



Public opinion in the Indo-Pacific:

Divided on China, cheering for US & EU

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1 Introduction

This report presents the results of public opinion surveys conducted online in **15 countries across the Indo-Pacific between April and September 2022**.¹ The research sample (n = 18,157) was representative of gender, age, and region for each country, as well as religion or ethnicity in India, Malaysia, and Kazakhstan. This survey of 15 countries is part of a broader research project, 'Sinophone Borderlands – Interaction at the Edges,' funded by the European Regional Development Fund and run by Palacky University Olomouc in collaboration with the Central European Institute of Asian Studies (CEIAS).

This report summarizes some of the main findings from the 15 countries: Japan, South Korea, Taiwan, Indonesia, Malaysia, the Philippines, Singapore, Thailand, Vietnam, Bangladesh, India, Pakistan, Kazakhstan, Australia, and New Zealand.

The results reveal significant divisions within the Indo-Pacific regarding China. **Respondents from countries closer to the West in development and ideology tend to hold negative views of China.** The US and the EU, furthermore, both enjoy a relatively good image among respondents in the region as a whole, with most respondents preferring alignment with the West over China. Nevertheless, **China has also built strong relationships in the region, not only with Pakistan, Bangladesh, and Kazakhstan but also with Thailand, Indonesia, and Malaysia.** Substantial majorities of these countries hold positive feelings toward China.

In terms of military, economic, and soft power, the US is perceived as powerful by the largest proportion of respondents in most countries. China is also perceived as relatively strong militarily and economically, but its cultural attractiveness tends to be seen as lower than that of the US and the EU. Europe lags behind regarding military and economic power, but the vast majority of respondents saw it as culturally attractive and tended to have a high opinion regarding the quality of life in Europe.

On the policy front, when asked to choose between China or the US, most respondents said they would prefer their countries align with Washington rather than Beijing. However, the survey also suggests that Indo-Pacific citizens' appetite for great power competition is weak. Outside of Vietnam and Taiwan, preventing China's geopolitical expansion was among the least likely to be ranked as a priority in their China policies. **Results from many countries suggested a belief — or hope — that the region is large enough for two superpowers.**

2 Feelings towards China, the US, and other countries²

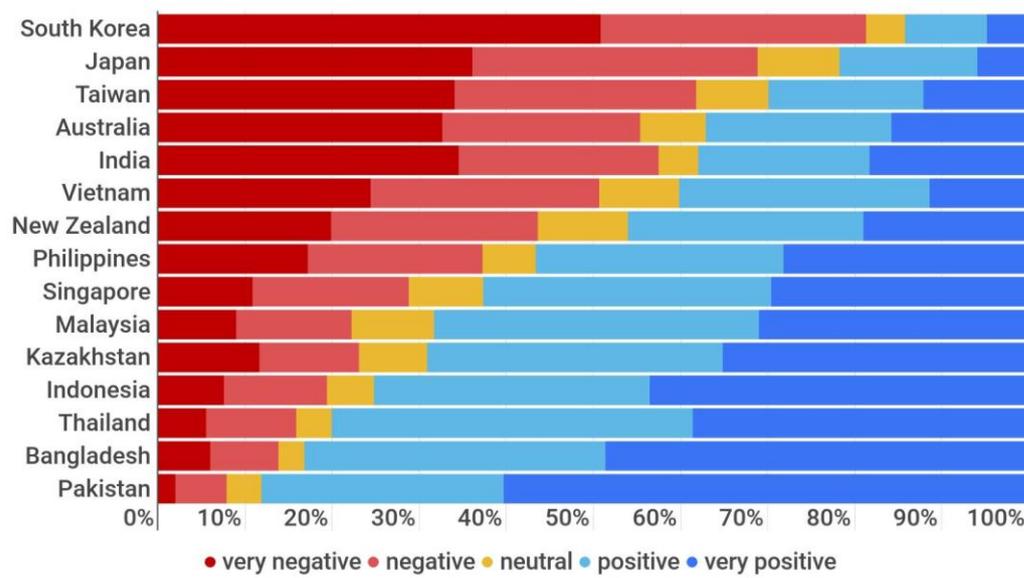
The survey results indicate that China is seen quite favorably in South, Southeast, and Central Asia, whereas Northeast Asia, together with Australia, India, and Vietnam, hold predominantly negative views of China (*Figure 1*). South Korea (81%), Japan (69%), Taiwan (62%), and India (57%) are among those with the largest proportion of respondents who perceive China in a negative light. Indeed, our recent report on *South Korean public opinion on the world in times of global turmoil*³ confirmed that China was the most negatively perceived country among South Koreans, whereas the US was perceived largely positively. Negative sentiment towards China also prevails in Australia and Vietnam.

A common denominator among the negativity towards China in these countries is generally tensed bilateral relations. One can also recognize the roles of historical grievances and maritime disputes (Vietnam) and China's bellicose responses to criticism of its human rights record or early Covid19 policies (Australia). In New Zealand, which has avoided the ire of China's "wolf warrior diplomacy" by maintaining a quieter diplomatic policy, respondents were evenly divided in their feelings towards China.

On the opposite end of the spectrum stand Pakistan, Bangladesh, Thailand, and Indonesia, where more than 80% of respondents see China positively. Kazakh and Malaysian respondents were also among the most likely to perceive China positively, with about 70% of those surveyed indicating warm feelings toward China. These findings are not surprising given that both countries have maintained friendly bilateral relations, enhanced by deep political and economic cooperation in strategic sectors and China's position as one of their biggest investors. Chinese relations with Pakistan and Bangladesh have evolved into relationships marked with broad common interests. Generally, a majority of respondents from Southeast Asia have more positive attitudes towards China, which may have to do with their nations' decades-long cooperation with China, Chinese investments in their countries, and their overall positive image of China as a successful

economy. The relatively positive perception of Philippine citizens toward China appears to contrast with some public manifestations of anti-China sentiment in the country. However, previous polling shows comparable results.⁴

Figure 1: Feeling towards China in the Indo-Pacific (% of respondents)

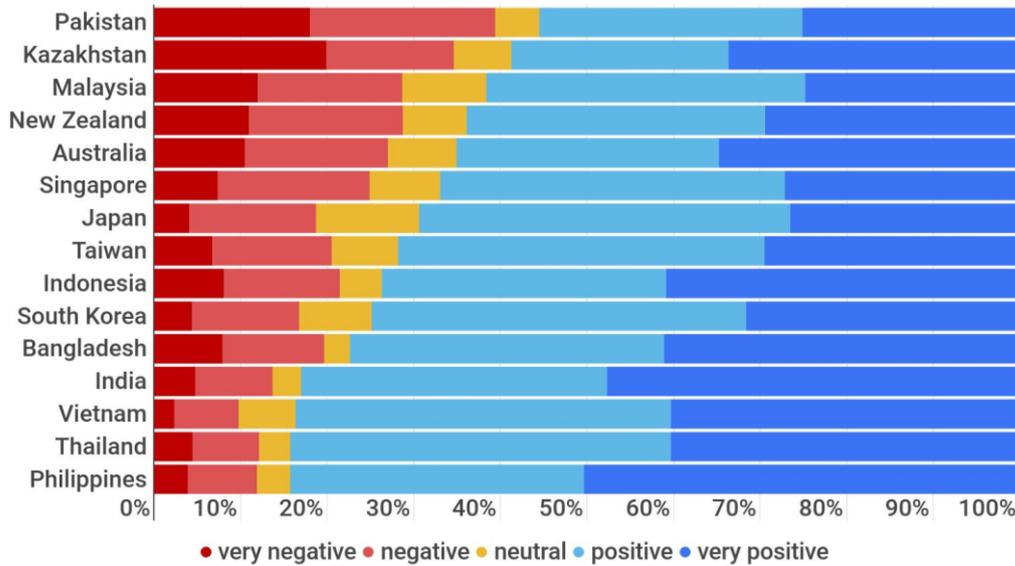


Regarding perceptions of the US in the Indo-Pacific, *Figure 2* shows that most respondents in all 15 countries view it positively. Pakistan, Kazakhstan, and Malaysia have the smallest shares of respondents with positive views on the US – 39% of Pakistanis display a negative attitude towards the US, making their country first in terms of negative attitudes towards the US. In addition, around one-fifth of respondents from New Zealand (29%), Australia (27%), Singapore (25%), Indonesia (21%), Taiwan (21%), and Bangladesh (20%) also reported negative feelings towards the US. On the other hand, the vast majority of respondents from the Philippines (84%), Thailand (84%), Vietnam (84%), and India (83%) hold positive views of the US.

These results suggest that neither a long-term alliance with the US nor the China-US rivalry translates into positive perceptions of one over the other by the public. The US is also perceived positively in countries where most respondents hold favorable perceptions of China, such as Pakistan, Bangladesh, and Thailand. Despite the intensifying US-China geostrategic

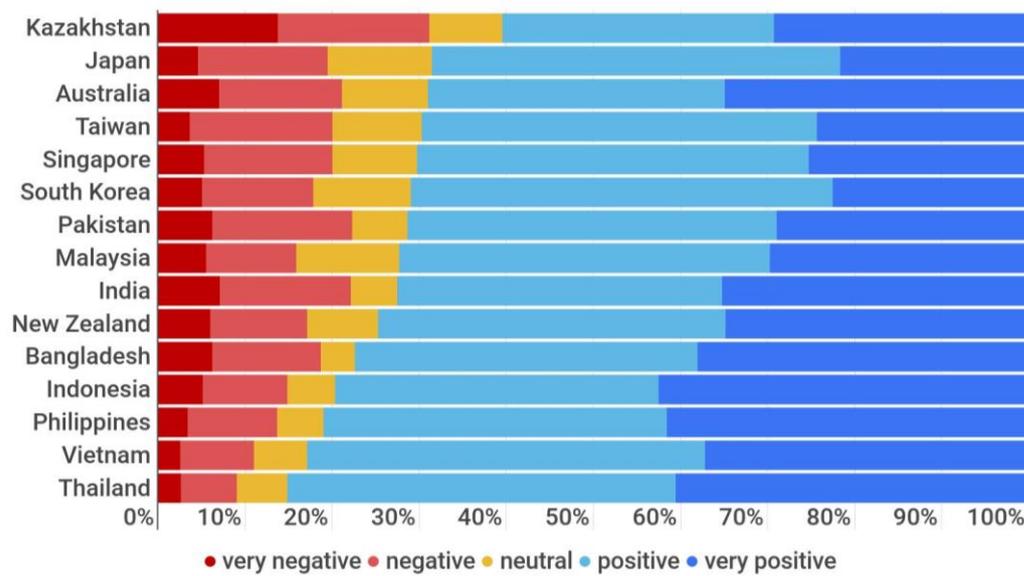
rivalry, few respondents appear to perceive an either-or choice between the two.

Figure 2: Feeling towards the US in the Indo-Pacific (% of respondents)



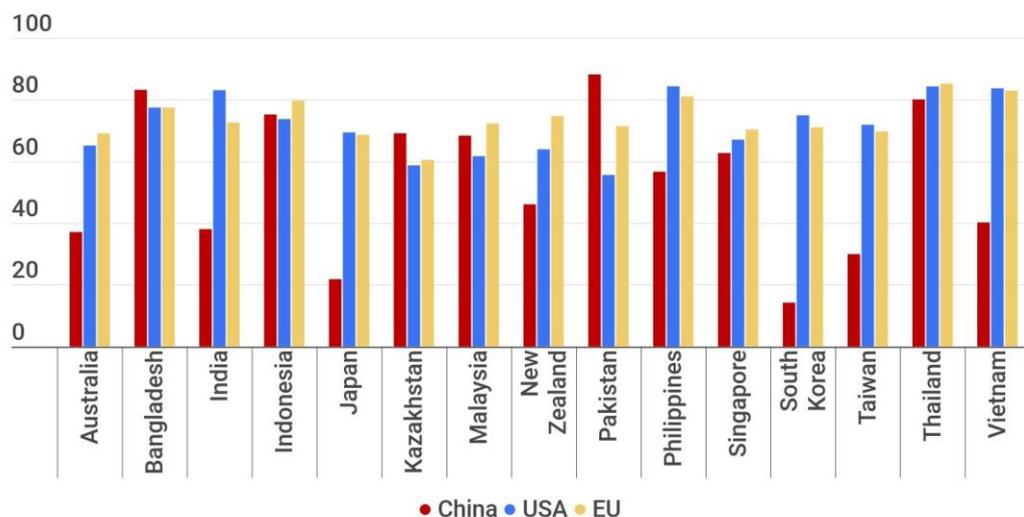
Like the US, the EU is seen quite positively in the Indo-Pacific (*Figure 3*). More than half of respondents in all countries surveyed indicated positive feelings towards the European bloc. Kazakhstan (31%), Pakistan (22%), India (22%), and Bangladesh (19%) have the largest proportion of respondents who display negative feelings toward the EU. At the same time, more than four-fifths of respondents from the Philippines (81%), Vietnam (83%), and Thailand (85%) report favorable views of the EU. Interestingly, countries with which the EU has developed strategic partnerships, including Japan and South Korea, have relatively low proportions of respondents indicating positive views towards the EU. This suggests that the EU’s trade and diplomatic outreach efforts may have little to do with the Indo-Pacific countries’ positive perceptions toward Europe.

Figure 3: Feeling towards the EU in the Indo-Pacific (% of respondents)



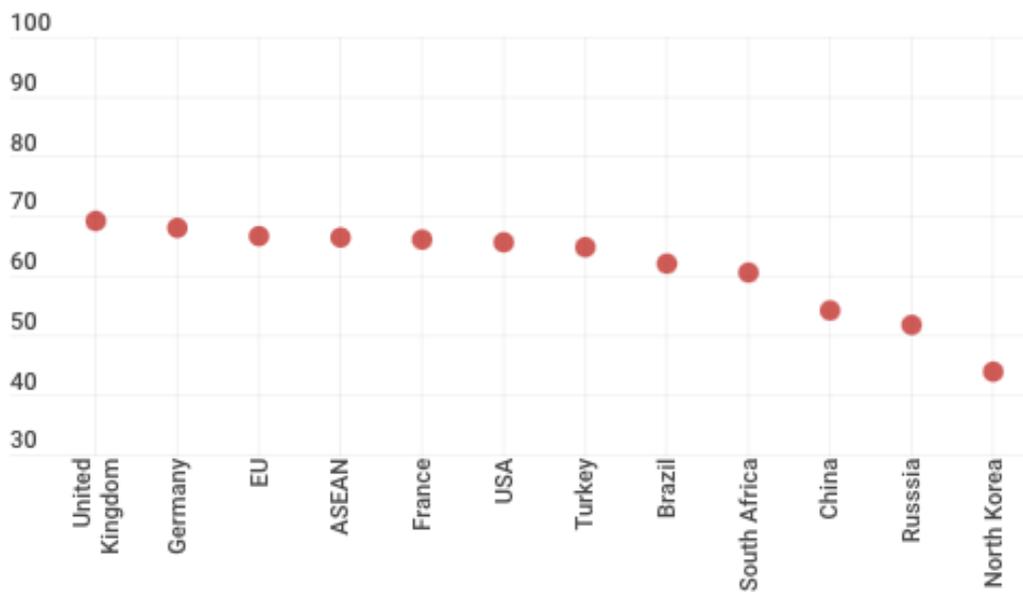
The US is the most popular of the three major actors in the region overall (Figure 4). In ten countries, the US was perceived positively by a larger share of respondents than China (Australia, India, Japan, New Zealand, the Philippines, Singapore, South Korea, Taiwan, Thailand, and Vietnam). While in Singapore and Thailand, the difference is rather marginal, in other countries, the image of the US still appears in better shape. In contrast, China seems to have won the ‘hearts and minds’ of people in Bangladesh, Indonesia, Kazakhstan, Malaysia, and Pakistan. Still, the difference is more substantial only in Pakistan.

Figure 4: Feeling towards the US and China (% of respondents with positive views)⁵



With the combined responses from all 15 countries surveyed, *Figure 5* demonstrates that the EU and individual states located in Europe are perceived more favorably than the US or China. The United Kingdom and Germany are both perceived positively on average, with an average score above 68 degrees on the thermometer (where 0 represents cold, negative feelings, 50 represents neutral, and 100 represents warm, positive feelings). The EU, ASEAN, and France also have favorable mean values of 66 degrees, followed by the US, Turkey, Brazil, and South Africa at slightly above 60 degrees on average. China's average was 54 degrees, only placing it above Russia and North Korea. This means that, except for North Korea, the image of all the countries is generally positive, although significantly less so for China and Russia than for other countries.

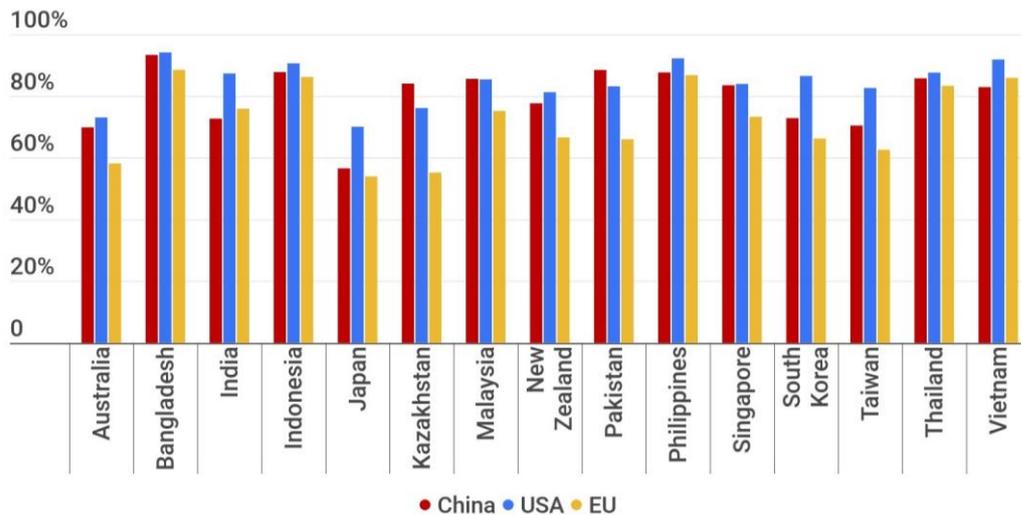
Figure 5: Feeling towards selected countries/entities in the Indo-Pacific (15 countries combined, mean values)⁶



3 Comparing great powers

Regarding perceptions of military might, the vast majority of surveyed respondents consider China and the US to be the most powerful (*Figure 6*). The US is perceived as militarily strong by the largest proportion of respondents in most countries. The only exceptions are Kazakhstan and Pakistan, where a greater percentage of respondents consider China to be militarily strong. In most states surveyed, there is little difference in the proportions of respondents who view the US and China as militarily strong. However, in India, Japan, South Korea, and Taiwan, significantly more respondents think of the US as powerful. Given that the EU lacks a substantial unified military, it is perhaps unsurprising that respondents consider the EU as less militarily powerful when compared to scores for the US and China.

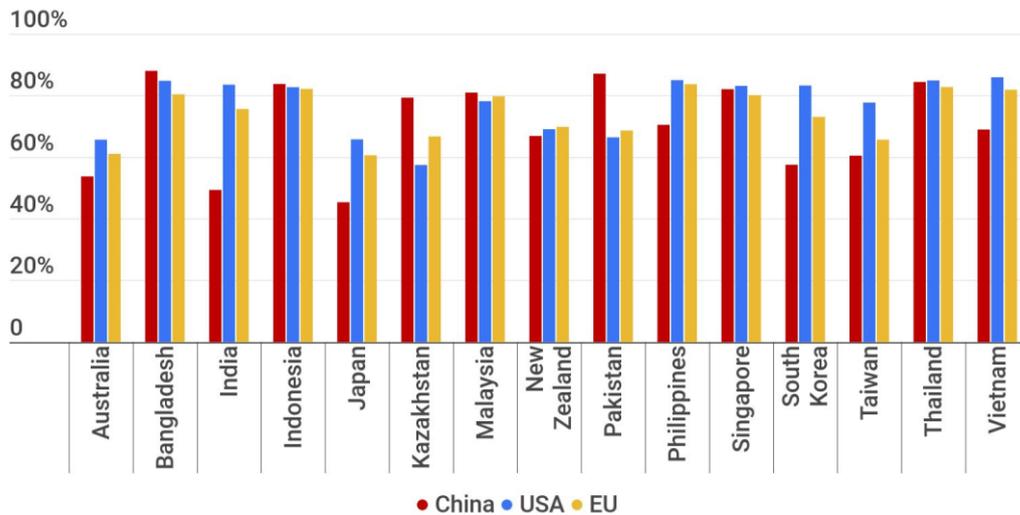
Figure 6: Perception of the military power of the US, China, and the EU, (% of respondents finding them strong)⁷



China is viewed as economically important by the largest proportion of respondents in Bangladesh (88%), Indonesia (84%), Kazakhstan (79%), Malaysia (81%), and Pakistan (87%) (*Figure 7*). This correlates with the generally favorable views of China in these countries, illustrated in *Figure 1*. In countries with less positive views of China, perceived economic

importance also tends to be comparatively lower, including in Australia, India, Japan, New Zealand, the Philippines, South Korea, Taiwan, and Vietnam. Among respondents in these countries, the US and the EU were more likely to be perceived as important economic partners.

Figure 7: Perception of economic importance of the US, China, and the EU (% of respondents finding them important)⁸



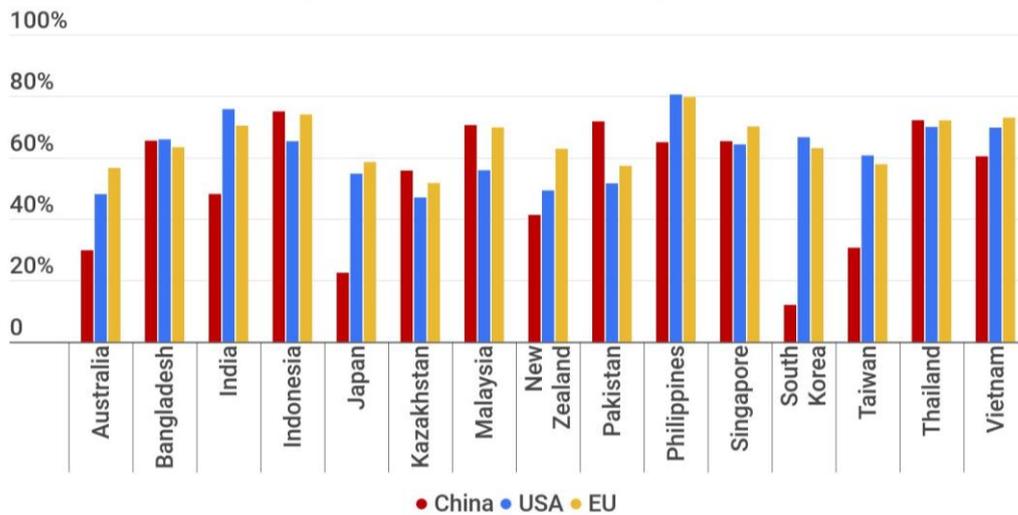
The EU’s cultural attractiveness seems to be generally strong across the Indo-Pacific (*Figure 8*). Europe ranks first in six countries, namely Australia, Japan, New Zealand, Singapore, Thailand, and Vietnam. Additionally, it ranks second among the other nine states, including India, Indonesia, Kazakhstan, Malaysia, Pakistan, the Philippines, South Korea, and Taiwan.

The US was the most likely to be perceived as culturally attractive by Indian, South Korean, and Taiwanese respondents, while in Bangladesh and the Philippines, a similar proportion of respondents also see China and the EU in the same light, respectively.

China is perceived as culturally attractive by the majority of respondents in states where it is perceived favorably overall (see *Figure 1*), such as Bangladesh, Indonesia, Malaysia, Pakistan, the Philippines, Singapore, and Thailand. Despite the largely unfavorable perception of China in Vietnam, it was seen as culturally attractive by a substantial majority of Vietnamese respondents. Hence Vietnamese seem to admire the Chinese culture, which they have interacted with for millennia while remaining wary of “China” and

its government policies. By contrast, most Australian, Korean, and Taiwanese respondents claimed they do not find China very culturally attractive.

Figure 8: Perception of cultural attractiveness of the US, China, and the EU (% of respondents finding them attractive)⁹

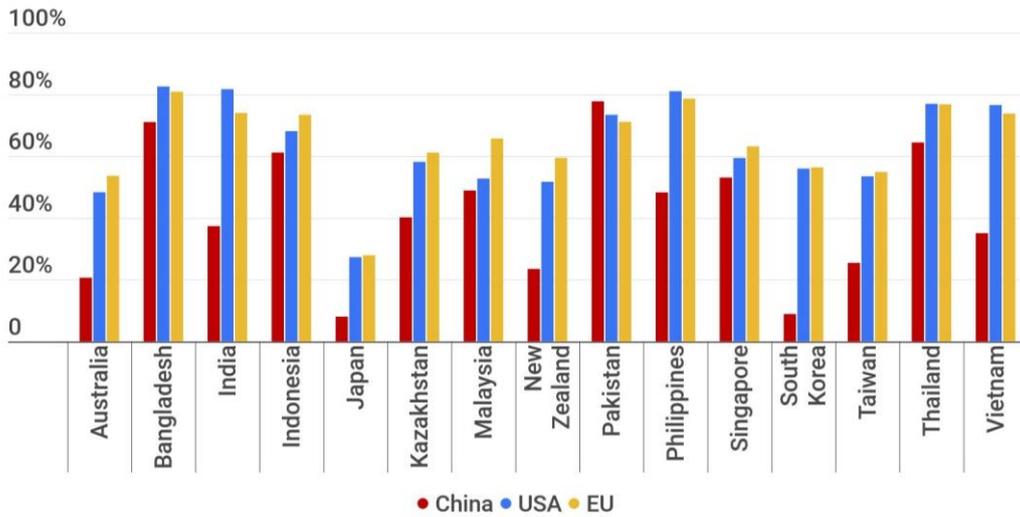


Regarding respondents’ perception of the quality of life in the three great powers, China trails behind by a wide margin (*Figure 9*). The only exception is Pakistan, where almost 80% of respondents think the quality of life in China is good, ahead of the US and the EU. Only a small fraction of respondents from Japan and South Korea think people living in China enjoy good lives, which corresponds to largely negative perceptions of China in the two countries. Only about 20% of Australians, New Zealanders, and Taiwanese believe life in China to be good.

European and American quality of life is seen as good by comparable proportions of respondents in most countries surveyed. Between 70% and 80% of respondents from developing nations in the Indo-Pacific were convinced that life in the US and the EU is good. Respondents from more developed Indo-Pacific countries appear to be relatively more satisfied with the standard of living they enjoy in their home countries and, thus, less impressed by how people in Europe and the US live. This may be particularly true for Japan, where a majority of respondents indicated that their quality of life would be neither good nor bad in the USA and EU. Such results could

indicate a higher level of satisfaction with the conditions in Japan but also point to the inward-looking tendencies in Japanese society.

Figure 9: Perception of the quality of life in the US, China, and the EU, (% of respondents finding it good)¹⁰

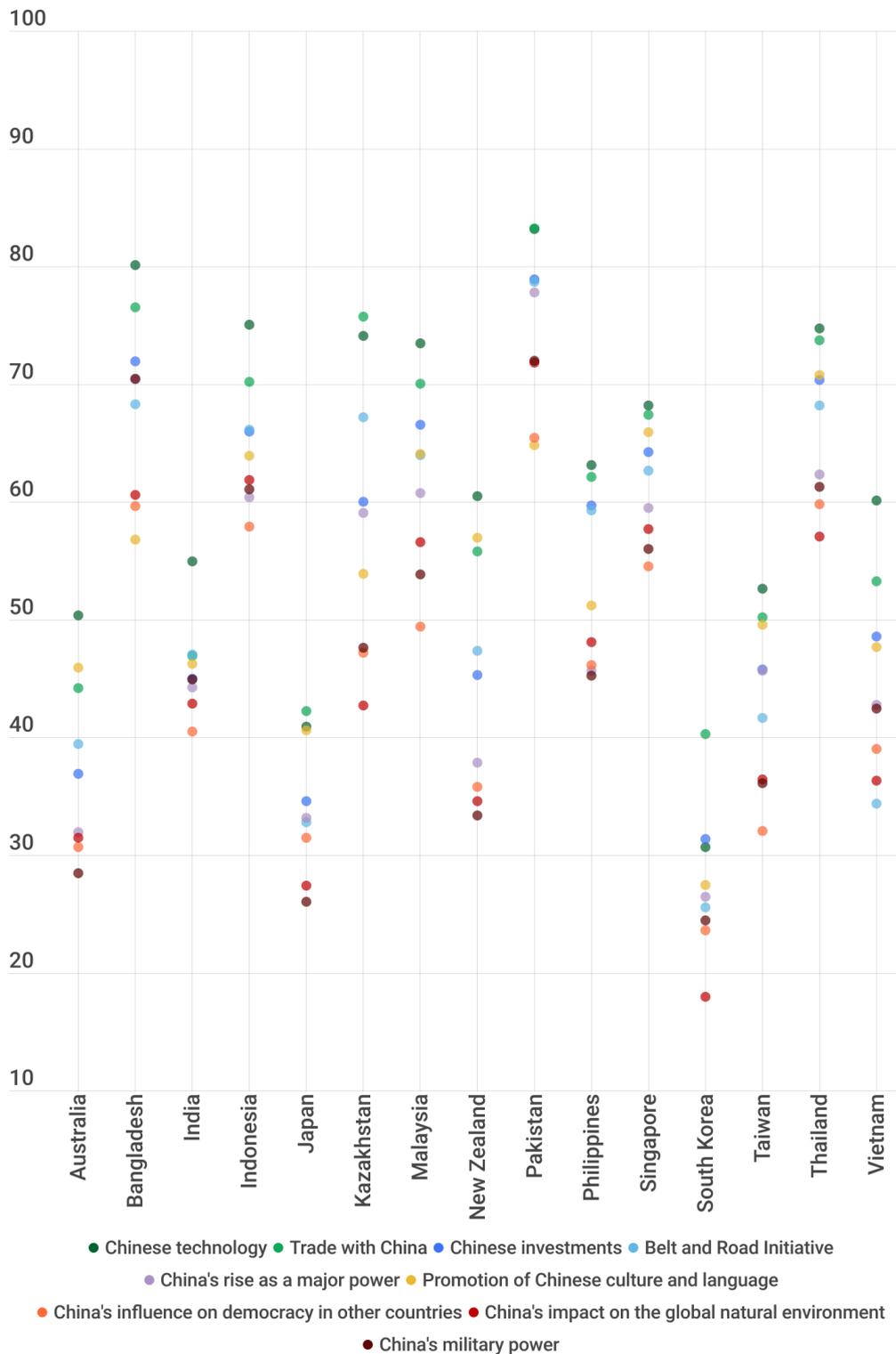


4 Aspects of China's international presence

Turning to specific aspects of China's international presence, Chinese technology, trade ties, and investments are perceived as predominantly positive in most Indo-Pacific countries surveyed (*Figure 10*). Nonetheless, the level of positive feelings differs significantly across individual states. Respondents were asked to indicate their feelings towards nine aspects of China's international presence on a 100-degree thermometer. Almost all were perceived as predominantly positive in the less developed countries, while respondents from more developed Indo-Pacific countries were much more skeptical. Singapore is an exception to this trend – being highly developed, its population is predominantly positive to all aspects of interaction with China.

South Koreans and Japanese manifest the highest level of negativity towards the various aspects of China's international influence, with average scores well below 50 on the 100-degree thermometer. Respondents in Taiwan, Australia, New Zealand, India, and Vietnam also, on average, expressed negative attitudes toward most issues – Chinese technology and, in Vietnam's case, trade with China were the only exceptions. In contrast, respondents from Pakistan, Bangladesh, Thailand, and Kazakhstan indicated positive feelings towards all nine issues, with average scores between 60 and 80 on the thermometer. This again demonstrates significant divisions within the region regarding China, but *Figure 10* also illustrates how various aspects of China's international presence are also perceived differently within individual countries.

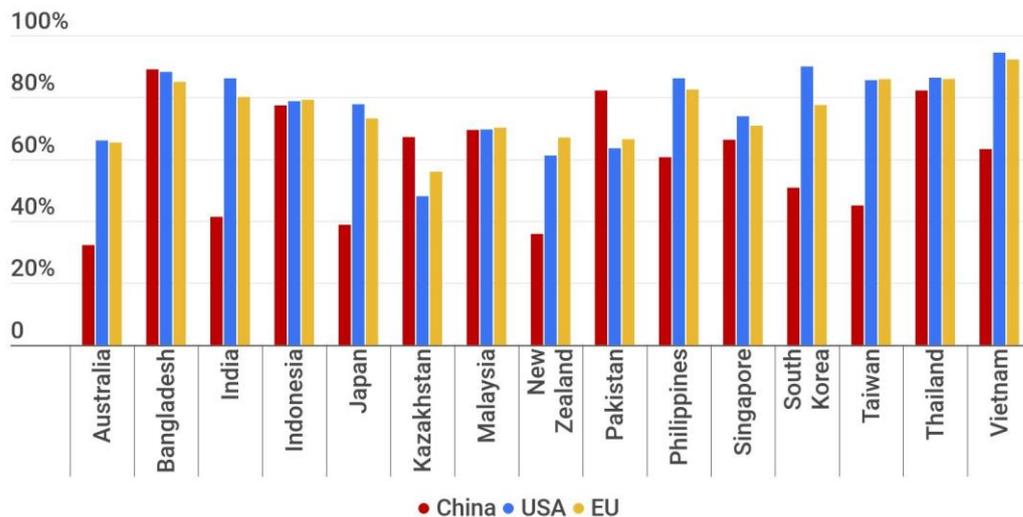
Figure 10: Feeling towards the issues related to China in the Indo-Pacific (mean values on the 100-point thermometer)¹¹



5 Foreign policy preferences

Regarding the respondents' preferences on foreign policy alignments, the US and the EU were clearly the most favored option in nine countries of the Indo-Pacific (*Figure 11*). More than 60% of respondents from Australia, India, Japan, New Zealand, the Philippines, Singapore, South Korea, Taiwan, and Vietnam agreed with the idea of aligning closely with the US and the EU, while those who would also agree with aligning with China were in the minority. China was the most preferred foreign policy partner in Bangladesh, Kazakhstan, and Pakistan, and only in the latter two was the difference more substantial.

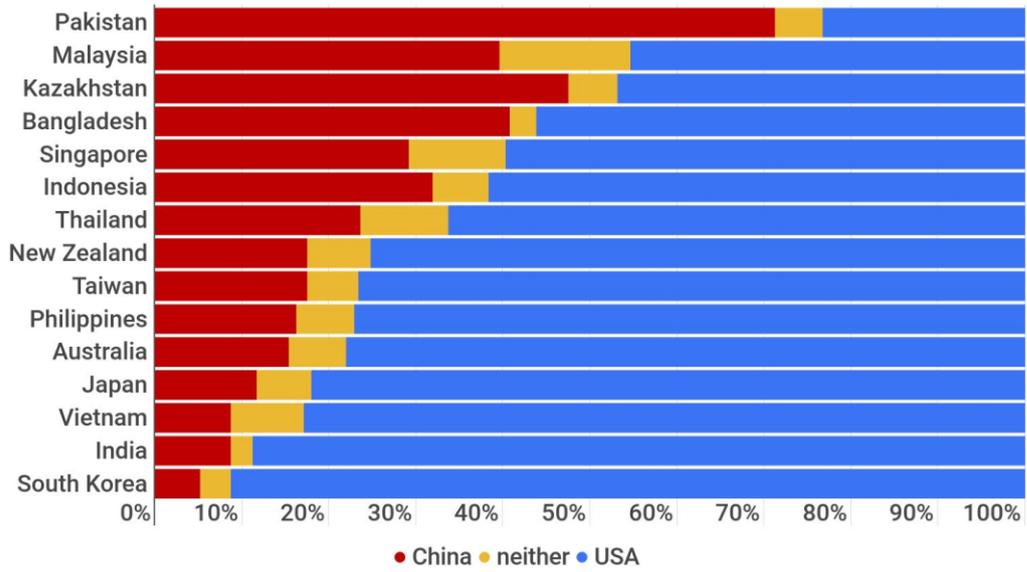
Figure 11: How closely should your country's foreign policy align with the following actors? (% of respondents who wish to align closely)



When directly asked to choose between China or the US, most respondents from the surveyed countries said they would prefer their countries to align with Washington over Beijing (*Figure 12*). Only in Pakistan would a clear majority of the respondents choose alignment with China over the US, while in Malaysia, Kazakhstan, and Bangladesh, the respondents were divided more or less equally on the question. A predominant share of respondents

from South Korea, India, Vietnam, Japan, Australia, the Philippines, Taiwan, and New Zealand would prefer alignment with the US.

Figure 12: If you had to decide between the USA and China, which would you choose to align with? (% of respondents)



6 Priorities in China policies

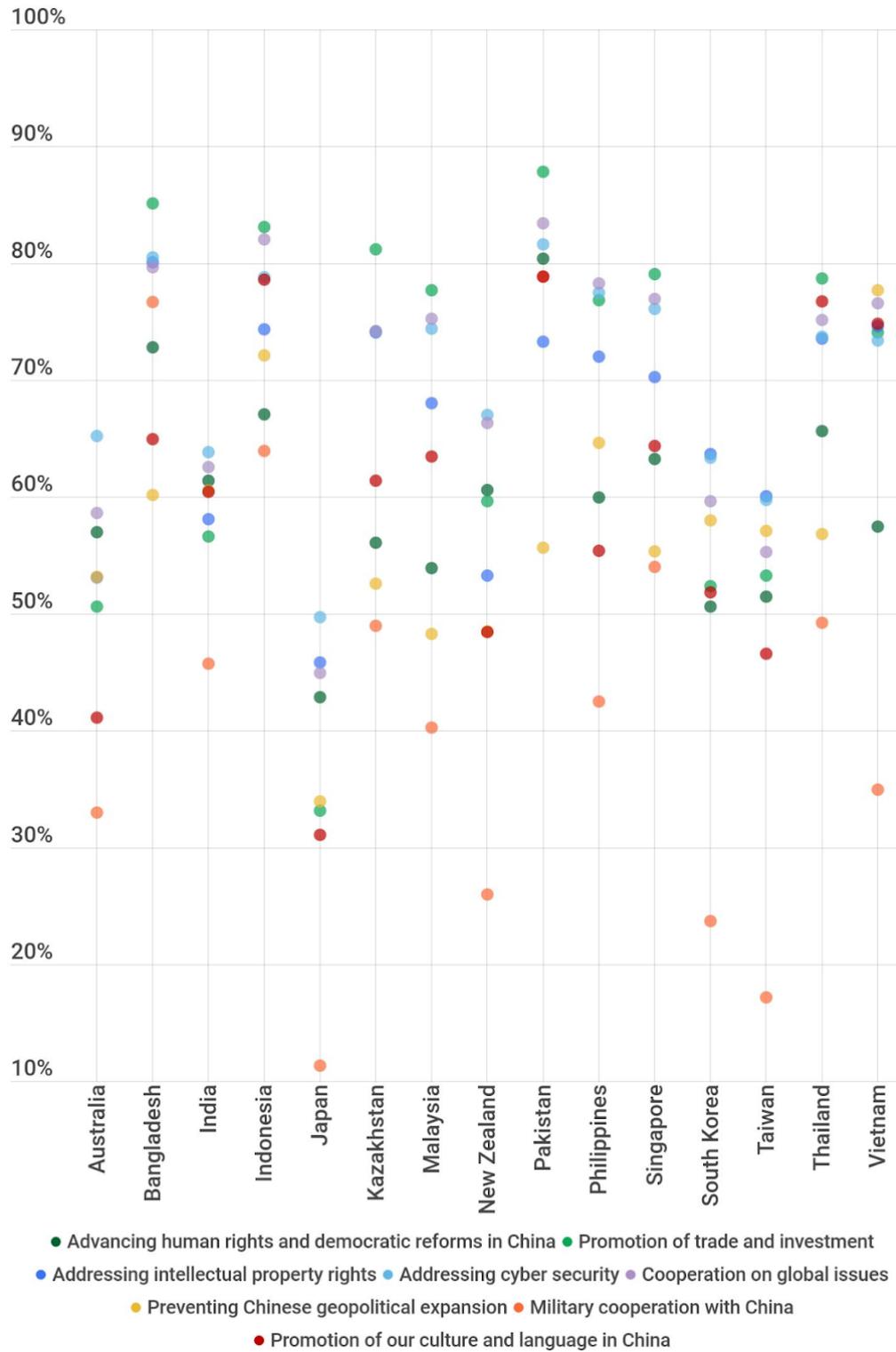
The way China is perceived in the individual countries of the Indo-Pacific translates into their foreign policy priorities vis-a-vis China. Respondents were presented with a menu of eight policy areas – advancing human rights, expanding trade, intellectual property protection, cyber security, cooperation on global challenges, preventing China’s geopolitical expansion, military cooperation, and cultural promotion – and asked to indicate to what extent they agreed or disagreed with each as a policy priority in their country’s approach towards China.

The results show that countries with positive feelings toward China tend to support broad-ranging China policy agendas, while others are significantly more cautious (*Figure 13*). Respondents in more developed democratic countries are much more likely to favor foreign policy agenda items addressing their own conflicts and concerns related to China, such as cyber security and intellectual property rights. In contrast, the vast majority of respondents from less developed nations indicate support for pursuing almost all of the listed options.

Promoting trade and investments was the top agenda item for respondents from Bangladesh, Indonesia, Kazakhstan, Malaysia, Pakistan, the Philippines, Thailand, and also Singapore. Appetites for geostrategic competition appear weak. Vietnam is the only country where the largest share of respondents supported preventing Chinese geopolitical expansion as a policy priority. Interestingly, Japanese respondents indicated little inclination towards prioritizing the prevention of China’s strategic advance.

In general, the promotion of trade and investment, cyber security, cooperation on global issues, and addressing intellectual property rights were seen as key China policy priorities around the Indo-Pacific. Meanwhile, military cooperation with China, together with the promotion of one’s own culture and language in China, were the least supported China policies.

Figure 13: Foreign policy preferences towards China (% of respondents agreeing)



Endnotes

- ¹ In Australia, the Philippines, Indonesia, Japan, South Korea, Malaysia, New Zealand, Pakistan, Singapore, Thailand, and Taiwan the data collection took place in between April and June 2022. In Bangladesh and Kazakhstan between April and September 2022. In India, and Vietnam between August and September 2022.
- ² Respondents were asked to give each country a numerical ranking between 0 and 100, representing their feeling towards them, where 0 represents cold, negative feelings, 50 represents neutral, and 100 represents warm, positive feelings. Responses were then grouped into five categories as very negative (0-20), negative (21-45), neutral (46-54), positive (55-79), and very positive (80-100).
- ³ Turcsanyi, Richard Q., Klara Dubravcikova, Su-Jeong Kang, James Iocovozzi, Matej Simalcik, Lucia Husenicova, *South Korean public opinion on the world in times of global turmoil: US yay, China nay, Japan meh*, Palacky University Olomouc, September 2022. ISBN: 978-80-8239-008-0. https://ceias.eu/wp-content/uploads/2022/09/Korean-poll-finaldraft-adjustments-3-1_rqt-1-2.pdf.
- ⁴ Pew Research Center polling between 2015 and 2018 found majority-favorable views towards China in the Philippines, but this fell to less than 50 percent in 2019: <https://www.pewresearch.org/global/database/indicator/24/country/ph>; Philippine pollsters have consistently found general “trust” in China to be low, with only around 25% of Filipinos saying they trust China. <https://pulseasia.ph/wp-content/uploads/2022/09/MR4-UB2022-2-MR-on-Trust-in-Selected-Countries.pdf>; <https://www.sws.org.ph/swsmain/artcldisppage/?artcsyscode=ART-20200719141007>. The contrast between these results suggests favorability towards China includes a significant component of economic considerations.
- ⁵ This figure shows the proportion of respondents who indicated positive perceptions of the US and China.
- ⁶ This figure shows the mean scores for each country, calculated from all responses across the 15 states surveyed.
- ⁷ The respondents were asked: "How militarily powerful or militarily weak do you consider the following countries/entities?" and offered a 7-point scale indicating the following options: (1) very weak, (2) weak, (3) somewhat weak, (4) neither, (5) somewhat strong, (6) strong, and (7) very strong. The figure shows the proportion of respondents who selected options 5 to 7 in each state.
- ⁸ The respondents were asked: "How important or unimportant do you consider the following countries/entities for the development of your country's economy?" and offered a 7-point scale indicating the following options: (1) very unimportant, (2) unimportant, (3) somewhat unimportant, (4) neither, (5) somewhat important, (6) important, and (7) very important. The figure shows the proportion of respondents who selected options 5 to 7 in each state.
- ⁹ The respondents were asked: "How attractive or unattractive do you consider the cultures of the following countries/entities?" and offered a 7-point scale indicating the following options: (1) very unattractive, (2) unattractive, (3) somewhat unattractive, (4) neither, (5) somewhat attractive, (6)

attractive, and (7) very attractive. The figure shows the proportion of respondents who selected options 5 to 7 in each state.

- ¹⁰ The respondents were asked: "How good or bad would life be for a person like you if you were to live in these places?" and offered a 7-point scale indicating the following options: (1) very bad life, (2) bad life, (3) somewhat bad life, (4) neither good nor bad life, (5) somewhat good life, (6) good life, and (7) very good life. The figure shows the proportion of respondents who selected options 5 to 7 in each state.
- ¹¹ The respondents were asked: "How positively or negatively do you feel about the following issues on a scale of 0 to 100, where 0 represents cold, negative feelings, 50 represents neutral, and 100 represents warm, positive feelings?" The figure shows the weighted mean values of all responses in each country.

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About CEIAS

The Central European Institute of Asian Studies (CEIAS) is an independent think tank based in Bratislava (Slovakia), and with branches in Olomouc (Czech Republic), and Vienna (Austria).

The main goal of CEIAS is to spread knowledge about Asia among scholars and experts in Central Europe and beyond, while also informing the public about Central European activities in Asia.

To this end, CEIAS conducts and publishes its research, organizes public seminars and conferences, supports education on Asian topics, and communicates with the local, regional, and international media.

CEIAS activities focus mainly on international relations and security studies in East, Southeast, South, and Central Asia. CEIAS cooperates with a number of experts and similar organizations in the region and beyond.

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About Sinophone Borderlands

The Sinophone Borderlands – Interaction at the Edges is an excellent research project based at the Palacký University Olomouc, Czech Republic. The project is funded by the European Regional Development Fund, project no. CZ.02.1.01/0.0/0.0/16_019/0000791.

The main idea of the project is to explore how the Chinese-speaking world interacts with other worlds, including those at its border (Slavophone, Tibetophone, Turco-Persophone, or Austroasiatophone worlds), as well as those who may be more distant (such as Anglophone, Hispanophone, Francophone, and others).

The Sinophone Borderlands research team consists of researchers from various disciplines under three main Research Groups - Political Science, Anthropology, and Linguistics. This allows for a cross-disciplinary dialogue and cross-cultural comparisons which pushes the academic studies of China and Asia beyond the limits of current disciplinary and national frameworks.

The Sinophone Borderlands is a research project that engages primarily in activities such as publishing academic journal articles, books, or participating in conferences and workshops.

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