecting growing recognition of their principled approach and sustained engagement with ASEAN.

The largest proportion of Timor-Leste respondents (39.4%) regard ASEAN as their top choice to provide leadership to maintain the rules-based order and uphold international law.



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

2025										
Country	ASEAN	Australia	China	The European Union	India	Japan	New Zealand	Republic of Korea	The United Kingdom	The United States
ASEAN-10	23.1%	2.6%	11.2%	19.3%	2.5%	8.5%	1.1%	1.7%	3.5%	26.5%
BN	20.8%	6.0%	16.8%	13.4%	3.4%	11.4%	0.7%	4.0%	4.7%	18.8%
KH	8.7%	2.9%	8.7%	20.3%	4.7%	6.4%	1.2%	5.8%	5.2%	36.0%
ID	46.8%	2.0%	6.7%	18.3%	0.4%	9.1%	2.0%	0.4%	2.0%	12.3%
LA	19.9%	1.3%	23.2%	15.9%	6.0%	4.6%	0.7%	0.7%	6.0%	21.9%
MY	34.6%	2.9%	12.5%	15.4%	0.8%	9.6%	1.7%	1.7%	2.5%	18.3%
MM	9.8%	4.1%	8.2%	27.8%	3.6%	5.2%	1.5%	1.0%	6.7%	32.0%
PH	24.3%	1.5%	2.9%	18.0%	0.5%	10.7%	1.5%	0.0%	2.4%	38.3%
SG	23.6%	2.1%	12.0%	24.0%	1.7%	12.0%	1.2%	1.2%	2.1%	20.2%
TH	16.3%	2.0%	17.3%	24.0%	1.5%	9.2%	1.0%	1.0%	2.6%	25.0%
VN	26.5%	0.6%	3.9%	16.1%	2.6%	6.5%	0.0%	1.3%	0.6%	41.9%
TL	39.4%	4.5%	1.5%	19.7%	0.0%	0.0%	4.5%	1.5%	1.5%	27.3%

2024										
Country	ASEAN	Australia	China	The European Union	India	Japan	New Zealand	Republic of Korea	The United Kingdom	The United States
ASEAN-10	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%

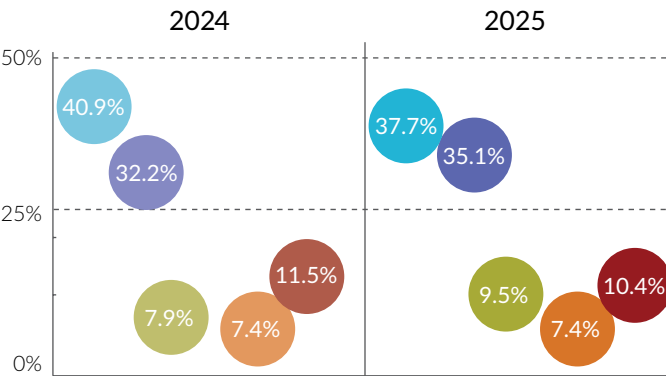
COOPERATION WITH THE QUADRILATERAL SECURITY DIALOGUE

Similar to 2024, the largest group of ASEAN-10 respondents view cooperation between ASEAN and the QUAD as beneficial to the region at 37.7%, which is particularly strong in Vietnam (48.4%), the Philippines (43.7%), and Thailand (43.4%).

Meanwhile, 35.1% of ASEAN-10 respondents believe that ASEAN-QUAD cooperation will complement ASEAN's existing efforts rather than undermine them. This sentiment is strongest in Singapore (43.0%), Indonesia (40.9%), Vietnam (40.6%), and Malaysia (39.6%), indicating confidence that ASEAN can collaborate with the QUAD while maintaining its own leadership role.

Against these positive perceptions, 10.4% of ASEAN-10 respondents fear that ASEAN-QUAD cooperation will threaten ASEAN centrality and compete with ASEAN-led mechanisms. This concern is most evident in Thailand (16.3%) and Cambodia (14.0%), reflecting apprehensions that ASEAN's leadership in regional affairs could be overshadowed.

Another 9.5% of ASEAN-10 respondents fear that ASEAN-QUAD cooperation will force countries to choose sides in geopolitical rivalries. This concern is highest in Brunei (15.4%), Myanmar (13.4%), and Laos (13.2%). A smaller proportion of ASEAN-10 respondents (7.4%) believe that cooperation with the QUAD will provoke China. This relatively low level of concern across most ASEAN countries suggests that many do not see ASEAN-QUAD engagement as antagonistic towards Beijing, though sensitivities remain in specific countries.



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	
	2024	2025	2024	2025	2024	2025	2024	2025	2024	2025
ASEAN-10	40.9%	37.7%	32.2%	35.1%	7.9%	9.5%	7.4%	7.4%	11.5%	10.4%
BN	27.3%	32.2%	35.1%	28.9%	9.1%	15.4%	10.4%	11.4%	18.2%	12.1%
KH	53.4%	39.0%	25.4%	27.9%	3.2%	10.5%	4.2%	8.7%	13.8%	14.0%
ID	38.1%	35.3%	40.4%	40.9%	7.5%	3.6%	4.2%	8.3%	9.8%	11.9%
LA	52.5%	39.7%	19.4%	30.5%	4.4%	13.2%	10.0%	5.3%	13.8%	11.3%
MY	35.1%	30.8%	34.7%	39.6%	9.3%	8.8%	6.7%	8.8%	14.2%	12.1%
MM	36.5%	34.0%	27.5%	33.0%	13.2%	13.4%	13.8%	10.3%	9.0%	9.3%
PH	42.3%	43.7%	42.3%	39.8%	4.7%	6.3%	4.2%	5.3%	6.5%	4.9%
SG	32.2%	30.2%	34.4%	43.0%	10.6%	9.5%	12.1%	8.7%	10.6%	8.7%
TH	39.3%	43.4%	27.4%	27.0%	12.4%	10.2%	6.5%	3.1%	14.4%	16.3%
VN	52.5%	48.4%	35.5%	40.6%	5.0%	3.9%	2.0%	3.9%	5.0%	3.2%
TL	N.A.	54.5%	N.A.	30.3%	N.A.	1.5%	N.A.	1.5%	N.A.	12.1%

VIEWS ON THE EMERGENCE OF NEW INFORMAL GROUPINGS

The emergence of plurilateral and new minilateral groupings outside of the United Nations framework has had some effect on the conduct of multilateral cooperation. Within the region, some ASEAN member states have either joined or expressed interest in joining new groupings like BRICS.

For this question, two responses that prioritise ASEAN and are wary of these other groupings are favoured by half of the ASEAN-10 respondents. The first group supports ASEAN in strengthening its convening power and normative influence to ensure its members remain committed and discourage them from joining other groupings (26.2%). This is the top choice for Indonesia (40.9%), the Philippines (34.5%), Brunei (28.9%), and Malaysia (26.3%). The second group (23.8%) says that ASEAN member states should be mindful of joining groupings that risk undermining ASEAN centrality. This is the top choice for Thailand (29.1%) and Singapore (28.5%). A significant third group (23.5%) with a more nuanced position say that ASEAN should join together as a collective grouping to pursue regional interests. This is the top choice for the newer ASEAN member states.

About a fifth of ASEAN-10 respondents (20.2%) support prioritising national interests over regional interests. This is the second-ranked option for Malaysia (25.4%) and Myanmar (25.3%).

The last option, not joining any grouping and focusing simply on ASEAN multilateralism, is supported by merely 6.2% of ASEAN-10 respondents. This shows the level of countries' pragmatism in keeping all options open even as they claim support for ASEAN centrality.

For Timor-Leste, being mindful of not undermining ASEAN centrality is its top choice (34.8%) followed by joining as a collective (22.7%) and keeping its option free to join groupings, as long as it meets national priorities (22.7%).



Q30 New informal groupings outside of the international UN framework have emerged as avenues to pursue plurilateral functional cooperation. Groupings like the AUKUS, Quad, BRICS, I2U2, GCAP, and Minerals Security Partnership are designed for issue-specific cooperation. Do you agree that...

Country	ASEAN member states should be mindful of joining groupings that risk undermining ASEAN centrality	ASEAN should join as a collective grouping to pursue regional interests	ASEAN should not join any grouping and focus on working within ASEAN to pursue multilateral cooperation	ASEAN should strengthen its convening power and normative influence to ensure its members remain committed and discourage them from joining other groupings	Individual ASEAN member states are free to join any grouping that meets their national interests
ASEAN-10	23.8%	23.5%	6.2%	26.2%	20.2%
BN	27.5%	21.5%	7.4%	28.9%	14.8%
KH	23.8%	28.5%	8.7%	22.1%	16.9%
ID	24.2%	12.7%	4.0%	40.9%	18.3%
LA	23.2%	29.1%	13.2%	16.6%	17.9%
MY	25.0%	20.4%	2.9%	26.3%	25.4%
MM	20.6%	26.3%	6.2%	21.6%	25.3%
PH	26.2%	23.3%	4.4%	34.5%	11.7%
SG	28.5%	26.4%	4.1%	16.1%	24.8%
TH	29.1%	15.3%	6.6%	26.5%	22.4%
VN	10.3%	31.6%	4.5%	29.0%	24.5%
TL	34.8%	22.7%	1.5%	18.2%	22.7%

SECTION IV

US-China Rivalry and its Impact on Southeast Asia

44-56

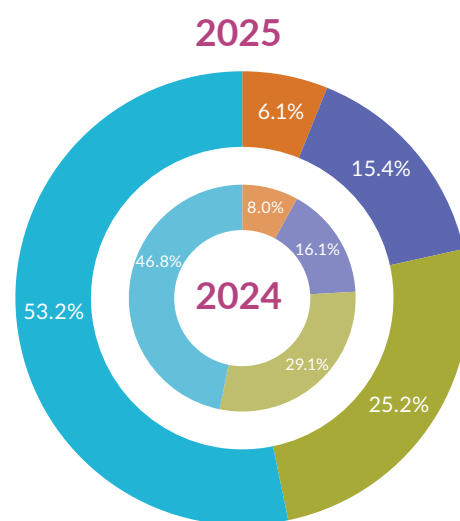
This section examines ASEAN's sentiments and options in the unfolding power competition in the region, especially the deepening rivalry between China and the United States.

ASSESSING ASEAN'S OPTIONS

As competition between China and the US intensifies in Southeast Asia, a majority of ASEAN-10 respondents (53.2%) believe that ASEAN should enhance its resilience and unity to fend off pressure from the two major powers. This option has been gaining traction over the years. Support for this approach is particularly strong in Thailand (63.8%), the Philippines (63.6%), Indonesia (60.3%), and Vietnam (56.1%), underscoring a regional preference for strengthening internal cohesion in maintaining ASEAN's strategic autonomy.

A quarter of ASEAN-10 respondents (25.2%) believe ASEAN should continue its position of not siding with either China or the US, reaffirming the grouping's commitment to neutrality. This sentiment is most pronounced in Malaysia (32.9%), Singapore (31.4%), Myanmar (29.9%), and Indonesia (29.4%).

At the same time, 15.4% of ASEAN-10 respondents support ASEAN in seeking out "third parties" to broaden its strategic space and options.



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	
	2024	2025	2024	2025	2024	2025	2024	2025
ASEAN-10	8.0%	6.1%	16.1%	15.4%	29.1%	25.2%	46.8%	53.2%
BN	7.8%	8.1%	14.3%	11.4%	36.4%	27.5%	41.6%	53.0%
KH	3.8%	9.3%	31.2%	19.8%	21.7%	23.8%	33.3%	47.1%
ID	3.8%	1.6%	9.4%	8.7%	34.3%	29.4%	52.5%	60.3%
LA	12.5%	9.9%	18.1%	19.2%	18.1%	26.5%	51.3%	44.4%
MY	4.4%	4.2%	11.6%	8.3%	41.8%	32.9%	42.2%	54.6%
MM	13.8%	8.2%	18.5%	19.1%	40.7%	29.9%	27.0%	42.8%
PH	12.6%	8.3%	10.7%	10.7%	22.3%	17.5%	54.4%	63.6%
SG	2.6%	2.5%	16.1%	19.4%	35.9%	31.4%	45.4%	46.7%
TH	3.5%	3.6%	13.9%	19.4%	20.9%	13.3%	61.7%	63.8%
VN	5.5%	5.8%	17.0%	18.1%	19.0%	20.0%	58.5%	56.1%
TL	N.A.	7.6%	N.A.	6.1%	N.A.	31.8%	N.A.	54.5%

ASEAN'S FUTURE: CHINA OR THE UNITED STATES?

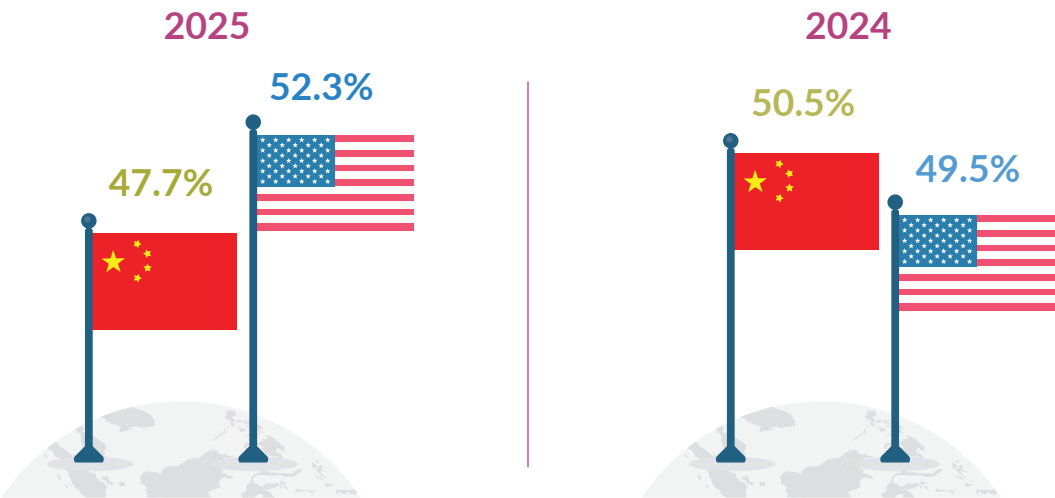
ASEAN-10 respondents have shifted again on the question of strategic alignment, with 52.3% favouring the US over China (47.7%) if the region were forced to choose. This narrow margin underscores ASEAN's delicate balancing act between the two major powers, as economic interdependence with China competes with security considerations and more comfortable historical ties to the US.

Support for aligning with China is strongest in Indonesia (72.2%), Malaysia (70.8%), Thailand (55.6%), Brunei (55.0%), and Laos (51.0%). These results suggest that deep economic ties, trade dependencies and regional connectivity projects, such as China's BRI, as well as

growing discontent with US policies (particularly its stance on the Israel-Gaza conflict) could significantly shape preferences for Beijing.

Conversely, support for aligning with the US is highest in the Philippines (86.4%), Vietnam (73.5%), Myanmar (57.7%), Cambodia (57.0%), and Singapore (52.9%). The Philippines and Vietnam's overwhelming preference for the US is likely driven by ongoing territorial disputes with China in the South China Sea, as well as their growing security partnerships with Washington.

In line with the ASEAN-10 view, Timor-Leste respondents have expressed a preference for the US with a majority of 59.1% choosing it.



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

Country	China		The United States	
	2024	2025	2024	2025
ASEAN-10	50.5%	47.7%	49.5%	52.3%
BN	70.1%	55.0%	29.9%	45.0%
KH	45.0%	43.0%	55.0%	57.0%
ID	73.2%	72.2%	26.8%	27.8%
LA	70.6%	51.0%	29.4%	49.0%
MY	75.1%	70.8%	24.9%	29.2%
MM	42.3%	42.3%	57.7%	57.7%
PH	16.7%	13.6%	83.3%	86.4%
SG	38.5%	47.1%	61.5%	52.9%
TH	52.2%	55.6%	47.8%	44.4%
VN	21.0%	26.5%	79.0%	73.5%
TL	N.A.	40.9%	N.A.	59.1%

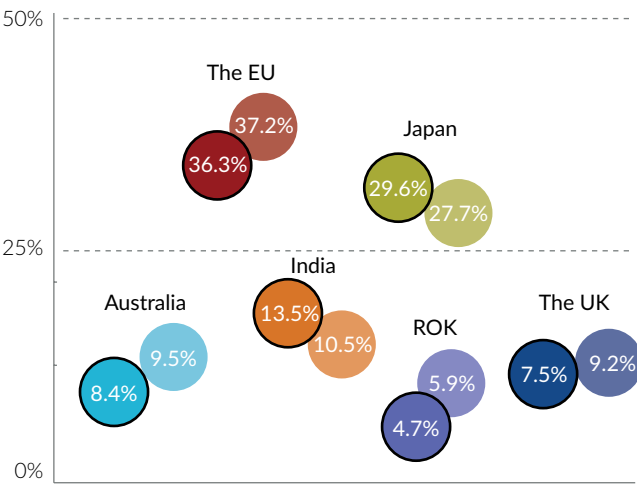
BROADENING ASEAN'S STRATEGIC OPTIONS

Similar to findings from previous years, the EU remains the most preferred and trusted strategic partner as ASEAN navigates the complexities of the US-China strategic rivalry, with 36.3% of ASEAN-10 respondents selecting it. Support for the EU is particularly strong in Vietnam (55.5%), Indonesia (42.5%), Thailand (39.8%), and Myanmar (39.2%). The EU's emphasis on multilateralism and rules-based governance reinforces its appeal as a reliable and balanced partner for ASEAN.

Japan is the second-most preferred partner, with 29.6% of ASEAN-10 respondents favouring it. Japan receives the highest support in the Philippines (42.7%), Malaysia (35.4%), and Singapore (35.1%). India is seen as a growing strategic partner, with 13.5% of ASEAN-10 respondents selecting it – an increase from 10.5% last year. Support for India is most pronounced in Laos (25.2%), Myanmar (18.0%), and Brunei (16.8%).

Australia (8.4%), the United Kingdom (7.5%), and South Korea (4.7%) – each experiencing a slight decline compared to last year – receive more limited recognition as ASEAN's hedging partners.

Timor-Leste respondents recognise the EU as their top hedging partner (36.4%), followed closely by Australia (30.3%). Australia ranks highest in Timor-Leste, reflecting close historical ties and Canberra's active role in supporting Timor-Leste's development and regional integration.



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	
	2024	2025	2024	2025	2024	2025	2024	2025	2024	2025	2024	2025
ASEAN-10	9.5%	8.4%	37.2%	36.3%	10.5%	13.5%	27.7%	29.6%	5.9%	4.7%	9.2%	7.5%
BN	19.5%	13.4%	20.8%	24.8%	7.8%	16.8%	31.2%	24.8%	6.5%	7.4%	14.3%	12.8%
KH	9.5%	8.7%	45.0%	35.5%	7.4%	11.6%	23.3%	30.2%	3.7%	5.8%	11.1%	8.1%
ID	8.3%	7.9%	34.3%	42.5%	10.2%	11.5%	34.3%	29.8%	9.4%	5.6%	3.4%	2.8%
LA	7.5%	6.6%	35.6%	29.8%	13.1%	25.2%	16.3%	20.5%	10.6%	7.9%	16.9%	9.9%
MY	7.1%	6.7%	29.8%	31.7%	15.6%	10.0%	28.9%	35.4%	8.4%	6.7%	10.2%	9.6%
MM	8.5%	11.3%	34.9%	39.2%	12.7%	18.0%	24.9%	22.2%	10.6%	3.6%	8.5%	5.7%
PH	7.0%	6.8%	39.1%	34.0%	2.8%	4.4%	35.8%	42.7%	4.2%	1.9%	11.2%	10.2%
SG	16.8%	9.1%	28.2%	30.2%	9.5%	14.0%	35.5%	35.1%	3.3%	4.1%	6.6%	7.4%
TH	5.0%	8.2%	43.3%	39.8%	15.9%	11.7%	26.4%	29.6%	2.0%	3.1%	7.5%	7.7%
VN	5.5%	5.2%	61.5%	55.5%	9.5%	11.6%	20.5%	25.2%	0.5%	1.3%	2.5%	1.3%
TL	N.A.	30.3%	N.A.	36.4%	N.A.	9.1%	N.A.	18.2%	N.A.	1.5%	N.A.	4.5%

THE FUTURE OF CHINA’S RELATIONS WITH REGIONAL COUNTRIES

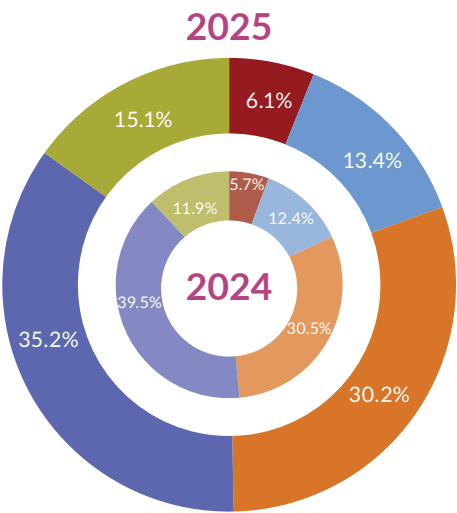
Similar to findings from 2024, ASEAN-10 respondents remain largely optimistic about the trajectory of their country’s relations with China over the next three years, with 50.3% of ASEAN-10 respondents believing ties will improve – comprising 15.1% foreseeing significant improvement and 35.2% expecting moderate improvement. This positive outlook is particularly strong in Laos (68.9%), Indonesia (67.8%), and Malaysia (63.8%), reflecting deepening economic cooperation and China’s continued investment in infrastructure projects in these countries.

Meanwhile, 30.2% of ASEAN-10 respondents believe their country’s relations with China will remain the same, signalling expectations of continuity in diplomatic and economic engagements. This view is most prevalent in Singapore (47.1%) and Vietnam (41.9%), suggesting that while these countries recognise China’s strategic importance, they do not anticipate major shifts in their current bilateral ties.

On the other hand, 19.5% of ASEAN-10 respondents expect relations with China to deteriorate, with 13.4% predicting moderate deterioration and 6.1% foreseeing significant worsening.

This concern is most pronounced in the Philippines (66.0%), Myanmar (35.5%) and Vietnam (21.3%), where geopolitical tensions and unresolved territorial disputes in the South China Sea continue to strain relations.

A large majority of Timor-Leste respondents (69.7%) express strong optimism for improved relations with China, highlighting China’s role as a key development partner.



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	
	2024	2025	2024	2025	2024	2025	2024	2025	2024	2025
ASEAN-10	5.7%	6.1%	12.4%	13.4%	30.5%	30.2%	39.5%	35.2%	11.9%	15.1%
BN	5.2%	1.3%	10.4%	8.1%	31.2%	31.5%	40.3%	38.3%	13.0%	20.8%
KH	11.1%	4.7%	10.1%	11.0%	13.8%	25.0%	40.2%	38.4%	24.9%	20.9%
ID	0.4%	1.6%	4.9%	3.2%	26.4%	27.4%	58.5%	47.2%	9.8%	20.6%
LA	3.1%	1.3%	9.4%	9.9%	19.4%	19.9%	56.9%	41.1%	11.3%	27.8%
MY	1.8%	0.8%	5.8%	6.7%	27.1%	28.8%	50.2%	44.2%	15.1%	19.6%
MM	10.1%	14.9%	19.0%	20.6%	46.0%	29.9%	19.0%	23.7%	5.8%	10.8%
PH	17.7%	26.2%	43.3%	39.8%	24.7%	21.4%	12.1%	10.2%	2.3%	2.4%
SG	0.7%	1.2%	7.3%	5.8%	46.5%	47.1%	36.6%	38.4%	8.8%	7.4%
TH	0.5%	1.5%	6.0%	14.3%	34.3%	29.6%	43.8%	40.8%	15.4%	13.8%
VN	6.0%	7.1%	8.0%	14.2%	35.5%	41.9%	37.5%	29.7%	13.0%	7.1%
TL	N.A.	6.1%	N.A.	0.0%	N.A.	24.2%	N.A.	48.5%	N.A.	21.2%

Q34A What could potentially worsen your positive impression of China?

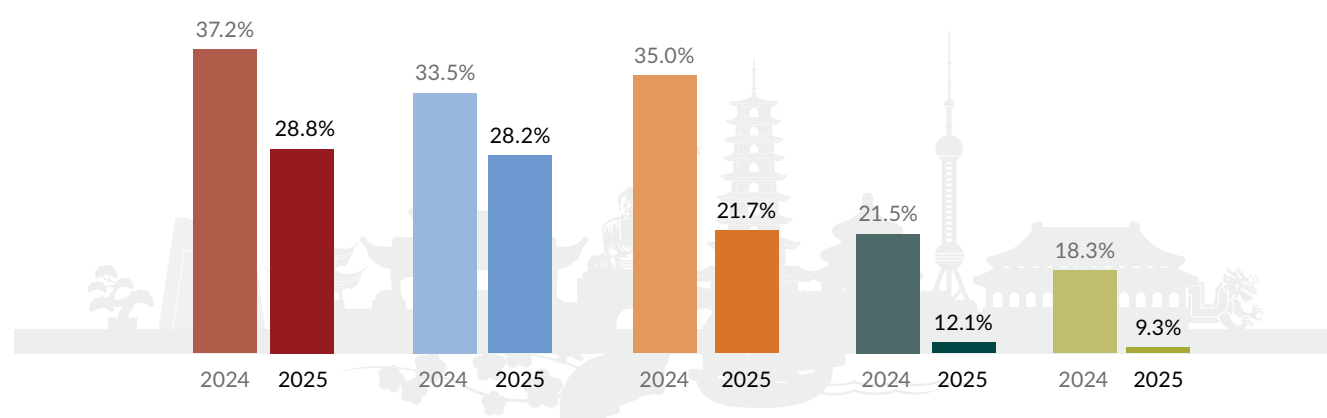
(Check 1 response)

China's strong-arm tactics in the South China Sea and the Mekong (28.8%) rank as the top issue for ASEAN-10 respondents, particularly in Vietnam (54.4%), the Philippines (46.2%), and Brunei (29.5%) – all claimant states in the South China Sea. China's interference in domestic affairs (28.2%) is the second-most cited concern, particularly in Singapore (42.3%), Indonesia (36.3%), and Cambodia (31.4%).

China's use of economic tools and tourism to punish foreign policy choices (21.7%) is another significant factor, with the highest concern in Thailand (37.4%) and Myanmar

(28.4%), given these countries' economic dependence on trade and tourism from China. China's mistreatment of minorities in Tibet and Xinjiang and its handling of Hong Kong (12.1%), while a less dominant issue, is a concern in Brunei (20.5%), Cambodia (17.6%), and Laos (16.3%). China's forceful reunification with Taiwan (9.3%) is the least-cited concern but remains a factor, particularly in Brunei (12.5%), Singapore (11.7%), and Thailand (11.2%).

Among Timor-Leste respondents, the largest proportion (47.8%) are concerned about China's use of economic tools and tourism to punish their foreign policy choices.



986 respondents excluding Timor-Leste 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 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		China's tacit support for Russian invasion of Ukraine	China's growing economic dominance and political influence in my country
	2024	2025	2024	2025	2024	2025	2024	2025	2024	2025	2024	2024
ASEAN-10	35.0%	21.7%	21.5%	12.1%	37.2%	28.8%	33.5%	28.2%	18.3%	9.3%	16.0%	38.5%
BN	39.0%	18.2%	46.3%	20.5%	39.0%	29.5%	22.0%	19.3%	29.3%	12.5%	12.2%	12.2%
KH	43.1%	21.6%	22.0%	17.6%	26.0%	20.6%	30.9%	31.4%	11.4%	8.8%	15.4%	51.2%
ID	19.9%	20.5%	27.6%	14.6%	40.9%	21.1%	39.8%	36.3%	11.6%	7.6%	18.8%	41.4%
LA	43.1%	19.2%	26.6%	16.3%	25.7%	29.8%	30.3%	26.0%	13.8%	8.7%	15.6%	45.0%
MY	32.7%	25.5%	20.4%	15.0%	49.0%	24.2%	29.3%	26.8%	24.5%	8.5%	13.6%	30.6%
MM	34.0%	28.4%	12.8%	16.4%	27.7%	20.9%	34.0%	26.9%	17.0%	7.5%	21.3%	53.2%
PH	25.8%	19.2%	16.1%	7.7%	54.8%	46.2%	35.5%	19.2%	9.7%	7.7%	6.5%	51.6%
SG	41.1%	16.2%	12.1%	5.4%	31.5%	24.3%	40.3%	42.3%	33.1%	11.7%	26.6%	15.3%
TH	31.9%	37.4%	14.3%	5.6%	21.8%	16.8%	47.1%	29.0%	9.2%	11.2%	19.3%	56.3%
VN	39.6%	10.5%	16.8%	1.8%	55.4%	54.4%	25.7%	24.6%	23.8%	8.8%	10.9%	27.7%
TL	N.A.	47.8%	N.A.	15.2%	N.A.	10.9%	N.A.	17.4%	N.A.	8.7%	N.A.	N.A.

Timor-Leste: 46 respondents who chose the "Improve" and "Improve Significantly" options in Q34

Note: In 2025, the question format was changed from a "choose two" to a "choose one" response.

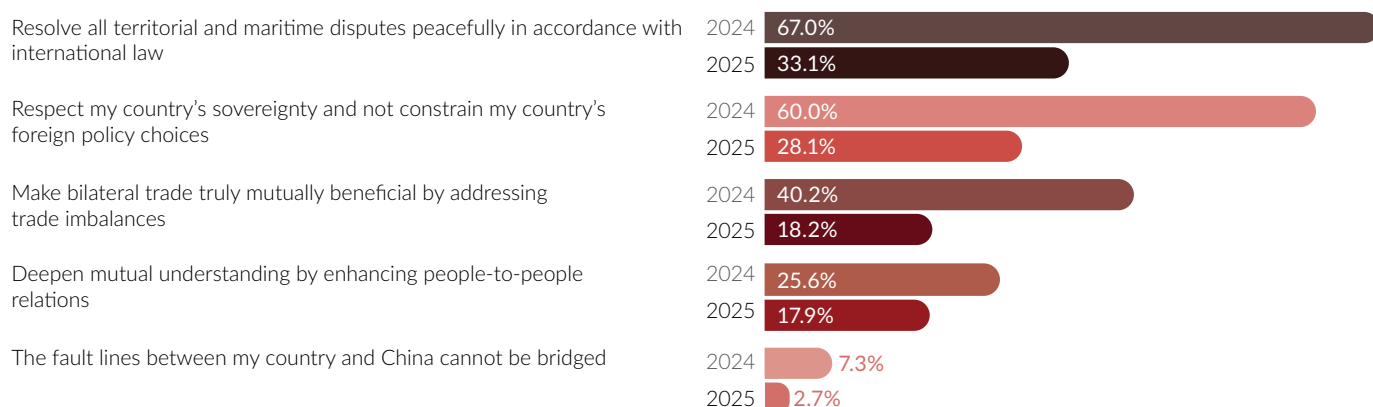
Q34B What can China do to improve relations with your country? (Check 1 response)

The top priority for ASEAN-10 respondents is for China to resolve territorial and maritime disputes peacefully in accordance with international law (33.1%). This is particularly pressing for the Philippines (72.1%), Vietnam (60.6%), Indonesia (50.0%) and Malaysia (50.0%), where tensions in the South China Sea continue to be a major source of friction in bilateral relations.

Respecting national sovereignty and not constraining foreign policy choices (28.1%) rank as the second-highest priority for ASEAN-10, particularly in Myanmar (63.8%), Brunei (42.9%) and Laos (35.3%). Making bilateral trade

truly mutually beneficial by addressing trade imbalances (18.2%) remains a key concern, especially in Thailand (48.4%). Deepening mutual understanding through people-to-people relations (17.9%) is another area identified for improvement. Only a small minority of respondents (2.7%) believe that the fault lines between their country and China cannot be bridged.

Timor-Leste respondents are split 50-50 between two options of mutually beneficial trade by addressing trade imbalances and closer exchanges to strengthen bilateral ties.



374 respondents excluding Timor-Leste 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	
	2024	2025	2024	2025	2024	2025	2024	2025	2024	2025
ASEAN-10	67.0%	33.1%	40.2%	18.2%	25.6%	17.9%	60.0%	28.1%	7.3%	2.7%
BN	66.7%	14.3%	41.7%	0.0%	33.3%	42.9%	58.3%	42.9%	0.0%	0.0%
KH	67.5%	18.5%	42.5%	29.6%	37.5%	22.2%	40.0%	29.6%	12.5%	0.0%
ID	78.6%	50.0%	50.0%	25.0%	21.4%	16.7%	50.0%	8.3%	0.0%	0.0%
LA	40.0%	17.6%	75.0%	11.8%	25.0%	29.4%	55.0%	35.3%	5.0%	5.9%
MY	70.6%	50.0%	41.2%	16.7%	29.4%	16.7%	52.9%	16.7%	5.9%	0.0%
MM	49.1%	8.7%	34.5%	11.6%	30.9%	11.6%	67.3%	63.8%	18.2%	4.3%
PH	92.4%	72.1%	14.5%	5.9%	6.1%	2.9%	84.7%	16.9%	2.3%	2.2%
SG	72.7%	29.4%	31.8%	23.5%	22.7%	17.6%	72.7%	23.5%	0.0%	5.9%
TH	53.8%	9.7%	38.5%	48.4%	38.5%	16.1%	61.5%	25.8%	7.7%	0.0%
VN	78.6%	60.6%	32.1%	9.1%	10.7%	3.0%	57.1%	18.2%	21.4%	9.1%
TL	N.A.	0.0%	N.A.	50.0%	N.A.	50.0%	N.A.	0.0%	N.A.	0.0%

Timor-Leste: 4 respondents who chose the "Worsen" and "Worsen Significantly" options in Q34

Note: In 2025, the question format was changed from a "choose two" to a "choose one" response.

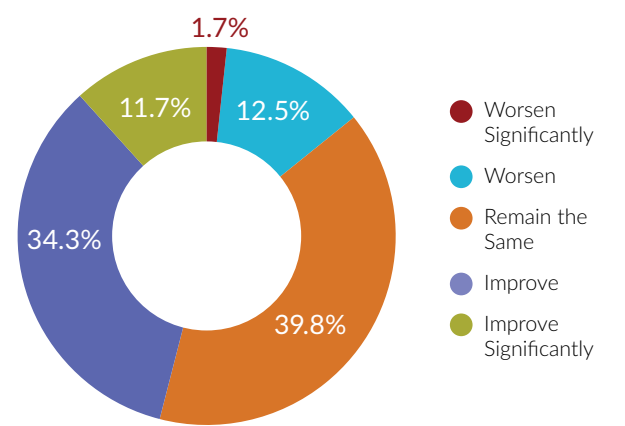
THE FUTURE OF THE US' RELATIONS WITH REGIONAL COUNTRIES

ASEAN-10 respondents are generally positive about their country's relations with the US over the next four years, with 46.0% expecting ties to improve – comprising 11.7% foreseeing significant improvement and 34.3% anticipating moderate improvement. Optimism is particularly high in Vietnam (73.6%), Laos (65.6%), and Cambodia (57.0%), suggesting that these countries see growing opportunities in their engagement with Washington.

Meanwhile, 39.8% of ASEAN-10 respondents expect relations with the US to remain the same, with this sentiment most prevalent in Singapore (57.4%), Indonesia (54.4%) and Malaysia (50.0%), indicating that they do not anticipate major shifts in their existing partnerships.

However, 14.2% of respondents believe relations with the US will deteriorate, with 12.5% predicting moderate deterioration and 1.7% anticipating significant worsening. Concerns about worsening ties are highest in Malaysia (25.1%), Indonesia (19.1%), and Thailand (18.4%), suggesting unease over potential US policy shifts, economic uncertainties or divergent strategic priorities.

A large majority of Timor-Leste respondents (62.1%) express strong optimism over their country's relations with the US over the next four years, followed by more than a third (36.4%) who believe that relations will remain the same.



Q35 How do you see your country's relations with the United States evolving in the next four years?

Country	Worsen Significantly	Worsen	Remain the Same	Improve	Improve Significantly
ASEAN-10	1.7%	12.5%	39.8%	34.3%	11.7%
BN	1.3%	10.1%	39.6%	37.6%	11.4%
KH	1.7%	9.3%	32.0%	41.9%	15.1%
ID	2.4%	16.7%	54.4%	22.6%	4.0%
LA	1.3%	7.9%	25.2%	54.3%	11.3%
MY	3.8%	21.3%	50.0%	20.0%	5.0%
MM	2.1%	9.8%	40.7%	34.0%	13.4%
PH	1.0%	7.3%	40.3%	35.4%	16.0%
SG	1.7%	16.9%	57.4%	20.2%	3.7%
TH	0.0%	18.4%	41.3%	30.1%	10.2%
VN	1.3%	7.7%	17.4%	47.1%	26.5%
TL	0.0%	1.5%	36.4%	43.9%	18.2%

Q35A What could potentially worsen your positive impression of the United States? (Check 1 response)

ASEAN-10 respondents with an optimistic view of the US are most concerned about US interference in their countries' domestic affairs (29.2%), particularly in Singapore (44.8%), the Philippines (40.6%), Vietnam (36.8%), and Cambodia (31.6%).

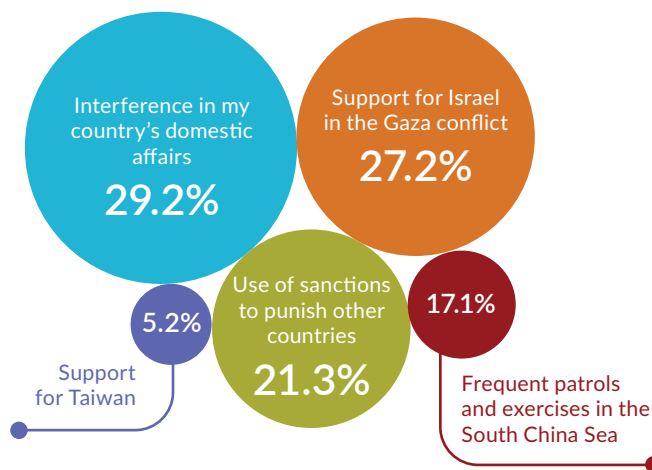
US support for Israel in the Gaza conflict (27.2%) is another significant concern, particularly in Indonesia (59.7%) and Malaysia (46.7%). Discontent over Washington's stance on the conflict aligns with broader dissatisfaction in Muslim-majority countries and among those advocating for stronger support for Palestinian statehood.

The US' use of sanctions to punish other countries (21.3%) is also a key issue, with the highest dissatisfaction in Thailand (31.6%) and Vietnam (25.4%). Economic measures such as sanctions may be viewed as disproportionately affecting developing countries.

Frequent US patrols and exercises in the South China Sea (17.1%) are viewed as a concern in some ASEAN-10 countries, particularly in Brunei (27.4%), Myanmar (27.2%), and Cambodia (23.5%). While regional countries generally welcome US security commitments, some perceive these activities as heightening tensions and provoking conflict in an already contested region.

US support for Taiwan (5.2%) is the least-cited concern but registers slightly higher in Brunei (12.3%), Myanmar (8.7%), and Laos (8.1%).

For Timor-Leste, fear of US sanctions ranks the highest at 46.3% followed by US support for Israel in the Gaza conflict at 22.0%.



846 respondents excluding Timor-Leste who chose the "Improve" and "Improve Significantly" options in Q35

Country	US' frequent patrols and exercises in the South China Sea	US' interference in my country's domestic affairs	US' support for Israel in the Gaza conflict	US' support for Taiwan	US' use of sanctions to punish other countries
ASEAN-10	17.1%	29.2%	27.2%	5.2%	21.3%
BN	27.4%	24.7%	20.5%	12.3%	15.1%
KH	23.5%	31.6%	24.5%	6.1%	14.3%
ID	0.0%	20.9%	59.7%	3.0%	16.4%
LA	15.2%	29.3%	26.3%	8.1%	21.2%
MY	10.0%	18.3%	46.7%	1.7%	23.3%
MM	27.2%	19.6%	22.8%	8.7%	21.7%
PH	17.9%	40.6%	12.3%	0.9%	28.3%
SG	13.8%	44.8%	22.4%	3.4%	15.5%
TH	16.5%	25.3%	20.3%	6.3%	31.6%
VN	19.3%	36.8%	16.7%	1.8%	25.4%
TL	7.3%	19.5%	22.0%	4.9%	46.3%

Timor-Leste: 41 who chose the "Improve" and "Improve Significantly" options in Q35

Q35B What can the United States do to improve relations with your country? (Check 1 response)

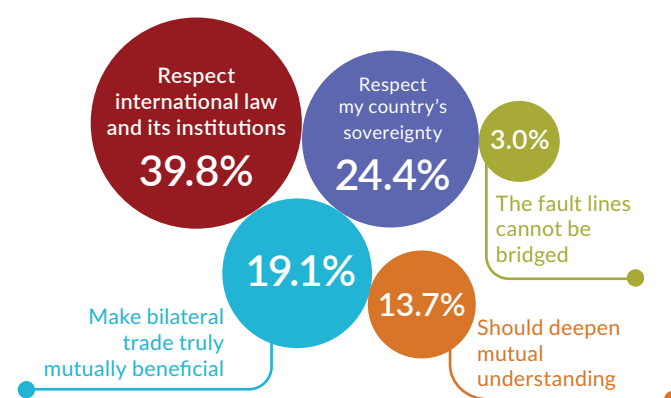
ASEAN-10 respondents who are pessimistic about their relations with the US choose respect for international law and not undermining the global system (39.8%) as their top priority. This is particularly emphasised by respondents in Malaysia (66.7%), Singapore (60.0%), and Vietnam (42.9%). These findings reflect concerns over Washington's commitment to multilateralism, the rules-based order and global institutions, with expectations that the US will reinforce rather than circumvent these frameworks.

Respecting national sovereignty and not constraining foreign policy choices (24.4%) rank as the second-highest priority for ASEAN-10, particularly in Cambodia (47.4%), the Philippines (35.3%), and Indonesia (31.3%). This suggests that ASEAN countries remain wary of US policies perceived as interfering in domestic affairs or pressuring countries to align with specific geopolitical agendas.

Making bilateral trade truly mutually beneficial by addressing trade imbalances (19.1%) is the ASEAN-10's third option, particularly in Thailand (38.9%), Vietnam (35.7%), Brunei and the Philippines (both 23.5%). ASEAN countries have consistently emphasised the need for greater access to US markets and more balanced trade policies.

Deepening mutual understanding through people-to-people relations (13.7%) is another area identified for improvement, with the strongest support in Myanmar (30.4%) and Cambodia (26.3%). A small minority (3.0%) believe that the fault lines between their country and the US cannot be bridged, with the highest responses in Laos (14.3%), Myanmar (8.7%), and Cambodia (5.3%). While this is not a widespread view, it reflects persistent scepticism in certain ASEAN-10 countries towards the US.

For Timor-Leste, the view that the US should respect international law and not undermine the global system is particularly salient, with 100.0% support.



293 respondents excluding Timor-Leste who chose the “Worsen” and “Worsen Significantly” options in Q35

Country	The US should respect international law and its institutions and not undermine the global system	The US should make bilateral trade truly mutually beneficial by addressing trade imbalances	The US should deepen mutual understanding by enhancing people-to-people relations	The US should respect my country's sovereignty and not constrain my country's foreign policy choices	The fault lines between my country and US cannot be bridged
ASEAN-10	39.8%	19.1%	13.7%	24.4%	3.0%
BN	23.5%	23.5%	11.8%	41.2%	0.0%
KH	15.8%	5.3%	26.3%	47.4%	5.3%
ID	47.9%	10.4%	10.4%	31.3%	0.0%
LA	42.9%	0.0%	14.3%	28.6%	14.3%
MY	66.7%	18.3%	1.7%	11.7%	1.7%
MM	30.4%	13.0%	30.4%	17.4%	8.7%
PH	29.4%	23.5%	11.8%	35.3%	0.0%
SG	60.0%	22.2%	8.9%	8.9%	0.0%
TH	38.9%	38.9%	13.9%	8.3%	0.0%
VN	42.9%	35.7%	7.1%	14.3%	0.0%
TL	100.0%	0.0%	0.0%	0.0%	0.0%

Timor-Leste: 1 respondent who chose the “Worsen” and “Worsen Significantly” options in Q35

ASSESSING US ENGAGEMENT IN THE REGION

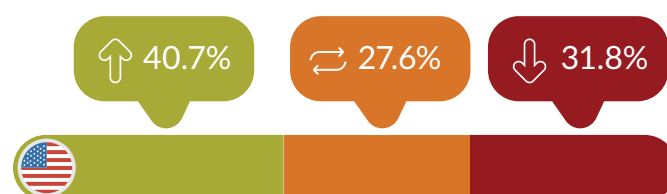
By the final year of the Biden Administration as shown in the results of *The State of Southeast Asia 2024*, most of the ASEAN member states felt that US engagement with Southeast Asia on the whole was either unchanged (36.6%) or had decreased or decreased significantly in aggregate (38.2%). In particular, Brunei, Malaysia, and Cambodia shared this negative sentiment most strongly.

Contrary to 2024 findings, the largest proportion of ASEAN-10 respondents (40.7%) feel that US engagement with the region under President Trump will either increase or increase significantly this year. The countries exhibiting the strongest sentiment in this regard are Laos (63.5%), Vietnam (58.7%), and Brunei and Cambodia (both at 51.7%). Thus, there seems to be a significant change of view of the US under a second Trump term.

About a third of ASEAN-10 respondents (31.8%) feel that engagement will either decrease or decrease significantly under the second Trump term. Among this group, Singapore (50.4%) is most pessimistic about US engagement in the region followed by Malaysia (48.3%) and Thailand (40.9%).

The last group of ASEAN-10 respondents (27.6%) feel that engagement will remain unchanged. Of this group, the Philippines (35.9%), Indonesia (34.9%), and Singapore (32.6%) exhibit the strongest sentiments.

Timor-Leste was more split in its with sentiments with respect to US engagement for both the increase and increase significantly (37.8%) option, as well as the decrease and decrease significantly (36.3%) responses.



Q36 The level of US engagement with Southeast Asia under the Trump 2.0 Administration will...

Country	Decrease	Decrease Significantly	Remain Unchanged	Increase	Increase Significantly
ASEAN-10	25.3%	6.5%	27.6%	32.2%	8.5%
BN	16.8%	5.4%	26.2%	36.9%	14.8%
KH	16.3%	4.1%	27.9%	42.4%	9.3%
ID	29.0%	7.5%	34.9%	26.6%	2.0%
LA	14.6%	5.3%	16.6%	45.0%	18.5%
MY	38.3%	10.0%	26.7%	21.7%	3.3%
MM	18.6%	9.3%	27.8%	33.0%	11.3%
PH	24.8%	3.9%	35.9%	28.2%	7.3%
SG	43.0%	7.4%	32.6%	15.7%	1.2%
TH	32.7%	8.2%	29.1%	25.0%	5.1%
VN	18.7%	4.5%	18.1%	47.1%	11.6%
TL	33.3%	3.0%	25.8%	33.3%	4.5%

Q36A Why do you think the level of US engagement with Southeast Asia will increase?

Among those who feel that US engagement with Southeast Asia would increase under the Trump 2.0 Administration, 38.7% of ASEAN-10 respondents feel that President Trump's tough stance on China would help maintain a balance of power in the region. This sentiment is mostly shared by Laos (45.8%), Singapore (43.9%), and Myanmar (43.0%). Interestingly, another 31.7% of ASEAN-10 respondents also feel that President Trump's strong leadership could resolve conflicts around the world, with Thailand (44.1%), Vietnam (38.5%), and Cambodia (38.2%) feeling most strongly about this. Only 29.6% of respondents feel that President Trump may work with some Southeast Asian countries against China. Those who believe this mostly come from Indonesia (47.2%) and Singapore (41.5%).

For Timor-Leste, a majority of respondents (64.0%) feel that President Trump's strong leadership could resolve conflicts, while the second largest proportion (24.0%) of respondents attribute it to President Trump's tough stance on China in maintaining a balance of power.

744 respondents excluding Timor-Leste who chose the "Increase" and "Increase Significantly" options in Q36

Country	Strong US leadership under Trump can resolve conflicts around the world	Trump might work with some Southeast Asian countries against China	Trump's tough stance on China will help maintain a balance of power
ASEAN-10	31.7%	29.6%	38.7%
BN	33.8%	28.6%	37.7%
KH	38.2%	23.6%	38.2%
ID	18.1%	47.2%	34.7%
LA	31.3%	22.9%	45.8%
MY	30.0%	35.0%	35.0%
MM	31.4%	25.6%	43.0%
PH	37.0%	24.7%	38.4%
SG	14.6%	41.5%	43.9%
TH	44.1%	25.4%	30.5%
VN	38.5%	22.0%	39.6%
TL	64.0%	12.0%	24.0%

Timor-Leste: 25 respondents who chose the "Increase" and "Increase Significantly" options in Q36

Q36B Why do you think the level of US engagement with Southeast Asia will decrease?

Among those who feel that US engagement with Southeast Asia would decrease under the Trump 2.0 administration, 51.2% of ASEAN-10 respondents say that President Trump's unpredictability in approaching foreign policy adds uncertainty to the US' engagement. This sentiment is most strongly shared by Thailand (63.8%), Vietnam (58.3%), and Malaysia (56.0%).

32.3% of ASEAN-10 respondents overall are of the view that the Trump Administration lacked strategic interest in Southeast Asia. Cambodia (45.7%), the Philippines (40.7%) and Singapore (38.5%) are more inclined to this view.

Additionally, the smallest proportion of ASEAN-10 respondents (16.5%) feel that President Trump would ignore Southeast Asia and work with China directly. Laos (26.7%), Brunei (24.2%), Myanmar and Vietnam (both at 22.2%) share this view more strongly.

657 respondents excluding Timor-Leste who chose the "Decrease" and "Decrease Significantly" options in Q36

Country	President Trump's unpredictability adds uncertainty to US engagement with the region	The Trump Administration's lack of strategic interest in Southeast Asia	Trump will ignore Southeast Asia and work with China directly
ASEAN-10	51.2%	32.3%	16.5%
BN	42.4%	33.3%	24.2%
KH	40.0%	45.7%	14.3%
ID	55.4%	28.3%	16.3%
LA	40.0%	33.3%	26.7%
MY	56.0%	31.0%	12.9%
MM	50.0%	27.8%	22.2%
PH	52.5%	40.7%	6.8%
SG	53.3%	38.5%	8.2%
TH	63.8%	25.0%	11.3%
VN	58.3%	19.4%	22.2%
TL	66.7%	33.3%	0.0%

Timor-Leste: 24 respondents who chose the "Decrease" and "Decrease Significantly" options in Q36

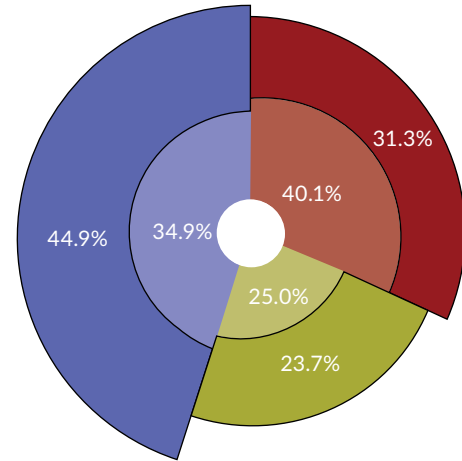
IS THE US A RELIABLE STRATEGIC PARTNER?

Confidence in the US as a strategic partner and provider of regional security has surprisingly increased following the election of President Trump, with 44.9% of ASEAN-10 respondents expressing confidence – including 8.8% who are very confident and 36.1% who are confident. This sentiment is strongest in Laos (60.9%), the Philippines (60.2%), and Vietnam (58.1%). For the latter two who are claimant states in the South China Sea, the US is viewed as a key security counterbalance.

Meanwhile, 23.7% of ASEAN-10 respondents remain neutral (no comment), with the highest responses in Singapore (30.6%), Vietnam (27.7%), and Malaysia (27.5%). This suggests that respondents may be taking a wait-and-see approach to US engagement in the region under Trump 2.0.

However, 31.3% of ASEAN-10 respondents express little or no confidence, including 23.6% who have little confidence and 7.7% who have no confidence. Distrust is most pronounced in Indonesia (51.9%), Malaysia (51.7%) and Singapore (38.8%), reflecting possible concerns over Washington's reliability and shifting policies under Trump 2.0.

The largest proportion (42.4%) of Timor-Leste respondents express neutrality, closely followed by those expressing confidence (40.9%) in the US as a strategic partner - including 10.6% who are very confident and 30.3% who are confident.



2025

● No/Little Confidence

● No Comment

● Confident/Very Confident

2024

● No/Little Confidence

● No Comment

● Confident/Very Confident

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	
	2024	2025	2024	2025	2024	2025	2024	2025	2024	2025
ASEAN-10	12.4%	7.7%	27.7%	23.6%	25.0%	23.7%	29.3%	36.1%	5.6%	8.8%
BN	24.7%	8.1%	33.8%	16.1%	28.6%	23.5%	11.7%	40.3%	1.3%	12.1%
KH	10.6%	2.9%	33.9%	20.9%	14.3%	23.8%	30.7%	43.0%	10.6%	9.3%
ID	29.4%	20.6%	31.3%	31.3%	18.5%	24.6%	18.1%	20.6%	2.6%	2.8%
LA	12.5%	6.0%	25.6%	14.6%	41.3%	18.5%	18.8%	41.7%	1.9%	19.2%
MY	15.6%	14.6%	36.9%	37.1%	25.8%	27.5%	20.0%	17.9%	1.8%	2.9%
MM	9.0%	7.2%	22.2%	21.6%	30.2%	21.6%	29.6%	38.1%	9.0%	11.3%
PH	2.3%	2.4%	22.8%	20.4%	13.5%	17.0%	49.8%	49.5%	11.6%	10.7%
SG	11.0%	7.4%	27.5%	31.4%	23.8%	30.6%	34.4%	28.1%	3.3%	2.5%
TH	5.5%	6.1%	28.4%	30.6%	24.4%	22.4%	36.8%	34.2%	5.0%	6.6%
VN	3.5%	1.9%	15.0%	12.3%	29.5%	27.7%	43.5%	47.1%	8.5%	11.0%
TL	N.A.	3.0%	N.A.	13.6%	N.A.	42.4%	N.A.	30.3%	N.A.	10.6%

Perceptions of Trust 57-69

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

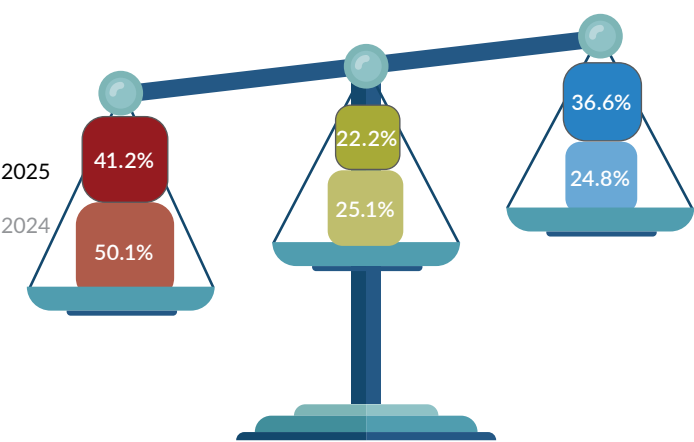
In 2024, a majority of ASEAN-10 respondents (50.1%) expressed little confidence (34.8%) or no confidence (15.3%) in China’s ability to “do the right thing” in contributing to global peace, security, prosperity, and governance. This year, scepticism eased slightly to 41.2% and confidence in China also saw a notable improvement, rising from 24.8% to 36.6% — an increase of 11.8 percentage points from 2024.

ASEAN-10 countries are divided in their trust toward China. This year, trust levels in Laos (66.2%), Brunei (50.3%), Thailand (42.3%), and Cambodia (41.2%) exceed distrust. Meanwhile, in the remaining six ASEAN-10 countries, distrust remains higher than trust. Among those who trust China, 41.6% attribute this to China’s vast economic resources and strong political will to provide global leadership. 20.1% agree that China is a responsible stakeholder that respects and champions international law, while 14.5% view that their countries’ political culture and worldviews are compatible with China’s.

Among those who distrust China, 47.6% believe that its economic and military power threatens their countries’ interests and sovereignty. This view is particularly strong in the Philippines (69.9%) and Vietnam (53.2%), where escalating territorial disputes with China in the South China Sea have intensified in recent years. A significant proportion of respondents from this group also think that China is not a reliable power (22.5%), followed by those who feel that China is distracted by its internal affairs and thus cannot focus on global concerns (12.6%).

36.3% of Timor-Leste respondents are more inclined to trust China versus 28.8% who distrust China. Of those from Timor-Leste who trust China, an overwhelming 70.8% feel that China has vast economic resources and strong political will to provide global leadership. Of those who distrust China, the top cited reason is that China’s economic and military strength could threaten Timor-Leste’s interests and sovereignty (36.8%).

These evolving perceptions reflect a mix of optimism about China’s economic prospects and pessimism surrounding geopolitical tensions which are important factors that will continue to shape ASEAN’s long-term perceptions of China.



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	
	2024	2025	2024	2025	2024	2025	2024	2025	2024	2025
ASEAN-10	15.3%	13.8%	34.8%	27.4%	25.1%	22.2%	21.0%	28.5%	3.8%	8.1%
BN	9.1%	4.7%	33.8%	14.8%	41.6%	30.2%	13.0%	34.9%	2.6%	15.4%
KH	12.7%	6.4%	36.0%	31.4%	19.6%	20.9%	26.5%	33.1%	5.3%	8.1%
ID	9.4%	13.9%	39.6%	33.3%	17.0%	18.7%	30.6%	30.6%	3.4%	3.6%
LA	8.1%	6.6%	19.4%	11.3%	40.0%	15.9%	26.3%	43.7%	6.3%	22.5%
MY	8.4%	8.8%	32.0%	31.7%	27.6%	27.9%	27.1%	25.4%	4.9%	6.3%
MM	28.0%	24.7%	37.6%	20.6%	25.9%	20.6%	7.4%	24.7%	1.1%	9.3%
PH	28.8%	35.4%	42.3%	34.0%	14.9%	14.6%	13.0%	13.6%	0.9%	2.4%
SG	12.5%	7.9%	38.8%	37.6%	23.1%	26.0%	20.5%	25.2%	5.1%	3.3%
TH	11.4%	7.1%	36.3%	30.6%	18.4%	19.9%	30.3%	35.2%	3.5%	7.1%
VN	24.5%	22.6%	32.0%	28.4%	23.5%	27.1%	15.5%	18.7%	4.5%	3.2%
TL	N.A.	6.1%	N.A.	22.7%	N.A.	34.8%	N.A.	33.3%	N.A.	3.0%

Q38A Why do you trust China?

693 respondents excluding Timor-Leste 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		I respect China and admire its civilisation and culture	President Xi Jinping's 3 rd term has made China stronger and more stable
	2024	2025	2024	2025	2024	2025	2024	2025	2025	2024
ASEAN-10	53.1%	41.6%	14.2%	20.1%	9.9%	10.9%	11.5%	14.5%	12.9%	11.3%
BN	41.7%	29.3%	25.0%	24.0%	16.7%	20.0%	8.3%	14.7%	12.0%	8.3%
KH	46.7%	32.4%	11.7%	25.4%	10.0%	12.7%	8.3%	15.5%	14.1%	23.3%
ID	62.2%	69.8%	15.6%	14.0%	3.3%	0.0%	7.8%	8.1%	8.1%	11.1%
LA	50.0%	31.0%	21.2%	22.0%	11.5%	19.0%	5.8%	17.0%	11.0%	11.5%
MY	62.5%	60.5%	11.1%	23.7%	8.3%	2.6%	13.9%	2.6%	10.5%	4.2%
MM	31.3%	30.3%	6.3%	16.7%	25.0%	22.7%	12.5%	16.7%	13.6%	25.0%
PH	63.3%	42.4%	16.7%	12.1%	3.3%	9.1%	13.3%	9.1%	27.3%	3.3%
SG	54.3%	46.4%	12.9%	27.5%	11.4%	5.8%	12.9%	7.2%	13.0%	8.6%
TH	58.8%	44.6%	14.7%	18.1%	4.4%	8.4%	14.7%	21.7%	7.2%	7.4%
VN	60.0%	29.4%	7.5%	17.6%	5.0%	8.8%	17.5%	32.4%	11.8%	10.0%
TL	N.A.	70.8%	N.A.	0.0%	N.A.	12.5%	N.A.	0.0%	16.7%	N.A.

Timor-Leste: 24 respondents who chose the “Confident” and “Very Confident” options in Q38

Q38B Why do you distrust China?

831 respondents excluding Timor-Leste 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		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		China does not have the capacity or political will for global leadership	China's future stability has become more uncertain after the 20th Chinese Communist Party Congress
	2024	2025	2024	2025	2024	2025	2024	2025	2025	2024
ASEAN-10	45.5%	47.6%	15.4%	12.6%	10.1%	8.5%	17.6%	22.5%	8.8%	11.4%
BN	48.5%	58.6%	27.3%	10.3%	6.1%	3.4%	9.1%	20.7%	6.9%	9.1%
KH	19.6%	43.1%	29.3%	18.5%	12.0%	10.8%	14.1%	15.4%	12.3%	25.0%
ID	42.3%	47.1%	14.6%	20.2%	16.2%	11.8%	16.2%	12.6%	8.4%	10.8%
LA	36.4%	29.6%	15.9%	11.1%	18.2%	14.8%	11.4%	25.9%	18.5%	18.2%
MY	46.2%	42.3%	16.5%	16.5%	18.7%	11.3%	8.8%	22.7%	7.2%	9.9%
MM	51.6%	51.1%	6.5%	5.7%	8.1%	11.4%	29.0%	23.9%	8.0%	4.8%
PH	65.4%	69.9%	5.2%	8.4%	6.5%	2.8%	15.7%	15.4%	3.5%	7.2%
SG	35.0%	36.4%	14.3%	10.0%	5.7%	5.5%	31.4%	36.4%	11.8%	13.6%
TH	45.8%	44.6%	17.7%	18.9%	5.2%	5.4%	17.7%	27.0%	4.1%	13.5%
VN	64.6%	53.2%	7.1%	6.3%	4.4%	7.6%	22.1%	25.3%	7.6%	1.8%
TL	N.A.	36.8%	N.A.	15.8%	N.A.	26.3%	N.A.	10.5%	10.5%	N.A.

Timor-Leste: 19 respondents who chose the “Little Confidence” and “No Confidence” options in Q38

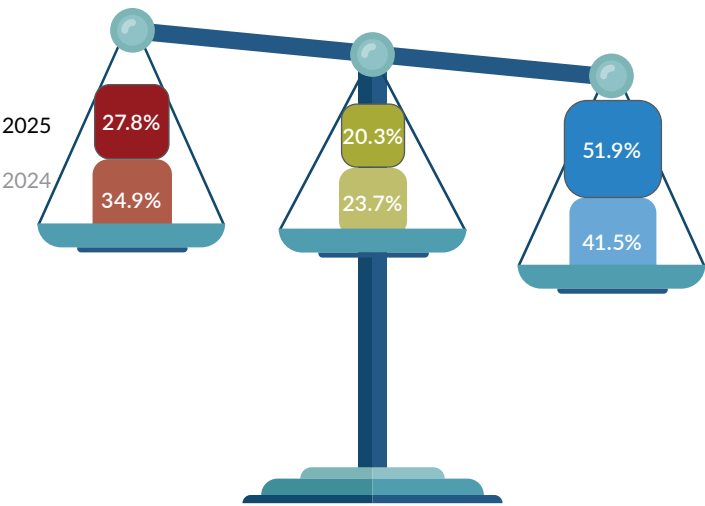
THE EUROPEAN UNION

The levels of trust in the EU saw a significant improvement this year, rising from 41.5% in 2024 to 51.9% this year for ASEAN-10 respondents. Consequently, the levels of distrust also declined, from 34.9% to 27.8% this year. Trust levels outstripped distrust in seven countries versus two who remain more distrustful of the EU. The highest levels of trust in the EU are strongly shared by respondents from Laos and Myanmar (both at 64.9%), and Cambodia (64.0%). Meanwhile, Indonesia (47.2%) and Malaysia (45.0%) are the only countries where distrust levels exceed trust whereas Singapore is equally split between trust and distrust (35.5% respectively).

ASEAN-10 respondents who are optimistic about the EU attribute their trust to its stance on the environment, human rights, and climate change (33.6%), followed by its commitment to respecting and championing international law (29.5%), and its vast economic resources and political will to provide global leadership (19.6%).

Overall, while trust in the EU has improved notably, concerns about its internal distractions and ability to project global leadership persist. In the group of EU sceptics, 35.6% of ASEAN-10 respondents 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 (56.1%), Singapore (46.5%), and Thailand (40.4%).

Timor-Leste's trust in the EU stands at 53.0% while its distrust stands at 21.2%. Those from Timor-Leste who trust the EU appreciate its stance on environment, human rights and climate change as an asset for global peace and security (48.6%). Those who distrust the EU express concerns that the EU is distracted by its own affairs (35.7%).



Q39 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	
	2024	2025	2024	2025	2024	2025	2024	2025	2024	2025
ASEAN-10	7.1%	4.7%	27.8%	23.1%	23.7%	20.3%	35.7%	42.3%	5.8%	9.6%
BN	10.4%	4.0%	36.4%	12.8%	35.1%	23.5%	16.9%	38.3%	1.3%	21.5%
KH	7.9%	3.5%	29.1%	15.1%	15.9%	17.4%	40.2%	50.0%	6.9%	14.0%
ID	14.0%	11.9%	40.0%	35.3%	14.7%	13.1%	27.2%	36.5%	4.2%	3.2%
LA	8.8%	3.3%	16.9%	14.6%	40.0%	17.2%	27.5%	49.0%	6.9%	15.9%
MY	9.8%	7.1%	32.9%	37.9%	25.8%	26.7%	28.9%	25.0%	2.7%	3.3%
MM	5.3%	4.6%	27.0%	17.0%	26.5%	13.4%	34.9%	50.0%	6.3%	14.9%
PH	2.8%	2.4%	22.3%	25.2%	11.6%	16.5%	54.4%	51.0%	8.8%	4.9%
SG	5.5%	4.1%	37.7%	31.4%	19.4%	28.9%	33.3%	32.6%	4.0%	2.9%
TH	4.5%	3.6%	22.4%	23.0%	24.9%	24.0%	43.3%	41.3%	5.0%	8.2%
VN	2.0%	2.6%	13.0%	18.7%	23.0%	22.6%	50.5%	49.0%	11.5%	7.1%
TL	N.A.	4.5%	N.A.	16.7%	N.A.	25.8%	N.A.	42.4%	N.A.	10.6%

Q39A Why do you trust the EU?

976 respondents excluding Timor-Leste who chose the “Confident” and “Very Confident” options in Q39

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	
	2024	2025	2024	2025	2024	2025	2024	2025	2024	2025
ASEAN-10	9.4%	6.8%	4.8%	10.5%	25.8%	19.6%	28.3%	29.5%	31.7%	33.6%
BN	21.4%	11.2%	0.0%	20.2%	14.3%	10.1%	28.6%	29.2%	35.7%	29.2%
KH	7.9%	9.1%	6.7%	10.0%	42.7%	11.8%	14.6%	40.0%	28.1%	29.1%
ID	9.6%	3.0%	3.6%	4.0%	25.3%	32.0%	31.3%	31.0%	30.1%	30.0%
LA	12.7%	8.2%	9.1%	23.5%	25.5%	13.3%	18.2%	20.4%	34.5%	34.7%
MY	2.8%	4.4%	2.8%	2.9%	28.2%	23.5%	29.6%	30.9%	36.6%	38.2%
MM	20.5%	9.5%	0.0%	16.7%	26.9%	12.7%	33.3%	31.7%	19.2%	29.4%
PH	7.4%	13.0%	5.9%	4.3%	31.6%	27.0%	22.1%	20.9%	33.1%	34.8%
SG	5.9%	3.5%	9.8%	8.1%	7.8%	8.1%	42.2%	43.0%	34.3%	37.2%
TH	2.1%	1.0%	7.2%	13.4%	20.6%	20.6%	25.8%	21.6%	44.3%	43.3%
VN	3.2%	4.6%	3.2%	2.3%	34.7%	36.8%	37.9%	26.4%	21.0%	29.9%
TL	N.A.	8.6%	N.A.	5.7%	N.A.	22.9%	N.A.	14.3%	N.A.	48.6%

Timor-Leste: 25 respondents who chose the “Confident” and “Very Confident” options in Q39

Q39B Why do you distrust the EU?

581 respondents excluding Timor-Leste who chose the “Little Confidence” and “No Confidence” options in Q39

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	
	2024	2025	2024	2025	2024	2025	2024	2025	2024	2025
ASEAN-10	28.7%	35.6%	16.5%	12.5%	28.2%	24.6%	11.1%	9.9%	15.5%	17.4%
BN	25.0%	28.0%	13.9%	8.0%	22.2%	20.0%	8.3%	12.0%	30.6%	32.0%
KH	21.4%	18.8%	20.0%	25.0%	35.7%	37.5%	14.3%	15.6%	8.6%	3.1%
ID	24.5%	31.9%	14.7%	10.9%	21.0%	13.4%	16.1%	21.0%	23.8%	22.7%
LA	19.5%	29.6%	24.4%	18.5%	26.8%	22.2%	17.1%	11.1%	12.2%	18.5%
MY	27.1%	32.4%	8.3%	9.3%	33.3%	27.8%	12.5%	7.4%	18.8%	23.1%
MM	14.8%	33.3%	23.0%	14.3%	34.4%	28.6%	13.1%	0.0%	14.8%	23.8%
PH	40.7%	56.1%	18.5%	10.5%	14.8%	19.3%	16.7%	8.8%	9.3%	5.3%
SG	40.7%	46.5%	5.1%	5.8%	39.0%	30.2%	3.4%	2.3%	11.9%	15.1%
TH	33.3%	40.4%	16.7%	7.7%	18.5%	19.2%	9.3%	17.3%	22.2%	15.4%
VN	40.0%	39.4%	20.0%	15.2%	36.7%	27.3%	0.0%	3.0%	3.3%	15.2%
TL	N.A.	35.7%	N.A.	14.3%	N.A.	28.6%	N.A.	14.3%	N.A.	7.1%

Timor-Leste: 14 respondents who chose the “Little Confidence” and “No Confidence” options in Q39

INDIA

Approximately a third of ASEAN-10 respondents have reservations about India's ability to contribute to global peace, security, prosperity, and governance (35.8%). However, this level of distrust is nearly matched by this year's trust levels (35.3%), thus presenting mixed sentiments about the prospects of India's role in the region.

Six of the ASEAN-10 countries hold greater trust than distrust of India. These are: Laos, Brunei, Cambodia, Myanmar, the Philippines and Vietnam. The four countries whose distrust outstripped trust in India are: Malaysia (61.7%), Singapore (56.6%), Indonesia (54.4%), and Thailand (32.1%).

Of the ASEAN-10 cohort that trusts India, 30.1% believe that it is a responsible stakeholder that respects and champions international law. This view is shared strongly in Vietnam (49.1%), Singapore (37.5%), Indonesia (37.3%) Brunei (32.5%), and Cambodia (26.4%). Almost a fifth (19.0%) of this cohort agree that India has vast economic resources and the political will to provide global leadership.

Among the ASEAN-10 respondents who distrust India, 40.2% believe that India does not have the capacity or political will for global leadership. This view is more pronounced in Cambodia (53.7%), Laos (44.1%), Thailand (42.9%), and Indonesia (41.6%). Next, 30.3% feel that India is distracted with its internal and sub-continental affairs and thus cannot focus on global concerns and issues.

Timor-Leste's distrust towards India (36.4%) slightly outweighs their trust levels (31.8%). Those from Timor-Leste that trust India point to its vast economic resources and political will to provide global leadership (47.6%) whereas those who distrust India do not believe India to be a responsible or reliable power (33.3%).



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

Country	No Confidence		Little Confidence		No Comment		Confident		Very Confident	
	2024	2025	2024	2025	2024	2025	2024	2025	2024	2025
ASEAN-10	14.2%	12.5%	30.5%	23.3%	31.0%	28.8%	20.5%	27.7%	3.7%	7.6%
BN	23.4%	8.1%	31.2%	6.7%	35.1%	29.5%	7.8%	34.9%	2.6%	20.8%
KH	19.6%	7.6%	37.6%	16.3%	23.3%	25.6%	15.3%	41.9%	4.2%	8.7%
ID	27.9%	31.0%	34.3%	23.4%	18.5%	25.4%	17.0%	18.7%	2.3%	1.6%
LA	8.1%	9.9%	18.8%	12.6%	45.0%	19.9%	21.9%	38.4%	6.3%	19.2%
MY	17.3%	22.9%	38.2%	38.8%	27.6%	25.4%	13.8%	11.7%	3.1%	1.3%
MM	13.8%	8.8%	28.0%	20.1%	38.1%	30.9%	17.5%	30.4%	2.6%	9.8%
PH	3.7%	5.3%	36.3%	29.6%	24.2%	29.1%	32.6%	32.5%	3.3%	3.4%
SG	19.0%	16.1%	37.4%	40.5%	26.4%	30.2%	14.3%	12.8%	2.9%	0.4%
TH	6.0%	6.6%	25.9%	25.5%	35.8%	37.2%	30.3%	24.0%	2.0%	6.6%
VN	3.5%	8.4%	17.5%	20.0%	36.5%	34.8%	34.5%	32.3%	8.0%	4.5%
TL	N.A.	10.6%	N.A.	25.8%	N.A.	31.8%	N.A.	30.3%	N.A.	1.5%

Q40A Why do you trust India?

640 respondents excluding Timor-Leste who chose the “Confident” and “Very Confident” options in Q40

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	
	2024	2025	2024	2025	2024	2025	2024	2025	2024	2025
ASEAN-10	21.2%	17.3%	22.4%	19.0%	27.4%	30.1%	13.7%	16.2%	15.2%	17.5%
BN	0.0%	20.5%	12.5%	10.8%	75.0%	32.5%	12.5%	19.3%	0.0%	16.9%
KH	24.3%	18.4%	27.0%	9.2%	10.8%	26.4%	24.3%	25.3%	13.5%	20.7%
ID	21.6%	11.8%	25.5%	25.5%	23.5%	37.3%	9.8%	5.9%	19.6%	19.6%
LA	15.6%	17.2%	35.6%	14.9%	13.3%	23.0%	15.6%	31.0%	20.0%	13.8%
MY	26.3%	22.6%	28.9%	32.3%	15.8%	19.4%	7.9%	6.5%	21.1%	19.4%
MM	23.7%	24.4%	15.8%	16.7%	26.3%	25.6%	15.8%	23.1%	18.4%	10.3%
PH	28.6%	23.0%	20.8%	17.6%	18.2%	28.4%	14.3%	16.2%	18.2%	14.9%
SG	38.3%	9.4%	14.9%	21.9%	27.7%	37.5%	8.5%	9.4%	10.6%	21.9%
TH	13.8%	15.0%	24.6%	25.0%	29.2%	21.7%	10.8%	11.7%	21.5%	26.7%
VN	20.0%	10.5%	18.8%	15.8%	34.1%	49.1%	17.6%	14.0%	9.4%	10.5%
TL	N.A.	28.6%	N.A.	47.6%	N.A.	9.5%	N.A.	4.8%	N.A.	9.5%

Timor-Leste: 21 respondents who chose the “Confident” and “Very Confident” options in Q40

Q40B Why do you distrust India?

754 respondents excluding Timor-Leste who chose the “Little Confidence” and “No Confidence” options in Q40

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	
	2024	2025	2024	2025	2024	2025	2024	2025	2024	2025
ASEAN-10	26.4%	30.3%	40.6%	40.2%	2.9%	2.7%	10.0%	5.8%	20.1%	21.0%
BN	28.6%	45.5%	31.0%	40.9%	2.4%	0.0%	16.7%	0.0%	21.4%	13.6%
KH	16.7%	24.4%	43.5%	53.7%	8.3%	2.4%	11.1%	4.9%	20.4%	14.6%
ID	18.2%	23.4%	40.0%	41.6%	2.4%	1.5%	12.7%	5.8%	26.7%	27.7%
LA	16.3%	29.4%	46.5%	44.1%	2.3%	0.0%	16.3%	0.0%	18.6%	26.5%
MY	34.4%	32.4%	30.4%	33.8%	1.6%	0.7%	8.0%	7.4%	25.6%	25.7%
MM	22.8%	28.6%	39.2%	37.5%	6.3%	7.1%	7.6%	3.6%	24.1%	23.2%
PH	32.6%	33.3%	34.9%	26.4%	3.5%	5.6%	7.0%	11.1%	22.1%	23.6%
SG	38.3%	34.3%	35.1%	40.1%	0.0%	3.6%	0.6%	3.6%	26.0%	18.2%
TH	25.0%	22.2%	48.4%	42.9%	0.0%	6.3%	12.5%	12.7%	14.1%	15.9%
VN	31.0%	29.5%	57.1%	40.9%	2.4%	0.0%	7.1%	9.1%	2.4%	20.5%
TL	N.A.	20.8%	N.A.	29.2%	N.A.	4.2%	N.A.	12.5%	N.A.	33.3%

Timor-Leste: 8 respondents who chose the “Little Confidence” and “No Confidence” options in Q40

JAPAN

Japan remains the most trusted major power in the region, with an ASEAN-10 overall trust level of 66.8%, up from 58.9% in 2024. Across the board and without exception, levels of trust in Japan outstripped levels of distrust. Japan is notably most trusted in the Philippines (83.0%), Cambodia (73.8%), Brunei (71.8%), and Vietnam (68.3%). The largest improvement in trust towards Japan is found in Laos, with an increase of 26.9% compared to 2024.

Japan also saw its levels of distrust decrease slightly by 3.3% this year to 16.5%. The highest level of distrust towards Japan is from Singapore (28.9%), Indonesia (26.6%), and Malaysia (22.9%).

Among those who trust Japan, 40.5% of ASEAN-10 respondents (up from 36.5% in 2024) believe that Japan is a responsible stakeholder that respects and champions international law. This perception is widely shared by respondents from Singapore (60.0%), Vietnam (52.8%), Myanmar (41.4%), and Brunei (41.1%). Nearly a fifth of this group (19.2%) believes that Japan has vast economic resources and the political will to provide global leadership.

Among those who distrust Japan, more than a third (34.6%) feel that Japan is distracted by its internal affairs and relations with Northeast Asian neighbours, preventing it from focusing on global concerns. This view is especially common among respondents from the Philippines and Myanmar (both at 50.0%), and Singapore (45.7%). Additionally, 28.4% of this group believe that Japan lacks the capacity or political will for global leadership, with this perception most pronounced among respondents from Vietnam (55.0%).

Timor-Leste's trust and distrust levels in Japan largely mirrors the rest of ASEAN. Unlike the ASEAN-10 who trust in Japan because of its role as an international law champion, more Timor-Leste respondents tend to see Japan's economic resources and political will (34.1%) and admiration for Japanese civilisation and culture (31.7%) as important factors for trust. Those from Timor-Leste who distrust Japan tend to point to its lack of capacity for political will for global leadership (33.3%) over concerns of Japan being distracted in Northeast Asia (16.7%).



Q41 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	
	2024	2025	2024	2025	2024	2025	2024	2025	2024	2025
ASEAN-10	3.3%	2.6%	16.5%	13.9%	21.3%	16.7%	44.9%	51.8%	14.0%	15.0%
BN	1.3%	1.3%	20.8%	4.7%	26.0%	22.1%	33.8%	53.7%	18.2%	18.1%
KH	5.8%	1.7%	19.0%	10.5%	13.2%	14.0%	43.9%	53.5%	18.0%	20.3%
ID	2.6%	4.8%	26.0%	21.8%	13.2%	11.9%	50.6%	54.8%	7.5%	6.7%
LA	8.1%	4.6%	8.1%	6.6%	42.5%	20.5%	36.9%	48.3%	4.4%	19.9%
MY	3.6%	3.3%	22.7%	19.6%	22.2%	19.6%	42.2%	48.3%	9.3%	9.2%
MM	2.1%	3.1%	25.4%	15.5%	22.8%	15.5%	36.0%	50.0%	13.8%	16.0%
PH	0.9%	0.0%	8.8%	11.7%	7.9%	5.3%	52.1%	61.2%	30.2%	21.8%
SG	4.8%	2.9%	16.1%	26.0%	24.9%	19.4%	45.4%	43.4%	8.8%	8.3%
TH	2.0%	0.5%	11.4%	12.8%	21.4%	20.4%	53.2%	51.0%	11.9%	15.3%
VN	2.0%	3.2%	7.0%	9.7%	19.0%	18.7%	54.5%	53.5%	17.5%	14.8%
TL	N.A.	0.0%	N.A.	9.1%	N.A.	28.8%	N.A.	50.0%	N.A.	12.1%

Q41A Why do you trust Japan?

1290 respondents excluding Timor-Leste respondents who chose the “Confident” and “Very Confident” options in Q41

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	
	2024	2025	2024	2025	2024	2025	2024	2025	2024	2025
ASEAN-10	21.1%	18.8%	27.7%	19.2%	36.5%	40.5%	5.8%	10.5%	8.9%	11.0%
BN	35.0%	18.7%	25.0%	10.3%	35.0%	41.1%	2.5%	16.8%	2.5%	13.1%
KH	19.7%	10.2%	42.7%	20.5%	28.2%	36.2%	1.7%	20.5%	7.7%	12.6%
ID	12.3%	15.5%	33.1%	33.5%	35.1%	36.8%	8.4%	5.2%	11.0%	9.0%
LA	12.1%	21.4%	42.4%	7.8%	27.3%	29.1%	7.6%	19.4%	10.6%	22.3%
MY	25.9%	26.1%	23.3%	25.4%	38.8%	38.4%	4.3%	5.1%	7.8%	5.1%
MM	29.8%	25.8%	18.1%	11.7%	40.4%	41.4%	3.2%	13.3%	8.5%	7.8%
PH	20.3%	16.4%	33.9%	33.3%	33.3%	34.5%	8.5%	7.0%	4.0%	8.8%
SG	14.9%	13.6%	10.1%	12.8%	57.4%	60.0%	4.7%	4.8%	12.8%	8.8%
TH	25.2%	17.7%	19.1%	23.8%	29.0%	34.6%	8.4%	6.2%	18.3%	17.7%
VN	16.0%	22.6%	29.2%	13.2%	40.3%	52.8%	9.0%	6.6%	5.6%	4.7%
TL	N.A.	31.7%	N.A.	34.1%	N.A.	24.4%	N.A.	2.4%	N.A.	7.3%

Timor-Leste: 41 respondents who chose the “Confident” and “Very Confident” options in Q41

Q41B Why do you distrust Japan?

345 respondents excluding Timor-Leste who chose the “Little Confidence” and “No Confidence” options in Q41

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	
	2024	2025	2024	2025	2024	2025	2024	2025	2024	2025
ASEAN-10	35.1%	34.6%	33.2%	28.4%	7.9%	7.1%	13.8%	12.9%	10.0%	17.1%
BN	47.1%	11.1%	29.4%	22.2%	5.9%	0.0%	11.8%	44.4%	5.9%	22.2%
KH	21.3%	33.3%	27.7%	23.8%	14.9%	9.5%	17.0%	9.5%	19.1%	23.8%
ID	32.9%	43.3%	32.9%	26.9%	10.5%	7.5%	10.5%	9.0%	13.2%	13.4%
LA	30.8%	11.8%	34.6%	23.5%	3.8%	5.9%	15.4%	11.8%	15.4%	47.1%
MY	37.3%	38.2%	32.2%	32.7%	6.8%	5.5%	8.5%	10.9%	15.3%	12.7%
MM	34.6%	50.0%	40.4%	19.4%	1.9%	5.6%	15.4%	11.1%	7.7%	13.9%
PH	38.1%	50.0%	9.5%	16.7%	9.5%	20.8%	42.9%	4.2%	0.0%	8.3%
SG	38.6%	45.7%	42.1%	32.9%	7.0%	4.3%	1.8%	5.7%	10.5%	11.4%
TH	48.1%	42.3%	33.3%	30.8%	7.4%	11.5%	3.7%	7.7%	7.4%	7.7%
VN	22.2%	20.0%	50.0%	55.0%	11.1%	0.0%	11.1%	15.0%	5.6%	10.0%
TL	N.A.	16.7%	N.A.	33.3%	N.A.	16.7%	N.A.	16.7%	N.A.	16.7%

Timor-Leste: 6 respondents who chose the “Little Confidence” and “No Confidence” options in Q41

THE UNITED STATES

The levels of trust in the US remain strong, with a notable increase from 42.4% in 2024 to 47.2% this year for ASEAN-10 respondents. Similarly, the levels of distrust saw a noticeable decrease, from 37.6% in 2024 to 33.0% this year.

Confidence in the US is widespread among respondents from the Philippines (66.5%), Laos (60.9%), Vietnam (60.6%), Cambodia (58.8%), and Myanmar (54.6%). The most significant gains in trust towards the US are seen in Laos, where trust increased by more than 30% this year. Meanwhile, Indonesia (58.3%), Malaysia (56.3%), and Singapore (47.2%) are the only countries where distrust levels exceed trust.

Among those who trust the US, 38.5% believe that the US has vast economic resources and the political will to provide global leadership, although the rate dropped noticeably from 45.0% last year. This perception is most pronounced in Indonesia (58.7%), Vietnam (56.4%), and Thailand (46.0%). Of those who distrust the US, about a third (34.0%) think that the US is distracted with its internal affairs and thus cannot focus on global concerns and issues.

Timor-Leste's trust in the US is higher than ASEAN-10 at 51.5% (versus 47.2%) and its distrust levels lower than the ASEAN-10 average at 15.2%. The top reasons for trust and distrust in the US among Timor-Leste respondents are the same as for ASEAN-10.



Q42 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	
	2024	2025	2024	2025	2024	2025	2024	2025	2024	2025
ASEAN-10	14.1%	10.1%	23.5%	22.9%	20.0%	19.8%	32.0%	35.4%	10.4%	11.8%
BN	32.5%	10.1%	28.6%	14.1%	22.1%	22.1%	11.7%	36.9%	5.2%	16.8%
KH	7.4%	4.7%	21.7%	20.9%	14.3%	15.7%	47.1%	44.8%	9.5%	14.0%
ID	34.3%	26.2%	27.9%	32.1%	14.0%	16.7%	19.2%	20.6%	4.5%	4.4%
LA	13.1%	7.3%	20.0%	15.9%	37.5%	15.9%	23.8%	40.4%	5.6%	20.5%
MY	20.9%	21.3%	36.0%	35.0%	20.0%	20.4%	20.0%	20.4%	3.1%	2.9%
MM	5.3%	6.7%	23.8%	19.6%	21.7%	19.1%	34.9%	43.3%	14.3%	11.3%
PH	2.3%	2.4%	14.4%	18.0%	9.3%	13.1%	49.8%	51.5%	24.2%	15.0%
SG	13.6%	11.2%	27.8%	36.0%	20.5%	28.9%	31.1%	21.5%	7.0%	2.5%
TH	8.5%	8.2%	23.9%	25.0%	20.9%	22.4%	34.3%	34.2%	12.4%	10.2%
VN	3.5%	3.2%	10.5%	12.9%	19.5%	23.2%	48.5%	40.0%	18.0%	20.6%
TL	N.A.	6.1%	N.A.	9.1%	N.A.	33.3%	N.A.	47.0%	N.A.	4.5%

Q42A Why do you trust the US?

874 respondents excluding Timor-Leste who chose the “Confident” and “Very Confident” options in Q42

Country	I respect the US and admire its civilisation and culture		My country's political culture and worldview are compatible with the US'		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' military power is an asset for global peace and security	
	2024	2025	2024	2025	2024	2025	2024	2025	2024	2025
ASEAN-10	6.1%	6.3%	6.4%	9.1%	45.0%	38.5%	14.4%	17.8%	28.0%	28.2%
BN	7.7%	11.3%	15.4%	6.3%	38.5%	20.0%	7.7%	22.5%	30.8%	40.0%
KH	11.2%	7.9%	2.8%	11.9%	46.7%	33.7%	20.6%	20.8%	18.7%	25.7%
ID	3.2%	1.6%	7.9%	3.2%	41.3%	58.7%	20.6%	27.0%	27.0%	9.5%
LA	4.3%	7.6%	6.4%	8.7%	59.6%	26.1%	4.3%	21.7%	25.5%	35.9%
MY	7.7%	3.6%	7.7%	12.5%	50.0%	42.9%	7.7%	12.5%	26.9%	28.6%
MM	9.7%	14.2%	4.3%	7.5%	38.7%	29.2%	25.8%	19.8%	21.5%	29.2%
PH	6.3%	5.1%	8.8%	12.4%	42.8%	34.3%	15.1%	16.8%	27.0%	31.4%
SG	5.8%	3.4%	6.7%	13.8%	31.7%	37.9%	16.3%	13.8%	39.4%	31.0%
TH	1.1%	1.1%	2.1%	13.8%	50.0%	46.0%	12.8%	12.6%	34.0%	26.4%
VN	3.8%	7.4%	2.3%	1.1%	51.1%	56.4%	13.5%	10.6%	29.3%	24.5%
TL	N.A.	5.9%	N.A.	2.9%	N.A.	61.8%	N.A.	14.7%	N.A.	14.7%

Timor-Leste: 34 respondents who chose the “Confident” and “Very Confident” options in Q42

Q42B Why do you distrust the US?

694 respondents excluding Timor-Leste who chose the “Little Confidence” and “No Confidence” options in Q42

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'		The US does not have the capacity or political will for global leadership		The US' economic and military power could be used to threaten my country's interests and sovereignty		I do not consider the US a responsible or reliable power	
	2024	2025	2024	2025	2024	2025	2024	2025	2024	2025
ASEAN-10	27.0%	34.0%	13.2%	8.8%	9.6%	4.9%	25.6%	26.6%	24.6%	25.7%
BN	21.3%	19.4%	19.1%	2.8%	6.4%	2.8%	19.1%	30.6%	34.0%	44.4%
KH	25.5%	27.3%	14.5%	15.9%	16.4%	6.8%	27.3%	34.1%	16.4%	15.9%
ID	14.5%	23.1%	13.9%	12.9%	7.3%	2.7%	41.2%	35.4%	23.0%	25.9%
LA	24.5%	31.4%	15.1%	5.7%	17.0%	2.9%	24.5%	37.1%	18.9%	22.9%
MY	23.4%	18.5%	11.7%	7.4%	7.0%	7.4%	29.7%	34.1%	28.1%	32.6%
MM	16.4%	45.1%	32.7%	17.6%	16.4%	9.8%	21.8%	9.8%	12.7%	17.6%
PH	30.6%	57.1%	8.3%	0.0%	5.6%	2.4%	30.6%	28.6%	25.0%	11.9%
SG	46.9%	48.2%	2.7%	5.3%	8.0%	11.4%	13.3%	11.4%	29.2%	23.7%
TH	41.5%	41.5%	3.1%	4.6%	1.5%	3.1%	30.8%	24.6%	23.1%	26.2%
VN	25.0%	28.0%	10.7%	16.0%	10.7%	0.0%	17.9%	20.0%	35.7%	36.0%
TL	N.A.	60.0%	N.A.	0.0%	N.A.	20.0%	N.A.	10.0%	N.A.	10.0%

Timor-Leste: 10 respondents who chose the “Little Confidence” and “No Confidence” options in Q42

TRUST AND DISTRUST RANKINGS OF MAJOR POWERS IN THE REGION

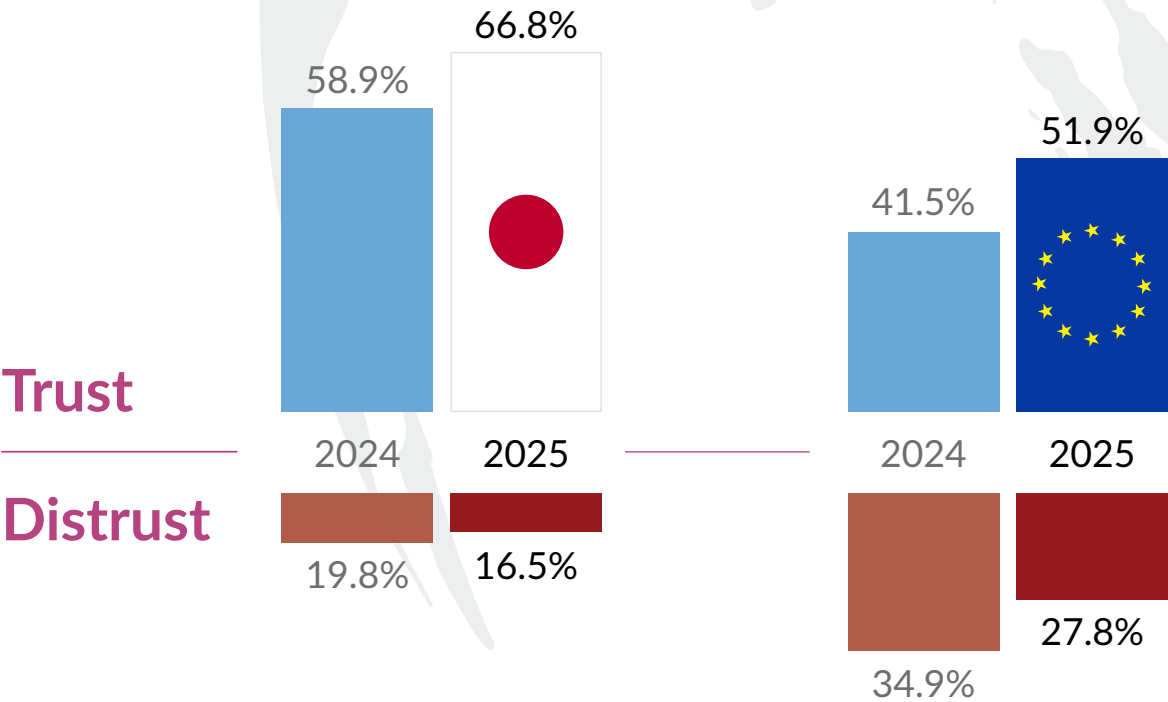
The “trust” and “distrust” rankings of five countries that can exert influence on Southeast Asia are based on a consolidated five-point Likert scale of positive and negative responses (“Very Confident” to “No Confidence”). The “No Comment” responses are removed from this analysis. Timor-Leste’s results are not included in this analysis.

Japan (66.8%) has maintained its position as the most trusted major power in Southeast Asia, followed by the EU (51.9%), the US (47.2%), China (36.6%), and India (35.3%). Japan’s respectful and cooperative approach to regional engagement remains well received, despite domestic political shifts with the appointment of Prime Minister Shigeru Ishiba in October 2024, which has raised expectations of a potential foreign policy recalibration from Tokyo, but this also demonstrates that regardless of Japan’s domestic politics, the region’s trust remains steadfast. The largest proportion of respondents (40.5%) continue to view Japan as a responsible stakeholder that respects and upholds international law, a perception widely shared in Singapore, Vietnam, Myanmar, and Brunei.

The EU has seen a significant rise in trust, increasing from 41.5% in 2024 to 51.9% in 2025, while distrust levels have dropped from 34.9% to 27.8%. However, scepticism towards the EU remain strong in Indonesia and Malaysia

– two countries with longstanding tensions with Brussels over palm oil, which is widely viewed as a discriminatory policy that harms small farmers. Paradoxically, the EU’s strong stance on environmental protection, human rights, and climate change remains a key reason for its favourable perception. At the same time, scepticism about EU leadership persists, particularly in the Philippines, Singapore, and Thailand, where respondents express concerns that the EU is overly preoccupied with its internal affairs and unable to effectively exercise leadership on global issues.

Trust in the US has also increased, rising from 42.4% to 47.2%, while distrust levels have fallen from 37.6% to 33.0%, despite the re-election of President Donald Trump, whose America First policy is perceived as nationalistic and undermining of the multilateral system. The most notable gain in trust is observed in Laos, where confidence in the US surged by over 30%.



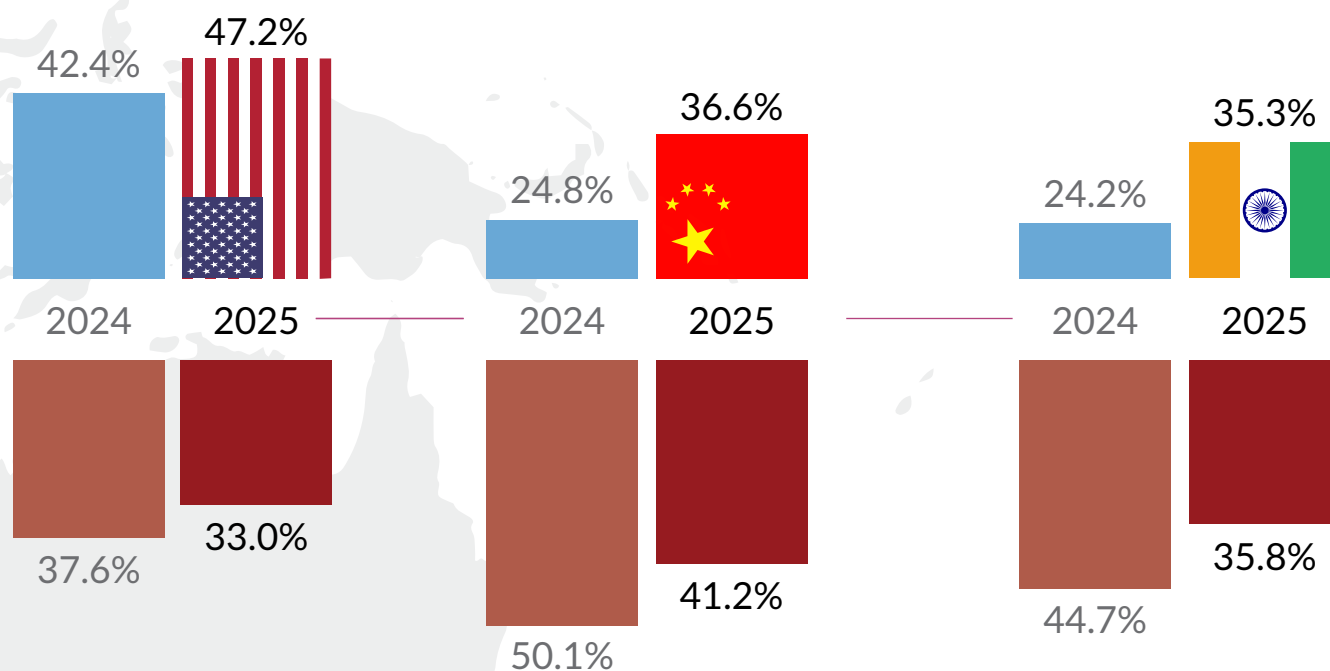
On the other hand, Indonesia (58.3%), Malaysia (56.3%), and Singapore (47.2%) are the only ASEAN countries where distrust in the US exceeds trust. Those optimistic about US leadership believe that the US has vast economic resources and the political will for global leadership. Conversely, those who remain sceptical argue that internal distractions hinder its ability to focus on global issues.

China has experienced the largest increase in trust levels compared to other major powers, rising from 24.8% in 2024 to 36.6% this year. This suggests an improvement in regional perceptions of China, though scepticism remains high. Concerns persist regarding China's economic and military assertiveness, particularly among the direct claimants in the South China Sea, such as the Philippines and Vietnam, which have witnessed intensifying conflicts. However, those who view China favourably attribute this to its vast economic resources and strong political will to provide global leadership.

India has also seen a significant improvement in trust levels, rising from 24.2% in 2024 to 35.3% in 2025. Distrust levels have fallen from 44.7% to 35.8%, narrowing the gap between confidence and scepticism. This shift indicates growing recognition of India's potential role in providing regional stability.

However, doubts persist regarding its ability to project political will and leadership beyond its domestic and subcontinental affairs. The perception that India lacks the capacity or political will for global leadership remains particularly strong in Cambodia (53.7%), Laos (44.1%), Thailand (42.9%), and Indonesia (41.6%).

The shifting trust dynamics among major powers from a Southeast Asian perspective reflects the complexities of geopolitical developments and leadership changes around the world. All major powers saw an increase in trust levels. Japan maintains its position as the most trusted, followed by the EU, which has overtaken the US for second place this year. Japan's consistent global leadership successfully garners trust in ASEAN, while both the EU and the US must navigate the delicate balance between internal challenges and external expectations. China's rising trust owes much to its strong economic influence, while its assertive behaviour continues to provoke concern. Meanwhile, India's increasing trust highlights recognition of its potential role in ensuring regional stability, possibly because of its ability to canvass the Global South, though scepticism about its global leadership remains. These evolving perceptions offer valuable insights for the region as it navigates increasingly complex geopolitical challenges.



SECTION VI

Soft Power 70-74

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

MOST PREFERRED COUNTRY TO LIVE OR WORK IN

The ASEAN-10's top three choices remain unchanged from 2024. More than a fifth of respondents prefer living and working in an ASEAN country (20.5%) if given an opportunity to relocate. This choice is particularly strong among those from Malaysia (28.3%), Singapore (27.3%), Indonesia (27.0%), Brunei (24.2%), and Myanmar (17.5%).

The second most favoured location is Japan (17.6%), which is the preferred country for respondents from the Philippines (29.1%) and Thailand (23.5%),

In third place is the US (14.8%), which is the top choice for Vietnam (29.0%), Cambodia (26.7%) and Laos (22.5%) respondents.

For Timor-Leste, the largest proportion of respondents (40.9%) prefer to live or work in Australia if given the opportunity to relocate. This is followed by an ASEAN member state (28.8%) in second and an EU member state (15.2%) in third place.



Q43 If I had a choice, I would like to live or work in this country:

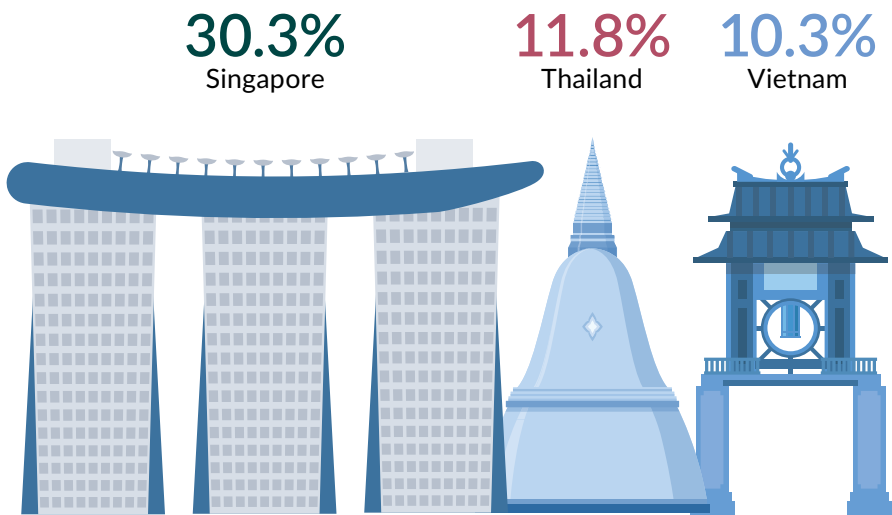
Country	An ASEAN member state	An EU member state	Australia	China	India	Japan	New Zealand	Republic of Korea	The United Kingdom	The United States
ASEAN-10	20.5%	9.9%	12.2%	5.5%	1.6%	17.6%	10.1%	3.1%	4.7%	14.8%
BN	24.2%	10.1%	10.1%	8.1%	4.0%	14.8%	6.7%	6.7%	7.4%	8.1%
KH	15.1%	11.0%	14.0%	3.5%	2.9%	14.5%	4.7%	4.7%	2.9%	26.7%
ID	27.0%	13.5%	13.1%	1.6%	0.0%	23.0%	11.9%	4.0%	2.4%	3.6%
LA	18.5%	8.6%	7.9%	11.3%	4.6%	11.9%	6.0%	4.0%	4.6%	22.5%
MY	28.3%	7.1%	13.8%	5.4%	0.0%	15.0%	17.1%	1.7%	8.3%	3.3%
MM	17.5%	12.4%	16.5%	9.3%	3.1%	11.9%	7.2%	2.1%	5.7%	14.4%
PH	9.2%	5.8%	10.7%	1.5%	0.0%	29.1%	19.4%	2.9%	4.9%	16.5%
SG	27.3%	7.4%	12.4%	6.2%	1.2%	15.3%	13.6%	2.1%	5.4%	9.1%
TH	17.9%	11.2%	6.6%	6.1%	0.5%	23.5%	11.7%	2.6%	5.6%	14.3%
VN	20.0%	12.3%	16.8%	1.9%	0.0%	16.8%	2.6%	0.6%	0.0%	29.0%
TL	28.8%	15.2%	40.9%	1.5%	0.0%	3.0%	6.1%	0.0%	3.0%	1.5%

Q43A Please select the ASEAN country you would like to live or work in.

Among the ASEAN-10 respondents who selected an ASEAN member state as their preferred relocation choice, Singapore emerged as the top choice (30.3%), followed by Thailand (11.8%) and Vietnam (10.3%).

Similar to the trend in 2024, most respondents prefer to stay in their own country, except for those from the Philippines, who favour Singapore (47.4%).

Interestingly, in Timor-Leste, the preference is equally split between those who prefer to live or work in their own country and those who choose Singapore, each at 36.8%.



411 respondents excluding Timor-Leste who chose the “An ASEAN member state” option in Q43

Country	BN	KH	ID	LA	MY	MM	PH	SG	TH	TL	VN
ASEAN-10	9.5%	4.4%	8.4%	5.8%	9.1%	5.2%	5.2%	30.3%	11.8%	0.0%	10.3%
BN	69.4%	0.0%	2.8%	8.3%	11.1%	0.0%	0.0%	5.6%	0.0%	0.0%	2.8%
KH	7.7%	42.3%	0.0%	0.0%	0.0%	0.0%	0.0%	34.6%	3.8%	0.0%	11.5%
ID	7.4%	1.5%	45.6%	0.0%	2.9%	0.0%	0.0%	29.4%	7.4%	0.0%	5.9%
LA	0.0%	0.0%	3.6%	50.0%	3.6%	0.0%	3.6%	35.7%	3.6%	0.0%	0.0%
MY	4.4%	0.0%	10.3%	0.0%	55.9%	0.0%	0.0%	20.6%	5.9%	0.0%	2.9%
MM	0.0%	0.0%	8.8%	0.0%	11.8%	50.0%	2.9%	14.7%	11.8%	0.0%	0.0%
PH	0.0%	0.0%	5.3%	0.0%	0.0%	0.0%	42.1%	47.4%	5.3%	0.0%	0.0%
SG	0.0%	0.0%	4.5%	0.0%	6.1%	1.5%	3.0%	72.7%	6.1%	0.0%	6.1%
TH	5.7%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	22.9%	71.4%	0.0%	0.0%
VN	0.0%	0.0%	3.2%	0.0%	0.0%	0.0%	0.0%	19.4%	3.2%	0.0%	74.2%
TL	0.0%	5.3%	0.0%	0.0%	5.3%	0.0%	0.0%	36.8%	15.8%	36.8%	0.0%

Timor-Leste: 19 respondents who chose “An ASEAN member state” option in Q43

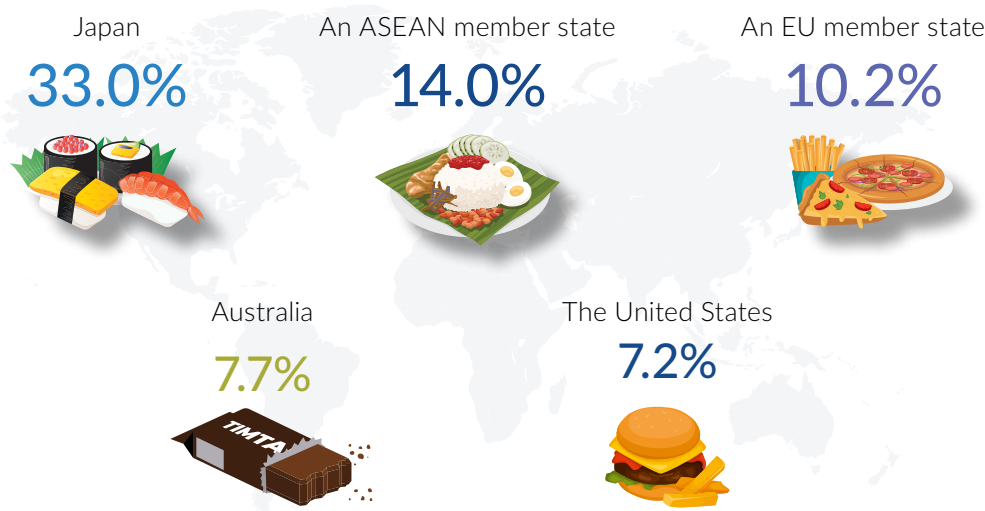
MOST PREFERRED COUNTRY TO VISIT

Japan (33.0%) remains the most popular travel destination among the ASEAN-10 respondents, following the same trend in 2024. It is the top travel choice for almost all ASEAN-10 countries, except for respondents from Myanmar, where an EU member state is the preferred destination.

A significant number of respondents also prefer to travel to an ASEAN member state (14.0%). Notably, an EU member state (10.2%) has become the third most

preferred destination, replacing the Republic of Korea, which held the position in 2024.

Timor-Leste respondents prefer to travel within the region, with the largest proportion (47.0%) of respondents choosing an ASEAN member state as the most favoured holiday destination. This is followed by an EU member state (16.7%) and New Zealand (10.6%).



Q44 Which country is your favourite holiday destination?

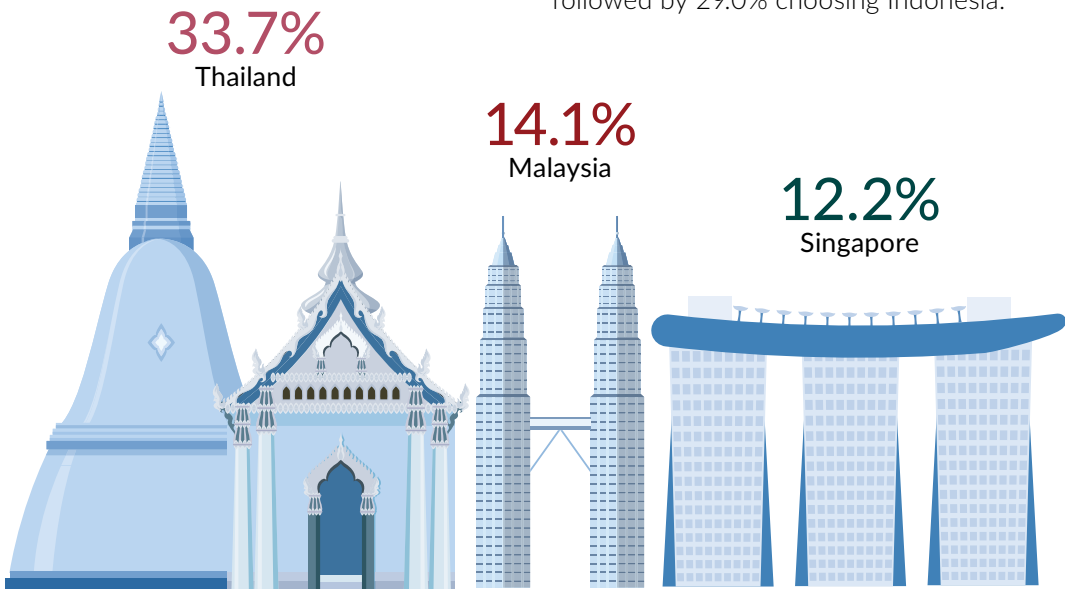
Country	An ASEAN member state	An EU member state	Australia	China	India	Japan	New Zealand	Republic of Korea	The United Kingdom	The United States
ASEAN-10	14.0%	10.2%	7.7%	6.7%	3.0%	33.0%	6.9%	6.7%	4.6%	7.2%
BN	16.8%	6.0%	12.1%	8.7%	6.0%	23.5%	2.0%	8.7%	8.1%	8.1%
KH	12.2%	13.4%	7.6%	4.7%	6.4%	22.1%	5.2%	5.8%	5.8%	16.9%
ID	21.8%	15.5%	2.4%	3.6%	0.0%	36.5%	6.7%	8.7%	2.8%	2.0%
LA	11.3%	7.3%	7.9%	8.6%	5.3%	25.8%	6.6%	6.6%	4.6%	15.9%
MY	23.3%	7.1%	10.8%	7.1%	2.5%	24.6%	12.1%	4.2%	6.7%	1.7%
MM	13.4%	15.5%	10.8%	9.3%	5.7%	12.4%	13.4%	7.2%	5.7%	6.7%
PH	11.2%	11.2%	0.5%	2.9%	0.0%	47.6%	6.3%	5.8%	6.8%	7.8%
SG	12.0%	7.9%	9.5%	7.9%	1.2%	43.0%	7.4%	6.6%	2.5%	2.1%
TH	7.7%	6.6%	4.6%	5.6%	2.0%	55.6%	6.6%	4.6%	3.6%	3.1%
VN	10.3%	11.6%	10.3%	8.4%	0.6%	39.4%	2.6%	9.0%	0.0%	7.7%
TL	47.0%	16.7%	7.6%	0.0%	1.5%	6.1%	10.6%	7.6%	0.0%	3.0%

Q44A Please select your favourite ASEAN country for a holiday destination.

Among the ASEAN-10 respondents who chose an ASEAN member state as their preferred holiday destination, Thailand is the top choice with 33.7% of votes, similar to the trend in 2024. Thailand is the top travel destination among respondents from four ASEAN countries: Myanmar, Malaysia, Cambodia, and Thailand itself. For Laos, the top option is a tie between Singapore and Thailand, both at 35.3%.

Malaysia comes in second at 14.1% and is the preferred destination for respondents from Brunei and Singapore. Singapore is in third place at 12.2% and is the second choice for Cambodia respondents. Meanwhile, respondents from Indonesia and Vietnam prefer to travel within their own countries.

For Timor-Leste, the largest proportion of respondents (41.9%) choose Thailand as their top holiday destination, followed by 29.0% choosing Indonesia.



283 respondents excluding Timor-Leste who chose the “An ASEAN member state” option in Q44

Country	BN	KH	ID	LA	MY	MM	PH	SG	TH	TL	VN
ASEAN-10	1.6%	1.9%	12.1%	3.2%	14.1%	1.4%	8.5%	12.2%	33.7%	1.0%	10.3%
BN	12.0%	0.0%	16.0%	0.0%	44.0%	0.0%	0.0%	12.0%	12.0%	0.0%	4.0%
KH	0.0%	19.0%	0.0%	0.0%	4.8%	0.0%	0.0%	23.8%	33.3%	0.0%	19.0%
ID	3.6%	0.0%	47.3%	0.0%	18.2%	0.0%	0.0%	14.5%	14.5%	0.0%	1.8%
LA	0.0%	0.0%	0.0%	11.8%	0.0%	0.0%	5.9%	35.3%	35.3%	0.0%	11.8%
MY	0.0%	0.0%	25.0%	0.0%	23.2%	0.0%	0.0%	5.4%	44.6%	0.0%	1.8%
MM	0.0%	0.0%	7.7%	0.0%	7.7%	7.7%	3.8%	7.7%	57.7%	3.8%	3.8%
PH	0.0%	0.0%	4.3%	0.0%	8.7%	0.0%	65.2%	4.3%	17.4%	0.0%	0.0%
SG	0.0%	0.0%	13.8%	0.0%	34.5%	0.0%	10.3%	0.0%	31.0%	0.0%	10.3%
TH	0.0%	0.0%	6.7%	20.0%	0.0%	6.7%	0.0%	6.7%	60.0%	0.0%	0.0%
VN	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	12.5%	31.3%	6.3%	50.0%
TL	0.0%	0.0%	29.0%	3.2%	3.2%	0.0%	3.2%	12.9%	41.9%	3.2%	3.2%

Timor-Leste: 31 respondents who chose the “ASEAN member state” option in Q44

APPRECIATION

We would like to extend our thanks to our ISEAS fellows who helped craft, curate, and refine earlier drafts of the survey.

We wish to extend our sincere appreciation to the 2,023 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.

We would also 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.

Last but not least, we are 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 by scanning the QR code below.

You may email any comments and questions about the survey to asc@iseas.edu.sg



