

2025

FPCI SURVEY ON ASEAN DIALOGUE PARTNERS

“ The Year of Living Dangerously: ASEAN
Perceptions on Dialogue Partners Amidst
Goeconomic Turbulence

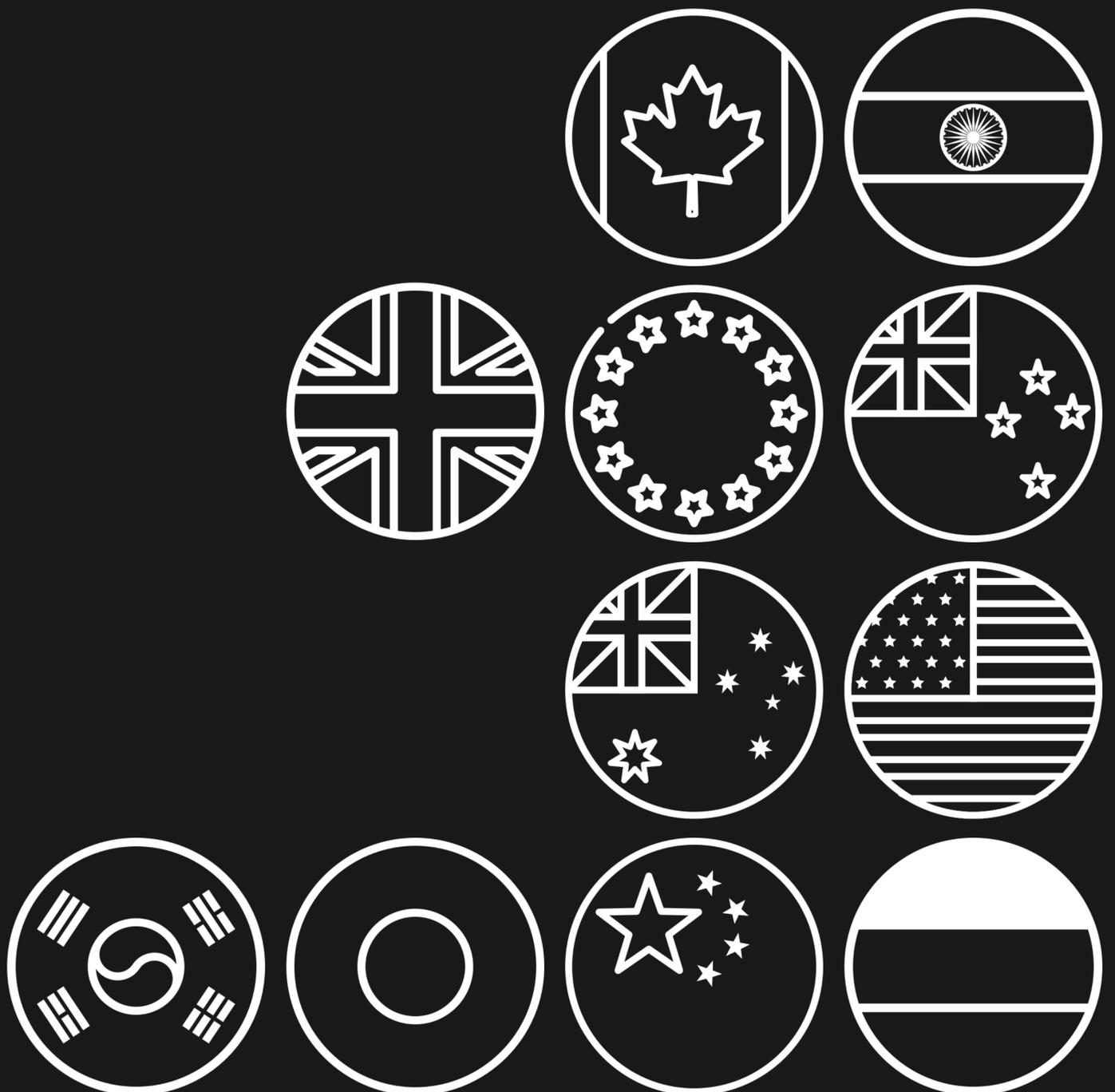


TABLE OF CONTENTS

- 01** Meet The Team

- 02** About FPCI

- 03** About The Survey

- 04** Thank you to the Survey's Supporter and Partners

- 05** Executive Summary

- 06** The 10 Most Important Findings

- 07** Aim and Methodology

- 08** Respondents Profile

- 09** Perception Patterns Across ASEAN Dialogue Partners

- 10** Perception Patterns on Key ASEAN Dialogue Partners Initiatives

- 11** Perception Patterns on Strategic Issues

- 12** Focus Insights on Trump's Tariff

- 13** Policy Recommendation

01

SECTION 01

Meet The Team

CREDITS

Meet the Team

Dr. Dino Patti Djalal

Founder and Chairman of FPCI

Yossi

FPCI Research & Program Associate, Data Officer

Dr. Shofwan Albanna Choiruzzad

FPCI Fellow and Lead Author

Azzizah Mulia Kusumaningrini Kartodirjo

FPCI Research Associate, Partnership Officer

Calvin Khoe

Survey Coordinator, Author

Wahyu Rahmadansyah

FPCI Lead Designer

Research Assistants

Joycelyn Lucinda Bahari · Ulfianti · Rafiqo Fadhlullah · Muhammad Qadri Ramadhan · Muhammad Rizky Darwan

Designers

Mutia Kartika Putri · Francisca Priscilia

02

SECTION 02

About FPCI

Foreign Policy Community of Indonesia

What is FPCI?

Foreign Policy Community of Indonesia (FPCI) is a non-partisan, non-politic and independent foreign policy organization established to discuss and introduce international relations issues to many relevant actors in Indonesia such as diplomats, ambassadors, government officials, academia, researchers, businesses, media, lecturers, think tanks, students and media.

FPCI is also dedicated to study the most-pressing foreign policy issues in relation to ASEAN, geopolitics, middle powers, geo-economics and diaspora. FPCI was formed with the aim of developing Indonesian internationalism, making it more entrenched throughout the archipelago, and projecting itself to the rest of the world.

FPCI is determined to form a large international relations community with mature and sensitive insights on bilateral, regional and global issues. FPCI aims to be a facilitator that can bring the “world” to the region and simultaneously bring grassroots and regional thoughts to the national and world stage.

03

SECTION 03

About The Survey

About The Survey

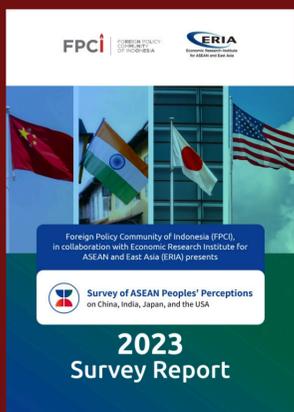
FPCI Research and Analysis (FPCI R&A) launched its survey program in 2020 during the COVID-19 pandemic. The program aims to understand Southeast Asian perceptions of their relationships with key ASEAN partners, formally recognized as ASEAN Dialogue Partners. The study adopts a gradual and strategic approach: rather than beginning with all 11 Dialogue Partners, it initially focused on those deemed most consequential to Southeast Asia's political, economic, and socio-cultural landscape — while still acknowledging the importance of the others.

Over the past five years, this approach has enabled the survey to capture a comprehensive picture of Southeast Asian perceptions toward Dialogue Partners, particularly those exerting significant influence in the Indo-Pacific during and after the pandemic. For Dialogue Partners, the survey offers a clear, a big picture view of how they are positioned in the minds of Southeast Asians.

The output of every edition is two – the survey report and Online Data Table at

www.fpcisurvey.org

This makes the survey results accessible to wider audiences and it becomes open source data for policy and academic purposes.



ASEAN - China Survey
2020 - 2022



FPCI Survey on ASEAN
Dialogue Partners (all 11
ASEAN Dialogue Partners)
2025



2023 - 2024

FPCI-ERIA ASEAN Peoples' Perceptions Survey (2023: China, Japan, India, & USA & 2024: China, Japan, India, USA, UK, EU, Russia, South Korea, Australia)

04

SECTION 04

**Thank you to the Survey's
Supporter and Partners**

THANK YOU FOR THE

Survey's Supporter and Partners

Our sincere appreciation to the Canada Mission for ASEAN for making this survey possible

Canada

We extend our gratitude to the Survey's Partners.



ศูนย์อาเซียนศึกษา
ASEAN STUDIES CENTER
Chulalongkorn University



ASEAN YOUTH
ADVOCATES NETWORK
BRUNEI DARUSSALAM



ສະມາຄົມ ນ້ຳໃຈຊາວບ້ານ
Namjai Community Association



05

SECTION 05

Executive Summary

What is this survey about?

Working together with partners in all ASEAN countries, FPCI conducted the 2025 FPCI Survey on ASEAN Dialogue Partners, aiming to capture the perceptions and attitudes of the people of ASEAN towards ASEAN Dialogue Partners, which consists of Australia, Canada, China, the European Union, India, Japan, New Zealand, the Republic of Korea, Russia, the United Kingdom, and the United States. The online survey was conducted from October 2025 to February 2026, with a total of 2,012 respondents from 11 ASEAN member states.

The year 2025 is a particularly important year to conduct such a survey, since there were important developments in international politics which put ASEAN's relationship with its dialogue partners to test. Among these developments is the implementation of a broad package of tariff by the US President Donald Trump in April 2025, the so-called "reciprocal tariff," and the negotiations that follow. We believe that the 2025 FPCI Survey on ASEAN Dialogue Partners will be beneficial for the public in ASEAN and beyond, since it provides insights and evidence on the shift of perceptions (or lack thereof) of the people of ASEAN towards ASEAN's dialogue partners, especially after such "geopolitical earthquake."

What are the findings?

01

US unilateral tariff policy is not perceived positively in ASEAN. The majority of the respondents (59.15%) views Trump's reciprocal tariff as unfair and unjust. Most of them also believe that the policy harms ASEAN Member States' economies (63.37%) and that it poses risks to international trade (70.33%).

02

Such negative perceptions towards the unilateral tariff affect the perceptions towards US. While more research is needed to claim causality, the survey found that the policy is very possibly harming the US image in the eyes of ASEAN people.

03

Japan retains its position as the dialogue partner with the most positive image. In terms of perception, Japan continues to be ASEAN people's favorite.

04

China is perceived to be more and more important, especially for economic development. On the question of "Which dialogue partner will be most important to ASEAN in the years ahead?," China tops the answer with 38.62%.

05

Some Dialogue Partners have "niche prominence" in ASEAN. Each of the Dialogue Partners have their own "comparative cooperation advantage." While Japan overall leads as the region's favorite and China excels in economic relationship, some dialogue partners have their own strength in the perception of the respondents.

06

There are visible differences in foreign policy orientations among the AMS, especially in terms of their relationships with Great Powers. The perception of the closeness of their government to dialogue partners, especially China and the US, reflect the different foreign policy orientation among the AMS.

07

There are unmet expectations on the contribution and role of AMS as well as dialogue partners in various strategic issues. When asked to assess which AMS or dialogue partners contribute positively to various pressing global issues, "none" was among the most frequent answers.

08

There is anxiety about the future of multilateral trade. The respondents' assessments on the contribution of dialogue partners and AMS towards pressing global issues are not only reflecting unmet expectations, but also increasing anxieties. This impression is even more visible when we are looking at the issue of tariffs.

09

Call for Collective Position. The respondents strongly support collective position for ASEAN in responding to US tariff policy.

10

Aspiration for strengthening multilateralism and diversification. The people of ASEAN see reinvigorating multilateralism and diversification as the pathways forward.

Findings & Recommendations

Based on the spirit of “people-centred ASEAN” and the findings from the 2025 FPCI Survey on ASEAN Dialogue Partners, we propose these following recommendations:

- 1 ASEAN should develop a long-term collective strategy to navigate the increasing geopolitical and geoeconomic tensions.
- 2 ASEAN should identify its economic vulnerabilities, including dependencies and choke points.
- 3 ASEAN and its dialogue partners need to work together to develop trust and cooperation.
- 4 ASEAN and its dialogue partners need to work closer and deeper to reinvigorate and strengthen multilateralism, including through creating stronger networks of regional trade agreements.
- 5 ASEAN and its dialogue partners can help each other to diversify their political and economic relations.
- 6 ASEAN’s dialogue partners can optimize their presence, impact, and benefit from their cooperation with ASEAN by leveraging their “comparative cooperation advantage.”

06

SECTION 06

10 Key Takeaways from the 2025 FPCI Survey on ASEAN Dialogue Partners

10 KEY TAKEAWAYS

This 2025 survey is conducted amidst the struggle of many ASEAN member states in navigating the increasingly turbulent world, especially after the announcement of a broad package of tariff by the US President Donald Trump in April 2025 and its geoeconomics implications. As a group, the AMS attempted to align their responses through ASEAN, including through the establishment of the geoeconomics task force. Although there is no united negotiation front as in their European counterpart because the AMS are negotiating with the US through bilateral mechanisms, the AMS generally follow a similar general position. They avoid retaliation while at the same time also attempting to maintain strategic autonomy.

However, ASEAN leaders understand that the challenge is not confined to a specific set of tariffs enacted by one specific country. This is a symptom of a larger structural shift in global politics with profound consequences for ASEAN. ASEAN leaders continue to raise their concerns about the danger of unilateral tariff and the risk of collapse of the multilateral trade regime. ASEAN is also calling for more ASEAN agency in shaping the global dynamics, including in ensuring the resilience of the global trade system, which necessitates ASEAN to strengthen its unity and centrality. This also means that ASEAN needs to work closer with its partners.

Against this backdrop, we believe that the 2025 FPCI Survey on ASEAN Dialogue Partners will be beneficial for the public in ASEAN and beyond, since it provides insights and evidences on the shift of perceptions (or lack thereof) of the people of ASEAN towards ASEAN's dialogue partners, especially after such "geopolitical earthquake."

- 1 Trump's "Liberation Day" is not perceived positively in ASEAN
- 2 Such negative perceptions towards the unilateral tariff affect the perceptions towards US
- 3 Japan retains its position as the dialogue partner with the most positive image
- 4 China is perceived to be more and more important, especially for economic development
- 5 Some Dialogue Partners have "niche prominence" in ASEAN
- 6 There are visible differences in foreign policy orientations among the AMS
- 7 There are unmet expectations on the contribution and role of AMS as well as dialogue partners
- 8 There is anxiety about the future of multilateral trade
- 9 Call for Collective Position
- 10 Aspiration for strengthening multilateralism and diversification

Trump's "Liberation Day" is not perceived positively in ASEAN

While there is no ASEAN country choosing the confrontative "retaliation" path, ASEAN leaders continue to carefully raise their concerns about the danger of unilateral tariff. It shows that Trump's tariff policy is not perceived positively in the region, although the AMS are forced to adapt to avoid Washington's fury. One important takeaway from the 2025 survey is that such negative perception is not only limited among the ASEAN leaders, but also seeping through different segments of the ASEAN people.

The survey found that the **majority of the respondents (59,15%) views Trump's reciprocal tariff as unfair and unjust** (30.07% of the respondents strongly disagree and 29.08% of them disagree with the statement that "reciprocal tariff announced by President Trump on April 2, 2025 and the subsequent negotiation is fair and just"). Moreover, **a larger number of respondents (63.37%) believe that the policy harms ASEAN Member States' economies and an even larger number of them believe that it poses risks to international trade (70.33%)**.

Q14: The so-called reciprocal tariff announced by President Trump on April 2, 2025 and the subsequent negotiation is fair and just.



Q16: The US reciprocal tariff is hurting my country's economy.



Q17: The US reciprocal tariff is dangerous for international trade.



Such negative perceptions towards the unilateral tariff affect the perceptions towards US.

While more research is needed to claim causality, the survey found that the policy is very possibly harming the US image in the eyes of ASEAN people. **29.87% of the respondents answered “strongly agree” while 32.16% of them “agree” to the statement that the policy affects their perceptions towards the US significantly.** This is also indicated by the answers on the question on which dialogue partner is considered as the most trustworthy. **Those who answer the US as the most trusted partner/friend declines from 10.65% in the 2024 survey to 5.47% in the 2025 survey.** As a comparison, the European Union stays at around 13%, while China rises from 10.45% to 12.28%. On the question of **which partner the respondents’ respect most, the number also shows a similar decline.** In the 2024 survey, the number was 13.31%. In 2025, it is at 6.16%. China gets a boost: from 9.22% in 2024 of respondents to 12.08% in 2025.

62.03%

agree tariff affected US perception

Most Trusted: US

2024 2025
10.65% → 5.47%

↓ decline

Most Trusted: China

2024 2025
10.45% → 12.28%

↑ increase

Most Respected: US

2024 2025
13.31% → 6.16%

↓ decline

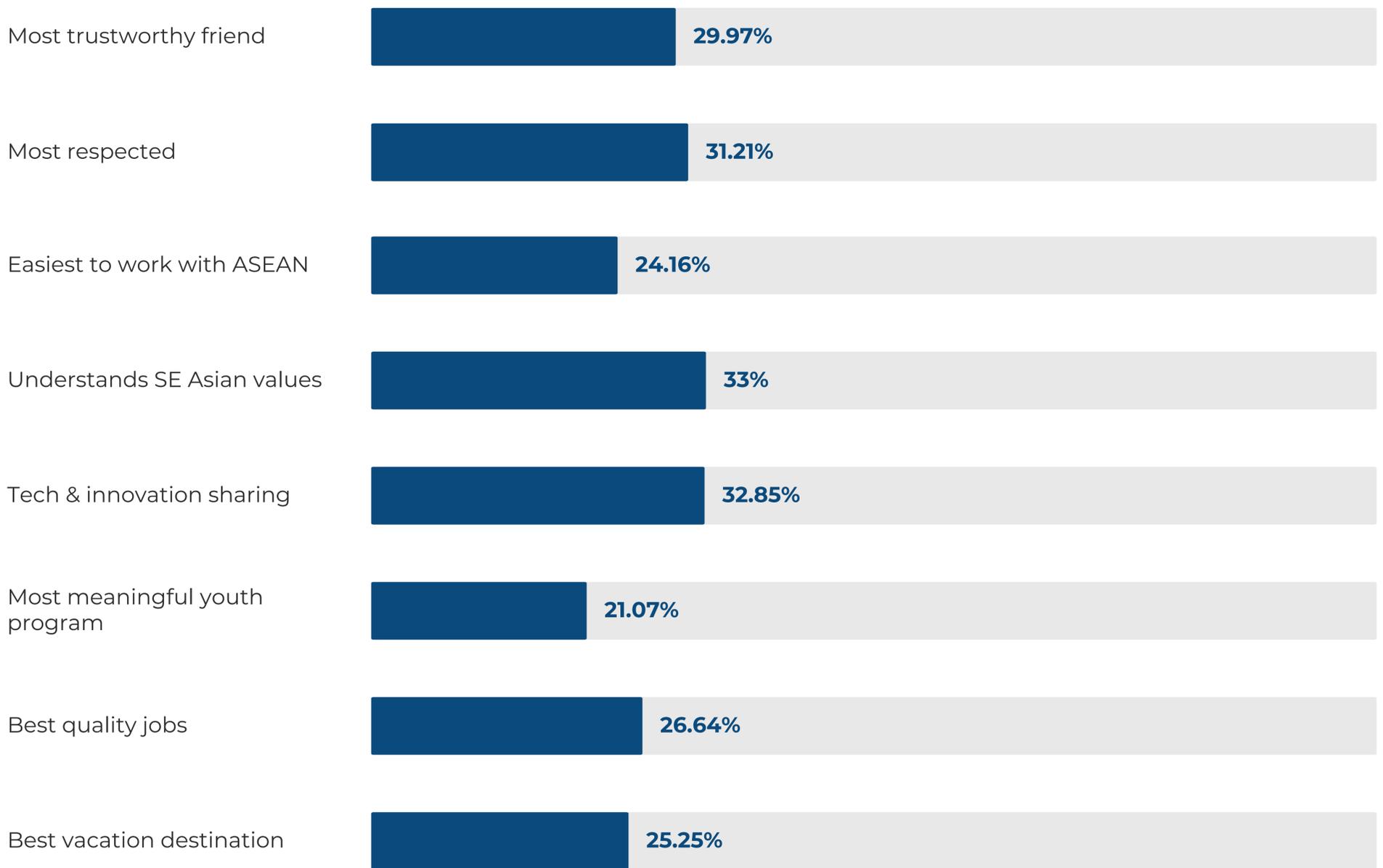
Most Respected: China

2024 2025
9.22% → 12.08%

↑ increase

Japan retains its position as the dialogue partner with the most positive image.

In terms of perception, Japan continues to be ASEAN people's favorite. It tops the answers on "the most trustworthy," "the most respected," "the easiest to talk and to work with ASEAN," "most genuinely understands and respects Southeast Asian values," "most generously sharing their technology and innovation," "most meaningful youth program," "creates the best quality jobs in Southeast Asia through its investments and companies," and most favorited "vacation destination."

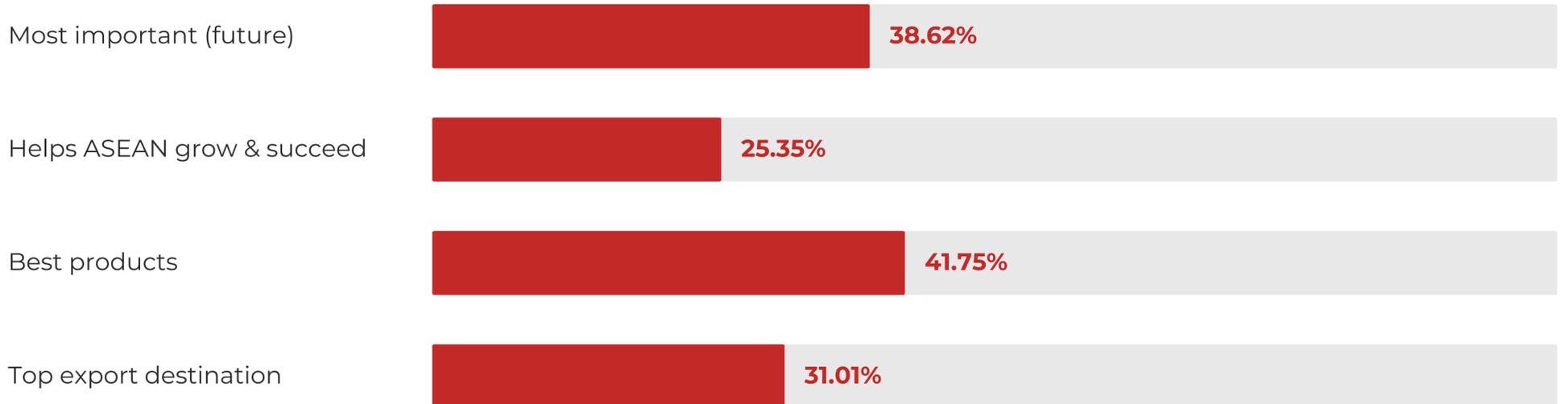


China is perceived to be more and more important, especially for economic development.

On the question of "Which dialogue partner will be most important to ASEAN in the years ahead?," China tops the answer with 38.62%. This is an increase from 31.95% in 2024. This is correlated with the perception that China provides significant contribution towards ASEAN Member Countries economic development. China might not be the top answer for "the most trustworthy" or "the easiest to talk and work with ASEAN," but it is topping the answers on "consistently helps ASEAN grow and succeed," "sells products to Southeast Asia that are most useful and worth the money," and "export destination."

38.62% in 2025

(up from 31.95% in 2024)



Some Dialogue Partners have "niche prominence" in ASEAN. Each of the Dialogue Partners have their own "comparative cooperation advantage."

While Japan overall leads as the region's favorite and China excels in economic relationship, some dialogue partners have their own strength in the perception of the respondents. Australia is considered as the top destination for "university education" and for "working abroad," while the Korean Wave makes RoK's cultural products as the most consumed (with the US as the second). The EU is considered as a leading partner in environmental issues and education. As for Canada, respondents suggest ASEAN to partner with Ottawa in Transnational Crimes, Disaster Response/Relief, and Green Economy. In leading up to the implementation of Digital Economic Framework Agreement (DEFA), India is the key partner for digital transformation suggested by respondents. Russia also appeared to be an alternative dialogue partner for the supply chain. Hence, all dialogue partners were viewed positively in advancing ASEAN in the niche sector.

Transnational Crimes	USA (25.94%)
Disaster Relief	Japan (41.75%)
Education	EU (18.59%)
Climate Change	EU (36.58%)
Digital Transformation	China (28.43%)
Green Economy	EU (30.57%)
Cultural Exchange	Japan (22.91%)
Food Security	Japan (19.68%)
Creative Economy	S. Korea (21.62%)
Supply Chain	China (31.26%)

There are visible differences in foreign policy orientations among the AMS, especially in terms of their relationships with Great Powers.

With the increasing geopolitical and geoeconomic tension, it is interesting to look at the foreign policy orientation of each AMS, particularly in regards to their relationship with Great Power. While many observers have argued that ASEAN countries are divided into leaning to the US, leaning to China, and the relatively balanced ones, our survey tries to capture this picture by asking how close their governments are to each of the dialogue partners, including China and the US. When comparing perceptions in each country, we see that the perception of the closeness of their government to dialogue partners, especially China and the US, reflect the different foreign policy orientation among the AMS.

In your opinion, how close is your government to US and China?

Country	US Very Close	US Close	China Very Close	China Close	Diff (China-US)	Position
Indonesia	24.67%	42.65%	45.42%	33.99%	(+) 12.09%	Tilting to China
Malaysia	27.06%	35.29%	51.18%	34.71%	(+) 23.54%	Tilting to China
Brunei	14.89%	41.49%	46.81%	34.04%	(+) 24.47%	Tilting to China
Singapore	29.13%	25.98%	24.41%	24.41%	(-) 6.29%	Tilting to USA
the Philippines	50.57%	31.03%	17.82%	21.84%	(-) 41.94%	Tilting to USA
Timor Leste	28.46%	17.89%	25.20%	27.64%	(+) 6.49%	Tilting to China
Thailand	25.33%	42.67%	50.67%	40.00%	(+) 22.67%	Tilting to China
Cambodia	17.65%	50.74%	60.29%	22.79%	(+) 14.69%	Tilting to China
Lao PDR	11.71%	24.39%	56.59%	21.46%	(+) 41.95%	Tilting to China
Viet Nam	21.90%	31.43%	26.67%	29.52%	(+) 2.86%	Balanced
Myanmar	19.83%	20.69%	49.14%	18.10%	(+) 26.72%	Tilting to China

■ The most tilt to the USA

■ The most tilt to China

■ The most balanced

There are unmet expectations on the contribution and role of AMS as well as dialogue partners in various strategic issues.

There is a visible unmet expectation in ASEAN and its partners in its contribution to various global issues. When asked to assess which AMS or dialogue partners contribute positively to various pressing global issues, "none" was among the most frequent answers. It is interesting to note that among the dialogue partners, the EU tops the answers on the positive contributor in some of the issues. This position is quite similar to perceptions in Singapore among the AMS.

Q12 From the following issues, which dialogue partners, in your view, positively contribute to addressing the problems/conflicts.

	AU	CA	CN	EU	IN	JP	NZ	RU	KR	UK	US	None
War in Gaza	4.77%	1.59%	10.79%	22.61%	3.03%	3.98%	2.19%	6.61%	1.24%	2.34%	19.68%	21.17%
Myanmar crisis	3.98%	2.78%	15.51%	12.03%	5.37%	7.9%	2.34%	3.93%	1.34%	2.63%	11.63%	30.57%
Thai-Cambodia conflict	3.48%	1.89%	14.21%	6.86%	5.86%	6.81%	1.84%	2.73%	2.68%	1.39%	24.95%	27.29%
Cross-Strait relations	4.32%	1.89%	10.29%	12.57%	2.39%	9.54%	2.88%	3.48%	2.93%	3.08%	14.71%	31.91%
War in Ukraine	1.79%	1.29%	4.32%	26.24%	2.58%	3.33%	4.77%	13.87%	2.63%	2.83%	18.79%	17.54%
South China Sea	4.27%	0.99%	17.74%	7.06%	2.34%	8.65%	2.53%	6.31%	3.73%	2.49%	18.79%	25.1%
Climate change	6.11%	3.13%	6.51%	38.67%	2.53%	11.48%	6.41%	2.68%	4.97%	4.17%	6.31%	7.01%
Rules-Based Order	4.62%	2.88%	6.96%	28.08%	2.04%	6.46%	3.28%	4.87%	3.58%	5.57%	13.52%	18.14%
Energy Transition	3.93%	2.58%	16.25%	24.25%	2.78%	17.1%	3.78%	5.47%	4.72%	3.73%	6.81%	8.6%
Trade War	3.08%	1.74%	17.94%	15.46%	2.49%	5.77%	2.34%	3.98%	3.58%	3.73%	20.03%	19.88%
Global trade uncertainties	2.44%	2.04%	16.95%	15.01%	2.83%	7.55%	3.58%	3.93%	3.03%	4.47%	19.14%	19.04%
Digital & Cyber disruption	3.13%	1.74%	13.77%	12.38%	5.02%	10.64%	3.43%	4.62%	9.69%	4.67%	17.05%	13.87%
Food Security	9.54%	2.98%	11.48%	14.86%	6.36%	15.85%	6.41%	4.37%	5.22%	3.08%	7.21%	12.62%
Transnational Crime	7.65%	1.84%	9%	14.51%	2.68%	4.97%	3.23%	6.86%	4.72%	5.47%	23.51%	15.56%
Human Rights	6.36%	4.03%	2.88%	33.4%	1.59%	5.67%	5.52%	3.53%	4.47%	5.17%	13.37%	14.02%

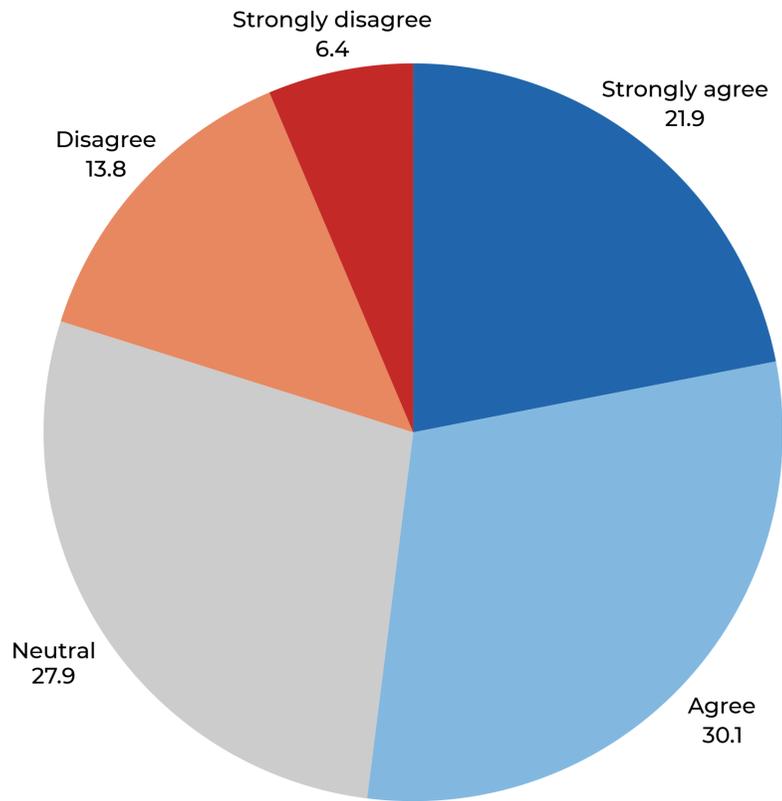
Q13 From the following issues, which ASEAN member states, in your view, positively contribute to addressing the problems/conflicts.

	BN 	KH 	ID 	LA 	MY 	MM 	PH 	SG 	TH 	VN 	TL 	None
War in Gaza	4.27%	2.49%	32.75%	3.23%	20.87%	1.64%	1.84%	5.57%	1.94%	0.89%	1.19%	23.31%
Myanmar crisis	1.74%	5.12%	19.38%	4.82%	14.86%	10.88%	2.78%	6.16%	11.38%	0.99%	1.64%	20.23%
Thai-Cambodia conflict	1.29%	3.53%	14.12%	5.57%	28.63%	3.53%	2.83%	5.27%	11.23%	3.33%	0.89%	19.78%
Cross-Strait relations	1.34%	1.44%	10.93%	3.58%	11.68%	3.88%	6.36%	19.93%	4.67%	2.14%	1.29%	32.75%
War in Ukraine	1.14%	1.54%	16.2%	2.29%	7.55%	4.03%	5.27%	12.77%	4.47%	2.39%	2.14%	40.21%
South China Sea	1.29%	1.84%	14.86%	2.58%	7.75%	2.78%	17.79%	10.79%	4.52%	8.95%	1.49%	25.35%
Climate change	1.84%	1.74%	11.13%	1.94%	5.52%	1.74%	6.06%	36.48%	8%	4.82%	2.19%	18.54%
Rules-Based Order	1.34%	1.89%	13.07%	1.99%	9.29%	2.04%	5.02%	29.27%	6.01%	5.07%	2.34%	22.66%
Energy Transition	2.09%	1.94%	9.39%	3.83%	7.75%	2.49%	3.33%	34.94%	5.96%	7.85%	3.28%	17.15%
Trade War	1.49%	2.09%	9.69%	2.19%	7.95%	3.28%	3.18%	27.09%	6.46%	8.4%	2.39%	25.8%
Global trade uncertainties	1.19%	1.89%	9.64%	2.93%	7.9%	2.78%	4.82%	28.13%	6.11%	6.01%	1.89%	26.69%
Digital & Cyber disruption	1.34%	2.58%	6.36%	2.09%	6.61%	2.68%	3.83%	42.64%	6.51%	3.93%	1.89%	19.53%
Food Security	1.94%	2.19%	12.52%	2.44%	7.6%	2.49%	3.78%	15.31%	21.37%	10.04%	1.59%	18.74%
Transnational Crime	1.54%	4.67%	9.24%	2.24%	9.15%	3.53%	5.57%	21.22%	11.43%	4.92%	2.04%	24.45%
Human Rights	2.44%	2.04%	13.92%	1.54%	8.15%	3.73%	6.86%	17.2%	8.2%	3.38%	5.77%	26.79%

KEY FINDING 8 OF 10

There is anxiety about the future of multilateral trade

The respondents' assessments on the contribution of dialogue partners and AMS towards pressing global issues are not only reflecting unmet expectations, but also increasing anxieties. This impression is even more visible when we are looking at the issue of tariffs. More than half of the respondents agree or strongly agree that the US tariff marks the end of the World Trade Organization (WTO) and the multilateral trading system.



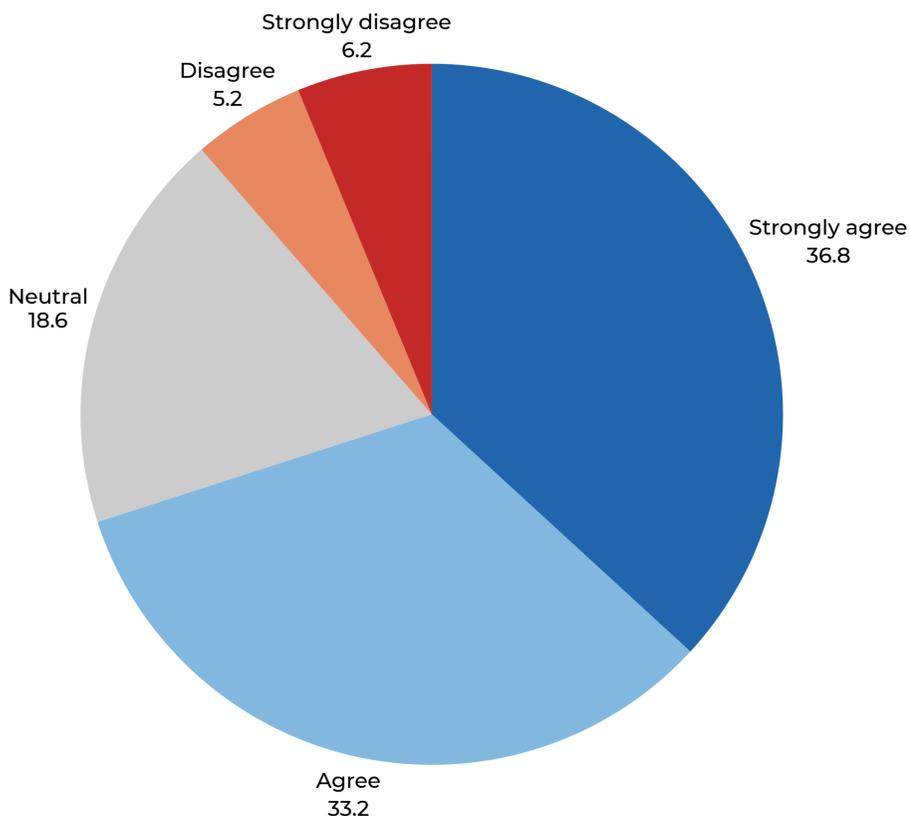
51.99%

Agree/strongly agree that US tariff marks the end of WTO and the multilateral trading system

KEY FINDING 9 OF 10

Call for Collective Position

While respondents are generally careful in assessing their government's handling of the negotiation of the US reciprocal tariff (majority are in "neutral" position), they strongly support collective position for ASEAN.



70.03%

Agree/strongly agree that ASEAN needs a collective position in response to US tariff policy

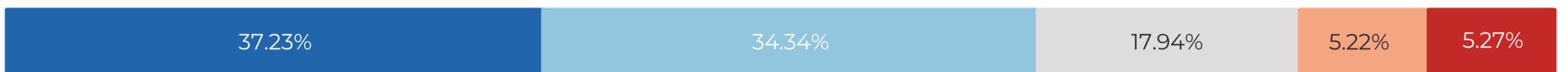
Aspiration for strengthening multilateralism and diversification

The anxiety about the fate of the multilateral trading system and multilateralism should not be understood as fatalistic pessimism. The people of ASEAN see the need to strengthen multilateralism by working together with other groupings such as the EU and the CP TPP. Another consensus is the view that ASEAN needs to diversify its economic relations.

Q21 My country needs to diversify our trade relations.



Q25 ASEAN needs to work together with the EU to save an open and free multilateral trading system.



Q26 ASEAN needs to work together with CP TPP countries to save open and free multilateral trading system.



07

SECTION 07

Aim and Methodology

Aim & Survey Context

Why 2025 matters for ASEAN–Dialogue Partner perceptions

Survey Aim

This survey study aims to capture the perceptions and attitudes of the people of ASEAN towards ASEAN Dialogue Partners. The year 2025 is a particularly important year to conduct such a survey, since there were important developments in international politics which put ASEAN’s relationship with its dialogue partners to test. Among these developments is the implementation of a broad package of tariff by the US President Donald Trump in April 2025, the so-called “reciprocal tariff,” and the negotiations that follow. Since ASEAN countries were among the countries targeted with the highest rates of US tariff, we are wondering how this will affect the perceptions of the people of ASEAN towards the United States, China, and other dialogue partners.

The 2025 Context: Trump’s Reciprocal Tariff

The 2025 survey comes at a critical juncture. ASEAN countries were among the nations targeted with the highest rates of US tariff under the so-called “reciprocal tariff” policy announced by President Donald Trump in April 2025.

This development put ASEAN’s relationships with its 11 Dialogue Partners to a significant test. The survey therefore includes a dedicated section on perceptions towards the US tariff policy, examining how it shapes ASEAN peoples’ views of the United States, China, and other Dialogue Partners.

Apart from tariff perceptions, the survey examines trustworthiness, importance, cooperation sectors, and strategic issues across all 11 Dialogue Partners for the first time.

Question Design & Development

The questions are developed by the survey team and sharpened through a series of Focused Group Discussions (FGD) involving a panel of experts from ASEAN countries.

The questions are categorized into four sections:

- ▶ Section 1 compares relative perceptions towards different ASEAN Dialogue Partners, including preferred partners for specific sectors.
- ▶ Section 2 evaluates the state of cooperation between countries, assessing how close governments are to each Dialogue Partner.
- ▶ Section 3 covers familiarity and evaluation of different collaboration initiatives.
- ▶ Section 4 captures views on trade tensions and US tariff-related issues.

2,012

Respondents

11

ASEAN Member States

11

Dialogue Partners

26

Survey Questions

5

Respondent Categories

Survey period: October 2025 – February 2026 · Online survey, fielded electronically across all 11 ASEAN Member States

Methodology & Sampling

Purposive sampling across 11 ASEAN member states

Sampling Strategy

This research adopts a purposive sampling strategy by targeting five categories of respondents identified as important in shaping public discourse and policymaking in ASEAN countries:

(1) Government Officials · (2) Academia & Think Tanks · (3) Business Community · (4) Civil Society · (5) Students

Categories (1)–(4) are collectively classified as the “Elites” group. To allow comparisons, the FPCI team set a minimum target number of respondents for each category.

Target & Coverage

The FPCI team set a target of 2,000 respondents. The final sample achieved 2,012 participants from all 11 ASEAN Member States:

Brunei Darussalam · Cambodia · Indonesia · Lao PDR · Malaysia · Myanmar · Philippines · Singapore · Thailand · Vietnam · Timor-Leste

Respondents identified in each country were allocated proportionately. The survey attempts to ensure that each country and category are represented fairly.

Data Collection & Process

Data were collected through an online survey, fielded electronically from October 2025 to February 2026. The survey aimed to:

- ▶ Assess Southeast Asian perceptions toward ASEAN’s Dialogue Partners
- ▶ Identify key challenges and opportunities for cooperation
- ▶ Evaluate perceptions of risk, threats, and shared interests in regional affairs
- ▶ Capture regional views on emerging trade tensions and tariff-related issues

Completion was designed to take 15 minutes or less to increase response likelihood.

Quality Assurance & FGD

An initial report was presented to a panel of ASEAN experts from ASEAN Member Countries in a closed and intensive Focus Group Discussion (FGD). The FGD was conducted under the Chatham House Rule — participants are not identified and their comments are not attributed directly.

Note: There was an extension of the survey collection process as the target number took longer than expected to achieve. A “survey fatigue” was observed among respondents. This concern will be seriously addressed in the design of the 2026 survey.

Insights from FGD participants are significantly integrated into this final report.

08

SECTION 08

Respondent Profile

Q1

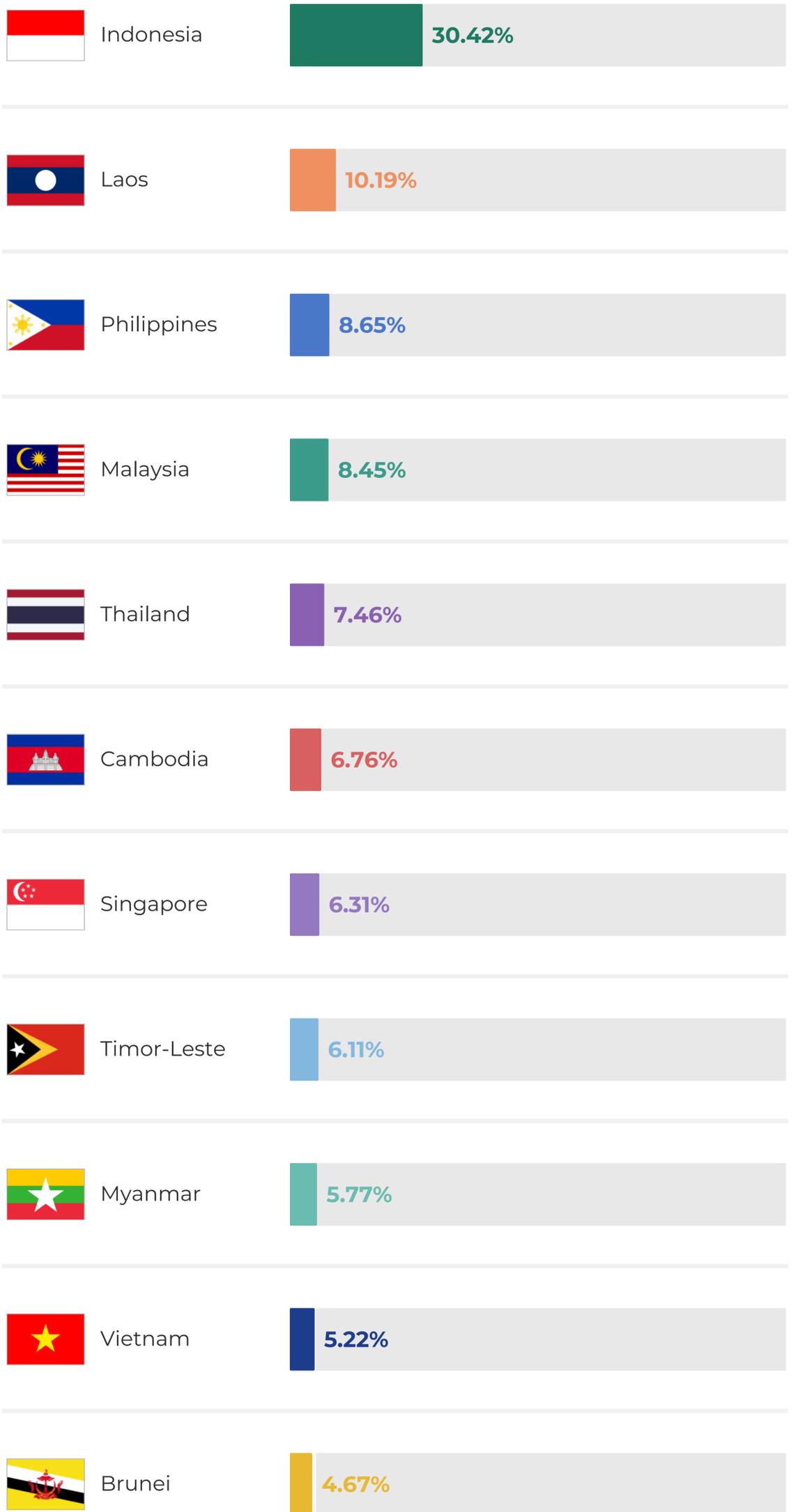
Nationality

30.42%

Indonesia

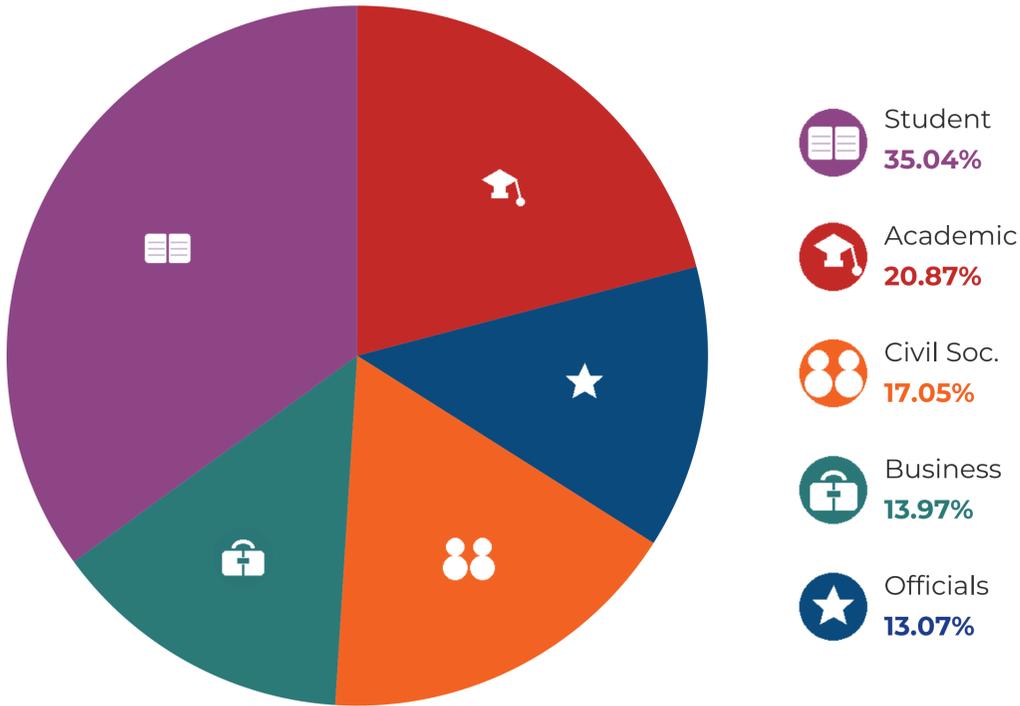
The **FPCI Survey on ASEAN Dialogue Partners 2025** collected responses from **2,012 participants**, slightly fewer than the 2,028 respondents in the 2024 FPCI-ERIA ASEAN Peoples' Perceptions Survey (APPS 2024).

Respondents came from five groups — **Academics, Officials, the Business Community, Civil Society, and Students** (International Relations/International Law/International Business) and represented all **11 ASEAN member states**.



Indonesia represents 30.42% of respondents — more than double Laos (10.19%), reflecting FPCI's regional hub in Jakarta.

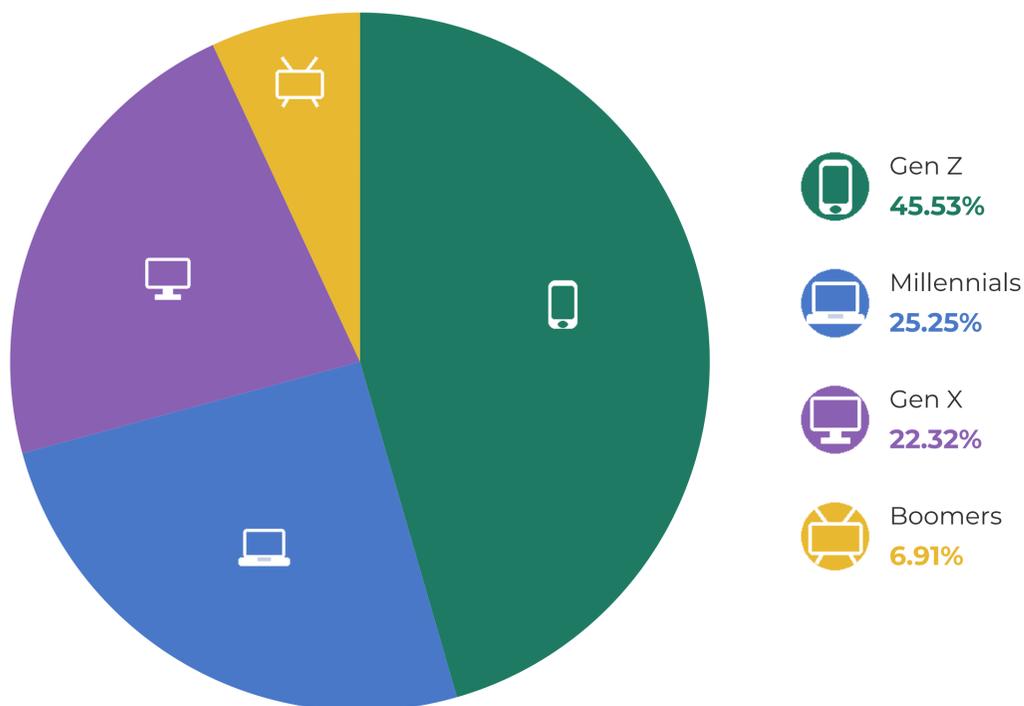
Q2 What is your affiliation?



Students — the largest group

35.04%

Q3 What is your generation?



Gen Z — the largest generational cohort

45.53%

By group, **students formed the largest share at 35.04%**, followed by **academics at 20.87%**. The **elite group** (Officials, Academics, Business Community, and Civil Society) collectively accounted for **64.96%** of the sample. This matters because the elite group is generally more knowledgeable and experienced in regional affairs than the student group.

By nationality, **Indonesia remained the largest contributor with 30.42%**, followed by **Lao PDR at 10.19%**, while **Brunei Darussalam had the smallest share at 4.67%**. Compared with the actual population distribution of Southeast Asia, the survey obtained sufficient samples from **Indonesia, Malaysia, Lao PDR, Timor-Leste, Brunei, Cambodia, Singapore, Thailand, and Myanmar**, but remained **under-represented in the Philippines and Viet Nam**. This pattern reflects the typical dynamics of online, network-based surveys, where institutional reach and respondent accessibility shape participation more than population size.

For the first time, the survey included a question on generational classification—Gen Z (1997–2012), Millennials (1981–1996), Gen X (1965–1980), and Boomers (1946–1964). The results show that **Gen Z** forms the largest group at **45.53%**, followed by **Millennials** at **25.25%**, **Gen X** at **22.32%**, and **Boomers** at **6.91%**, making them the smallest cohort in the sample.

By gender, the survey achieved a balanced distribution, with **male** respondents at **51.19%** and **female respondents** at **48.81%**. Overall, the survey reflects a **predominantly young respondent population with near-equal gender representation**.

Q4 What is your gender?

51.19%



Male

48.81%



Female

09

SECTION 09

Perception Patterns Across ASEAN Dialogue Partners

Question 5

In your perspective, which Dialogue Partner below best represents the following statements:

Question 5 asked respondents to evaluate the dialogue partners across a wide range of attributes—trustworthiness, respect, importance, and overall benefit—as well as everyday, lifestyle-related perceptions such as which partner offers the most attractive universities, products, job quality, and entertainment (TV shows or movies). Across the 18 sub-questions, **Japan and China consistently emerged as the top-of-mind partners, while India and Canada ranked the least in respondents' perceptions.**

	AU	CA	CN	EU	IN	JP	NZ	RU	KR	UK	US
											
Which dialogue partner is ASEAN's most trustworthy friend?	16.2%	2.83%	12.28%	13.22%	4.62%	29.97%	4.32%	4.52%	4.13%	2.44%	5.47%
Which dialogue partner do you think consistently helps ASEAN grow and succeed?	10.83%	2.34%	25.35%	11.58%	2.09%	24.9%	4.08%	2.19%	3.88%	3.93%	8.85%
Which dialogue partner that you respect the most for how it treats ASEAN?	13.02%	3.38%	12.08%	11.63%	3.43%	31.21%	4.17%	4.42%	4.82%	5.67%	6.16%
Which dialogue partner feels like the easiest to talk to and work with for ASEAN?	16.95%	4.37%	16.45%	8.45%	4.52%	24.16%	5.47%	3.43%	7.21%	4.47%	4.52%
Which dialogue partner will be most important to ASEAN in the years ahead?	6.76%	2.24%	38.62%	12.97%	3.88%	9.34%	3.03%	4.22%	3.98%	2.78%	12.18%
Which dialogue partner do you think helps ASEAN improve things that matter to ordinary people—like trade, jobs, or public health?	10.54%	3.58%	21.82%	15.51%	2.29%	19.93%	3.73%	2.73%	5.17%	4.62%	10.09%
Which dialogue partner that you think is trying to change the way countries cooperate globally?	4.77%	2.39%	24.9%	14.31%	2.73%	5.32%	2.83%	3.93%	3.43%	3.43%	31.96%
Which dialogue partner do you believe genuinely understands and respects Southeast Asian values?	11.28%	3.58%	13.47%	10.49%	4.17%	33%	4.92%	4.92%	5.52%	3.53%	5.12%
Which dialogue partner sells products to Southeast Asia that are most useful and worth the money?	4.37%	2.29%	41.75%	6.51%	2.83%	17.94%	2.49%	2.19%	8.35%	2.93%	8.35%
Which dialogue partner country offers the most attractive university education for Southeast Asians?	22.81%	3.48%	7.60%	14.36%	3.03%	9.05%	4.67%	2.39%	3.98%	14.86%	13.77%
Which dialogue partner is the most generous in sharing their technology and innovation to Southeast Asia?	4.57%	2.39%	22.07%	7.95%	4.13%	32.85%	2.39%	4.37%	8.15%	3.08%	8.05%
Which dialogue partner creates the most meaningful youth programs in Southeast Asia?	14.51%	3.58%	8.25%	14.81%	2.39%	21.07%	3.48%	3.18%	9.99%	4.67%	14.07%
Which dialogue partner comes to mind first when you think about exporting Southeast Asia goods and services?	6.46%	2.83%	31.01%	15.51%	3.78%	11.28%	3.68%	2.98%	4.47%	2.63%	15.36%
Which dialogue partner creates the best quality jobs in Southeast Asia through its investments and companies?	9.19%	3.93%	13.57%	13.97%	2.49%	26.64%	4.27%	1.79%	5.96%	4.67%	13.52%
Which of these dialogue partners would you choose if you have an opportunity to work abroad?	19.58%	5.22%	6.11%	19.53%	1.39%	13.82%	8.40%	3.13%	5.27%	8.05%	9.49%
Which country's movies or TV dramas do you enjoy the most?	2.49%	1.39%	9.74%	3.53%	3.58%	8.50%	2.44%	2.78%	34.59%	5.32%	25.65%
Which dialogue partner's culture has strong influence on ASEAN?	2.63%	1.29%	22.37%	5.72%	4.37%	13.17%	2.09%	2.78%	27.44%	3.18%	14.96%
Which dialogue partner would you be most excited to visit for a vacation?	5.82%	3.98%	6.36%	19.04%	2.04%	25.25%	13.17%	5.37%	6.36%	6.56%	6.06%

Question 6

In the following sector of cooperation, which dialogue partner do you think ASEAN should prioritize working with?

Question 6 asked respondents to evaluate priority cooperation sectors between ASEAN and its Dialogue Partners, covering areas such as transnational crime, disaster response and relief, education, climate change, and supply chain resilience. The survey finds that the **European Union (EU), China, and Japan** are the top three preferred partners across different sectors.

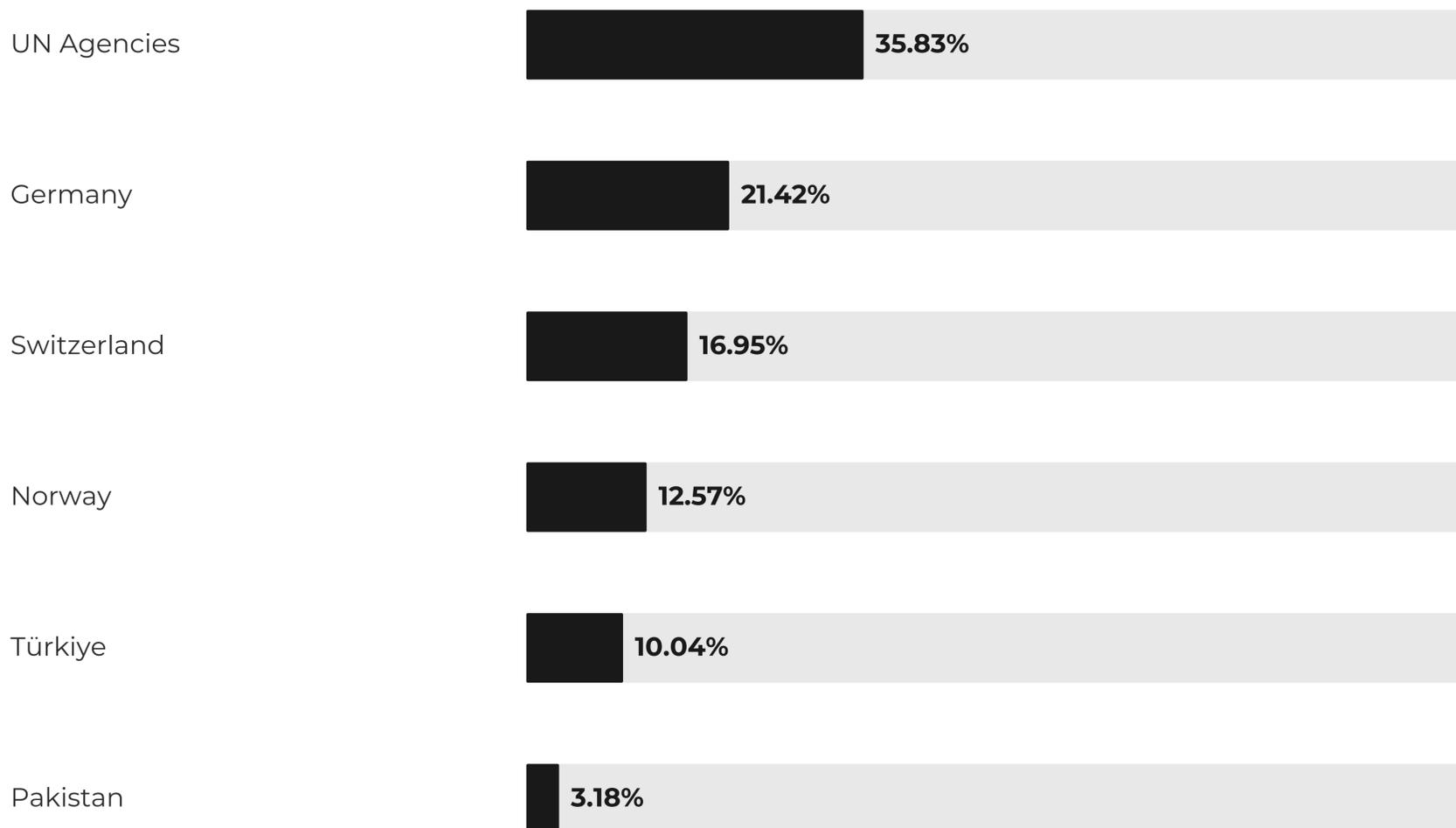
Respondents most frequently recommended the **EU** for cooperation in **education, climate change, and the green economy**. For **China**, respondents prioritized **digital transformation, the creative economy, and supply chain resilience**. In the case of **Japan**, respondents highlighted **disaster response and relief, cultural exchanges, and food security** as the key sectors for cooperation.

	AU	CA	CN	EU	IN	JP	NZ	RU	KR	UK	US
Transnational crimes	11.98%	5.72%	19.18%	14.61%	4.47%	4.92%	1.89%	6.51%	2.24%	2.53%	25.94%
Disaster response/relief	10.19%	5.12%	10.54%	11.43%	3.93%	41.75%	3.23%	2.53%	2.24%	1.59%	7.46%
Education	16.5%	4.27%	12.18%	18.59%	2.49%	12.67%	5.07%	1.54%	2.24%	13.67%	10.79%
Climate change	8.2%	4.77%	8.85%	36.58%	3.13%	14.91%	9.39%	2.53%	3.13%	3.23%	5.27%
Digital transformation	2.49%	1.74%	28.43%	8.1%	8.65%	17.2%	2.09%	2.83%	11.63%	2.83%	14.02%
Green economy	6.71%	5.67%	11.28%	30.57%	2.44%	17.05%	12.33%	3.18%	4.87%	2.63%	3.28%
Cultural exchange	4.57%	2.53%	10.34%	13.72%	4.77%	22.91%	7.41%	4.92%	18.34%	4.37%	6.11%
Food security	11.13%	2.98%	14.76%	13.27%	6.06%	19.68%	8.65%	5.77%	6.11%	3.73%	7.85%
Creative economy	3.73%	2.68%	22.17%	9.74%	2.39%	12.03%	3.73%	5.12%	21.62%	4.52%	12.28%
Supply chain resilience	4.82%	2.88%	31.26%	11.98%	3.63%	13.37%	2.88%	5.67%	6.81%	5.07%	11.63%

Question 7

Which ASEAN sectoral partner that you think should be the 12th ASEAN dialogue partner?

Question 7 asked respondents to recommend a candidate for the **12th ASEAN Dialogue Partner**. The most frequent recommendation was **United Nations agencies (35.83%)**; however, UN agencies are **not eligible** to become ASEAN Dialogue Partners under ASEAN rules. Focusing only on countries, **Germany emerged as the top choice, also at 35.83%**.



21.42%

Germany

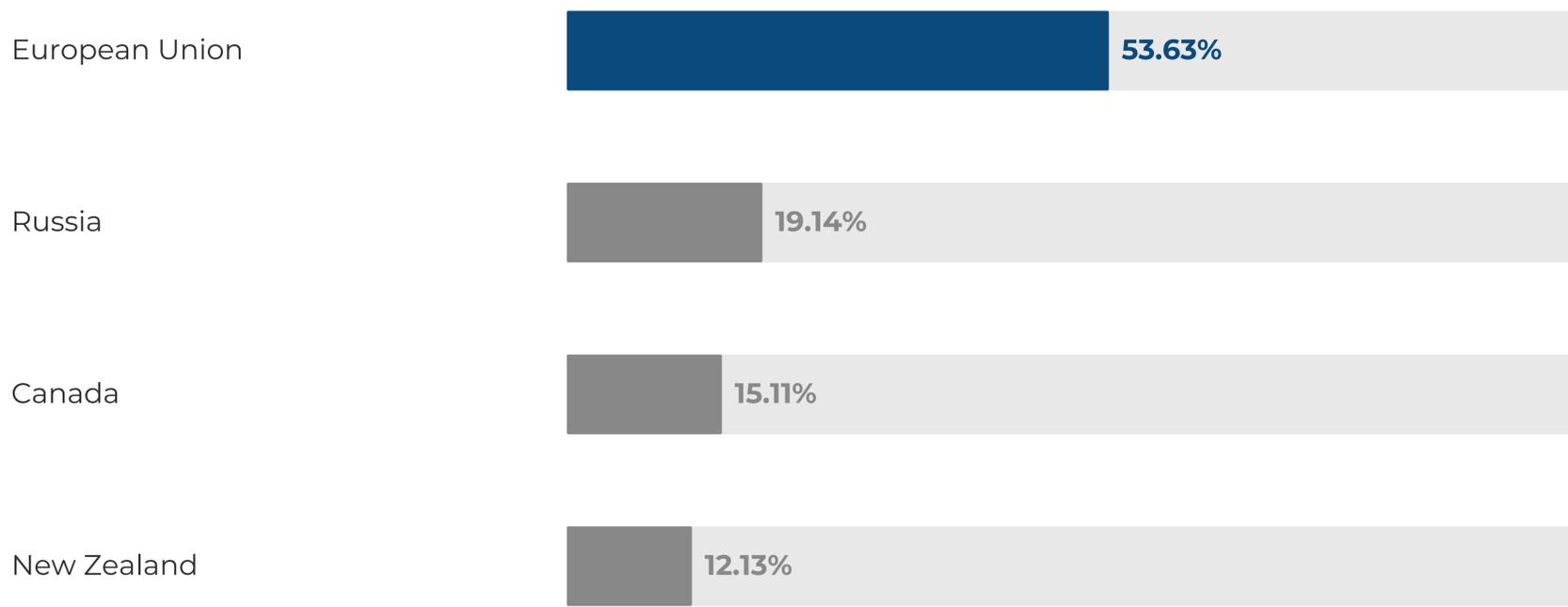
Top eligible choice for 12th Dialogue Partner

UN Agencies led at 35.83% but are ineligible under ASEAN rules

Question 8

Which ASEAN dialogue partner that you think should be the 6th ASEAN Comprehensive Strategic Partner (CSP)?

Question 8 asked respondents to recommend a candidate for the **6th ASEAN Comprehensive Strategic Partner (CSP)**. The **European Union** emerged as the top choice with **53.63%**, followed by **Russia** at **19.14%** and **Canada** at **15.11%**. The wide margin indicates a **clear and firm preference for the EU** as the next CSP.



53.63%

European Union

Chose EU as the next CSP— a clear and firm preference

Russia 19.14% · Canada 15.11% · NZ 12.13%

Question 9

In your opinion, how close is your government to these countries/dialogue partners?

Question 9 asked respondents to evaluate their government’s political, economic, and socio-cultural proximity to each ASEAN Dialogue Partner. The results show that **China, Australia, the Republic of Korea, Japan, the European Union, and the United States** are generally perceived as **“close enough”** on average across all ASEAN member states.

Country	Not Close at All	Not Close	Neutral	Close	Very Close
Australia 	4.72%	6.21%	30.52%	38.07%	20.48%
Canada 	5.67%	14.71%	49.35%	23.81%	6.46%
China 	5.22%	7.06%	15.66%	29.27%	42.79%
European Union 	3.88%	10.34%	35.19%	37.57%	13.02%
India 	5.42%	12.03%	41.3%	31.31%	9.94%
Japan 	3.68%	6.16%	20.92%	37.33%	31.91%
New Zealand 	5.22%	12.23%	46.32%	27.19%	9.05%
Russia 	7.16%	17.69%	36.08%	24.35%	14.71%
South Korea 	4.67%	8.2%	31.81%	38.82%	16.5%
United Kingdom 	4.92%	10.74%	37.67%	31.76%	14.91%
United States 	4.77%	8.1%	26.89%	35.24%	25%



10

SECTION 10

Perception Patterns on Key ASEAN Dialogue Partners Initiatives

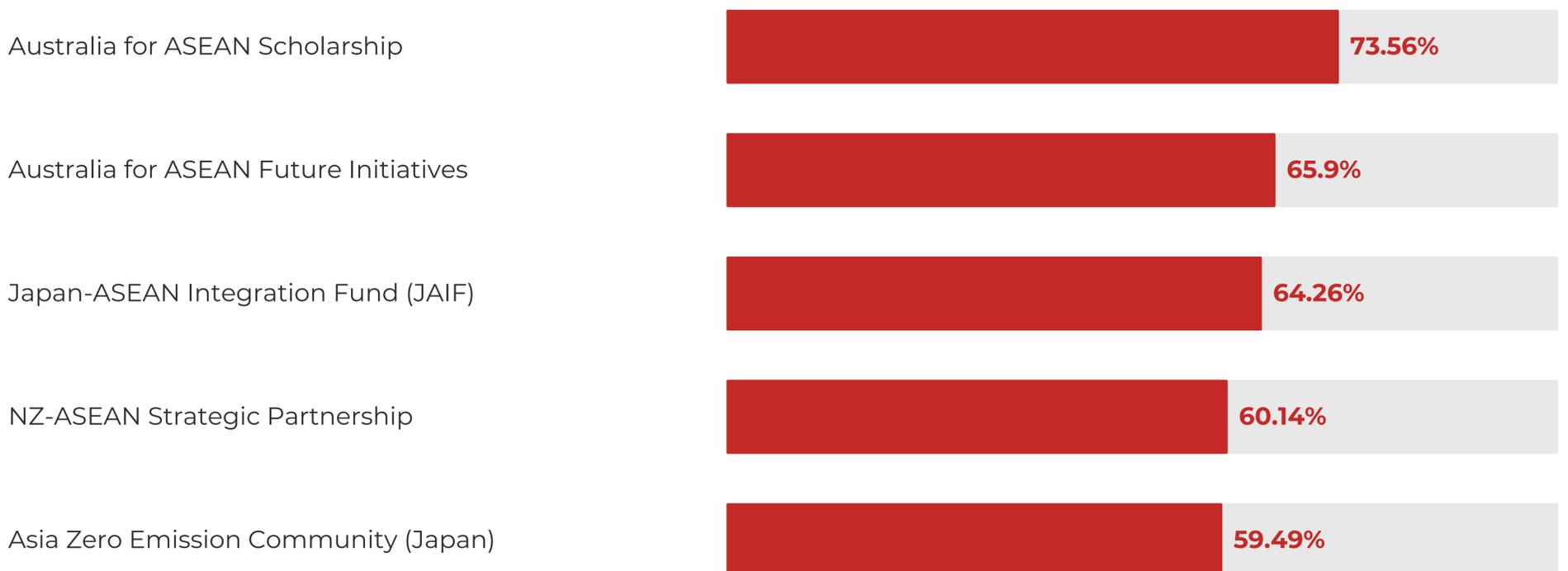
Question 10 asked respondents about key initiatives by the ASEAN Dialogue Partners. The survey found the top 5 most known initiatives by the respondents.

Q10 Do you know these initiatives? (Top 5 — % Yes)



Question 11 asked respondents to evaluate their perception ranging from positive, neutral, and negative towards initiatives by Dialogue Partners. Below are top 5 initiatives with the most positive perceptions.

Q11 Top 5 initiatives with most POSITIVE perception



SECTION 11

Perception Patterns on Strategic Issues

Question 12

From the following issues, which dialogue partners, in your view, positively contribute to addressing the problems/conflicts.

Question 12 asked respondents to evaluate the contributions of ASEAN Dialogue Partners to ongoing conflicts, global challenges, and major international agendas including the wars in Gaza and Ukraine, the Thailand–Cambodia conflict, the South China Sea disputes, climate change, and digital and cyber disruption. In general, the perception patterns toward ASEAN Dialogue Partners show notable nuances, with many responses returning “none” as the most popular answer. However, the results show that the **European Union (EU)** is relatively viewed as **positively contributing** across several of these issues, particularly in **Gaza, Ukraine, climate change, and in safeguarding the rules-based international order**, although the relatively low percentage levels of the top answer (highest at around 20%) show that there is no strong consensus.

	AU	CA	CN	EU	IN	JP	NZ	RU	KR	UK	US	None
War in Gaza	4.77%	1.59%	10.79%	22.61%	3.03%	3.98%	2.19%	6.61%	1.24%	2.34%	19.68%	21.17%
Myanmar crisis	3.98%	2.78%	15.51%	12.03%	5.37%	7.9%	2.34%	3.93%	1.34%	2.63%	11.63%	30.57%
Thai-Cambodia conflict	3.48%	1.89%	14.21%	6.86%	5.86%	6.81%	1.84%	2.73%	2.68%	1.39%	24.95%	27.29%
Cross-Strait relations	4.32%	1.89%	10.29%	12.57%	2.39%	9.54%	2.88%	3.48%	2.93%	3.08%	14.71%	31.91%
War in Ukraine	1.79%	1.29%	4.32%	26.24%	2.58%	3.33%	4.77%	13.87%	2.63%	2.83%	18.79%	17.54%
South China Sea	4.27%	0.99%	17.74%	7.06%	2.34%	8.65%	2.53%	6.31%	3.73%	2.49%	18.79%	25.1%
Climate change	6.11%	3.13%	6.51%	38.67%	2.53%	11.48%	6.41%	2.68%	4.97%	4.17%	6.31%	7.01%
Rules-Based Order	4.62%	2.88%	6.96%	28.08%	2.04%	6.46%	3.28%	4.87%	3.58%	5.57%	13.52%	18.14%
Energy Transition	3.93%	2.58%	16.25%	24.25%	2.78%	17.1%	3.78%	5.47%	4.72%	3.73%	6.81%	8.6%
Trade War	3.08%	1.74%	17.94%	15.46%	2.49%	5.77%	2.34%	3.98%	3.58%	3.73%	20.03%	19.88%
Global trade uncertainties	2.44%	2.04%	16.95%	15.01%	2.83%	7.55%	3.58%	3.93%	3.03%	4.47%	19.14%	19.04%
Digital & Cyber disruption	3.13%	1.74%	13.77%	12.38%	5.02%	10.64%	3.43%	4.62%	9.69%	4.67%	17.05%	13.87%
Food Security	9.54%	2.98%	11.48%	14.86%	6.36%	15.85%	6.41%	4.37%	5.22%	3.08%	7.21%	12.62%
Transnational Crime	7.65%	1.84%	9%	14.51%	2.68%	4.97%	3.23%	6.86%	4.72%	5.47%	23.51%	15.56%
Human Rights	6.36%	4.03%	2.88%	33.4%	1.59%	5.67%	5.52%	3.53%	4.47%	5.17%	13.37%	14.02%

Question 13

From the following issues, which ASEAN member states, in your view, positively contribute to addressing the problems/conflicts.

Question 13 asked respondents to evaluate ASEAN member states (AMS) to ongoing conflicts, global challenges, and major international agendas including the wars in Gaza and Ukraine, the Thailand–Cambodia conflict, the South China Sea disputes, climate change, and digital and cyber disruption. The results show that **Singapore** is relatively viewed as positively contributing across several of these issues, particularly in **Climate Change, safeguarding Rules-Based International Order & Multilateralism, Energy Transition, Global Trade Uncertainties, and Digital & Cyber disruption**. Again, it must be noted that the relatively low percentage levels of the top answer (highest at around 20%) show that there is no strong consensus.

	BN	KH	ID	LA	MY	MM	PH	SG	TH	VN	TL	None
												None
War in Gaza	4.27%	2.49%	32.75%	3.23%	20.87%	1.64%	1.84%	5.57%	1.94%	0.89%	1.19%	23.31%
Myanmar crisis	1.74%	5.12%	19.38%	4.82%	14.86%	10.88%	2.78%	6.16%	11.38%	0.99%	1.64%	20.23%
Thai-Cambodia conflict	1.29%	3.53%	14.12%	5.57%	28.63%	3.53%	2.83%	5.27%	11.23%	3.33%	0.89%	19.78%
Cross-Strait relations	1.34%	1.44%	10.93%	3.58%	11.68%	3.88%	6.36%	19.93%	4.67%	2.14%	1.29%	32.75%
War in Ukraine	1.14%	1.54%	16.2%	2.29%	7.55%	4.03%	5.27%	12.77%	4.47%	2.39%	2.14%	40.21%
South China Sea	1.29%	1.84%	14.86%	2.58%	7.75%	2.78%	17.79%	10.79%	4.52%	8.95%	1.49%	25.35%
Climate change	1.84%	1.74%	11.13%	1.94%	5.52%	1.74%	6.06%	36.48%	8%	4.82%	2.19%	18.54%
Rules-Based Order	1.34%	1.89%	13.07%	1.99%	9.29%	2.04%	5.02%	29.27%	6.01%	5.07%	2.34%	22.66%
Energy Transition	2.09%	1.94%	9.39%	3.83%	7.75%	2.49%	3.33%	34.94%	5.96%	7.85%	3.28%	17.15%
Trade War	1.49%	2.09%	9.69%	2.19%	7.95%	3.28%	3.18%	27.09%	6.46%	8.4%	2.39%	25.8%
Global trade uncertainties	1.19%	1.89%	9.64%	2.93%	7.9%	2.78%	4.82%	28.13%	6.11%	6.01%	1.89%	26.69%
Digital & Cyber disruption	1.34%	2.58%	6.36%	2.09%	6.61%	2.68%	3.83%	42.64%	6.51%	3.93%	1.89%	19.53%
Food Security	1.94%	2.19%	12.52%	2.44%	7.6%	2.49%	3.78%	15.31%	21.37%	10.04%	1.59%	18.74%
Transnational Crime	1.54%	4.67%	9.24%	2.24%	9.15%	3.53%	5.57%	21.22%	11.43%	4.92%	2.04%	24.45%
Human Rights	2.44%	2.04%	13.92%	1.54%	8.15%	3.73%	6.86%	17.2%	8.2%	3.38%	5.77%	26.79%

12

SECTION 12

Focused Insights on Trump's Tariff

Focused Insights on Trump's Tariff is a special thematic section in this year's survey. Given the significance and consequences of President Trump's unilateral tariff announced on **2 April 2025**, the survey included **12 questions** covering respondents' impressions and their preferred responses for ASEAN.

Overall, respondents viewed the tariff as **unfair** and **harmful to every ASEAN Member State's economy**. A majority also believed that it signaled the **end of the World Trade Organization (WTO) and the multilateral trading system** (51.99%).

75.69%

Respondents believed that ASEAN Member States should adopt a **diversification strategy**. When asked which partner ASEAN should move closer to as an alternative, respondents showed a stronger preference for the **European Union (61.48%)** over **China (39.96%)**.

70.33%

Respondents also expressed that ASEAN should adopt a collective position in responding to the tariff.

71.57%

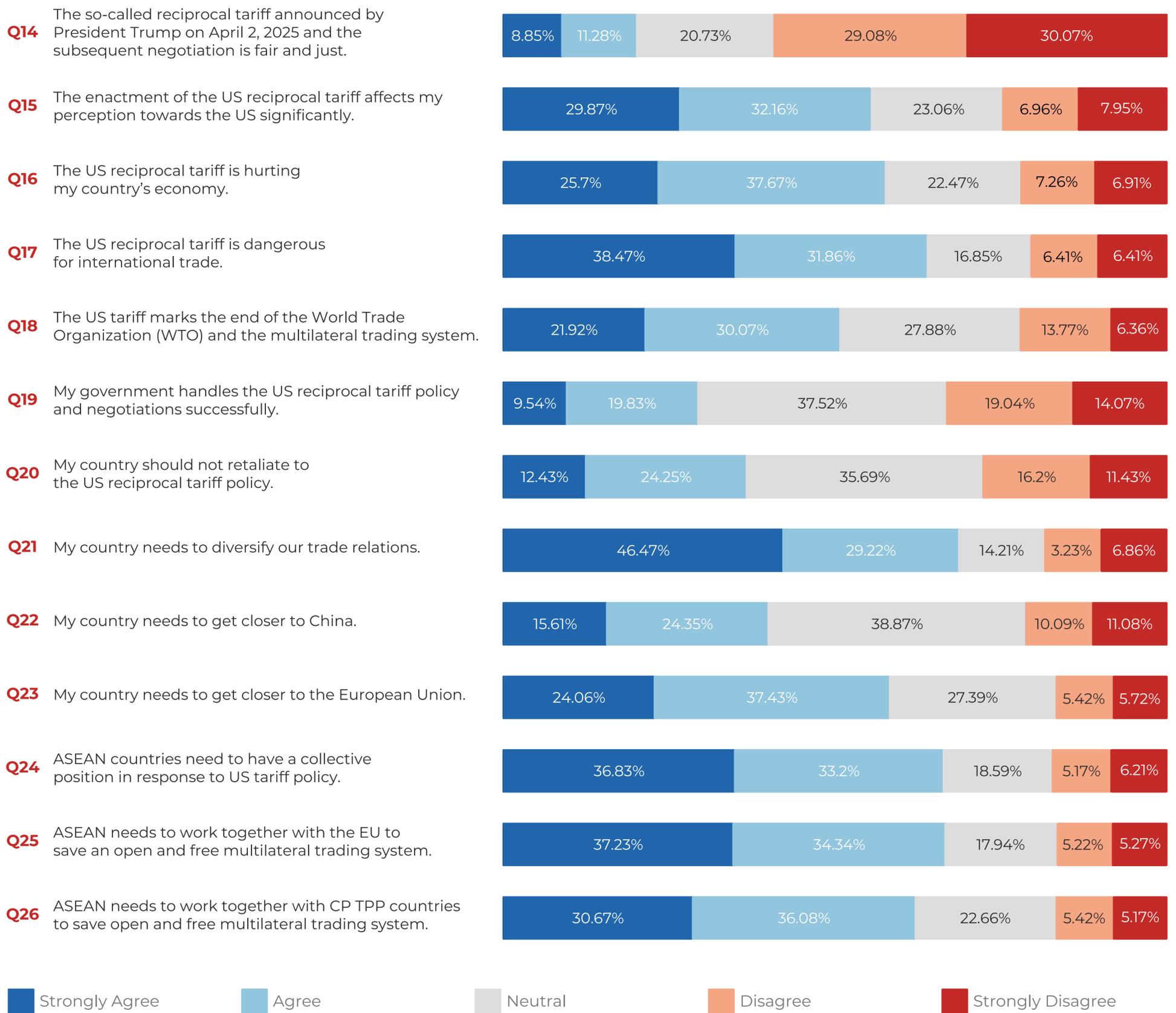
To safeguard an open and free multilateral trading system, respondents recommended working with the EU.

66.75%

Comprehensive and Progressive Agreement for Trans-Pacific Partnership (CPTPP)

Focused Insights on Trump's Tariff

Q14–Q26: Respondent views on the US reciprocal tariff (announced 2 April 2025)



13

SECTION 13

Policy Recommendation

Six Policy Recommendations

In the 2025 ASEAN Summit, ASEAN adopted the ASEAN Community Vision 2045 which envisions ASEAN as a “Resilient, Innovative, Dynamic, and People-Centred ASEAN. The leaders’ choice of adjectives is apt, because amidst the increasingly volatile and fragmented world, we truly need resilience, innovation, and dynamism. Moreover, we firmly believe that the achievement of a resilient, innovative, and dynamic region can only be truly achieved when ASEAN is truly centering the people in the regional cooperation.

This survey is a people-centered initiative to strengthen the “people-centrality” in ASEAN through listening and understanding their perceptions, concerns, and aspirations. Based on this spirit and the findings from the 2025 FPCI Survey on ASEAN Dialogue Partners, we propose these following recommendations:

Develop a long-term collective strategy

1

ASEAN should strengthen the Geopolitical Task Force beyond responding to Great Power policies, integrating more voices from academia, think tanks, and practitioners across fields.

Identify economic vulnerabilities

2

ASEAN should map its economic dependencies and choke points to prepare adequate responses to geopolitical weaponisation, as seen in US reciprocal tariffs and critical mineral restrictions.

Build trust and cooperation with dialogue partners

3

Amid trust deficits in global politics, ASEAN can work with all dialogue partners to redevelop missing trust and push back against the march into the Thucydides Trap.

Reinvigorate multilateralism and regional trade

4

ASEAN and its dialogue partners should strengthen multilateralism through stronger networks of regional trade agreements, connecting RCEP, the EU, and CP-TPP.

Diversify political and economic relations

5

ASEAN and its dialogue partners can help each other diversify relations amid over-dependency risks, through deepened cooperation and wider regional network connections.

Leverage “comparative cooperation advantage”

6

Dialogue partners should optimise their presence by identifying niche strengths while exploring cooperation in pressing global issues such as energy transition and climate change.

ACKNOWLEDGEMENTS

Thank You to Our Supporters & Partners

Foreign Policy Community of Indonesia · fpcisurvey.org