

**The Asian
Research
Network**

**SURVEY ON
AMERICA'S ROLE IN
THE INDO-PACIFIC**

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Research conclusions are derived independently and authors represent their own view rather than an institutional one

Contact

United States Studies Centre

Institute Building (H03),
City Rd,
University of Sydney
NSW 2006
Australia

[✉ us-studies@sydney.edu.au](mailto:us-studies@sydney.edu.au)
[@ +61 2 9351 7249](tel:+61293517249)
[@USSC](https://twitter.com/USSC)
[📍 ussc.edu.au](https://www.ussc.edu.au)

Perth USAsia Centre

M265, 3rd Floor, Old Economics Building
The University of Western Australia
35 Stirling Highway
Crawley WA 6009
Australia

[✉ perthusasiacentre@uwa.edu.au](mailto:perthusasiacentre@uwa.edu.au)
[@ +61 8 6488 4320](tel:+61864884320)
[@PerthUSAsia](https://twitter.com/PerthUSAsia)
[📍 PerthUSAsia.edu.au](https://www.PerthUSAsia.edu.au)

Foreword

Gauging public opinion is a key tool for policy makers and others to better understand levels of popular concern about issues and support for national priorities. This also applies to foreign policy and international relations. In October 2015 the United States Studies Centre at the University of Sydney and the Perth USAsia Centre at The University of Western Australia, in cooperation with a network of partner institutions, conducted a public opinion survey on America's Role in the Asia Pacific almost simultaneously and with nearly identical questions in Australia, China, Indonesia, Japan and Korea. The results of this survey were released in 2016 with a particular focus on comparing and contrasting different national perspectives on the major issues in the region.

While a single data point or "snapshot" is interesting, additional data points, particularly over time, provide the opportunity to identify trends and assess the impact of particular developments on public opinion. Between Brexit in the United Kingdom, the election of Donald Trump in the United States, tensions in the South China Seas and progress in North Korea's missile and nuclear programs, there were significant developments in 2016 which might be presumed to influence public opinion in Asia about America's role in the region.

To test that presumption, in March of 2017 we conducted a second survey, composed largely of the same questions as our first survey with a few new questions to capture specific reactions to recent developments.

As in 2015, this process has benefited tremendously by the collaborative efforts of a network of partner institutions in the region. In addition to the United States Studies Centre and the Perth USAsia Centre in Australia, we were joined by the Foreign Policy Community Indonesia, the Shanghai Institute for International Studies in China, the Canon Global Institute in Japan and the Asan Institute for Policy Studies in Korea. Of note, in recognising the growing reality of an "Indo-Pacific" region, this year we opted to expand the survey to include results from India and we welcomed Brookings India to our network. As before, this "Indo-Pacific Research Network" worked together to help refine the survey and analyse the results. This summary publication not only includes an overview of key findings, but also country-specific chapters from each of our partner institutions, highlighting the results most relevant to their national perspectives.

Once again we recognise the excellent survey work done by the other organisations such as the Pew Research Centre, the Chicago Council on Global Affairs and others in the region, including our network partners. It is our hope that this survey, conducted as it has been by a network of institutions based in the Indo-Pacific and benefiting from a collective regional perspective in approach, will provide a point of view unique to those surveys driven by United States-based institutions.



Professor Simon Jackman
Chief Executive Officer
United States Studies Centre at the
University of Sydney



Professor Gordon Flake
Chief Executive Officer
Perth USAsia Centre at the
University of Western Australia

Executive Summary

The survey was conducted during the first weeks of March 2017. During this period the global landscape was dominated by events that included the United States (U.S.) Presidential election campaign, the lead-up to an Australian Federal election, the slowdown of Chinese economic growth to a 'new normal', the acceleration of North Korea's nuclear missile testing, the impeachment of South Korean President Park Geun-Hye and the deployment of the Terminal High Altitude Area Defence (THAAD) system on the Korean Peninsula. These events, in the region and beyond, provide the backdrop against which responses were gathered.

The overall survey results show that assessments of American influence and value in the region have diminished – particularly in Australia, Japan and Korea, but not in China. All surveyed countries, except China, generally perceive that the U.S. has a positive influence in the region, all countries see trade with the United States as overwhelmingly positive and all countries are in favour of free trade agreements. India (67%), China (54%) and Indonesia (37%) welcome

foreign investment in critical infrastructure while Korea (26%), Japan (21%) and especially Australia (18%) do not. Highest levels of isolationism were reported in India (50%) and Australia (43%) with China reporting the lowest levels (18%). Among all surveyed countries, Australia and Korea place the highest value on democracy although all value democratic forms of government.

In Australia, respondents increasingly see China as having the most influence in the Indo-Pacific region (72%). More than half of Australians (62%) perceive American influence in the next five years as negative under U.S. President Donald Trump. Despite this, most Australians (71%) still see the U.S. as the global 'rule setter' and the majority of Australian respondents (93%) believe in the Australia-U.S. Alliance such that in the event of a crisis America would come to Australia's aid. Australians remain concerned about Islamic extremism (37%) although are increasingly concerned about possible involvement in a conflict with China (13%) and internal political instability among its Asian neighbours (12%).



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Australian Foreign Minister Julie Bishop
and U.S. Secretary of State Rex Tillerson,
Washington, D.C., on February 22, 2017

Executive Summary

In China, most perceive the influence of the United States in the region as declining with its best years in the past (71%) and see the U.S. as doing more harm than good in the region (43%). The majority of Chinese respondents appreciate the importance of the U.S.–Chinese bilateral relationship and feel it has improved since the 2016 report despite the public negativity towards China expressed during President Trump's election campaign. More than half of Chinese respondents (65%) believe China will eventually become a superpower and replace the U.S.. Chinese respondents generally perceive isolationism unfavourably (82%), however, concern about a conflict between North and South Korea has markedly increased amongst Chinese respondents (64%).

Indian respondents are the most optimistic about the U.S. with 61% believing that its best years are ahead of it. Strikingly, 53% of Indian respondents believe that India will have the most influence in Asia in the next 10 years, contrasting with the views of Japan (15%), Australia (6%), South Korea (3%), China (1%) and Indonesia (1%). More than half of Indian respondents (52%) feel that the U.S. does more good than harm, should increase its military presence in Asia (53%) and has a positive influence on India (65%). In contrast, 48% of Indian respondents feel that China generally does more harm than good in the region and has a negative influence on India (46%). However, 47% also feel that ties between India and China should be stronger. Indian respondents were generally conscious of an intensification in U.S.-China competition characterising that relationship by fear (77%), and many feel that a U.S.-China conflict (40%) was more likely than a conflict in the Korean Peninsula (37%), although Indians still rated an Indian-Pakistan

conflict as more likely (55%). There was a 50-50 split with Indian respondents believing that India would be better off 'staying home' and not concerning itself with problems in other parts of the world, in contrast with China (18%) and Korea (23%). Indian respondents also have concerns about immigration and its impact on employment (42%) and culture (41%) and feel strongly that being born in India (78%), having respect for Indian institutions (77%) and 'feeling Indian' are of utmost importance (78%).

More Indonesians feel that President Trump will have a negative influence on the region (44%) than a positive influence (29%). China (58%) has overtaken the U.S. (46%) as the country with most current influence in Asia according to Indonesian respondents as well as having the most influence in 10 years' time, although respondents had a generally positive view on the influence the U.S. has on Indonesia (40%). The threat from Islamic extremism (31%) has replaced 'China's increasing economic power' (0%) as America's greatest challenge according to Indonesian respondents. The majority of Indonesian respondents (67%) believe there will be a serious military conflict between the U.S. and China. An even greater majority (73%) believe there will be a serious military conflict between the U.S. and Russia. Less than half of Indonesians surveyed (45%) also see a conflict between Indonesia and Australia as 'likely', significantly higher than Australians perception (25%) of an Australia-Indonesia conflict. Indonesian respondents feel closest to Saudi Arabia (47%) and that Malaysia is the most hostile towards them (41%). Indonesian respondents are highly concerned about the effects of immigration stealing Indonesian jobs (97%) although the notable majority (74%) do not feel Indonesia should isolate itself from problems in other parts of the world.



© Government of India 2016
President of Indonesia Joko
("Jokowi") Widodo and Prime
Minister of India Narendra Modi,
at New Delhi in 2016.

Executive Summary



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President Trump's First 100 Days – Japanese Prime Minister Shinzō Abe and Vice President Mike Pence toast at a working luncheon at the Kantei in Tokyo, Japan, April 18, 2017.

Japanese respondents perceive China and Japan to have the most influence in Asia today (42% and 41% respectively) with a significant decrease in the perception of American influence (decreased by 34% from previous survey). A greater proportion of Japanese respondents see U.S. domestic issues, particularly its domestic economy (15%), internal political division (19%) and racial/ ethnic divide (22%), as more challenging to America than China's increasing military (17%) and economic power (7%). A notable majority of Japanese respondents do not believe that China will overtake the U.S. as a superpower (78%) and Chinese investment in Japan is generally viewed negatively (71%).

South Koreans generally perceive China as having an increasingly negative influence on the region, as well as the decline of U.S. influence, especially President Trump. There has generally been a rise in anti-China sentiment in South Korea with 60% of South Koreans perceiving China as having a negative influence – a 38% increase from the previous survey. However, half of South Korean respondents (50%) felt the relationship should be strengthened and that trade with China has a positive effect (45%). South Koreans generally view foreign investment in critical infrastructure unfavourably (75%) and also hold unfavourable views about China's military expansion in the region (47%). A majority of South Korean respondents feel that the election of President Trump will negatively affect South Korea (70%) and expect the relationship between South Korea and the U.S. to be 'bad' (72%). South Koreans also think the Trump Presidency will not be helpful in addressing the situation in North Korea (72%) and most identify the development of North Korea's nuclear weapons and military provocations as the most serious threat to South Korea's national security (68%).

U.S.A. in the Indo-Pacific



The United States in the Indo-Pacific

America's role in the Indo-Pacific

Authors: **Simon Jackman**, Professor and CEO, United States Study Centre at the University of Sydney
Luke Mansillo, PhD Candidate, United States Studies Centre

The tumultuous U.S. presidential 2016 election campaign, its outcome, and the eventful start to the Trump administration set the stage for this iteration of the survey distributed in late February and early March 2017, just one month into the Trump presidency. As a candidate and in his inauguration speech, Trump promised to remake America's relationship with the world, to put "America First." As a candidate Trump argued that its allies ought to shoulder more costs of their national defense and perhaps should arm themselves with nuclear weapons. A more robust approach to China in trade and security was also a key part of Trump's agenda as a candidate. During the interregnum, Trump and Taiwanese President Tsai Ing-wen spoke by phone, sparking intense speculation as to Trump's intentions with respect to China and possible reactions from Beijing.

Shortly after taking office, and before the survey had been distributed, Trump announced that the United States was withdrawing from the Trans-Pacific Partnership. President Trump also signed executive orders that directed the U.S. Government to minimise costs and burdens stemming from the operation of the

Affordable Care Act (aka "Obamacare") and restricted entry to the United States from seven, majority Muslim nations (later blocked by the courts). On 13 February 2017, Trump's National Security Advisor Michael Flynn, resigned after acknowledging he had misled officials (including the Vice-President) about the nature of his communications with Russian diplomats, renewing controversy about possible ties between the Trump campaign and Russian attempts to influence the outcome of the 2016 U.S. presidential election.

How have these developments in the United States shaped attitudes about America's role and its influence in the Indo-Pacific and on specific countries? Have assessments of security challenges changed? Has Trump's "America First" message – backed up by America's withdrawal from the TPP – changed attitudes towards international trade and investment in the region? This survey was designed to answer those questions.

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President Trump's First 100 Days – President Donald Trump delivers his Joint Address to Congress at the U.S. Capitol Building in Washington, D.C., February 28, 2017.



The United States in the Indo-Pacific

Summary of findings

- **assessments of American influence in the Indo-Pacific have diminished**, and by large margins among American allies such as Australia, Japan and Korea. Of the six countries surveyed, Australian respondents are the most likely to nominate China as the most influential country in Asia today (72%) and the least likely to nominate the United States (11%).
- **assessments of American influence on specific countries remain positive** in all countries, except China. Australians are indifferent with respect to the value of American versus Chinese influence on Australia (continuing a pattern observed in the previous survey), while Indian, Japanese and Korean respondents give much more positive evaluation to the influence of the United States on their respective countries.
- **trade with and investment from the United States is seen as overwhelmingly positive** for all countries. Korea, Japan and India would prefer increased trade with the United States over China, while the opposite holds in Indonesia and Australia. In all countries, investment from the United States is strongly preferred over investment from China.
- **foreign investment in critical infrastructure** is welcomed in the developing countries surveyed (Indonesia, India, China), but faces more opposition than support in Japan, Korea and especially in Australia.
- **the Korean Peninsula** remains the most likely site of a militarised conflict. North Korea is thought to be the country most likely to initiate a conflict in four out of six countries surveyed. Chinese suspicions about Japanese militancy remain high, but have fallen substantially from the previous survey.
- **conflict between the U.S.-China** is generally seen as more likely now than in the previous survey, but is still seen as a relatively remote prospect in most countries. Just 10% of Chinese respondents report a US-China conflict as being "very" or "extremely" likely.
- **nationalism runs high in Indonesia and India, followed by China.** Australians report the lowest levels of nationalism among the six countries surveyed. Increasing levels of nationalism predicts a desire for stronger ties with the United States in all countries except China and Indonesia. Increasing levels of nationalism also predicts wanting stronger ties with the United States and less strong ties with China in Japan and India.
- **isolationism runs high in India and Australia.** Fifty percent of Indians and 43% of Australians agreed that "this country would be better off if we just stayed home and did not concern ourselves with problems in other parts of the world." Only 18% of Chinese accept that proposition.
- **free trade agreements are favoured in all six countries.** Korea is the most predisposed towards free trade, by a favourable-to-unfavourable margin of 56%. Australia is the least in favour of free trade, with favourable attitudes outpacing negative attitudes towards FTAs by 29%.
- **democratic forms of government are highly valued in all six countries surveyed**, but with Australia and Korea scoring especially high on this measure. Japanese respondents recorded the lowest "importance of democracy" score. The importance of democracy varied by age in Japan and Australia, with older respondents especially emphatic about democracy. The opposite pattern holds in China, with cohorts socialised during the Cultural Revolution less likely to report that democracy is important to them.

The United States in the Indo-Pacific

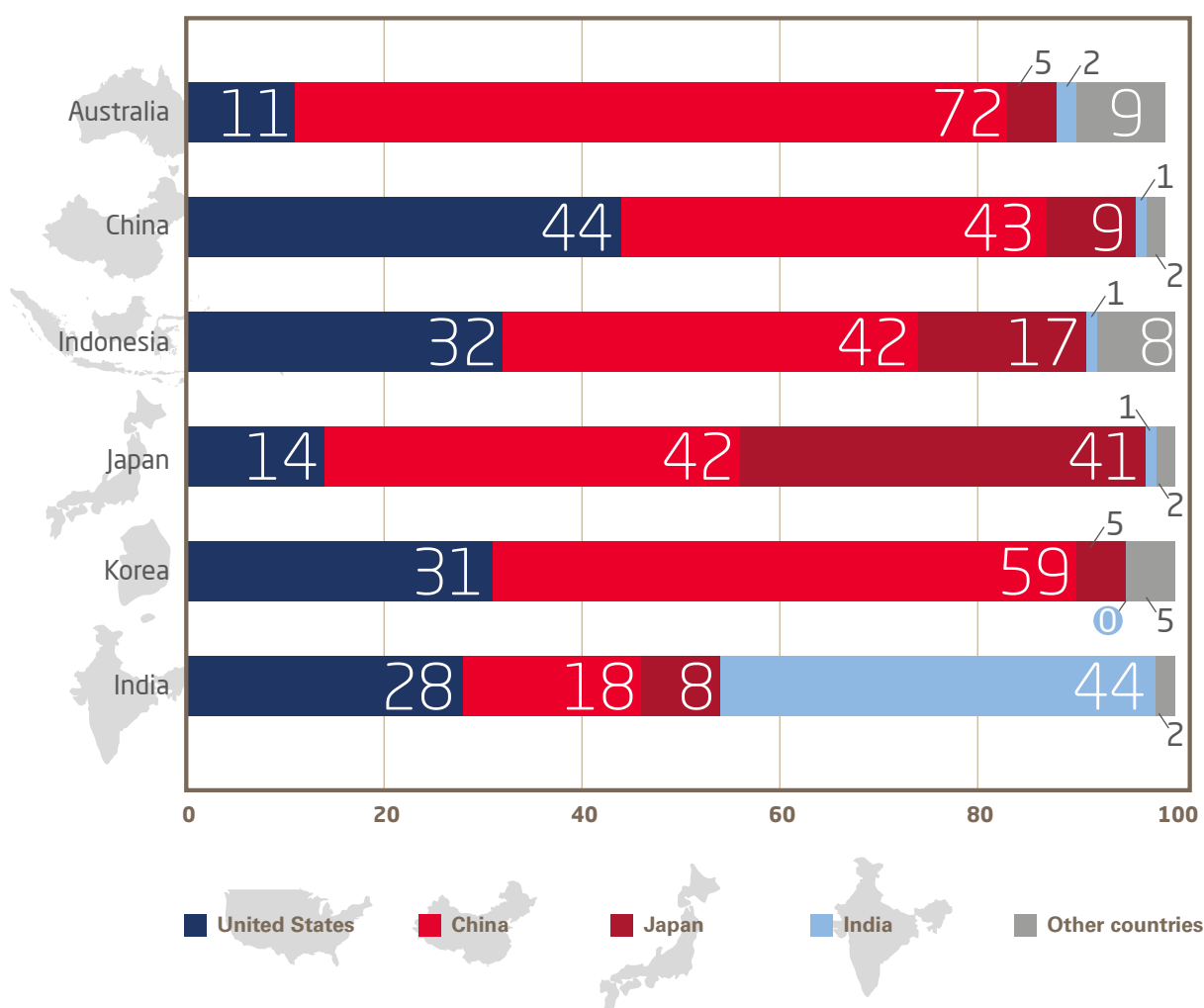
U.S. allies report diminished U.S. influence in the Indo-Pacific

Assessments of American influence in Asia have diminished in Australia, Indonesia, Japan and Korea, but not in China. The falls in Japan and Korea are especially large. In the previous survey, 48% of Japanese respondents nominated the United States as the most influential country “in Asia today”; this percentage has fallen to just 14%. In Korea, the fall is from 60% to 31% and from 22% to 11% in Australia. Assessments of China’s influence in Asia are higher in Indonesia and Korea and stable everywhere else, except in China itself (see Figure 1). Japanese

respondents are much more likely to nominate Japan as the country with the most influence in Asia than in the previous iteration of the survey. Forty four percent of Indian respondents nominated India as the country with the most influence in Asia today; just 2% of Australians shared this assessment, and even smaller percentages elsewhere.

Of the six counties surveyed, Australian respondents are the most likely to nominate China as the most influential country in Asia today (72%) and the least likely to nominate the United States (11%).

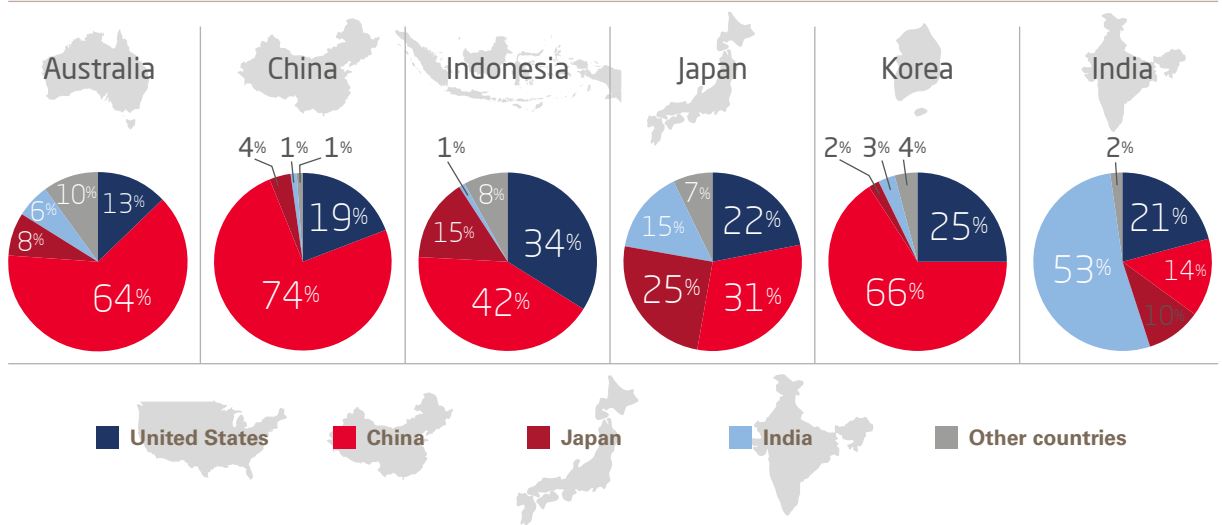
Figure 1. Which country has the most influence in Asia today?



The United States in the Indo-Pacific

There is more agreement about which country will be the most influential in Asia ten years from now (see Figure 2). China is the plurality choice in Australia (64%), China (74%), Indonesia (42%), Japan (31%) and Korea (66%), with Indian respondents rating China behind India (53%) and the United States (21%).

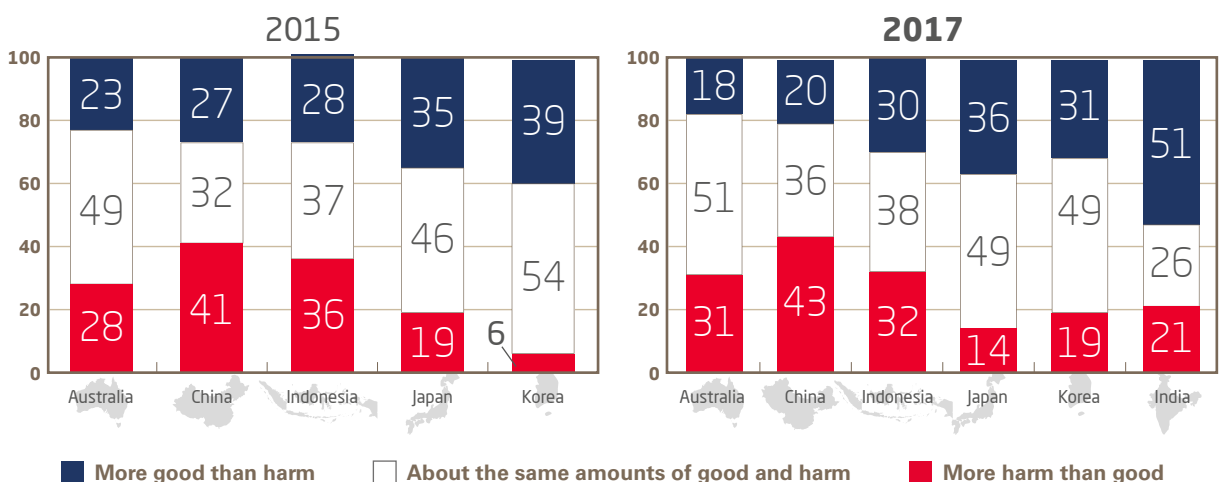
Figure 2. Which country will have the most influence in Asia in ten years?



Evaluations of America's impact on the Indo-Pacific are largely unchanged from the previous survey (see Figure 3). Japan and Korea remain especially positive in their evaluations of whether the United States 'does more good or harm' to the Indo-Pacific region, with 36% of Japanese respondents (previously 35%) and 31% of Korean respondents (previously 39%) reporting 'more good than harm'. Fifty two percent of Indian respondents see the United States as doing

more good than harm in the Indo-Pacific region, far and away the most positive assessments of the United States among the six countries surveyed. Just 20% of Chinese respondents see the United States as doing more good than harm (down from 27%), while 18% of Australians report that the United States does more good than harm in the Indo-Pacific, down from 23% in the previous survey.

Figure 3. Does the United States do more good or more harm to the Indo-Pacific region?



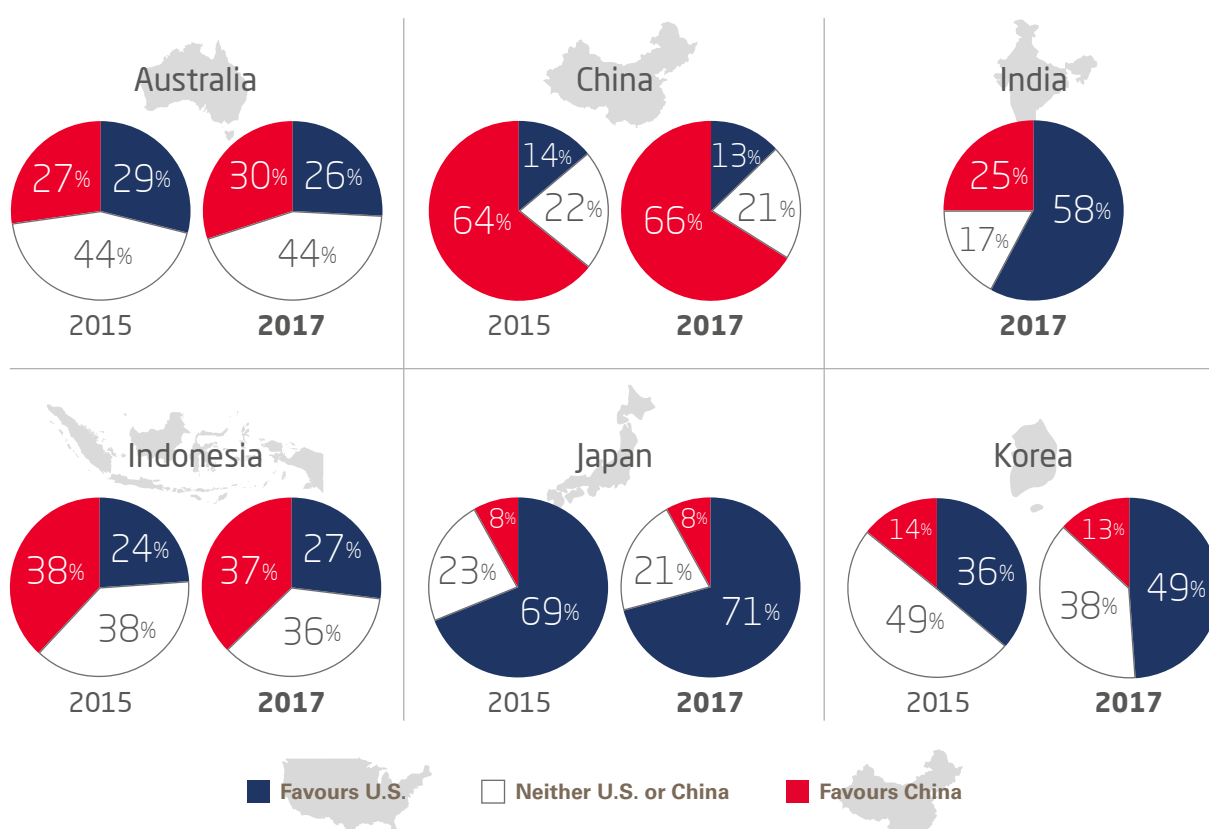
The United States in the Indo-Pacific

At the same time, Australians do not have especially favourable views of the impact of China on the Indo-Pacific. Just 21% of Australians rated China as doing more good than harm (down from 24%). Koreans and Japanese respondents have even more negative assessments of China's impact, with just 13% and 9% respectively offering positive assessments of China's impact on the Indo-Pacific while 63% of Chinese respondents rated China's impact as positive (down from 70% in the previous survey).

Australians are the most likely to offer even-handed assessments of the impact of both China and the United States (see Figure 4) with 51% of Australians saying the United States does about the same amount of good and harm to the Indo-Pacific, 50% make the same assessment of China's impact and 44% give the

same assessment of the United States as they give China. Thirty percent of Australians give more positive assessments to China than to the United States, while 26% give more positive assessments to the United States. The resulting net positive score of 4% towards China is statistically distinguishable from zero, but the smallest U.S./China differential across the six countries surveyed. Indian respondents have much more positive evaluations of the United States over China (+33%), as do the Japanese (+63%) and Koreans (+36%). Indonesians rate Chinese influence on the Indo-Pacific more positively than American influence (+10% towards China). Unsurprisingly, Chinese respondents are the most positive about China's influence on the Indo-Pacific, with a net positive score for Chinese influence over U.S. influence of 53%.

Figure 4. Percentages of respondents rating the United States or China more favourably on good or harm in the Indo-Pacific region



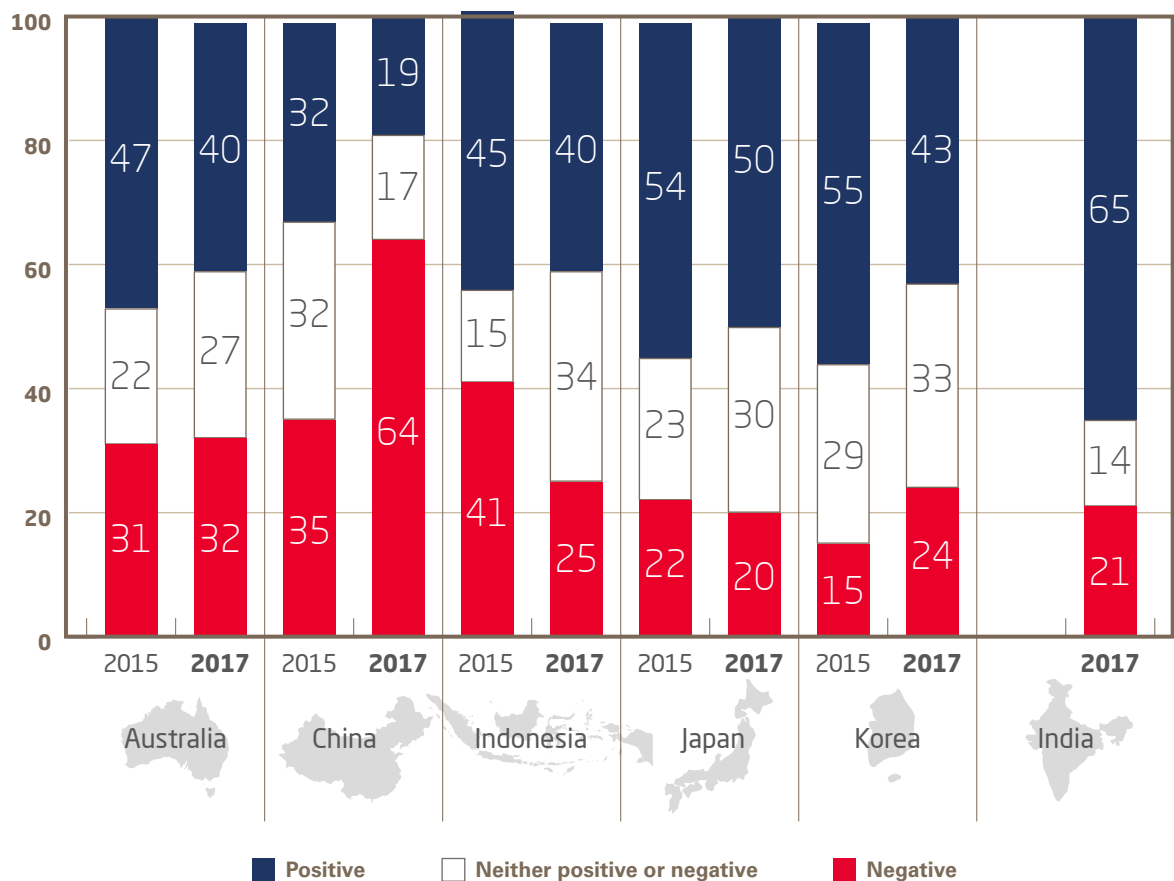
The United States in the Indo-Pacific

Does the United States have a positive influence on specific countries?

Respondents were asked if the United States had a positive or negative influence on their country, (see Figure 5). Positive assessments outnumbered negative assessments in Australia (+8), India (+44), Indonesia (+15), Japan (+30) and Korea (+19); only in China are negative assessments of U.S. influence more

prevalent than positive assessments (-45). Evaluations of American influence have become less sanguine in Australia since the previous survey (+16 to +8), as well as in China (-3 to -45) and Korea (+40 to +19), with Japanese assessments unchanged (+32 to +30).

Figure 5. Does the United States have a positive or negative influence on the respondent's country?

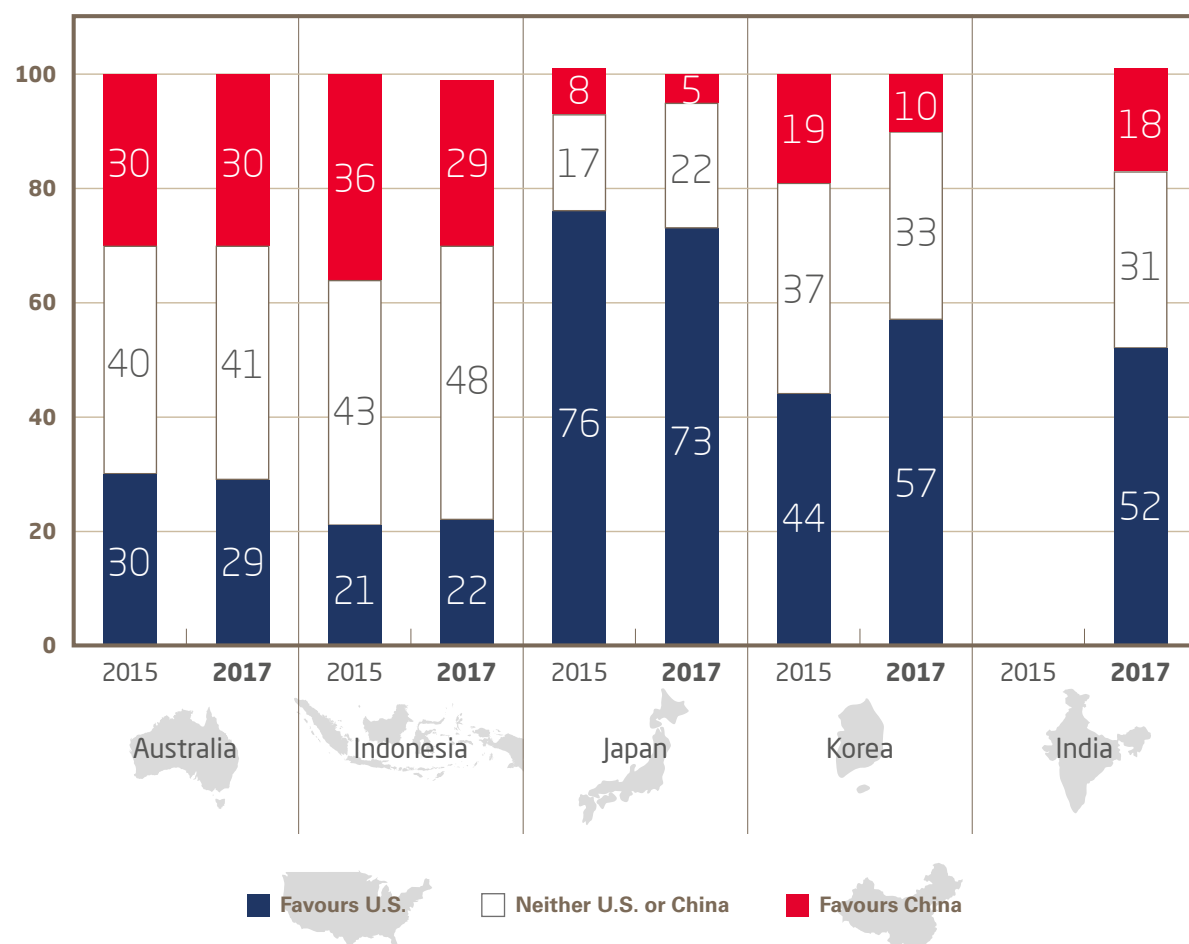


The United States in the Indo-Pacific

Figure 6 displays the proportions of respondents giving either the United States or China more favourable assessments with respect to the influence of those countries on their home country. This comparison is not meaningful for Chinese respondents. Australian responses are indistinguishable from their responses in the previous survey, with 4 in 10 Australians giving the same rating to both China and the United States. Roughly equal proportions of Australians rated the United States over China and vice-versa.

Indonesian respondents displayed a slight tendency to evaluate China's influence more favourably than that of the United States, 29% to 22% for a net positive towards China of 7%, down from a 14% net positive rating in the previous survey. Other countries surveyed all reported much more favourable evaluations of the influence of the United States relative to their evaluations of China. In Japan the net positive score in favour of the United States was 68% (67% in the previous survey). In Korea this figure was 47% (previously 25%) and in India was 34%.

Figure 6. Percentage of respondents rating the United States or China more favourably on influence on country



The United States in the Indo-Pacific

Trade with the United States

Increasing trade with the United States is generally perceived as a good thing in every country surveyed (Figure 7), with very little change from the previous survey. Fifty percent of Australians (previously 57%) have a positive view of increased trade with the United States while 71% of Chinese respondents (previously 70%) hold this view, as do 43% of Indonesians (no change), 42% of Japanese (previously 51%) and 48% of Koreans (previously 55%). Seventy percent of Indians report a positive view of increasing trade with the United States (see Figure 7).

Figure 7. Is increasing trade with the United States good, bad or neither good nor bad for the respondent's country?

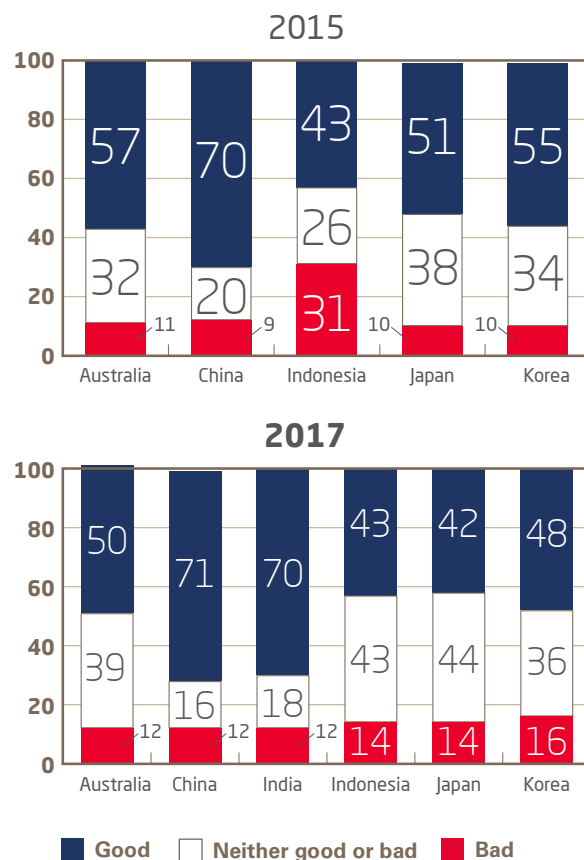


Figure 8. Percentage of respondents with a more favourable view of increased trade with the United States or with China.

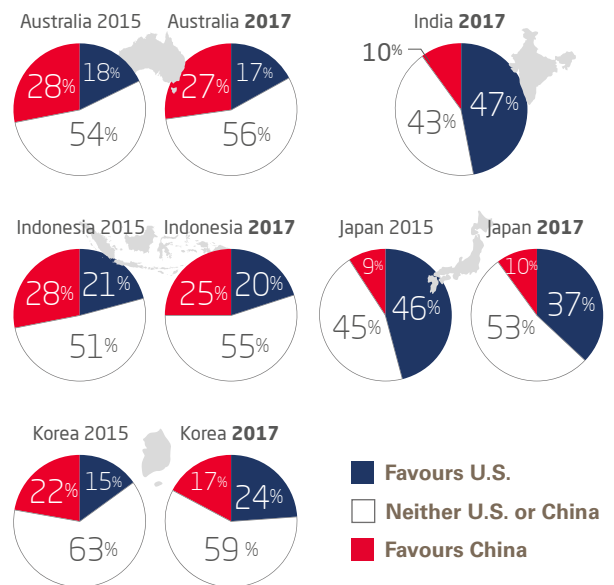


Figure 8 contrasts preferences for increased trade with the United States with China. Twenty seven percent of Australians are more positive about increasing trade with United States than with China, while 17% hold the contrary views, for a net positive towards increased trade with China of 10% (unchanged from the previous survey). Indonesians also have a slight tendency to report more positive views about trade with China than with the United States, a net positive towards China of 5%. In Japan, Korea and India, there is a clear preference for increasing trade with the United States over China, with net positive ratings of 27% in Japan (down from 35% in the previous survey), 7% in Korea (a swing from a 7% net positive towards China over the United States in the previous survey) and a large 37% net positive towards the United States in India (see Figure 7).

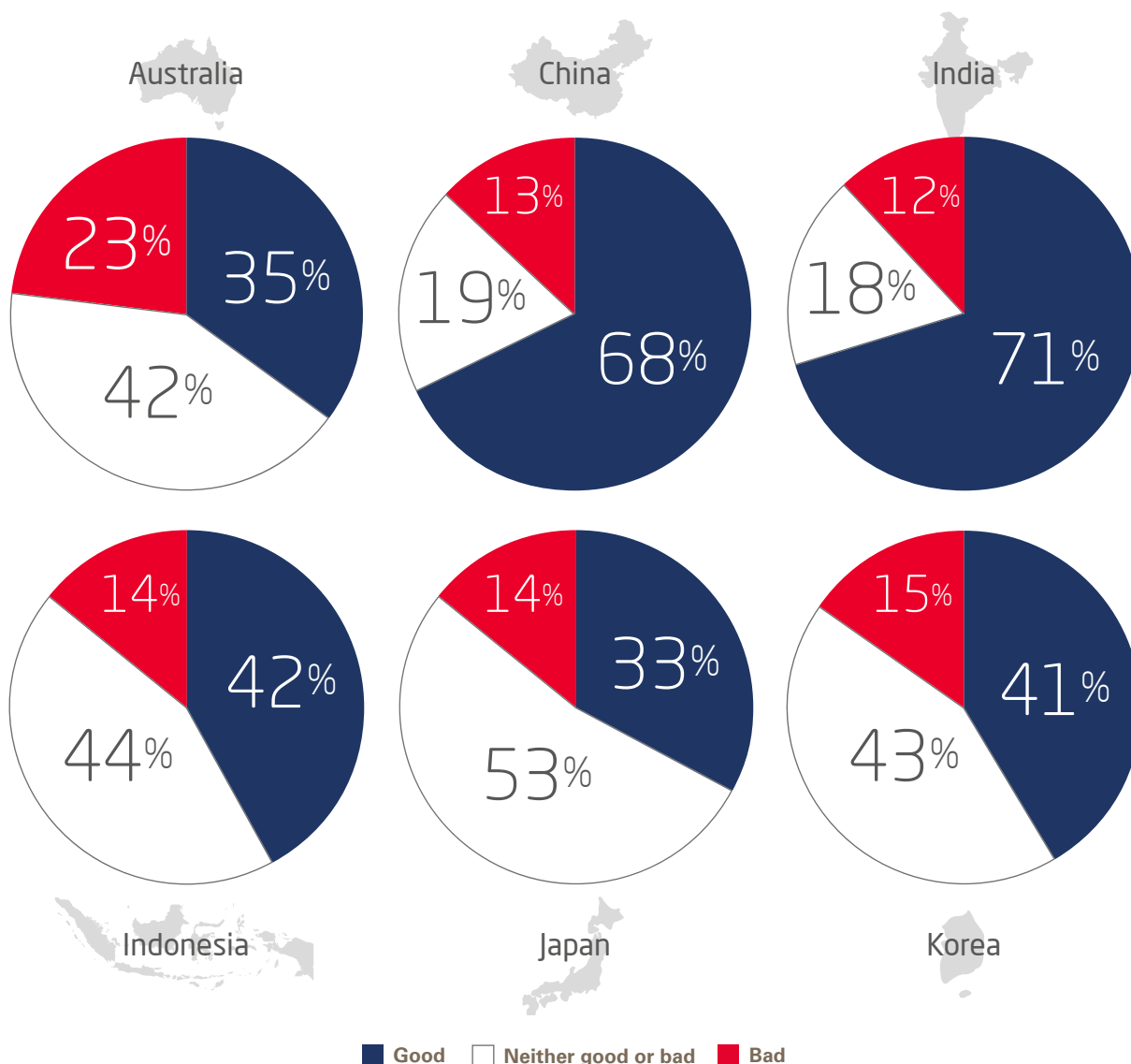
The United States in the Indo-Pacific

Investment from the United States

Respondents were asked a similar set of questions about investment from the United States; questions that were not asked in the previous survey. Figure 9 displays these results with 23% of Australians reporting that investment from the United States is either bad or very bad for Australia, the highest proportion of negative assessments among the six countries surveyed; the corresponding percentages

are 13% in China, 12% in India, 14% in Indonesia and Japan and 15% in Korea. Positive assessments of U.S. investment tended to outweigh negative assessments, with 68% of Chinese respondents reporting that investment from the United States is either good or very good for China; the corresponding percentages are 71% in India, 42% in Indonesia, 41% in Korea, 35% in Australia and 33% in Japan.

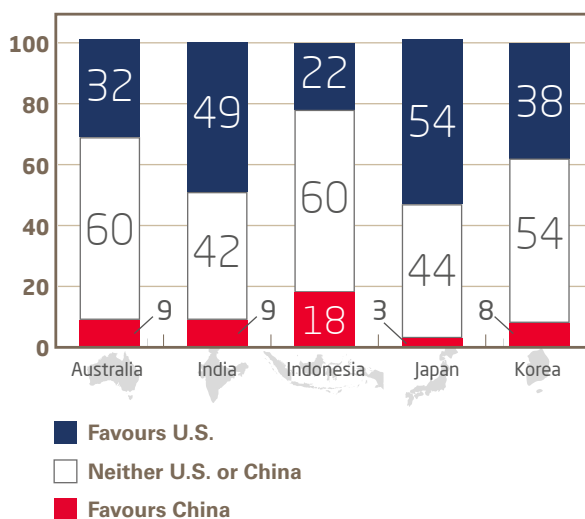
Figure 9. Is investment from the United States good, bad or neither good nor bad for the respondent's country? (figures have been rounded)



The United States in the Indo-Pacific

Not only is investment from the United States generally seen as desirable, it is also generally seen as more desirable than investment from China. Thirty two percent of Australians expressed more positive sentiment towards investment from the United States than from China, with just 9% holding the contrary view for a net positive of 23% towards the United States. Net positive scores for U.S.-sourced investment over investment from China ranged from 51% in Japan and 40% in India, to just 4% in Indonesia.

Figure 10. Percentage of respondents with a more favourable view of investment from the United States or investment from China.



Security challenges

Respondents were asked questions about the likelihood of various interstate conflicts that could arise in the region, as well as to nominate which country might be most likely to initiate conflict.

Concern over North Korea

Figure 11 summarises responses about which country is likely to start a conflict in the Asia Pacific. In four out of six countries, North Korea remains the most likely belligerent, at rates that vary from 59% in Japan, to 31% in Indonesia. The exceptions are China, where Japan remains the country thought to be the most likely to start a conflict (24%, but sharply down from 56% in the previous survey), and India, where 35% reported that China is most likely to start a conflict.

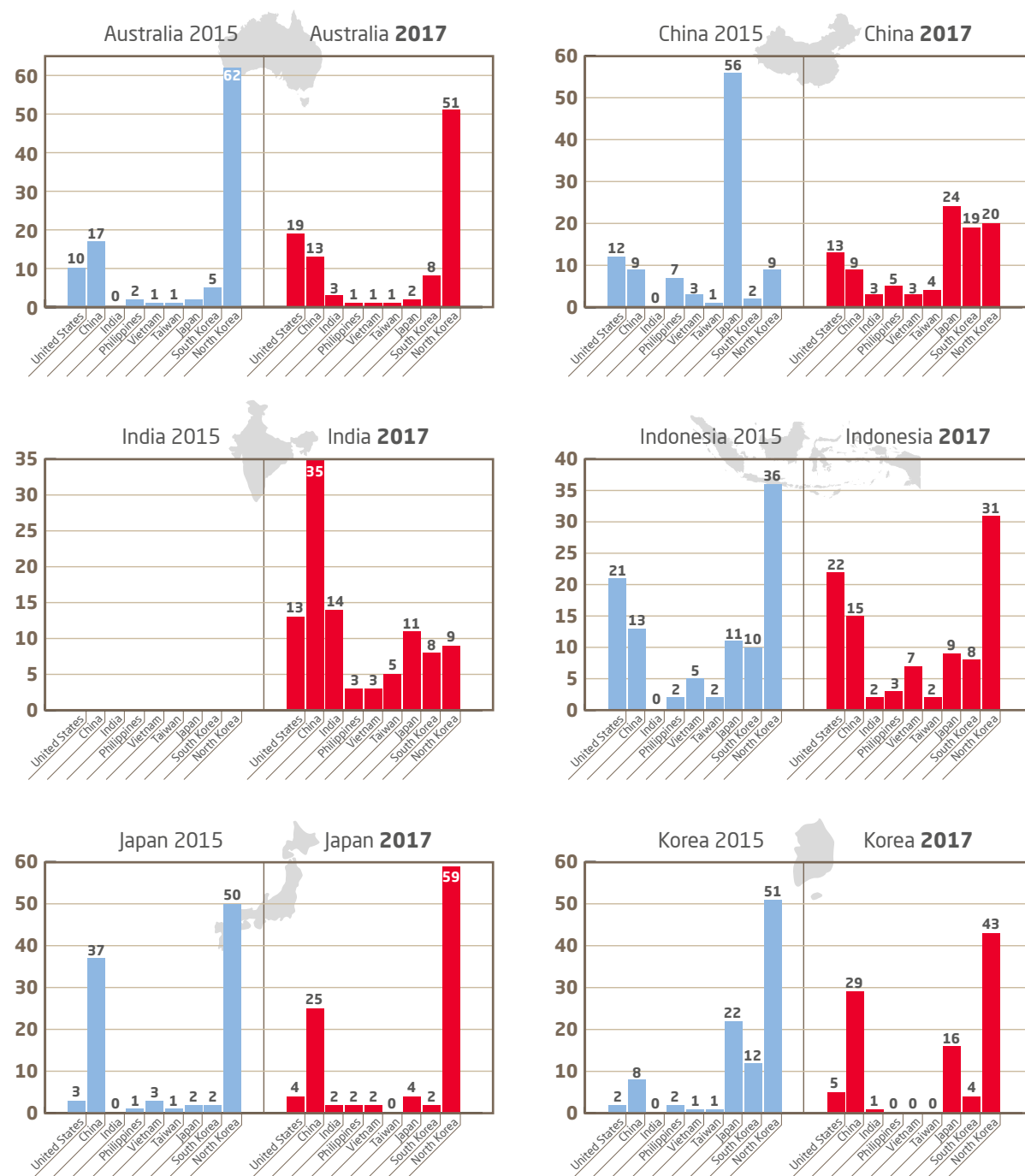
After North Korea, China is perceived to be the next country most likely to start an interstate conflict. After the 35% of Indians who rated China most likely to start a conflict, 29% of South Koreans also nominated China (up from 8% in the previous survey), as did 25% of Japanese respondents (down from 37% in the previous survey). Fifteen percent of Indonesians and 13% of Australians nominated China as most likely to start a conflict in the Indo-Pacific.

Heightened fears about conflict on the Korean Peninsula have helped reduce the rate at which respondents see Japan as initiating conflict. In the previous survey 56% of Chinese respondents nominated Japan as most likely to start the next regional conflict; this has more than halved to 24%. Similarly, only 16% of South Koreans nominated Japan as most likely to initiate conflict, down from 22% in the previous survey.

There is very little movement in the rate at which respondents nominate the United States as the country most likely to initiate conflict in the Indo-Pacific with rates ranging from 4% in Japan to 22% in Indonesia. Australia is the only country with a significant increase in the rate at which the United States was selected: 19% versus 10% in the previous survey. More Australians think the United States is the country most likely to initiate an Asian-Pacific conflict than China (19% to 13%), a reversal of the results in the previous survey. Indeed, Australians nominated the United States as the initiator of conflict at higher rates than the Chinese (13%), Indians (13%), Japanese (4%) or Koreans (5%).

The United States in the Indo-Pacific

Figure 11. Over the next ten years, which of the following is the most likely to start a conflict in the Indo-Pacific region?



The United States in the Indo-Pacific

Specific interstate conflicts

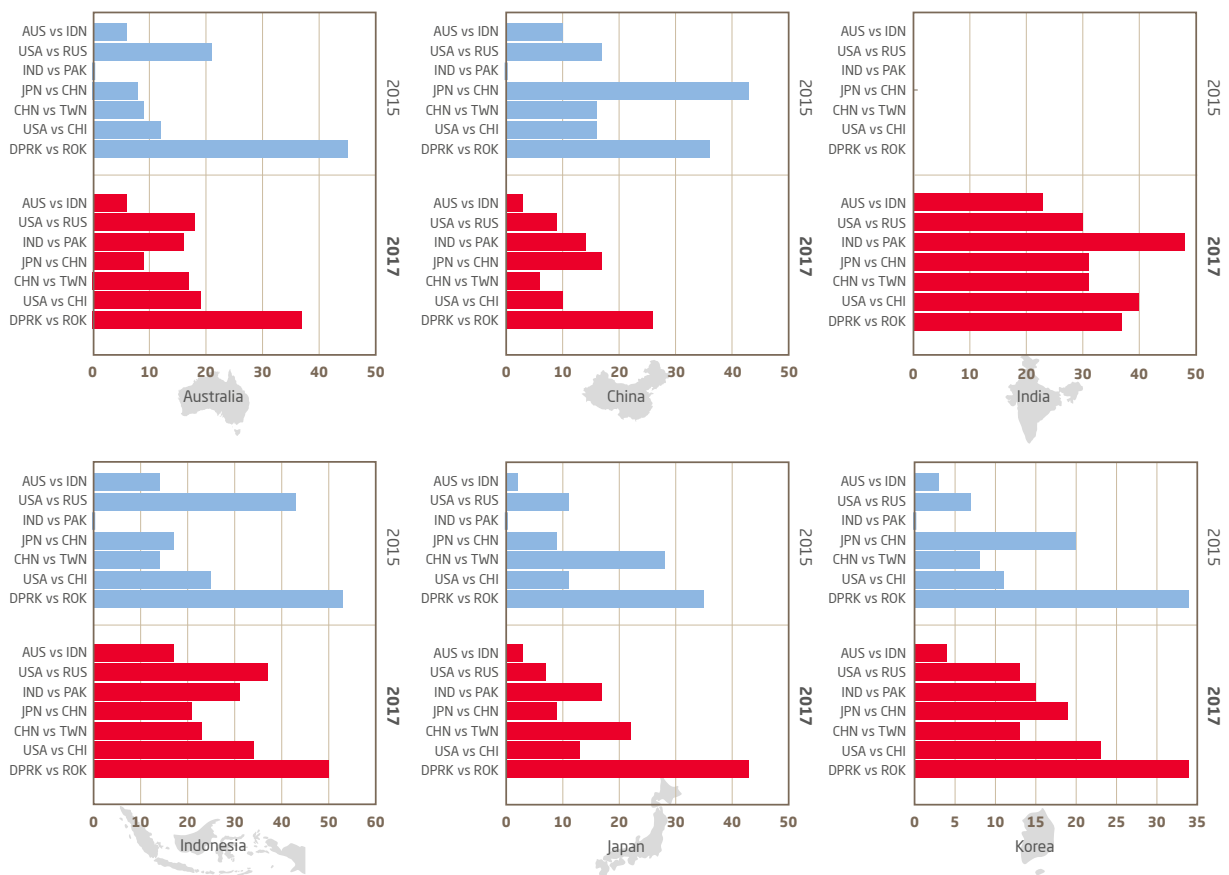
Respondents were asked about the likelihood of seven specific conflicts: (1) between North and South Korea; (2) Japan and China; (3) the United States and Russia; (4) China and Taiwan; (5) the United States and China; (6) Australian and Indonesia; and (7) India and Pakistan. Figure 12 summarises the responses, presenting the percentage of respondents assessing each conflict to be “very likely” or “extremely likely,” by year and country of respondent. Note that respondents were not asked about a possible India-Pakistan conflict in the previous survey.

Again, a North and South Korea conflict is thought to be the most likely of the seven hypothetical conflicts presented to respondents in five out of six countries. Half of Indonesian respondents rated a DPRK-ROK conflict as “very” or “extremely” likely; a quarter of

Chinese respondents made that assessment. Yet, with the exception of Japanese respondents, the likelihood of a Korean conflict is generally seen as unchanged or slightly lower than in the previous survey. Assessment was unchanged in South Korea, with 34% reporting that conflict with the North is very or extremely likely.

In China, there was a sharp decline in the proportion of people who believe that a conflict would emerge between China and Japan. In 2017, 17% of Chinese respondents thought a conflict with Japan was very or extremely likely. This is a 26% decline from our previous survey, in which 43% of Chinese respondents assessed a conflict with Japan as very or extremely likely. There were no other significant shifts in views in the other countries studied.

Figure 12. Likelihood of specific conflicts, percentages assessing a given conflict as “extremely likely” or “very likely”



The United States in the Indo-Pacific

A more belligerent United States?

In most of the countries surveyed the results show a greater likelihood attached to a U.S.-China conflict than in the previous survey. In Australia, the percentage of respondents assessing this conflict as very or extremely likely increased from 12% to 19%; in Indonesia the increase is from 25% to 34%; in Korea the increase is from 11% to 23%; in Japan the increase is small and not statistically significant, from 11% to 13%. Indian respondents attached the highest likelihood to a U.S.-China conflict with 40% rating it as very or extremely likely. Chinese respondents attached the lowest likelihood to a US-China conflict, with just 10% assessing it as very or extremely likely, down from 16% in the previous survey.

A U.S.-Russia conflict is generally seen as less likely than in the previous survey, according to respondents in Australia, China, Indonesia and Japan while 13% of Koreans say that a U.S.-Russia conflict is very or extremely likely, up from 7% in the previous survey. Indonesians believe a U.S.-Russia conflict is more likely than a U.S.-China conflict (37% versus 34%) or a India-Pakistan conflict (31%) and second only to a Korean conflict (50% reporting very or extremely likely).

Assessing a China-Taiwan conflict

A serious military conflict between China and Taiwan is considered more likely in Australia, Indonesia and Korea in 2017 compared to the previous survey, but the reverse is true in China and Japan. Seventeen percent of Australian respondents (up from 9%), 23% of Indonesians (up from 14%) and 13% of Koreans (up from 8%) all report that a conflict between China and Taiwan is very or extremely likely. Conversely, there was a 10% decline in China with just 6% of respondents assessing a China-Taiwan conflict as very or extremely likely. Thirty one percent of Indian respondents think a China-Taiwan conflict is very or extremely likely, the highest rate among the six countries surveyed. Chinese assessments of the likelihood of this conflict differed markedly from those in all other countries: while just 6% of Chinese rated this conflict as very or extremely likely, the corresponding rates elsewhere are two to five times higher.

The low likelihood of an Australia-Indonesia conflict

An Australian-Indonesian conflict is considered the least likely of the seven conflicts respondents were asked about. There has been little change on views towards the likelihood of a conflict between Australia and Indonesia since the previous survey. Just 3% of Chinese respondents considered this conflict as very or extremely likely, down from 10% while 3% of Japanese respondents and 4% of Korean respondents assessed an Australian-Indonesian conflict as very or extremely likely.

Australian and Indonesian respondents' assessments of a conflict between the two countries are also low, but highly asymmetric. Just 6% of Australians but 17% of Indonesians say that a conflict is very or extremely likely; the Indonesian result is almost three times that of the Australian figure, but still the least likely conflict according to both Australian and Indonesian respondents.

India-Pakistan

The 2017 survey included an item asking about conflict between India and Pakistan, reflecting the inclusion of India as one of the countries surveyed. Indian respondents see an India-Pakistan conflict as the most likely of the seven conflicts nominated, with 48% of respondents assessing conflict as very or extremely likely. Thirty one percent of Indonesian respondents also made this assessment, but fewer than 20% of other countries' respondents did. While Indians see an India-Pakistan conflict as the most likely of the seven, an India-Pakistan conflict ranked fourth in Australia and Korea and third in China, Indonesia and Japan.

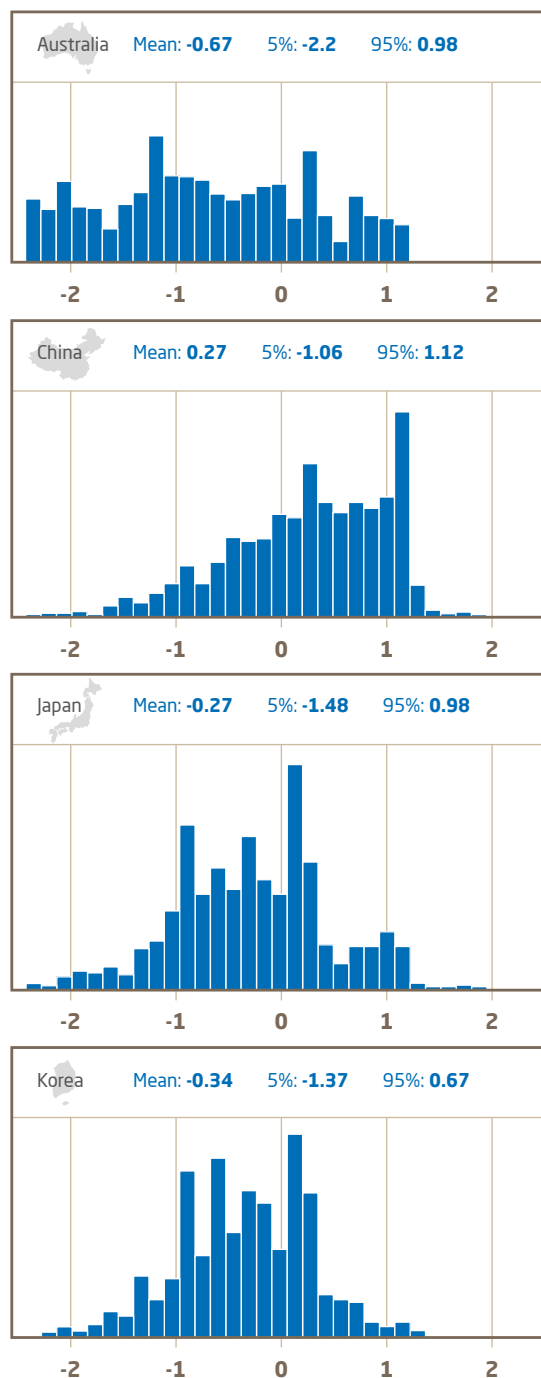
Both Indian and Indonesian respondents are more likely to believe a serious military conflict would escalate between India and Pakistan than the other countries surveyed; 48% of Indian respondents and 32% of Indonesian respondents believe conflict is likely. In contrast, far fewer Australians, 17%, Chinese, 14%, Japanese, 17%, and South Koreans, 15%, believe that conflict is likely on the subcontinent.

The United States in the Indo-Pacific

Nationalism and isolationism

The 2017 survey included measures of nationalism and isolationism used widely in the social sciences.

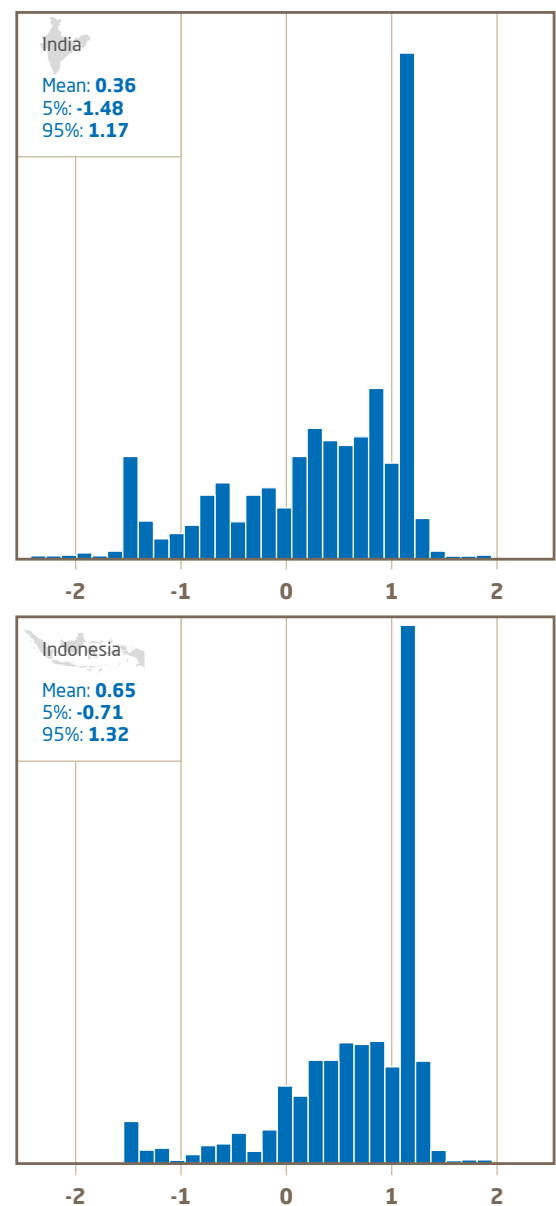
Figure 13. Distribution of nationalism scores, by country



Nationalism is measured using a scale constructed from responses to the following seven items.

Each item has four response options, ranging from very important to not at all important.

Factor analysis of these seven items suggests a two factor solution, corresponding to an "ethnic



Nationalism Score

The 5% and 95% are quartiles. The 5% represents the ethno-nationalism level of those with lowest 5% of the distribution on the scale. The 95% represents the ethno-nationalism level of those with the highest 5% of the distribution on the scale.

The United States in the Indo-Pacific

nationalism" and a "civic nationalism." A score was derived for each respondent on the "ethnic nationalism" dimension, dominated by responses to the items about country of birth, ancestry, residence and religion. The resulting scale measure was normalised to have mean zero and standard deviation one; negative scores correspond to relatively low levels of nationalism, conversely for positive scores. The factor analysis pooled the data across the six countries surveyed, ensuring that the nationalism scale measure is comparable across all countries.

Figure 13 displays the distribution of nationalism scores by country. Indonesia has the highest nationalism scores, followed by India; both countries have a large spike in the distribution of nationalism scores at the high end, driven by the fact that a large proportion of respondents in Indonesia and India gave extremely nationalistic responses to the underlying survey items (country of birth ancestry, residence, language, religion). China is the third most nationalistic country in the data with an average nationalism score of .27. Japan, Korea and Australia have average nationalism

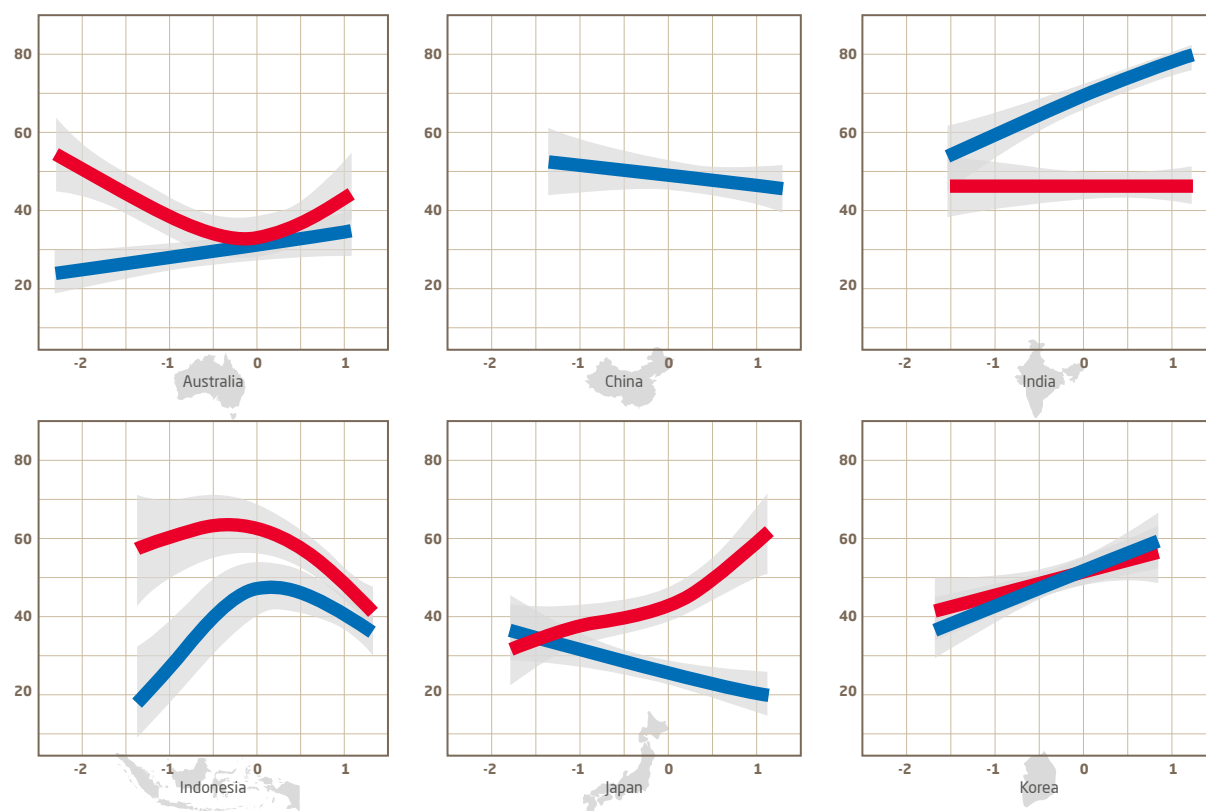
scores of -.27, -.34, and -.67, respectively. Not only does Australia have the lowest levels of nationalism, there is virtually no one in the Australian data reporting nationalist attitudes with the same ardency and consistency seen in the "spikes" in the Indonesian, Indian or Chinese data.

Nationalism and support for engagement with the United States and China

Nationalism is related to other important political attitudes and policy preferences in many interesting ways. Figure 14 displays the association between wanting a closer relationship with either the United States (blue line) or China (red line) and nationalism (horizontal axis). In every country except China and Indonesia, higher levels of nationalism predict a desire for a stronger relationship with the United States.

The relationship between nationalism and the desire for stronger relations with China is more complicated.

Figure 14. Percentage of respondents wanting stronger relationships with the United States (blue) and China (red), by nationalism score



The United States in the Indo-Pacific

In Japan and Indonesia, increasing levels of nationalism predict less desire for closer ties with China. In Japan this pattern is virtually the mirror-image of the relationship with respect to the United States: high levels of nationalism predict a strong desire for closer ties between Japan and the United States, but falling levels of support for closer ties between Japan and China. In Indonesia, as nationalism increases, the desire for stronger ties with either the United States or China tends to fall, with a marked preference for stronger ties with China over stronger ties with the United States among Indonesian respondents scoring low on nationalism.

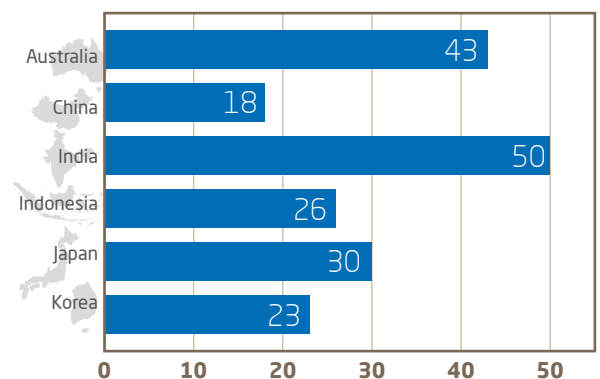
Nationalism predicts a desire for stronger ties with both China and the United States in Korea, but not in India, where nationalism is unrelated to a desire for stronger ties with China. Among Australian respondents with low levels of nationalism, a majority report wanting stronger ties with China, but just one quarter report wanting stronger ties with the United States. Increasing rates of nationalism see less enthusiasm for closer ties with China among Australians, such that at median-to-high levels of nationalism in Australia there are only small and statistical differences between rates of wanting closer ties with China and with the United States.

In summary, low levels of nationalism see a divergence between preferences for closer ties with the United States and China in Australia and Indonesia: in both countries, low levels of nationalism are associated with a preference for stronger ties with China over the United States. In India and Japan, this pattern is reversed: high levels of nationalism are associated with a clear preference for stronger ties with the United States than with China.

Isolationism

Isolationism was measured by asking respondents if they agreed or disagreed with the proposition "This country would be better off if we just stayed home and did not concern ourselves with problems in other parts of the world." Results are presented in Figure 15. Australia and India are the most isolationist countries of those surveyed, with 43% of Australians and half of Indians agreeing with the proposition. Isolationist sentiment runs low in the other four countries. Just 18% of Chinese respondents agree with the isolationist proposition. Korea, Japan and Indonesia are intermediate cases, with 23%, 30% and 26% respectively of respondents in those countries reporting agreement with the isolationist proposition.

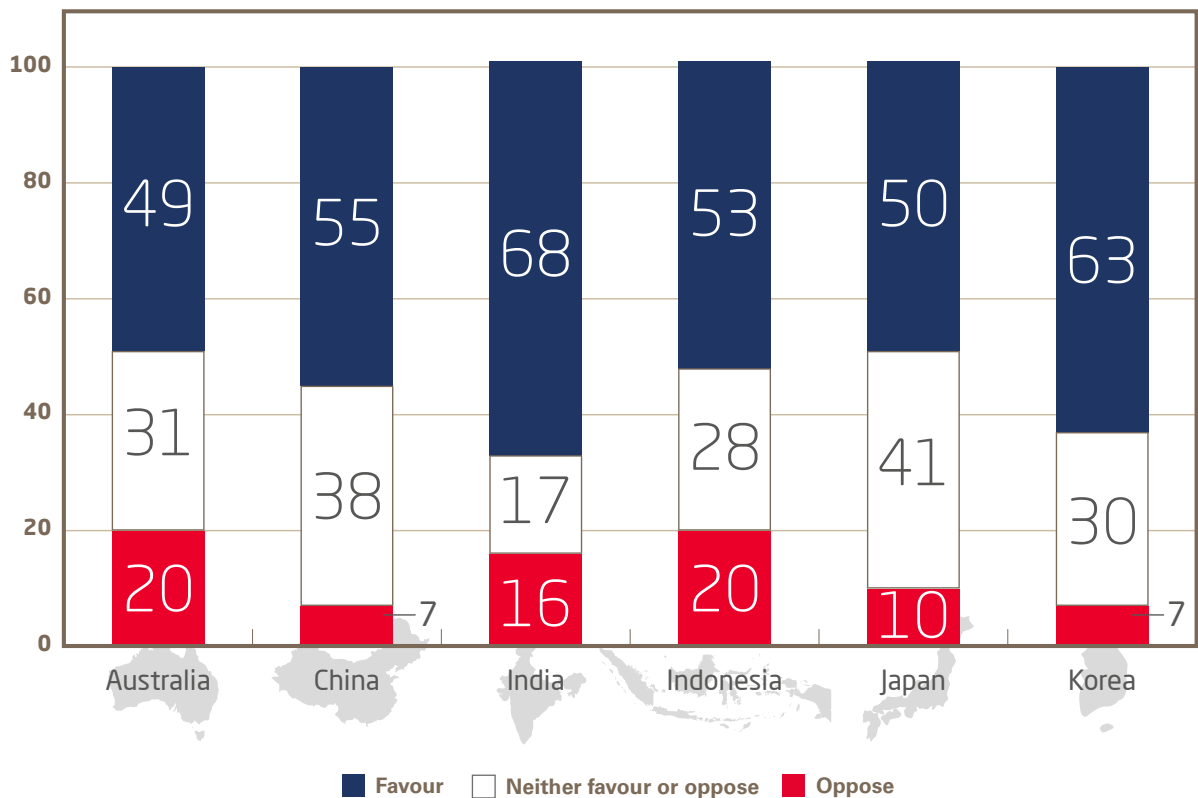
Figure 15. Percentage of respondents agreeing that "This country would be better off if we just stayed home and did not concern ourselves with problems in other parts of the world"



The United States in the Indo-Pacific

Free trade agreements

Figure 16. Attitudes towards free trade



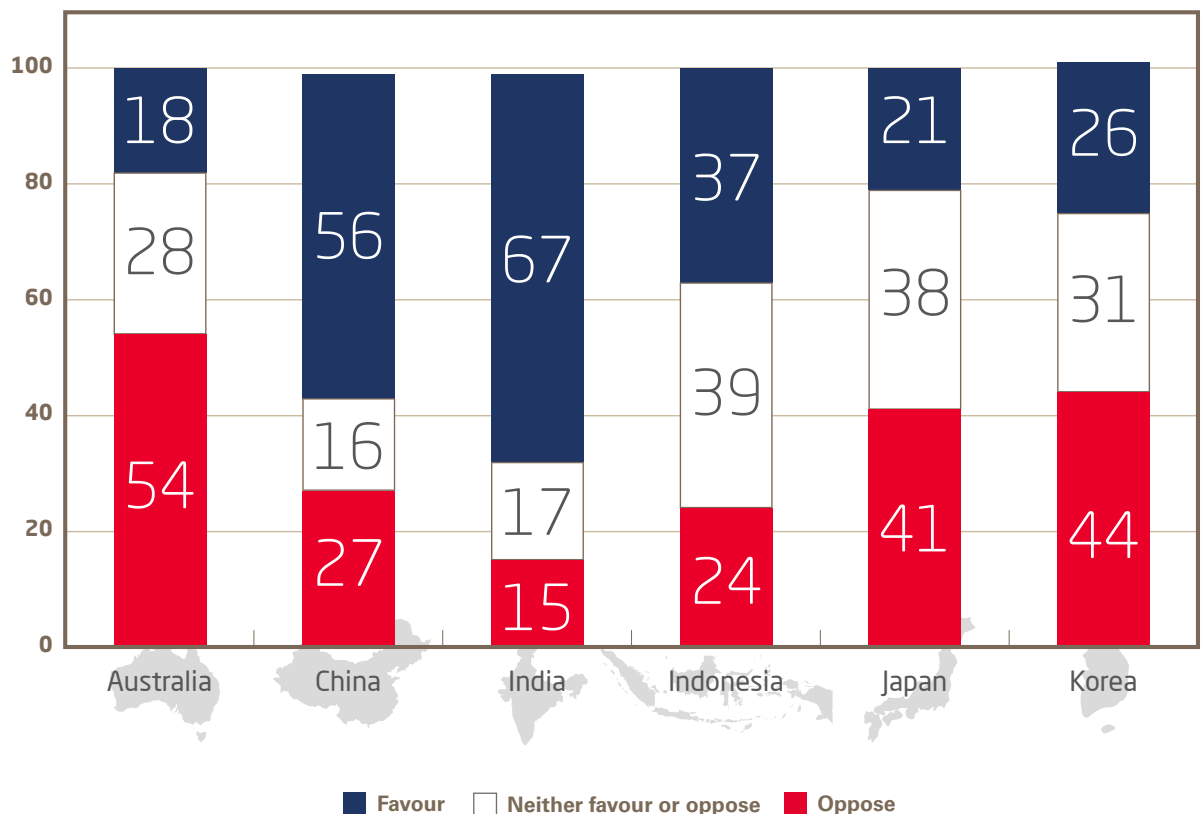
Attitudes towards free trade are summarised in Figure 16. Favourable attitudes prevail in all countries surveyed. Korea is the country most predisposed towards free trade, with 63% of respondents favouring free trade and just 7% opposing, for a net positive score of 56%. India, China and Japan follow, with net

positive scores of 52%, 48% and 40% respectively. Australians are the least predisposed towards free trade, with a net positive score of 29%. Twenty percent of Australian and Indonesian respondents reported opposing free trade agreements, the highest rates of opposition observed.

The United States in the Indo-Pacific

Foreign investment in infrastructure

Figure 17. If the government allows foreign investment in enterprises that deliver important services in [country], such as electricity, water, transport, communications, is it ...



Respondents were asked about attitudes towards foreign investment in infrastructure; specifically, "foreign investment in enterprises that deliver important services in [country], such as electricity, water, transport, communications." Responses are summarised in Figure 17. India is the country most predisposed to foreign investment in infrastructure, with 67% of its respondents approving and just 15% disapproving, for a net positive score of 52%. China and Indonesia are also positively disposed towards

foreign investment in infrastructure, with net positive scores of 29 and 13% respectively. Korea, Japan and Australia are negatively disposed towards foreign investment in infrastructure, with net negative scores of -18, -20 and -36, respectively. Australian opposition to foreign investment in infrastructure is especially pronounced, with 54% of Australians reporting that this type of investment is bad (32%) or very bad (22%) for Australia, the highest rates of opposition across the countries surveyed.

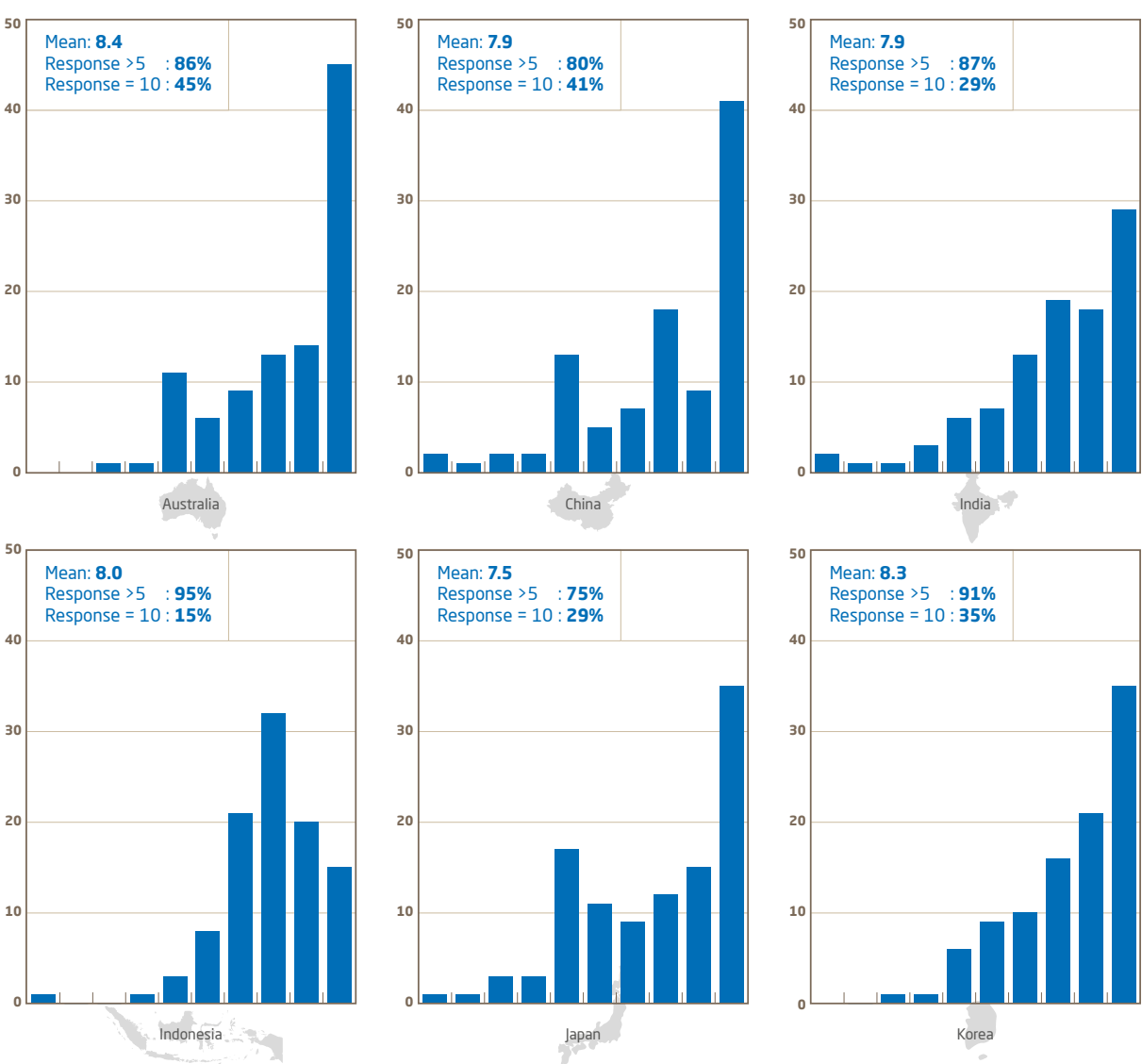
The United States in the Indo-Pacific

Importance of democracy

Respondents were asked “how important is it for you to live in a country that is governed democratically?” Responses are on a 10-point scale, mirroring an item asked on the World Values Survey and other international survey projects. Figure 18 displays the distribution of responses by country. Responses tend to cluster around the high end of the scale in almost every country except Indonesia, where a score of 8 is the most common response. Australians have both the

highest average score (8.4) and the highest propensity to give the maximum score of 10 (45%) while 41% of Chinese respondents responded with a score of 10, the second highest rate among the countries surveyed. China’s average score of 7.9 is the same as India’s average score and higher than Japan’s average score of 7.5 with 25% of Japanese respondents answering with 5 or lower, and Japan’s average score at 7.5 being the lowest of the countries surveyed.

Figure 18. Distribution of responses, “How important is it for you to live in a country that is governed democratically?”



The > 5 (greater than 5) is the proportion that respondent with a 6, 7, 8, 9 or 10 on the scale from 1 to 10. The 10 is the proportion that responded with a 10, the highest value, on the 1 to 10 scale.

The United States in the Indo-Pacific

Figure 19. Average rating of importance of living in a country governed democratic country, smoothed by age

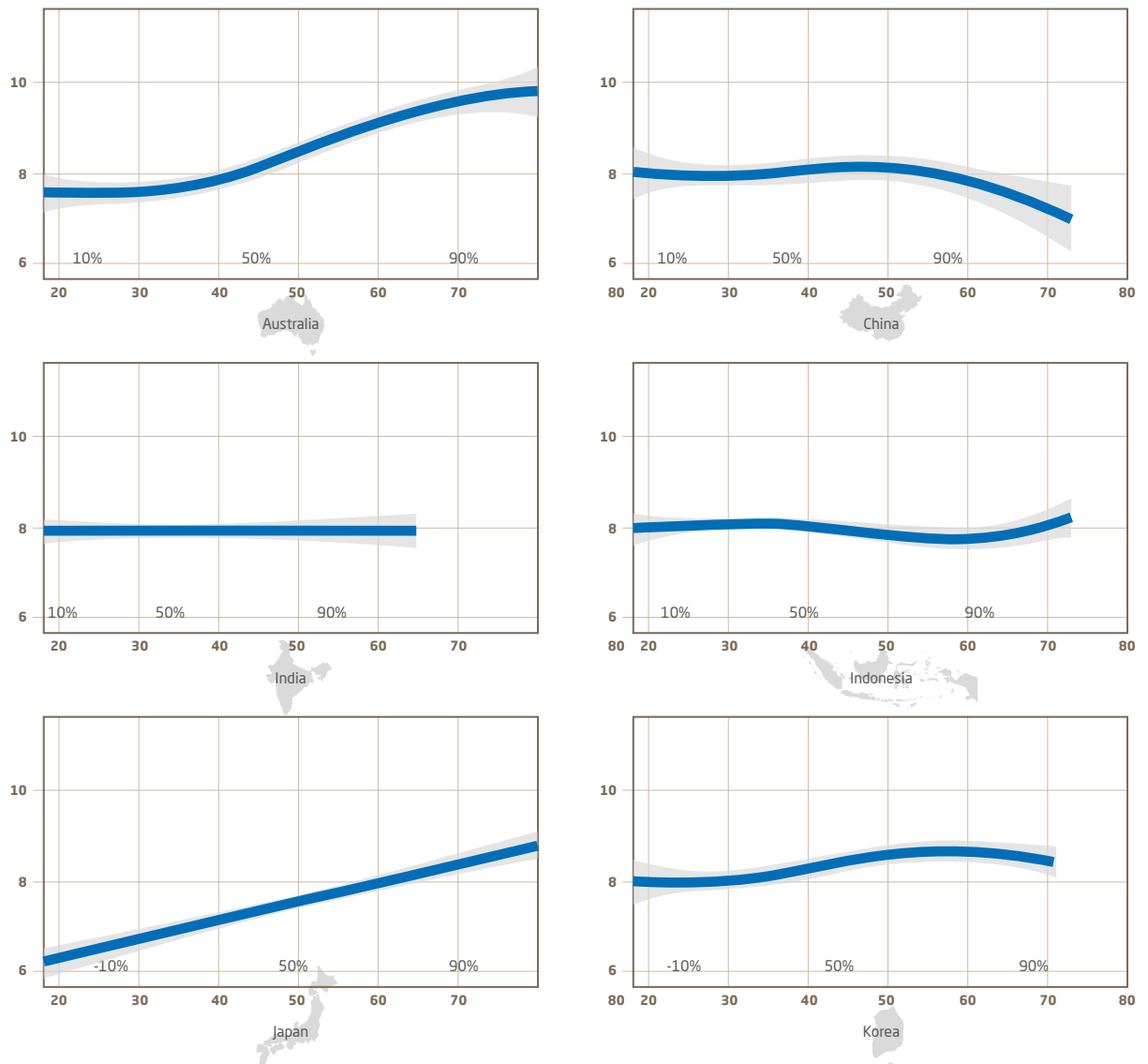


Figure 19 displays the average rating given to the importance of living in a country governed democratically, smoothed by age. There is no meaningful relationship between age and support for the importance of democracy in India, Indonesia and Korea, but there is a pronounced age gradient in Australia and Japan, with younger respondents much less likely to report democracy being important than their older compatriots. There is a two-point movement over the age distribution in both Australia and Japan. Older Chinese respondents are less likely

to report democratic governance as being important, with about a one point shift across age cohorts aged 50 to 75 (those old enough to remember the Cultural Revolution), but no meaningful variation below the age of 50. Interestingly, Australians under the age of 40 report the same importance of democracy as do all other countries, including China, but not Japan. The high, overall, average ratings for democracy reported by Australians are largely driven by the near-universally high importance of democracy reported by older Australians.

Australia



Australia

Authors: **James Brown**, Research Director and Adjunct Associate Professor, United States Studies Centre at the University of Sydney

Kim Beazley, Director and Distinguished Fellow, Perth USAsia Centre at The University of Western Australia

Introduction

This survey is the first to substantially stress test the Australian public's thinking on the American alliance and its interaction with the geopolitics of our region since the election of the Trump administration. It is essentially a measure of the effect of Trump's campaign and the very early days of his administration, given it went to field in February this year. At that point, the Trump campaign's scepticism of traditional United States alliances in Asia was making way for reassuring remarks from Secretaries Mattis and Tillerson, hewing U.S. foreign policy towards a more establishment perspective. The testy first contact between President Trump and Prime Minister Turnbull, and indeed the affectionate commemorations and alliance endorsements of the Coral Sea anniversary dinner on board USS Intrepid in New York, both occurred after this survey polled respondents.

Trump, during the campaign as now, is deeply opposed to institutions and practices that constitute the post-World War Two, U.S.-guaranteed, global economic environment. This view has the potential to roil trading arrangements between most of the countries in this survey. Similarly, Trump's instinctive approach to international security is premised on the unstinting application of military power when United States interests are engaged. His outreach to China to foil North Korea's nuclear objectives is underlaced with the threat of military action should diplomacy fail. Australia is a trading nation, globally engaged, and dependant for its security and prosperity on the stability of the international system. Australians are a watchful people on these aspects of our circumstances and do not welcome a strategy of disruption. Intuitively one would expect a Trump Administration to heighten concerns of the Australian public about the trajectory of U.S. power and influence in the region. This first cut of opinion verifies that.

But in Australia there is recent concern about China's role in the region and influence on this country. In the past 12 months there has been an increasingly visible and wide-ranging debate on Chinese soft power in Australia, prompted largely by revelations about the extent and nature of Chinese donations to Australian politicians. There have been various efforts to catalogue the extent of Chinese soft power initiatives and influence in Australian media, schools and universities, and political institutions. There has been a number of closely reported arrests of Australian academics and business people in China. Similarly, there has been a number of decisions rejecting Chinese state investment into Australian companies on national security grounds: the August 2016 decision by the Australian Government to reject the acquisition of electricity network Ausgrid by China's state-owned State Grid Corporation being the most high profile.

There is currently some degree of flux in Australian public opinion regarding both the United States and China, strategic currents in Asia, and Australia's place and role in the region. In the Australian federal election held on 2 July 2016, few of these issues were decisive. This is typical of the low priority Australians have traditionally accorded to national security and foreign policy issues at election time. However, since that election there have been disparate points of political emphasis on some of the issues canvassed in this survey, notably free trade, foreign investment, United States leadership in Asia and immigration. A note of caution on the sample is worthwhile here before interpretation of its findings. When questioned on their vote at the last election 29% of Australians recorded for the Coalition; 34% for Labor; 7% for Greens; 15% for other parties, while 15% voted informal or did not vote. This suggests a slight weighting of the poll toward the centre left.

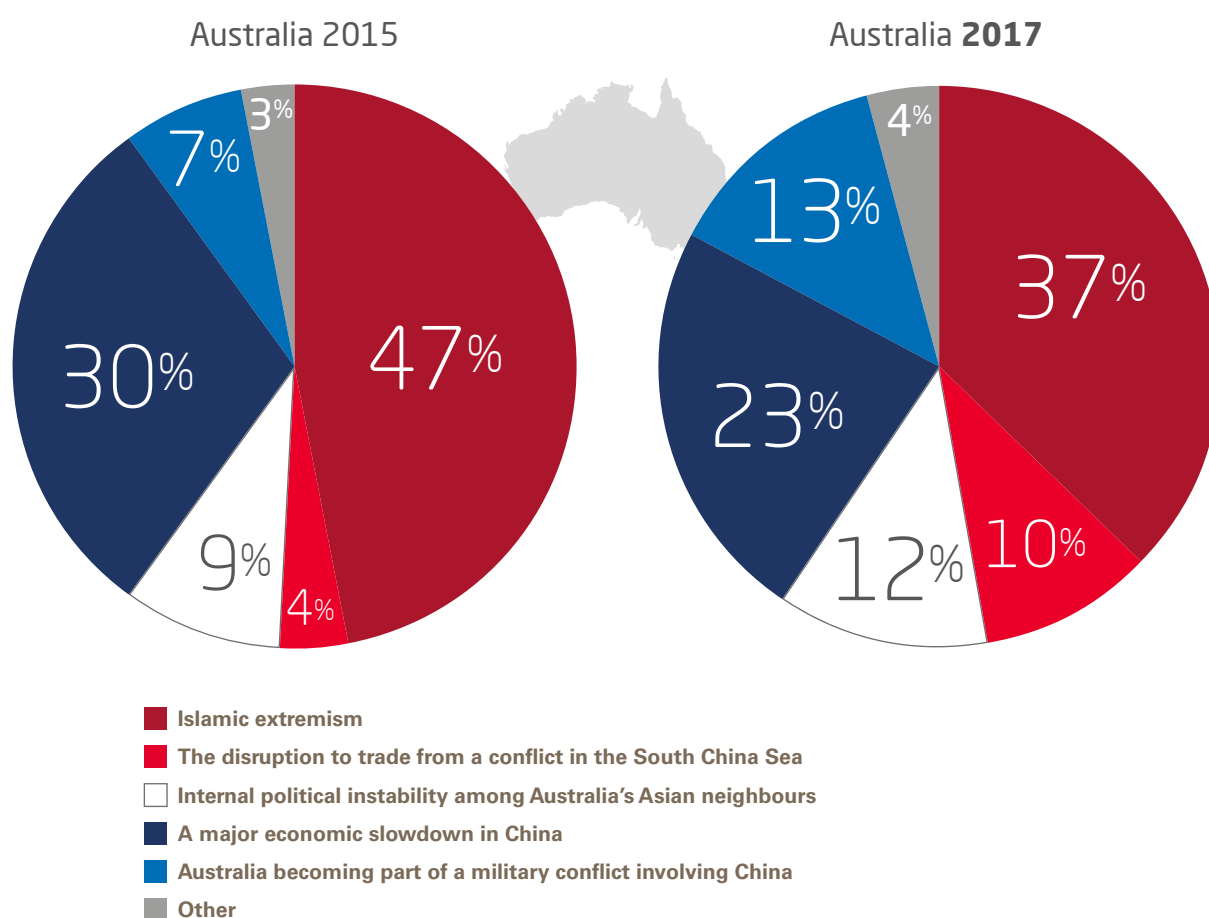
Australia

The Big Questions on the Alliance

Australia's American alliance was conceived in and is sustained by a search for reassurance in a strategic environment perceived as threatening, at least potentially, to Australian security and wellbeing. There has been some change in how Australians perceive their security from 2015 to 2017 (Figure 20). In 2015, 47% of Australian respondents judged the major threat to the country to be Islamic extremism. That has now (in 2017) dropped to a still very high and dramatic 37%, though this is perhaps less noteworthy than might be thought. The re-prioritisation of threat perceptions is entirely covered by an upgrading of possible conflict with China; a rise from 4% to 10% in those concerned with the disruption of trade from a conflict in the South China Sea; an increase of 7% to 13% in Australian respondents concerned about involvement in a

military conflict with China. These numbers remain low but the movement is apparent. Australian's this year again overwhelmingly characterised the U.S.-China relationship as a competitive one. During the Obama administration the United States had many disagreements with China, yet its overwhelming focus was to contain them through diplomatic engagement underpinned by intense, structured activity. The early stages of the Trump administration, by contrast, stressed "unfair" trade competition with China and a need to enhance the United States' military profile in the region. One possible interpretation of the evolved threat perceptions apparent in this survey is that Australians have formed a slightly dimmer view of the likely outcome of strategic competition between the United States and China.

Figure 20. Biggest threat to Australia

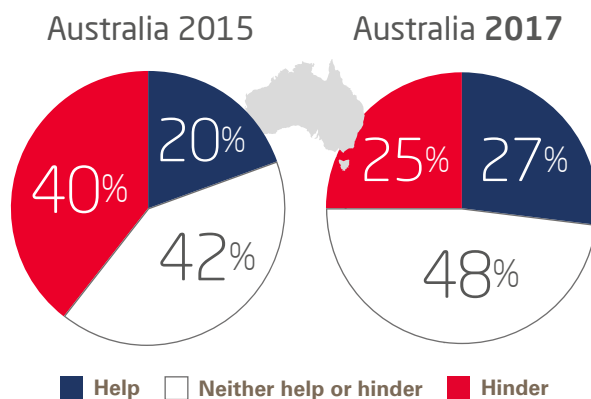


Australia

Asked whether the Alliance made the biggest threat more likely, Australian respondents showed limited movement from the 2015 survey, mostly well within the polling margin of error; 39% to 40% on the 'likely' front; 50% to 54% on the "no difference" default position. There was a small though significant shift in those stating that the alliance makes major threats to Australia less likely: 11% down to 6%. One wonders at the content of the 'biggest threat in the mind of these respondents. Given the drop in the perception of the Islamic extremist threat but the relative stability in all but the last number it seems likely that the latter have Sino-American relations in mind.

In that light, the answers to the question of whether the Alliance helps or hinders Australia's relationships in Asia (Australian respondents identified us as an Asia/Pacific nation 2 to 1 in both polls) are somewhat counter intuitive. The 'helps' group moved from 20% to 27% and the default, 'neither helps nor hinders', from 42% to 48% (Figure 21). The 'hinders' group dropped from 40% to 25%. These are big movements on big numbers. They suggest that whatever Australian respondents might feel about a general movement in strategic weight against the United States, they are not concerned that the alliance will restrict Australia's ability to navigate the new strategic environment. This is amplified by the fact that of the 25% who see the alliance as hindering Australia's relationships in Asia, 19% see it as doing so only a little.

Figure 21. Will alliance with the United States help or hinder Australia's relationship in Asia



Which leads to the critical question of support for United States access to Australian defence facilities. 'Allow military bases or increased access' responses stayed at 24%; the default, 'keep the same access' at 59%; and 'decrease or remove' at 18%. Perhaps in the answers to this series of questions about threats,

the impact of the alliances and defence access we might expect to see movement on the next survey. The trajectory of United States' policy in Afghanistan, Iraq/Syria and Korea may well produce a greater ask of Australia. While support for the Alliance and US-Australian defence connections have been remarkably resilient through US Administrations with jarring policies, the disconnection of the Trump administration from the verities of its post-World War II global stance might begin to impact as attitudes translate into policies and actions.

Continuities and Discontinuities

Looking more broadly at the region, there are some discontinuities in Australian perceptions between 2015 and 2017. The difference this year is that the gap between Australia and the other regional countries surveyed has closed. China is overwhelmingly perceived by them as much more influential, a reaction perhaps to deep uncertainties in Japan and South Korea arising from the Trump campaign's dismissal of U.S. Asian alliances and criticism of trading relationships. Australians remain even handed on whether or not the U.S. and China do 'more good than harm' in our region; on the U.S. 18% 'more good', on China, 20% 'more good'. On harm, 31% see the U.S. as 'harmful' and 30% China. The default position on the trend line on the U.S., 'about the same' is 51%, on China 50%.

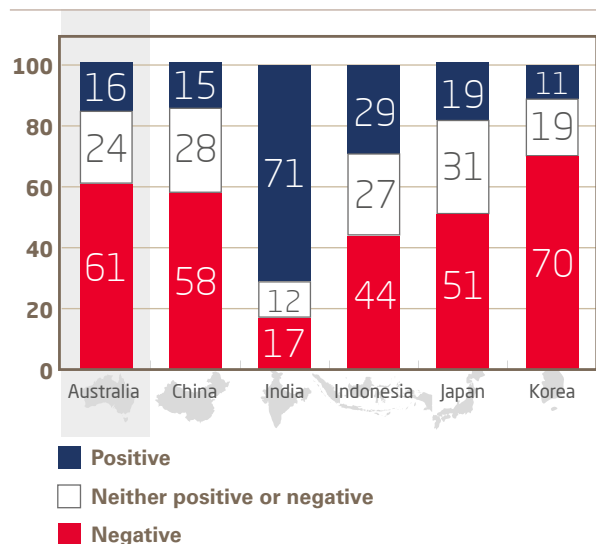
Overwhelmingly Australians perceive the U.S. as the global rule setter; 71% 'the U.S.'; 11% 'China'; 5% 'Russia'; 12% 'some other'. The institutions that are part of those rules, the U.N., I.M.F, W.T.O. are viewed more sceptically; 'effective' 31%; 'ineffective' 29%, 'neutral' 40%. Chinese opinions have much more confidence in these institutions; 'effective' 66%, 'ineffective' 29%, 'neutral' 23%.

On the value of trade with China and the U.S., Australians are overwhelmingly and basically equally in favour of its impact. Likewise Australians are favourably disposed to FTAs; 49% 'in favour'; 20% 'opposed'; 31% 'neutral'. On investment we diverge. On investment from China, 26% see it as 'good'; 38% 'bad' and 26% 'neutral'. In the case of investment from the U.S., 35% 'good'; 23% 'bad' and 'neutral' 42%.

The one question in the survey which clearly focuses on the Trump Administration reveals the challenge before Australian policy makers. It also indicates the possibility that the numbers we are dealing with in this poll may change substantially over the next year. This is particularly so when one considers how little of an experience with Trump is caught up in this survey.

Australia

Figure 22. Australia's view on the U.S.' influence with Donald Trump as President



The question seeks answers on how positive or negative his impact will be (Figure 22). 'Positive' records 16%; 'negative' 61%; 'neutral' 24% (rounded out figures). These are very bad numbers indeed. They suggest these sentiments have only had a marginal effect so far on the other numbers discussed. The next survey will reflect actual experience of the Administration, as opposed to perceptions of the President and his campaign rhetoric. One is reminded of the answer given by late Prime Minister Harold MacMillan of Britain when asked what would determine the outcome of the next election: "Events, dear boy, events."

Further questions

Beyond considering what an Australian sample more experience with the Trump administration might conclude on the issues canvassed here, there are two issues that arise in this poll worthy of further consideration. The first is how Australian sentiment might change should there be an increased Chinese military presence in the Asia Pacific. Australian responses to regional security questions and the issue of US-China strategic competition in Asia seem to draw to the ambivalent centre for now. One explanation for this might be that Australians see themselves as somewhat separate, or insulated, from the strategic dynamics of Asia. We did not ask for responses to this specific question, but responses to the question as to whether Australia should pursue an isolationist response indicate that 57% of Australians would

reject this approach, suggesting instead a preference for active Australian engagement in and with the Indo-Pacific region. Australians also record a relatively benign view overall of the potential for conflict in the Indo-Pacific. But when presented with a more stark question regarding the desirability of Chinese military presence in the region, Australian responses are quite strong: 43% would like to see a lower Chinese military presence. That's greatly at odds with Chinese respondents, of whom nearly 7 in 10 would like to see an increased presence of their own military forces in the region. Those same respondents overwhelmingly supported (82%) an actively engaged role for China in the Indo-Pacific. The Australian public debate mostly focuses on the economic aspects of China's re-rise in the region, it would be interesting to understand how Australian sentiments might change in this survey and others were the role of China in the region to be more predominantly framed as a security or military issue.

The second issue worthy of further examination is Australian views on the utility and relevance of alliances. Australian officials are prone to speak of the Australian-American alliance (ANZUS) ahead of the Australian-American relationship; that is the instrument of the alliance frames narratives of the bilateral relationship. This survey shows that Australians believe the US alliance guarantee to Australia is credible – 93% believe that in the event of a crisis America would come to Australia's aid. Yet a majority of Australians believe that the alliance makes no difference to the major threats that Australia faces, and half as many respondents this year as last believe that the alliance reduces the likelihood of threats to Australia (6% down from 11% in 2015). Only 1 in 4 of respondents (27%) believe that the US alliance is an asset to Australian engagement in Asia, though as previously mentioned fewer Australians this year are inclined to conclude that the alliance hinders Australia's relationship with Southeast Asia specifically. Australians generally show a poor awareness of other US alliances in Asia, and in this survey at least are less likely than other countries to see the United States as actively engaged in regional institutions. It seems that Australians see little utility resulting from alliances themselves, or at least their alliance with the United States. Certainly, it would be interesting to probe more deeply Australian understandings of what an alliance entails, particularly during periods short of war. And to probe what understanding Australians have of the ways that alliances can stabilise Asia during times of peace. This would seem critical work given the way that discussion of the alliance dominates the US-Australia relationship.

China



China

Author: **Dr Shao Yuqun**, Executive Director, Shanghai Institutes for International Studies¹

I. General positive evaluation of China's overall development and its influence

In general, the Chinese respondents were quite satisfied with China's regional influence, both in 2017 (43%) and in ten years' time (74%). Most think that China's influence in the region and on other regional countries has been positive although respondents from some other regional countries such as South Korea, Japan and India perceived China's influence somewhat negatively. 66% of Chinese respondents believe current global institutions like the World Bank, the International Monetary Fund and the World Trade Organisation are effective and they are optimistic about China's capability of setting rules for international affairs. One new phenomenon is that Chinese respondents' concern about North Korea or South Korea starting a conflict has risen markedly. However, overall, the Chinese respondents are quite optimistic about the future peace of the Asia-Pacific region, as evidenced by their concerns about possible conflicts between China and Japan, South Korea and North Korea and China and the United States (U.S.), which have declined dramatically.

Chinese respondents' generally positive attitude can be explained from the following perspectives. First, while the speed of China's economic development has slowed to be the "new normal" it is characterised by structural change, better growth and emission reductions, with stability that is meeting people's expectation. The Chinese central government has made great efforts to create jobs for young people, fight corruption, address the challenges of environmental pollution in the cities, transform the economic structure and narrow the gap between rural and urban areas. The government's policies are being well received by the Chinese people.

Secondly, China's foreign policy is promoting China's relations with the regional countries and serving its national interests. 74% of Chinese respondents support China's developing economic and trade relations with regional countries and believe China's influence in the region will increase in the future. With its developing capacities on all fronts, China can contribute to the security and development of the region and the world and the successful creation of the Asian Infrastructure and Investment Bank (AIIB) is testimony to that belief.

Thirdly, China has been a contributor to the current international order which has been established since World War II. Since China adopted reform and open policies at the end of 1970s and progressively joined the institutions named above, its economic and social developments have been huge; and have not only drawn attention from all over the world, but most importantly, have helped ordinary Chinese people get rid of the feeling of a hundred years of humiliation. Though some unfairness towards developing countries, especially regarding the setting of rules is still obvious, and the Chinese government has expressed its dissatisfaction and criticism publicly, and is pushing to reform these institutions, it has never tried to build a new international order.

Fourthly, at the conclusion of the survey respondents believed the Asia-Pacific region has maintained peace and stability. China has continued its policy of peaceful development and although there are some difficulties with relations between and among certain parties, the possibility of military conflicts is low. Since Tsai Ing-wen came to power in Taiwan in 2016 the cross-strait relationship has entered into a phase known as "cold peace." This means the narrow sense of status quo of the relationship has been broken because the Tsai administration has not recognised either "One China" or the "1992 consensus" which is the political foundation for the peaceful development of the cross-strait relationship. However, the broad sense of status quo is still there as the Tsai administration has learned lessons from the Chen Shuibian administration from 2001 to 2008 and has not sought constitutional independence. China's relationship with Japan has been stable, albeit on a low level last year. While no hotspot or crisis has occurred, so far there have not been many signs of improvement of this bilateral relationship. It is noteworthy that since the disputes on the Korean Peninsula have become tense, the number of Chinese respondents concerned that either North or South Korea will start a conflict has increased by 11% and 17% respectively. This reveals that the legacies of the Cold War are still a threat to regional security and need to be managed carefully by all concerned parties.

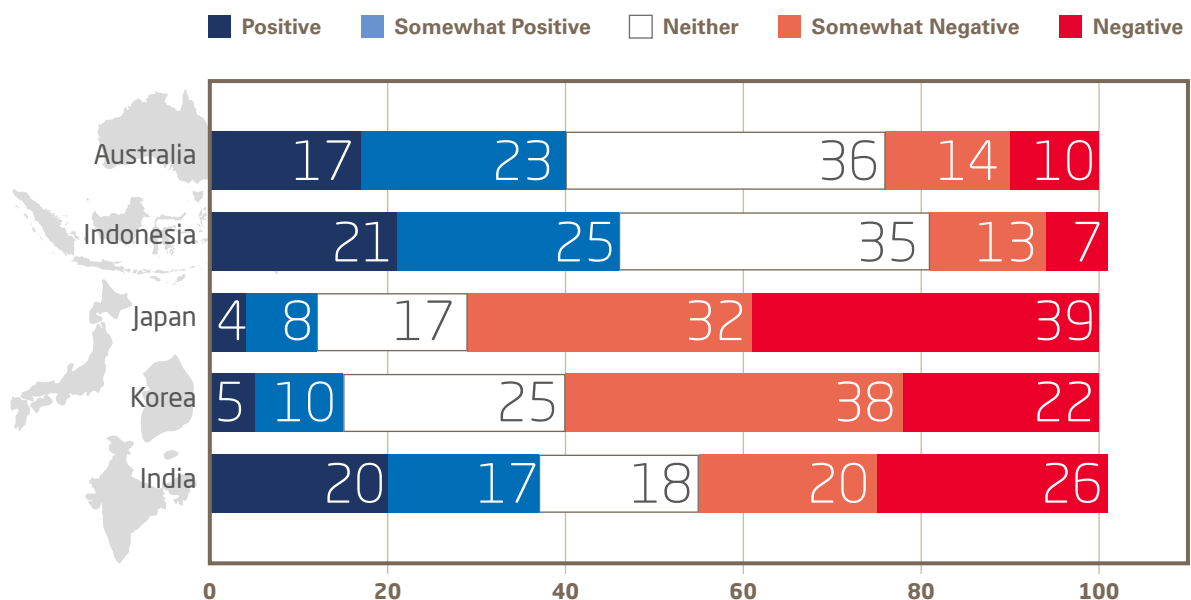
¹ Dr. ZHANG Zhixin from SIIS also contributed to this chapter.

China

Interestingly, the perception of Chinese respondents on China's role in the Asia-Pacific region differs slightly compared with some other surveyed countries, especially South Korea, Japan and India (Figure 23). Due to the cold relations between China and Japan it is not surprising that 71% of Japanese respondents continue to see China's influence more negatively. It is a pity that a growing number of South Korean

cities citizens have angrily boycotted products related to the Lotte Group, a South Korean/Japanese conglomerate which offered land to the South Korean Government for the deployment of THAAD. Another possible reason for the worsening image of China among South Korean people is China's policy towards North Korea. India, as a new member of this survey group, has shown a somewhat negative attitude

Figure 23. Influence China has on Country



respondents surveyed this year think China has a more negative influence on South Korea than the previous survey. A possible reason for this is because China has strongly criticised the South Korean Government's acceptance of the deployment of THAAD (Terminal High Altitude Area Defense), the U.S.' anti-ballistic missile system in its territory and in some Chinese

towards China. This may be explained by the popular views in India that China does not support India's ambition to be a global power, China takes a pro-Pakistan position regarding disputes between India and Pakistan, and China has been frequently challenging India's control in the disputed territory between it and Pakistan.

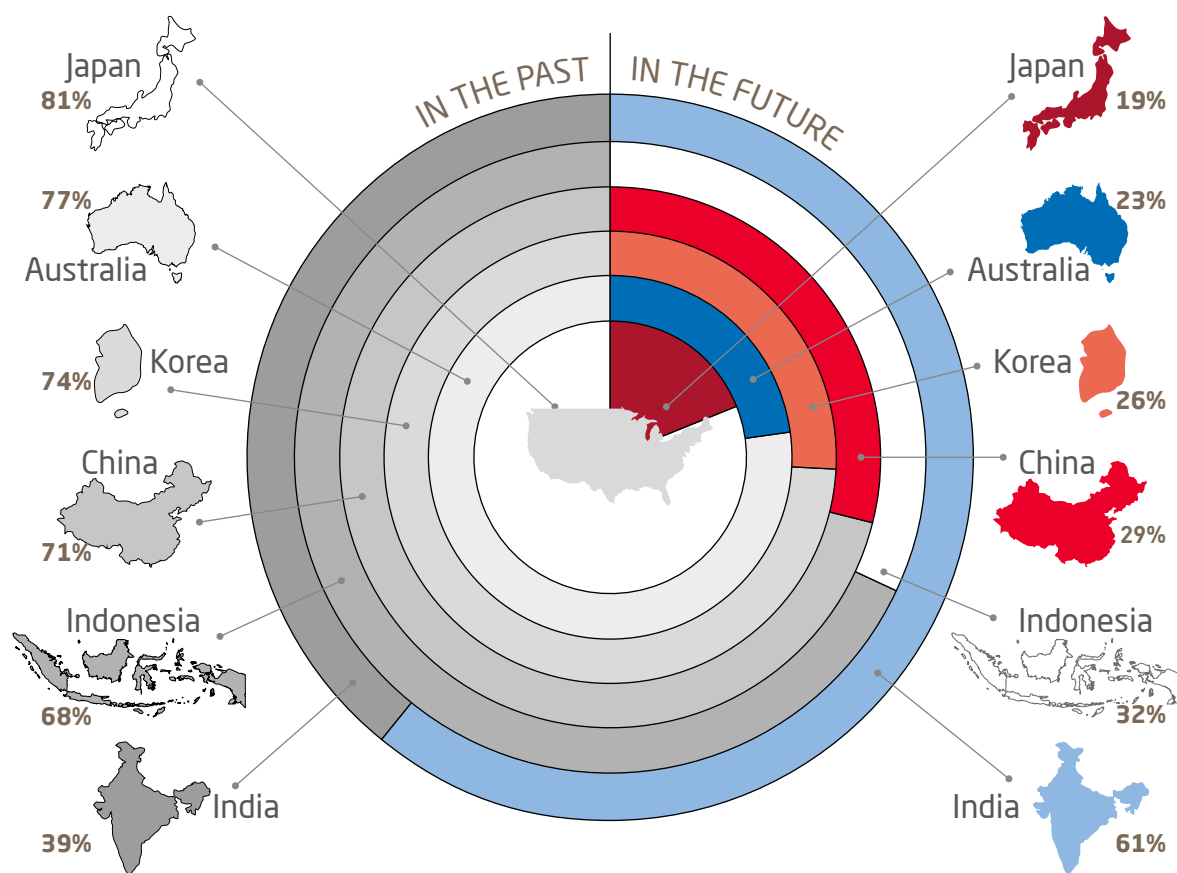
China

II. Perception of the US Role in the region

The overall Chinese respondents' perception of the U.S.' role in the Asia-Pacific region has not changed from the results of the last survey (Figure 24). A majority of Chinese respondents think that the influence of the U.S. is declining and will continue to

Interestingly, more than 40% of the Chinese respondents were mistaken in believing that the United States was a member of regional institutions, such as ASEAN, AIIB, RCEP and EAS.

Figure 24. The United States' Best Years



decline in the future. 43% of Chinese surveyed think that the U.S. does more harm than good in the region and regardless of whether President Trump was or was not mentioned in the questionnaire, 58% of Chinese respondents believe that the influence of the U.S. will decline in the next five years. This result is quite different compared to the results of U.S. allies in the region, and show that some respondents have no confidence in President Trump, whose behaviour and attitude towards the U.S. allies were considered to be extreme during last year's election campaign.

The reasons for this could be interpreted from the following two angles. On one hand, the Obama administration's Rebalance to Asia and the Pacific strategy was seen by most Chinese as a threat to China's interests in the region. Though the Obama administration had repeatedly said that the Rebalance strategy was more of a hedging policy, ordinary Chinese still believed the strategy aimed to contain China. For example, the United States is not a concerned party in the so called South China Sea issue and the territorial and sovereign disputes are between China and some other regional countries, but the South China Sea arbitration case initiated by the

China

Philippines was planned and supported by the Obama administration. Hence the South China Sea issue was perceived to be a tool for the Obama administration to exert its influence in the region. Some Chinese people also believe that the United States has been hypocritical since it has never accepted an international court's ruling when it infringed sovereignty or territorial interests while it asked China to do so.

Additionally, the United States' decision to deploy THAAD in South Korea has angered some Chinese people. The North Korean nuclear issue has been in place for decades but when the situation started to get tense in 2016, the United States decided to deploy THAAD in South Korea. According to the Chinese official statement and academic research, THAAD cannot offer security protection for South Korea in the face of a North Korean nuclear or conventional military threat, but will put China under United States military surveillance. To the Chinese this is another example of the Obama administration trying to narrow China's strategic space in the Asia-Pacific region.

The relatively high number of Chinese respondents who wrongly held the perception regarding the U.S.' participation in regional institutions and the UNCLOS² can be explained in two ways. One is that recognition of these institutions in China is relatively low, either because of their ineffectiveness in regional affairs, or the lack of reports about United States' policies towards these institutions by the Chinese media. The other is that ordinary Chinese are more geostrategically-focused and pay less attention to international law or regional institutions.

III. Perceptions of the China-U.S. relationship and its future development

Overall, 75% of Chinese respondents support maintaining the current status of the bilateral relationship, or to strengthening it in the future, which means that the majority of Chinese people understand the importance of the relationship, not only for China, but for the region too. They support developing economic and trade relations with the U.S., with two figures worthy of special attention. Forty three percent of the Chinese respondents think that a China-United States conflict is not at all likely while 5% think that the conflict is very likely. Comparing these results with 27% and 12% respectively of last survey, it is a positive sign for the future of this bilateral relationship.

Some Chinese respondents have referred to domestic matters such as the increasing political divide within the United States and its huge debt, but the majority of respondents regard the biggest challenge for the U.S. to be China's economic development (29%).

With the U.S. Presidential elections occurring in November 2016, both campaigns attracted much interest in China. This was partly because the Democratic candidate Hillary Clinton was very well-known in China and the Republican candidate Donald Trump had an image of being a loud mouthed, anti-establishment, successful businessman. Donald Trump has since become quite popular in China where he is seen by many Chinese as a good deal maker without an ideological bias. At the same time, due to a more mature understanding of the U.S. political system and its domestic politics, Chinese people understood that the campaign rhetoric was different to real policy options. The presidential candidates criticised China and made China a scapegoat for domestic political reasons, however, once a candidate is in the White House, they understand the importance of a stable U.S.-China relationship and return to the framework that previous U.S. governments have strengthened.

The survey results indicate that 45% of Chinese respondents realise that China and the U.S. do not have to fight each other, since neither can afford a military confrontation between two nuclear countries. Nor do they accept the theories raised by some international relations experts or the media, that sooner or later, a rising power (China) will challenge the established power (U.S.) militarily.

² In every country in this survey, more than sixty percent of the respondents think that US is a member of UNCLOS.

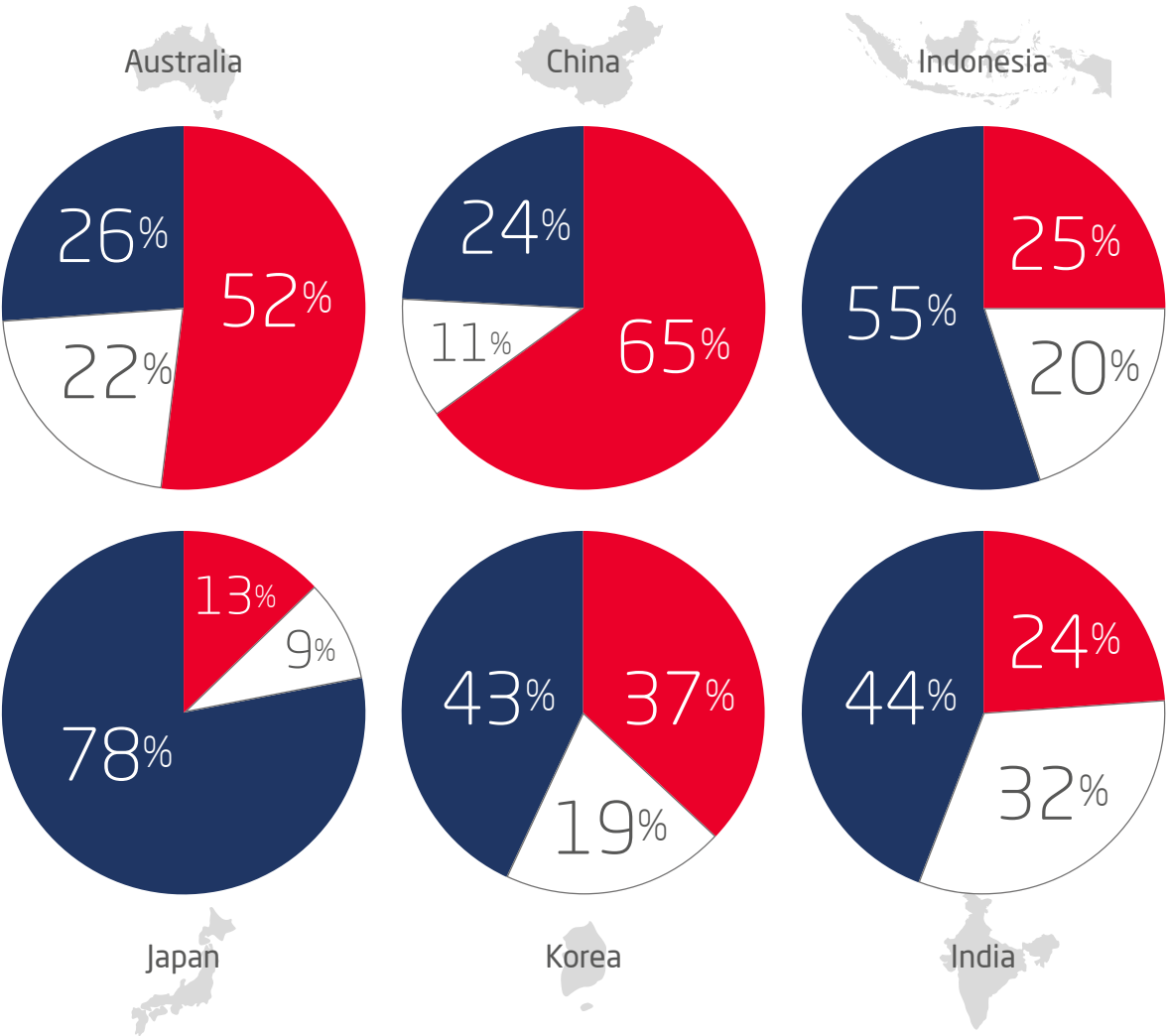
China

China’s increasing power was seen by 39% of Chinese respondents as the biggest source of conflict between China and the U.S., which is much higher than the South China Sea issue (19%) and the Taiwan question (16%). The results also indicate that many

Chinese respondents think that the Rebalance strategy adopted by the Obama administration was to hedge, if not contain, the rise of China.

Figure 25. Leading Superpower View of China Relative to US

- China will never replace the U.S. as the World’s leading superpower
- China has already replaced the U.S. as the World’s leading superpower
- China will eventually replace the U.S. as the World’s leading superpower



China

IV. Perception of China's future

Generally, Chinese respondents are quite confident and optimistic about China's future (Figure 25). 76% of Chinese respondents believe that China will eventually become a superpower. 82% of Chinese respondents believe that China should pursue an internationalist engagement with the world; this is strikingly the highest among all the surveyed countries. The confidence about the future is based on respondents' satisfaction with the current status of their country and their strong belief in the great rejuvenation of the Chinese nation. On one hand, although China has met many challenges on the economic and social fronts, the policies adopted by the central and local governments have been quite successful in maintaining peace, stability, and economic growth. On the other hand, the violence after the Arab Spring in some Middle Eastern countries, together with the rise of populist forces in Europe and the U.S. have become negative examples to Chinese citizens that democracy does not necessarily bring good governance and that China should continue to develop ways that are based on its own experiences and with its own characteristics.

Perhaps because the Chinese respondents are satisfied with China's current status and they still consider they are beneficiaries of globalisation, 56% welcome foreign investment into China's own infrastructure building. 55% support signing FTAs (free trade agreements) with other countries and 49% think immigration is good for the economy. This attitude is quite different to the developed economies in the region.

While they are more open to economic globalisation, culturally the Chinese respondents were more sensitive about safeguarding their own traditions and cultural roots. 41% worry about the Chinese culture being harmed by immigrants; 91% think it's important to 'feel' Chinese and respect political institutions and laws; 71% think it's important to be followers of national religion(s);³ and 86% believe it is important to have Chinese ancestry. Perhaps an explanation for these beliefs could be found in China's long history. The Chinese have a strong commitment to their traditions and the Chinese culture has always been strong enough to absorb the outside cultural factors. The strong influences of globalisation have not changed that so far.

³ It's contrary to many foreigners' perception that Chinese do not have religious beliefs.

India



India

Author: **Dhruva Jaishankar**, Fellow, Brookings India

Introduction

India stands at an important juncture today. Its central government has probably its strongest political mandate since the 1980s, and arguably since the 1970s. The country's economic growth is going well by global standards, but with considerable room for improvement. It has also become more diplomatically active with unprecedented cooperation with the United States and Japan, continuing defence relations with Russia, complex security and economic ties with China, and new forms of outreach and engagements in its immediate neighbourhood, the Indian Ocean, Southeast Asia, and the Middle East. Today, the rest of the world matters more for India than ever before. India's trade-to-GDP ratio is higher than China's or the United States', it is the world's largest defence importer, it has a large diaspora that is a major source of investment and remittances, and it is among the most dependent major economies on energy imports.

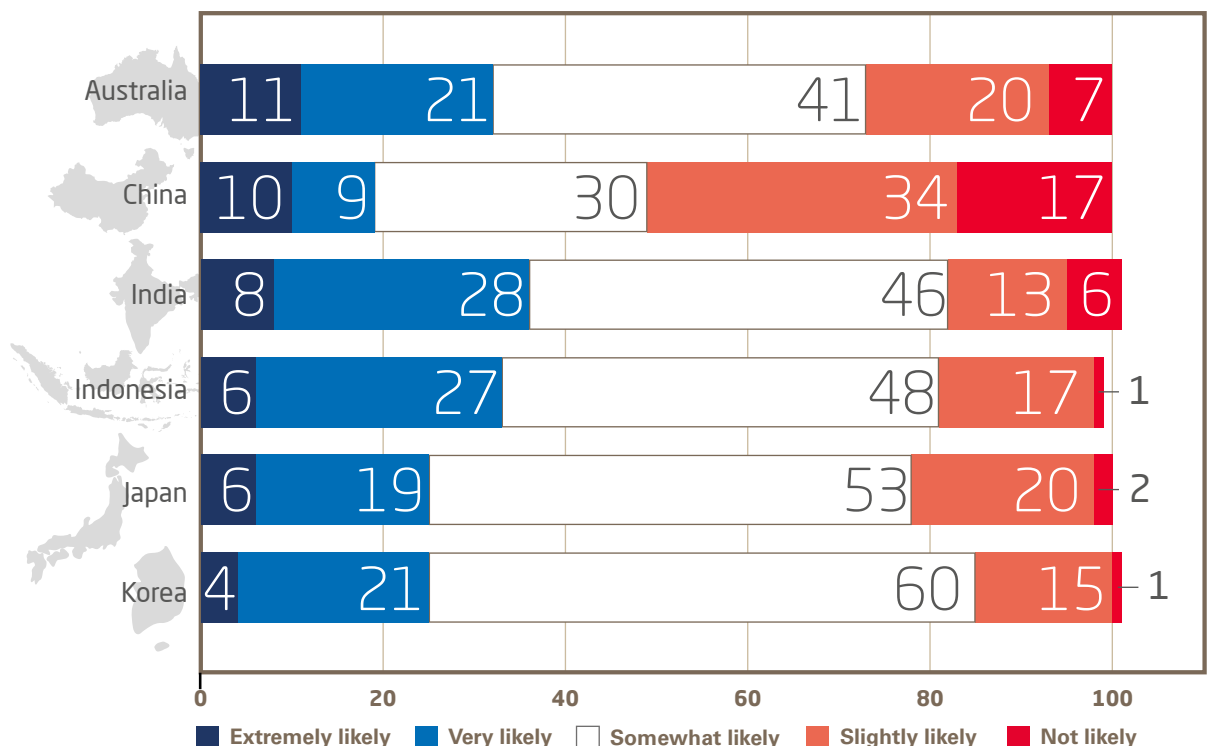
Despite these developments the understanding of how the Indian public perceives international developments is poor, with few large-scale, face-to-face or telephone surveys conducted outside major metropolitan areas.

Many surveys also display a lack of awareness or opinions about international issues. The latest survey helps to fill the gap in understanding of public Indian attitudes concerning the United States, China, and the international system; India's role and relations with Pakistan; Indian identity and democracy; and perspectives on trade, investment and immigration.

The United States, China, and the Asian Order

Perhaps the most striking takeaway from the survey is that the Indian public remains overwhelmingly optimistic about the United States with 52% believing it has more influence in Asia than it did 10 years ago, and an astounding 61% believing that the United States' best years are ahead of it. This is in contrast to responses from the five other countries polled, where only between 19% and 32% believe the United States' best years are in the future (Figure 26). The survey revealed that 53% of Indian respondents would like to see an increased United States military presence in Asia, and 82% believe that the United

Figure 26. Countries view on the U.S.' commitment to defend its allies in the Asia-Pacific

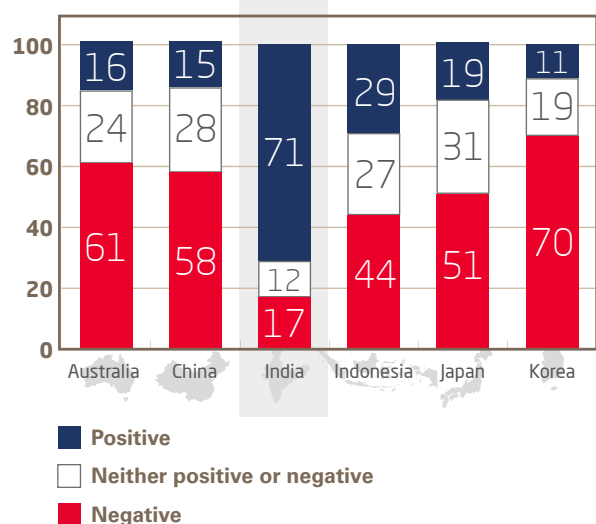


India

States is somewhat, very, or extremely likely to keep its alliance commitments in the region. Most tellingly, 52% of Indian respondents believe the United States does more good than harm, which is very favourable compared to 18% to 36% among United States allies such as Australia, Japan, and South Korea. By contrast, given the large number of Indian elites who now study in the U.S., Indian respondents showed a lower preference (32%) for going to university there over their home country – if costs were the same – than respondents from China (61%), South Korea (46%), and Indonesia (35%).

The overall goodwill and optimism concerning the United States appears to translate into considerable and broad enthusiasm for the India-United States relationship with 65% of Indian respondents believing the United States has a positive impact on India, compared to 40% to 50% among the United States' Asian allies. Seventy percent of respondents believe that trade between India and the United States is good or very good, with 71% believing United States investment in infrastructure in India is positive. Rather surprisingly, 78% of Indian respondents believe that the United States and India *already* have a defence alliance, and yet 73% also believe that ties should be stronger. This enthusiasm has not been tempered by Donald Trump's election as President. When reminded that Trump is now the United States President, 71% of Indian respondents said that the United States will have a positive impact over the next five years, compared to 11% to 29% among the other countries polled (Figure 27).

Figure 27. India's view on the U.S.' influence with Donald Trump as President



The positive sentiments concerning the United States stand in contrast to wariness about China with 48% of Indian respondents believing that China does more harm than good in the region, compared to 26% who believe it does more good than harm. Indeed, 22% of Indian respondents believe that China does much more harm than good, a figure comparable only to 28% of Japanese respondents' concerns about China. In relation to views on trade and investment 38% of Indian respondents have negative views on trade with China, only slightly fewer than the 40% who have favourable views. The views on Chinese investment in infrastructure were more sceptical, with just 38% of Indian respondents having favourable views and 40% being unfavourably disposed. Overall, 37% of Indian respondents believe Chinese influence on India is positive, while 46% believe such influence to be negative.

At the same time, Indians appear to feel Chinese influence less than many others in the region with 30% believing that China exercises significant influence on India, while 37% believe it has little or none. This is far below other countries with 51% of Australians, 60% of Indonesians, 57% of Japanese, and 68% of South Koreans who believe that China exercises a great deal or a lot of influence on their country. However, 49% of Indians believe that China's military presence in the region has increased, a higher figure than respondents in South Korea, Australia, and Indonesia. And yet a general sense of little direct Chinese influence on India may explain why, despite their concerns, Indian respondents remain somewhat open to better relations with their northern neighbour with 47% of Indian respondents believing ties with China should be stronger and 34% believing they should be weaker.

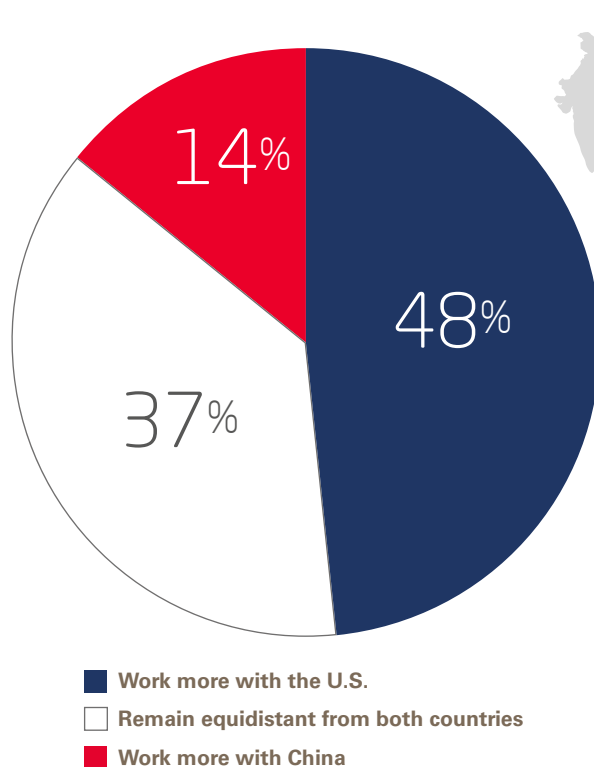
The enthusiasm for the United States, plus the wariness, unfamiliarity, and cautious goodwill reflected in Indian respondents' views of China, seem to translate into Indian perspectives on the changing Asian and global institutional order. Indian respondents generally believe that existing international institutions have been somewhat effective (49% to 16%), and that the United States remains the primary rule-setter (37%), followed surprisingly by Russia (24%) and only then by China (16%). The relatively high rating for Russia may be informed by the Cold War and India's defence partnership with the Soviet Union dating from the 1960s and 1970s.

Ultimately, Indian respondents were conscious of an intensification of United States-China competition with 77% believing that the relationship is marked by competition, fear, or enmity. After India-Pakistan conflict, 40% of Indian respondents believe that United

India

States-China conflict is most likely in the region which is higher than those who believe conflicts in the Korean Peninsula (37%), East China Sea (31%), or Taiwan Straits (31%) are extremely or very likely. A plurality (35%) believe that China is the most likely regional player to initiate conflict and 53% of Indian respondents believe that China's growing economic or military power is the toughest challenge facing the United States today. But there are some contradictions: despite faith in the United States as a global leader with 32% of Indian respondents believing that China has already replaced the United States as the leading superpower, 44% – are convinced that China will never surpass the United States as a superpower.

Figure 28. If there's more tension between the United States and China, what should India do?

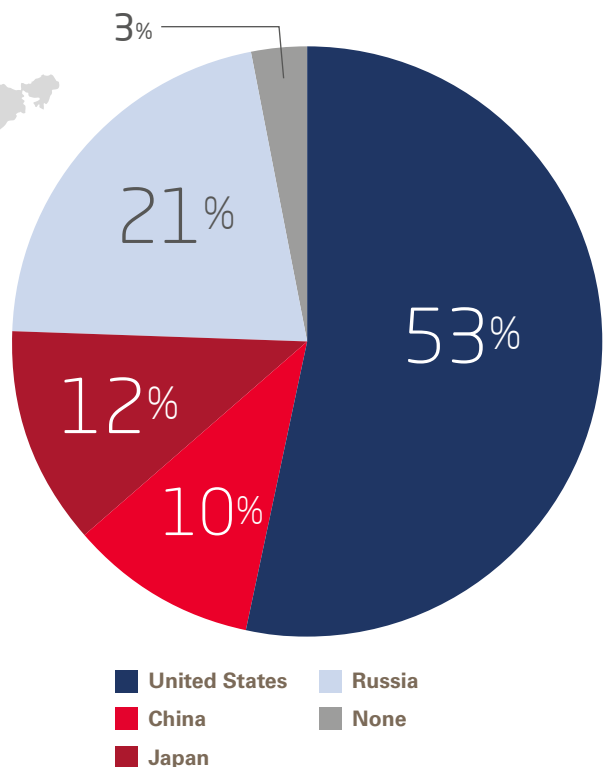


When asked what should India do in the event of greater competition in Asia the Indian respondents' answer was quite clear. In the event of greater United States-China tension, 48% believe that India should work more with the United States while only 14% believe China should be the preferred partner (Figure 28). Overall, 53% of Indian respondents believe that the United States should be India's closest international partner, followed by Russia (21%), Japan (12%), and China (10%) (Figure 29).

Public Awareness, India's Role, and India-Pakistan Relations

One striking aspect of the survey results relates to issues on which Indian respondents appear well-informed. Generally, they seem to have a high awareness of United States politics: 69% of Indian respondents correctly identified the length of a U.S. presidential term as four years, a higher number than Chinese respondents (65%). Additionally, Indian respondents seemed aware of United States' alliances with Japan (63%) and Australia (62%), much more so than United States' commitments to South Korea (47%) and Taiwan (39%). Beyond that,

Figure 29. India's view on which country should be its closest international partner



Indians respondents reflected very low levels of understanding about Asia's multilateral institutions and the United States' role in them. Only 35% to 38% correctly said that the United States was not party to regional arrangements such as the Asian Infrastructure Investment Bank (AIIB), Association of Southeast Asian Nations (ASEAN), and Regional Comprehensive Economic Partnership (RCEP) negotiations.

India

The Indian respondents also appeared conflicted about India's role as an international player. On the one hand, there seems to be a great deal of pride with 44% of Indian respondents believing their country has the most influence in Asia today compared to 28% who believe the United States does, and 18% who believe China does. In the five other countries surveyed, only 0%-2% believe India is the most influential country in Asia today. Moreover, 53% of Indian respondents believe that India will have the most influence in Asia in a decade's time, where 15% of Japanese and 6% of Australians agree, but only 1% of Chinese and Indonesians do.

Despite this apparent confidence about India's influence, Indian respondents were split exactly 50-50 when it comes to playing a bigger international role, and indeed are much more sceptical than respondents from other countries surveyed about becoming embroiled in other countries' problems. By contrast, 82% of Chinese, 77% of Koreans, 74% of Indonesians, 70% of Japanese, and 57% of Australian respondents disagreed that they would be better off staying home and not concerning themselves with problems in other parts of the world.

Pakistan remains a great preoccupation and concern for Indian respondents with 43% believing that India is most likely to next use force overseas in the context of a limited conflict with Pakistan, while 48% think that serious military conflict between India and Pakistan is extremely or very likely. In relation to Islamist terrorism, 43% of Indian respondents perceive it to be the most important external challenge facing India (compared to 17% saying nuclear weapons, 16% saying climate change or water shortages, and 11% saying the rise of China). Additionally, Indian respondents believe that in light of closer China-Pakistan relations, it must either try to isolate Pakistan while cooperating with China (33%), or cooperate with other countries against the China-Pakistan axis (43%).

Trade, Investment, and Immigration

Indian respondents' views on trade and investment – including free trade agreements – are extraordinarily favourable, in contrast to India's reputation for being sceptical about trade commitments. A remarkable 68% of Indian respondents favoured free trade agreements (in contrast to 16% who oppose them) (Figure 30), which is more than any of the other five countries surveyed (where favourable responses ranged between 49% and 63%). A similar number – 67% – support foreign investment in infrastructure, including in electricity, water, transportation and communications, compared to 15% who oppose

(Figure 31). However, support for FTAs by Indian respondents is still only moderate or mild, with very few enthusiastically supportive.

Figure 30. India's view on free trade agreements

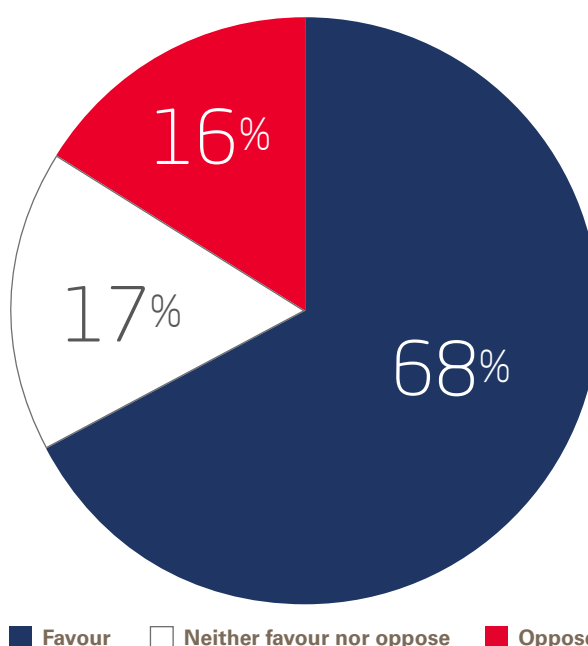
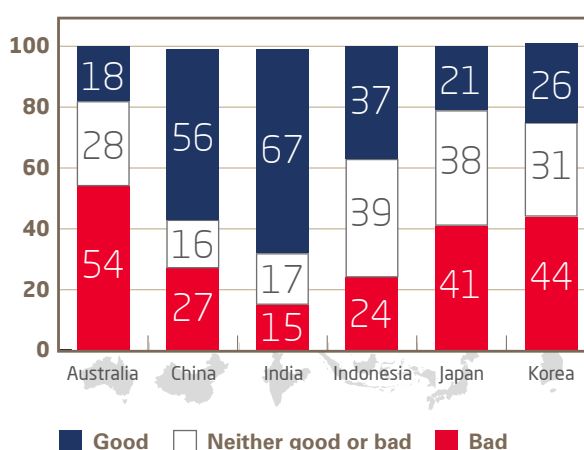


Figure 31. Countries' view to support foreign investment in Infrastructure



Indian respondents' views are conflicted, but telling, when it comes to immigration. Although 50% agree that immigration at present levels is good for the economy (28% do not), 86% of respondents also believe that immigration will take away jobs. They are also divided on the cultural impact of immigration

India

with 41% believing that Indian culture is harmed by immigrants, while 33% disagree. This is a trend that is consistent with other more pluralistic societies – both Australia and China – but is in contrast to much stronger concerns about the cultural effects of immigration in Japan.

Democracy and National Identity

The survey results concerning the importance of democracy are among the most fascinating to examine. Indian respondents generally rated democratic governance an important factor, with 79% rating it 7-10 out of 10. This is in the same range as other Asian democracies, with 88% of Indonesians, 82% of South Koreans, and 81% of Australians rating this 7-10, all slightly higher than the corresponding figure for China (75%). Surprisingly, only 65% of Japanese deemed democracy similarly important. However, Indian respondents at 29% – in line, roughly, with Japanese (29%), Koreans (35%), and Indonesians (15%) – were much less willing than Chinese (41%) to rate democracy 10 out of 10 in importance. While democracy is obviously important for Indian respondents, it is not an all-or-nothing issue, as it appears to be for many Chinese.

In terms of national identity, Indians seem to think that birth, respect for India's political institutions and laws, and 'feeling Indian' are of utmost importance where 77% to 78% of respondents felt these attributes were either very important or fairly important. Indian ancestry (76%), residing in India (75%), and speaking an Indian language (74%) were considered less important, but only slightly so. By contrast, only 65% of Indian respondents believed religion was very or fairly important, fewer than Chinese (71%) or Indonesians (84%), but far more than Australians, South Koreans, and Japanese.

Conclusion

We can conclude from the survey results that the Indian respondents are extremely optimistic about the United States and incredibly supportive of closer India-United States ties (although they are far less enthusiastic about going to study in the United States). They also take a positive view of American leadership and believe China represents a major challenge to that. By contrast, the Indian respondents are wary and sceptical about Chinese influence which extends to India-China economic relations. At the same time, they are less conscious of Chinese influence than many others in Asia and, despite their apparent reservations, would like to see better relations with Beijing. Indian respondents also believe that United States-China relations are becoming more competitive, and expressed a strong preference for working more closely with the United States.

Indian respondents are also conflicted about India's role in international affairs. While proud of Indian influence in the region they are wary of interfering in other countries' concerns. Indian respondents seemed at least superficially familiar with United States' politics, its alliances with Japan and Australia, and the United States-China competition, but showed a poor understanding of other regional arrangements and institutions. They remain chiefly concerned with the challenge posed by Pakistan, particularly terrorism.

The Indian responses also reflect broad but mild support for trade agreements and foreign investment. While appreciative of the positive economic effects of immigration, they are worried about the resulting loss in jobs and believe that birth, respect for institutions and law, national sentiment, ancestry, residence, and language are significantly more important identifiers than religion. While generally deeming democracy important, Indian respondents do not consider it of ultimate importance; a view that is broadly consistent with residents of other democratic Asian countries.

Indonesia



Indonesia

Author: **Dr. Dino Patti Djalal**, Founder, Foreign Policy Community of Indonesia

The survey on America's Role in the Asia Pacific conducted in Indonesia this year indicates some important shifts in the perceptions of the Indonesian respondents. It is obvious that the 2016 United States presidential election was a significant factor in these shifts. At the time of the survey respondents were still in the dark regarding the Trump Administration's foreign policy, including its Asia policy and the state of United States – Indonesia relations.

A shift is clearly evident on the question of America's influence in Asia. When a similar question was asked last year, the U.S. had a clear lead over China and Japan (47% to 22% and 25%). In the 2015 survey many respondents felt that the most influential country in Asia was China (42%) followed by America (32%) and Japan (17%). The US decrease (15%) was larger than the drop experienced by Japan (8%). It can be assumed that the U.S. withdrawal from the Trans Pacific Partnership, which reflected unpredictability and President Trump's "America First" world view, helped shape this changing perception towards the United States. This trend also applies to the long-term perception.

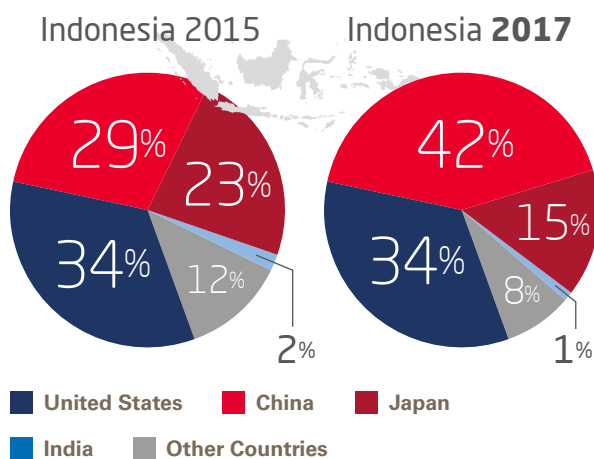
In 2015 the United States was seen as the most influential country in the next 10 years, ahead of China, Japan and other countries. This year those who held that view about the United States remained the same (at 34%), but this was second to those who believe that China will be the most influential country in Asia in the coming decade (at 42%) which is a considerable 13 point rise from the previous survey (Figure 32).

Indonesian respondents' more favourable views about China represent a considerable rise compared to respondents from Australia, China, Japan, and Korea. This may relate to the fact that twice as many Indonesian respondents believe that the United States best years are "in the past" compared to those who said "in the future". However, the United States is also seen as a country with by far the most influential role in setting rules for international affairs compared to China, Russia, and other countries.

It is worth noting that when respondents were asked about United States' influence in Asia today compared to 10 years ago, only 26% believed that it had decreased, while 35% said it had "stayed about the same", 18% believed it had "increased a little", 16% believed it had "moderately increased" and 5% believed it had "greatly increased". It should be remembered however, that 10 years ago marked the end of the Presidency of George W. Bush; a time when the US international image was problematic in the aftermath of the unpopular Iraq war.

When respondents were asked more specifically about the United States' influence in the next five years under the presidency of Donald Trump, most replied that the United States could be a negative influence (44%), compared to "positive influence" (29%) and "neither positive nor negative" (27%). What is interesting is that when the same question was posed without mentioning President Donald Trump in the sentence, the answer was much more positive with 38% of respondents believing that over the next five years the United States will have a positive influence compared to 26% who believe it will have a negative influence.

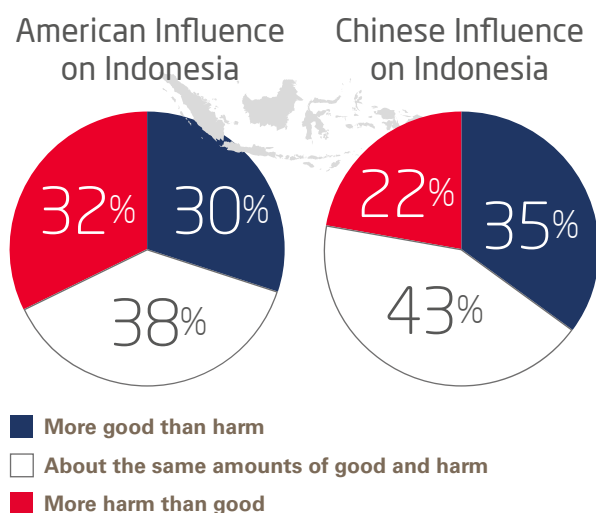
Figure 32. Country with the most influence in ten years



Indonesia

On the question of whether the United States does more good or harm to the Asia-Pacific region, 32% responded with "more harm," slightly more than those who responded with "more good" (30%), while the rest believed about the same amount of "good and harm" (38%) (Figure 33). These numbers are approximately the same as the last survey's results. When a similar question was posed about China, more Indonesian respondents believed that China would bring "more good than harm" (35%) compared to those who believe that China would bring "more harm than good" (22%).

Figure 33. The United States' influence on Indonesia and China's influence on Indonesia in 2017: Are they doing more good or harm?



When Indonesian respondents were asked "what the relationship with the United States should be," the number who said "stronger" was much higher than those who said "weaker" (42% to 18%), while 40% thought it should "stay the same." Interestingly, the Indonesian results for those who said the relationship should be "stronger" was lower than respondents in Japan, Korea, and China but higher than respondents in Australia. When the same relationship question was posed about China, more than half of Indonesian respondents felt that Indonesia's relationship with China should be stronger (52%) compared to those who felt it should be "weaker" (14%).

When Indonesian respondents were asked about the United States' influence on Indonesia, those who said "great deal" or "a lot" (46%) were slightly higher than who said "a moderate amount" (38%) while the rest said "a little" (13%). Furthermore, when a similar question was asked about China's influence on Indonesia, the majority of Indonesian respondents said "a great deal" and "a lot" (58%) which is higher than when the same question was asked in the previous survey (44%). Significantly, Indonesian respondents have a positive view about U.S. influence on Indonesia in general. Those who said the U.S. has a "positive" influence (40%) is much higher than those who said the opposite (25%) while (38%) said the U.S. influence in Indonesia is "neither positive nor negative".

Indonesian respondents also have a generally positive perception of the United States economic engagement with Indonesia. Those who said United States- Indonesia relations are "good for the country" (43%) was much higher than those who said it is "bad for the country" (14%). Similarly, those who said that US investment is "good for Indonesia" (42%) is about three times higher than those who viewed otherwise. This is despite the fact that the survey was taken in the midst of high profile controversy over an American mining company in Indonesia. Interestingly, Indonesian respondents who favour U.S. investments are considerably fewer than those in China and India.

There is however, an interesting twist in Indonesian respondents' views towards United States military presence in the Asia Pacific. Slightly more respondents believe that it should be increased than those who said it "should stay the same" (42% to 40%), while 17% believe it "should be decreased." Indonesian respondents who favour greater US military presence in the Asia Pacific are higher than respondents in Japan and Korea. Most Indonesian respondents also believe that the U.S. is likely to keep its promise to defend its allies in the Asia-Pacific if they were attacked. It also worth noting that an overwhelming majority of Indonesian respondents described the relations between China and the US as "competitors".

Indonesia

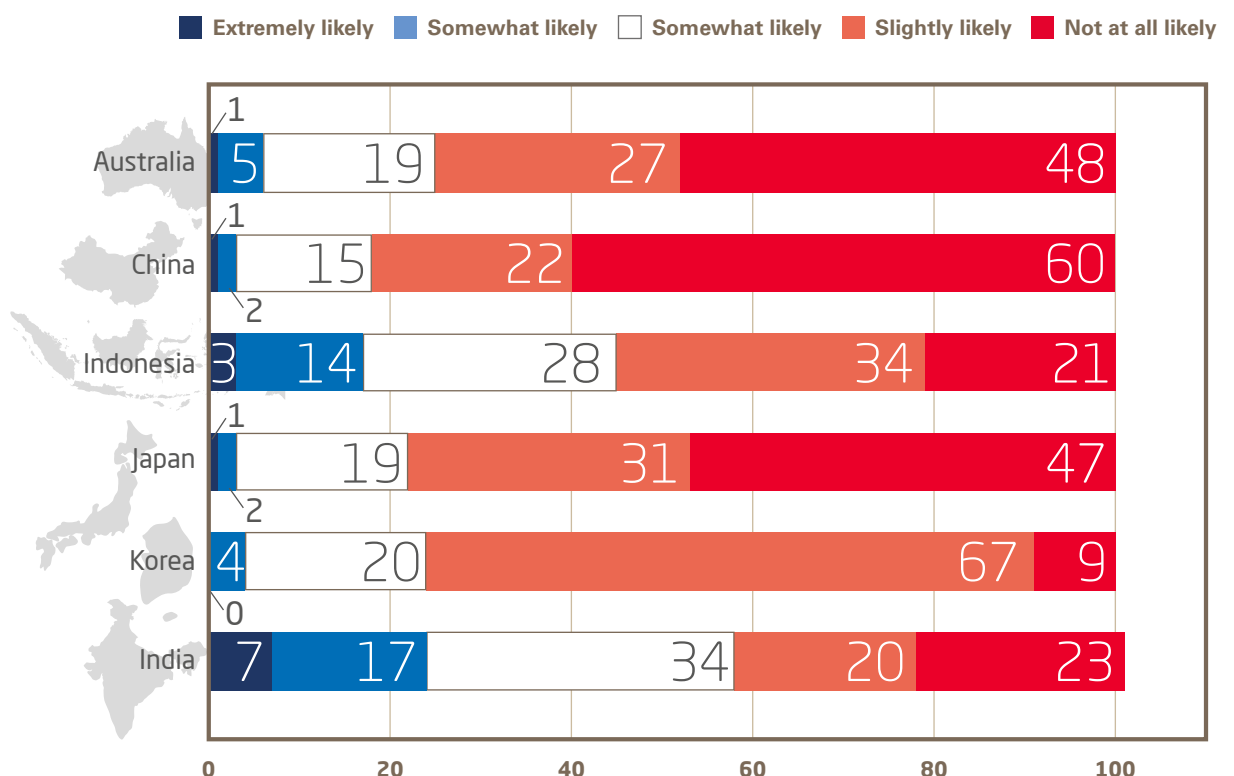
Another interesting finding pertains to attitude towards Free Trade Agreements where more Indonesian respondents "favour" FTAs (53%) compared to those who "neither favour nor oppose" (28%) and those who "oppose" (20%). In the context of Indonesian political culture where free trade has been generally seen as suspect, this is welcome news. Similarly, when Indonesian respondents were asked their opinion on foreign investment in Indonesia that delivers important services such as electricity, water, transport, and communication, the 37% who said that it is "good for the country" is considerably higher than those who said it is "bad for the country" (24%), while 39% have a neutral attitude.

When Indonesian respondents were asked "what is the toughest challenge for the United States," the majority of respondents believed it is the rise of radical Islam (31%), compared to debt and slow economic growth (28%), domestic political divisions (21%), and domestic racial and ethnic issues (20%). When the same question was asked in the previous survey, most Indonesian respondents believed that "China's increasing economic power" is the toughest challenge

for the United States. Moreover, in the context of the rise of radical Islam, most Indonesian respondents believed that Indonesia and the United States should "greatly extend" their cooperation in dealing with ISIS (45%) which was slightly higher than those who said "moderately extend" (42%).

Sixty seven percent of Indonesian respondents believed that there will be a serious military conflict between the United States and China, of which half of those who said it is "very likely" (31%). An overwhelming number of respondents also feared that there will be serious military conflict between the U.S. and Russia (73%). This concern persisted despite media reports that President Donald Trump was actively seeking closer relations with Russia. When Indonesian respondents were asked about the possibility of a serious military conflict between Indonesia and Australia, 42% of respondents said it is "likely" which is twice as many as those who said it is "not at all likely" (21%) (Figure 34). This somehow reflects the love-hate relationship between Indonesia and Australia in the past 10 years.

Figure 34. The possibility of serious military conflict between Australia and Indonesia

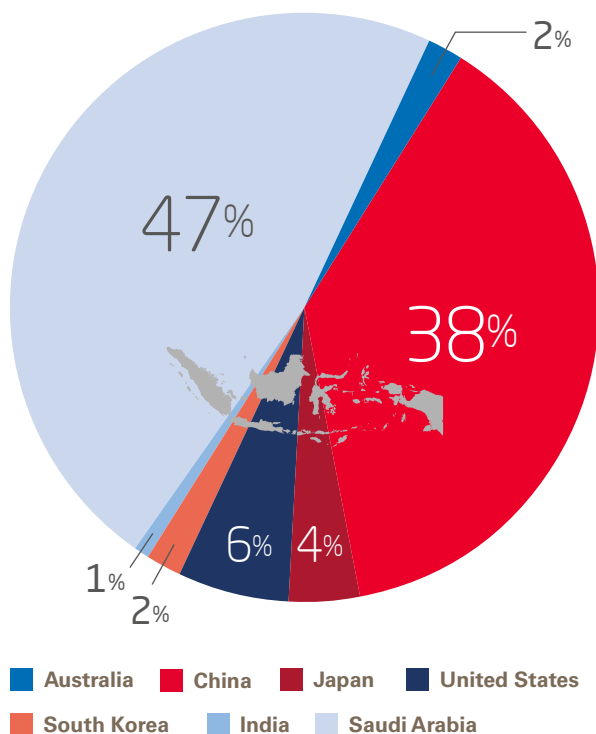


Indonesia

Interestingly we found that most Indonesian respondents were not aware that the United States is not a member of the Asian Infrastructure Investment Bank (AIIB), Regional Cooperative Economic Partnership (RCEP), or the United Nations Convention on the Law of the Sea (UNCLOS). Fifty five percent of Indonesian respondents believed that the U.S. "was a member" of the AIIB, 64% thought that the U.S. was a member of the RCEP, and 67% thought that the U.S. was a member of the UNCLOS.

When Indonesian respondents were asked about which country has the closest relationship with President Joko Widodo's government, nearly half believed it was Saudi Arabia (47%), followed by China (38%), and the U.S. (6%) (Figure 35). This finding is not surprising since Indonesia has the world's largest Muslim population, many of whom go to Mecca each year. This is also correlates to the fact that most Indonesian respondents believed that Saudi Arabia (36%) is "the most friendly" country to Indonesia followed by, interestingly, Malaysia (17%), Singapore (13%), China (11%) and Japan (10%). However, most of the Indonesian respondents said "Malaysia" (41%) when they were asked "which country is the

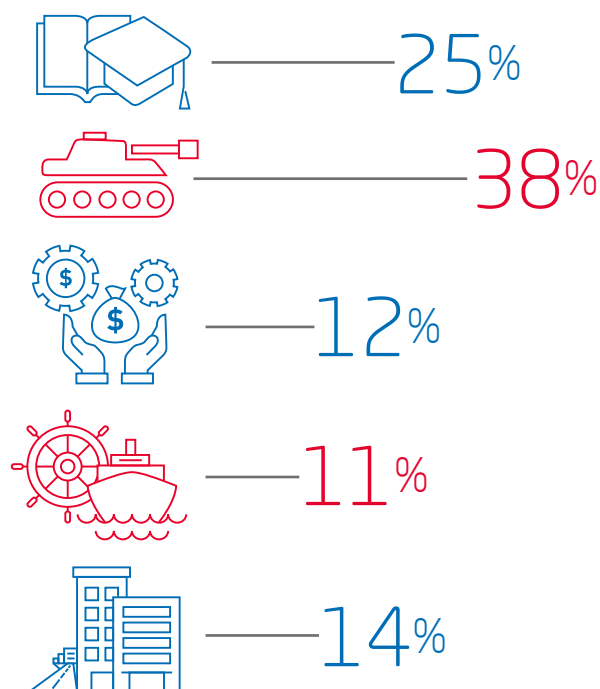
Figure 35. Which country does the Joko Widodo government have the closest ties?



most hostile towards Indonesia" nearly twice as many as those who said Australia (22%), and the United States (13%).

When it comes to the question of "in which single area can the United States assist Indonesia most," 38% of Indonesian respondents thought it is in military and defence, 25% said in education, 14% in infrastructure, 12% in trade and investment and 11% in maritime development (Figure 36). However, when asked the same question in relation to China, an overwhelming majority of Indonesian respondents thought that China could assist Indonesia the most in trade and investment (70%), followed by those who thought it could be in infrastructure (14%).

Figure 36. In which single area can the United States assist Indonesia most?



Indonesia

When summarising the results of the survey, Indonesian respondents generally have scepticism towards immigrants. When asked about whether they believed immigrants will take jobs away from them almost all said "it is likely" (97%). This is the highest result compared to respondents from other countries such as Japan (87%), Korea (86%), Australia (84%), India (77%), and China (72%). Furthermore, when asked whether "immigrants are good for economy," the majority of Indonesian respondents said "disagree" (47%) a much higher result than those who said "agree" (24%) while 30% said "neither agree nor disagree." This may correlate to the fact that when Indonesian respondents were asked "how

important it was to have been born in the country," an overwhelming majority said "important" (90%), which was much higher than Indian respondents (78%), Chinese respondents (68%), Japanese respondents (59%), Korean respondents (52%), and Australia (41%).

When Indonesian respondents were asked if the country would be better off in isolation and did not concern itself with the problems in other part of the world, 74% said "disagree" (while 26% said "agree" (26%). This result reflects an internationalist disposition which is the basis of Indonesia's "independent and active" foreign policy.

Japan



Japan

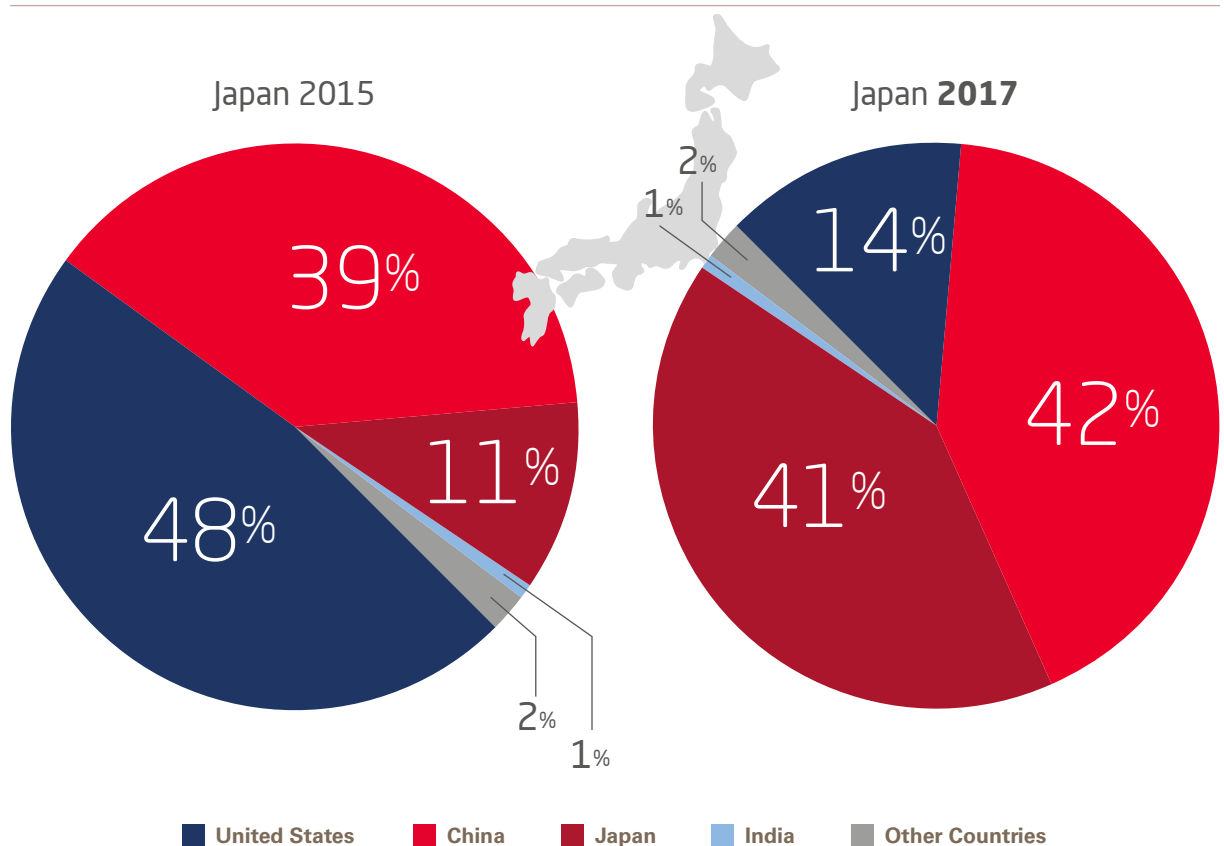
Author: **Kuni Miyake**, Research Director, The Canon Institute for Global Studies

What in Japan has changed since the 2015 survey?

The most dramatic change in the views of the Japanese respondents this year seems to be the sharp drop (from 48% in 2015 to 14% in 2017) who see the "United States (US) influence" in Asia on one hand, and the big surge (from 11% to 41%) for "Japan's own influence" in the region, while the proportion of Japanese respondents who see the "Chinese influence" is basically unchanged (from 39% to 42%) (Figures 37 and 38).

Similar results are witnessed regarding the question "which country will have the most influence in Asia in ten years?" where fewer Japanese respondents see the "U.S. influence" (from 28% in the 2015 survey to 22% in 2017) and more see "Japan's influence" (from 13% to 25%) in Asia in 2027. Comparatively, it is worth noting that there was a slight increase (from 40% to 44%) in Chinese respondents who see the U.S. influence in Asia, while there is a decrease (from 56% to 43%) in Chinese perceiving China's influence within the region.

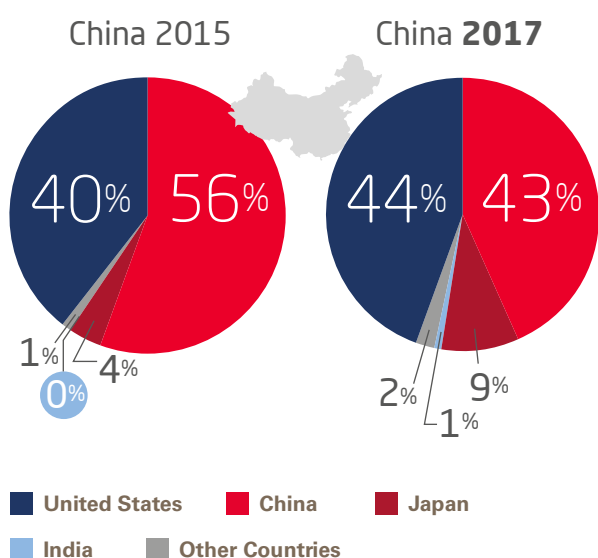
Figure 37. Countries that have the most influence in Asia today



Japan

Although it might be premature to draw a sweeping conclusion now, one of the reasons for such changed attitudes may be the Trump phenomenon of 2016-2017. Possible assumptions are that the majority of Japanese respondents may have been alarmed by the victory of Mr. Trump who could make the U.S. more isolationist and, therefore, they may have felt more obliged to take care of their archipelago by themselves.

Figure 38. Country that has the most influence in Asia in ten years (last year's survey) and today



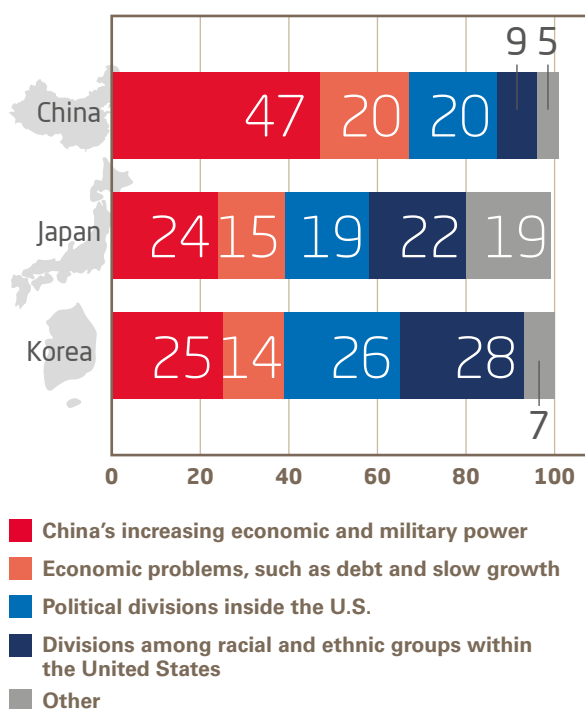
On the other hand, in China, more respondents may have been concerned about the Trump administration's potential hardline policies in regard to Beijing and therefore may be less confident in their own country's influence in the region. Those assumptions are worth examining in the 2018 edition of the Survey on America's Role in the Indo-Pacific and beyond.

Views on the challenges of the U.S.: Another Trump effect?

A more subtle but probably no less significant change in percentage points was recognised in the Japanese respondents' views on the challenges for the U.S. (Figure 39). Fewer Japanese respondents in 2017 see the Chinese economic (7%) and military power (17%), as well as its economic problems (15%) as the toughest challenges for the U.S., while more focused on the U.S. domestic political divisions (19%), including those among racial and ethnic groups (22%).

It is intriguing to note that the Korean respondents seem to echo the Japanese views, paying more attention to America's domestic affairs, while the Chinese respondents focus was less on racial or ethnic issues in the U.S. This again may be attributed to the victory of Mr. Trump who tends to be more concerned about domestic economic issues using such infamous slogans as "America First".

Figure 39. Toughest challenge for the United States according to China, Japan and Korea



WHAT REMAIN THE SAME?

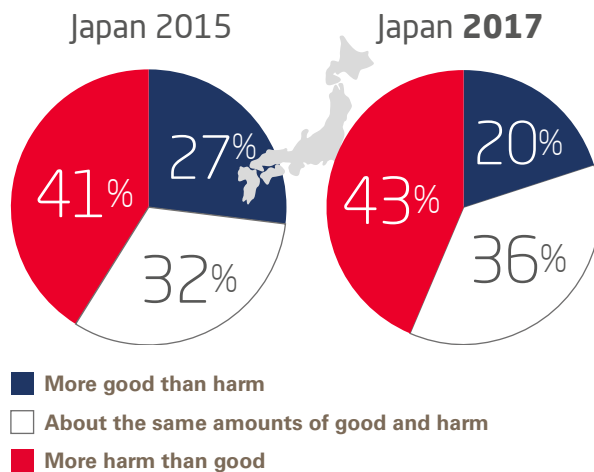
Despite the above changes in the Japanese respondents' views regarding the U.S., the images of the United States and China held by the Japanese general public seem rather stable. Among many examples, the following three cases are most noteworthy.

Japan

Views on whether the U.S. does good or harm to the region

In response to the question “whether the U.S. does good or harm to the region,” Japanese responses are basically unchanged in 2015 and 2017 (Figure 40).

Figure 40. The United States’ influence to Asia Pacific region: Are they doing more good or harm?



Among the country's surveyed in the region, the most dramatic shift is Korean respondents perceiving the U.S. influence in the region “doing more harm than good” from 6% in 2015 to 19% in 2017.

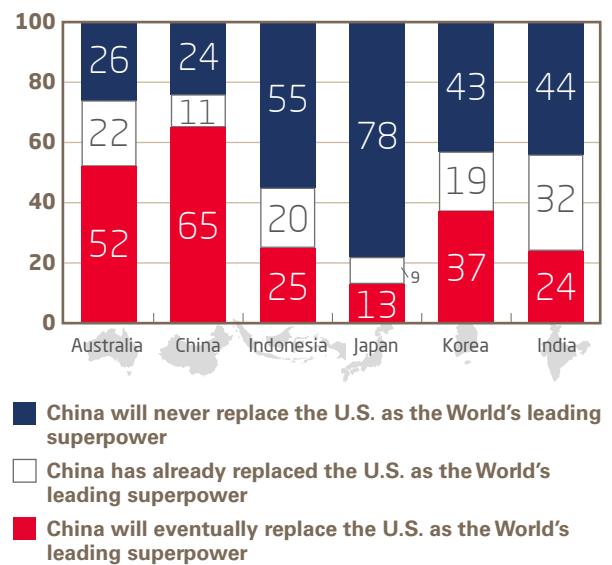
Views on China's Influence on Japan and the bilateral relations

Similarly, the Japanese respondents' views on China seem to be fairly stable. While the majority recognise that the Chinese influence on Japan will remain high, many also believe that the Japan-China bilateral relations remain the same as before. They even see a bilateral military conflict as less likely now than they did in 2015. This may reinforce an assumption that Japan and China are learning how to agree or disagree with each other.

Views on the superpower status of China: Despite the Trump effect?

The overwhelming majority of Japanese respondents (78% in both 2015 and 2017) still believe that China will not replace the U.S. as superpower, while far fewer Koreans (from 36% to 43%) and Indonesians (from 46% to a notable 55%) agreed with the Japanese respondents (Figure 41). Such a negative view on China's “superpower-ship” is intriguing, given that almost one-third of the Japanese respondents in 2017 considered the U.S. had lost influence in Asia.

Figure 41. Leading Superpower View of China Relative to US



WHAT'S NEW IN THIS YEAR'S SURVEY?

In the 2017 survey many new questions were introduced, therefore, comments on those new questions must be reserved for future examination. However, the following three sets of data may be worth mentioning because of its relevance for future surveys.

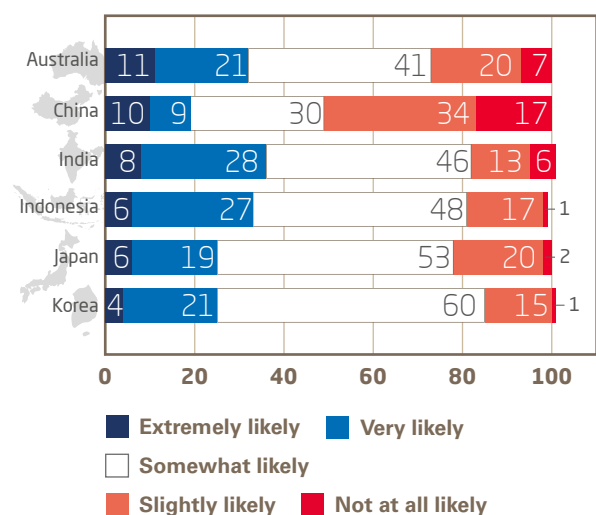
Japan

Views on the U.S. alliance commitment in Asia

More than three quarters of Japan's respondents in 2017 believed that the U.S. will likely to keep its promise to defend its allies should they come under attack while 84% of Korean respondents answered in favour of the U.S. commitments (Figure 42). On the other hand, the majority of Chinese respondents answered to the contrary and showed strong doubts about and under-estimate the U.S. alliance promises.

The respondents from other U.S. allies and friends; Australia, India and Indonesia, showed similar responses to that of Japan. Since China's confidence in the U.S. security commitment for its allies in the region is an important element in the deterrence power of the alliance system in Asia and the Pacific region, the Chinese response to this particular question will have to be closely examined.

Figure 42. Countries view on the U.S.' commitment to defend its allies in the Asia-Pacific



Views on China's investment in Japan

A surprising majority of Japanese respondents considered investments from China as something bad, while other countries were much more in favour of Chinese investments (Figure 43). On the contrary, one-third of the Japanese respondents welcomed investments from the U.S., while 71% of Indian and 68% of Chinese respondents were wholeheartedly in favour of American investments in their countries (Figure 44).

It remains to be seen whether these numbers are the result of Japan's nationalistic/ethnocentric behaviour or just a result of rational economic and business judgments. (This will also be dealt with at the end of this section.)

Figure 43. Japan's view on investment from China

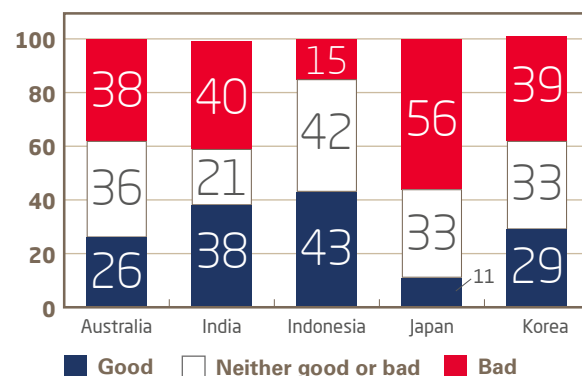
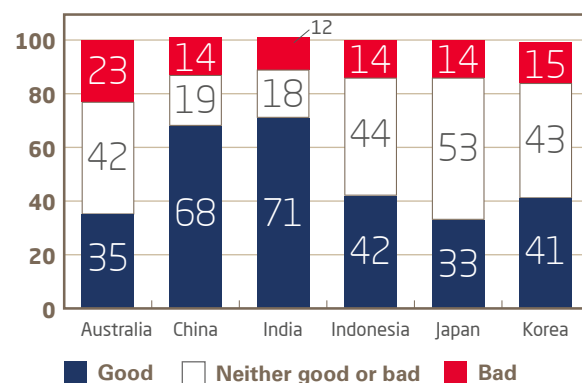


Figure 44. Japan's view on investment from the United States



Japan

Need for a more dynamic historical perspective

In the 2015 Asian Research Network survey, a section dealt with “nationalism and ethnocentrism” which stated that “Japanese respondents provided the most ethnocentric set of responses” and Chinese respondents “recorded the second highest level of ethnocentrism.” These conclusions may require additional exploration.

First of all, this kind of simple comparison among average in-group, out-group and ethnocentrism scores only deals with current data of a relatively static nature, without taking into account the historical dynamism behind it. Such methodology will only provide a shallow examination of nationalistic or ethnocentric features of the peoples in the surveyed countries.

Secondly, therefore, in order to fully analyse and comprehend such nationalistic tendencies of the surveyed countries, sociopolitical and historical perspectives must be incorporated into the statistical and, therefore, the statistical analytic process. Without such intellectual attitudes, one could easily be trapped

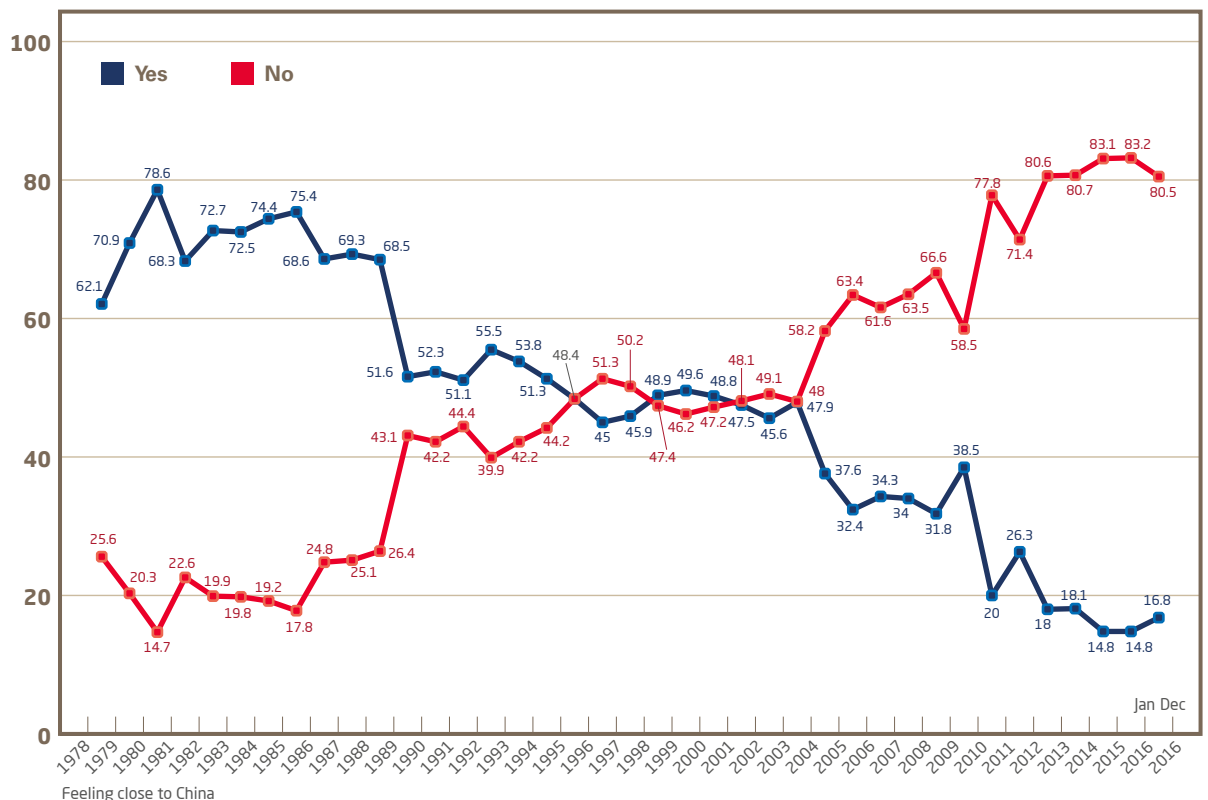
in an intellectual pitfall and draw stereo-typical conclusions which could be logically useless.

Therefore, when you analyse the ethnocentric rivalries between the Japanese and the Chinese, for example, one must use an ample amount of historical data in addition to the results of surveys in a specific year or period. There have been a variety of opinion polls or surveys on Japan's favourable ratings of the Chinese in the past.

One of the most trustworthy opinion surveys on Japan's favourable ratings of the Chinese, which has been conducted by the Japanese Government's Cabinet Office since 1978, clearly shows that the uneasy feelings regarding China among a majority of Japanese are relatively recent. This even challenges a familiar stereotypical cliché that Japanese people are the most ethnocentric because such feelings are historical and deep-rooted.

Figure 46 shows the results of the annual surveys on “How close do you feel to the Chinese people?” which have been conducted by the Cabinet Office in the Government of Japan.

Figure 45. Annual surveys results on “How close do you feel to the Chinese people



Japan

As can be seen in Figure 45, approximately 70% of Japanese respondents constantly provided favourable views on the Chinese people since 1972 and throughout the 1970s and 1980s, when Japan normalised relations with the People's Republic of China (PRC). Such tendencies abruptly stopped in 1989 when the Tiananmen Square incident took place on June 4, 1989. The approval rating among the Japanese respondents for the people of the PRC dropped sharply (from 68.5% in 1988 to 51.6% in 1989).

However, despite the newly-adopted series of nationalistic/patriotic policies by the PRC government since the 1990s, the ratio of Japanese respondents who feel close to the people of the PRC remained at around 50% until 2003, a year after a North Korean family of five tried and eventually failed to enter the compound of the Japanese Consulate-General in Shenyang on May 8, 2002.

Although it is noteworthy that almost half of the Japanese respondents still maintained a close feeling regarding the people of the PRC during the period between 1990 and 2002, even in those years, there was little ethnocentric or nationalistic feeling for China among Japan's general public.

Unfortunately, the approval ratings of the people of the PRC sharply dropped (from 47.9% to 37.6%) in 2004 and again in 2010 and 2012 when PRC fishing boats and official vessels entered Japan's territorial waters around the Senkaku islands. In 2017 the Japanese respondents' approval rating of the people of the PRC is at an historic low of 14.8%, while their disapproval rating reached 83.1%. Needless to say, these numbers are not traditional and could be attributed to the PRC's increasingly assertive behaviours regarding the peoples and the governments in the region, including those of Japan.

Korea



Korea

Authors: **Dr James Kim**, Research Fellow, The Asan Institute for Policy Studies
Chungku Kang, Senior Research Associate, The Asan Institute for Policy Studies

South Korea

The period 2015 to 2017 has been a watershed moment for South Korea in more ways than one. First came the historic Comfort Women Agreement in December 2015 between Japan and South Korea, followed by the fourth and fifth nuclear tests in North Korea during January and September 2016. North Korea also has conducted an unprecedented number of tests during 2016 and 2017. The international community responded with new sanctions while South Korea, Japan and the United States also moved to increase cooperation on dealing with the growing threat. South Korea in particular, was heavily criticised by Beijing for cooperating with the U.S. in moving ahead with the installation of the Terminal High Altitude Area Defense (THAAD) system on the Korean Peninsula. The unexpected vote in favour of Brexit in the United Kingdom and possible demise of the European Union was followed by the surprising election result that ushered in the presidency of Donald J. Trump. On the domestic front, President Park Geun-hye was impeached and removed from office for her personal dealings with an advisor who was not subject to proper clearance and oversight. It is within this rapidly changing context that we must examine the trends in public opinion conducted in the first weeks of March 2017.

China and the United States

There are two glaring departures in the South Korean public opinion between 2015 and 2017. One is the significant rise in public perception about China's influence in Asia and the other is the decline in the perceived role of the United States in the region. Similar trends can also be observed in Australia, Japan, and Indonesia but the magnitude of this shift is most pronounced for Japan and South Korea.

China

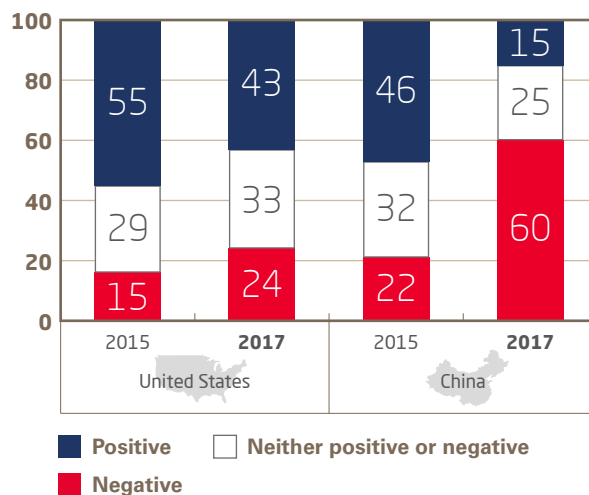
There are at least two possible explanations for the trends described above. One is the sudden change in bilateral relations between China and South Korea as a result of the South Korean Government's decision to move forward with the THAAD deployment on the Korean Peninsula as of March 2017. Prior to this move, Sino-ROK relations were on cordial terms. This has not been the case since the U.S. began delivering the missile interceptor components. The THAAD decision was largely motivated by concerns over the rapidly-evolving North Korean threat and political turmoil in South Korea surrounding President Park Geun-hye's impeachment. China's response was one of strong condemnation, with the Chinese national media encouraging the Chinese public to retaliate against South Korean businesses. The South Korean public reaction was equally defiant with favourability for China and its leadership hitting an all-time low.

The rise in anti-Chinese sentiment is also reflected in the South Korean respondents' view about China's influence on South Korea (Figure 46). When asked to rate whether the respondents thought China's influence on South Korea was "positive," "negative" or "neither," over 60% responded that it was "negative." This is nearly a 40% swing from the 2015 survey.

⁴ Kim Jiyeon, Kang Chungku, and John J. Lee. "Changing Tides: THAAD and Shifting Korean Public Opinion toward the United States and China." Issue Briefs. The Asan Institute for Policy Studies. March 20, 2017.

Korea

Figure 46. Positive/Negative Influence the United States/China has on South Korea, 2015~17



When asked to rate whether China's role in the Asia-Pacific region has done "more harm or good," there was a 37% increase in South Korean respondents stating that China has done "more harm than good" during the period 2015 to 2017. Not surprisingly, the corresponding shift to a more negative view about China's role in the region appears to have come from individuals who held a rather balanced view about China in 2015. There was 26% drop among respondents who stated that there was "about the same amount of good and harm" during 2015 to 2017. To put it succinctly, South Korea is the only country surveyed where the respondents' opinion about China's influence turned from a net "good" in 2015 to a net "harm" in 2017.

Upon closer inspection there is more to the South Korean respondents' opinion about China. On the one hand there appears to be some recognition about the value of good Sino-ROK bilateral relations. That is, when South Koreans were asked what they thought should be done about relations with China, 50% stated they should be strengthened while 45% also stated that increased trade with China is good for South Korea. Only 21% thought that trade with China is bad.

There also appears to be some recognition that China (45% of respondents), along with the United States (43% of respondents), are "indispensable for Korea's unification." This is not surprising when we factor in South Korean respondents' views about relations between China and North Korea. When South Koreans were asked to identify "the most important reason for the continuation of North Korea's nuclear weapons program," 66% answered that it was because "China is protecting North Korea's nuclear program."

Recognition of China's growing influence in the region is another important factor. Approximately 56% of the respondents stated that China "has already or will eventually replace the U.S. as the world's leading superpower." Although this figure is 7% lower than in 2015, the fact that it remains so high despite the rise in anti-Chinese sentiments shows why South Koreans may have a more cautiously mixed view about China.

Take South Korean respondents' views about Chinese investments in South Korea, for instance where 39% stated that Chinese investment is "bad" and 29% said it is "good." When asked about investments from the United States, 41% thought it is "good" and only 15% said it is "bad." To put these figures in perspective, South Koreans generally do not hold favourable views about foreign investments with only 26% of respondents holding favourable views about foreign investments in South Korean infrastructure (e.g. electricity, water, transport, and communication). Approximately 75% of respondents' views were less than favourable.

Finally, South Koreans generally hold unfavourable views about China's military expansion in the Asia Pacific with 47% of respondents stating that China should "decrease" its military footprint in the region. More South Koreans also view China (29%) as a grave security threat in the region in 2017 after North Korea (44%). This is a marked contrast from the 2015 data when the perception of a threat from China (8%) ranked behind North Korea (51%), Japan (22%), and South Korea (13%).

Korea

The United States

Another important change is the election of the United States President Donald Trump in November 2016. As shown by the latest polls on different leaders in the region, President Trump's approval rating in South Korea is significantly lower than that of his predecessor. There is evidence to suggest that this impression about President Trump may also impact broader South Korean view about the United States. For instance, when asked whether the U.S. influence on South Korea over the next five years is likely to be "positive," "negative," or "neither," approximately 33% of respondents answered "negative." When the question was reframed by priming the respondent with "now that Donald Trump is the new President of the United States" this figure increased to 70%. If we look across age groups, the priming effect was most pronounced for individuals in their 30s and 40s who tend to favour more progressive views than people in other age categories. Finally, 72% of all South Korean respondents stated that they expect the "relationship between the United States and South Korea under the Trump administration" will be "bad."

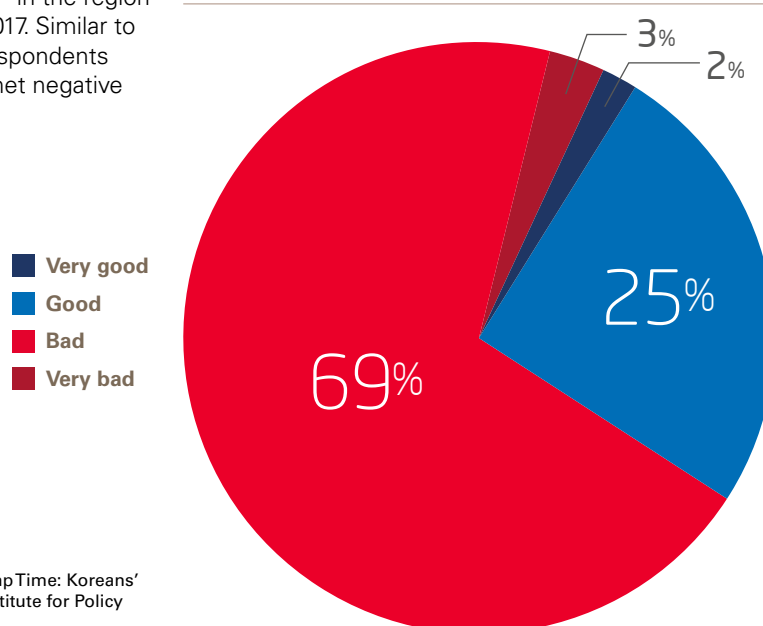
South Koreans also think that the Donald Trump presidency will not be helpful in addressing the North Korean problem. When asked about inter-Korean relations under the Trump administration, 72% of respondents stated that they expected it to be "bad" or "very bad" (Figure 47).

Given the negative outlook, it is not surprising to find that the percentage of respondents who thought the United States did "more harm than good" in the region rose by 13% during the period 2015 to 2017. Similar to the primed question discussed above, respondents in their 30s and 40s showed the largest net negative swing towards "more harm than good."

While positivity about United States influence on South Korea has been more subdued in 2017 as a result of the U.S. presidential election in 2016, South Koreans still maintain feelings of strong affinity towards the United States. As shown in the data about its influence on South Korea, 43% of respondents stated that it is "positive." Although this figure is 12% lower than that of 2015, it is still nearly 20% higher than those who thought the United States' influence on South Korea is "negative."

While South Koreans appear to have some degree of scepticism about the U.S. alliance commitments in the region, but they place a high priority on strengthening the relationship with the United States. When asked to assess the likelihood that the United States would uphold its alliance commitments in the Asia-Pacific region, only 25% of respondents answered "extremely" or "very likely" while 60% said "somewhat likely." When the respondents were asked what should be done about South Korea's relationship with the United States, 50% answered that it should be strengthened, 34% stated that it should remain the same, 48% favoured increasing trade with the United States and 84% were either supportive or indifferent about U.S. investment in South Korea. On the question of increasing U.S. military presence in the Asia-Pacific, 30% supported an increase while 48% voted to maintain the current level. Finally, when asked to name the most pressing issue in South Korea's foreign policy, 34% stated "strengthening the ROK-US alliance."

Figure 47. Outlook on inter-Korean Relations under the Trump Administration



⁵ Kim Jiyoung, Kang Chungku, and John J. Lee. "TrumpTime: Koreans' View of ROK-US Relations." Issue Briefs. The Asan Institute for Policy Studies. January 17, 2017.

Korea

South Korea and Regional Great Power Rivalry

Clearly, South Korean respondents seem to place a high premium on the ROK-US alliance. They also seem to understand the value of cautious-yet-good relations with China. This type of orientation is consistent with South Korea's strategic position in the regional great power rivalry. As noted by G. John Ikenberry, countries like South Korea seek to take advantage of the so-called "dual hierarchy" resulting from the great power competition between China and the United States. Survey data suggests that the South Korean respondents' understanding of this backdrop has not wavered since 2015. When asked what "word best describes the relationship between China and the United States," 54% answered "competitors" followed by 18% saying "fearful" and 15% stating "partners."

North Korea

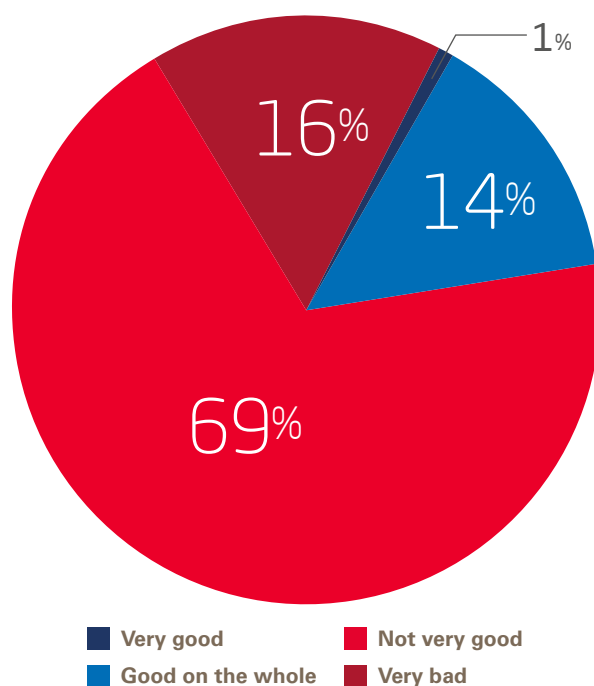
Putting aside South Korea's position in the great power rivalry between China and the United States the most important concern for the South Korean respondents

continues to be North Korea. When asked "what is the most pressing issue for Korea's foreign policy?" 42% stated "improving South-North Korea relations." When asked to assess the current state of South Korea's national security, 85% stated that it was either "not very good" or "very bad" (Figure 48). When those respondents were asked why they thought so, 45% said it was because of the "North Korean threat" while 33% stated that "serious conflict or problems have already happened." When asked more directly what "is the most serious threat to Korea's national security?" 68% answered "North Korea's development of nuclear weapons and military provocations." Similar to the 2015 survey, when asked to name the country most likely to start a conflict in the Asia-Pacific region within the next 10 years, North Korea was rated highest with 44%.

South Korean Politics

One of the defining events in 2016-2017 was the impeachment of President Park Geun-hye. While there is a precedent of presidential impeachment in South Korea, this is the first impeachment that was upheld by the Korean Constitutional Court resulting in President Park's forced removal from office. As a result of this event, the South Korean presidential election was brought forward from December to May 2017. Survey respondents were asked which party candidate they were likely to support in the upcoming election. As expected, 57% expressed their preference for one of the opposition candidates (i.e. progressive Together Democratic Party or the more progressive-leaning moderate People's Party) while 25% were undecided. Only 13% expressed support for one of the conservative parties more closely aligned to the ideologies of President Park.

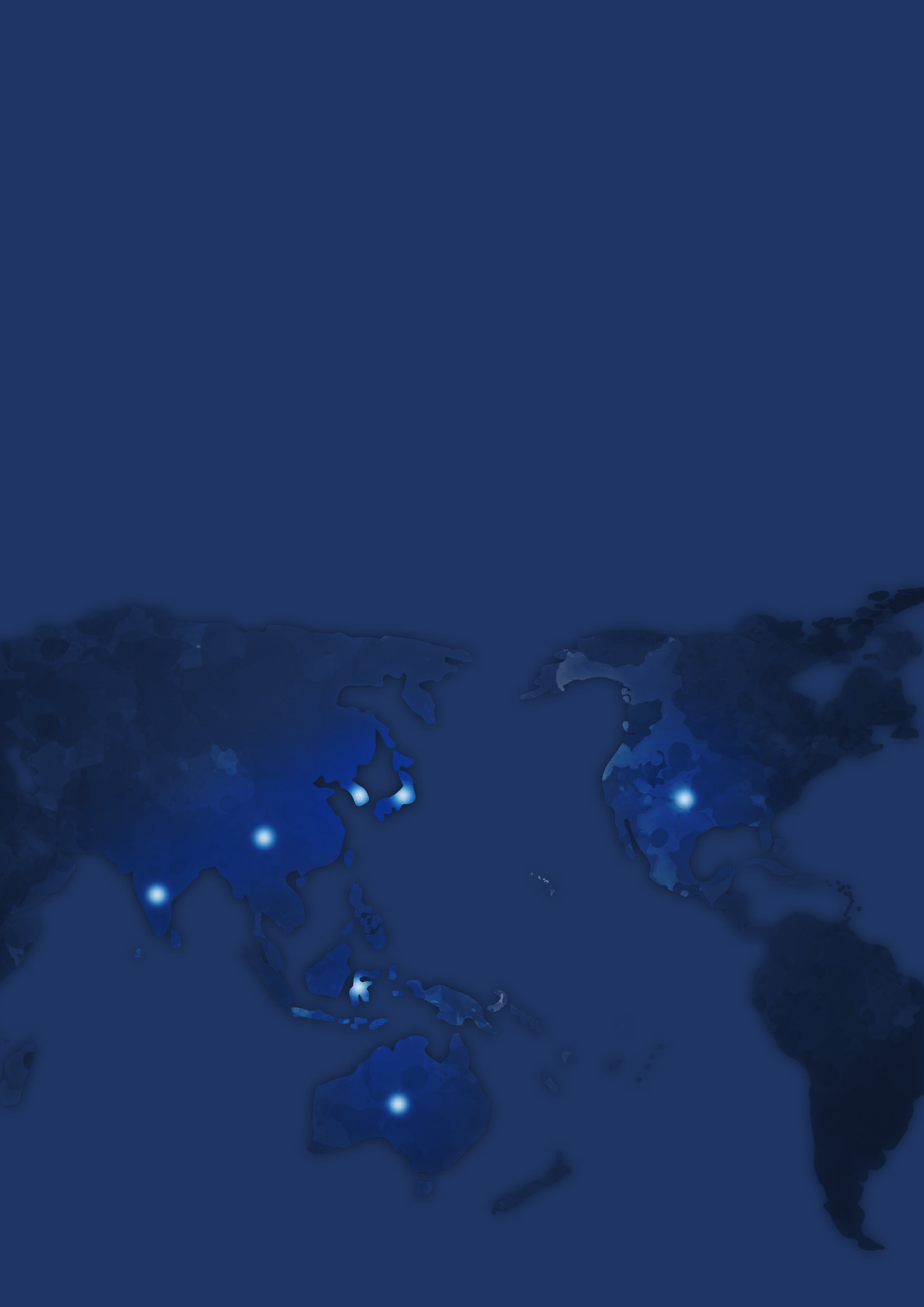
Figure 48. Assessments on the Current State of South Korea's National Security



Discussion

There are marked shifts in the South Korean respondents' opinions related to China and the United States in the aftermath of the U.S. Presidential election and the North Korean nuclear tests in 2016. While the South Korean view about North Korea has remained relatively unchanged, it is unclear how this may evolve as a result of the South Korean election on May 9th and the heightened uncertainty surrounding the Trump presidency's approach to dealing with the North Korean problem. One thing is certain, there is no shortage of anxiety and pessimism surrounding the recent changes in South Korean politics and the regional geopolitical landscape.

⁶ G. John Ikenberry. 2015. "Between the Eagle and the Dragon: America, China, and Middle State Strategies in East Asia," *Political Science Quarterly*, 20(20): 1-35.



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United States Studies Centre

Institute Building (H03),
City Rd,
University of Sydney
NSW 2006
Australia

[✉ us-studies@sydney.edu.au](mailto:us-studies@sydney.edu.au)

[@ +61 2 9351 7249](tel:+61293517249)

[@USSC](https://twitter.com/USSC)

[📌 ussc.edu.au](http://ussc.edu.au)



Perth USAsia Centre

M265, 3rd Floor, Old Economics Building
The University of Western Australia
35 Stirling Highway
Crawley WA 6009
Australia

[✉ perthusasiacentre@uwa.edu.au](mailto:perthusasiacentre@uwa.edu.au)

[@ +61 8 6488 4320](tel:+61864884320)

[@PerthUSAsia](https://twitter.com/PerthUSAsia)

[📌 PerthUSAsia.edu.au](http://PerthUSAsia.edu.au)