



The State of
Southeast Asia
2026 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), as well as six Country Study Programmes. 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.

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ABOUT THE SURVEY

The State of Southeast Asia survey, now in its eighth 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 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 5 January 2026 to 20 February 2026.

The survey was offered in seven languages – English, Bahasa Indonesia, Burmese, Khmer, Thai, Vietnamese, and Tetum for the first time this year. A total of 2,008 respondents from all ASEAN member states took part in the survey.

There are six sections in the survey. **Section I** covers the profile of the respondents by nationality, education, affiliation, age, and top news source. **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** dives into ASEAN's options in the changing regional political-security architecture. **Section V** measures Southeast Asians' trust perceptions towards five countries – China, the EU, India, Japan, and the US. **Section VI** gauges levels of soft power in the region based on relocation and travel 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. The eligibility criteria continues to be applied 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 **43** questions in total, which took approximately 20 to 35 minutes to complete. It was conducted fully online using a mixed purposive sampling method.

A total of **2,008** 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, NGO, or media representatives; (d) government officials; and (e) regional or international organisations personnel.

To reflect its official membership to ASEAN as of October 2025, Timor-Leste's responses are included in the regional aggregated averages for the first time this year. An equal weightage was applied to all ASEAN member states' responses to calculate the average figures for ASEAN as a whole. This ensures that each country's responses are represented in equal proportion given that ASEAN's decision-making processes are based on each member state having equal say, regardless of geographical or population size.

From 2019 – 2025, the regional aggregated averages reflected only ASEAN-10 responses. From 2026 onwards, responses from Timor-Leste are included in the calculation of the weighted regional average.

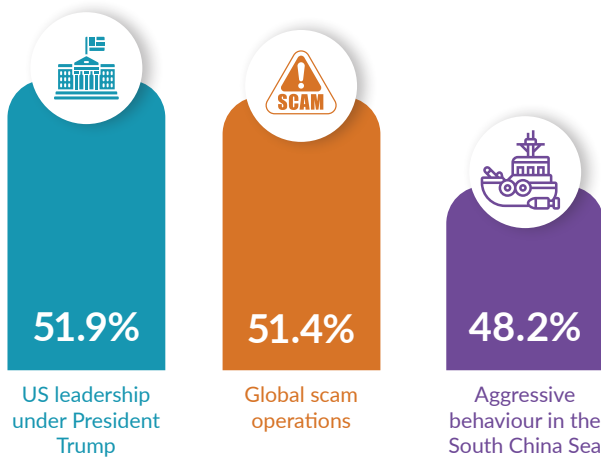
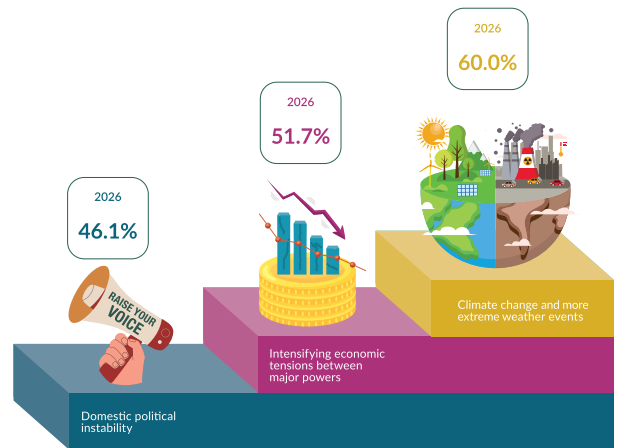
Final analyses of regional sentiments were conducted on the weighted data set. A strict set of criteria was applied to remove duplicates, speeders, and straightliners to maintain data quality and integrity.

Regional weighted averages indicate the salience of an issue at the ASEAN level, but should be read alongside country-level variation, which may reveal differing intensities of concern across member states.

Note: No weighting was applied to respondent profile questions (Questions 1 to 6). 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.

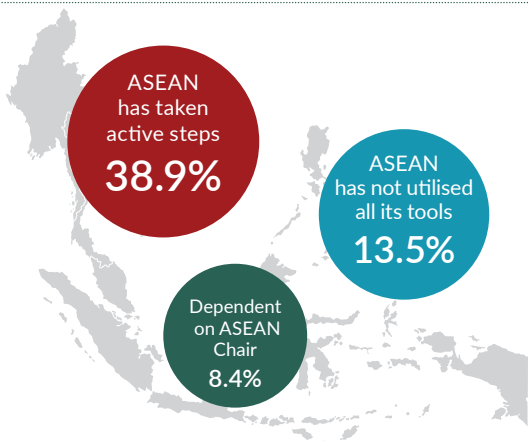
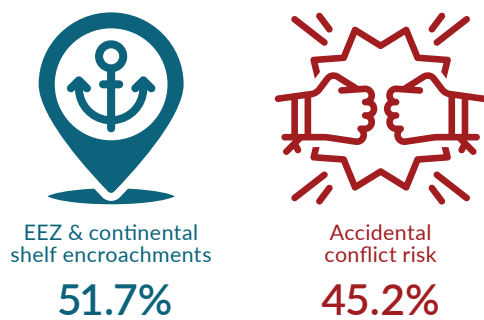
SURVEY HIGHLIGHTS

1 Climate change and extreme weather events (60.0%) remains Southeast Asia's top challenge this year, signalling heightened public awareness of its economic, social, and environmental repercussions. Other top concerns include intensifying economic tensions between major powers (51.7%) and domestic political instability (46.1%), reflecting ongoing challenges in the global economic and political environment. Deteriorating human rights conditions (7.4%) continue to rank last.



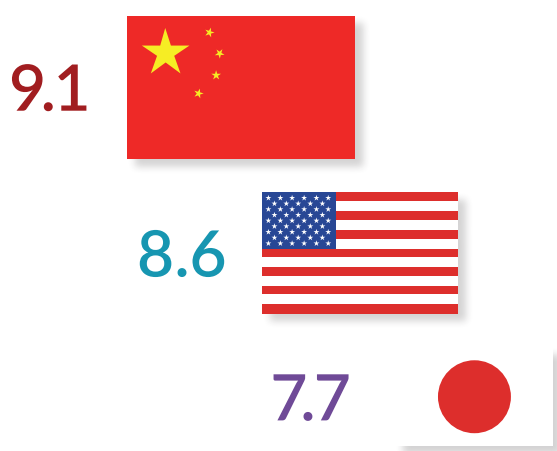
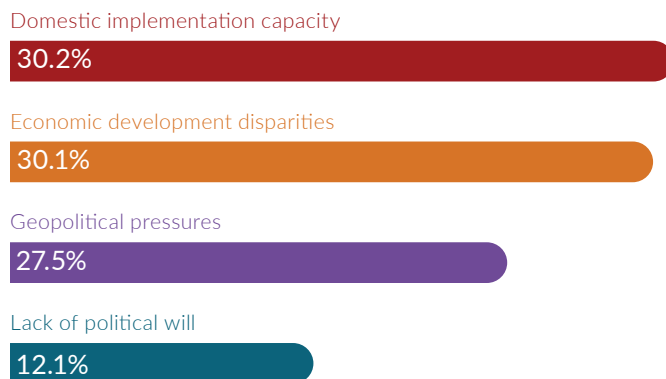
2 More than half of the survey respondents (51.9%) identify the US leadership under President Donald Trump as their top geopolitical concern, followed closely by concerns over global scam operations (51.4%), and aggressive behaviour in the South China Sea (48.2%). When asked how relations under the Trump 2.0 administration could be improved, respondents who foresee a deterioration in relations emphasise the need for Washington to respect international law and its institutions and not undermine the global system (38.5%).

3 China's encroachments in the Exclusive Economic Zones (EEZs) and continental shelves of Southeast Asia's littoral states (51.7%), along with the possibility of an accidental conflict between an ASEAN member state and China (45.2%), remain key concerns among regional respondents regarding the South China Sea. These concerns highlight the region's anxieties surrounding sovereignty, maritime rights, access to resources, and the consistent fear of miscalculation and escalation of tensions at sea.



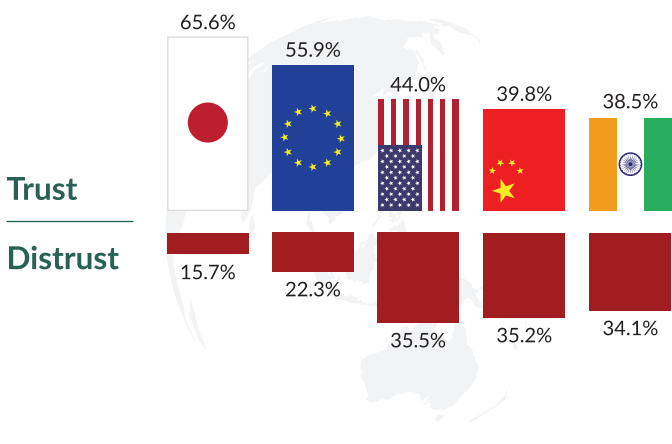
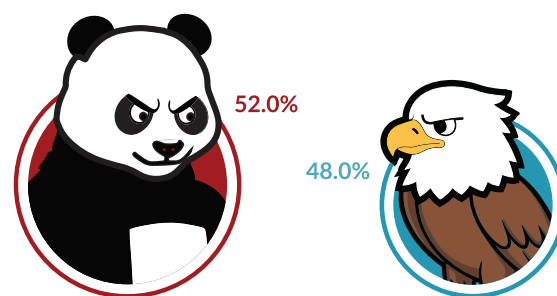
4 More than one-third of respondents (38.9%) agree that ASEAN has taken active steps to mediate the Cambodia-Thailand border crisis through ministerial statements and the deployment of diplomatic engagement at both formal and informal levels. Conversely, 13.5% of respondents feel that ASEAN has not used all the tools at its disposal to address the conflict and another 8.4% believe that the organisation's actions are too dependent on the ASEAN Chair, exposing the grouping's structural weaknesses.

5 When asked about impediments to deeper economic integration, most of the respondents point to domestic development constraints. 30.2% attribute these impediments to ASEAN member states' domestic technocratic implementation capacities, while 30.1% cite disparities in their economic development. Reflecting the current uncertain geopolitical environment, it is unsurprising that nearly one-third of the respondents (27.5%) identify geopolitical pressures affecting regional interests as a key impediment. By contrast, the lack of political will (12.1%) is viewed as the least significant hurdle.



6 China continues to retain its position as the most influential economic (55.9%) and political-strategic (40.0%) power in the region. Among ASEAN Dialogue Partners, China (mean score of 9.1 out of 11.0) also remains the undisputed partner of greatest strategic relevance, ranking first in most member states, followed by the US (8.6) and Japan (7.7). The wider gap in mean scores between China and the US suggests that Beijing's strategic relevance has strengthened relative to Washington's over the past year. Despite China's positive standing, regional concern over its growing economic and political-strategic influence continues to outweigh acceptance.

7 Reversing last year's trend, a slim majority of ASEAN respondents selected China (52.0%) over the US (48.0%) if the region were forced to align itself with one of the two strategic rivals. This shift back toward China highlights how finely balanced regional sentiment remains. To fend off pressure from the two major powers, more than half of the respondents (55.2%) continue to prioritise the importance of enhancing ASEAN's resilience and unity.



8 Japan remains the most trusted power in the region (65.6%), with a significant share of the respondents (41.4%) viewing it as a responsible stakeholder that respects and champions international law. The EU ranks a distant second (55.9%), followed by the US (44.0%), China (39.8%), and India (38.5%). Although China and India record lower overall standings, their trust levels narrowly exceed their distrust levels for the first time since the survey was conducted in 2019.

SECTION I

Respondents' Profile

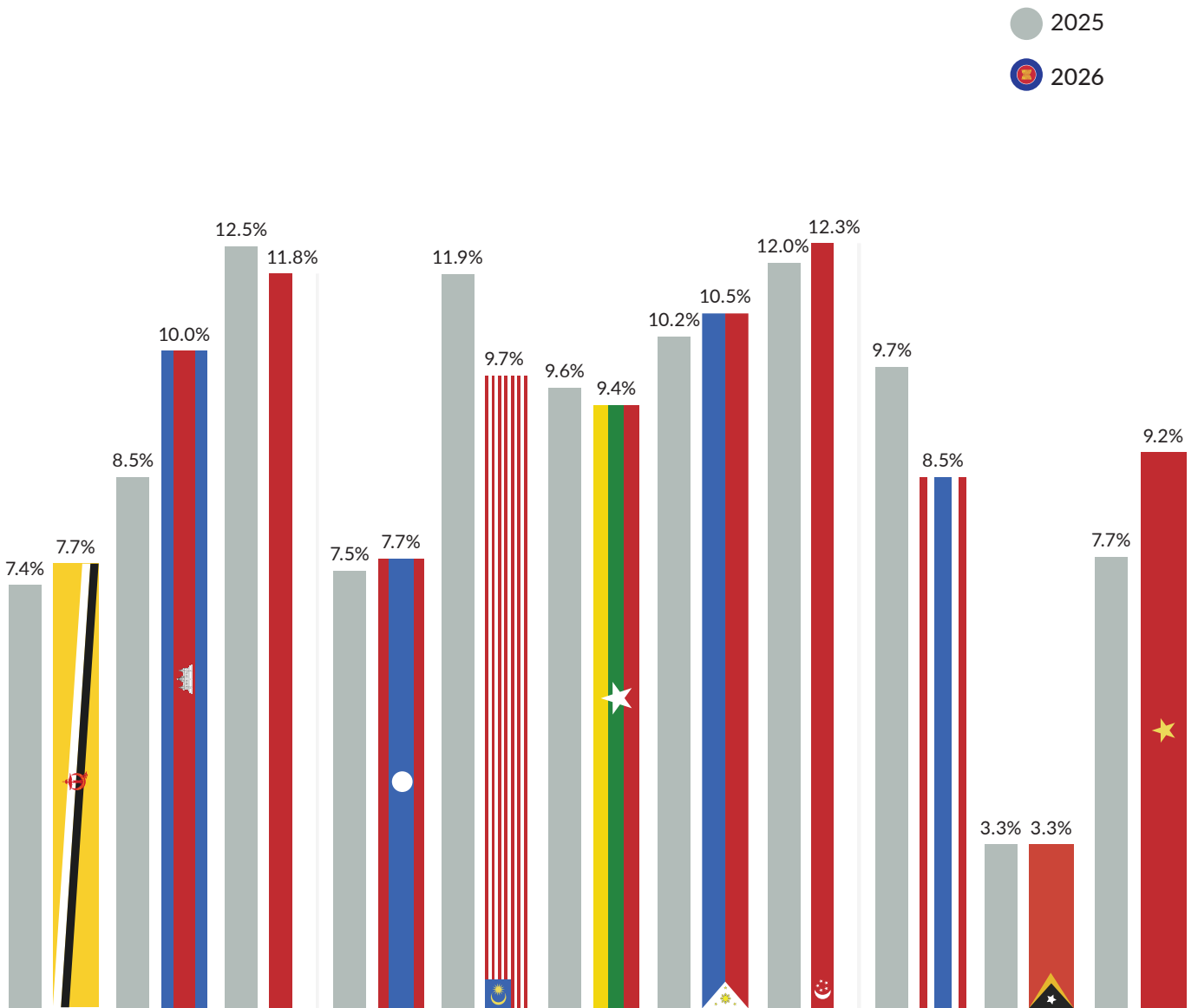
06 - 12

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

NATIONALITY

A total of 2,008 respondents from all ASEAN member states participated in this survey. Singapore leads with the highest number of respondents at 246 (12.3%), closely followed by Indonesia at 236 (11.8%) and the Philippines at 211 (10.5%). The breakdown for the rest of the countries is as follows: Cambodia (10.0%), Malaysia (9.7%), Vietnam (9.4%), Myanmar (9.2%), Thailand (8.5%), Laos and Brunei (both at 7.7%), and Timor-Leste (3.3%).

Q1 What is your nationality?

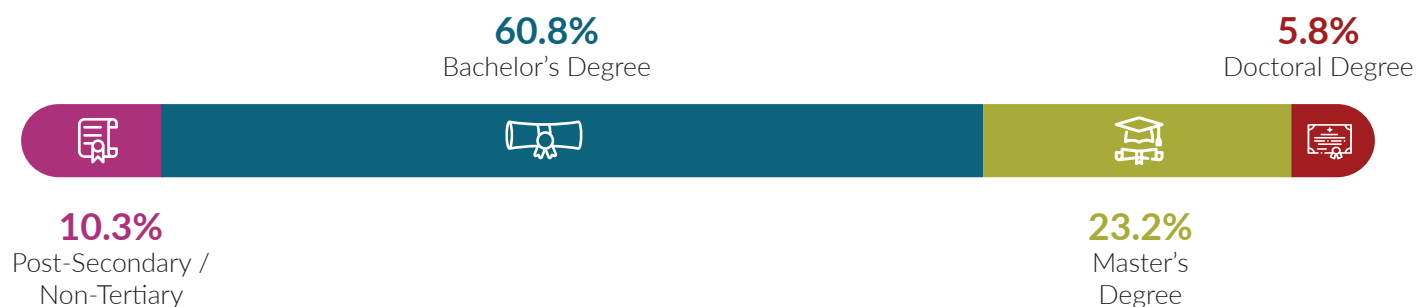


EDUCATION LEVEL

More than half of the respondents hold a Bachelor's degree (60.8%). The second largest group of respondents are those with a Master's degree (23.2%) followed by those with post-secondary / non-tertiary qualifications (10.3%). Those with a Doctoral degree (5.8%) make up the smallest group of respondents this year.

The country with the highest number of respondents with a Bachelor's degree is Vietnam (78.3%), while the country with the highest number of respondents with a Master's degree is Brunei (40.0%).

Singapore has the greatest number of respondents both with post-secondary / non-tertiary qualifications (19.9%) and Doctoral degrees (10.2%).



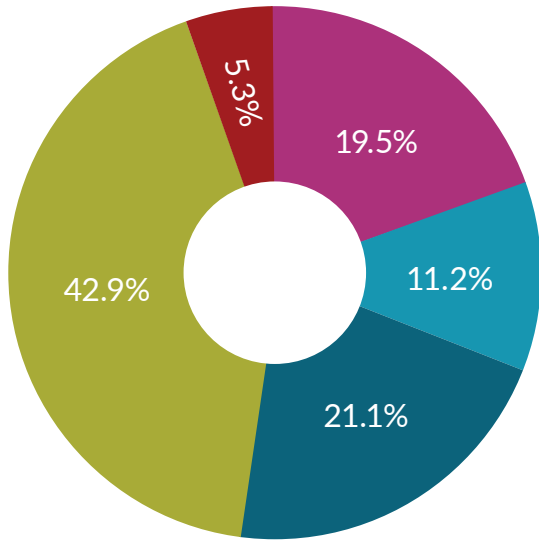
Q2 What is the highest education level that you have attained?

Country	Post-Secondary/ Non-Tertiary	Bachelor's Degree	Master's Degree	Doctoral Degree
ASEAN	10.3%	60.8%	23.2%	5.8%
BN	5.8%	48.4%	40.0%	5.8%
KH	3.5%	58.0%	35.0%	3.5%
ID	11.0%	68.2%	13.1%	7.6%
LA	4.5%	58.7%	34.2%	2.6%
MY	16.0%	56.7%	19.1%	8.2%
MM	5.8%	49.7%	38.1%	6.3%
PH	8.1%	73.5%	13.3%	5.2%
SG	19.9%	46.7%	23.2%	10.2%
TH	18.1%	67.3%	9.9%	4.7%
TL	1.5%	65.7%	31.3%	1.5%
VN	9.2%	78.3%	9.8%	2.7%

AFFILIATION

Similar to 2025, the largest affiliation group is from the private sector (42.9%), while the smallest affiliation group is from regional or international organisations (5.3%). The second largest affiliation group is the government sector

(21.1%) followed by academia, think-tanks, or research institutions (19.5%). Civil society, non-government organisations, or media is represented by 11.2% of total respondents.



Q3 What is your affiliation?

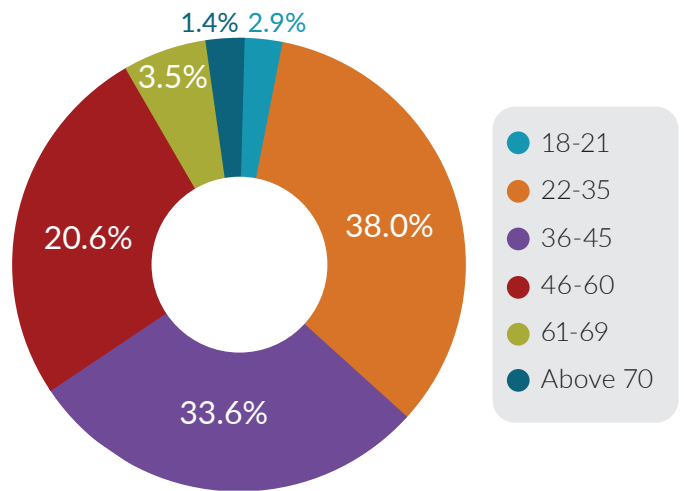
Country	Academia, Think-Tanks, or Research Institutions	Civil Society, Non-Government Organisations, or Media	Government	Private Sector	Regional or International Organisations
ASEAN	19.5%	11.2%	21.1%	42.9%	5.3%
BN	18.1%	7.7%	25.2%	48.4%	0.6%
KH	20.0%	15.0%	20.5%	41.5%	3.0%
ID	20.8%	19.1%	11.9%	42.4%	5.9%
LA	20.6%	9.0%	13.5%	49.7%	7.1%
MY	21.6%	12.4%	21.6%	39.2%	5.2%
MM	18.0%	9.0%	15.9%	53.4%	3.7%
PH	14.7%	12.8%	20.9%	46.0%	5.7%
SG	26.0%	10.2%	22.8%	32.5%	8.5%
TH	11.7%	4.1%	28.7%	47.4%	8.2%
TL	6.0%	25.4%	53.7%	11.9%	3.0%
VN	25.5%	3.8%	20.7%	45.7%	4.3%

AGE GROUP

In terms of age distribution, the largest group of respondents are those aged 22-35 years old (38.0%). This is followed by those aged between 36-45 years old (33.6%) and 46-60 years old (20.6%).

The older age groups – comprising respondents aged between 61-69 years old (3.5%) and above 70 years old (1.4%) – account for a combined total of 4.9%.

Similar to 2025, the smallest group consists of respondents aged between 18-21 years old (2.9%).



Q4 Which age group do you belong to?

Country	18-21	22-35	36-45	46-60	61-69	Above 70
ASEAN	2.9%	38.0%	33.6%	20.6%	3.5%	1.4%
BN	1.3%	28.4%	49.0%	18.7%	2.6%	0.0%
KH	3.0%	43.0%	41.0%	12.0%	1.0%	0.0%
ID	2.1%	39.0%	36.9%	18.6%	3.4%	0.0%
LA	0.6%	40.6%	45.2%	12.9%	0.6%	0.0%
MY	2.6%	37.6%	21.1%	30.4%	6.2%	2.1%
MM	1.6%	39.7%	41.3%	15.3%	2.1%	0.0%
PH	3.8%	43.6%	25.1%	20.9%	5.2%	1.4%
SG	3.7%	24.4%	25.6%	32.9%	6.5%	6.9%
TH	6.4%	46.2%	27.5%	14.6%	3.5%	1.8%
TL	0.0%	25.4%	29.9%	41.8%	3.0%	0.0%
VN	4.3%	44.6%	31.0%	16.8%	2.7%	0.5%

CONSUMPTION OF NEWS

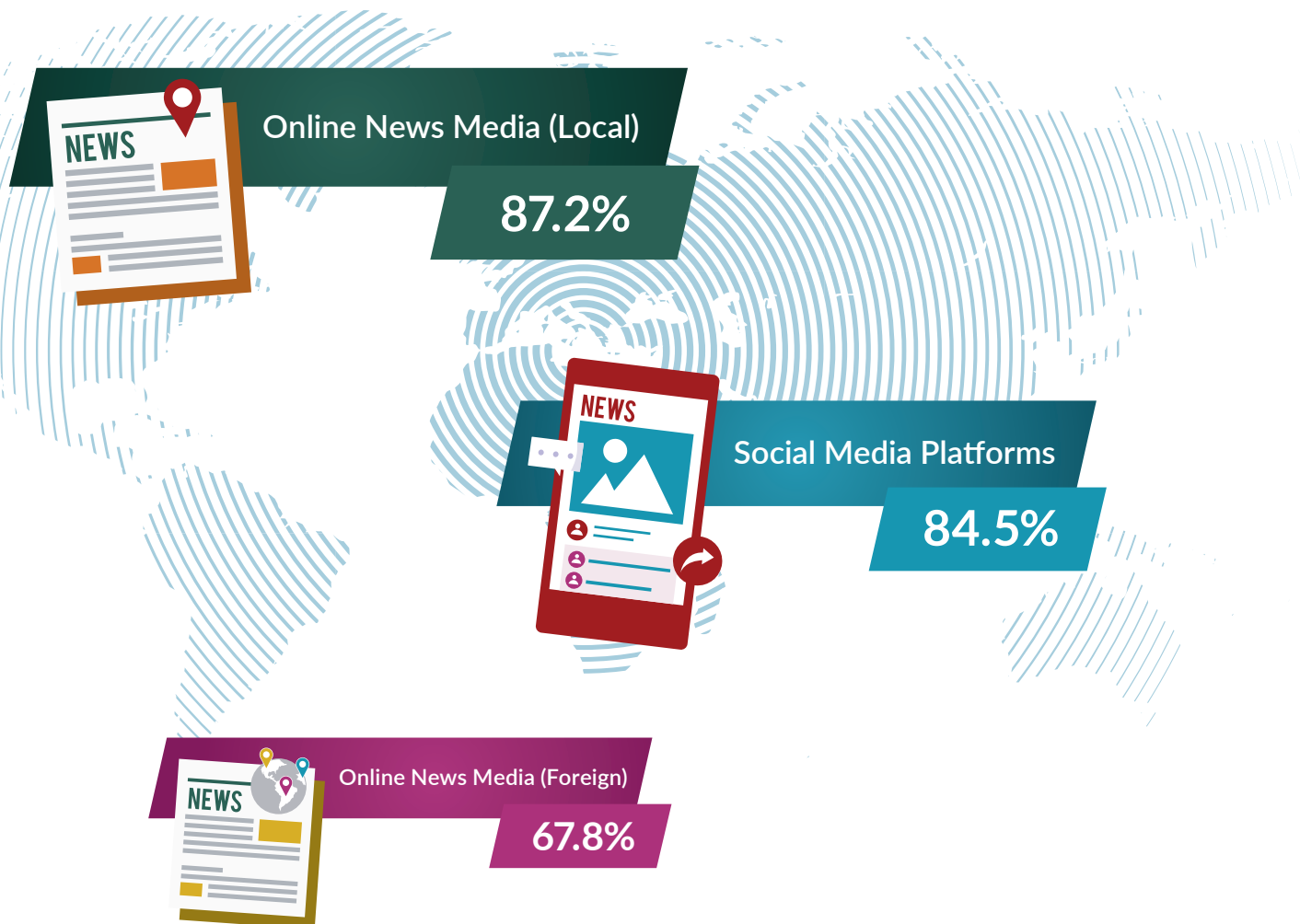
Digital news sources emerged as the top three sources for geopolitical affairs. At the regional level, local online news is ranked first (87.2%), followed by social media platforms at 84.5% and foreign online news at 67.8%. These three options are consistently ranked as the top choices across all ASEAN member states.

The most frequently cited local news outlets include *ABS-CBN News*, *Borneo Bulletin*, *GMA Network*, *Khmer Times*, *Kompas*, *Tempo*, *The Irrawaddy*, *The Star*, *Vientiane Times*, and *VNExpress*. Other local outlets mentioned include *The Bangkok Post*, *Bernama*, *Cambodia Express*, *Detik*, *Free Malaysia Today*, *Phnom Penh Post*, *Suara Timor-Leste*, and *Mothership*, amongst others.

Foreign online news platforms are also commonly used as a source of information, with popular sites including *Al-Jazeera*, *Bloomberg*, *Channel News Asia*, *CNN*, *Financial Times*, *Reuters*, and *The South China Morning Post*.

Besides news outlets, social media platforms are a common source of information. Facebook, Instagram, Tik Tok, and YouTube are the most mentioned platforms, while Reddit and X (Twitter) are less commonly mentioned.

Less relied-upon sources include Print Media (29.9%), reflecting the shift towards digital platforms, as well as Friends and Family (25.2%) and Others (5.4%). The ASEAN Secretariat website is also mentioned as a source of information, though to a limited extent.



Regional Outlook and Views on International Developments

13-34

This section examines the region's key challenges and main preoccupations. *Weighting of eleven ASEAN member states is applied from this section onwards.*

TOP THREE CHALLENGES FACING SOUTHEAST ASIA

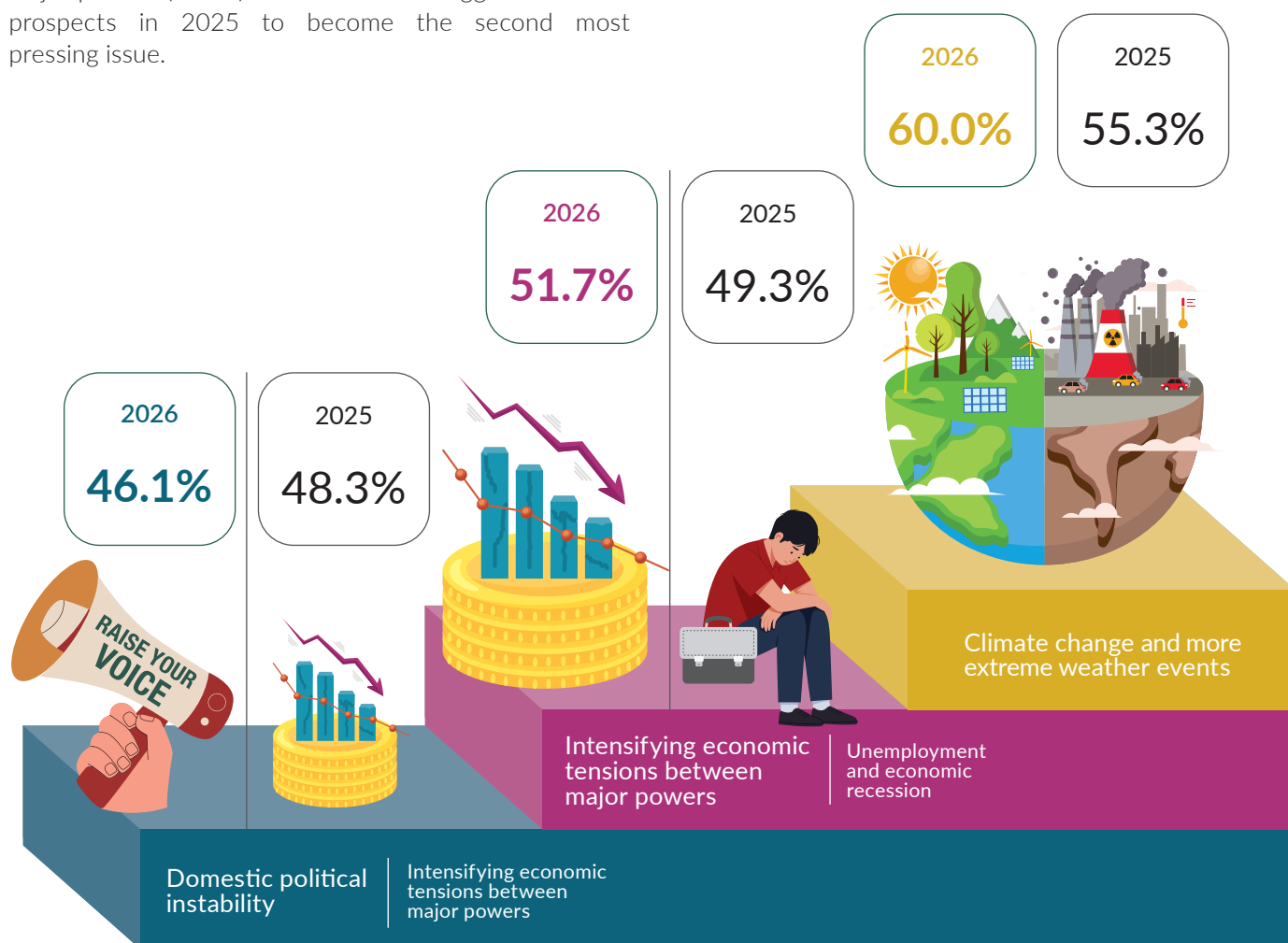
A majority of Southeast Asians (60.0%) identify climate change and intensifying extreme weather events as the region's most pressing challenge. The concern about climate change signals heightened public awareness of the economic, social, and environmental repercussions associated with prolonged droughts, severe flooding, typhoons, and rising sea levels.

At the country level, climate change is the top challenge for the Philippines (71.1%), Indonesia (67.4%), Laos (65.2%), Brunei (63.9%), Timor-Leste (62.7%), and Vietnam (62.5%). Apparently, perceived climate risk has become much more prominent for Brunei and Laos, with an increase of 26.3 and 17.5 percentage points from 2025 respectively. This could be mostly attributed to coastal risks and climate-related disasters that directly impact agriculture, energy, and rural communities.

Worries about intensifying economic tensions between major powers (51.7%) have overtaken sluggish economic prospects in 2025 to become the second most pressing issue.

The escalation of economic tensions among major powers has become the top concern for Singapore (61.8%), Thailand (60.8%), and Cambodia (57.5%). Economic recessionary fears still outweigh concerns over economic tensions between major powers in some member states, especially Indonesia (55.5%) and Brunei (52.3%).

Concerns over domestic political instability (46.1%) have emerged as the third option this year given the internal divisions, leadership transitions and governance challenges in several member states. This remains Myanmar's most pressing and persistent challenge at 59.8%, and is the second most significant concern for Thailand (58.5% – a remarkable increase of 24.3 percentage points from 2025), Malaysia (55.7%), and Timor-Leste (53.7%).



Q7 What are the top three challenges facing Southeast Asia? (Choose 3 responses)

2026

Country	Intensifying economic tensions between major powers	Unemployment and economic recession	Domestic political instability (e.g. ethnic and religious tensions, corruption)	Terrorism and extremism	Increased military tensions arising from potential flashpoints (e.g. South China Sea, Taiwan Strait, Korean Peninsula)	Climate change and more extreme weather events (e.g. droughts, floods, typhoons, rising sea levels, etc.)	Widening socio-economic gaps and rising income inequality	Deteriorating human rights conditions
ASEAN	51.7%	45.9%	46.1%	13.9%	42.3%	60.0%	32.6%	7.4%
BN	49.7%	52.3%	34.2%	16.1%	52.9%	63.9%	26.5%	4.5%
KH	57.5%	39.5%	35.5%	12.5%	50.0%	57.0%	37.5%	10.5%
ID	44.5%	55.5%	46.2%	5.9%	34.3%	67.4%	39.8%	6.4%
LA	52.3%	50.3%	32.3%	18.7%	40.6%	65.2%	33.5%	7.1%
MY	56.7%	42.3%	55.7%	12.4%	32.0%	55.7%	38.1%	7.2%
MM	40.7%	42.9%	59.8%	20.6%	32.3%	59.3%	25.4%	19.0%
PH	45.5%	42.7%	44.5%	13.3%	56.4%	71.1%	20.9%	5.7%
SG	61.8%	35.8%	37.8%	16.7%	50.0%	56.1%	37.4%	4.5%
TH	60.8%	48.5%	58.5%	15.2%	38.6%	39.2%	35.1%	4.1%
TL	52.2%	52.2%	53.7%	11.9%	25.4%	62.7%	34.3%	7.5%
VN	47.3%	43.5%	49.5%	9.2%	53.3%	62.5%	29.9%	4.9%

2025

Country	Intensifying economic tensions between major powers	Unemployment and economic recession	Domestic political instability (e.g. ethnic and religious tensions, corruption)	Terrorism and extremism	Increased military tensions arising from potential flashpoints (e.g. South China Sea, Taiwan Strait, Korean Peninsula)	Climate change and more extreme weather events (e.g. droughts, floods, typhoons, rising sea levels, etc.)	Widening socio-economic gaps and rising income inequality	Deteriorating human rights conditions
ASEAN	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%
TL	25.8%	57.6%	28.8%	6.1%	24.2%	77.3%	60.6%	19.7%
VN	39.4%	51.6%	32.3%	5.2%	51.0%	70.3%	42.6%	7.7%

TOP THREE GEOPOLITICAL CONCERNS

Across the eight geopolitical events surveyed this year, US leadership under President Trump has overtaken aggressive behaviour in the South China Sea in 2025 to become the top concern for ASEAN, at 51.9%. This perception demonstrates regional anxiety about inconsistencies in policy and the credibility of long-term commitments under Trump's leadership. This is the top concern among respondents from Singapore (76.8%), reflecting the country's sensitivity to its high trade exposure to the US and the risks posed by global economic and strategic volatility; followed by Indonesia (67.8%) and Laos (52.9%).

Global scam operations continue to rank second this year at 51.4%. Respondents from Thailand (60.8%), Singapore (57.7%), and Myanmar (56.6%) placed global scams as the second concern for their governments, while Timor-Leste considered this as their top concern at 52.2%.

Aggressive behaviour in the South China Sea is in third place this year, at 48.2%, a decrease of 3.4 percentage points compared to 2025. Similar to last year, it ranked highest for the three ASEAN claimant states, namely the Philippines (87.7%), Vietnam (66.8%), and Brunei (63.2%).

The Cambodia-Thailand border conflict, which has implications for ASEAN, emerges as one of the top concerns this year and is ranked fourth at 40.5%.

Thailand (88.9%) and Cambodia (66.0%) place the border conflict as their most pressing concern, which is not surprising considering that bilateral issues continue to arise from time to time along the Cambodia-Thailand border. Concerns over the Cambodia-Thailand border conflict are high in several other member states, mostly in Vietnam (63.0%) and Malaysia (46.4%), underscoring their strategic and geopolitical considerations coupled with concerns about potential spillover effects of the dispute that could undermine regional stability.

The ongoing Myanmar crisis is ranked 5th (28.0%), with 83.1% of Myanmar respondents regarding this as their top geopolitical concern. This is followed by worries about international drug smuggling (6th place), the Russia-Ukraine war (7th place), and the Israel-Hamas conflict (8th place). These perceptions indicate a generally lower level of preoccupation with geographically distant disputes. Nevertheless, the Israel-Hamas conflict continues to be the primary concern for Malaysia (58.8%) and the second-ranked concern for Indonesia (47.9%), the two biggest Muslim-majority countries in the region.

2026



2025



Q8 Which of the following current geopolitical events are the top concerns for the government in your country? (Choose 3 responses)

2026

Country	Russia-Ukraine War	Israel-Hamas Conflict	US leadership under President Trump	Aggressive behaviour in the South China Sea	Myanmar crisis	Cambodia-Thailand border conflict	Global scam operations	International drug smuggling
ASEAN	26.6%	26.5%	51.9%	48.2%	28.0%	40.5%	51.4%	26.9%
BN	26.5%	34.8%	51.6%	63.2%	35.5%	27.7%	43.9%	16.8%
KH	25.0%	17.5%	43.5%	52.5%	29.0%	66.0%	52.5%	14.0%
ID	21.6%	47.9%	67.8%	44.5%	10.6%	25.8%	45.3%	36.4%
LA	21.3%	20.0%	52.9%	41.9%	44.5%	38.1%	51.6%	29.7%
MY	20.6%	58.8%	51.5%	48.5%	18.0%	46.4%	41.8%	14.4%
MM	25.4%	12.2%	38.1%	39.7%	83.1%	20.1%	56.6%	24.9%
PH	26.1%	11.8%	43.1%	87.7%	10.0%	10.9%	56.4%	54.0%
SG	33.3%	34.1%	76.8%	39.4%	14.2%	27.6%	57.7%	16.7%
TH	22.2%	9.9%	56.1%	15.8%	14.6%	88.9%	60.8%	31.6%
TL	28.4%	35.8%	44.8%	29.9%	35.8%	31.3%	52.2%	41.8%
VN	42.4%	8.7%	44.6%	66.8%	12.5%	63.0%	46.2%	15.8%

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	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%
TL	39.4%	18.2%	47.0%	42.4%	59.1%	13.6%	47.0%	33.3%
VN	62.6%	16.1%	49.0%	74.8%	20.0%	17.4%	34.8%	25.2%

TOP CONCERN ABOUT ASEAN

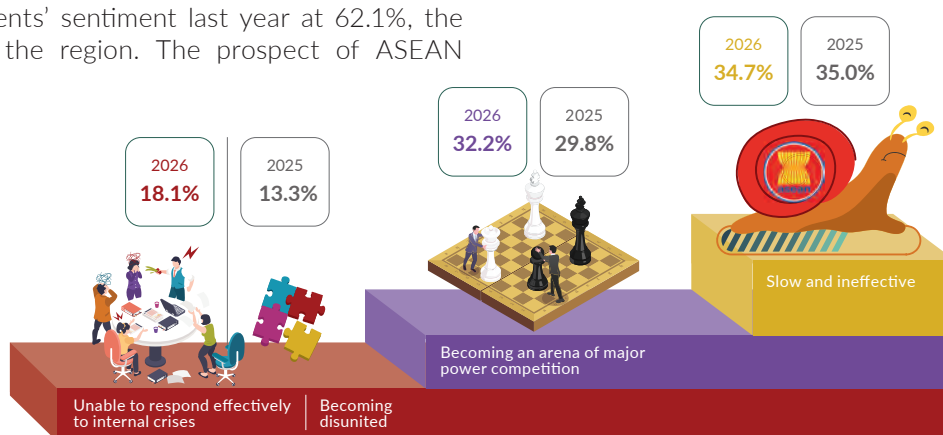
34.7% of respondents, a marginal difference compared to last year (35.0%), feel that ASEAN is slow and ineffective, and thus cannot cope with fluid political and economic developments. Perceived institutional inertia and limited decision-making capacity within ASEAN may have constrained its effectiveness and relevance in the evolving global order. This sentiment is ranked as the top concern for six countries, namely Brunei (48.4%), Indonesia (46.6%), Myanmar (45.5%), Cambodia (43.5%), Laos (41.3%), and the Philippines (31.3%).

Similar to last year, concerns that ASEAN risks becoming an arena of major power competition and its members may become major power proxies is not far behind, at 32.2%. ASEAN's newest member, Timor-Leste, continues to rank this as the primary concern at 55.2%, similar to their respondents' sentiment last year at 62.1%, the highest level in the region. The prospect of ASEAN

becoming a theatre for major power rivalry that may consequently erode ASEAN centrality and compromise regional stability is also strongly perceived by Malaysia (42.3%), Vietnam (38.0%), Singapore (33.3%), and Thailand (31.6%).

ASEAN's inability to respond effectively to internal crises (18.1%) is the third ranking concern, surpassing ASEAN's disunity (10.6%) in 4th place. This could reflect an inherent tension between its principled commitment to state sovereignty and the growing expectation for collective responsibility.

Concern about ASEAN's elitism and ordinary people's disenchantment with the organisation is ranked last at 4.3%, a significant decrease compared to last year (9.6%).



Q9 What is your top concern about ASEAN? (Choose 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 respond effectively to internal crises	
	2025	2026	2025	2026	2025	2026	2025	2026	2025	2026
ASEAN	29.8%	32.2%	13.3%	10.6%	9.6%	4.3%	35.0%	34.7%	12.2%	18.1%
BN	26.2%	29.0%	13.4%	9.0%	16.8%	5.2%	30.9%	48.4%	12.8%	8.4%
KH	29.7%	27.5%	11.0%	7.5%	8.7%	5.0%	36.6%	43.5%	14.0%	16.5%
ID	19.8%	19.1%	7.1%	6.4%	10.7%	9.3%	54.8%	46.6%	7.5%	18.6%
LA	28.5%	29.7%	11.9%	9.7%	12.6%	3.9%	32.5%	41.3%	14.6%	15.5%
MY	33.3%	42.3%	9.6%	7.7%	10.8%	3.6%	32.1%	28.4%	14.2%	18.0%
MM	19.6%	21.2%	13.4%	7.4%	16.5%	4.2%	45.9%	45.5%	4.6%	21.7%
PH	35.4%	27.5%	14.6%	14.2%	7.8%	4.3%	29.6%	31.3%	12.6%	22.7%
SG	38.0%	33.3%	14.9%	17.5%	5.4%	4.1%	30.2%	27.6%	11.6%	17.5%
TH	29.6%	31.6%	19.9%	19.9%	4.6%	4.7%	30.6%	27.5%	15.3%	16.4%
TL	62.1%	55.2%	6.1%	3.0%	7.6%	0.0%	18.2%	14.9%	6.1%	26.9%
VN	38.1%	38.0%	17.4%	14.7%	2.6%	3.3%	27.1%	27.2%	14.8%	16.8%

TENSIONS IN THE SOUTH CHINA SEA

Concerns over developments in the South China Sea remain pronounced and broadly consistent with last year's findings. The top concern among ASEAN respondents is China's encroachments in the exclusive economic zones (EEZs) and continental shelves of Southeast Asia's littoral states (51.7%), underscoring that sovereignty, maritime rights and access to resources remain at the heart of regional anxieties. This concern is particularly strong amongst claimant states such as Vietnam (66.3%), the Philippines and Brunei (both at 64.5%), reflecting continued sensitivities over territorial entitlements under the United Nations Convention on the Law of the Sea (UNCLOS).

The second most cited concern is the risk of an accidental confrontation between an ASEAN member state and China that could result in a political crisis (45.2%).

This highlights persistent fears of miscalculation and escalation at sea. Indonesia (55.1%), Timor-Leste (53.7%), Laos (52.3%), and Cambodia (50.5%) express especially high concern, suggesting that apprehension over unintended incidents extends beyond claimant states to the wider region.

While sovereignty-related concerns dominate, broader strategic anxieties remain significant. China's militarisation and assertive actions (37.9%) continue to trouble respondents, particularly in the Philippines (50.2%) and Vietnam (47.8%). Meanwhile, a direct military confrontation between the US and China (36.8%), ranks fourth, and reflects ongoing unease about major power rivalry spilling over into the region and that escalation between Washington and Beijing remains a credible risk.

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



An accidental confrontation between an ASEAN member state and China that results in a political crisis



China's militarisation and assertive actions in the SCS



Q10 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	
	2025	2026	2025	2026	2025	2026	2025	2026	2025	2026	2025	2026
ASEAN	36.5%	36.8%	44.3%	45.2%	48.2%	51.7%	40.6%	37.9%	12.8%	10.0%	17.6%	18.4%
BN	32.2%	20.6%	45.0%	45.8%	48.3%	64.5%	51.0%	45.8%	8.7%	5.8%	14.8%	17.4%
KH	38.4%	38.0%	44.2%	50.5%	40.1%	47.5%	42.4%	38.5%	12.2%	8.5%	22.7%	17.0%
ID	40.5%	46.6%	50.8%	55.1%	57.5%	51.7%	18.7%	19.5%	17.1%	11.4%	15.5%	15.7%
LA	44.4%	33.5%	53.6%	52.3%	33.8%	54.8%	40.4%	36.1%	10.6%	11.0%	17.2%	12.3%
MY	39.2%	38.7%	40.4%	43.3%	53.8%	52.1%	36.3%	35.1%	8.8%	8.8%	21.7%	22.2%
MM	29.4%	32.8%	45.4%	46.0%	47.4%	54.5%	46.9%	41.8%	11.3%	7.9%	19.6%	16.9%
PH	28.2%	21.3%	28.2%	28.4%	57.8%	64.5%	46.6%	50.2%	18.0%	11.8%	21.4%	23.7%
SG	38.0%	47.6%	57.0%	48.8%	38.4%	35.8%	40.5%	36.6%	10.7%	9.8%	15.3%	21.5%
TH	49.5%	48.5%	45.4%	43.3%	41.8%	42.7%	28.1%	40.4%	23.5%	15.8%	11.7%	9.4%
TL	43.9%	50.7%	56.1%	53.7%	39.4%	34.3%	25.8%	25.4%	10.6%	9.0%	24.2%	26.9%
VN	25.8%	26.1%	32.9%	29.9%	63.2%	66.3%	54.8%	47.8%	7.1%	10.3%	16.1%	19.6%

CODE OF CONDUCT ON THE SOUTH CHINA SEA

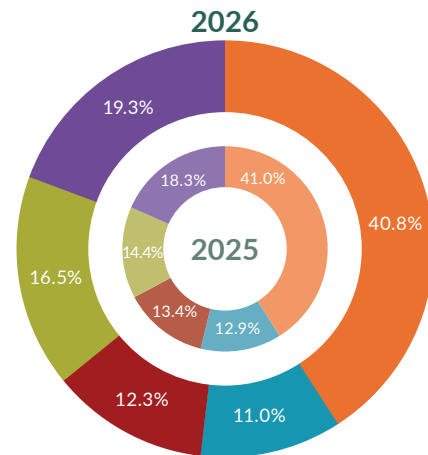
The Philippines as ASEAN Chair is pushing to accelerate negotiations on the Code of Conduct (COC) in the South China Sea (SCS). Despite limited progress in recent years, respondents' views reflect expectations and cautious realism about what the agreement should achieve.

Similar to last year, the dominant position among ASEAN respondents is that the COC must be aligned with international law, including the United Nations Convention on the Law of the Sea (UNCLOS) at 40.8%, reinforcing the region's consistent preference for a rules-based maritime order. This preference is particularly strong in Vietnam (68.5%), Timor-Leste (61.2%) and the Philippines (50.2%), indicating that claimant states remain firm that any eventual agreement should not compromise established legal principles governing maritime rights and entitlements.

At the same time, respondents exhibit a pragmatic understanding of the COC's potential limitations. Nearly one-fifth (19.3%) of respondents believe the COC will prevent other powers from conducting military activities and energy exploration with ASEAN member states in the SCS, suggesting concerns that the agreement could inadvertently constrain ASEAN's external security partnerships. This view is especially notable in Laos (30.3%) and Brunei (27.1%). Meanwhile, 16.5% take a more pragmatic approach, assessing that while the COC

may not resolve territorial disputes, it could help reduce tensions and manage the dispute, with Myanmar (30.7%) registering the highest support for this perspective.

Scepticism about the COC's viability remains present but not dominant, with 12.3% believing it will not materialise due to China's unwillingness to relinquish its claims.



- Must be aligned with international law
- Must not involve other powers in the SCS issue
- Will not materialise because China will never give up its claims
- Will not resolve the territorial disputes but will help reduce tensions
- Will prevent other powers from conducting military activities

Q11 In my view, the Code of Conduct... (Choose 1 option)

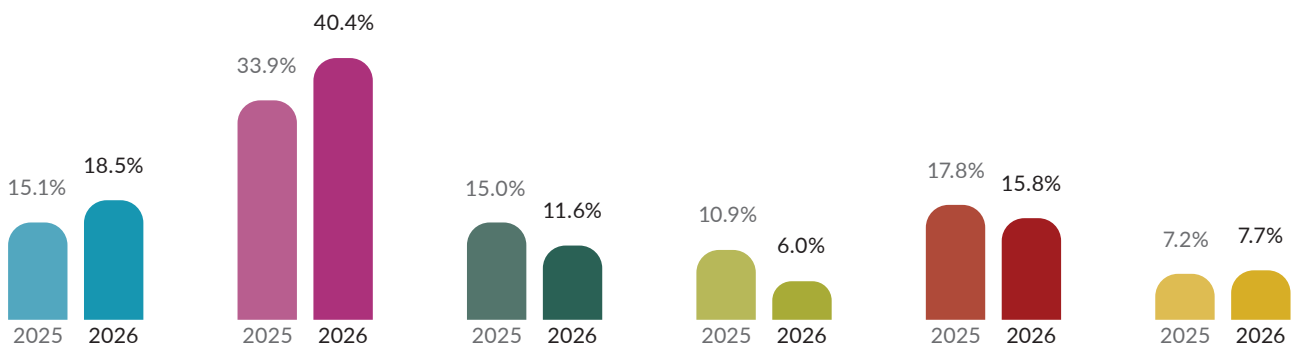
Country	Must be aligned with international law, including UNCLOS		Must not involve other powers in the SCS issue once ASEAN and China have reached agreement on the COC		Will not materialise because China will never give up its territorial and jurisdictional claims based on the Nine-Dash Line		Will not 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	
	2025	2026	2025	2026	2025	2026	2025	2026	2025	2026
ASEAN	41.0%	40.8%	12.9%	11.0%	13.4%	12.3%	14.4%	16.5%	18.3%	19.3%
BN	22.8%	27.1%	21.5%	11.6%	10.7%	12.3%	16.1%	21.9%	28.9%	27.1%
KH	34.9%	33.0%	16.9%	10.0%	13.4%	14.0%	14.0%	22.0%	20.9%	21.0%
ID	48.0%	44.5%	9.1%	12.3%	10.3%	8.5%	13.9%	16.5%	18.7%	18.2%
LA	42.4%	29.7%	18.5%	9.7%	8.6%	15.5%	10.6%	14.8%	19.9%	30.3%
MY	32.9%	30.9%	17.1%	16.0%	15.0%	11.9%	20.4%	20.1%	14.6%	21.1%
MM	33.0%	25.4%	13.4%	9.0%	16.0%	13.2%	16.0%	30.7%	21.6%	21.7%
PH	54.4%	50.2%	7.3%	6.2%	13.1%	16.1%	10.7%	12.3%	14.6%	15.2%
SG	37.6%	40.7%	9.1%	10.2%	22.7%	19.5%	19.8%	15.9%	10.7%	13.8%
TH	40.8%	37.4%	15.3%	24.0%	12.2%	10.5%	11.7%	6.4%	19.9%	21.6%
TL	63.6%	61.2%	10.6%	7.5%	6.1%	4.5%	10.6%	11.9%	9.1%	14.9%
VN	63.2%	68.5%	1.3%	4.9%	11.6%	9.8%	10.3%	9.2%	13.5%	7.6%

MOVING THE MYANMAR ISSUE FORWARD

Similar to last year’s findings, engaging in independent dialogue with all key stakeholders remains the top choice for ASEAN, at 40.4%. This reaffirms the region’s preference for the sole practicable solution endorsed unanimously by all member states. The second preferred option is to downgrade or limit ASEAN’s engagement with the regime at 18.5%, an increase from 15.1% in 2025, highlighting the organisation’s policy of excluding Myanmar’s leadership from high-level engagements while exerting pressure to promote adherence to the Five-Point Consensus (5PC). This option garners substantial support from Laos (32.9%), Brunei (26.5%), and Cambodia (21.0%). Ranking third is utilising harder methods to increase the regime’s costs for non-compliance with the 5PC at

15.8%, of which Vietnam (23.9%), Thailand (22.2%), and Indonesia (21.2%) are most supportive.

The option of formulating a coordinated and unified response in collaboration with international partners receives support from 11.6% of the regional respondents, with Singapore being the most supportive (22.0%), in contrast to Timor-Leste with the lowest vote (1.5%). Only 7.7% of the regional respondents support reinstating the regime’s involvement in ASEAN meetings, with the highest level of support from Malaysia (13.4%). The non-interference option (6.0%) is in last place, with the most support from Vietnam (12.0%).



Q12 To move the Myanmar issue forward, ASEAN should:

Country	Downgrade/limit engagement with the regime until the situation in Myanmar improves towards political stability and a willingness to respond to ASEAN’s regional diplomacy		Engage in independent dialogue with all key stakeholders, including the National Unity Government, in Myanmar to build trust		Mount a coordinated and unified response with international partners		Not interfere in Myanmar’s domestic politics		Utilise harder methods (e.g., suspension, targeted sanctions) to increase the costs for the regime of its non-compliance with the 5PC		Reinstate the regime’s involvement in ASEAN meetings to continue pushing for 5PC implementation	
	2025	2026	2025	2026	2025	2026	2025	2026	2025	2026	2025	2026
ASEAN	15.1%	18.5%	33.9%	40.4%	15.0%	11.6%	10.9%	6.0%	17.8%	15.8%	7.2%	7.7%
BN	15.4%	26.5%	26.2%	36.1%	20.1%	11.0%	10.1%	2.6%	20.8%	17.4%	7.4%	6.5%
KH	15.1%	21.0%	31.4%	47.5%	15.7%	11.5%	12.2%	0.5%	16.9%	7.5%	8.7%	12.0%
ID	13.5%	15.3%	48.0%	46.6%	6.7%	7.2%	5.6%	5.1%	21.0%	21.2%	5.2%	4.7%
LA	22.5%	32.9%	25.2%	37.4%	15.9%	10.3%	15.2%	1.9%	15.2%	14.2%	6.0%	3.2%
MY	16.3%	19.1%	38.3%	34.0%	12.1%	9.8%	8.8%	5.2%	17.5%	18.6%	7.1%	13.4%
MM	16.5%	20.6%	28.4%	36.5%	17.5%	12.7%	6.7%	4.8%	20.6%	15.9%	10.3%	9.5%
PH	12.1%	15.2%	41.3%	37.9%	14.1%	15.2%	13.1%	7.6%	11.2%	13.7%	8.3%	10.4%
SG	17.8%	16.3%	29.3%	28.0%	18.6%	22.0%	9.9%	10.2%	15.7%	11.8%	8.7%	11.8%
TH	15.8%	17.5%	36.2%	32.2%	11.2%	14.0%	14.8%	10.5%	19.4%	22.2%	2.6%	3.5%
TL	4.5%	14.9%	59.1%	64.2%	10.6%	1.5%	12.1%	6.0%	10.6%	7.5%	3.0%	6.0%
VN	5.8%	4.3%	34.8%	43.5%	18.1%	12.5%	12.9%	12.0%	20.0%	23.9%	8.4%	3.8%

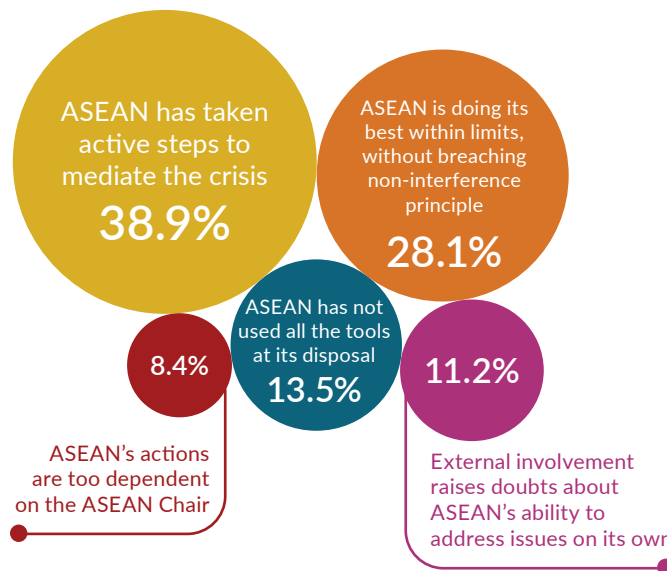
CAMBODIA-THAILAND BORDER CONFLICT

More than one-third of the regional respondents (38.9%) agree that ASEAN has taken active steps to mediate the Cambodia-Thailand border crisis through the convening of ministerial meetings and the deployment of diplomatic engagement at both formal and informal levels. This sentiment is strongly felt in Timor-Leste (62.7%), Vietnam (54.9%), and Malaysia (40.7%).

The second most preferred option is the perspective that ASEAN is doing its best within its institutional limits, at 28.1%. Guided by its principles of non-interference and consensus-based decision-making, ASEAN has adopted a neutral posture to preserve regional stability. This is the top choice for Brunei (43.2%) and Laos (40.6%). Only 28.0% of Cambodia respondents and 24.0% of Thai respondents support this view, reflecting their higher expectation of ASEAN exercising enhanced strategic agency in addressing border disputes and sustaining the regional order.

The perception that ASEAN is not using all the tools at its disposal in response to the Cambodia-Thailand border conflict is supported by 13.5% of the regional respondents, with Indonesia exhibiting the highest sentiment (25.4%), followed by Myanmar (19.6%) and Laos (15.5%).

A smaller proportion of respondents (11.2%) express concern about the involvement of external powers in the ceasefire, highlighting questions about ASEAN's ability to address issues on its own terms. Only 8.4% of the regional respondents felt that ASEAN's actions are too dependent on the ASEAN Chair, which exposes the grouping's structural weaknesses.



Q13 Which of the following best describes ASEAN's response to the Cambodia-Thailand border conflict?

Country	ASEAN has not used all the tools at its disposal, such as the Treaty of Amity and Cooperation's High Council, to address the conflict	ASEAN has taken active steps to mediate the crisis (e.g., through the Foreign Ministers' Statement, the Extraordinary Cambodia-Thailand General Border Committee (GBC) Meeting, and the Kuala Lumpur Peace Accord)	ASEAN is doing the best it can within its institutional limits, without violating the principle of non-interference	ASEAN's actions are too dependent on the ASEAN Chair, exposing the grouping's structural weaknesses	The involvement of external powers in the ceasefire raises questions about ASEAN's ability to address issues on its own terms
ASEAN	13.5%	38.9%	28.1%	8.4%	11.2%
BN	9.0%	29.7%	43.2%	10.3%	7.7%
KH	9.5%	40.0%	28.0%	11.0%	11.5%
ID	25.4%	36.0%	20.8%	8.1%	9.7%
LA	15.5%	30.3%	40.6%	5.2%	8.4%
MY	11.3%	40.7%	25.8%	7.7%	14.4%
MM	19.6%	33.3%	23.3%	12.2%	11.6%
PH	10.0%	38.9%	30.3%	9.0%	11.8%
SG	12.2%	22.4%	35.4%	11.8%	18.3%
TH	13.5%	38.6%	24.0%	8.8%	15.2%
TL	9.0%	62.7%	20.9%	1.5%	6.0%
VN	13.0%	54.9%	16.8%	6.5%	8.7%

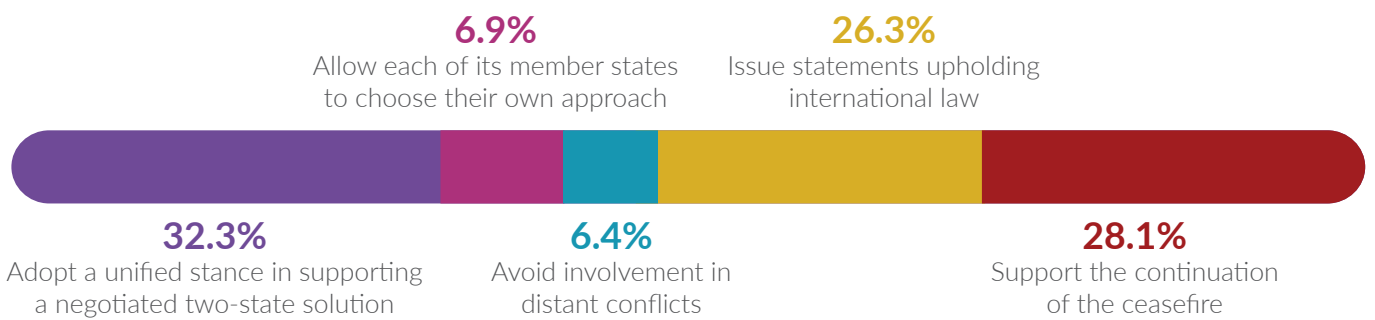
ISRAEL-HAMAS CONFLICT

Since 2023, the conflict in the Middle East has reshaped the global security landscape. Most ASEAN countries have expressed concern over the humanitarian crisis and called for de-escalation while managing diplomatic sensitivities.

In responding to the ongoing Israel-Hamas conflict, more than one-third of respondents favour ASEAN adopting a unified stance in support of a negotiated two-state solution as the basis for long-term peace (32.3%). Support for this position is particularly strong in Timor-Leste (44.8%), Thailand (40.4%), and Vietnam (37.5%), underscoring a clear expectation in these countries for ASEAN to speak with one diplomatic voice.

The second most favoured approach is supporting the continuation of the ceasefire and ensuring sustained humanitarian assistance (28.1%). This perspective is most pronounced in Malaysia (40.7%), Singapore (36.6%), Cambodia (34.5%), and the Philippines (31.8%).

Issuing statements upholding international law and condemning violations by all parties ranks closely behind at 26.3% and is the favoured approach for Indonesia (33.9%). In contrast, fewer respondents support allowing each member state to choose its own approach (6.9%) or avoiding involvement in distant conflicts that do not directly impact regional security (6.4%).



Q14 How should ASEAN respond to the ongoing Israel-Hamas conflict and broader tensions in the Middle East?

Country	ASEAN should adopt a unified stance in supporting a negotiated two-state solution as the basis for long-term peace	ASEAN should allow each of its member states to choose their own approach towards this issue	ASEAN should avoid involvement in distant conflicts that do not directly impact regional security	ASEAN should issue statements upholding international law and condemning violations by all parties	ASEAN should support the continuation of the ceasefire and ensure sustained humanitarian assistance
ASEAN	32.3%	6.9%	6.4%	26.3%	28.1%
BN	29.7%	11.6%	3.9%	27.1%	27.7%
KH	30.0%	8.5%	6.0%	21.0%	34.5%
ID	26.7%	5.1%	4.2%	33.9%	30.1%
LA	32.9%	8.4%	7.7%	25.2%	25.8%
MY	25.3%	4.1%	7.2%	22.7%	40.7%
MM	28.6%	13.2%	5.8%	27.0%	25.4%
PH	28.9%	4.3%	8.5%	26.5%	31.8%
SG	30.5%	6.9%	6.9%	19.1%	36.6%
TH	40.4%	5.3%	8.8%	22.8%	22.8%
TL	44.8%	4.5%	3.0%	29.9%	17.9%
VN	37.5%	3.8%	8.2%	34.2%	16.3%

TIMOR-LESTE'S ASEAN MEMBERSHIP

Close to half of the regional respondents (49.2%) agree that Timor-Leste's accession will contribute significantly to the shared goals of the ASEAN Community, while 46.9% believe its impact will remain neutral and only 3.9% disagree. These findings point to cautious optimism.

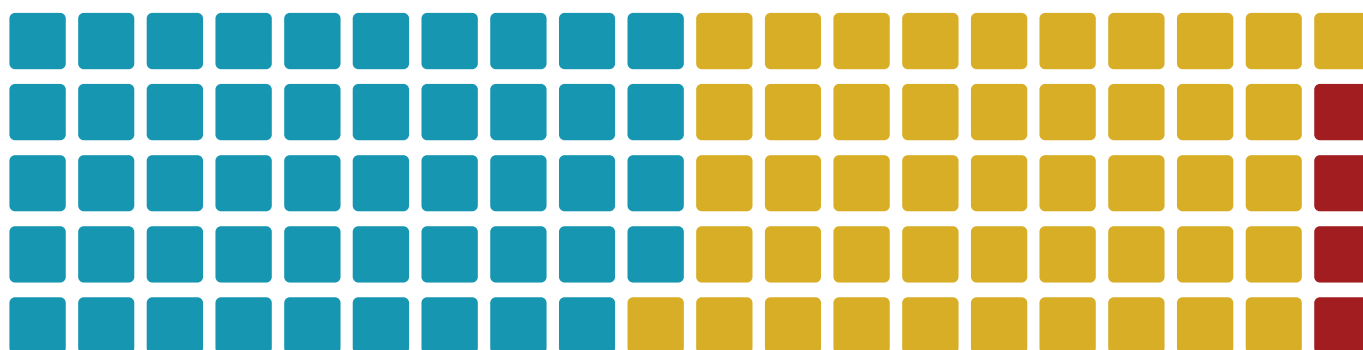
At the country level, support is strongest in Timor-Leste (76.1%) and Vietnam (65.2%), both well above the ASEAN average. Malaysia (59.8%) and the Philippines (50.7%) also record majority agreement. In contrast, respondents in Singapore (37.4%), Indonesia (39.0%), Myanmar (39.2%), Thailand (40.4%), Cambodia (42.0%), and Laos (43.2%)

show lower levels of agreement, with most respondents in these countries selecting the neutral option.

Neutral responses exceed more than half in Thailand (56.1%), Indonesia (55.9%), Myanmar (54.5%), Singapore (54.1%), Cambodia (53.0%), and Laos (52.9%), indicating considerable caution across much of ASEAN.

Meanwhile, disagreement remains marginal across all countries, peaking only in Singapore (8.5%) and Myanmar (6.3%).

😊 Yes 😐 Neutral ☹️ No



Q15 The accession of Timor-Leste to ASEAN will contribute significantly to the shared goals of the ASEAN Community. Do you agree with this statement?

Country	Yes	Neutral / Remain the Same	No
ASEAN	49.2%	46.9%	3.9%
BN	48.4%	45.8%	5.8%
KH	42.0%	53.0%	5.0%
ID	39.0%	55.9%	5.1%
LA	43.2%	52.9%	3.9%
MY	59.8%	37.1%	3.1%
MM	39.2%	54.5%	6.3%
PH	50.7%	47.9%	1.4%
SG	37.4%	54.1%	8.5%
TH	40.4%	56.1%	3.5%
TL	76.1%	23.9%	0.0%
VN	65.2%	34.8%	0.0%

Q15A Why do you think the accession of Timor-Leste will contribute positively to the shared goals of the ASEAN Community?

Among respondents who view Timor-Leste's accession positively, the main reason is the expectation that it will provide greater opportunities for political development and economic growth for Timor-Leste and the region (54.0%). This choice is particularly strong in Laos (68.7%), the Philippines (67.3%), Cambodia (66.7%), Singapore (56.5%), and Brunei (56.0%).

18.6% of ASEAN respondents believe Timor-Leste will contribute significantly to ASEAN's regional objectives.

This view is most pronounced in Vietnam (31.7%) and Singapore (26.1%), as well as Malaysia (20.7%), Myanmar (20.3%), and Thailand (20.3%).

17.6% of respondents say accession signals ASEAN's commitment to inclusivity. This perspective is especially strong in Vietnam (35.8%) and Myanmar (24.3%).

Only 9.7% of respondents see Timor-Leste's accession as balancing ASEAN's strategic positioning and relevance in the regional order. This rationale is more salient in Indonesia (19.6%) and Timor-Leste itself (17.6%).



Country	It signals ASEAN's commitment to inclusivity	It will balance ASEAN's strategic positioning and relevance in the regional order	It will contribute significantly to ASEAN's regional objectives	It will provide greater opportunities for political development and economic growth for Timor-Leste and the region
ASEAN	17.6%	9.7%	18.6%	54.0%
BN	13.3%	12.0%	18.7%	56.0%
KH	15.5%	8.3%	9.5%	66.7%
ID	22.8%	19.6%	13.0%	44.6%
LA	11.9%	4.5%	14.9%	68.7%
MY	15.5%	10.3%	20.7%	53.4%
MM	24.3%	9.5%	20.3%	45.9%
PH	10.3%	8.4%	14.0%	67.3%
SG	15.2%	2.2%	26.1%	56.5%
TH	17.4%	13.0%	20.3%	49.3%
TL	11.8%	17.6%	15.7%	54.9%
VN	35.8%	1.7%	31.7%	30.8%

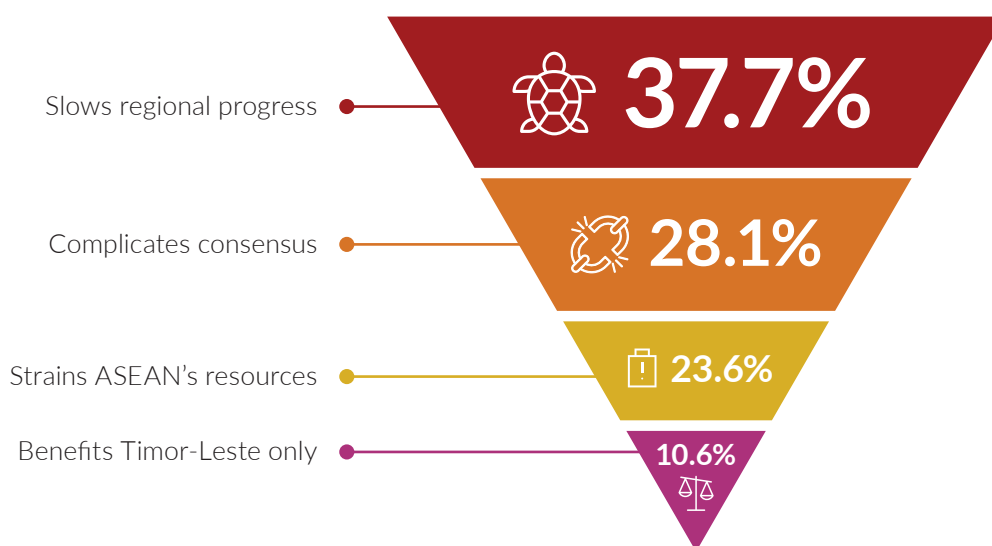
Q15B Why do you think the accession of Timor-Leste will contribute negatively to the shared goals of the ASEAN Community?

Among respondents who hold negative views about Timor-Leste's accession, the primary concern is that it will slow down regional development and ASEAN's key objectives (37.7%). This perception is particularly strong in the Philippines (66.7%), Laos and Malaysia (both at 50.0%), Cambodia (40.0%), and Singapore (38.1%). These findings suggest that scepticism is largely driven by fears that enlargement could impede ASEAN's efficiency and overall progress.

A further 28.1% believe accession will complicate ASEAN's consensus-based decision-making process. This concern is most pronounced in Brunei (55.6%) and Malaysia (50.0%), followed by Cambodia (40.0%) and Myanmar (33.3%).

23.6% of ASEAN respondents worry that accession will require ASEAN's limited resources to support Timor-Leste's readiness and capacity. This concern is especially evident in Indonesia (66.7%), Thailand (50.0%), and Singapore (33.3%).

Only 10.6% believe accession will primarily benefit Timor-Leste's development without delivering broader regional gains. This view is most visible in the Philippines (33.3%) and Brunei (22.2%).



Country	It will complicate ASEAN's consensus-based decision-making process	It will only benefit Timor-Leste's development	It will require ASEAN's limited resources to support Timor-Leste's readiness and capacity	It will slow down regional development and ASEAN's key objectives
ASEAN	28.1%	10.6%	23.6%	37.7%
BN	55.6%	22.2%	11.1%	11.1%
KH	40.0%	10.0%	10.0%	40.0%
ID	0.0%	8.3%	66.7%	25.0%
LA	33.3%	0.0%	16.7%	50.0%
MY	50.0%	0.0%	0.0%	50.0%
MM	33.3%	16.7%	25.0%	25.0%
PH	0.0%	33.3%	0.0%	66.7%
SG	23.8%	4.8%	33.3%	38.1%
TH	16.7%	0.0%	50.0%	33.3%
TL	0.0%	0.0%	0.0%	0.0%
VN	0.0%	0.0%	0.0%	0.0%

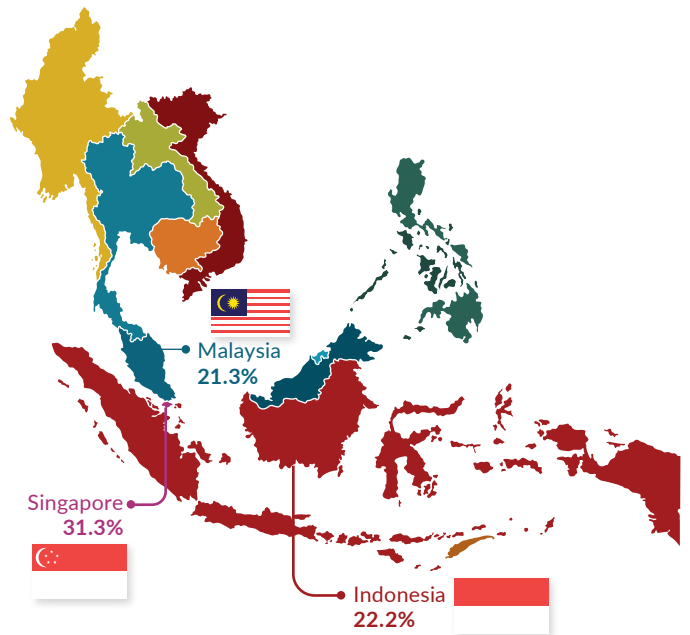
MEMBER STATES' CONTRIBUTION TO ASEAN'S LONG-TERM DEVELOPMENT AND PROGRESS

Singapore (31.3%) is recognised as the leading contributor in addressing key regional challenges, followed by Indonesia (22.2%) and Malaysia (21.3%). Together, these three countries account for more than 70% of responses. Thailand (7.9%) ranks a distant fourth, while the remaining countries receive marginal recognition.

Singapore emerges as the top choice in six ASEAN member states: the Philippines (50.7%), Malaysia (49.0%), Thailand (45.0%), Indonesia (38.1%), Vietnam (36.4%) and Cambodia (28.0%).

Indonesia is the second most recognised contributor and is the top choice among respondents from Myanmar (33.9%), Brunei and Laos (both at 32.3%).

Malaysia ranks third at the ASEAN level (21.3%) and is the top choice among respondents from Singapore (52.4%) and Timor-Leste (43.3%).



Q16 Apart from your own country, which ASEAN member state has shown the strongest leadership within ASEAN in addressing key regional challenges (e.g. South China Sea, Myanmar crisis, digital economy, climate change) in recent years?

Country	Brunei Darussalam	Cambodia	Indonesia	Laos	Malaysia	Myanmar	Philippines	Singapore	Thailand	Timor-Leste	Vietnam
ASEAN	2.8%	1.7%	22.2%	1.4%	21.3%	1.7%	4.7%	31.3%	7.9%	1.0%	3.9%
BN	0.0%	1.9%	32.3%	2.6%	20.0%	3.9%	4.5%	28.4%	4.5%	1.3%	0.6%
KH	1.0%	0.0%	27.5%	4.0%	24.5%	4.0%	5.5%	28.0%	3.5%	1.0%	1.0%
ID	5.9%	0.4%	0.0%	0.0%	34.7%	1.3%	7.2%	38.1%	8.5%	0.4%	3.4%
LA	0.6%	4.5%	32.3%	0.0%	7.7%	3.2%	7.7%	29.0%	8.4%	0.0%	6.5%
MY	7.7%	1.0%	25.8%	0.0%	0.0%	1.5%	2.6%	49.0%	8.2%	2.1%	2.1%
MM	2.1%	3.2%	33.9%	1.6%	14.8%	0.0%	5.8%	21.2%	13.2%	0.5%	3.7%
PH	0.9%	3.3%	12.3%	0.0%	11.8%	2.4%	0.0%	50.7%	9.0%	1.9%	7.6%
SG	8.9%	1.2%	14.2%	0.8%	52.4%	0.8%	5.7%	0.0%	10.2%	0.8%	4.9%
TH	1.8%	2.3%	16.4%	3.5%	12.3%	0.6%	4.7%	45.0%	0.0%	1.8%	11.7%
TL	0.0%	0.0%	32.8%	0.0%	43.3%	0.0%	3.0%	17.9%	1.5%	0.0%	1.5%
VN	2.2%	1.1%	16.8%	2.7%	12.5%	1.1%	5.4%	36.4%	20.1%	1.6%	0.0%

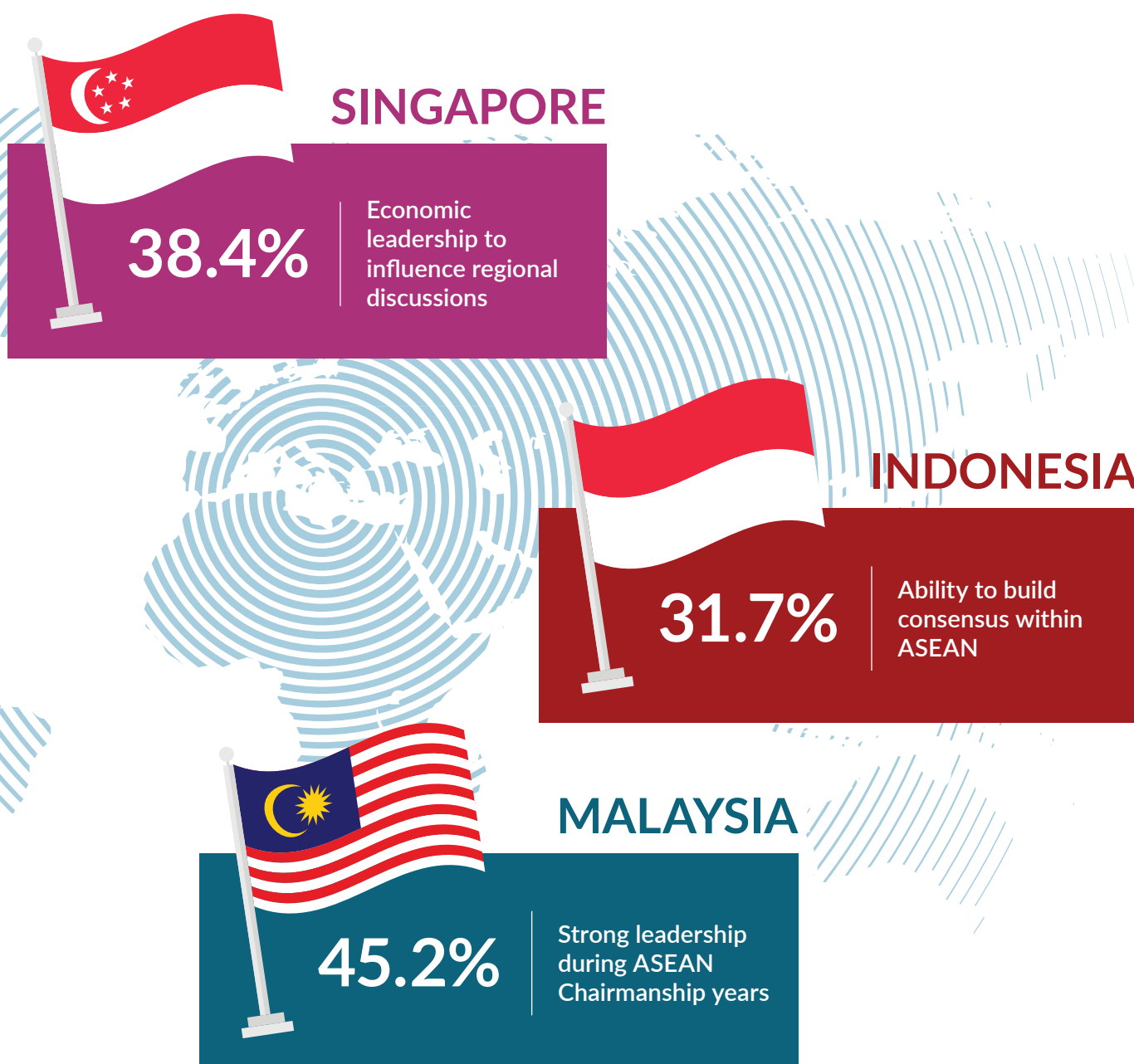
*Note: The top choice for each country is reflected in bold in the data table.

Q16A Why do you believe so?

Among those who chose Singapore, the primary reason respondents regard it positively is its economic leadership in influencing regional discussions (38.4%). This reason stands out prominently in Indonesia (56.7%), Timor-Leste (50.0%), Thailand (45.5%), and Malaysia (41.1%). This underscores Singapore's reputation as a key economic driver within ASEAN.

Among respondents who chose Indonesia, the most cited reason is the ability to build consensus within ASEAN (31.7%). This factor is particularly pronounced in Cambodia (54.5%), Brunei (48.0%), Singapore (42.9%), and Laos (36.0%). These findings reflect a strong perception of Indonesia as a key mediator within ASEAN.

In the case of Malaysia, the largest group of respondents point to its strong leadership during its ASEAN Chairmanship years (45.2%). The perception is particularly evident in Vietnam (69.6%), Timor-Leste (58.6%), Brunei (54.8%), Myanmar (53.6%), Cambodia (53.1%), and Singapore (51.2%), suggesting that Malaysia's ASEAN Chairmanship in 2025 has significantly shaped regional views on its leadership role.



Q16A Why do you believe so?

Country		Ability to build consensus within ASEAN	Economic leadership to influence regional discussions	Political leadership to influence regional discussions	Strong leadership during ASEAN Chairmanship years	Technical expertise and capacity-building contributions
Singapore	ASEAN	12.2%	38.4%	8.6%	17.6%	23.2%
	BN	22.7%	29.5%	11.4%	20.5%	15.9%
	KH	14.3%	21.4%	7.1%	28.6%	28.6%
	ID	11.1%	56.7%	3.3%	8.9%	20.0%
	LA	15.6%	33.3%	6.7%	15.6%	28.9%
	MY	14.7%	41.1%	8.4%	16.8%	18.9%
	MM	10.0%	35.0%	5.0%	17.5%	32.5%
	PH	12.1%	38.3%	7.5%	22.4%	19.6%
	TH	5.2%	45.5%	5.2%	14.3%	29.9%
	TL	0.0%	50.0%	25.0%	16.7%	8.3%
VN	16.4%	32.8%	6.0%	14.9%	29.9%	
Indonesia	ASEAN	31.7%	16.0%	14.6%	27.4%	10.3%
	BN	48.0%	6.0%	4.0%	32.0%	10.0%
	KH	54.5%	10.9%	10.9%	16.4%	7.3%
	LA	36.0%	20.0%	14.0%	12.0%	18.0%
	MY	32.0%	16.0%	10.0%	32.0%	10.0%
	MM	32.8%	21.9%	4.7%	29.7%	10.9%
	PH	19.2%	15.4%	23.1%	38.5%	3.8%
	SG	42.9%	11.4%	22.9%	17.1%	5.7%
	TH	14.3%	32.1%	14.3%	32.1%	7.1%
	TL	18.2%	13.6%	22.7%	31.8%	13.6%
VN	19.4%	12.9%	19.4%	32.3%	16.1%	
Malaysia	ASEAN	21.0%	14.5%	11.7%	45.2%	7.6%
	BN	22.6%	9.7%	9.7%	54.8%	3.2%
	KH	16.3%	12.2%	10.2%	53.1%	8.2%
	ID	23.2%	18.3%	22.0%	22.0%	14.6%
	LA	33.3%	25.0%	8.3%	16.7%	16.7%
	MM	21.4%	10.7%	7.1%	53.6%	7.1%
	PH	16.0%	16.0%	8.0%	44.0%	16.0%
	SG	27.1%	7.0%	12.4%	51.2%	2.3%
	TH	9.5%	42.9%	19.0%	28.6%	0.0%
	TL	27.6%	3.4%	6.9%	58.6%	3.4%
VN	13.0%	0.0%	13.0%	69.6%	4.3%	

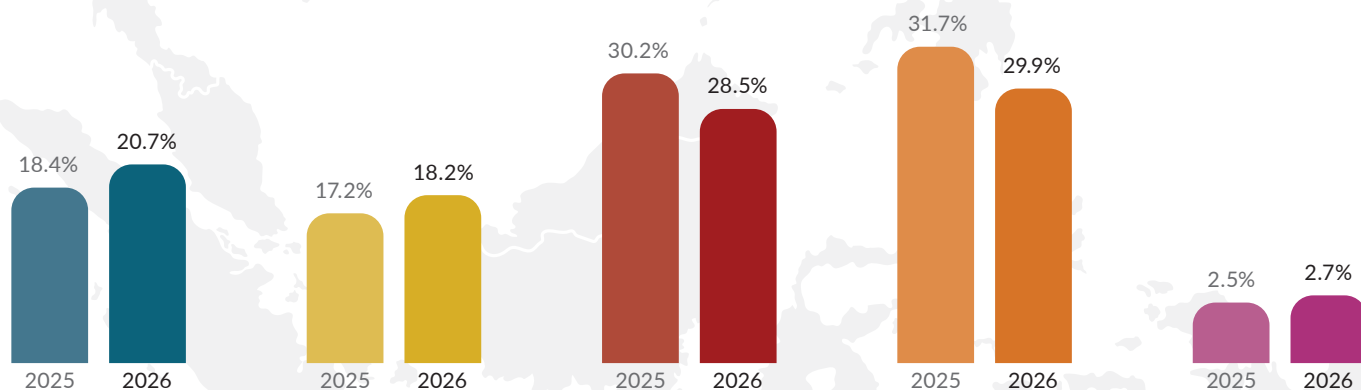
ENHANCING ASEAN'S RESILIENCE AND RELEVANCE

The ability of ASEAN to resolve its differences over long-standing issues such as the Myanmar crisis and the South China Sea dispute (29.9%), remains the most cited means for ASEAN to enhance its resilience and demonstrate its relevance, slightly lower than 2025 (31.7%). This sentiment is most strongly felt by Myanmar (41.8%), Vietnam (39.7%) and the Philippines (34.6%) as per the previous year.

Not surprisingly, in a year of heightened geco-economic tensions and volatile US trade policy movements, the focus on increasing intra-regional trade and investments remains strong (28.5%). This is the second-most cited strategy for enhancing resilience though marginally down from the share recorded in 2025 (30.2%). Brunei (40.6%), Laos (38.7%), and Singapore (32.1%) feel most strongly about this initiative, whilst Indonesia's sentiments are

the weakest (17.4%). Though respondents from Thailand feel very strongly about this strategy in 2025 (40.3%), sentiments waned considerably this year (28.1%).

One trend that has strengthened in this year's survey is the greater consensus on the need to build alternative supply chains to shield from adverse impacts of ongoing trade tensions (20.7%), an increase from last year (18.4%). Prior to 2025, trade tensions were primarily between the US and China, with Southeast Asian economies being the periphery casualty. However, after the imposition of reciprocal tariffs on all countries following the US Liberation Day announcement in April 2025, the impetus to diversify value chains has climbed higher on the agenda. Timor-Leste (26.9%), Malaysia (24.7%), and Thailand (22.8%) express the strongest sentiments.



Q17 How should ASEAN enhance its resilience and demonstrate its relevance?

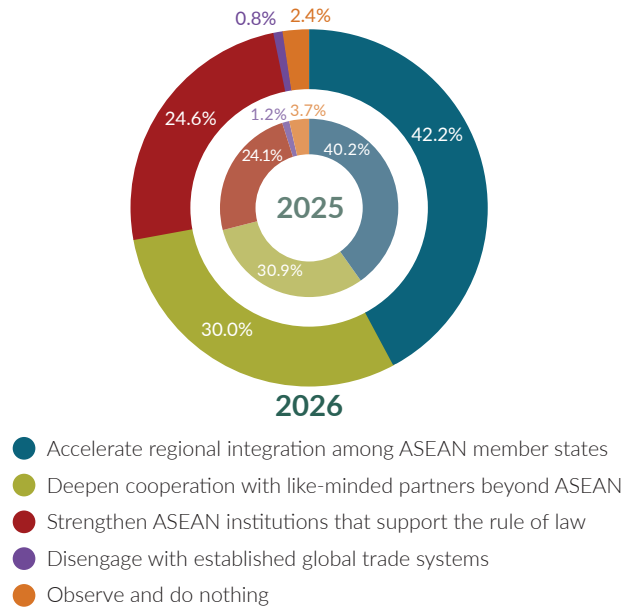
Country	Build alternative supply chains so as not to be caught up in the next trade war		Cooperate with strategic partners and join more multilateral groupings		Focus on increasing intra-regional trade and investment		Resolve its differences over issues such as Myanmar and SCS		Do nothing because ASEAN is already resilient and does not need to demonstrate its relevance	
	2025	2026	2025	2026	2025	2026	2025	2026	2025	2026
ASEAN	18.4%	20.7%	17.2%	18.2%	30.2%	28.5%	31.7%	29.9%	2.5%	2.7%
BN	22.1%	21.9%	24.8%	20.6%	28.2%	40.6%	20.1%	14.8%	4.7%	1.9%
KH	19.2%	16.5%	12.2%	14.0%	31.4%	29.0%	35.5%	34.5%	1.7%	6.0%
ID	18.3%	21.2%	30.2%	29.7%	19.4%	17.4%	31.0%	31.8%	1.2%	0.0%
LA	13.9%	19.4%	14.6%	11.0%	40.4%	38.7%	27.2%	23.9%	4.0%	7.1%
MY	22.9%	24.7%	14.2%	16.5%	32.5%	32.0%	29.2%	25.3%	1.3%	1.5%
MM	12.4%	18.0%	17.5%	11.6%	25.8%	24.3%	42.3%	41.8%	2.1%	4.2%
PH	13.6%	18.5%	18.9%	20.9%	25.2%	24.2%	36.4%	34.6%	5.8%	1.9%
SG	26.0%	21.5%	12.4%	17.9%	38.8%	32.1%	21.9%	27.6%	0.8%	0.8%
TH	14.8%	22.8%	15.8%	25.7%	40.3%	28.1%	27.6%	20.5%	1.5%	2.9%
TL	10.6%	26.9%	18.2%	11.9%	33.3%	23.9%	36.4%	34.3%	1.5%	3.0%
VN	20.6%	16.3%	11.6%	20.7%	20.0%	23.4%	45.8%	39.7%	1.9%	0.0%

RISING PROTECTIONISM AND NATIONALISM

Accelerating regional integration among the ASEAN member states, retains its top spot as the most cited response to rising global protectionism and nationalism (42.2%). Vietnam exhibited very strong sentiments on this point (61.4%), as did Brunei (49.0%) and Laos (47.1%). These responses suggest a clear preference among many respondents for deeper intra-ASEAN economic cooperation as a buffer against external economic uncertainties. By contrast, support is relatively more muted in Timor-Leste and Indonesia. Interestingly, respondents from the Philippines – the current ASEAN Chair – register the lowest level of support for this option among ASEAN member states (31.3%).

The sentiments towards deepening cooperation with like-minded partners outside ASEAN remains strong at 30.0% and is the second most cited strategic response by ASEAN respondents. Thailand (47.4%), Indonesia (41.1%), and Singapore (38.6%) lean most strongly towards this response with Indonesia showing the most significant increase in respondent share from last year. Indonesia has successfully secured several high-profile trade deals such as the EU-Indonesia Comprehensive Economic Partnership Agreement (CEPA) in September 2025 and the US-Indonesia Agreement on Reciprocal Trade (ART) in February 2026.

For the Philippines (40.8%) and Timor-Leste (32.8%), there is a strong showing for the option of strengthening ASEAN institutions that support the rule of law as a credible response to rising protectionism and nationalism (24.6%). These responses highlight different pathways towards deeper regional economic integration and may reflect a more nuanced perspective to advancing integration amongst the ASEAN countries.



Q18 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	
	2025	2026	2025	2026	2025	2026	2025	2026	2025	2026
ASEAN	40.2%	42.2%	30.9%	30.0%	24.1%	24.6%	1.2%	0.8%	3.7%	2.4%
BN	35.6%	49.0%	24.8%	18.1%	29.5%	29.7%	4.7%	1.3%	5.4%	1.9%
KH	40.1%	45.5%	27.3%	25.0%	24.4%	26.0%	1.7%	1.0%	6.4%	2.5%
ID	41.7%	32.6%	34.5%	41.1%	22.2%	25.4%	0.8%	0.4%	0.8%	0.4%
LA	31.1%	47.1%	29.8%	20.6%	29.1%	26.5%	2.0%	0.6%	7.9%	5.2%
MY	42.9%	43.8%	31.7%	33.5%	24.6%	20.6%	0.0%	0.0%	0.8%	2.1%
MM	42.3%	45.0%	26.3%	21.2%	24.7%	27.5%	0.5%	1.6%	6.2%	4.8%
PH	33.5%	31.3%	22.8%	24.6%	41.7%	40.8%	0.5%	0.5%	1.5%	2.8%
SG	35.1%	36.6%	40.5%	38.6%	19.8%	20.3%	0.8%	1.2%	3.7%	3.3%
TH	43.9%	39.2%	43.9%	47.4%	9.7%	10.5%	1.0%	0.6%	1.5%	2.3%
TL	43.9%	32.8%	33.3%	34.3%	22.7%	32.8%	0.0%	0.0%	0.0%	0.0%
VN	55.5%	61.4%	27.1%	25.5%	14.8%	10.9%	0.0%	1.1%	2.6%	1.1%

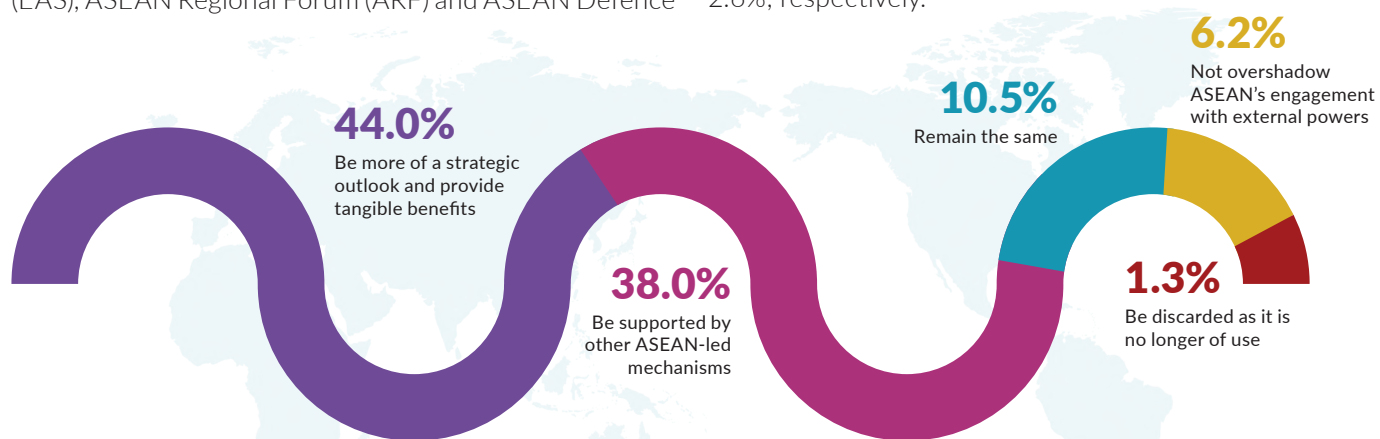
VIEWS ON THE ASEAN OUTLOOK ON THE INDO-PACIFIC (AOIP)

The ASEAN Outlook on the Indo-Pacific (AOIP) was formally adopted in 2019 to set out the strategic framework for ASEAN to deepen cooperation in the Indo-Pacific region. However, perceptions of its effectiveness have been mixed, and the initiative has yet to generate consistent momentum to establish itself as a key platform for strengthening ASEAN's external relationships and collaboration with external partners.

44.0% of ASEAN respondents feel that the AOIP should be positioned as more of a strategic outlook and provide tangible benefits. This view is held most strongly by Timor-Leste (61.2%), Vietnam (57.6%), and Indonesia (55.5%). Following this view, 38.0% of ASEAN respondents feel that the AOIP should be better supported by other ASEAN-led mechanisms such as the East Asia Summit (EAS), ASEAN Regional Forum (ARF) and ASEAN Defence

Ministers Meeting-Plus (ADMM-Plus) to achieve its aims. Amongst the main proponents of this are Thailand (50.3%), Laos (47.1%), and Brunei (42.6%). In the original conception of the AOIP, the EAS was identified as one of the key platforms to support its objectives. Meanwhile, respondents from Brunei (15.5%) and Thailand (15.2%) who prefer the AOIP to remain unchanged may reflect support for strengthening the existing framework rather than introducing significant changes to the mechanism.

Although respondent sentiments reflecting calls for the AOIP not to overshadow ASEAN's engagement with external powers (6.2%) and to do away with the AOIP altogether (1.3%) are more muted, Myanmar respondents felt most strongly about these two aspects compared to the other ASEAN countries at 14.3% and 2.6%, respectively.



Q19 The ASEAN Outlook on the Indo-Pacific should:

Country	Be more of a strategic outlook and provide tangible benefits	Be supported by other ASEAN-led mechanisms such as the EAS, ARF and ADMM+	Remain the Same	Not overshadow ASEAN's engagement with external powers	Be discarded as it is no longer of use
ASEAN	44.0%	38.0%	10.5%	6.2%	1.3%
BN	32.9%	42.6%	15.5%	7.7%	1.3%
KH	50.0%	32.5%	10.5%	5.5%	1.5%
ID	55.5%	30.5%	8.1%	4.7%	1.3%
LA	32.9%	47.1%	12.3%	5.8%	1.9%
MY	40.2%	40.7%	9.8%	8.2%	1.0%
MM	34.4%	36.5%	12.2%	14.3%	2.6%
PH	49.3%	35.5%	6.6%	8.1%	0.5%
SG	38.6%	39.0%	13.8%	6.1%	2.4%
TH	31.6%	50.3%	15.2%	2.3%	0.6%
TL	61.2%	31.3%	6.0%	1.5%	0.0%
VN	57.6%	31.5%	6.0%	3.8%	1.1%

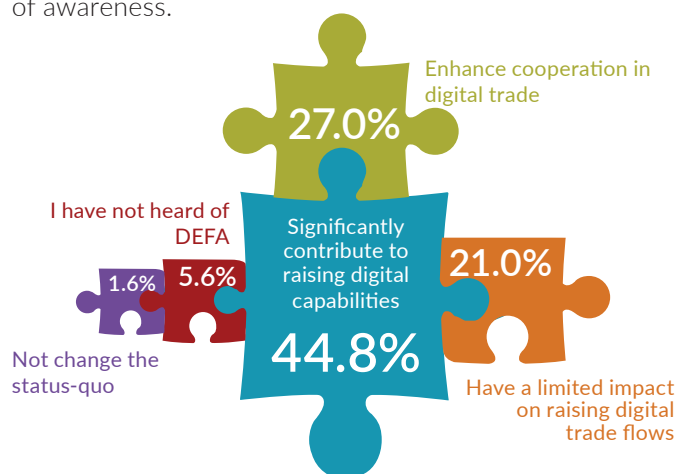
VIEWS ON THE ASEAN DIGITAL ECONOMIC FRAMEWORK AGREEMENT (DEFA)

Despite limited details on what the substantial conclusion of the Digital Economic Framework Agreement (DEFA) negotiations at the end of last year entails, optimism on what the DEFA can achieve once entered into force remains strong. Most ASEAN respondents (44.8%) cite that the DEFA is expected to significantly contribute to raising digital capabilities and enhance regional digital trade, which represents a moderate acceleration in this sentiment compared to 2025 findings (37.3%). In particular, Timor-Leste (64.2%), Vietnam (51.1%), and Cambodia (51.0%) are the most optimistic.

The second most cited response is that the DEFA will enhance cooperation in digital trade integration initiatives (27.0%), with stronger support from Singapore (42.3%), Malaysia (38.7%), and the Philippines (33.2%).

There was a notable increase in a more subdued sentiment where respondents feel that the DEFA would have a limited impact on raising digital trade flows due to regional differences in standards and digital capabilities, rising to 21.0% from 17.4% a year earlier. This sentiment is most strongly seen in Thailand (36.3%), Myanmar (29.1%), and Laos (28.4%).

On a positive note, there is a decrease in the proportion of ASEAN respondents who had not heard of the DEFA (5.6%) this year, the lowest reading for this response since the DEFA negotiations started in 2023 (2025: 11.9%, 2024: 16.8%). Awareness of the Agreement has grown, in part driven by the rapid acceleration of digitalisation not only in the business community but in all facets of life. No respondents from Thailand are unaware of the DEFA whilst Brunei and Cambodia also exhibit high levels of awareness.



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	
	2025	2026	2025	2026	2025	2026	2025	2026	2025	2026
ASEAN	37.3%	44.8%	29.4%	27.0%	17.4%	21.0%	4.0%	1.6%	11.9%	5.6%
BN	31.5%	46.5%	30.2%	26.5%	16.8%	21.3%	6.0%	1.3%	15.4%	4.5%
KH	30.8%	51.0%	36.0%	22.0%	16.9%	21.5%	4.1%	2.0%	12.2%	3.5%
ID	41.3%	46.2%	25.4%	28.0%	18.7%	16.9%	2.0%	3.0%	12.7%	5.9%
LA	38.4%	44.5%	31.1%	20.6%	16.6%	28.4%	7.3%	0.0%	6.6%	6.5%
MY	43.8%	41.8%	26.7%	38.7%	14.6%	12.4%	3.3%	2.1%	11.7%	5.2%
MM	24.7%	38.6%	25.3%	20.6%	26.3%	29.1%	8.8%	2.1%	14.9%	9.5%
PH	44.7%	38.4%	28.2%	33.2%	9.7%	20.4%	1.0%	0.5%	16.5%	7.6%
SG	33.9%	28.5%	34.3%	42.3%	17.4%	20.3%	1.2%	2.8%	13.2%	6.1%
TH	35.7%	42.7%	30.1%	17.5%	23.5%	36.3%	2.0%	3.5%	8.7%	0.0%
TL	62.1%	64.2%	22.7%	19.4%	6.1%	9.0%	0.0%	0.0%	9.1%	7.5%
VN	48.4%	51.1%	26.5%	27.7%	14.2%	15.2%	3.9%	0.5%	7.1%	5.4%

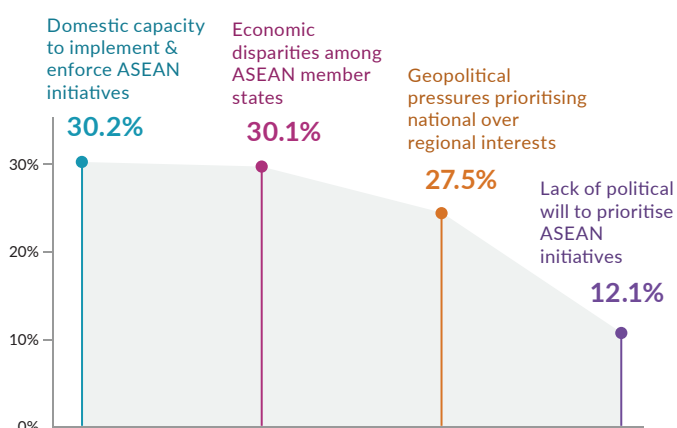
INTRA-REGIONAL ECONOMIC COOPERATION INITIATIVES

With the ASEAN Economic Community (AEC) Strategic Plan (2026-2030) now underway, ASEAN will seek to address key economic challenges such as risks to supply chain resilience, inclusive growth, climate change and digitalisation. However, survey responses suggest that significant structural constraints continue to impede deeper economic integration. Impediments referencing member states' domestic technocratic implementation capacities (30.2%) as well as the disparity in member states' economic development (30.1%) come in at even keel amongst ASEAN respondents. Countries who feel more strongly about the domestic-centric implementation challenges are Laos (36.1%), Timor-Leste (35.8%), and Cambodia (35.0%). Those less concerned about domestic implementation capabilities include Indonesia (17.8%), Thailand (22.2%), and Singapore (25.2%).

On the other hand, countries who feel more strongly about the development divide having impact on the economic integration agenda are Vietnam (40.2%), Thailand (36.8%), and Myanmar (34.4%). Those less concerned are the Philippines (23.7%), Timor-Leste (23.9%), and Cambodia (25.0%). The mixed distribution of responses across both more developed and less developed ASEAN member states suggests that development disparities may create challenges in different ways where less-developed economies may face capacity constraints in implementing

commitments, while more-developed economies may encounter difficulties to move ahead at the desired pace.

Beyond institutional and developmental factors, pressures resulting from geopolitical tensions are also becoming more apparent. 27.5% of ASEAN respondents cite the presence of geopolitical pressures affecting regional interests as a key impediment. Indonesia (41.9%), the Philippines (32.7%), and Timor-Leste (31.3%) are the most concerned about this aspect. A smaller proportion of respondents (12.1%) cite a lack of political will to prioritise ASEAN initiatives as a key impediment.



Q21 What do you think is the biggest impediment to ASEAN's effectiveness in promoting greater intra-regional economic cooperation initiatives (e.g. trade integration, cross-border investment activities)?

Country	ASEAN member states' domestic technocratic capacity to implement and enforce ASEAN initiatives	Disparity in economic development amongst the ASEAN member states	Geopolitical pressures which may influence individual ASEAN member states to prioritise their national interests over regional interests	Lack of political will to prioritise ASEAN initiatives
ASEAN	30.2%	30.1%	27.5%	12.1%
BN	34.8%	31.6%	18.1%	15.5%
KH	35.0%	25.0%	26.5%	13.5%
ID	17.8%	27.5%	41.9%	12.7%
LA	36.1%	27.7%	23.9%	12.3%
MY	28.9%	28.4%	28.9%	13.9%
MM	31.2%	34.4%	25.4%	9.0%
PH	34.1%	23.7%	32.7%	9.5%
SG	25.2%	32.1%	26.8%	15.9%
TH	22.2%	36.8%	24.6%	16.4%
TL	35.8%	23.9%	31.3%	9.0%
VN	31.5%	40.2%	22.8%	5.4%

Major Powers' Regional Influence and Leadership

35-46

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

MOST INFLUENTIAL ECONOMIC POWER IN SOUTHEAST ASIA

Perceptions of China as the most influential economic power in Southeast Asia continue this year with 55.9% of ASEAN respondents holding this view, just marginally down from the 56.4% recorded in 2025. Malaysia (67.5%), Indonesia, and Timor-Leste (both at 59.7%) feel most strongly about this, while respondents from the Philippines (36.5%) remain less sanguine as per previous years.

ASEAN respondents who cite the US as being the most influential economic power (15.3%) remain quite steady relative to last year. The most positive countries are the Philippines (27.5%), Singapore (19.1%), and Thailand (18.1%).

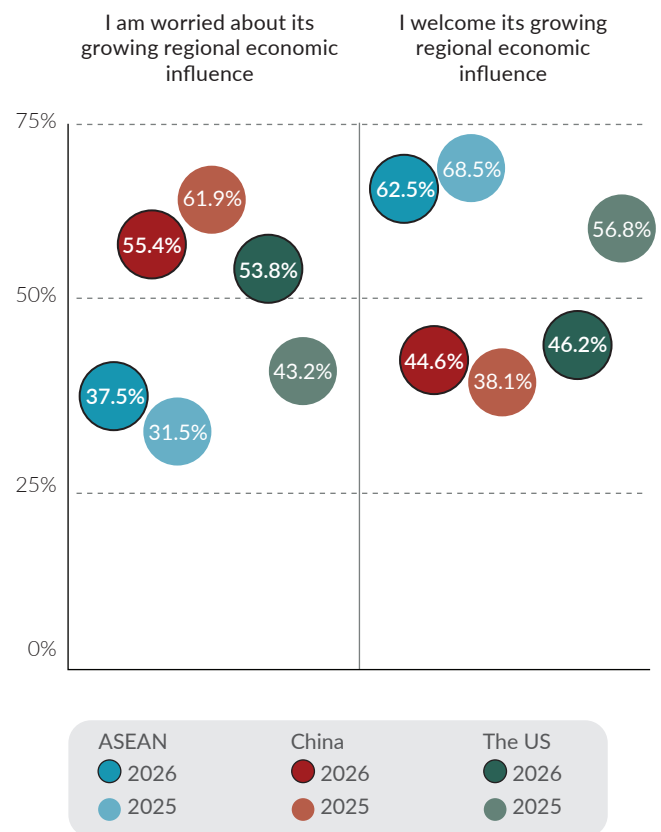
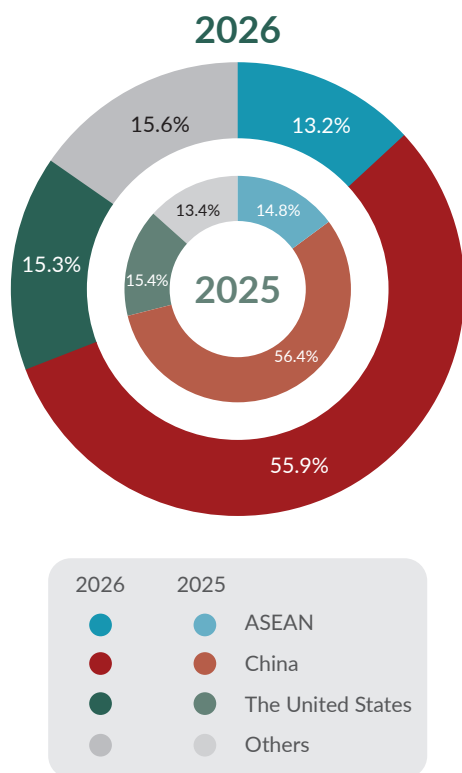
For ASEAN, a slightly lower proportion of respondents cite itself as the most influential economic power at 13.2% compared to 14.8% the previous year. The main proponents of ASEAN are Indonesia (19.9%), Timor-Leste (17.9%) and the Philippines (17.5%). That said, all the ASEAN member states show a drop in shares from the previous year except for Laos, Singapore, and Thailand.

Despite China's dominance as the most influential economic power in the region, ASEAN respondents remain primarily worried of its growing regional influence (55.4%).

Amongst the wariest are Thailand (90.6%), Vietnam (81.9%), and the Philippines (81.8%). On the other hand, the countries which are most welcoming of its growing influence are Brunei (71.6%), Cambodia (64.9%), and Indonesia (57.4%).

For the US, perceived as the second most influential economic power in the region, concern now outweighs welcome. A majority of respondents 53.8% (2025: 43.2%) worry about its influence, compared with 46.2% who welcome its influence. Concern is highest in Thailand (90.3%), Malaysia (62.5%), and Singapore (61.7%), all export-oriented economies. By contrast, Cambodia (70.4%), the Philippines (63.8%) and Myanmar (56.5%) are most welcoming of its growing regional influence.

Perceptions of ASEAN's economic influence have softened slightly this year. While a majority of respondents still welcome ASEAN's growing regional economic influence (62.5%), this represents a decline from last year's 68.5%. The ASEAN countries most welcoming of ASEAN's growing economic influence are Brunei (87.5%), Cambodia (75.0%), and Laos (72.2%).



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	
	2025	2026	2025	2026	2025	2026	2025	2026	2025	2026	2025	2026	2025	2026	2025	2026	2025	2026
ASEAN	14.8%	13.2%	0.9%	1.8%	56.4%	55.9%	2.6%	3.0%	1.9%	1.5%	5.5%	7.1%	1.5%	1.5%	15.4%	15.3%	1.0%	0.7%
BN	16.1%	10.3%	0.7%	2.6%	51.7%	56.8%	2.0%	2.6%	3.4%	2.6%	9.4%	10.3%	4.0%	0.6%	11.4%	12.9%	1.3%	1.3%
KH	11.0%	8.0%	1.7%	3.0%	45.9%	55.5%	5.2%	8.0%	3.5%	3.0%	7.6%	7.5%	2.9%	1.5%	20.3%	13.5%	1.7%	0.0%
ID	27.8%	19.9%	0.8%	2.5%	56.0%	59.7%	1.2%	1.7%	0.4%	0.4%	4.8%	5.9%	0.4%	0.8%	8.3%	8.9%	0.4%	0.0%
LA	11.3%	11.6%	3.3%	4.5%	49.0%	48.4%	4.6%	6.5%	6.6%	2.6%	4.6%	5.8%	2.6%	1.3%	15.9%	17.4%	2.0%	1.9%
MY	13.8%	12.4%	0.8%	0.5%	69.6%	67.5%	0.8%	0.0%	0.4%	2.1%	3.3%	3.6%	0.8%	1.5%	9.6%	12.4%	0.8%	0.0%
MM	12.9%	7.4%	1.0%	1.6%	59.3%	58.7%	5.7%	5.3%	1.0%	2.6%	4.6%	7.9%	1.0%	1.6%	12.4%	12.2%	2.1%	2.6%
PH	18.4%	17.5%	0.0%	0.0%	36.9%	36.5%	1.0%	0.9%	0.0%	0.5%	11.7%	14.7%	1.0%	1.4%	30.6%	27.5%	0.5%	0.9%
SG	10.3%	13.8%	0.0%	0.8%	68.6%	58.9%	0.8%	1.2%	1.7%	1.6%	1.7%	3.3%	0.8%	0.4%	16.1%	19.1%	0.0%	0.8%
TH	6.6%	8.8%	0.5%	1.2%	70.9%	56.1%	2.0%	3.5%	0.5%	1.2%	5.1%	7.6%	1.0%	2.9%	11.7%	18.1%	1.5%	0.6%
TL	31.8%	17.9%	0.0%	1.5%	51.5%	59.7%	1.5%	0.0%	0.0%	0.0%	1.5%	7.5%	0.0%	3.0%	13.6%	10.4%	0.0%	0.0%
VN	20.0%	17.4%	0.0%	1.1%	56.1%	57.1%	2.6%	3.3%	1.3%	0.0%	2.6%	4.3%	0.0%	1.1%	17.4%	15.8%	0.0%	0.0%

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

265 respondents who chose the "ASEAN" option in Q22; 1120 respondents who chose the "China" option in Q22; 314 respondents 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	
	2025	2026	2025	2026	2025	2026	2025	2026	2025	2026	2025	2026
ASEAN	31.5%	37.5%	68.5%	62.5%	61.9%	55.4%	38.1%	44.6%	43.2%	53.8%	56.8%	46.2%
BN	4.2%	12.5%	95.8%	87.5%	49.4%	28.4%	50.6%	71.6%	52.9%	50.0%	47.1%	50.0%
KH	42.1%	25.0%	57.9%	75.0%	38.0%	35.1%	62.0%	64.9%	37.1%	29.6%	62.9%	70.4%
ID	22.9%	36.2%	77.1%	63.8%	58.9%	42.6%	41.1%	57.4%	47.6%	57.1%	52.4%	42.9%
LA	11.8%	27.8%	88.2%	72.2%	54.1%	46.7%	45.9%	53.3%	45.8%	48.1%	54.2%	51.9%
MY	24.2%	37.5%	75.8%	62.5%	53.3%	46.6%	46.7%	53.4%	52.2%	62.5%	47.8%	37.5%
MM	48.0%	42.9%	52.0%	57.1%	65.2%	50.5%	34.8%	49.5%	29.2%	43.5%	70.8%	56.5%
PH	31.6%	43.2%	68.4%	56.8%	76.3%	81.8%	23.7%	18.2%	30.2%	36.2%	69.8%	63.8%
SG	28.0%	29.4%	72.0%	70.6%	61.4%	57.2%	38.6%	42.8%	41.0%	61.7%	59.0%	38.3%
TH	53.8%	66.7%	46.2%	33.3%	85.6%	90.6%	14.4%	9.4%	69.6%	90.3%	30.4%	9.7%
TL	9.5%	41.7%	90.5%	58.3%	70.6%	47.5%	29.4%	52.5%	22.2%	57.1%	77.8%	42.9%
VN	48.4%	50.0%	51.6%	50.0%	77.0%	81.9%	23.0%	18.1%	25.9%	55.2%	74.1%	44.8%

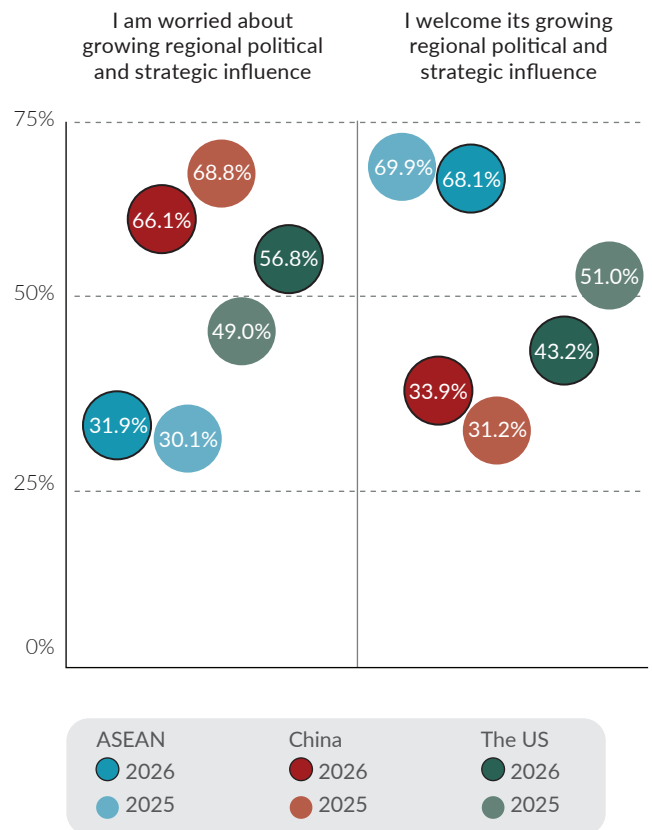
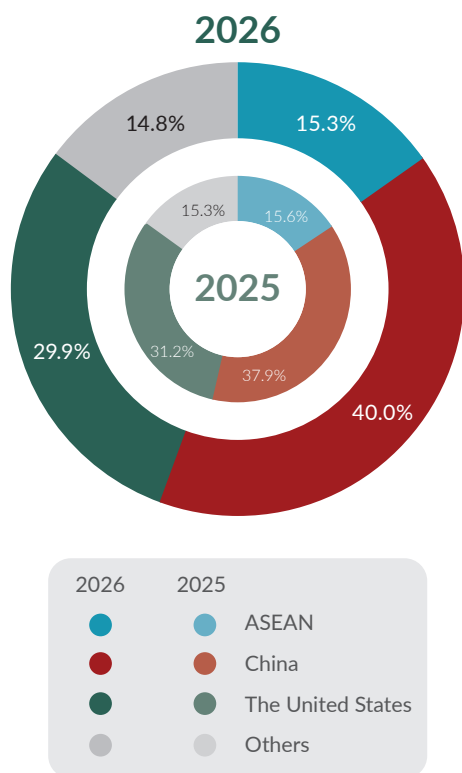
MOST INFLUENTIAL POLITICAL AND STRATEGIC POWER IN SOUTHEAST ASIA

China remains the most widely perceived political and strategic power in Southeast Asia, with 40.0% of ASEAN respondents identifying it as the most influential actor in the region, followed by the US (29.9%) and ASEAN itself (15.3%). This underscores that China and the US remain the two superpowers shaping the regional strategic environment. China is identified as the most influential political-strategic actor across nearly all ASEAN member states, except for Cambodia, the Philippines and Timor-Leste, where the US leads.

However, recognition of influence is accompanied by caution. A substantial 66.1% express concern over China’s growing political and strategic influence, compared to 33.9% who welcome it. Concern is particularly elevated in Vietnam (88.7%), the Philippines and Thailand (both at 87.5%), and Timor-Leste (80.0%). The US also generates considerable unease, with 56.8% worried about its growing influence. Apprehension toward US influence is especially pronounced in Thailand (88.3%), Indonesia (68.1%), Singapore (65.4%), Vietnam (62.2%), Malaysia (61.7%), and Timor-Leste (61.5%), suggesting that regional wariness towards major power rivalry extends to both superpowers.

Notably, ASEAN itself receives a far more positive assessment, with 68.1% welcoming its growing political and strategic influence. Support is especially strong in Laos (91.7%), Brunei (89.5%), Indonesia (76.9%), Malaysia (75.0%), and Singapore (73.7%). This reflects regional preference for ASEAN as a buffer and stabilising anchor amid intensifying major power competition.

In contrast, middle powers – including Japan (5.5%), the EU (4.2%), Australia (1.8%), India (1.6%), the Republic of Korea (1.2%), and the UK (0.5%) – register comparatively lower levels of perceived strategic influence. While these actors may be trusted and welcomed in other domains, they are not seen as decisive political-strategic shapers of the regional order. This suggests that Southeast Asia continues to view the regional balance primarily through a Sino-US lens, even as it diversifies partnerships to hedge against overdependence on either power.



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	
	2025	2026	2025	2026	2025	2026	2025	2026	2025	2026	2025	2026	2025	2026	2025	2026	2025	2026
ASEAN	15.6%	15.3%	1.2%	1.8%	37.9%	40.0%	3.8%	4.2%	2.3%	1.6%	3.8%	5.5%	2.9%	1.2%	31.2%	29.9%	1.3%	0.5%
BN	18.1%	12.3%	1.3%	2.6%	31.5%	36.8%	9.4%	5.2%	6.0%	5.2%	4.7%	4.5%	5.4%	1.9%	22.8%	30.3%	0.7%	1.3%
KH	9.9%	6.5%	1.7%	3.0%	35.5%	36.0%	2.9%	8.0%	6.4%	3.0%	5.8%	6.5%	3.5%	0.5%	31.4%	36.5%	2.9%	0.0%
ID	32.9%	27.5%	0.4%	1.3%	36.9%	43.2%	1.2%	3.0%	0.0%	0.4%	2.8%	3.4%	0.0%	1.3%	25.8%	19.9%	0.0%	0.0%
LA	10.6%	7.7%	2.6%	0.6%	33.8%	43.2%	7.9%	7.1%	4.0%	4.5%	6.0%	7.1%	5.3%	1.3%	27.2%	26.5%	2.6%	1.9%
MY	25.0%	20.6%	0.4%	2.1%	41.3%	43.8%	0.8%	2.1%	0.0%	1.0%	3.8%	2.6%	1.7%	3.1%	24.2%	24.2%	2.9%	0.5%
MM	8.2%	9.0%	3.6%	6.3%	41.2%	46.6%	4.1%	5.3%	4.1%	1.1%	4.6%	6.9%	3.1%	0.5%	28.9%	23.3%	2.1%	1.1%
PH	16.0%	17.5%	0.5%	0.0%	25.7%	26.5%	2.4%	1.4%	0.0%	0.5%	2.9%	11.4%	2.9%	1.4%	48.5%	40.8%	1.0%	0.5%
SG	13.2%	15.4%	0.8%	2.0%	40.9%	43.5%	2.1%	2.0%	0.8%	1.2%	3.3%	2.4%	1.2%	0.4%	37.2%	32.9%	0.4%	0.0%
TH	5.6%	12.3%	0.0%	0.6%	48.5%	37.4%	4.1%	6.4%	0.0%	0.0%	2.6%	5.3%	4.6%	2.3%	34.2%	35.1%	0.5%	0.6%
TL	21.2%	20.9%	6.1%	1.5%	39.4%	29.9%	1.5%	1.5%	0.0%	0.0%	1.5%	7.5%	0.0%	0.0%	30.3%	38.8%	0.0%	0.0%
VN	16.8%	19.0%	0.6%	0.0%	43.9%	52.7%	3.2%	4.3%	1.3%	0.5%	1.3%	2.7%	1.3%	0.5%	31.6%	20.1%	0.0%	0.0%

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

311 respondents who chose the "ASEAN" option in Q24; 815 respondents who chose the "China" option in Q24; 589 respondents who chose the "US" option in Q24

Country	ASEAN				China				The United States			
	I am worried about its growing regional political and strategic influence		I welcome its growing regional political and strategic influence		I am worried about its growing regional political and strategic influence		I welcome its growing regional political and strategic influence		I am worried about its growing regional political and strategic influence		I welcome its growing regional political and strategic influence	
	2025	2026	2025	2026	2025	2026	2025	2026	2025	2026	2025	2026
ASEAN	30.1%	31.9%	69.9%	68.1%	68.8%	66.1%	31.2%	33.9%	49.0%	56.8%	51.0%	43.2%
BN	3.7%	10.5%	96.3%	89.5%	51.1%	50.9%	48.9%	49.1%	47.1%	46.8%	52.9%	53.2%
KH	35.3%	46.2%	64.7%	53.8%	60.7%	43.1%	39.3%	56.9%	48.1%	38.4%	51.9%	61.6%
ID	26.5%	23.1%	73.5%	76.9%	63.4%	62.7%	36.6%	37.3%	75.4%	68.1%	24.6%	31.9%
LA	6.3%	8.3%	93.8%	91.7%	47.1%	56.7%	52.9%	43.3%	51.2%	51.2%	48.8%	48.8%
MY	23.3%	25.0%	76.7%	75.0%	64.6%	58.8%	35.4%	41.2%	63.8%	61.7%	36.2%	38.3%
MM	37.5%	35.3%	62.5%	64.7%	73.8%	54.5%	26.3%	45.5%	32.1%	36.4%	67.9%	63.6%
PH	33.3%	35.1%	66.7%	64.9%	83.0%	87.5%	17.0%	12.5%	34.0%	45.3%	66.0%	54.7%
SG	21.9%	26.3%	78.1%	73.7%	69.7%	57.0%	30.3%	43.0%	37.8%	65.4%	62.2%	34.6%
TH	63.6%	57.1%	36.4%	42.9%	83.2%	87.5%	16.8%	12.5%	65.7%	88.3%	34.3%	11.7%
TL	14.3%	35.7%	85.7%	64.3%	69.2%	80.0%	30.8%	20.0%	30.0%	61.5%	70.0%	38.5%
VN	50.0%	48.6%	50.0%	51.4%	91.2%	88.7%	8.8%	11.3%	34.7%	62.2%	65.3%	37.8%

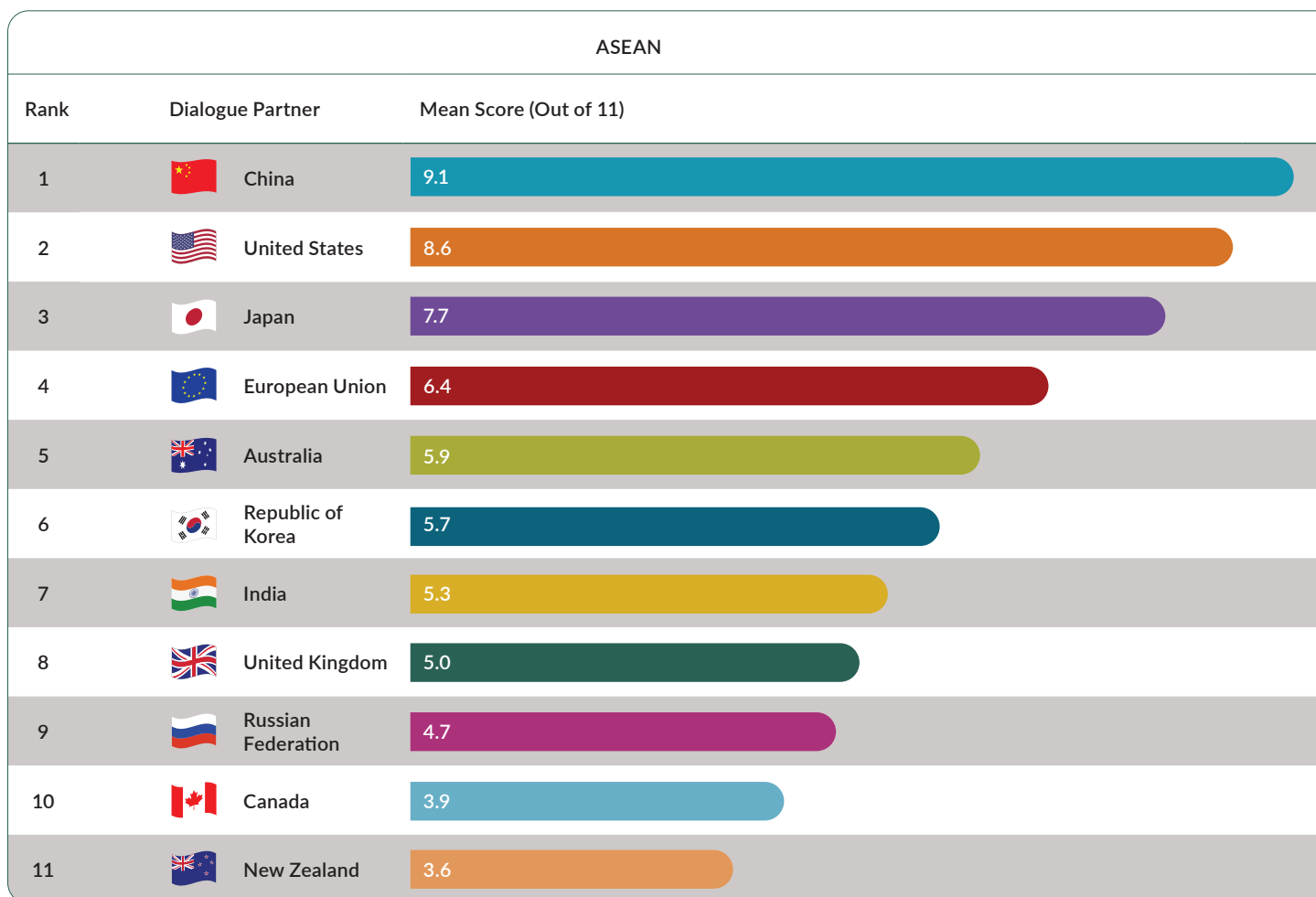
DIALOGUE PARTNERS' STRATEGIC RELEVANCE TO ASEAN

As in previous editions of the survey, China and the US remain firmly in the top two positions, followed by Japan in third place. However, this year's findings reveal a slightly wider gap between China (mean score 9.1) and the US (8.6), suggesting that perceptions of Beijing's strategic relevance have strengthened relative to Washington over the past year.

China is ranked first by the majority of ASEAN member states, including Brunei, Cambodia, Indonesia, Laos, Malaysia, Myanmar, Singapore, and Timor-Leste. Even in countries where China is not ranked first, it remains within the top three. The broad consistency across mainland and maritime Southeast Asia underscores China's economic, political and geographic ties with the region.

The US remains a strong second overall partner and is ranked first by the Philippines and Thailand — both longstanding US treaty allies — underscoring the continued salience of alliance ties in shaping strategic perceptions. The US is also ranked first by Vietnam and second by most other ASEAN member states, reflecting broad recognition of its security role, economic weight and institutional presence in the region. While the gap with China has widened slightly this year, the US remains deeply embedded in Southeast Asia's strategic landscape.

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



Japan retains its steady third-place ranking, reflecting its long-standing credibility as a consistent and non-coercive partner. Across all ASEAN member states, Japan is ranked within the top three. This stability highlights Tokyo's deep institutional engagement with ASEAN, sustained development assistance, infrastructure financing and expanding security cooperation, all of which reinforce its reputation as a dependable middle power.

The EU remains fourth overall, followed by Australia. The EU's relatively strong showing reflects its normative appeal and role as a regulatory and economic partner. Australia maintains mid-tier relevance, ranking particularly well in Singapore and Timor-Leste, though its overall strategic weight remains secondary to the larger powers.

One notable shift this year is the swap in positions between the Republic of Korea and India, with the former edging ahead. The ROK's growing technology partnerships and expanded diplomatic outreach under successive administrations may have bolstered its profile. India, by contrast, continues to register uneven support. While ranked relatively higher in Brunei, Laos and Myanmar, it remains lower in several maritime Southeast Asian states, suggesting that its strategic engagement has yet to achieve uniform resonance across ASEAN.

The UK, Russian Federation, Canada, and New Zealand occupy the lower tiers, with relatively modest mean scores. The UK maintains middling relevance, while Russia's ranking reflects its constrained regional role amid global geopolitical tensions. Canada and New Zealand continue to be perceived as peripheral actors in ASEAN's strategic calculations.

Ranking Order by ASEAN member states

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

LEADERSHIP IN CHAMPIONING GLOBAL FREE TRADE

ASEAN remains in pole position with 25.5% of respondents having the most confidence in it to champion the global free trade agenda, just slightly higher than the 23.8% recorded in 2025. Indonesia (41.5%), Timor-Leste (38.8%), and Vietnam (37.5%) feel most strongly about this.

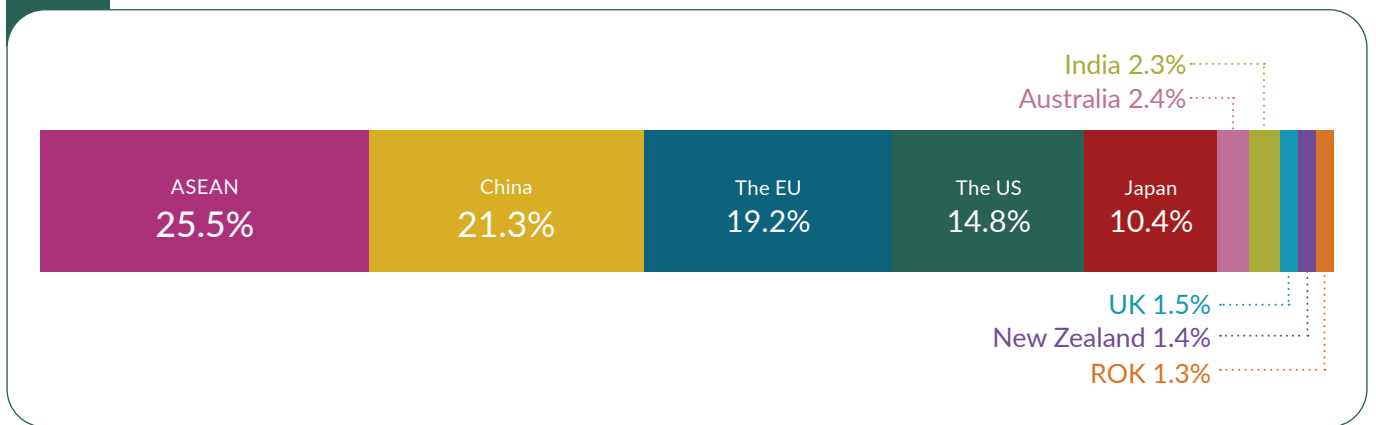
China maintains a steady share of ASEAN responses at 21.3%, most strongly seen in Malaysia (33.5%), Singapore (30.1%), and Brunei (27.7%), with Singapore recording the largest increase in share from the previous year in this regard.

Given the uncertainties in trade policy triggered by volatile tariff imposition decisions by the US administration over the past year, the softening of confidence towards the US as a champion of global free trade does not come as a surprise.

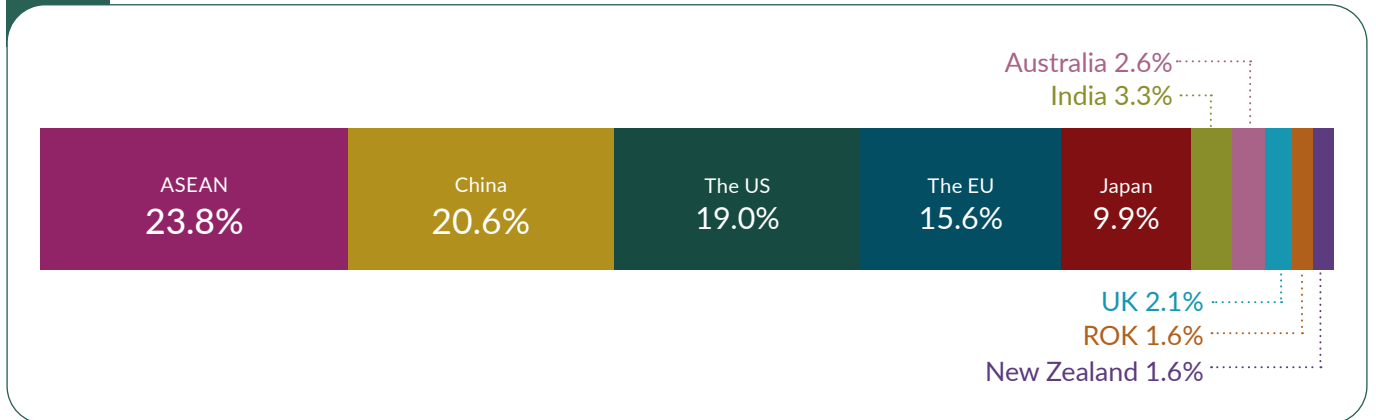
There is a decline in the share of respondents who shared this sentiment from 19.0% last year to 14.8% this year. ASEAN countries most positive on the US are Vietnam (24.5%), Myanmar (22.8%), and Cambodia (21.0%), though notably Vietnam also exhibits the most significant decline in its respondent share relative to the previous year.

Interestingly, the EU (19.2%) has overtaken the US as the third most cited country or region perceived as a champion of the global trade agenda, moderately higher than the 15.6% share recorded in 2025. Myanmar (29.1%), Cambodia (27.5%), and Laos (25.8%) are the most positive in this regard, with Laos showing the strongest increase in sentiments, rising 17.2 percentage points from the previous year.

2026



2025



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

2026

Country	ASEAN	Australia	China	The European Union	India	Japan	New Zealand	Republic of Korea	The United Kingdom	The United States
ASEAN	25.5%	2.4%	21.3%	19.2%	2.3%	10.4%	1.4%	1.3%	1.5%	14.8%
BN	14.2%	4.5%	27.7%	24.5%	3.9%	5.8%	2.6%	0.6%	3.2%	12.9%
KH	11.0%	5.0%	21.0%	27.5%	3.5%	9.0%	1.5%	0.0%	0.5%	21.0%
ID	41.5%	1.7%	26.3%	9.7%	0.0%	14.0%	0.8%	1.7%	0.0%	4.2%
LA	11.0%	3.9%	23.2%	25.8%	7.1%	9.7%	4.5%	1.3%	1.3%	12.3%
MY	35.1%	2.6%	33.5%	7.2%	1.5%	4.1%	1.0%	1.0%	1.5%	12.4%
MM	14.3%	1.6%	13.8%	29.1%	4.8%	9.5%	1.1%	1.1%	2.1%	22.8%
PH	28.9%	0.9%	9.5%	16.1%	0.0%	20.4%	0.9%	0.9%	2.4%	19.9%
SG	28.0%	2.4%	30.1%	18.7%	1.2%	11.0%	1.2%	0.4%	1.6%	5.3%
TH	19.9%	4.1%	15.8%	17.0%	1.2%	17.0%	0.6%	5.3%	3.5%	15.8%
TL	38.8%	0.0%	25.4%	13.4%	1.5%	9.0%	0.0%	0.0%	0.0%	11.9%
VN	37.5%	0.0%	7.6%	21.7%	0.5%	4.9%	1.1%	1.6%	0.5%	24.5%

2025

Country	ASEAN	Australia	China	The European Union	India	Japan	New Zealand	Republic of Korea	The United Kingdom	The United States
ASEAN	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%
TL	43.9%	1.5%	27.3%	9.1%	0.0%	3.0%	1.5%	1.5%	1.5%	10.6%
VN	26.5%	2.6%	6.5%	18.7%	1.9%	6.5%	0.0%	0.6%	0.0%	36.8%

LEADERSHIP IN MAINTAINING RULES-BASED ORDER AND UPHOLDING INTERNATIONAL LAW

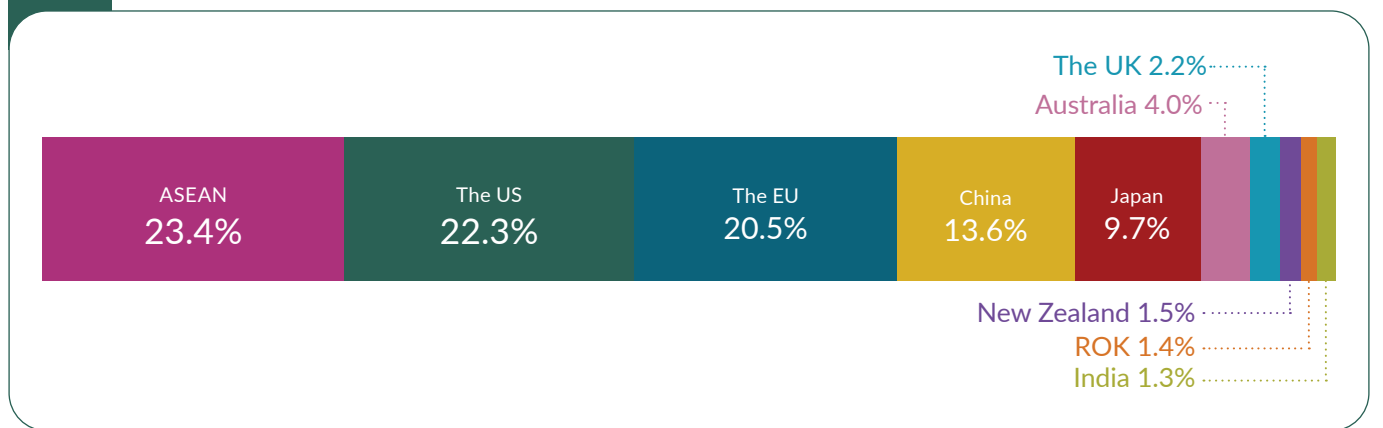
For the first time, ASEAN emerges as the actor in which respondents have the most confidence to uphold the rules-based order, edging ahead of the US. At the regional level, 23.4% place their confidence in ASEAN, compared to 22.3% for the US, while the EU follows closely at 20.5%. This marks a notable shift in perceptions of normative leadership in Southeast Asia.

Confidence in ASEAN is particularly strong in Indonesia (43.2%), Vietnam (38.6%), and Malaysia (33.5%), suggesting that larger member states continue to view ASEAN as a legitimate platform for managing the regional order. Even in countries where ASEAN does not rank first, it remains a consistently credible option across the region. This result reflects support for ASEAN's role as a convenor and stabilising mechanism amid intensifying major power competition.

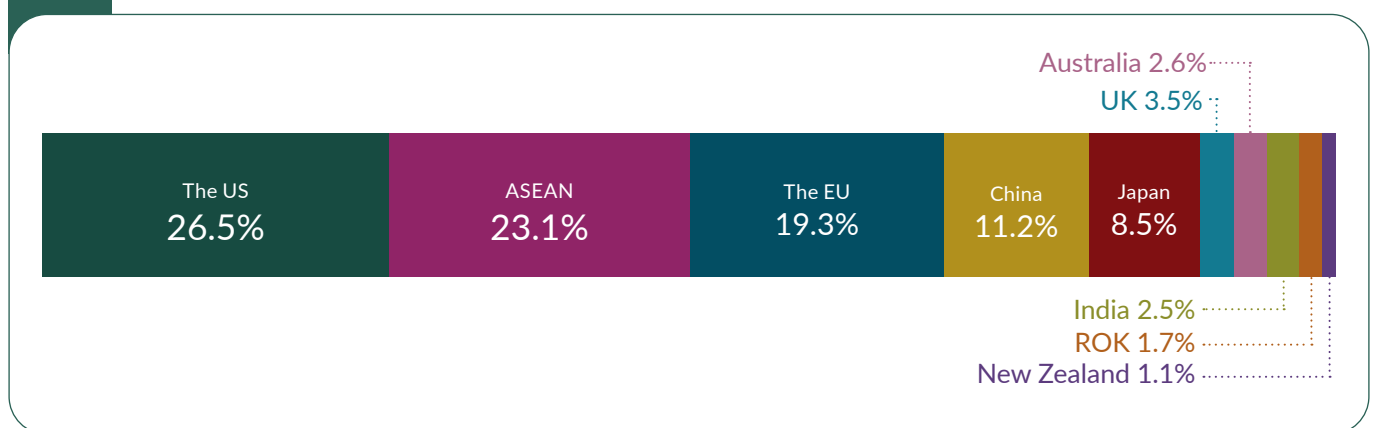
By contrast, while the US continues to register significant confidence levels – especially in Cambodia (39.5%), the Philippines (29.4%), and Timor-Leste (28.4%) – confidence in its leadership is more unevenly distributed across ASEAN member states. China, despite being perceived as the most influential political-strategic power in the previous question, garners only 13.6% regional confidence in maintaining the rules-based order, reinforcing the distinction respondents make between influence and normative leadership.

The EU performs strongly in this category (20.5%), particularly in Singapore (25.6%), Myanmar and Timor-Leste (both at 25.4%), underscoring its continued reputation as a defender of international law. Japan (9.7%) also retains moderate confidence levels.

2026



2025



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

2026

Country	ASEAN	Australia	China	The European Union	India	Japan	New Zealand	Republic of Korea	The United Kingdom	The United States
ASEAN	23.4%	4.0%	13.6%	20.5%	1.3%	9.7%	1.5%	1.4%	2.2%	22.3%
BN	18.1%	5.8%	16.1%	18.7%	1.9%	6.5%	2.6%	1.3%	6.5%	22.6%
KH	8.5%	4.0%	12.0%	19.0%	3.0%	7.5%	4.5%	1.5%	0.5%	39.5%
ID	43.2%	2.5%	17.4%	19.9%	0.4%	9.7%	0.8%	0.0%	1.7%	4.2%
LA	11.0%	10.3%	15.5%	20.6%	3.2%	12.3%	3.2%	0.6%	1.9%	21.3%
MY	33.5%	2.6%	19.6%	14.9%	1.5%	6.2%	0.5%	1.0%	2.6%	17.5%
MM	12.2%	4.8%	12.2%	25.4%	2.1%	12.2%	0.5%	1.1%	2.6%	27.0%
PH	27.5%	1.4%	4.3%	15.6%	0.0%	15.6%	1.9%	3.8%	0.5%	29.4%
SG	21.1%	3.3%	21.5%	25.6%	0.8%	8.1%	1.6%	1.2%	4.9%	11.8%
TH	18.7%	4.7%	14.6%	21.1%	1.2%	13.5%	1.2%	2.9%	0.6%	21.6%
TL	25.4%	3.0%	9.0%	25.4%	0.0%	6.0%	0.0%	1.5%	1.5%	28.4%
VN	38.6%	2.2%	7.6%	19.6%	0.5%	8.7%	0.0%	0.5%	0.5%	21.7%

2025

Country	ASEAN	Australia	China	The European Union	India	Japan	New Zealand	Republic of Korea	The United Kingdom	The United States
ASEAN	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%
TL	39.4%	4.5%	1.5%	19.7%	0.0%	0.0%	4.5%	1.5%	1.5%	27.3%
VN	26.5%	0.6%	3.9%	16.1%	2.6%	6.5%	0.0%	1.3%	0.6%	41.9%

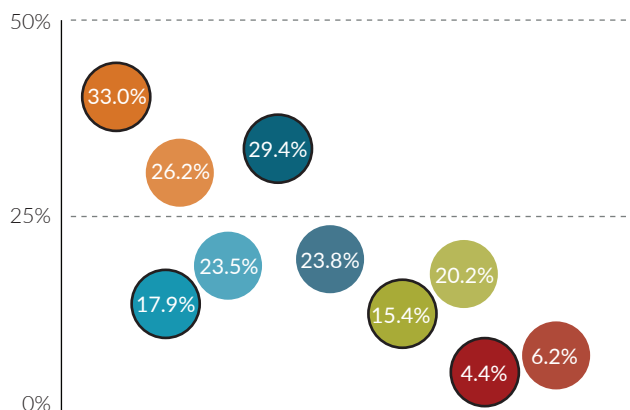
VIEWS ON THE EMERGENCE OF NEW INFORMAL GROUPINGS

Our respondents remain cautious about the rise of informal groupings outside of the United Nations (UN) framework. More than one-third of respondents (33.0%) believe that ASEAN should strengthen its convening power and normative influence to ensure member states remain committed and are discouraged from joining other groupings. The 6.8 percentage point increase in support of this option from last year aligns with earlier survey findings that places strong confidence in ASEAN to champion the global free trade agenda and promote a rules-based order. This is the top choice for all ASEAN member states, except for Singapore, Timor-Leste, and Thailand. Despite Indonesia's full membership of BRICS last year, it exhibits the strongest support (44.5%) for this option, followed by the Philippines (39.3%) and Laos (38.7%). Trailing closely behind is the view that ASEAN member states should be mindful of joining groupings that risk undermining ASEAN centrality at 29.4%, which is the top choice for Singapore (36.6%), Timor-Leste (32.8%), and Thailand (32.2%).

A notable proportion (17.9%) of respondents feel that ASEAN should join collectively as a grouping to pursue regional interests, although support for this option has declined from 23.5% in 2025. On the other

hand, nearly one-sixth (15.4%) of respondents prefer prioritising national interests over regional interests, with Timor-Leste expressing the strongest support for this view (23.9%).

Similar to last year, the option of refraining from joining any other groupings and focusing solely on ASEAN multilateralism ranks last, supported by only 4.4% of the regional respondents. This suggests a pragmatic preference for keeping options open amid the current geopolitical landscape that is characterised by uncertainty.



Q29 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	
	2025	2026	2025	2026	2025	2026	2025	2026	2025	2026
ASEAN	23.8%	29.4%	23.5%	17.9%	6.2%	4.4%	26.2%	33.0%	20.2%	15.4%
BN	27.5%	29.7%	21.5%	20.6%	7.4%	1.3%	28.9%	34.8%	14.8%	13.5%
KH	23.8%	30.5%	28.5%	11.5%	8.7%	6.0%	22.1%	37.0%	16.9%	15.0%
ID	24.2%	25.4%	12.7%	10.6%	4.0%	1.7%	40.9%	44.5%	18.3%	17.8%
LA	23.2%	31.6%	29.1%	14.8%	13.2%	3.9%	16.6%	38.7%	17.9%	11.0%
MY	25.0%	28.9%	20.4%	19.1%	2.9%	3.1%	26.3%	34.0%	25.4%	14.9%
MM	20.6%	23.8%	26.3%	17.5%	6.2%	10.1%	21.6%	29.1%	25.3%	19.6%
PH	26.2%	30.8%	23.3%	19.0%	4.4%	3.8%	34.5%	39.3%	11.7%	7.1%
SG	28.5%	36.6%	26.4%	22.8%	4.1%	2.4%	16.1%	22.0%	24.8%	16.3%
TH	29.1%	32.2%	15.3%	19.3%	6.6%	5.3%	26.5%	28.7%	22.4%	14.6%
TL	34.8%	32.8%	22.7%	14.9%	1.5%	7.5%	18.2%	20.9%	22.7%	23.9%
VN	10.3%	20.7%	31.6%	27.2%	4.5%	3.3%	29.0%	33.7%	24.5%	15.2%

SECTION IV

US-China Rivalry and its Impact on Southeast Asia

47-58

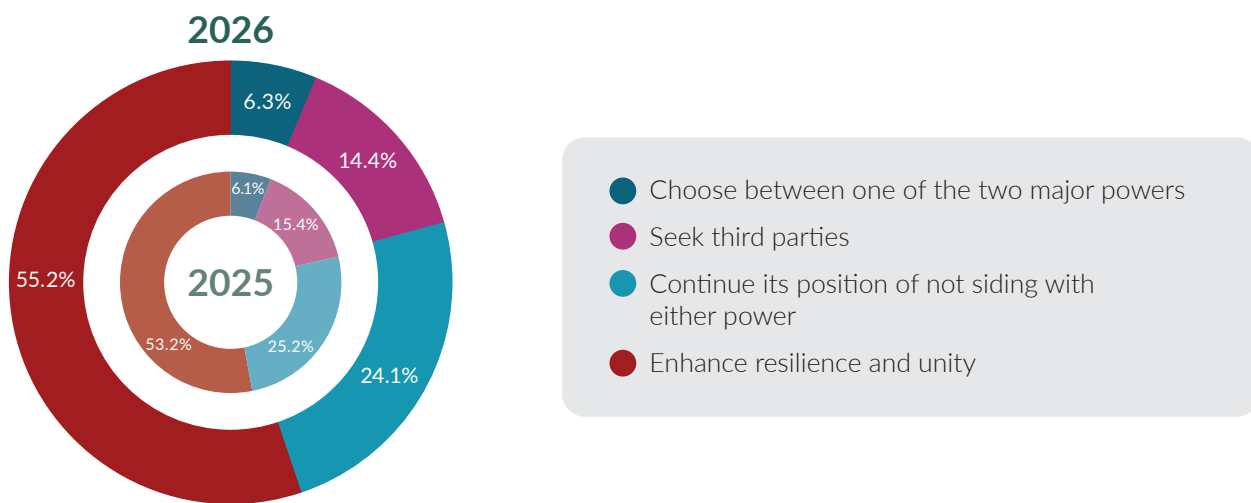
This section examines ASEAN's sentiments and options in the unfolding power competition in the region, especially the deepening rivalry between China and the United States.

ASSESSING ASEAN'S OPTIONS

Consistent with previous years, our respondents overwhelmingly reject the notion that neutrality is no longer viable. A clear majority (55.2%) believe ASEAN should enhance its resilience and unity to fend off pressure from the two major powers, reinforcing the region's continued preference to strengthen the organisation rather than external alignment. This position is particularly strong in Thailand (68.4%), the Philippines (66.8%), Vietnam (64.1%), and Indonesia (58.1%), indicating broad support across both mainland and maritime Southeast Asia for strengthening ASEAN cohesion as the primary response to intensifying US-China rivalry.

A further 24.1% believe ASEAN should continue its position of not siding with either China or the US, underscoring that strategic autonomy remains a core instinct. Only 6.3% think ASEAN must choose between the two major powers, suggesting that forced alignment remains an unpopular and unlikely option in regional thinking.

Seeking out "third parties" to broaden strategic space registers moderate support at 14.4%, with relatively higher interest in Singapore (19.4%), Timor-Leste (19.4%), and Vietnam (17.9%). This indicates openness to diversification, but not at the expense of ASEAN unity.



Q30 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	
	2025	2026	2025	2026	2025	2026	2025	2026
ASEAN	6.1%	6.3%	15.4%	14.4%	25.2%	24.1%	53.2%	55.2%
BN	8.1%	11.6%	11.4%	9.7%	27.5%	24.5%	53.0%	54.2%
KH	9.3%	12.0%	19.8%	12.0%	23.8%	21.0%	47.1%	55.0%
ID	1.6%	3.4%	8.7%	8.9%	29.4%	29.7%	60.3%	58.1%
LA	9.9%	9.7%	19.2%	14.8%	26.5%	20.0%	44.4%	55.5%
MY	4.2%	4.1%	8.3%	16.5%	32.9%	27.3%	54.6%	52.1%
MM	8.2%	10.6%	19.1%	12.2%	29.9%	34.9%	42.8%	42.3%
PH	8.3%	8.1%	10.7%	10.9%	17.5%	14.2%	63.6%	66.8%
SG	2.5%	1.6%	19.4%	19.5%	31.4%	35.8%	46.7%	43.1%
TH	3.6%	2.3%	19.4%	17.0%	13.3%	12.3%	63.8%	68.4%
TL	7.6%	1.5%	6.1%	19.4%	31.8%	31.3%	54.5%	47.8%
VN	5.8%	4.3%	18.1%	17.9%	20.0%	13.6%	56.1%	64.1%

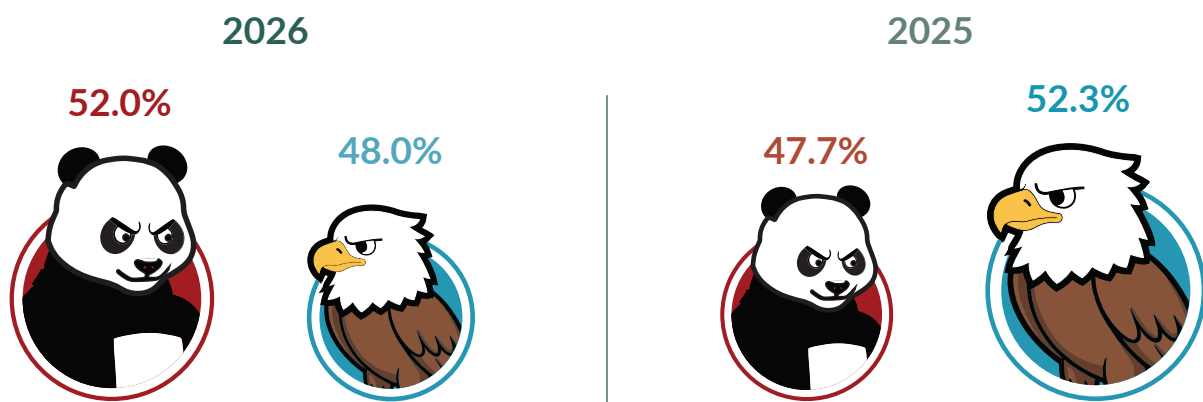
ASEAN'S FUTURE: CHINA OR THE UNITED STATES?

When presented with a hypothetical forced choice between the two strategic rivals, a slim majority of respondents (52.0%) select China over the US (48.0%). This marks a shift from last year, when the US held a narrow lead, and represents a swing back toward China, which had been the preferred option in the preceding year. The results underscore how finely balanced regional sentiment remains, with relatively small margins separating the two superpowers across successive editions of the survey.

Support for China is particularly strong in Indonesia (80.1%), Malaysia (68.0%), Singapore (66.3%), Timor-Leste (58.2%), Thailand (55.0%), and Brunei (53.5%). In contrast,

the US retains clear preference in the Philippines (76.8%), Myanmar (61.4%), Cambodia (61.0%), and Vietnam (59.2%), while Laos is almost evenly split.

The results suggest that while respondents continue to favour neutrality in principle, structural and economic realities may shape alignment preferences if compelled to choose. Countries with deep economic interdependence with China appear more inclined toward Beijing, whereas traditional security partners of the US, particularly the Philippines, remain firmly aligned with Washington. The relatively narrow regional margin (52–48) reflects a deeply divided strategic landscape rather than a decisive shift toward one pole.



Q31 If ASEAN were forced to align itself with one of the strategic rivals, which should it choose?

Country	China		The United States	
	2025	2026	2025	2026
ASEAN	47.7%	52.0%	52.3%	48.0%
BN	55.0%	53.5%	45.0%	46.5%
KH	43.0%	39.0%	57.0%	61.0%
ID	72.2%	80.1%	27.8%	19.9%
LA	51.0%	49.7%	49.0%	50.3%
MY	70.8%	68.0%	29.2%	32.0%
MM	42.3%	38.6%	57.7%	61.4%
PH	13.6%	23.2%	86.4%	76.8%
SG	47.1%	66.3%	52.9%	33.7%
TH	55.6%	55.0%	44.4%	45.0%
TL	40.9%	58.2%	59.1%	41.8%
VN	26.5%	40.8%	73.5%	59.2%

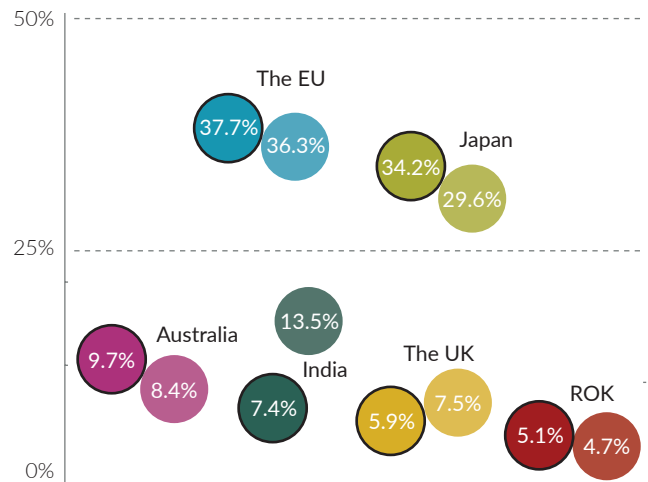
BROADENING ASEAN'S STRATEGIC OPTIONS

Consistent with previous years, the EU (37.7%) and Japan (34.2%) remain ASEAN's two most preferred and trusted "third-party" strategic partners. The EU retains a slight lead at the regional level, reinforcing its reputation as a normative and economic partner that is less entangled in hard security rivalry. Support for the EU is particularly strong in Vietnam (52.7%), Timor-Leste (49.3%), and Indonesia (40.7%), suggesting continued confidence in Europe's commitment to international law and multilateralism.

Japan remains a close second and continues to perform strongly across ASEAN. It ranks first in several countries, including the Philippines (44.1%), Myanmar (39.7%), and Brunei (38.7%). Japan's sustained credibility reflects its long-standing economic engagement, development cooperation and perception as a reliable and non-coercive partner.

Australia (9.7%), India (7.4%), the United Kingdom (5.9%), and the Republic of Korea (5.1%) trail at some distance. While India has previously featured more prominently in

discussions of Indo-Pacific balancing, its relatively modest regional preference this year suggests that respondents may not yet view New Delhi as a decisive strategic hedge in comparison to the EU or Japan.



Q32 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	
	2025	2026	2025	2026	2025	2026	2025	2026	2025	2026	2025	2026
ASEAN	8.4%	9.7%	36.3%	37.7%	13.5%	7.4%	29.6%	34.2%	4.7%	5.1%	7.5%	5.9%
BN	13.4%	5.8%	24.8%	30.3%	16.8%	10.3%	24.8%	38.7%	7.4%	4.5%	12.8%	10.3%
KH	8.7%	6.5%	35.5%	38.0%	11.6%	13.0%	30.2%	37.5%	5.8%	1.5%	8.1%	3.5%
ID	7.9%	9.3%	42.5%	40.7%	11.5%	3.4%	29.8%	37.3%	5.6%	8.5%	2.8%	0.8%
LA	6.6%	8.4%	29.8%	36.1%	25.2%	16.1%	20.5%	28.4%	7.9%	5.8%	9.9%	5.2%
MY	6.7%	12.9%	31.7%	33.0%	10.0%	5.7%	35.4%	32.0%	6.7%	7.2%	9.6%	9.3%
MM	11.3%	9.0%	39.2%	30.7%	18.0%	11.1%	22.2%	39.7%	3.6%	3.7%	5.7%	5.8%
PH	6.8%	8.1%	34.0%	29.9%	4.4%	1.9%	42.7%	44.1%	1.9%	3.8%	10.2%	12.3%
SG	9.1%	17.5%	30.2%	39.4%	14.0%	6.1%	35.1%	28.0%	4.1%	4.5%	7.4%	4.5%
TH	8.2%	7.6%	39.8%	35.1%	11.7%	4.1%	29.6%	35.1%	3.1%	10.5%	7.7%	7.6%
TL	30.3%	17.9%	36.4%	49.3%	9.1%	1.5%	18.2%	25.4%	1.5%	3.0%	4.5%	3.0%
VN	5.2%	3.3%	55.5%	52.7%	11.6%	8.2%	25.2%	30.4%	1.3%	3.3%	1.3%	2.2%

THE FUTURE OF CHINA'S RELATIONS WITH REGIONAL COUNTRIES

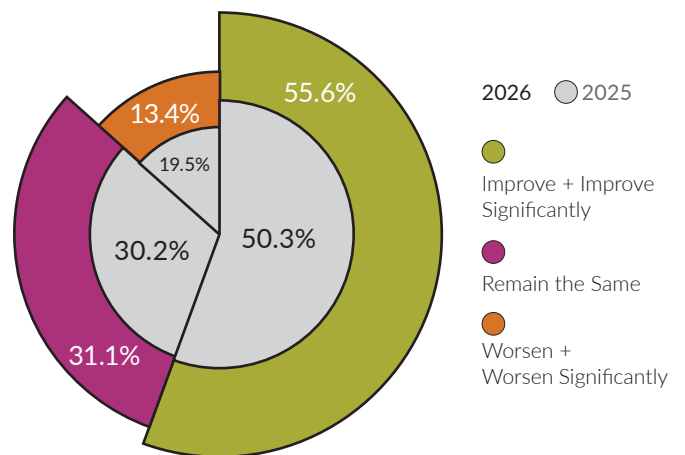
Expectations of improvement in relations with China are gaining ground across ASEAN. A majority of respondents (55.6%) believe their country's relations with China will improve or improve significantly over the next three years, compared to 31.1% who expect relations to remain the same and only 13.4% who anticipate deterioration. This marks a generally optimistic outlook toward bilateral trajectories with Beijing, despite persistent strategic tensions in parts of the region.

Confidence in improving ties is particularly strong in Timor-Leste (89.6%), Laos (68.4%), Indonesia (66.1%), Brunei (65.2%), Malaysia (61.9%), and Cambodia (60.0%). These results suggest that China continues to be seen as an indispensable partner whose influence is expected to remain constructive or at least manageable.

At the same time, the data reveal clear divergences within ASEAN. The Philippines is the notable outlier: a majority (55.0%) foresee relations worsening or worsening significantly, while only 19.4% expect improvement. This reflects continuing maritime frictions and tensions in the South China Sea. Myanmar also shows higher levels of pessimism (20.1%), while Vietnam presents a more cautious outlook, with 40.8% expecting relations to remain the same

and 15.8% foreseeing deterioration, indicating guarded pragmatism rather than enthusiasm.

Singapore and Thailand display more mixed expectations, with sizeable proportions anticipating stability rather than clear improvement. This suggests a view that while relations with China are unlikely to deteriorate sharply, they may not deepen dramatically either.



Q33 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	
	2025	2026	2025	2026	2025	2026	2025	2026	2025	2026
ASEAN	6.1%	3.4%	13.4%	10.0%	30.2%	31.1%	35.2%	41.8%	15.1%	13.8%
BN	1.3%	0.0%	8.1%	3.9%	31.5%	31.0%	38.3%	58.7%	20.8%	6.5%
KH	4.7%	1.5%	11.0%	9.0%	25.0%	29.5%	38.4%	42.0%	20.9%	18.0%
ID	1.6%	1.3%	3.2%	3.0%	27.4%	29.7%	47.2%	56.4%	20.6%	9.7%
LA	1.3%	0.6%	9.9%	5.8%	19.9%	25.2%	41.1%	49.0%	27.8%	19.4%
MY	0.8%	1.0%	6.7%	4.1%	28.8%	33.0%	44.2%	45.4%	19.6%	16.5%
MM	14.9%	9.0%	20.6%	11.1%	29.9%	31.2%	23.7%	37.6%	10.8%	11.1%
PH	26.2%	14.2%	39.8%	40.8%	21.4%	25.6%	10.2%	18.5%	2.4%	0.9%
SG	1.2%	1.6%	5.8%	9.3%	47.1%	45.9%	38.4%	33.7%	7.4%	9.3%
TH	1.5%	1.2%	14.3%	10.5%	29.6%	42.7%	40.8%	30.4%	13.8%	15.2%
TL	6.1%	3.0%	0.0%	0.0%	24.2%	7.5%	48.5%	49.3%	21.2%	40.3%
VN	7.1%	3.8%	14.2%	12.0%	41.9%	40.8%	29.7%	39.1%	7.1%	4.3%

Q33A What could potentially worsen your positive impression of China? (Choose 1 response)

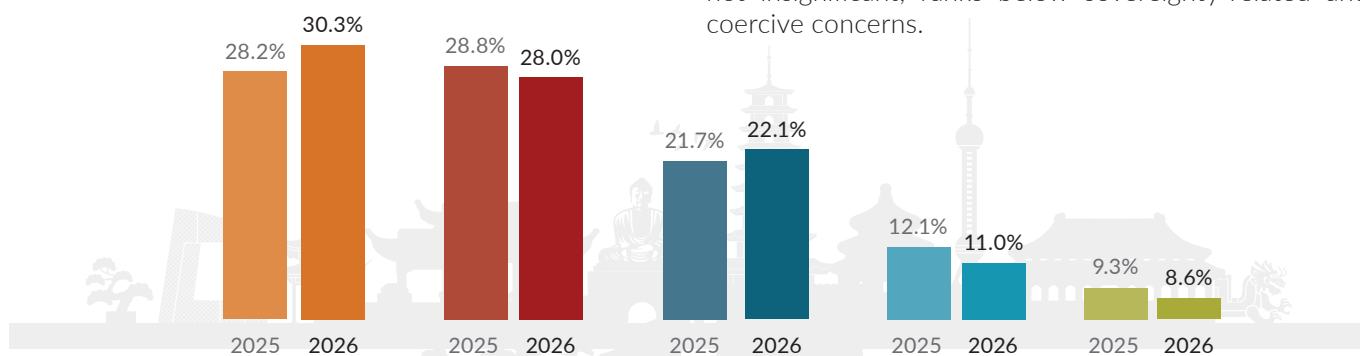
China's interference in domestic affairs of ASEAN member states emerges as the top concern across ASEAN (30.3%), narrowly ahead of China's strong-arm tactics in the South China Sea and the Mekong (28.0%). Concerns over economic coercion through trade and tourism rank third (22.1%), while issues related to China's treatment of minorities and its handling of Hong Kong (11.0%) and Taiwan (8.6%) remain comparatively less salient.

The prominence of domestic interference suggests that anxieties are increasingly internal rather than purely geopolitical. Myanmar (44.6%), Indonesia (42.3%), Laos (35.8%), Thailand (33.3%), and Singapore (31.1%) register particularly high concern over influence operations, including through social media and perceived outreach to ethnic Chinese communities. This points to heightened sensitivity around sovereignty, political autonomy and information integrity, especially in an era of digital penetration and polarised domestic politics.

At the same time, maritime and territorial pressures remain deeply consequential for claimant states. The Philippines (43.9%), Vietnam (43.8%), and Brunei (40.6%) cite strong-arm tactics in the South China Sea as the key factor that could worsen perceptions, reflecting ongoing frictions at sea.

Economic coercion registers strongly in Thailand (37.2%) and Timor-Leste (35.0%), and remains notable in Cambodia (27.5%) and Singapore (25.5%). This reflects awareness of how trade, tourism and investment flows may be leveraged in response to foreign policy disagreements.

Interestingly, concerns over a forceful reunification with Taiwan remain relatively low across most member states, suggesting that while cross-Strait tensions are watched closely, they are not perceived as the most immediate factor shaping impressions of China. Similarly, China's treatment of minorities and Hong Kong, though not insignificant, ranks below sovereignty-related and coercive concerns.



1060 respondents who chose the "Improve" and "Improve Significantly" options in Q33

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	
	2025	2026	2025	2026	2025	2026	2025	2026	2025	2026
ASEAN	21.7%	22.1%	12.1%	11.0%	28.8%	28.0%	28.2%	30.3%	9.3%	8.6%
BN	18.2%	16.8%	20.5%	10.9%	29.5%	40.6%	19.3%	17.8%	12.5%	13.9%
KH	21.6%	27.5%	17.6%	10.0%	20.6%	25.0%	31.4%	26.7%	8.8%	10.8%
ID	20.5%	12.2%	14.6%	10.9%	21.1%	28.8%	36.3%	42.3%	7.6%	5.8%
LA	19.2%	17.0%	16.3%	6.6%	29.8%	36.8%	26.0%	35.8%	8.7%	3.8%
MY	25.5%	20.0%	15.0%	16.7%	24.2%	30.0%	26.8%	22.5%	8.5%	10.8%
MM	28.4%	15.2%	16.4%	15.2%	20.9%	19.6%	26.9%	44.6%	7.5%	5.4%
PH	19.2%	19.5%	7.7%	2.4%	46.2%	43.9%	19.2%	26.8%	7.7%	7.3%
SG	16.2%	25.5%	5.4%	14.2%	24.3%	14.2%	42.3%	31.1%	11.7%	15.1%
TH	37.4%	37.2%	5.6%	14.1%	16.8%	10.3%	29.0%	33.3%	11.2%	5.1%
TL	47.8%	35.0%	15.2%	11.7%	10.9%	15.0%	17.4%	28.3%	8.7%	10.0%
VN	10.5%	17.5%	1.8%	8.8%	54.4%	43.8%	24.6%	23.8%	8.8%	6.3%

Q33B What can China do to improve relations with your country?

(Choose 1 response)

Similar to findings in previous editions of the survey, ASEAN's expectations of China remain anchored in respect for international law, sovereignty and equitable economic engagement. At the ASEAN level, the top response is that China should resolve all territorial and maritime disputes peacefully in accordance with international law (35.1%), followed by respecting sovereignty and not constraining foreign policy choices (25.5%), and making trade more mutually beneficial (20.1%). Deepening people-to-people relations ranks fourth (16.9%), while very few respondents (2.3%) believe that fault lines with China are unbridgeable.

Maritime and territorial concerns are especially pronounced among claimant states. The Philippines (76.7%), Vietnam (55.2%) and Malaysia (50.0%) prioritise resolving territorial and maritime disputes peacefully in accordance with international law. Timor-Leste (50.0%), though not a claimant state in the South China Sea also ranks this option highest, signalling that legal and rules-based approaches remain central to how ASEAN stakeholders assess China's regional role.

In contrast, some member states place greater emphasis on sovereignty and non-interference. Timor-Leste (50.0%) and Myanmar (39.5%) lead in calling for China to respect domestic autonomy and refrain from constraining foreign policy choices, while Brunei (33.3%) and Thailand (30.0%) also rank this concern prominently. This aligns with broader anxieties, reflected in earlier questions, about external influence and political autonomy.

Economic considerations are particularly salient in Indonesia (50.0%) and Thailand (45.0%), where respondents prioritise more balanced trade ties. Singapore's responses are more evenly distributed across trade, dispute resolution, sovereignty, and people-to-people ties, reflecting its multifaceted relationship with China.

Interestingly, Cambodia and Brunei place strong emphasis on enhancing people-to-people relations, suggesting that in countries where bilateral ties are relatively stable, soft connectivity remains a preferred pathway for strengthening relations.

Resolve all territorial and maritime disputes peacefully in accordance with international law



Respect my country's sovereignty and not constrain my country's foreign policy choices



Make bilateral trade truly mutually beneficial by addressing trade imbalances



289 respondents who chose the "Worsen" and "Worsen Significantly" options in Q33

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	
	2025	2026	2025	2026	2025	2026	2025	2026	2025	2026
ASEAN	33.1%	35.1%	18.2%	20.1%	17.9%	16.9%	28.1%	25.5%	2.7%	2.3%
BN	14.3%	16.7%	0.0%	0.0%	42.9%	50.0%	42.9%	33.3%	0.0%	0.0%
KH	18.5%	19.0%	29.6%	14.3%	22.2%	42.9%	29.6%	23.8%	0.0%	0.0%
ID	50.0%	40.0%	25.0%	50.0%	16.7%	0.0%	8.3%	10.0%	0.0%	0.0%
LA	17.6%	20.0%	11.8%	20.0%	29.4%	40.0%	35.3%	20.0%	5.9%	0.0%
MY	50.0%	50.0%	16.7%	20.0%	16.7%	10.0%	16.7%	20.0%	0.0%	0.0%
MM	8.7%	21.1%	11.6%	21.1%	11.6%	7.9%	63.8%	39.5%	4.3%	10.5%
PH	72.1%	76.7%	5.9%	7.8%	2.9%	0.0%	16.9%	14.7%	2.2%	0.9%
SG	29.4%	22.2%	23.5%	29.6%	17.6%	22.2%	23.5%	22.2%	5.9%	3.7%
TH	9.7%	15.0%	48.4%	45.0%	16.1%	10.0%	25.8%	30.0%	0.0%	0.0%
TL	0.0%	50.0%	50.0%	0.0%	50.0%	0.0%	0.0%	50.0%	0.0%	0.0%
VN	60.6%	55.2%	9.1%	13.8%	3.0%	3.4%	18.2%	17.2%	9.1%	10.3%

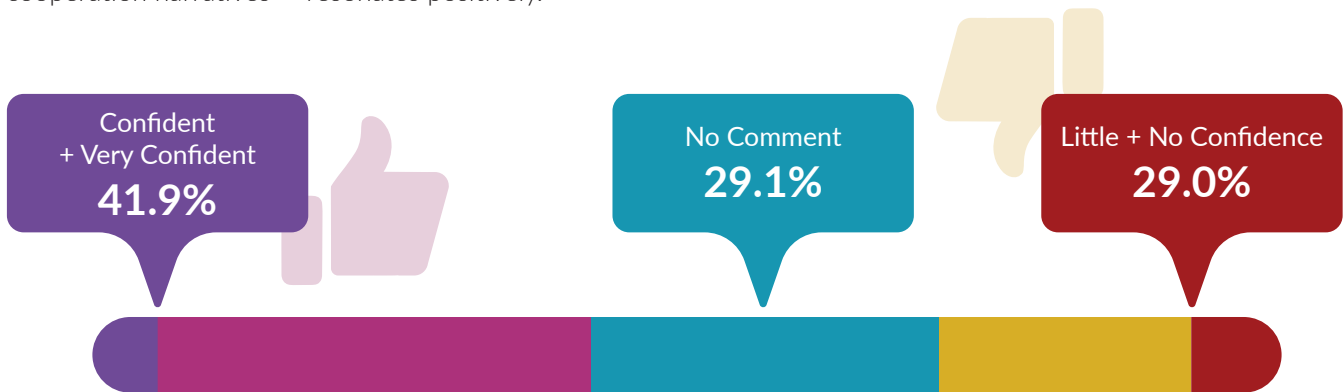
CHINA AS A STRATEGIC LEADER OF THE GLOBAL SOUTH

Perceptions of China as a strategic leader of the Global South reveal a cautiously positive but far from overwhelming endorsement across ASEAN. At the ASEAN level, 41.9% of respondents express confidence or strong confidence in China’s leadership role, while 29.0% indicate little or no confidence and 29.1% opt for no comment. The relatively high proportion of non-committal responses suggests that the concept of “Global South leadership” remains politically sensitive and not uniformly defined across the region.

Support is strongest in Laos (61.9%), Brunei (58.7%), Cambodia (52.0%), and Malaysia (44.3%). These figures indicate that among some ASEAN member states, China’s positioning as a representative voice for developing countries – through platforms such as BRICS expansion, development financing initiatives and South-South cooperation narratives – resonates positively.

By contrast, confidence is more limited in the Philippines (18.5%) and Vietnam (22.9%), which register higher levels of scepticism. In the Philippines, 54.1% express little or no confidence, the highest level of distrust in ASEAN. Vietnam likewise shows elevated scepticism (34.7%) and a high “no comment” response (42.4%), suggesting caution rather than endorsement. These findings reflect how maritime disputes and strategic competition continue to shape broader perceptions of China’s global leadership claims.

The substantial “no comment” figures in Vietnam (42.4%), Timor-Leste (40.3%), and Singapore (32.1%) suggest that many respondents may be withholding judgment, possibly due to uncertainties about how China’s Global South leadership would translate into concrete regional benefits.



Q34 How confident are you of China as a strategic leader of the Global South?

Country	Very Confident	Confident	No Comment	Little Confidence	No Confidence
ASEAN	5.5%	36.4%	29.1%	21.3%	7.7%
BN	7.7%	51.0%	18.7%	21.9%	0.6%
KH	4.5%	47.5%	25.5%	22.0%	0.5%
ID	3.8%	38.6%	26.3%	23.7%	7.6%
LA	9.0%	52.9%	23.9%	12.3%	1.9%
MY	4.6%	39.7%	27.3%	21.6%	6.7%
MM	5.8%	37.0%	27.0%	17.5%	12.7%
PH	0.5%	18.0%	27.5%	31.8%	22.3%
SG	7.3%	34.1%	32.1%	19.9%	6.5%
TH	9.4%	29.2%	28.7%	21.6%	11.1%
TL	6.0%	31.3%	40.3%	20.9%	1.5%
VN	2.2%	20.7%	42.4%	21.7%	13.0%

THE FUTURE OF THE UNITED STATES' RELATIONS WITH REGIONAL COUNTRIES

Expectations regarding relations with the US under the Trump 2.0 administration reveal a more cautious and uncertain outlook across ASEAN. At the regional level, 37.7% believe relations will remain the same, making this the predominant view. A combined 32.8% expect relations to improve or improve significantly, while 29.5% foresee deterioration. Compared to last year, optimism appears to have softened, with fewer respondents anticipating clear improvement and more adopting a wait-and-see posture.

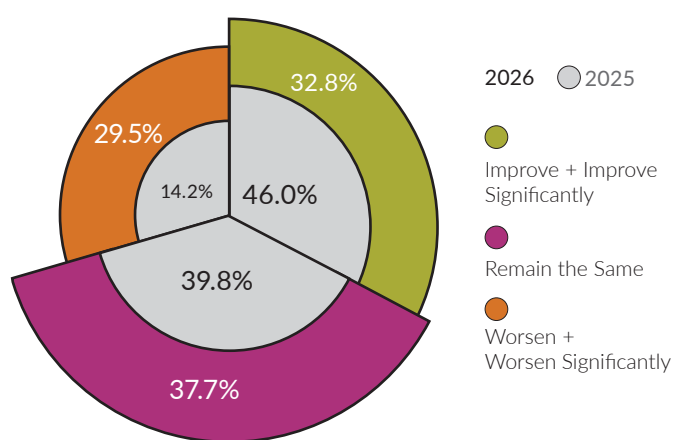
The “remain the same” response is particularly pronounced in Timor-Leste (59.7%), Indonesia (49.6%), the Philippines (47.9%), and Singapore (43.5%). This suggests that many stakeholders expect continuity rather than dramatic shifts, perhaps reflecting an assessment that institutional ties, defence cooperation and economic linkages will endure despite rhetorical volatility or tariff measures.

At the same time, concerns about worsening relations are notable in several countries. Thailand (47.4%) and Singapore (43.5%) register relatively high pessimism, while Indonesia (35.2%) and Malaysia (30.4%) also show significant apprehension. These views may be shaped by uncertainty over trade policies, sanctions and the broader implications of unilateral economic measures.

Conversely, Cambodia (55.5%), Vietnam (53.8%), Laos (43.9%), and Myanmar (40.7%) display stronger

expectations of improvement. In Vietnam's case, deepening strategic cooperation and shared concerns over regional security may underpin optimism. Cambodia's positive outlook may reflect recent diplomatic recalibration and expectations of more transactional engagement.

The Philippines presents a more balanced picture: while 30.3% anticipate improvement, nearly half expect relations to remain stable. Given its status as a treaty ally, this suggests confidence in the resilience of the alliance framework even amid policy shifts.



Q35 How do you see your country's relations with the United States evolving during the Trump 2.0 Administration?

Country	Worsen Significantly		Worsen		Remain the Same		Improve		Improve Significantly	
	2025	2026	2025	2026	2025	2026	2025	2026	2025	2026
ASEAN	1.7%	7.1%	12.5%	22.4%	39.8%	37.7%	34.3%	27.2%	11.7%	5.6%
BN	1.3%	7.7%	10.1%	18.1%	39.6%	36.8%	37.6%	33.5%	11.4%	3.9%
KH	1.7%	1.0%	9.3%	15.5%	32.0%	28.0%	41.9%	44.5%	15.1%	11.0%
ID	2.4%	4.7%	16.7%	30.5%	54.4%	49.6%	22.6%	13.1%	4.0%	2.1%
LA	1.3%	18.1%	7.9%	18.7%	25.2%	19.4%	54.3%	35.5%	11.3%	8.4%
MY	3.8%	6.7%	21.3%	23.7%	50.0%	37.6%	20.0%	27.3%	5.0%	4.6%
MM	2.1%	6.9%	9.8%	20.6%	40.7%	31.7%	34.0%	32.8%	13.4%	7.9%
PH	1.0%	3.8%	7.3%	18.0%	40.3%	47.9%	35.4%	25.1%	16.0%	5.2%
SG	1.7%	10.6%	16.9%	32.9%	57.4%	43.5%	20.2%	11.4%	3.7%	1.6%
TH	0.0%	7.0%	18.4%	40.4%	41.3%	28.7%	30.1%	18.7%	10.2%	5.3%
TL	0.0%	10.4%	1.5%	14.9%	36.4%	59.7%	43.9%	11.9%	18.2%	3.0%
VN	1.3%	1.1%	7.7%	13.0%	17.4%	32.1%	47.1%	45.1%	26.5%	8.7%

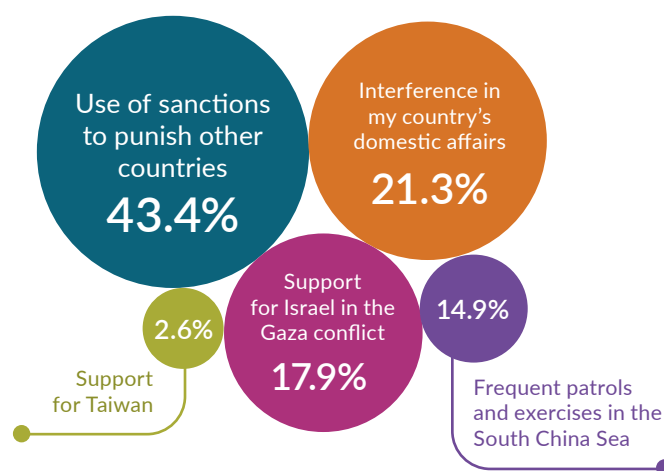
Q35A What could potentially worsen your positive impression of the United States? (Choose 1 response)

Perceptions of what could erode positive impressions of the US are now overwhelmingly shaped by economic concerns. Across ASEAN, US' use of sanctions, tariffs and other trade measures is the dominant response (43.4%), far outpacing concerns over military activities, domestic interference, support for Israel or support for Taiwan. This marks a notable shift toward geoeconomic anxieties as the primary source of unease regarding Washington's role in the region.

The strength of this concern is strikingly consistent across member states. It ranks first in most ASEAN member states including Vietnam (60.6%), Timor-Leste (60.0%), the Philippines (50.0%), Singapore (50.0%), Myanmar (45.5%), Thailand (43.9%) and Malaysia (40.3%). Even in Cambodia (34.2%) and Indonesia (33.3%), where other concerns are also salient, trade measures remain one of the top factors that could damage perceptions.

By comparison, traditional security-related issues such as US' patrols and exercises in the South China Sea (14.9%) rank much lower overall, though they remain relevant in Brunei (29.3%) and Laos (25.0%). Concerns about US interference in domestic affairs (21.3%) are more evenly distributed, particularly in Singapore (31.3%) and Laos (26.5%), suggesting sensitivity to sovereignty issues.

US' support for Israel in the Gaza conflict registers strongly in Indonesia (41.7%) and Malaysia (25.8%), reflecting the salience of Middle East developments in Muslim-majority countries. However, at the regional level, it remains secondary to economic measures. US' support for Taiwan ranks lowest overall (2.6%), indicating that cross-Strait dynamics are not the principal factor shaping perceptions of Washington.



658 respondents who chose the "Improve" and "Improve Significantly" options in Q35

Country	US' frequent patrols and exercises 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, tariffs, and other trade measures to punish other countries	
	2025	2026	2025	2026	2025	2026	2025	2026	2025	2026
ASEAN	17.1%	14.9%	29.2%	21.3%	27.2%	17.9%	5.2%	2.6%	21.3%	43.4%
BN	27.4%	29.3%	24.7%	13.8%	20.5%	19.0%	12.3%	3.4%	15.1%	34.5%
KH	23.5%	19.8%	31.6%	25.2%	24.5%	15.3%	6.1%	5.4%	14.3%	34.2%
ID	0.0%	5.6%	20.9%	19.4%	59.7%	41.7%	3.0%	0.0%	16.4%	33.3%
LA	15.2%	25.0%	29.3%	26.5%	26.3%	22.1%	8.1%	1.5%	21.2%	25.0%
MY	10.0%	11.3%	18.3%	22.6%	46.7%	25.8%	1.7%	0.0%	23.3%	40.3%
MM	27.2%	20.8%	19.6%	15.6%	22.8%	16.9%	8.7%	1.3%	21.7%	45.5%
PH	17.9%	20.3%	40.6%	20.3%	12.3%	4.7%	0.9%	4.7%	28.3%	50.0%
SG	13.8%	6.3%	44.8%	31.3%	22.4%	6.3%	3.4%	6.3%	15.5%	50.0%
TH	16.5%	12.2%	25.3%	24.4%	20.3%	14.6%	6.3%	4.9%	31.6%	43.9%
TL	7.3%	0.0%	19.5%	20.0%	22.0%	20.0%	4.9%	0.0%	46.3%	60.0%
VN	19.3%	13.1%	36.8%	15.2%	16.7%	10.1%	1.8%	1.0%	25.4%	60.6%

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

Expectations of how the US can improve relations with ASEAN member states point clearly toward a rules-based and economically constructive approach. At the regional level, the top response is that Washington should respect international law and its institutions and not undermine the global system (38.5%). This is followed by pursuing free trade and strategic partnerships instead of punitive tariffs (24.9%) and respecting national sovereignty and foreign policy autonomy (19.6%). Only 2.2% believe that the fault lines between their country and the US cannot be bridged.

The prominence of international law reflects a strong regional preference for predictability, multilateralism and institutional stability. This view is particularly pronounced in Singapore (53.3%), Timor-Leste (47.1%), Indonesia (47.0%), Malaysia (42.4%), and the Philippines (41.3%). These figures suggest that concerns over unilateral actions, sanctions or the weakening of global trade rules weigh heavily on regional assessments of US leadership.

At the same time, economic considerations are clearly central. Vietnam (53.8%), Thailand (35.8%), Singapore (30.8%), Malaysia (30.5%), and the Philippines (30.4%) prioritise a return to free trade and strategic economic engagement over the use of tariffs. This aligns closely with earlier findings that sanctions and trade measures are the primary factors that could worsen perceptions of the US.

In short, ASEAN stakeholders appear to be calling for greater geoeconomic reassurance.

Sovereignty concerns are particularly salient in Cambodia (42.4%) and Brunei (30.0%), where respondents emphasise non-interference and respect for foreign policy autonomy. Myanmar (25.0%) also registers relatively strong sensitivity to this issue.

People-to-people relations, while valued in some countries such as Myanmar (28.8%) and Laos (24.6%), rank lower overall compared to structural economic and legal concerns. This suggests that goodwill-building alone is insufficient without tangible policy shifts.



601 respondents who chose the “Worsen” and “Worsen Significantly” options in Q35

Country	Respect international law and its institutions and not undermine the global system		Deepen mutual understanding by enhancing people-to-people relations		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		Make bilateral trade truly mutually beneficial by addressing trade imbalances	Pursue free trade and strategic partnerships as opposed to the use of punitive tariffs
	2025	2026	2025	2026	2025	2026	2025	2026	2025	2026
ASEAN	39.8%	38.5%	13.7%	14.8%	24.4%	19.6%	3.0%	2.2%	19.1%	24.9%
BN	23.5%	35.0%	11.8%	17.5%	41.2%	30.0%	0.0%	2.5%	23.5%	15.0%
KH	15.8%	18.2%	26.3%	24.2%	47.4%	42.4%	5.3%	3.0%	5.3%	12.1%
ID	47.9%	47.0%	10.4%	3.6%	31.3%	22.9%	0.0%	0.0%	10.4%	26.5%
LA	42.9%	36.8%	14.3%	24.6%	28.6%	17.5%	14.3%	3.5%	0.0%	17.5%
MY	66.7%	42.4%	1.7%	8.5%	11.7%	16.9%	1.7%	1.7%	18.3%	30.5%
MM	30.4%	32.7%	30.4%	28.8%	17.4%	25.0%	8.7%	3.8%	13.0%	9.6%
PH	29.4%	41.3%	11.8%	13.0%	35.3%	15.2%	0.0%	0.0%	23.5%	30.4%
SG	60.0%	53.3%	8.9%	8.4%	8.9%	6.5%	0.0%	0.9%	22.2%	30.8%
TH	38.9%	39.5%	13.9%	4.9%	8.3%	17.3%	0.0%	2.5%	38.9%	35.8%
TL	100.0%	47.1%	0.0%	17.6%	0.0%	17.6%	0.0%	5.9%	0.0%	11.8%
VN	42.9%	30.8%	7.1%	11.5%	14.3%	3.8%	0.0%	0.0%	35.7%	53.8%

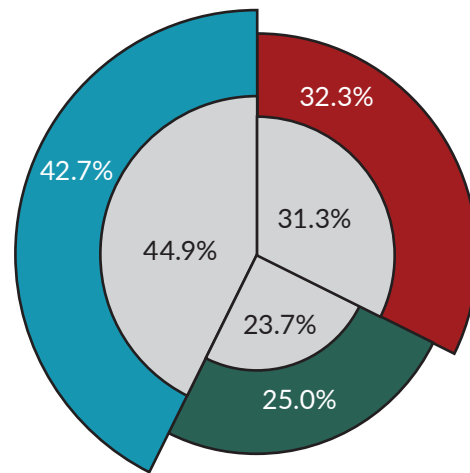
IS THE UNITED STATES A RELIABLE STRATEGIC PARTNER?

Confidence in the US as a strategic partner and provider of regional security remains relatively robust across ASEAN, though not without reservations. At the regional level, 42.7% express confidence or strong confidence in the US security role, compared to 32.3% who indicate little or no confidence, while 25.0% opt for no comment. This suggests that despite growing economic unease and concerns over trade measures reflected in earlier questions, Washington’s military presence and security contributions continue to be recognised and valued by a significant portion of the region.

Support is particularly strong in traditional security-aligned state like the Philippines which registers high confidence (55.4%), reflecting the resilience of its treaty alliance with the US. Timor-Leste (56.7%), Cambodia (56.0%), Brunei (52.3%) and Myanmar (49.7%) also show relatively high confidence levels. Laos (46.4%) and Vietnam (46.2%) similarly display moderate to strong confidence, suggesting that even countries with complex political ties to Washington continue to value its balancing role.

However, the data also reveal uneven perceptions. Indonesia records the highest level of scepticism (54.6% little/no confidence), followed by Singapore (53.3%) and Malaysia (40.2%). In Indonesia’s case, this may reflect a more autonomous strategic posture and sensitivity to great-power competition. Singapore’s more divided response – combined with a relatively high no-comment rate – may signal cautious pragmatism rather than outright rejection.

Thailand presents a mixed picture, with confidence levels (39.2%) closely balanced against little or no confidence (29.8%) and a sizeable no-comment response. This reflects Bangkok’s hedging posture between Washington and Beijing.



2026 2025
 ● No + Little Confidence ● No Comment ● Confident + Very Confident

Q36 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	
	2025	2026	2025	2026	2025	2026	2025	2026	2025	2026
ASEAN	7.7%	9.3%	23.6%	23.0%	23.7%	25.0%	36.1%	35.6%	8.8%	7.1%
BN	8.1%	7.7%	16.1%	21.3%	23.5%	18.7%	40.3%	48.4%	12.1%	3.9%
KH	2.9%	2.5%	20.9%	25.0%	23.8%	16.5%	43.0%	47.5%	9.3%	8.5%
ID	20.6%	29.2%	31.3%	25.4%	24.6%	27.5%	20.6%	16.1%	2.8%	1.7%
LA	6.0%	6.5%	14.6%	19.4%	18.5%	27.7%	41.7%	37.4%	19.2%	9.0%
MY	14.6%	16.0%	37.1%	24.2%	27.5%	30.4%	17.9%	27.3%	2.9%	2.1%
MM	7.2%	3.7%	21.6%	24.3%	21.6%	22.2%	38.1%	44.4%	11.3%	5.3%
PH	2.4%	3.3%	20.4%	24.2%	17.0%	17.1%	49.5%	43.6%	10.7%	11.8%
SG	7.4%	17.9%	31.4%	35.4%	30.6%	26.4%	28.1%	16.3%	2.5%	4.1%
TH	6.1%	7.0%	30.6%	22.8%	22.4%	31.0%	34.2%	28.7%	6.6%	10.5%
TL	3.0%	4.5%	13.6%	14.9%	42.4%	23.9%	30.3%	44.8%	10.6%	11.9%
VN	1.9%	4.3%	12.3%	16.3%	27.7%	33.2%	47.1%	37.0%	11.0%	9.2%

Perceptions of Trust 59-71

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

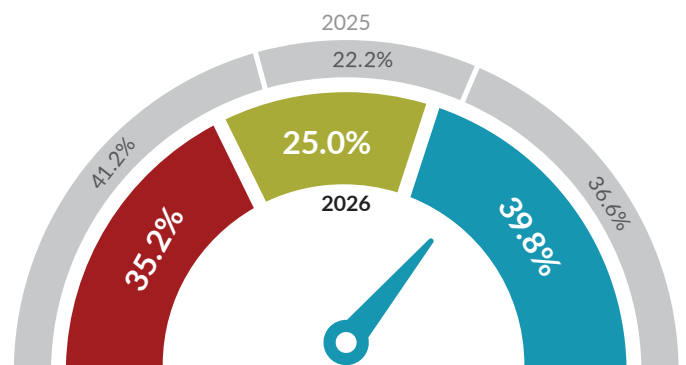
CHINA

For the first time since the survey was conducted in 2019, more than a third of ASEAN respondents trust China (39.8%). This figure includes those who are confident (34.5%) and very confident (5.3%) that China will do the right thing in contributing to global peace, security, prosperity, and governance. This surpasses the combined levels of distrust (35.2%) – those who express no confidence (8.8%) and little confidence (26.4%). Overall scepticism declined substantially, from 41.2% last year to 35.2% this year. Meanwhile, the level of trust increased from 36.6% to 39.8% over the same period.

High levels of confidence are observed in six ASEAN countries: Laos (60.7%), Brunei (55.5%), Cambodia (55.0%), Myanmar (41.8%), Thailand (39.8%), and Timor-Leste (34.3%). Meanwhile, distrust remains higher than trust in the Philippines (65.9%), Vietnam (41.8%), Indonesia (39.8%), Singapore (38.2%), and Malaysia (36.6%).

Among those who trust China, 47.8% believe that it possesses vast economic resources and strong political will to provide global leadership. This view is particularly pronounced in Timor-Leste (82.6%), Indonesia (62.4%), the Philippines (53.1%), and Brunei (48.8%). A significant proportion of respondents in this group also consider China a responsible stakeholder that respects and upholds international law (22.4%). This is followed by the perception that their countries’ political culture and worldviews are compatible with China’s (12.2%).

Among those who distrust China, 43.8% believe that its economic and military power could be used to threaten their countries’ interests and sovereignty. This perception is particularly strong among respondents from Brunei (63.3%), the Philippines (61.2%), Myanmar (57.1%), Indonesia (50.0%), Vietnam (46.8%), and Malaysia (46.5%). A significant proportion of respondents in this group also believe that China is preoccupied with its internal affairs and is therefore unable to focus adequately on global concerns and issues (23.6%). Additionally, 16.5% do not consider China a responsible power.



Q37 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	
	2025	2026	2025	2026	2025	2026	2025	2026	2025	2026
ASEAN	13.8%	8.8%	27.4%	26.4%	22.2%	25.0%	28.5%	34.5%	8.1%	5.3%
BN	4.7%	0.6%	14.8%	18.7%	30.2%	25.2%	34.9%	49.0%	15.4%	6.5%
KH	6.4%	2.5%	31.4%	26.5%	20.9%	16.0%	33.1%	48.5%	8.1%	6.5%
ID	13.9%	7.2%	33.3%	32.6%	18.7%	24.2%	30.6%	30.9%	3.6%	5.1%
LA	6.6%	4.5%	11.3%	14.2%	15.9%	20.6%	43.7%	55.5%	22.5%	5.2%
MY	8.8%	6.7%	31.7%	29.9%	27.9%	27.3%	25.4%	30.4%	6.3%	5.7%
MM	24.7%	15.3%	20.6%	18.0%	20.6%	24.9%	24.7%	38.1%	9.3%	3.7%
PH	35.4%	27.0%	34.0%	38.9%	14.6%	19.0%	13.6%	12.8%	2.4%	2.4%
SG	7.9%	6.5%	37.6%	31.7%	26.0%	25.2%	25.2%	29.3%	3.3%	7.3%
TH	7.1%	7.0%	30.6%	24.6%	19.9%	28.7%	35.2%	30.4%	7.1%	9.4%
TL	6.1%	1.5%	22.7%	31.3%	34.8%	32.8%	33.3%	31.3%	3.0%	3.0%
VN	22.6%	17.9%	28.4%	23.9%	27.1%	31.0%	18.7%	23.4%	3.2%	3.8%

Q37A Why do you trust China?

787 respondents who chose the “Confident” and “Very Confident” options in Q37

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	
	2025	2026	2025	2026	2025	2026	2025	2026	2025	2026
ASEAN	41.6%	47.8%	20.1%	22.4%	10.9%	10.7%	14.5%	12.2%	12.9%	7.0%
BN	29.3%	48.8%	24.0%	24.4%	20.0%	8.1%	14.7%	11.6%	12.0%	7.0%
KH	32.4%	48.2%	25.4%	23.6%	12.7%	14.5%	15.5%	10.0%	14.1%	3.6%
ID	69.8%	62.4%	14.0%	21.2%	0.0%	8.2%	8.1%	5.9%	8.1%	2.4%
LA	31.0%	36.2%	22.0%	29.8%	19.0%	19.1%	17.0%	10.6%	11.0%	4.3%
MY	60.5%	42.9%	23.7%	25.7%	2.6%	7.1%	2.6%	17.1%	10.5%	7.1%
MM	30.3%	40.5%	16.7%	35.4%	22.7%	11.4%	16.7%	10.1%	13.6%	2.5%
PH	42.4%	53.1%	12.1%	9.4%	9.1%	12.5%	9.1%	12.5%	27.3%	12.5%
SG	46.4%	40.0%	27.5%	31.1%	5.8%	10.0%	7.2%	4.4%	13.0%	14.4%
TH	44.6%	30.9%	18.1%	19.1%	8.4%	14.7%	21.7%	29.4%	7.2%	5.9%
TL	70.8%	82.6%	0.0%	4.3%	12.5%	0.0%	0.0%	0.0%	16.7%	13.0%
VN	29.4%	40.0%	17.6%	22.0%	8.8%	12.0%	32.4%	22.0%	11.8%	4.0%

Q37B Why do you distrust China?

731 respondents who chose the “Little Confidence” and “No Confidence” options in Q37

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		China does not have the capacity or political will for global leadership		I do not consider China a responsible or reliable power	
	2025	2026	2025	2026	2025	2026	2025	2026	2025	2026
ASEAN	47.6%	43.8%	12.6%	23.6%	8.5%	8.9%	8.8%	7.2%	22.5%	16.5%
BN	58.6%	63.3%	10.3%	20.0%	3.4%	13.3%	6.9%	0.0%	20.7%	3.3%
KH	43.1%	36.2%	18.5%	22.4%	10.8%	15.5%	12.3%	6.9%	15.4%	19.0%
ID	47.1%	50.0%	20.2%	17.0%	11.8%	11.7%	8.4%	12.8%	12.6%	8.5%
LA	29.6%	41.4%	11.1%	44.8%	14.8%	3.4%	18.5%	0.0%	25.9%	10.3%
MY	42.3%	46.5%	16.5%	22.5%	11.3%	7.0%	7.2%	7.0%	22.7%	16.9%
MM	51.1%	57.1%	5.7%	6.3%	11.4%	3.2%	8.0%	9.5%	23.9%	23.8%
PH	69.9%	61.2%	8.4%	15.1%	2.8%	7.2%	3.5%	2.9%	15.4%	13.7%
SG	36.4%	29.8%	10.0%	17.0%	5.5%	6.4%	11.8%	12.8%	36.4%	34.0%
TH	44.6%	31.5%	18.9%	38.9%	5.4%	3.7%	4.1%	7.4%	27.0%	18.5%
TL	36.8%	18.2%	15.8%	40.9%	26.3%	18.2%	10.5%	13.6%	10.5%	9.1%
VN	53.2%	46.8%	6.3%	14.3%	7.6%	7.8%	7.6%	6.5%	25.3%	24.7%

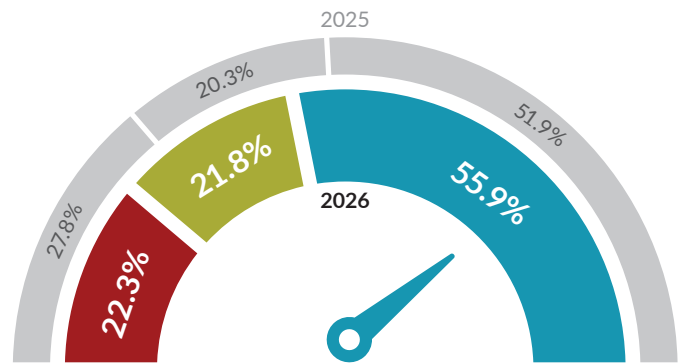
THE EUROPEAN UNION

There is a slight increase in trust in the EU among ASEAN respondents this year, rising from 51.9% in 2025 to 55.9% this year. Over the same period, distrust declined from 27.8% to 22.3%.

Trust in the EU exceeds distrust in all ASEAN countries except Indonesia. Levels of trust in Timor-Leste (73.1%), Laos (70.3%), Brunei (66.4%), Cambodia (64.0%), Myanmar (61.4%), and the Philippines (56.9%) are above the ASEAN average. Meanwhile, Indonesia is the only country where distrust (40.3%) outweighs trust (37.3%).

Those who are optimistic about the EU attribute their trust primarily to its leadership in championing international law (34.8%). This perception is especially strong among respondents from Brunei (57.3%), Singapore (46.9%), Cambodia (43.8%), Myanmar (41.4%), and Indonesia (40.9%). Other commonly cited reasons include the EU’s strong stance on environmental protection, human rights, and climate change (33.7%), as well as its vast economic resources and political will to provide global leadership (21.3%).

Meanwhile, respondents who express little or no confidence believe that the EU is preoccupied with its internal affairs and is therefore unable to focus adequately on global concerns and issues (35.1%). This perception is particularly strong among respondents from Brunei (51.6%), Laos (50.0%), Thailand (48.3%), the Philippines (40.5%), Cambodia (39.1%), Singapore (37.5%), and Myanmar (35.7%).



Q38 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	
	2025	2026	2025	2026	2025	2026	2025	2026	2025	2026
ASEAN	4.7%	3.2%	23.1%	19.1%	20.3%	21.8%	42.3%	45.6%	9.6%	10.3%
BN	4.0%	1.9%	12.8%	18.1%	23.5%	13.5%	38.3%	54.8%	21.5%	11.6%
KH	3.5%	1.5%	15.1%	21.5%	17.4%	13.0%	50.0%	51.5%	14.0%	12.5%
ID	11.9%	8.1%	35.3%	32.2%	13.1%	22.5%	36.5%	33.9%	3.2%	3.4%
LA	3.3%	1.3%	14.6%	11.6%	17.2%	16.8%	49.0%	50.3%	15.9%	20.0%
MY	7.1%	7.2%	37.9%	28.9%	26.7%	27.3%	25.0%	33.0%	3.3%	3.6%
MM	4.6%	2.1%	17.0%	20.1%	13.4%	16.4%	50.0%	52.9%	14.9%	8.5%
PH	2.4%	0.5%	25.2%	19.4%	16.5%	23.2%	51.0%	46.9%	4.9%	10.0%
SG	4.1%	4.9%	31.4%	24.4%	28.9%	30.9%	32.6%	35.4%	2.9%	4.5%
TH	3.6%	3.5%	23.0%	13.5%	24.0%	28.1%	41.3%	42.1%	8.2%	12.9%
TL	4.5%	0.0%	16.7%	6.0%	25.8%	20.9%	42.4%	56.7%	10.6%	16.4%
VN	2.6%	4.3%	18.7%	14.1%	22.6%	27.2%	49.0%	44.0%	7.1%	10.3%

Q38A Why do you trust the EU?

1076 respondents who chose the “Confident” and “Very Confident” options in Q38

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	
	2025	2026	2025	2026	2025	2026	2025	2026	2025	2026
ASEAN	6.8%	3.6%	10.5%	6.5%	19.6%	21.3%	29.5%	34.8%	33.6%	33.7%
BN	11.2%	1.9%	20.2%	5.8%	10.1%	9.7%	29.2%	57.3%	29.2%	25.2%
KH	9.1%	5.5%	10.0%	3.1%	11.8%	19.5%	40.0%	43.8%	29.1%	28.1%
ID	3.0%	2.3%	4.0%	6.8%	32.0%	15.9%	31.0%	40.9%	30.0%	34.1%
LA	8.2%	2.8%	23.5%	11.0%	13.3%	19.3%	20.4%	33.0%	34.7%	33.9%
MY	4.4%	1.4%	2.9%	9.9%	23.5%	26.8%	30.9%	21.1%	38.2%	40.8%
MM	9.5%	3.4%	16.7%	8.6%	12.7%	17.2%	31.7%	41.4%	29.4%	29.3%
PH	13.0%	10.0%	4.3%	4.2%	27.0%	24.2%	20.9%	20.8%	34.8%	40.8%
SG	3.5%	2.0%	8.1%	4.1%	8.1%	14.3%	43.0%	46.9%	37.2%	32.7%
TH	1.0%	5.3%	13.4%	4.3%	20.6%	27.7%	21.6%	25.5%	43.3%	37.2%
TL	8.6%	2.0%	5.7%	4.1%	22.9%	28.6%	14.3%	18.4%	48.6%	46.9%
VN	4.6%	3.0%	2.3%	10.0%	36.8%	31.0%	26.4%	34.0%	29.9%	22.0%

Q38B Why do you distrust the EU?

485 respondents who chose the “Little Confidence” and “No Confidence” options in Q38

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	
	2025	2026	2025	2026	2025	2026	2025	2026	2025	2026
ASEAN	35.6%	35.1%	12.5%	12.1%	24.6%	25.7%	9.9%	16.5%	17.4%	10.6%
BN	28.0%	51.6%	8.0%	6.5%	20.0%	9.7%	12.0%	19.4%	32.0%	12.9%
KH	18.8%	39.1%	25.0%	8.7%	37.5%	19.6%	15.6%	21.7%	3.1%	10.9%
ID	31.9%	22.1%	10.9%	20.0%	13.4%	15.8%	21.0%	16.8%	22.7%	25.3%
LA	29.6%	50.0%	18.5%	10.0%	22.2%	10.0%	11.1%	20.0%	18.5%	10.0%
MY	32.4%	25.7%	9.3%	15.7%	27.8%	27.1%	7.4%	12.9%	23.1%	18.6%
MM	33.3%	35.7%	14.3%	11.9%	28.6%	23.8%	0.0%	16.7%	23.8%	11.9%
PH	56.1%	40.5%	10.5%	26.2%	19.3%	9.5%	8.8%	19.0%	5.3%	4.8%
SG	46.5%	37.5%	5.8%	8.3%	30.2%	38.9%	2.3%	8.3%	15.1%	6.9%
TH	40.4%	48.3%	7.7%	13.8%	19.2%	20.7%	17.3%	10.3%	15.4%	6.9%
TL	35.7%	0.0%	14.3%	0.0%	28.6%	75.0%	14.3%	25.0%	7.1%	0.0%
VN	39.4%	35.3%	15.2%	11.8%	27.3%	32.4%	3.0%	11.8%	15.2%	8.8%

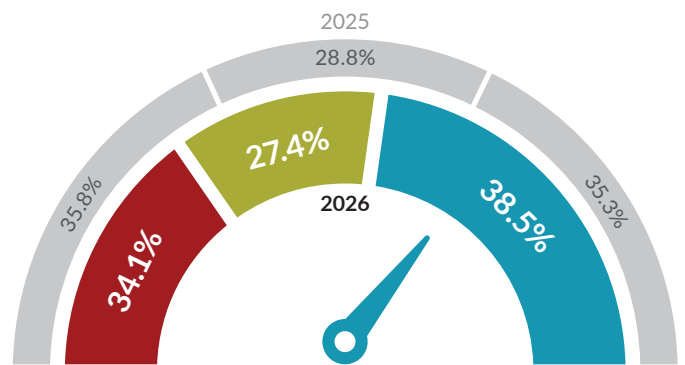
INDIA

The perception of trust towards India remains divided among ASEAN respondents, indicating ambivalence about India's leadership. For the first time since the survey was administered in 2019, regional respondents express slightly more trust (38.5%) in India's global contribution than distrust (34.1%). This slight shift suggests a modest improvement in regional perceptions of India's role in global affairs.

India saw levels of distrust outweigh trust in five ASEAN countries: Indonesia (59.3%), Singapore (48.4%), Malaysia (48.0%), Timor-Leste (46.3%), and the Philippines (36.5%). Meanwhile, higher levels of trust are observed in six ASEAN countries: Laos (61.3%), Brunei (60.0%), Cambodia (58.0%), Myanmar (55.0%), Vietnam (41.3%), and Thailand (35.6%).

Among the cohort who trust India, 30.1% believe that it is a responsible stakeholder that respects and champions international law. This view is shared strongly in Brunei (55.9%), Vietnam (43.4%), Myanmar (39.4%), Indonesia (33.3%), and Cambodia (31.9%). Almost a quarter (23.0%) of this cohort agree that India has vast economic resources and the political will to provide global leadership.

Meanwhile among those who distrust India, 33.6% believe that it does not have the capacity or political will for global leadership. This view is particularly strong in Timor-Leste (51.6%), Malaysia (40.9%), Cambodia (37.5%), Indonesia (37.1%), Singapore (37.0%), Thailand (35.7%), and the Philippines (33.8%).



Q39 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	
	2025	2026	2025	2026	2025	2026	2025	2026	2025	2026
ASEAN	12.5%	12.6%	23.3%	21.5%	28.8%	27.4%	27.7%	33.7%	7.6%	4.8%
BN	8.1%	7.1%	6.7%	19.4%	29.5%	13.5%	34.9%	52.3%	20.8%	7.7%
KH	7.6%	6.0%	16.3%	18.0%	25.6%	18.0%	41.9%	50.0%	8.7%	8.0%
ID	31.0%	30.1%	23.4%	29.2%	25.4%	24.2%	18.7%	16.1%	1.6%	0.4%
LA	9.9%	4.5%	12.6%	12.9%	19.9%	21.3%	38.4%	49.7%	19.2%	11.6%
MY	22.9%	22.2%	38.8%	25.8%	25.4%	27.8%	11.7%	23.7%	1.3%	0.5%
MM	8.8%	7.9%	20.1%	14.8%	30.9%	22.2%	30.4%	51.3%	9.8%	3.7%
PH	5.3%	9.0%	29.6%	27.5%	29.1%	29.9%	32.5%	31.8%	3.4%	1.9%
SG	16.1%	19.1%	40.5%	29.3%	30.2%	36.6%	12.8%	11.4%	0.4%	3.7%
TH	6.6%	5.3%	25.5%	19.3%	37.2%	39.8%	24.0%	29.2%	6.6%	6.4%
TL	10.6%	25.4%	25.8%	20.9%	31.8%	31.3%	30.3%	20.9%	1.5%	1.5%
VN	8.4%	2.2%	20.0%	19.6%	34.8%	37.0%	32.3%	33.7%	4.5%	7.6%

Q39A Why do you trust India?

754 respondents who chose the “Confident” and “Very Confident” options in Q39

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	
	2025	2026	2025	2026	2025	2026	2025	2026	2025	2026
ASEAN	17.3%	13.9%	19.0%	23.0%	30.1%	30.1%	16.2%	16.9%	17.5%	16.1%
BN	20.5%	9.7%	10.8%	6.5%	32.5%	55.9%	19.3%	11.8%	16.9%	16.1%
KH	18.4%	7.8%	9.2%	26.7%	26.4%	31.9%	25.3%	28.4%	20.7%	5.2%
ID	11.8%	20.5%	25.5%	20.5%	37.3%	33.3%	5.9%	0.0%	19.6%	25.6%
LA	17.2%	6.3%	14.9%	21.1%	23.0%	29.5%	31.0%	32.6%	13.8%	10.5%
MY	22.6%	8.5%	32.3%	25.5%	19.4%	23.4%	6.5%	10.6%	19.4%	31.9%
MM	24.4%	10.6%	16.7%	19.2%	25.6%	39.4%	23.1%	22.1%	10.3%	8.7%
PH	23.0%	16.9%	17.6%	29.6%	28.4%	19.7%	16.2%	14.1%	14.9%	19.7%
SG	9.4%	24.3%	21.9%	27.0%	37.5%	24.3%	9.4%	10.8%	21.9%	13.5%
TH	15.0%	11.5%	25.0%	21.3%	21.7%	16.4%	11.7%	19.7%	26.7%	31.1%
TL	28.6%	33.3%	47.6%	40.0%	9.5%	13.3%	4.8%	13.3%	9.5%	0.0%
VN	10.5%	3.9%	15.8%	15.8%	49.1%	43.4%	14.0%	22.4%	10.5%	14.5%

Q39B Why do you distrust India?

701 respondents who chose the “Little Confidence” and “No Confidence” options in Q39

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	
	2025	2026	2025	2026	2025	2026	2025	2026	2025	2026
ASEAN	30.3%	26.7%	40.2%	33.6%	2.7%	8.8%	5.8%	11.6%	21.0%	19.3%
BN	45.5%	36.6%	40.9%	19.5%	0.0%	14.6%	0.0%	7.3%	13.6%	22.0%
KH	24.4%	27.1%	53.7%	37.5%	2.4%	16.7%	4.9%	6.3%	14.6%	12.5%
ID	23.4%	20.7%	41.6%	37.1%	1.5%	4.3%	5.8%	14.3%	27.7%	23.6%
LA	29.4%	22.2%	44.1%	18.5%	0.0%	18.5%	0.0%	22.2%	26.5%	18.5%
MY	32.4%	24.7%	33.8%	40.9%	0.7%	3.2%	7.4%	5.4%	25.7%	25.8%
MM	28.6%	27.9%	37.5%	30.2%	7.1%	7.0%	3.6%	14.0%	23.2%	20.9%
PH	33.3%	31.2%	26.4%	33.8%	5.6%	10.4%	11.1%	7.8%	23.6%	16.9%
SG	34.3%	34.5%	40.1%	37.0%	3.6%	3.4%	3.6%	5.9%	18.2%	19.3%
TH	22.2%	19.0%	42.9%	35.7%	6.3%	14.3%	12.7%	16.7%	15.9%	14.3%
TL	20.8%	22.6%	29.2%	51.6%	4.2%	0.0%	12.5%	0.0%	33.3%	25.8%
VN	29.5%	27.5%	40.9%	27.5%	0.0%	5.0%	9.1%	27.5%	20.5%	12.5%

JAPAN

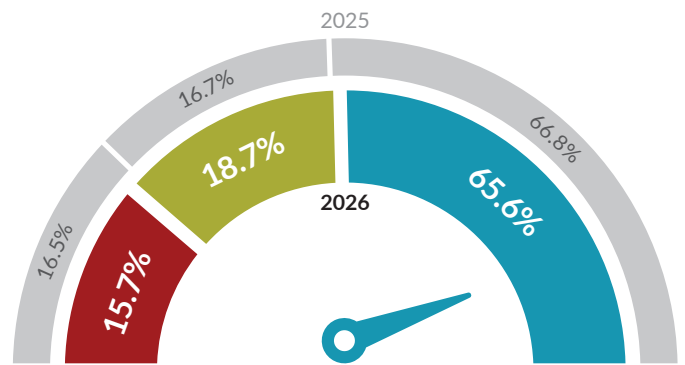
Japan continues to be the most trusted power in the region, with 65.6% of ASEAN respondents expressing confidence in it, although the level of trust declined slightly from 66.8% last year.

Across ASEAN countries, without exception, levels of trust in Japan outstrip levels of distrust. Japan is most trusted in the Philippines (77.3%), Cambodia (72.0%), Brunei (72.9%), and Vietnam (67.9%). The sharpest decline in trust is observed in Indonesia, where the level of trust fell from 61.5% in 2025 to 47.9% this year.

Interestingly, while the overall level of trust declined, the level of distrust also dropped slightly, from 16.5% last year to 15.7% this year. The highest levels of distrust towards Japan are found in Indonesia (31.4%), Malaysia (24.3%), Singapore (22.8%), and Myanmar (19.0%).

Among those who trust Japan, 41.4% of regional respondents believe that Japan is a responsible stakeholder that respects and champions international law. This perception is widely shared by respondents from Singapore (62.2%), Brunei (54.9%), Myanmar (50.0%), Vietnam (47.2%), and Malaysia (42.7%). Meanwhile, more than a fifth of respondents (22.7%) believe that Japan possesses vast economic resources and the political will to provide global leadership.

Among those who distrust Japan, 38.3% 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 Thailand (52.9%), the Philippines (47.8%), Singapore (46.4%), Cambodia (44.4%), Timor-Leste (40.0%), and Indonesia (39.2%). Additionally, 30.9% of this group believe that Japan lacks the capacity or political will for global leadership, with this perception most pronounced among respondents from Brunei (55.6%).



Q40 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	
	2025	2026	2025	2026	2025	2026	2025	2026	2025	2026
ASEAN	2.6%	2.4%	13.9%	13.3%	16.7%	18.7%	51.8%	51.0%	15.0%	14.6%
BN	1.3%	1.9%	4.7%	9.7%	22.1%	15.5%	53.7%	52.3%	18.1%	20.6%
KH	1.7%	1.0%	10.5%	12.5%	14.0%	14.5%	53.5%	57.0%	20.3%	15.0%
ID	4.8%	3.4%	21.8%	28.0%	11.9%	20.8%	54.8%	38.6%	6.7%	9.3%
LA	4.6%	1.3%	6.6%	8.4%	20.5%	13.5%	48.3%	53.5%	19.9%	23.2%
MY	3.3%	5.2%	19.6%	19.1%	19.6%	22.7%	48.3%	44.8%	9.2%	8.2%
MM	3.1%	3.7%	15.5%	15.3%	15.5%	16.4%	50.0%	53.4%	16.0%	11.1%
PH	0.0%	0.9%	11.7%	10.0%	5.3%	11.8%	61.2%	53.1%	21.8%	24.2%
SG	2.9%	4.1%	26.0%	18.7%	19.4%	25.6%	43.4%	43.5%	8.3%	8.1%
TH	0.5%	1.2%	12.8%	8.8%	20.4%	21.1%	51.0%	51.5%	15.3%	17.5%
TL	0.0%	3.0%	9.1%	4.5%	28.8%	23.9%	50.0%	62.7%	12.1%	6.0%
VN	3.2%	1.1%	9.7%	10.9%	18.7%	20.1%	53.5%	51.1%	14.8%	16.8%

Q40A Why do you trust Japan?

1293 respondents who chose the “Confident” and “Very Confident” options in Q40

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	
	2025	2026	2025	2026	2025	2026	2025	2026	2025	2026
ASEAN	18.8%	14.2%	19.2%	22.7%	40.5%	41.4%	10.5%	11.3%	11.0%	10.5%
BN	18.7%	9.7%	10.3%	8.0%	41.1%	54.9%	16.8%	15.0%	13.1%	12.4%
KH	10.2%	5.6%	20.5%	25.0%	36.2%	39.6%	20.5%	20.1%	12.6%	9.7%
ID	15.5%	13.3%	33.5%	28.3%	36.8%	35.4%	5.2%	9.7%	9.0%	13.3%
LA	21.4%	16.0%	7.8%	18.5%	29.1%	32.8%	19.4%	20.2%	22.3%	12.6%
MY	26.1%	18.4%	25.4%	23.3%	38.4%	42.7%	5.1%	7.8%	5.1%	7.8%
MM	25.8%	11.5%	11.7%	18.0%	41.4%	50.0%	13.3%	13.9%	7.8%	6.6%
PH	16.4%	19.6%	33.3%	38.0%	34.5%	27.0%	7.0%	7.4%	8.8%	8.0%
SG	13.6%	8.7%	12.8%	11.0%	60.0%	62.2%	4.8%	7.1%	8.8%	11.0%
TH	17.7%	16.1%	23.8%	28.8%	34.6%	30.5%	6.2%	8.5%	17.7%	16.1%
TL	31.7%	23.9%	34.1%	30.4%	24.4%	32.6%	2.4%	10.9%	7.3%	2.2%
VN	22.6%	13.6%	13.2%	20.0%	52.8%	47.2%	6.6%	3.2%	4.7%	16.0%

Q40B Why do you distrust Japan?

340 respondents who chose the “Little Confidence” and “No Confidence” options in Q40

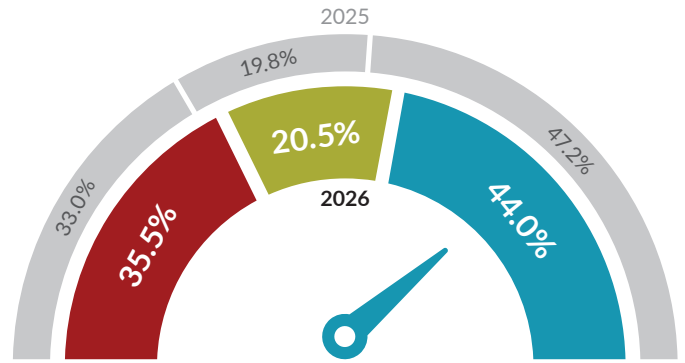
Country	I am concerned that Japan is distracted with its internal affairs and relations with its Northeast Asian neighbours (i.e. China, Korea and Taiwan), and thus cannot focus on global concerns and issues		Japan does not have the capacity or political will for global leadership		Japan's economic and 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	
	2025	2026	2025	2026	2025	2026	2025	2026	2025	2026
ASEAN	34.6%	38.3%	28.4%	30.9%	7.1%	9.2%	12.9%	13.2%	17.1%	8.5%
BN	11.1%	27.8%	22.2%	55.6%	0.0%	5.6%	44.4%	11.1%	22.2%	0.0%
KH	33.3%	44.4%	23.8%	18.5%	9.5%	22.2%	9.5%	3.7%	23.8%	11.1%
ID	43.3%	39.2%	26.9%	25.7%	7.5%	9.5%	9.0%	16.2%	13.4%	9.5%
LA	11.8%	13.3%	23.5%	40.0%	5.9%	6.7%	11.8%	20.0%	47.1%	20.0%
MY	38.2%	34.0%	32.7%	29.8%	5.5%	6.4%	10.9%	19.1%	12.7%	10.6%
MM	50.0%	38.9%	19.4%	25.0%	5.6%	13.9%	11.1%	11.1%	13.9%	11.1%
PH	50.0%	47.8%	16.7%	13.0%	20.8%	13.0%	4.2%	21.7%	8.3%	4.3%
SG	45.7%	46.4%	32.9%	26.8%	4.3%	5.4%	5.7%	5.4%	11.4%	16.1%
TH	42.3%	52.9%	30.8%	29.4%	11.5%	0.0%	7.7%	11.8%	7.7%	5.9%
TL	16.7%	40.0%	33.3%	40.0%	16.7%	0.0%	16.7%	20.0%	16.7%	0.0%
VN	20.0%	36.4%	55.0%	36.4%	0.0%	18.2%	15.0%	4.5%	10.0%	4.5%

THE UNITED STATES

The average level of trust among ASEAN respondents towards the US remains relatively stable, although it declined slightly from 47.2% last year to 44.0% this year. Similarly, there is a small increase in the levels of distrust, rising from 33.0% to 35.5% over the same period.

could be used to threaten their countries’ interests and sovereignty. This differs from last year’s survey, in which the main reason cited was that the US is distracted by its internal affairs and therefore unable to focus on global concerns and issues.

Confidence in the US outstrips distrust in most ASEAN countries, except in Singapore, Indonesia, and Malaysia, where levels of distrust exceed levels of trust. The largest drop in trust is observed in Vietnam, where confidence fell from 60.6% in 2025 to 48.9% this year. Meanwhile, the sharpest increase in distrust is found in Singapore, where the level of distrust rose from 47.2% to 62.6% over the same period.



Among those who trust the US, 32.5% believe that the US has vast economic resources and the political will to provide global leadership, although this rate dropped noticeably from 38.5% last year. This perception is widely shared among respondents from Timor-Leste (47.6%), Vietnam (41.1%), and Myanmar (38.2%).

Among those who distrust the US, more than a third (35.0%) think that the US’ economic and military power

Q41 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	
	2025	2026	2025	2026	2025	2026	2025	2026	2025	2026
ASEAN	10.1%	12.1%	22.9%	23.4%	19.8%	20.5%	35.4%	36.2%	11.8%	7.8%
BN	10.1%	13.5%	14.1%	18.7%	22.1%	13.5%	36.9%	49.0%	16.8%	5.2%
KH	4.7%	2.0%	20.9%	25.0%	15.7%	17.5%	44.8%	48.5%	14.0%	7.0%
ID	26.2%	36.4%	32.1%	25.4%	16.7%	20.8%	20.6%	16.5%	4.4%	0.8%
LA	7.3%	7.1%	15.9%	16.1%	15.9%	23.2%	40.4%	42.6%	20.5%	11.0%
MY	21.3%	23.7%	35.0%	26.3%	20.4%	23.2%	20.4%	23.7%	2.9%	3.1%
MM	6.7%	4.2%	19.6%	20.1%	19.1%	21.7%	43.3%	47.6%	11.3%	6.3%
PH	2.4%	2.4%	18.0%	23.2%	13.1%	18.0%	51.5%	40.3%	15.0%	16.1%
SG	11.2%	23.2%	36.0%	39.4%	28.9%	22.4%	21.5%	11.8%	2.5%	3.3%
TH	8.2%	7.6%	25.0%	25.7%	22.4%	27.5%	34.2%	28.1%	10.2%	11.1%
TL	6.1%	7.5%	9.1%	14.9%	33.3%	14.9%	47.0%	50.7%	4.5%	11.9%
VN	3.2%	6.0%	12.9%	22.3%	23.2%	22.8%	40.0%	39.7%	20.6%	9.2%

Q41A Why do you trust the US?

828 respondents who chose the “Confident” and “Very Confident” options in Q41

Country	I respect the US and admire its civilisation and culture		My country's political culture and worldview are compatible with the US's		The US has vast economic resources and the political will to provide global leadership		The US is a responsible stakeholder that respects and champions international law		The US's military power is an asset for global peace and security	
	2025	2026	2025	2026	2025	2026	2025	2026	2025	2026
ASEAN	6.3%	7.2%	9.1%	8.0%	38.5%	32.5%	17.8%	20.9%	28.2%	31.4%
BN	11.3%	3.6%	6.3%	8.3%	20.0%	14.3%	22.5%	34.5%	40.0%	39.3%
KH	7.9%	3.6%	11.9%	7.2%	33.7%	27.9%	20.8%	23.4%	25.7%	37.8%
ID	1.6%	4.9%	3.2%	7.3%	58.7%	36.6%	27.0%	31.7%	9.5%	19.5%
LA	7.6%	8.4%	8.7%	4.8%	26.1%	28.9%	21.7%	31.3%	35.9%	26.5%
MY	3.6%	7.7%	12.5%	7.7%	42.9%	32.7%	12.5%	17.3%	28.6%	34.6%
MM	14.2%	12.7%	7.5%	3.9%	29.2%	38.2%	19.8%	25.5%	29.2%	19.6%
PH	5.1%	11.8%	12.4%	14.3%	34.3%	24.4%	16.8%	11.8%	31.4%	37.8%
SG	3.4%	10.8%	13.8%	13.5%	37.9%	29.7%	13.8%	8.1%	31.0%	37.8%
TH	1.1%	7.5%	13.8%	7.5%	46.0%	35.8%	12.6%	22.4%	26.4%	26.9%
TL	5.9%	2.4%	2.9%	7.1%	61.8%	47.6%	14.7%	7.1%	14.7%	35.7%
VN	7.4%	5.6%	1.1%	6.7%	56.4%	41.1%	10.6%	16.7%	24.5%	30.0%

Q41B Why do you distrust the US?

761 respondents who chose the “Little Confidence” and “No Confidence” options in Q41

Country	I am concerned that the US is distracted with its internal affairs and thus cannot focus on global concerns and issues		My country's political culture and worldview are incompatible with the US's		The US does not have the capacity or political will for global leadership		The US's economic and military power could be used to threaten my country's interests and sovereignty		I do not consider the US a responsible or reliable power	
	2025	2026	2025	2026	2025	2026	2025	2026	2025	2026
ASEAN	34.0%	32.2%	8.8%	8.1%	4.9%	5.6%	26.6%	35.0%	25.7%	19.1%
BN	19.4%	28.0%	2.8%	12.0%	2.8%	2.0%	30.6%	38.0%	44.4%	20.0%
KH	27.3%	42.6%	15.9%	5.6%	6.8%	1.9%	34.1%	44.4%	15.9%	5.6%
ID	23.1%	11.6%	12.9%	14.4%	2.7%	2.1%	35.4%	51.4%	25.9%	20.5%
LA	31.4%	36.1%	5.7%	13.9%	2.9%	5.6%	37.1%	38.9%	22.9%	5.6%
MY	18.5%	18.6%	7.4%	6.2%	7.4%	5.2%	34.1%	41.2%	32.6%	28.9%
MM	45.1%	34.8%	17.6%	10.9%	9.8%	17.4%	9.8%	19.6%	17.6%	17.4%
PH	57.1%	38.9%	0.0%	7.4%	2.4%	7.4%	28.6%	29.6%	11.9%	16.7%
SG	48.2%	26.0%	5.3%	3.2%	11.4%	9.1%	11.4%	24.0%	23.7%	37.7%
TH	41.5%	36.8%	4.6%	3.5%	3.1%	3.5%	24.6%	36.8%	26.2%	19.3%
TL	60.0%	60.0%	0.0%	0.0%	20.0%	0.0%	10.0%	26.7%	10.0%	13.3%
VN	28.0%	21.2%	16.0%	11.5%	0.0%	7.7%	20.0%	34.6%	36.0%	25.0%

TRUST AND DISTRUST RANKINGS OF MAJOR POWERS IN THE REGION

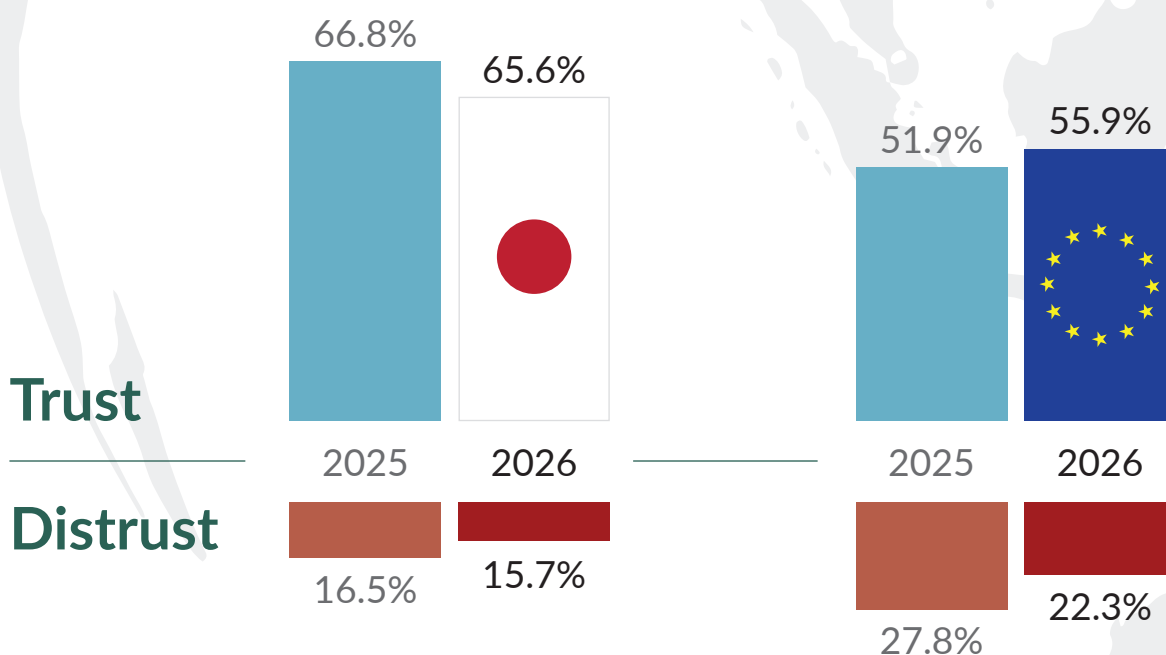
The “trust” and “distrust” rankings of five countries that can exert influence on Southeast Asia are based on a consolidated five-point Likert scale of positive and negative responses (“Very Confident” to “No Confidence”). The “No Comment” responses are removed from this analysis.

Japan (65.6%) continues to be the most trusted major power among ASEAN respondents, followed by the EU (55.9%), the US (44.0%), China (39.8%), and India (38.5%). Although Japan’s trust level declined slightly from 66.8% last year, it maintains a substantial lead over other major powers, reflecting the region’s consistent confidence in Tokyo’s approach to regional engagement. Japan’s long-standing reputation as a responsible stakeholder that respects and upholds international law remains the primary reason for its favourable perception. A large proportion of respondents (41.4%) continue to hold this view, particularly in Singapore, Brunei, Myanmar, Vietnam, and Malaysia. At the same time, scepticism towards Japan remains relatively limited compared to other major powers, although some respondents perceive Japan as constrained by domestic political priorities and its complex relations with Northeast Asian neighbours, which may limit its ability to fully exercise global leadership.

The EU has consolidated its position as the second most trusted major power in the region, with average trust at the regional level rising from 51.9% in 2025 to 55.9% this year, while distrust has declined notably from 27.8% to 22.3%. The EU’s favourable perception continues to be driven largely by its strong reputation for championing international law and multilateral norms. More than a

third of respondents view the EU as a leader in upholding international law, while many also associate the bloc with its strong stance on environmental protection, human rights, and climate change. Nevertheless, concerns remain regarding the EU’s ability to translate its normative influence into effective global leadership. A sizeable portion of respondents continue to believe that the EU is overly preoccupied with internal affairs and therefore unable to focus adequately on global challenges.

Trust in the US has declined slightly this year, falling from 47.2% in 2025 to 44.0% this year, while distrust has increased from 33.0% to 35.5%. Although the US remains the third most trusted major power in the region, the narrowing gap between trust and distrust suggests growing ambivalence among ASEAN respondents regarding Washington’s leadership. Those who view the US favourably continue to highlight its vast economic resources and political will to exercise global leadership. However, scepticism towards the US increasingly stems from concerns that its economic and military power could be used to threaten other countries’ interests and sovereignty. Such perceptions may also be influenced by Washington’s interventionist behaviour in other regions, including its increasing political pressure in Latin America and the Middle East, which some observers interpret as evidence of the US’ willingness to use its power to shape



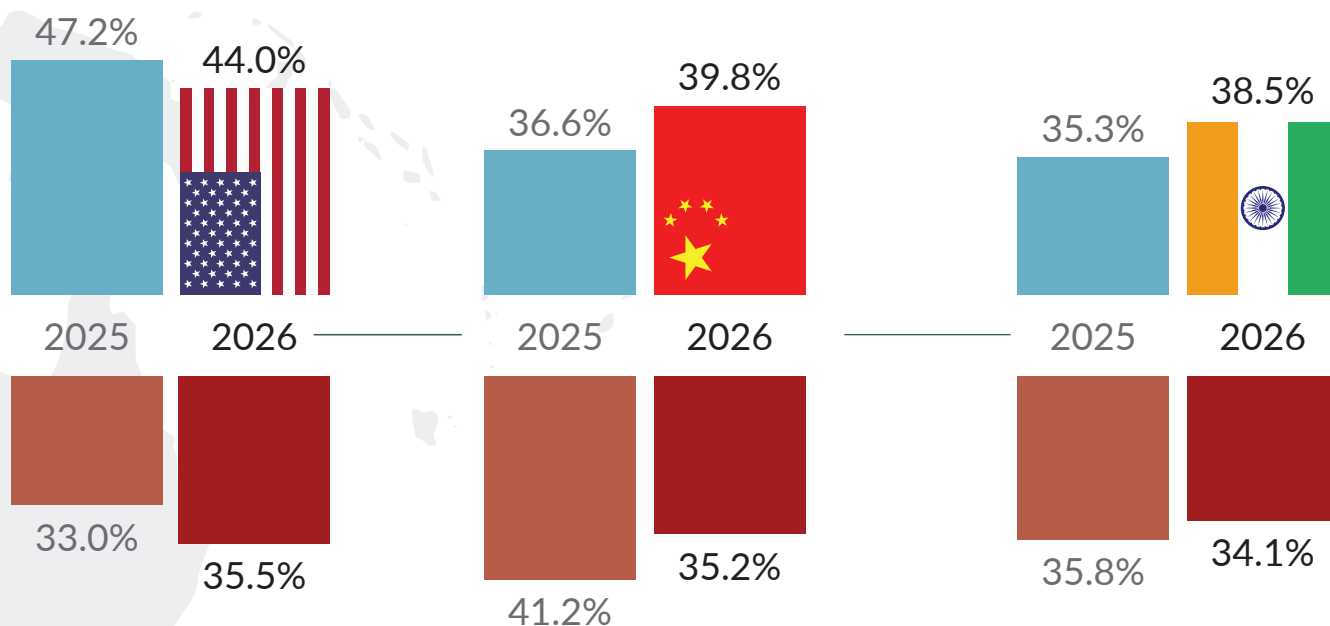
political and economic outcomes abroad. This marks a shift from last year's survey, when scepticism was primarily attributed to perceptions that the US was distracted by its internal affairs and therefore unable to focus on global concerns.

China has seen a modest improvement in regional perceptions this year, with trust rising from 36.6% to 39.8%, while distrust has declined significantly from 41.2% to 35.2%. Notably, this marks the first time since the survey began in 2019 that confidence in China exceeds scepticism among ASEAN respondents. Those who view China favourably continue to emphasise its vast economic resources and strong political will to provide global leadership. However, concerns about China's economic and military assertiveness remain prevalent. A significant proportion of respondents who distrust China believe that its growing power could threaten their countries' interests and sovereignty. These concerns are reinforced by Beijing's increasingly assertive behaviour in regional disputes, particularly in the South China Sea, where expansive maritime claims and coercive actions against claimant states have heightened tensions. Such developments have fuelled perceptions among some ASEAN respondents that China's rise may not necessarily translate into benign leadership, but could instead challenge regional stability and undermine the sovereignty of some ASEAN states.

For the first time since the survey was administered in 2019, the share of regional respondents expressing trust in India's global contribution (38.5%) slightly exceeds those expressing distrust (34.1%). This indicates a more positive ASEAN perception of India's role in global affairs.

Those who trust India tend to view it as a responsible stakeholder that respects and champions international law, while others acknowledge its potential to contribute to global leadership given its growing economic capacity. However, scepticism persists regarding India's ability to translate its potential into sustained global leadership. A sizeable portion of respondents believe that India lacks the capacity or political will to exercise leadership beyond its immediate region.

The changing trust dynamics among major powers reflect ASEAN respondents' assessments of global leadership and recent geopolitical developments. Japan continues to enjoy the highest and most consistent levels of trust, reinforcing its reputation as a stable and dependable partner for the region. The EU's rising trust highlights the continued appeal of its commitment to international law and multilateral norms. Perceptions of the US have softened slightly, reflecting growing concerns about its increasingly hawkish stance and retreat from the rules-based multilateral system. Meanwhile, rising trust in both India and China suggests a growing regional willingness to engage a more multipolar distribution of influence. China's improving trust levels indicate a gradual recalibration in regional strategic calculations, though concerns about its assertive behaviour remain. India's modest gains suggest increasing recognition of its potential role in global affairs, but doubts about its leadership capacity persist. Together, these perceptions reflect ASEAN's continued preference for a diversified strategic environment in which multiple major powers contribute to regional stability and economic opportunities, rather than reliance on any single dominant actor.



SECTION VI

Soft Power

72-76

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

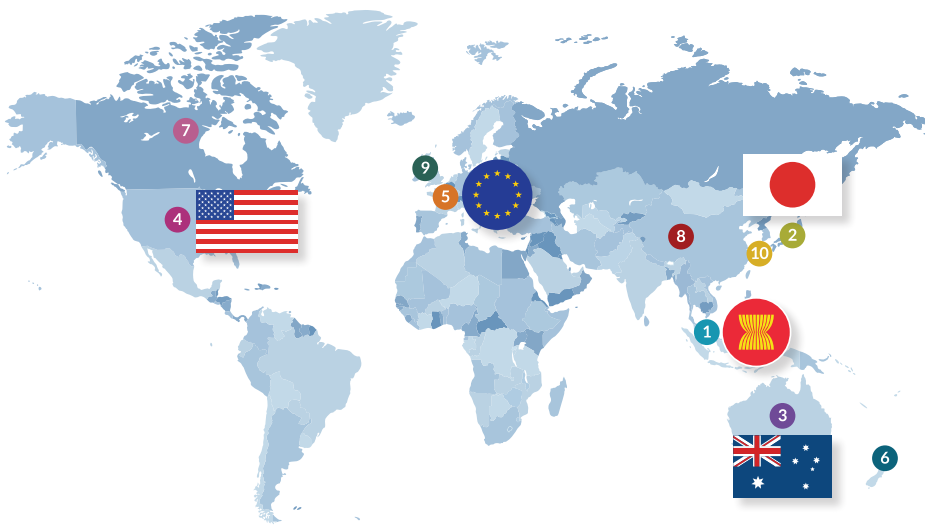
MOST PREFERRED COUNTRY TO LIVE OR WORK IN

Regional respondents continue to favour an ASEAN member state as a potential relocation destination, at 19.0%. This option ranks first in four ASEAN countries, namely Malaysia (32.0%), Brunei (28.4%), Singapore (23.2%), and Vietnam (17.9%).

Japan (16.8%) retains its position as the second most preferred destination to live or work in and is the top choice for four ASEAN countries, including Indonesia (25.0%), the Philippines (23.7%), Thailand (22.8%), and Myanmar (17.5%).

Australia (15.1%) has overtaken the US as the third most preferred relocation option, reflecting the preference for more geographically proximate options. This is the top choice for Timor-Leste (32.8%) and Cambodia (20.5%). The US (11.4%) ranks fourth this year but is still the top choice for Laos (21.9%) and Myanmar (17.5%).

As for the remaining options, each received less than 10% of the regional vote share, with newly added Canada (6.5%) ranking seventh, ahead of China (5.4%), the UK (5.0%), and the Republic of Korea (3.6%).



- 1 An ASEAN member state 19.0%
- 2 Japan 16.8%
- 3 Australia 15.1%
- 4 The United States 11.4%
- 5 An EU member state 9.7%
- 6 New Zealand 7.5%
- 7 Canada 6.5%
- 8 China 5.4%
- 9 The United Kingdom 5.0%
- 10 Republic of Korea 3.6%

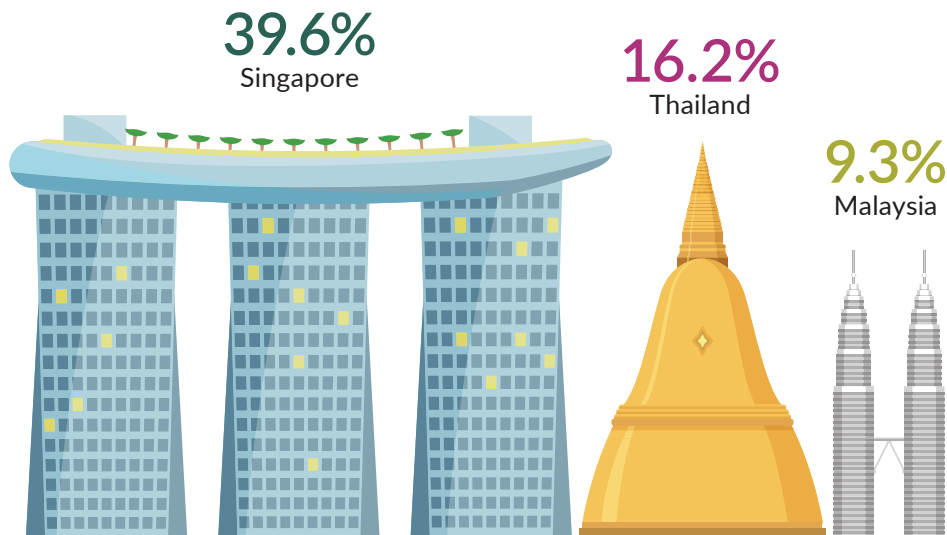
Q42 If I had a choice, I would like to live or work in this country:

Country	An ASEAN member state	An EU member state	Australia	Canada	China	Japan	New Zealand	Republic of Korea	The United Kingdom	The United States
ASEAN	19.0%	9.7%	15.1%	6.5%	5.4%	16.8%	7.5%	3.6%	5.0%	11.4%
BN	28.4%	7.7%	11.6%	1.9%	7.7%	14.2%	7.1%	1.3%	8.4%	11.6%
KH	17.0%	6.0%	20.5%	5.0%	8.0%	14.0%	5.0%	2.5%	2.0%	20.0%
ID	15.3%	17.4%	15.7%	8.5%	4.2%	25.0%	3.8%	3.4%	4.2%	2.5%
LA	11.6%	11.6%	11.0%	10.3%	5.8%	14.8%	5.8%	3.9%	3.2%	21.9%
MY	32.0%	4.1%	13.9%	5.2%	7.2%	16.5%	9.8%	4.1%	4.6%	2.6%
MM	16.9%	8.5%	10.6%	6.3%	6.3%	17.5%	9.0%	5.8%	1.6%	17.5%
PH	6.2%	7.6%	9.0%	10.4%	0.0%	23.7%	16.1%	3.3%	6.6%	17.1%
SG	23.2%	8.1%	17.1%	5.7%	10.2%	15.0%	9.8%	2.8%	4.5%	3.7%
TH	14.0%	11.1%	10.5%	7.6%	4.7%	22.8%	5.8%	5.8%	5.8%	11.7%
TL	26.9%	10.4%	32.8%	4.5%	0.0%	6.0%	7.5%	1.5%	9.0%	1.5%
VN	17.9%	13.6%	13.6%	6.0%	4.9%	15.8%	2.7%	4.9%	5.4%	15.2%

Q42A Please select the ASEAN country you would like to live or work in.

Among respondents who selected an ASEAN member state as their preferred relocation destination, Singapore (39.6%) remains the top choice, followed by Thailand (16.2%) and Malaysia (9.3%), with Malaysia narrowly overtaking Vietnam (7.7%) for third place this year.

Unlike previous years, when many respondents preferred to remain in their home countries, this year shows a more even split. Respondents from Malaysia, Singapore, Thailand, Timor-Leste, and Vietnam prefer to stay in their own countries, while those from Brunei, Cambodia, Indonesia, Laos, Myanmar, and the Philippines favour Singapore as their top relocation choice.



371 respondents who chose the “An ASEAN member state” option in Q42

Country	BN	KH	ID	LA	MY	MM	PH	SG	TH	TL	VN
ASEAN	5.8%	2.7%	6.1%	2.3%	9.3%	2.7%	3.4%	39.6%	16.2%	4.4%	7.7%
BN	36.4%	0.0%	0.0%	0.0%	15.9%	0.0%	0.0%	38.6%	4.5%	0.0%	4.5%
KH	2.9%	29.4%	2.9%	2.9%	5.9%	0.0%	0.0%	47.1%	8.8%	0.0%	0.0%
ID	8.3%	0.0%	33.3%	0.0%	11.1%	0.0%	0.0%	44.4%	2.8%	0.0%	0.0%
LA	0.0%	0.0%	0.0%	22.2%	0.0%	0.0%	0.0%	44.4%	27.8%	0.0%	5.6%
MY	6.5%	0.0%	1.6%	0.0%	48.4%	0.0%	0.0%	32.3%	6.5%	1.6%	3.2%
MM	0.0%	0.0%	6.3%	0.0%	6.3%	25.0%	3.1%	34.4%	25.0%	0.0%	0.0%
PH	7.7%	0.0%	0.0%	0.0%	0.0%	0.0%	30.8%	53.8%	0.0%	7.7%	0.0%
SG	1.8%	0.0%	8.8%	0.0%	3.5%	1.8%	0.0%	77.2%	5.3%	0.0%	1.8%
TH	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	8.3%	91.7%	0.0%	0.0%
TL	0.0%	0.0%	11.1%	0.0%	11.1%	0.0%	0.0%	33.3%	5.6%	38.9%	0.0%
VN	0.0%	0.0%	3.0%	0.0%	0.0%	3.0%	3.0%	21.2%	0.0%	0.0%	69.7%

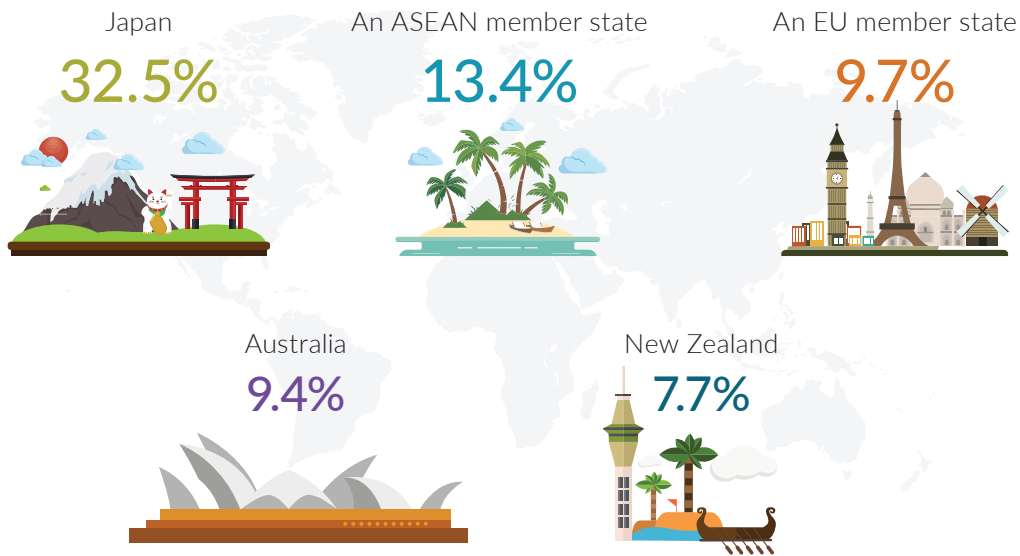
MOST PREFERRED COUNTRY TO VISIT

ASEAN’s top three holiday locations remain unchanged from 2025. Japan (32.5%) continues to be the most popular travel destination, followed by an ASEAN member state (13.4%) and an EU country (9.7%).

Japan is the preferred destination for all ASEAN member states, except for Timor-Leste, where respondents chose an ASEAN country as their top choice.

In addition to being Timor-Leste’s top choice, preference to visit an ASEAN member state is also highly preferred in Brunei (18.7%) and Malaysia (17.5%). Meanwhile, the option of travelling to an EU country is notably popular in Indonesia (18.6%), Timor-Leste (16.4%), and Laos (11.0%).

Each of the remaining seven destinations garner less than 10% of the regional vote share.



Q43 Which country is your favourite holiday destination?

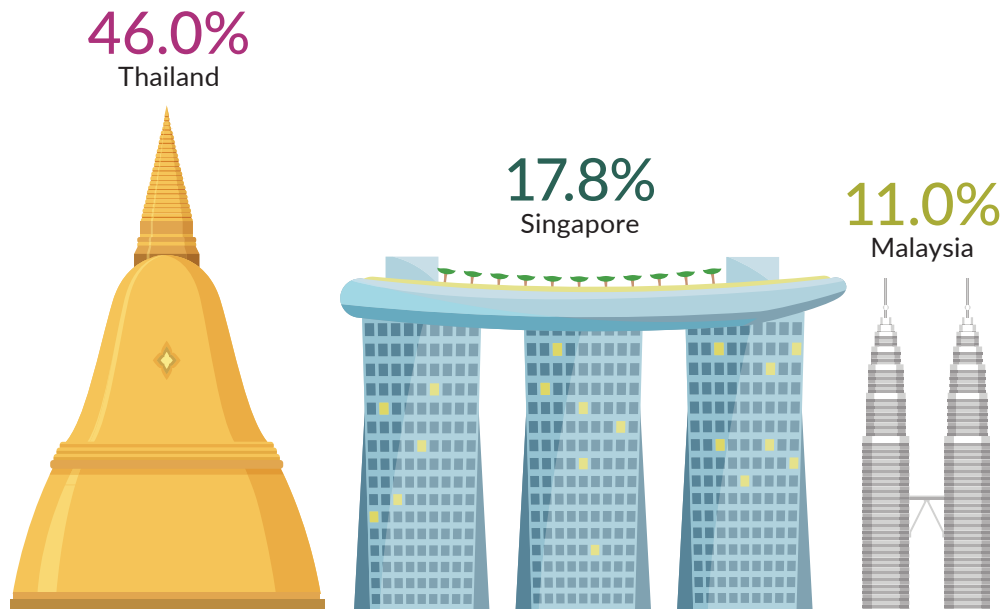
Country	An ASEAN member state	An EU member state	Australia	Canada	China	Japan	New Zealand	Republic of Korea	The United Kingdom	The United States
ASEAN	13.4%	9.7%	9.4%	3.1%	6.5%	32.5%	7.7%	6.1%	4.6%	7.1%
BN	18.7%	7.7%	12.3%	0.6%	7.1%	22.6%	7.1%	3.2%	11.0%	9.7%
KH	10.5%	5.0%	14.5%	3.5%	6.5%	32.0%	4.5%	4.0%	3.5%	16.0%
ID	15.7%	18.6%	5.1%	1.7%	6.4%	36.9%	3.4%	9.7%	1.7%	0.8%
LA	10.3%	11.0%	11.6%	7.1%	5.2%	28.4%	5.2%	1.3%	2.6%	17.4%
MY	17.5%	9.3%	9.3%	1.0%	7.7%	32.5%	9.3%	6.2%	5.2%	2.1%
MM	12.2%	10.6%	12.2%	3.7%	6.9%	18.0%	14.8%	4.8%	3.7%	13.2%
PH	9.0%	5.7%	2.8%	2.8%	0.5%	51.7%	7.1%	10.9%	4.3%	5.2%
SG	13.4%	7.7%	8.5%	2.0%	9.3%	39.8%	8.9%	5.3%	4.1%	0.8%
TH	4.1%	5.8%	7.0%	2.9%	9.4%	50.9%	8.8%	5.3%	3.5%	2.3%
TL	28.4%	16.4%	6.0%	4.5%	3.0%	13.4%	11.9%	7.5%	9.0%	0.0%
VN	7.6%	8.7%	13.6%	4.3%	9.2%	31.5%	3.3%	9.2%	2.2%	10.3%

Q43A Please select your favourite ASEAN country for a holiday destination.

Among respondents who favour an ASEAN member state as their favourite holiday destination, Thailand (46.0%) continues to be the top choice, rising 12.3 percentage points from last year. Thailand is the preferred option for eight countries, namely Brunei, Cambodia, Laos, Malaysia, Myanmar, Singapore, Thailand, and Timor-Leste.

Singapore (17.8%) and Malaysia (11.0%) have switched rankings this year, taking the second and third spots, respectively. Singapore is the top choice for the Philippines and Indonesia respondents.

Vietnam (8.8%) follows closely behind in fourth place and is the top choice for Vietnam respondents themselves.



252 respondents who chose the "An ASEAN member state" option in Q43

Country	BN	KH	ID	LA	MY	MM	PH	SG	TH	TL	VN
ASEAN	0.3%	1.4%	7.5%	0.3%	11.0%	1.9%	3.9%	17.8%	46.0%	1.2%	8.8%
BN	0.0%	0.0%	6.9%	0.0%	24.1%	0.0%	3.4%	31.0%	34.5%	0.0%	0.0%
KH	0.0%	4.8%	0.0%	0.0%	0.0%	0.0%	0.0%	19.0%	71.4%	0.0%	4.8%
ID	0.0%	0.0%	24.3%	0.0%	27.0%	0.0%	0.0%	29.7%	16.2%	0.0%	2.7%
LA	0.0%	0.0%	6.3%	0.0%	0.0%	0.0%	6.3%	18.8%	68.8%	0.0%	0.0%
MY	2.9%	0.0%	14.7%	0.0%	20.6%	0.0%	2.9%	5.9%	44.1%	2.9%	5.9%
MM	0.0%	0.0%	4.3%	0.0%	0.0%	0.0%	8.7%	4.3%	69.6%	0.0%	13.0%
PH	0.0%	5.3%	0.0%	0.0%	5.3%	0.0%	21.1%	31.6%	26.3%	0.0%	10.5%
SG	0.0%	0.0%	15.2%	3.0%	33.3%	0.0%	0.0%	0.0%	36.4%	0.0%	12.1%
TH	0.0%	0.0%	0.0%	0.0%	0.0%	14.3%	0.0%	0.0%	85.7%	0.0%	0.0%
TL	0.0%	5.3%	10.5%	0.0%	10.5%	0.0%	0.0%	26.3%	31.6%	10.5%	5.3%
VN	0.0%	0.0%	0.0%	0.0%	0.0%	7.1%	0.0%	28.6%	21.4%	0.0%	42.9%

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 2,008 respondents for taking their time to complete this survey. By expressing your collective views, ASEAN stakeholders are held to high standards to create an ASEAN Community that is inclusive and embracing.

Last but not least, we are grateful to all our readers for their support and feedback as we continuously work to improve the survey.

If you wish to stay updated on the Centre's activities, do sign up for our newsletter at <https://for.edu.sg/asc-updates> or by scanning the QR code below.

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



