

Assessing U.S. and Chinese Influence in Southeast Asia

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Introduction

Power dynamics in Southeast Asia, including soft power, are fluid. The continued economic impact of the Covid-19 pandemic, China's more insular nationalism, the fallout of Russia's invasion of Ukraine, and widening U.S.-China strategic competition are shuffling U.S. and Chinese comparative advantages across the region.

Local attitudes toward the United States and China—and views of their respective strategic and economic roles in the region—are a vital component in this strategic competition. They constitute the metrics of soft power and influence and need to be considered when predicting where regional governments are likely to align on any given issue. But there are huge gaps in country-by-country opinion polling on these fronts, and there has been little rigorous analysis of the elite and public opinion polls that do exist. Instead, policymakers in Washington and regional capitals alike tend to make assumptions about Southeast Asian opinion using anecdotes or tiny elite samples, often from just a couple of countries.

This white paper collates and weights available country-level polling data to provide a more rigorous assessment of elite and public opinion regarding the United States and China. To find comparable data across a range of polls, the analysis is limited to just three questions for both public and elite opinion:

1. Do the (elites/public) of this country have warmer feelings toward the United States or China?
2. Which of the two do they consider the most important strategic power in the region?
3. Which do they consider the most important economic power in the region?

Each of these assessments is assigned a level of confidence—low, medium, or high—based on sample size, national representativeness, and volatility in the available polling. The table below shows the assessments that can be made with medium or high confidence. In all other cases, there has either

been no polling or assessments can only be made with low confidence—meaning pronouncements that “Country X thinks Y” should be treated with skepticism.

Southeast Asian Public and Elite Opinion toward the United States and China

		Brunei	Cambodia	Indonesia	Laos	Malaysia	Myanmar	Philippines	Singapore	Thailand	Vietnam
Warmer Feelings?	P	?	?	United States	?	China	?	United States	China	United States	United States
	E	Toss-up	?	?	?	Toss-up	?	United States	United States	?	?
Leading Strategic Power?	P	?	?	United States	?	?	?	United States	Toss-up	?	?
	E	China	China	?	China	Toss-up	?	?	United States	?	?
Leading Economic Power?	P	?	?	China	?	?	?	Toss-up	China	?	?
	E	China	China	?	China	China	?	?	China	?	?

Note: P indicates public opinion, E indicates elite opinion.

Source: Author’s analysis.

Each country section below details the available polling, along with a brief overview of the state of U.S. relations and a survey of relevant economic indicators to provide context for some of the polling data. In all cases, China is the leading trading partner (often by a very wide margin) and in many cases the leading investor. The United States is a significant provider of development assistance as defined by the Organization for Economic Cooperation and Development (OECD), but this pales in comparison to the trade and investment figures, as well as nontraditional loans and other forms of assistance. This economic imbalance is reflected in public and elite opinion that China is the leading economic power in the region—a finding shared in every country for which there is sufficient data, except the Philippines.

It is reasonable to assume that in most of the countries for which there is insufficient data, publics and elites would identify China as the region’s leading economic power. But no such assumptions can be made about which nation they would deem the region’s leading strategic power or which they have warmer feelings toward. In the available data, Chinese economic influence is not correlated either positively or negatively with overall public and elite attitudes toward it, nor are public and elite feelings about China and the United States necessarily aligned. Of the three countries for which the data allows confident assessments, public and elite preferences for one power over the other only align in the Philippines.

The CSIS Southeast Asia Program hopes to expand this research in the future with additional polling data and other indicators.

Methodology

PUBLIC OPINION

For public opinion polling, this white paper relies on a range of surveys conducted either by international organizations that cover a broad span of countries or country-specific public opinion survey institutions or think tanks. Both use nationally representative samples and are generally reliable.

The fact that most public opinion polls are country-specific limits their utility for cross-country assessments of attitudes toward the United States and China. The surveys ask different questions

of respondents, many of which are rooted in specific cultural or linguistic contexts. This is why the analysis in this white paper is limited to just three broad questions.

The 2022 **Pew Global Attitudes survey** polled nationally representative samples of 1,003 adults in Malaysia and 1,001 in Singapore. The margin of error was 4 percentage points in Malaysia and 3.7 percentage points in Singapore. The 2019 **Pew Global Attitudes survey** polled a nationally representative sample of 1,035 adults in the Philippines with a margin of error of 4.3 percentage points. Findings from these surveys are treated with high confidence.

The 2017 **Pew Global Attitudes survey** polled a nationally representative sample of 1,000 adults in Vietnam. The margin of error was 5.2 percentage points. Findings from this survey are treated with medium confidence because of their age.

The 2023 **Democracy Perception Index** polled 1,053 online respondents from Indonesia, 1,054 from Malaysia, 1,057 from the Philippines, 1,007 from Singapore, 1,051 from Thailand, and 1,053 from Vietnam. The poll was commissioned by the Alliance of Democracies and conducted by Latana, which describes itself as “an AI-powered brand tracking solution.” The sample sizes in each country were large enough to be statistically rigorous, and results for each were weighted by age, gender, and education level. But as an online-only poll that reaches respondents using third-party news, shopping, sports, and gaming apps and websites, its samples are unlikely to be as representative as those from traditional pollsters. The poll likely overrepresents those who are wealthier, live in urban and suburban areas, and are the most online. In addition, Latana does not make clear whether the polling questions were asked in local languages or only in English, and the exact role of its machine-learning technologies in collecting and analyzing results is unclear. For these reasons, the findings from this survey are treated with medium confidence.

The **Lowy Institute’s 2021 Indonesia Poll** surveyed a nationally representative sample of 3,000 Indonesian adults across every province. The margin of error was 1.8 percentage points. Findings from the survey are treated with high confidence except where a plurality of respondents chose “don’t know,” in which case they are treated with medium confidence.

The **Merdeka Center’s 2022 public opinion survey** on perceptions toward China polled a nationally representative sample of 1,204 adults across all Malaysian states, with a margin of error of 2.9 percent. Findings from this survey are treated with high confidence.

Pulse Asia’s June 2022 survey on public trust in selected countries polled a nationally representative sample of 1,200 Filipino adults across all regions of the country, with a margin of error of 2.8 percent. Findings from this survey are treated with high confidence.

The **December 2022 SWS quarterly survey** polled a nationally representative sample of 1,200 Filipino adults across all regions of the country, with a margin of error of 2.8 percent. Findings from the survey are treated with high confidence.

The **Eurasia Group Foundation’s 2023 survey** polled a nationally representative sample of 500 Singaporean adults and a sample of 500 Filipino adults representative of the online population in the country. Findings from this survey are treated with high confidence for Singapore, and medium confidence for the Philippines.

ELITE OPINION

In contrast to public opinion polling, elite opinion surveys center specifically on policy experts, academics, civil society representatives, business leaders, and in some cases, government officials. For elite opinion, this report relies mainly on the **State of Southeast Asia survey** from the ISEAS-Yusof Ishak Institute in Singapore. ISEAS polls a mixture of academics, business leaders, civil society and media representatives, government officials, and personnel at international organizations. Its surveys are extremely valuable to policymakers and analysts of Southeast Asia, and they provide data points that cannot be found anywhere else. But as with any survey, it has its limitations and does not claim to be equally rigorous for every country in the region. To the contrary, ISEAS presents its results as a reflection of elite opinion in the Association of Southeast Asian Nations (ASEAN) as an institution, rather than that of Southeast Asia as a region or of its constituent countries. It drives home that point by weighting each country's responses not by population or number of respondents, but as 10 percent of the total, reflecting their coequal status within ASEAN.

The 2023 ISEAS survey included 1,308 individuals, down from 1,507 in 2022. The largest number of respondents, 208, came from Singapore, where ISEAS is based. The smallest number, 99, came from the Philippines. In all other cases, the number of respondents was over 100. The size of these response pools relative to each country's population, and therefore the extent to which they are representative of each country's elite, varies widely.

There is no agreed-upon standard for how large a response pool must be for an elite survey to be considered representative. And given the nature of elite surveys, it is impossible to create truly representative samples. But as one point of comparison, the East-West Center's 2022 **Asia Matters for America** survey of U.S. government and business elites included 1,446 respondents, or 1 for every 230,000 Americans. For 2023, the ISEAS survey appears most representative of elite opinion in Brunei, where it surveyed roughly 1 out of every 4,000 residents, and Singapore, where it surveyed roughly 1 in every 30,000. Answers for these two countries are assigned a high confidence score in this white paper. After that, the ratio of respondents to population was about 1:75,000 in Laos, 1:125,000 in Cambodia, and 1:275,000 in Malaysia. These countries' answers are assigned medium confidence scores except in cases of extreme year-over-year volatility, which reduces some to low confidence. Answers for the remainder of countries are assigned low confidence due to the small ratio of respondents to population, which was about 1:500,000 in Myanmar and Thailand, 1:740,000 in Vietnam, 1:1,200,000 in the Philippines, and 1:2,300,000 in Indonesia.

The 2022 **Amador Research Services** poll in the Philippines included 1,249 respondents, mainly from academia and the military or security services, with a much smaller number from civilian government, business, and civil society. It surveyed roughly 1 in every 90,000 residents of the Philippines, for which it is assigned a medium confidence score. By combining this with the ISEAS 2023 and 2022 surveys (the latter having surveyed 1 in every 285,000 residents, warranting a medium confidence score), it is possible to assess with high confidence whether Philippine elites have warmer feelings toward the United States or China.

The CSIS Southeast Asia Program is aware of other elite opinion polling conducted in the region (e.g., the Foreign Policy Council of Indonesia's annual ASEAN-China Survey) but none that ask comparable questions about both China and the United States.

ASSESSING TOSS-UPS

This white paper determines public opinion on each question to be a “toss-up” if the findings are within the margin of error. Since elite polls do not have margins of error, toss-ups are assessed if:

1. the results for the United States and China on a given question are within 5 percentage points;
2. different polling questions touching on the same issue provide contradictory answers; and/or
3. responses to a specific question alternate between the United States and China in consecutive years. Responses that alternate in consecutive years between one power and a toss-up are still assessed to favor that power.

ECONOMIC INDICATORS

For trade statistics, this report relies on the **UN Comtrade Database**. Where discrepancies exist between reported import and export flows between the United States, China, and Southeast Asian countries, this report relies on the figures reported by Southeast Asian countries; this not only allows for a common base from which the authors can assess Washington and Beijing’s trade engagement with a country relative to its overall trade balance, but one rooted in Southeast Asian economies’ perspectives. Meanwhile, for statistics related to foreign capital investment and aid, this report relies on the Lowy Institute’s **Asia Power Index** and **Southeast Asia Aid Map**, respectively.

Brunei

The United States’ ties to Brunei are underdeveloped, but the sultanate is a key partner in regional diplomacy and economic affairs; the 2021 Myanmar coup took place during Brunei’s chairmanship of the ASEAN, whose initial approach to the crisis was shaped by Bruneian interlocutors. In terms of economic affairs, Brunei remains forward-leaning on trade issues: It was a party to the Trans-Pacific Strategic Economic Partnership (P4) agreement that eventually expanded into the Trans-Pacific Partnership (TPP), is now a signatory to both the Comprehensive and Progressive Agreement on Trans-Pacific Partnership (CPTPP) and Regional Comprehensive Economic Partnership (RCEP), and is participating in negotiations on the U.S.-led Indo-Pacific Economic Framework (IPEF).

Public Opinion

There seems to be no rigorous public opinion polling of Bruneian views on the United States and China.

Warmer feelings?	Unknown
Leading strategic power?	Unknown
Leading economic power?	Unknown

Elite Opinion

Elite opinion surveys conducted by the ISEAS-Yusof Ishak Institute in Singapore suggest an ongoing

Warmer feelings?	Toss-up	High confidence
Leading strategic power?	China	High confidence
Leading economic power?	China	High confidence

shift in Bruneian views among government, business, media, and academic experts toward power dynamics in the region. When asked about a hypothetical scenario in which the region was forced to

align with one of the two strategic rivals, a **slim majority of Bruneian respondents in the 2023 survey, 55 percent**, selected China over the United States. This is down from 64.2 percent **in 2022**—but the Bruneian sample size of 53 respondents in the 2022 survey was problematically small and should be treated with caution.

In a crosscutting piece of evidence, Bruneian elites in the ISEAS survey evinced more negative feelings about China than the United States. In 2023, **21.7 percent** of respondents said they had little to no confidence that China would “do the right thing” to contribute to global peace, security, prosperity, and governance, a steep fall from the (again, to be treated skeptically) 67.9 percent who responded this way in 2022. Only **13.3 percent** of respondents in 2023 said they had little to no confidence in the United States to “do the right thing,” compared to the 50.9 percent who responded this way in 2022.

Bruneian elite opinion is much clearer when it comes to which power has more influence in the region. Just 13 percent of respondents in 2023 identified the United States as holding the most **political and strategic influence** in the region, down from 34 percent the previous year. By contrast, 45 percent of respondents identified China as the primary political and strategic power in Southeast Asia, up from 39.6 percent in 2022.

The ISEAS survey respondents were even more lopsided on economic issues. About 44 percent of Bruneian respondents viewed China as the most **influential economic power** in the region, though this is way down from 85 percent in 2022. By contrast, less than 7 percent identified the United States as the most economically influential in 2023, up from the 2 percent who said so in 2022. These sentiments accurately reflect China’s outsized role in Brunei’s economy.

Approximately 120 Bruneian individuals responded to the ISEAS survey in **2023**, compared to just 53 in **2022**.

ECONOMIC INDICATORS

According to the **UN Comtrade Database**, trade in goods between Brunei and the United States amounted to \$230 million in 2021, or just 1 percent of Brunei’s trade volume that year. This was down from \$359 million in 2019 and \$373 million in 2020. Meanwhile, **China’s trade with Brunei** stood at \$2.8 billion in 2021, or approximately 14 percent of the sultanate’s total trade that year. This is a sharp increase from \$1.1 billion in 2019 and \$1.75 billion in 2020.

China is also Brunei’s most important source of foreign direct investment, according to the Lowy Institute’s Asia Power Index, accounting for an astounding **94 percent** of the country’s inbound foreign capital investment between 2012 and 2021. By contrast, the United States accounted for only **1 percent** of all foreign capital investment into Brunei over that period.

Brunei does not currently receive Official Development Assistance (ODA) from the United States, as categorized by the Development Assistance Committee of the OECD. China does not provide ODA in the traditional sense but does offer loans and other assistance that may be interpreted as aid by recipient governments and publics. According to the Lowy Institute’s **Southeast Asia Aid Map**, between 2015 and 2021 China spent and committed \$1.08 million in assistance to Brunei.

Cambodia

Cambodia and the United States have maintained a **strained, often tense relationship** in the decade since Prime Minister Hun Sen cracked down on political opposition, independent media, and organized labor in the country. The deteriorating state of human rights and democracy in Cambodia, exemplified by opposition figure Kem Sokha’s **recent sentencing** to 27 years’ house arrest under spurious charges of treason and the banning of the opposition Candlelight Party ahead of national elections, complicate Washington’s efforts to forge closer ties with Phnom Penh. And while the United States should continue to emphasize human rights concerns in its engagement with Cambodia, it also should constructively engage with Cambodian leadership, not least because of the kingdom’s growing political and economic reliance on China. This reliance—and the perception that Cambodia has irrevocably aligned itself with China—masks the fact that Phnom Penh still sees significant value in enhancing ties with Washington.

Public Opinion

There seems to be no rigorous public opinion polling of Cambodian views on the United States and China.

Warmer feelings?	Unknown
Leading strategic power?	Unknown
Leading economic power?	Unknown

Elite Opinion

The ISEAS-Yusof Ishak Institute’s 2023 State of Southeast Asia survey provides a window into the thinking of at least some Cambodian elites. Surprisingly, **73 percent** of Cambodian respondents selected the United

Warmer feelings?	Toss-up	Low confidence
Leading strategic power?	China	Medium confidence
Leading economic power?	China	Medium confidence

States when forced to choose between one or the other great power. This was one of the highest levels of elite support for the United States among the countries surveyed by ISEAS—and a complete reversal from 2022, when only 18.5 percent of Cambodian respondents chose the United States. Such a huge swing in opinion needs to be taken with an equally large measure of caution. Rather than signaling a radical shift in worldview within Phnom Penh’s elite circles, it seems more likely that respondents are treating the question as a barometer for their feelings about recent events, such as Hun Sen’s 2022 visit to Washington.

Only **18.6 percent** of respondents said they had little to no confidence that China would “do the right thing” to contribute to global peace, security, prosperity, and governance, a slight increase from the 17.2 percent who responded this way in 2022. In contrast, among Cambodian elites in 2023, only **9.7 percent** of respondents said they had little to no confidence in the United States to “do the right thing,” compared to the 28.4 percent who responded this way in 2022.

Other responses to the ISEAS survey were more consistent over time and therefore seem more illuminating. A meager 17.9 percent of elites surveyed in the 2023 survey identified the United States as the **most important political and security power** in the region, compared to 17.3 percent in 2022. This stands in contrast to the 72.4 and 75.3 percent of elites who identified China as the most significant political and security power in 2023 and 2022, respectively.

Unsurprisingly, **75.4 percent** of Cambodian respondents identified China as the predominant economic power in Southeast Asia. This was the largest share of any country in the region and reflects Cambodia’s

growing economic dependence on China. This figure represents a slight dip from 84 percent in 2022 but still far surpasses the percentage of respondents who believe the United States is the predominant economic power in the region (2.2 percent and 4.9 percent in 2023 and 2022, respectively).

Approximately 133 Cambodian individuals responded to the ISEAS survey in **2023**, compared to roughly 80 in **2022**.

ECONOMIC INDICATORS

The primary U.S. economic weakness in Cambodia is investment—not trade, where it remains competitive. Trade in goods between Cambodia and the United States amounted to **\$7.8 billion** in 2021, or 17 percent of Cambodia’s trade volume that year. This is a substantial increase from \$4.7 billion in 2019 and \$5.6 billion in 2020. China’s trade with Cambodia stood at **\$11.2 billion** in 2021, or approximately 24 percent of the kingdom’s total trade. This is up from \$8.6 billion in 2019 and \$8.2 billion in 2020. But the directionality of Cambodia-U.S. and Cambodia-China trade is reversed. An overwhelming majority of Cambodia-U.S. trade—\$7.5 billion out of \$7.8 billion in 2021—consists of Cambodian exports to the United States. By contrast, Cambodia exported just \$1.5 billion in goods to China in 2021 while importing \$9.7 billion.

Between 2012 and 2021, U.S. foreign capital investment into Cambodia amounted to just **5 percent** of the country’s inbound foreign investment. China accounted for **24 percent**.

The United States **spent \$912 million** and committed \$1.04 billion in assistance to Cambodia between 2015 and 2021. In the same period, China **spent \$4.27 billion** and committed approximately \$6.25 billion in assistance to Cambodia.

Indonesia

Guided by its longstanding “free and active” foreign policy and history of nonalignment, Indonesia has sought to maintain balance in its relations with Washington and Beijing. While the presidency of Joko “Jokowi” Widodo has seen significant developments in Sino-Indonesian cooperation, primarily due to congruity between the president’s development and infrastructure agenda and Beijing’s Belt and Road Initiative, Indonesia has also boosted security ties with the United States and its allies. This includes Indonesia’s participation in the Garuda Shield exercises, which expanded last year to the **Super Garuda Shield**, now “one of the biggest joint, multinational exercises in the Indo-Pacific region.” Yet while the Indonesian public is more inclined toward the United States than China, Indonesian strategic elites appear more divided.

Public Opinion

The **Lowy Institute’s Indonesia Poll 2021**, a nationally representative survey of Indonesian public opinion, demonstrates a modest preference for the United States among the public. Only 42 percent

Warmer feelings?	United States	High confidence
Leading strategic power?	United States	Medium confidence
Leading economic power?	China	Medium confidence

of respondents trusted China to act responsibly in the world, a decline of 18 points since 2011, while approximately 56 percent signaled that they trust the United States, a decline of 16 points over the past

decade. However, the surveys were taken 12 years apart, so there have probably been a lot of ups and downs not captured in those numbers.

China has risen to the top of the Indonesian public’s threat perception, with 49 percent of respondents believing that China poses a threat to Indonesia over the next 10 years. And when asked to rank perceptions toward countries on a “feelings thermometer” scale ranging from 0 degrees (coldest feelings) to 100 degrees (warmest feelings), Indonesian respondents ranked the United States at 60 degrees and China at 53 degrees.

When asked which country will be the leading military power in Asia in 20 years, 36 percent of Indonesians identified the United States, down from 58 percent in 2011. Just 22 percent expected China to be the region’s leading military power, largely unchanged from 25 percent in 2011. Those who lost confidence regarding the United States moved to the “don’t know/refused” category, which accounted for 36 percent of responses, up from 11 percent in 2011.

A quarter of Indonesian respondents in 2021 expected the United States to be the leading economic power in Asia in 20 years, basically the same as the 23 percent who answered this way in 2011. Slightly more, 31 percent in 2021, expected China to be the leading economic power in 20 years, which is significantly less than the 52 percent in 2011. As with the question about military power, the number of Indonesians saying they don’t know which country will be the leading economic power leapt, reaching 36 percent in 2021.

When it comes to military and economic power, the Indonesian public seems to give a slight edge to the United States and China, respectively. But a plurality in both cases is unsure. This suggests that the balance of public opinion on either question could change; in fact, it may have already in the year and a half since Lowy conducted its last poll.

The only other recent poll of Indonesian public opinion on China and the United States appears to be the 2023 **Democracy Perceptions Index**, conducted by Latana on behalf of the Alliance of Democracies. This online-only, artificial intelligence-driven poll is not as rigorous or representative as Lowy’s but provides useful data points. Respondents were evenly split, with 27 percent holding a positive view of the United States and 24 percent a negative view, for a net approval of +3 percentage points. In comparison, 27 percent held a positive view of China and 22 percent a negative view, for a net approval of +5 percentage points. This difference is within the margin of error, and nearly half of respondents held a neutral view or had no opinion about each power, making it a toss-up.

Elite Opinion

The opinions of the Indonesian elites surveyed by the ISEAS-Yusof Ishak Institute are ambiguous and sometimes contradictory. They provide useful data points, but the sample sizes involved are not

Warmer feelings?	Toss-up	Low confidence
Leading strategic power?	Toss-up	Low confidence
Leading economic power?	China	Low confidence

sufficient to assess Indonesian elite opinion with confidence. The 2023 State of Southeast Asia survey found that if **forced to choose between major powers**, only 46 percent of Indonesian respondents

would side with the United States, down from 56 percent the previous year.

But the same Indonesian elites evinced stronger negative feelings toward China than the United States. Approximately **57.8 percent** of respondents said they had little to no confidence that China would “do the right thing” to contribute to global peace, security, prosperity, and governance, a slight rise from the 51.1 percent who responded this way in 2022. Meanwhile, **50.4 percent** of respondents said they had little to no confidence in the United States to “do the right thing,” a difficult-to-explain swing from the 29.8 percent who responded this way in 2022.

In 2023, 35.5 percent of surveyed elites identified the United States as the most important **political and security power** in the region, effectively unchanged from 35.1 percent in 2022. Meanwhile, 29.8 percent of elites surveyed in 2023 identified China as the region’s primary political and security power, a fall from the 38.2 percent who responded this way in 2022. The narrow margins and year-over-year reversal of fortunes suggest these should be treated as a toss-up.

Roughly 71.1 percent of Indonesian strategic elites surveyed by ISEAS in 2023 identified China as the **most influential economic power** in Southeast Asia (up from 67.9 percent in 2022), with only 5 percent selecting the United States (down from 8.4 percent in 2022). This is an accurate reflection of their respective levels of economic engagement in Indonesia.

Approximately 120 Indonesian individuals responded to the ISEAS survey in **2023**, compared to roughly 130 in **2022**.

ECONOMIC INDICATORS

Trade in goods between Indonesia and the United States amounted to **\$37.1 billion** in 2021, or 9 percent of Indonesia’s trade volume that year. This reflects a boost in trade flows between the United States and Indonesia, up from \$27.2 billion in 2019 and \$27.3 billion in 2020. But China’s trade with Indonesia, at **\$110 billion** in 2021, was triple that of the United States and accounted for approximately 26 percent of Indonesia’s total trade. China-Indonesia trade rose sharply since the early days of the Covid-19 pandemic, up from \$72.9 billion in 2019 and \$71.4 billion in 2020.

The United States also lags far behind China on the investment front. Between 2012 and 2021, the United States provided foreign direct investment amounting to **8 percent** of all of Indonesia’s inbound foreign investment. China more than doubled that, accounting for approximately **20 percent** of inbound investment in that time.

The United States **spent \$1.89 billion** and committed \$1.42 billion in assistance to Indonesia between 2015 and 2021. In the same period, China **spent \$15.1 billion** and committed a whopping \$18.2 billion in assistance to Indonesia.

Laos

U.S.-Laos relations are underdeveloped, although Vientiane is an active player in both ASEAN and the latticework of Mekong-related subregional arrangements, including the Mekong-U.S. Partnership. Its proximity and economic exposure to China has led to assumptions that Laos is closely aligned with Beijing. This perception is heightened by **Laos’s debt crisis**, which is driven mainly by loans from China and gives Beijing enormous leverage over Vientiane.

Public Opinion

There seems to be no rigorous public opinion polling of Lao views on the United States and China.

Elite Opinion

Warmer feelings?	Unknown
Leading strategic power?	Unknown
Leading economic power?	Unknown

The ISEAS 2023 State of Southeast Asia survey found that 59 percent of Lao respondents would favor the United States if **forced to choose** between the two major powers. This is a significant reversal from 2022, when only 18 percent responded this way. The scale of this shift warrants skepticism, especially

Warmer feelings?	Toss-up	Low confidence
Leading strategic power?	China	Medium confidence
Leading economic power?	China	Medium confidence

because the size of the Lao response pool in 2022 was problematically small and more than doubled between the two surveys. It might indicate the directionality of a shift in Lao elite feelings about China or the United States but should not be taken at face value.

When it came to negative perceptions, **16.8 percent** of respondents said they had little to no confidence that China would “do the right thing” to contribute to global peace, security, prosperity, and governance, a significant drop from the 40.9 percent who responded this way in 2022. Only **5.6 percent** of Lao respondents in 2023 said they had little to no confidence in the United States to “do the right thing,” compared to 50 percent who responded this way in 2022.

Just 13.1 percent of elites surveyed in 2023 identified the United States as the most important **political and security power in the region**, a slight increase from 9.1 in 2022. This stands in contrast to the 30.8 percent of respondents who believed that China is the most important political and security power, a steep decline from the 75 percent who responded this way in 2022. This nearly 45-point swing warrants caution, but the gap between the responses for China and the United States remains large enough to say with some confidence that Lao elites view China as the predominant strategic power in the region.

Only **20.6 percent** of Lao respondents identified China as the predominant economic power in the region, an immense drop from 86 percent in 2022. The enormity of this change is highly suspicious, especially given China’s continued economic dominance in Laos. Rather than an honest assessment of China’s economic power, respondents may have been signaling their growing unease with the degree of Vientiane’s dependency on Beijing amid the debt crisis. In terms of Lao views of U.S. economic influence, only 5.6 percent of respondents believed that the United States is the region’s predominant economic power, up slightly from 4.5 percent in 2022.

Approximately 107 Lao individuals responded to the ISEAS survey in **2023**, compared to roughly 43 in **2022**.

ECONOMIC INDICATORS

Trade in goods between Laos and the United States amounted to only **\$334 million in 2021**, or 3

percent of Laos’s trade volume that year. This is a significant improvement from \$108 million in 2019 and \$155 million in 2020. But it is less than a tenth of **China’s trade with Laos**, which stood at \$3.6 billion, or 27 percent of Laos’s total trade, in 2021. Trade volume between China and Laos that year narrowly exceeded its 2019 total of \$3.4 billion after having fallen to \$2.8 billion in 2020.

China is nearly as dominant on the investment front. It accounted for **25 percent** of Laos’s inbound foreign capital investment between 2012 and 2021. The United States provided only **6 percent**.

The United States **spent \$366 million** and committed \$427 million in assistance to Laos between 2015 and 2021. In the same period, China **spent \$6.48 billion** and committed \$8.08 billion in assistance to Laos.

Malaysia

U.S.-Malaysia cooperation remains robust, but domestic political instability and successive changes in government have impaired Washington’s ability to forge deeper ties with Putrajaya. Defense cooperation has become routinized, including through the Keris Strike and Bersama Warrior exercises, and economic cooperation remains a key area of opportunity, including through Malaysia’s participation in IPEF.

Public Opinion

Although views toward China have declined worldwide, **nationally representative surveys conducted by Pew** demonstrate that the Malaysian public generally favors China over the United

Warmer feelings?	China	High confidence
Leading strategic power?	Unknown	N/A
Leading economic power?	Unknown	N/A

States. Approximately 60 percent of Malaysian respondents in 2022 held favorable views toward China, compared to 44 percent who held favorable views toward the United States. And 62 percent of Malaysian respondents trusted Xi Jinping to “do the right thing regarding world affairs,” compared to 53 percent for Joe Biden.

Meanwhile, the Merdeka Center’s **2022 survey** of Malaysian public opinion toward China found that approximately 39 percent of respondents viewed China favorably, compared to 45 percent with a neutral impression of China, and just 12 percent with a negative impression. Moreover, approximately 70 percent of respondents perceived the current relationship between China and Malaysia to be “good,” a slight increase from the 67 percent who responded this way in 2016. The Merdeka Center has not conducted recent public opinion polling of Malaysian attitudes toward the United States, but these results provide greater confidence in Pew’s findings.

In the 2023 **Democracy Perception Index**, Malaysians were more evenly split. This poll found that 37 percent of Malaysian respondents held a positive view of the United States and 25 percent held a negative view, for a net approval of +11 percentage points. By comparison, 39 percent held a positive view of China and 26 percent a negative view, for a net approval of +14 percentage points. The difference is within the poll’s margin of error, making it a toss-up.

Elite Opinion

When forced to choose between the United States and China in the 2023 State of Southeast Asia survey,

Warmer feelings?	Toss-up	Medium confidence
Leading strategic power?	Toss-up	Medium confidence
Leading economic power?	China	Medium confidence

54.8 percent of Malaysian strategic elites selected China and 45.2 percent selected the United States. This is an inversion of 2022, when 43 percent selected China and 57 percent selected the United States.

The United States does moderately better when it comes to negative perceptions. Approximately **48.4 percent** of respondents said they had little to no confidence that China would “do the right thing” to contribute to global peace, security, prosperity, and governance, a slight decrease from the 51.1 percent who responded this way in 2022. In contrast, **38.7 percent** of respondents said they had little to no confidence in the United States to “do the right thing,” compared to 34.1 percent who responded this way in 2022.

A slim plurality of Malaysian respondents in 2023, **35.5 percent**, believed that China is the predominant political and strategic power in the region, while 33.9 percent believed the same for the United States. This represents a decline for China from 51.1 percent in 2022 and an increase for the United States from 24.4 percent.

Meanwhile, **65.3 percent** of Malaysian respondents believed China is the predominant economic power in the region, down from 72.6 percent in 2022. In contrast, just 13.7 percent of respondents believed the United States is the primary economic power in Southeast Asia, up slightly from 11.9 percent in 2022.

Approximately 124 Malaysian individuals responded to the ISEAS survey in **2023**, compared to roughly 135 Malaysian respondents in **2022**.

ECONOMIC INDICATORS

China nearly doubles the United States in both trade and investment flows in Malaysia. Trade in goods between Malaysia and the United States amounted to **\$52.4 billion** in 2021, or 10 percent of Malaysia’s total trade volume that year. This reflects a general upward trend in recent years, with trade up from \$39.9 billion in 2019 and \$42.6 billion in 2020. **China’s trade with Malaysia** stood at \$101.6 billion in 2021, or approximately 19 percent of Malaysia’s total trade that year. That is a substantial increase from \$76.4 billion in 2019 and \$78.8 billion in 2020.

In terms of foreign direct investment, the United States accounted for approximately **15 percent** of Malaysia’s inbound foreign investment between 2012 and 2021, while China accounted for **29 percent**.

The United States **spent \$57.7 million** and committed \$79.1 million in assistance to Malaysia between 2015 and 2021. In the same period, China **spent \$4.96 billion** and committed \$17.1 billion in assistance to Malaysia.

Myanmar

U.S. ties with the military junta in Myanmar have been all but nonexistent since the February 2021 coup. The United States has frequent informal engagements with the opposition National Unity Government (NUG) but limited contact with the various ethnic armed organizations and Peoples’ Defense Forces that make up the bulk of the country’s resistance forces. The junta has turned

toward China—along with India, Russia, and a few others—in the face of isolation by the wider international community. China also maintains informal contacts with the NUG and some ethnic armed organizations, though probably with limited ability to reverse widespread anti-China narratives among the opposition. These shifts mean that the generals in Naypyidaw have shifted decisively toward Beijing, while most of the opposition likely prefers the United States. But given the civil war, these assumptions are impossible to test rigorously.

Public Opinion

There does not appear to be any rigorous public opinion polling of Myanmar views on the United States

Warmer feelings?	Unknown
Leading strategic power?	Unknown
Leading economic power?	Unknown

and China either before or since the coup.

Elite Opinion

Most elites polled by ISEAS in 2022 and 2023 were likely to have been either part of the civilian

Warmer feelings?	United States	Low confidence
Leading strategic power?	Toss-up	Low confidence
Leading economic power?	China	Low confidence

government ousted in 2021 or affiliated with media, academia, business, and nongovernmental organizations sympathetic to the opposition. They provide useful data points, but the sample sizes involved are not sufficient to assess Myanmar elite opinion with confidence.

When **forced to choose** between the United States and China in the 2023 State of Southeast Asia survey, 67.8 percent of Myanmar respondents selected the United States, a fall from 92 percent in 2022. On this and all other Myanmar responses to the ISEAS survey, the opinions of broadly defined “elites” are likely very different from those of the narrower band of military, government, and business elites running the current junta.

When asked about their confidence in China’s ability to “do the right thing” to contribute to global peace, security, prosperity, and governance, about **80 percent** of these respondents said they had little to no confidence, a slight decline from the 88.8 percent who responded this way in 2022. In contrast, approximately **30.5 percent** of respondents stated that they had little to no confidence in the United States to “do the right thing,” compared to the 11.5 percent who responded this way in 2022.

Meanwhile, in terms of political and strategic significance, approximately 49.6 percent of Myanmar respondents believed the United States is the predominant political and strategic power in the region, up from 19.7 percent in 2022. This compares to 40 percent who believed China is the primary power, a precipitous drop from 70.9 percent in 2022. These huge swings seem to reflect a significant shift in the kinds of elites ISEAS surveyed. The Myanmar sample size in 2023 was less than a third of 2022’s, and it had a much larger proportion of businesspeople—29 percent compared to just 3 percent—and a much smaller proportion of self-identified government officials—26 percent compared to 45 percent.

Unsurprisingly, given the scale of China’s economic engagement in Myanmar, **72 percent** of respondents to the 2023 ISEAS survey identified China as the predominant economic power in the region, compared to only 14 percent for the United States. By contrast, in the 2022 ISEAS report, 83.4 percent of respondents selected China as the region’s primary economic power, with only 6 percent selecting the United States.

Approximately 115 Myanmar individuals responded to the ISEAS survey in **2023**, compared to roughly 350 Myanmar respondents in **2022**.

ECONOMIC INDICATORS

Trade in goods between Myanmar and the United States amounted to **\$799 million** in 2021, or less than 3 percent of Myanmar’s trade volume that year. This figure is reflective of the overall collapse of U.S. engagement and the country’s economic tailspin since the coup. But trade flows were not that much larger before the coup—\$1.2 billion in 2019 and \$1.3 billion in 2020. **China’s trade with Myanmar**, by contrast, stood at \$8.7 billion in 2021, or 29 percent of Myanmar’s total trade that year. This is a marked decline from \$12.2 billion in 2019 and \$11.9 billion in 2020 but shows that the junta remains reliant on China amid international isolation.

As with trade, China was a much larger investor in Myanmar before the coup and remains one today. Over the past 10 years, the United States has accounted for less than 4 percent of foreign direct investment into Myanmar, while China has accounted for more than **15 percent**.

The United States **spent \$1.18 billion** and committed \$1.41 billion in assistance to Myanmar between 2015 and 2021. In the same period, China **spent \$2.23 billion** and committed \$10.9 billion in assistance to Myanmar.

Philippines

Out of all the United States’ Southeast Asian partners, the Philippines has received the most time and attention from Washington under the Biden administration. Political and security cooperation with the United States has grown during the first year of the Ferdinand “Bongbong” Marcos Jr. government, resulting in the recent expansion of the 2014 Enhanced Defense Cooperation Agreement, as well as more serious thinking in Manila on how to better network with the broader web of U.S. alliances in the region. Major shifts in U.S.-Philippines relations reflect not only longstanding support for the alliance among strategic elites and the public, but also growing anxieties about China and its aggressive behavior in the South China Sea.

Public Opinion

Warmer Feelings	United States	High confidence
Leading strategic power?	United States	Medium confidence
Leading economic power?	Toss-up	Medium confidence

Public opinion polling conducted by **PulseAsia** in June 2022 found that 89 percent of respondents evinced either a “great deal” or a “fair amount” of trust in the United States. This represents an upward shift of 5 percentage points from the last time Pulse Asia conducted this survey in September 2019. By contrast, only 33 percent of respondents expressed trust in China, a slight increase from 25 percent in 2019.

These results are largely consistent with public opinion polling conducted in December 2022 by Social Weather Stations (SWS). The SWS survey found that the **Filipino public broadly trusts the United States**, which holds a net trust score of +74 percentage points, calculated by subtracting the percentage of respondents selecting “little trust” from the percentage selecting “much trust.” These results mirror SWS’s past findings, with the United States not having dipped below +55 net percentage points since the start of the Benigno Aquino III administration in 2010. By contrast, China’s net trust score was -6 percentage points, a slight rise from recent years but still significantly lower than that of other regional partners.

These results in turn echo surveys conducted by Pew on Filipino attitudes toward the United States and China. **Pew’s 2019 Global Attitudes Survey**, the last to ask Filipinos about their opinions and which surveyed 1,035 Filipinos from May-June 2019, found that 80 percent of Filipino respondents held a favorable opinion of the United States, compared to the 42 percent who held a favorable opinion of China.

The 2023 **Democracy Perception Index** found a similar preference for the United States among Filipino respondents. In that poll, 67 percent of Filipinos held a positive view of the United States and just 5 percent negative, for a net approval of +61 percentage points. In contrast, 31 percent each held positive and negative views of China, for a net approval of 0 percentage points.

Lastly, the Eurasia Group Foundation’s 2023 ***Caught in the Middle: Views of US-China Competition Across Asia*** report found that, across a survey of 500 Filipino respondents representative of the online population in the Philippines, approximately 81.6 percent of respondents held a positive view of the United States, compared to the 18.4 percent who held a negative view. This stands in stark contrast to the 30.2 percent of Filipino respondents who held a positive view of China and the 69.8 percent of respondents who held a negative view. Approximately 64 percent of respondents who held negative views of China attribute this sentiment to Beijing’s military destabilization of the region. When asked to consider the impact of U.S.-Philippine military cooperation, 85 percent of respondents believed that such cooperation has had a positive impact, compared to 33.5 percent of respondents who believed that China-Philippines military cooperation has had a positive impact. In terms of diplomatic influence—interpreted here as being akin to strategic influence—49 percent of Filipino respondents believe that the United States holds the most influence, compared to 22 percent of respondents who selected China. While a plurality of Filipino respondents selected ASEAN as the region’s predominant economic power, approximately 24 percent of respondents selected the United States, while roughly 20 percent selected China, assessed here as a “toss-up.” The report also found that, when aggregating the mean score of four soft power variables to form an overall soft power measurement, the United States scored 10.3 out of a 1-16-point scale in the eyes of Filipino respondents, compared to 6.4 for China.

Elite Opinion

Warmer feelings?	United States	High confidence
Leading strategic power?	United States	Low confidence
Leading economic power?	China	Low confidence

Elite polling by ISEAS in the Philippines provides useful data points, but the sample size involved in 2023 is not sufficient to assess Filipino elite opinion with confidence. Comparing its findings to other elite surveys with larger sample sizes, however, allows a confident assessment of the topline question of whether Filipino elites have warmer feelings toward the United States or China. When forced to choose

between the two in the 2023 State of Southeast Asia survey, 78.8 percent of Filipino respondents selected the United States, a slight fall from 83.5 percent in 2022.

When asked about their confidence in China's ability to "do the right thing" to contribute to global peace, security, prosperity, and governance, approximately **62.7 percent** of respondents said they had little to no confidence, a drop from the 82 percent who responded this way in 2022. Meanwhile, among Filipino elites in 2023, only **20.2 percent** of respondents said they had little to no confidence in the United States to "do the right thing," roughly on par with the 22 percent who responded this way in 2022.

A survey of approximately 1,200 Filipino strategic elites—including policy experts, uniformed personnel, and academics—conducted by **Amador Research Services** in November and December 2022 provides greater confidence to the finding that Filipino elites prefer the United States to China. Asked with which countries the Philippines should strengthen partnerships, 69 percent of respondents said the United States, compared to just 39 percent for China. This survey represents a much larger number of elites but is more heavily weighted toward academia (44 percent of respondents) and the military (38 percent).

A plurality of Filipino respondents to the 2023 State of Southeast Asia survey, **44.4 percent**, identified the United States as the primary political and strategic power in the region, down slightly from 51 percent in 2022. Meanwhile, about 30.3 percent of respondents believed China is the predominant strategic power in the region, down from 37 percent in 2022.

By contrast, a plurality of **36.4 percent** of Filipino respondents identified China as the predominant economic power in the region, a significant drop from the 65.8 percent who answered this way in 2022. The size of this swing should be treated with a high degree of skepticism, especially because the number of Filipino respondents to the ISEAS survey plummeted by more than 75 percent in 2023.

Approximately 99 Filipino individuals responded to the ISEAS survey in **2023**, compared to roughly 400 Filipino respondents in **2022**.

ECONOMIC INDICATORS

Trade in goods between the Philippines and the United States amounted to **\$20.1 billion** in 2021, or 10 percent of the Philippines' trade volume. This represents a return to pre-Covid-19 levels, which stood at \$20.1 billion in 2019 before dipping to \$17.4 billion in 2020. But China's trade with the Philippines is nearly double that of the United States. It reached **\$39.7 billion**, or about 20 percent of the Philippines' total trade, in 2021. This surpasses the \$36.6 billion in bilateral trade in 2019, after which there was a sharp drop to \$31.8 billion in 2020.

The United States is more competitive with China on foreign direct investment in the Philippines than in most of the rest of the region, though it still lags. The United States provided 15 percent of the Philippines' inbound foreign direct investment over the past 10 years, compared to **22 percent** provided by China.

The United States **spent \$1.40 billion** and committed \$1.27 billion in assistance to the Philippines between 2015 and 2021. In the same period, China **spent only \$262 million** in assistance to the Philippines, a figure that pales against the \$6.28 billion it committed.

Singapore

While not a formal treaty ally, Singapore is of critical importance to U.S. interests in the region. The city-state's longstanding defense partnership with Washington is vital to U.S. forward presence, providing access, basing, and overflight privileges. Singapore has also played a leading role in shaping the region's economic architecture, exemplified by its participation in the CPTPP and IPEF, in addition to its efforts to forge a web of digital economy agreements with partners worldwide.

Public Opinion

Warmer feelings?	China	High confidence
Leading strategic power?	Toss-up	Medium confidence
Leading economic power?	China	High confidence

While views toward China have slumped in much of the world, **nationally representative surveys conducted by Pew** demonstrate that the Singaporean public favors China over the United States. Approximately 67 percent of Singaporean respondents in 2022 held favorable views toward China, compared to 51 percent who held favorable views toward the United States. These findings are largely consistent with Pew's data from 2021, in which approximately 64 percent of respondents held favorable views toward China and 51 percent held favorable views toward the United States.

The **2022 Pew Global Attitudes Survey** also asked Singaporean respondents with which country it is most important for the city-state to have close economic relations. Respondents chose China more often than the United States (49 and 33 percent, respectively). Given the context, it is reasonable to treat this as analogous to asking which country Singaporeans see as the leading economic power now and in the foreseeable future.

In the 2023 **Democracy Perception Index**, Singaporean respondents were more evenly split, but still favored China slightly. This survey found that 44 percent of Singaporeans held a positive view of the United States and 24 percent a negative view, for a net approval of +20 percentage points. A slightly higher 49 percent held a positive view of China and 20 percent held a negative one, for a net approval of +29 percentage points.

Lastly, the Eurasia Group Foundation's 2023 ***Caught in the Middle: Views of US-China Competition Across Asia*** report found that, across a nationally representative survey of 500 Singaporean respondents, approximately 47.8 percent of respondents held a positive view of the United States, compared to 52.2 percent who held a negative view. This falls short of the 55.7 percent of Singaporean respondents who held a positive view of China and the 44.3 percent of respondents who held a negative view. When asked to consider the impact of U.S.-Singapore military cooperation, 81.7 percent of respondents believed that such cooperation has had a positive impact, compared to 71.9 percent of respondents who believed that China-Singapore military cooperation has had a positive impact. In terms of diplomatic influence—interpreted here as being akin to strategic influence—42 percent of Singaporean respondents believe that the United States holds the most influence, compared to 38 percent of respondents who selected China. Moreover, some 52 percent of Singaporean respondents also hold the view that China is the most influential economic power in Asia. The report also found that, when aggregating the mean score of four soft power variables to form an overall soft power

measurement, the United States scored 7.7 out of a 1-16-point scale in the eyes of Singaporean respondents, compared to 7.9 for China.

Elite Opinion

Warmer feelings?	United States	High confidence
Leading strategic power?	United States	High confidence
Leading economic power?	China	High confidence

Singaporean elite opinion as reflected by the 2023 State of Southeast Asia survey is markedly different than that of the public. Considering that ISEAS is a Singapore-based institute, its elite network in the city-state is probably its most robust, and the answers for Singapore therefore the most representative of any country in its dataset. About **61 percent** of Singaporean respondents favored the United States if forced to choose between the two major powers, though this is down from **77.9 percent** in 2022.

Moreover, **56.3 percent** said they had little to no confidence that China would “do the right thing” to contribute to global peace, security, prosperity, and governance, compared to the 69.8 percent who responded this way in 2022. In contrast, only **38.5 percent** of respondents in 2023 said they had little to no confidence in the United States to “do the right thing,” compared to 31.1 percent in 2022.

In terms of political and strategic importance, 33.2 percent of Singaporean respondents viewed China as the region’s primary political and strategic power, down from 48.2 percent in 2022. Approximately 48.1 percent of Singaporean respondents selected the United States as the region’s primary political and strategic power, up slightly from 46.8 percent in 2022.

Like their neighbors, most Singaporean elites view China as the primary economic power in Asia, with **70.7 percent** of respondents to the State of Southeast Asia saying as much in 2023, down from 81.1 percent in 2022. This is in stark contrast to the mere 13.5 percent who selected the United States as the primary economic power in Asia, up slightly from 12.2 percent in 2022.

Approximately 208 Singaporean individuals responded to the ISEAS survey in **2023**, compared to roughly 222 Singaporean respondents in **2022**.

ECONOMIC INDICATORS

The United States remains more competitive when it comes to trade with Singapore than it is in most of the region, but the gap is widening. U.S.-Singapore trade amounted to **\$79.8 billion** in 2021, or 9 percent of the city-state’s total trade volume that year. That was largely unchanged from \$78.3 billion in 2019 and \$75.4 billion in 2020. Meanwhile, China’s trade with Singapore stood at **\$122.3 billion** in 2021, or approximately 14 percent of the city-state’s total. That was up substantially from \$100.7 billion in 2019 and \$98.7 billion in 2020.

By contrast, the United States maintains a sizeable advantage when it comes to investment in Singapore, providing 27 percent of the country’s inbound foreign direct investment over the past 10 years. China provided just **11 percent** during this timeframe.

Singapore does not currently receive ODA from the United States as categorized by the OECD, nor does it seem to receive anything that might be considered aid from China.

Thailand

While Thailand is one of the United States' five Indo-Pacific allies, the U.S.-Thailand relationship has stagnated in recent years, partially due to ongoing political instability following Thailand's 2014 coup. Although cooperation at the operational level remains robust, Thailand receives less attention from the Biden administration than non-allies such as Singapore, Indonesia, and Vietnam.

Public Opinion

Warmer feelings?	United States	Medium confidence
Leading strategic power?	Unknown	N/A
Leading economic power?	Unknown	N/A

The only recent public opinion polling of Thai views on the United States and China appears to be the **Democracy Perception Index**, which can only be treated with medium rather than high confidence for reasons explored in the methodology section. The 2023 survey found that 49 percent of Thai respondents held a positive view of the United States and just 9 percent held a negative one, for a net approval of +40 percentage points. By comparison, 49 percent held a positive view of China versus 18 percent negative, for a net approval of +22 percentage points.

Elite Opinion

Warmer feelings?	United States	Low confidence
Leading strategic power?	China	Low confidence
Leading economic power?	China	Low confidence

ISEAS surveys of Thai elites provide useful data points, but the sample sizes involved are not sufficient to assess Thai elite opinion with confidence. A narrow majority of Thai respondents to the 2023 State of Southeast Asia poll, **approximately 57 percent**, picked the United States in a hypothetical scenario in which the region were forced to choose sides between the two powers, which is unchanged from **2022**.

When asked whether China would “do the right thing” to contribute to global peace, security, prosperity, and governance, **56.9 percent** of Thai respondents said they had little to no confidence, up from 47.9 percent in 2022. In contrast, **34.7 percent** of respondents in 2023 had little to no confidence in the United States to “do the right thing,” compared to 26.5 percent in 2022.

In 2023, 45.8 percent of Thai respondents identified China as the region's predominant political and strategic power, down from 55.6 percent in 2022. Meanwhile, only 36.1 percent selected the United States as the region's predominant political and strategic power, though this is up from 27.4 percent in 2022.

Over **74 percent** of Thai respondents to the 2023 State of Southeast Asia poll identified China as the predominant economic power in the region, a slight rise from 69.2 percent in 2022. Meanwhile, only 9 percent of respondents selected the United States as the predominant economic power in the region, a slight fall from 13.7 percent in 2022.

Approximately 114 Thai elites responded to the ISEAS survey in **2023**, compared to roughly 91 Thai respondents in **2022**.

ECONOMIC INDICATORS

Trade in goods between Thailand and the United States amounted to **\$55.8 billion** in 2021, or 10 percent of Thailand’s trade volume that year. This was up from \$45.8 billion in 2019 and \$49.5 billion in 2020. China’s goods trade with Thailand was nearly twice as large, at **\$103 billion** in 2021, or approximately 19 percent of Thailand’s total trade and nearly a quarter of its imports. This was up substantially from \$73.9 billion in 2019 and \$79.6 billion in 2020.

The United States remains the larger investor in Thailand by a narrow margin. It provided over 13 percent of Thailand’s inbound foreign direct investment in the past decade, during which China accounted for approximately **12 percent**.

The United States **spent \$374 million** and committed \$473 million in assistance to Thailand between 2015 and 2021. In the same period, China **spent \$2.27 billion** and committed \$21.6 billion in assistance to Thailand.

Vietnam

Vietnam has been a focal point of U.S. diplomatic engagement during the Biden administration. Its status as a claimant in the South China Sea disputes and the harassment the country regularly faces at the hands of the China Coast Guard and its maritime militia have led Hanoi to take incremental steps to boost security cooperation with the United States. And Vietnam’s emergence as a hub for high-end manufacturing makes it an attractive destination for companies seeking to diversify away from reliance on China, meaning Hanoi will inevitably play a key role in the region’s increasingly complex economic architecture, including the Biden administration’s IPEF. While Vietnam maintains strong ties with China, particularly at the party level, historic animosity and current tensions limit the level of influence Beijing has over Hanoi.

Public Opinion

Warmer feelings?	United States	Medium confidence
Leading strategic power?	Unknown	N/A
Leading economic power?	Unknown	N/A

The only recent public opinion polling of Vietnamese views on the United States and China appears to be the **Democracy Perception Index**, which can only be treated with medium rather than high confidence. The 2023 survey found that 70 percent of Vietnamese respondents held a positive view of the United States and just 5 percent held a negative one, for a net approval of +65 percentage points. Meanwhile, 35 percent held a positive view of China, compared to 25 percent negative, for a net approval of +12 percentage points.

This echoes the older but more rigorous findings of the spring 2017 **Global Attitudes Survey**, in which Pew found that about 80 percent of Vietnamese respondents identified China’s power and influence as a major threat to global peace and security, while only 21 percent said the same of the United States. This far surpassed the second most identified threat, climate change, which was selected by 61 percent of Vietnamese respondents. Vietnam was the only country polled in which China was identified as the top global threat, suggesting a unique and deep-seated antipathy. But without more recent polling, the Vietnamese public’s preference for the United States over China can only be assessed with medium confidence.

Elite Opinion

Warmer feelings?	United States	Low confidence
Leading strategic power?	China	Low confidence
Leading economic power?	China	Low confidence

ISEAS surveys of Vietnamese elites provide useful data points, but the sample sizes involved are not sufficient to assess Vietnamese elite opinion with confidence. When forced to choose between the two major powers in the 2023 State of Southeast Asia survey, **77.9 percent** of Vietnamese respondents selected the United States, an increase from 73.6 in 2022. This was second only to respondents from the Philippines.

When asked whether China would “do the right thing” to contribute to global peace, security, prosperity, and governance, **78.7 percent** of Vietnamese respondents in 2023 said they had little to no confidence, up from the 64.6 percent in 2022. In contrast, only **19.8 percent** of Vietnamese respondents in 2023 said they had little to no confidence in the United States to “do the right thing,” compared to 12.5 percent in 2022.

In 2023, 55.2 percent of Vietnamese respondents identified China as the region’s predominant political and strategic power, up slightly from 52.8 percent in 2022. Only 27.2 percent of respondents in 2023 selected the United States as the region’s predominant political and strategic power, down from 32.6 percent in 2022.

Overall, **69 percent** of Vietnamese respondents in 2023 identified China as the predominant economic power in the region, down slightly from 71.5 percent in 2022. Only 9.6 percent of respondents selected the United States as the predominant economic power in the region, a slight fall from 16.7 in 2022.

Approximately 136 Vietnamese individuals responded to the ISEAS survey in **2023**, compared to roughly 112 Vietnamese respondents in **2022**.

ECONOMIC INDICATORS

Trade in goods between Vietnam and the United States amounted to **\$111.5 billion** in 2021, or approximately 17 percent of Vietnam’s trade volume that year. These trade flows are growing rapidly, up from \$75.8 billion in 2019 and \$90.8 billion in 2020. But they are also imbalanced, consisting of \$96.3 billion of goods flowing from Vietnam to the United States, or 29 percent of Vietnam’s total exports, and \$15.2 billion flowing the other direction, less than 5 percent of Vietnam’s imports.

China’s trade with Vietnam stood at **\$165.8 billion** in 2021, or approximately 25 percent of the country’s total trade that year. It is not outpacing the United States in Vietnam as badly as it does in most of the region, but this trade is also growing rapidly, up from \$117 billion in 2019 and \$133 billion in 2020. And it is imbalanced in the other direction, with \$55.9 billion in Vietnamese exports to China in 2021, accounting for 17 percent of Vietnam’s total export volume, and \$109.9 billion in Chinese imports, or 33 percent of Vietnam’s total.

The two great powers are on par with each other when it comes to investment in Vietnam. Over the past decade, the United States was the source of approximately **7 percent** of Vietnam’s inbound foreign direct investment, while China accounted for approximately **8 percent**.

The United States **spent \$896 million** and committed \$1.10 billion in assistance to Vietnam between 2015 and 2021. In the same period, China **spent \$2.37 billion** and committed \$7.29 billion in assistance to Vietnam.

Conclusion

Southeast Asia resides at the forefront of U.S.-China competition. The region has significant leverage to shape those relations, but country-by-country variance in Southeast Asian perspectives toward the United States and China helps explain why regional institutions such as ASEAN struggle to navigate great power rivalry. This variance also carries important implications for whether Washington and Beijing can successfully carry out their agendas. The one who is more responsive to intra-regional differences is likely to find more success.

The available polling indicates that the United States enjoys more soft power and popularity than China across most of the region. Even with major gaps in public polling, majorities in the most populous states—Indonesia, and especially the Philippines and Vietnam—prefer the United States to China. Whether that is still true of most elites in Southeast Asia is unclear. In any case, the overall preference for the United States among regional publics is a significant advantage for Washington as it endeavors to coax governments into aligning with it on a range of issues, or at least keep regional states from aligning with China on issues that would damage U.S. interests.

Soft power and popularity matter, but so do perceptions of hard power and the ability to deliver concrete benefits. Elites and publics in every country for which there is sufficient data, except the Philippines, see China as the predominant economic power in Asia. Most of their counterparts in places where the data is lacking probably do too. And the reality is that on most metrics, China is widening the economic influence gap.

Most of the Indonesian and Philippine publics still views the United States as the leading strategic power in the region, but who knows whether their counterparts in the rest of Southeast Asia agree. The same is true of most elites. Other than in Singapore, it is unclear whether elites among the United States' most important Southeast Asian allies and partners—Indonesia, the Philippines, Thailand, and Vietnam—still see it as the predominant strategic power in Asia. This would accurately reflect the United States' still considerable military advantages, as detailed for instance by the Lowy Institute's **Asia Power Index**. But perceptions do not always match reality; more polling is needed on this front.

Washington needs to be more attuned to how individual countries perceive their relations with the United States and China and shape its levers of engagement accordingly. Growing concern regarding China's behavior and intentions create diplomatic and economic openings across the region, and Washington should advance a positive political, security, and economic agenda to meet the moment. One component should be an expansion of public and elite opinion polling in Southeast Asia so the United States can better understand how it is being perceived, target initiatives where they can have the greatest impact, and judge year-over-year progress. ■

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