



# ASEAN Study

外務省

Ministry of Foreign Affairs of Japan

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31/03/2014

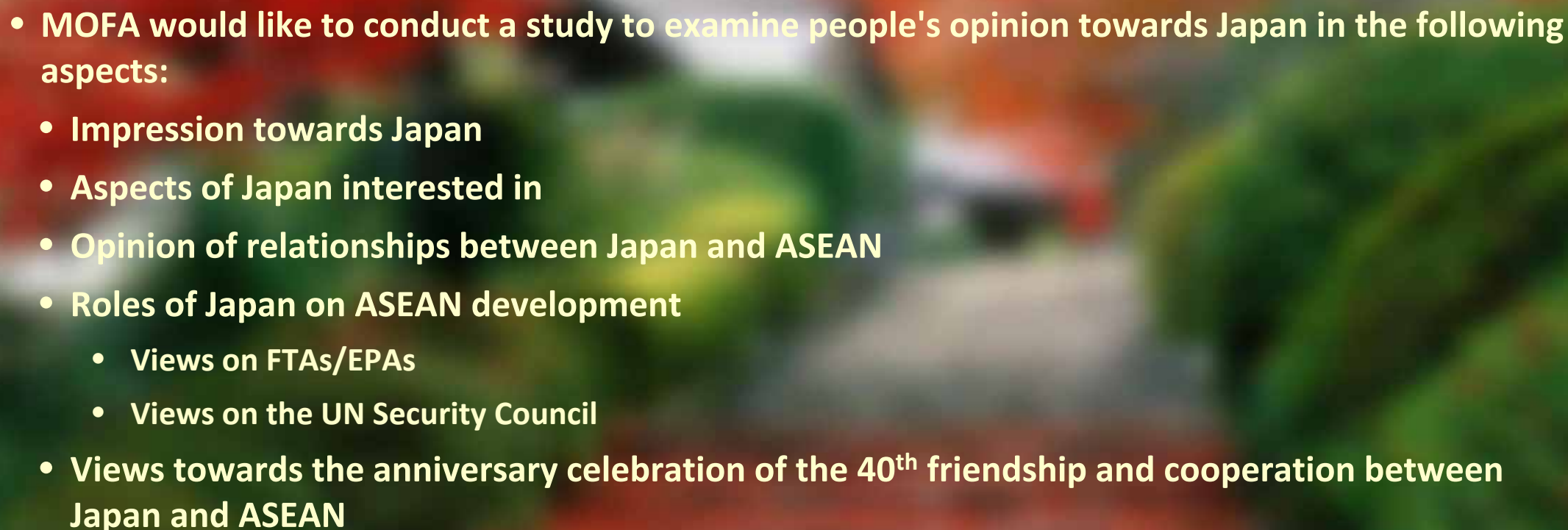
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Research background and objectives	3
Research design	4
Executive summary	7
Key findings	15
Demographics	53



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- **MOFA would like to conduct a study to examine people's opinion towards Japan in the following aspects:**
    - **Impression towards Japan**
    - **Aspects of Japan interested in**
    - **Opinion of relationships between Japan and ASEAN**
    - **Roles of Japan on ASEAN development**
      - **Views on FTAs/EPAs**
      - **Views on the UN Security Council**
    - **Views towards the anniversary celebration of the 40<sup>th</sup> friendship and cooperation between Japan and ASEAN**



## METHODOLOGY

Online panel



## TARGET RESPONDENTS

Age 18+ general population



## FIELDWORK PERIOD

1 March to 16 March, 2014



## SAMPLE SIZE

**Total** **N= 2,144**

Indonesia N= 302

Malaysia N= 317

Myanmar N= 309

Philippines N= 307

Singapore N= 305

Thailand N= 300

Vietnam N= 304



## INTERVIEW LENGTH

Average of 10 minutes



## WEIGHTING

Age x Gender adjustment based on  
population figures



## SOFT QUOTAS

At least 40% for each gender

*For all markets except Vietnam, Indonesia and Myanmar:*

At least 15% aged 50+

*For Vietnam and Indonesia:*

At least 10% for aged 40-49 and at least 5% for age 50+

*For Myanmar:*

At least 5% for aged 40-49 and at least 1% for age 50+

Maximum of 40% non working for Indonesia, Philippines, Vietnam and Myanmar, and 30% for the rest of markets

At least 20% for each of high, mid and low income

*For Malaysia:*

At least 25% for Chinese, 60% for Malay



## LANGUAGE USED

	Language(s)
<b>Indonesia</b>	English, Bahasa Indonesia
<b>Malaysia</b>	English, Chinese and Bahasa Malaysia
<b>Myanmar</b>	English, Burmese
<b>Philippines</b>	English
<b>Singapore</b>	English
<b>Thailand</b>	English, Thai
<b>Vietnam</b>	English, Vietnamese



# Executive summary








## Impression towards Japan

Japan was rated as the most reliable country across the monitored markets. All interviewed countries shared the same view except for The Philippines and Singapore. Filipinos referred to America as the most reliable country while Singaporeans rated Japan and America to be equally reliable.

Over 90% indicated that there was a friendly relationship between the interviewed countries and Japan. Myanmar's top-2-box friendliness score (88%) was contributed mostly by the "somewhat friendly" answer (66%). Over half (57%) were in agreement with Japan's trustworthiness; Singapore was the market least agreed with other markets in this aspect where only 36% agreed. Indonesia (71%) trusted Japan the most, followed by Vietnam (65%).

Japan is highly regarded as a technologically advanced country (81%), followed by being economically advanced (62%) and with beautiful natural scenery (62%). The Philippines, Singapore, Thailand and Vietnam also associated Japan as a country in rich culture.







## Aspects of Japan of interest

Science/technology, way of life/way of thinking and foods culture were the top three aspects people across ASEAN markets showed interest in knowing more about Japan. All countries but Myanmar, Singapore and Thailand rated science/technology as the top subject of interest. Burmese were most interested in learning the Japanese way of living and thinking while Singaporeans and Thais saw foods culture as a top priority. Comics/animation was one of the aspects that Indonesians wanted to explore more. Singaporeans and Thais also wanted to explore more with Japan's traditional culture/arts. In addition, Burmese also looked for economic and technical cooperation while Vietnamese would like to learn more about business development.

One-tenth have already studied Japanese, with students coming mainly from Indonesia (18%) and Thailand (13%). Indonesians showed the highest interest in learning Japanese with half indicating that they had either studied or would love to study the language. The key reasons for studying Japanese were its applications when travelling to Japan (62%) while half expressed that they simply liked Japanese culture.



## Aspects of Japan of interest (cont'd)

Over 80% relied on the Internet as the main source for obtaining information on Japan, followed by newspapers/ magazines/ books (63%) and TV/radio (52%). Perhaps due to the fact that its IT infrastructure is still under development, Burmese relied less on the internet (55%) and instead treated cinema and TV/radio as equally important sources. Thais liked to source more from TV/radio (61%) than newspapers/ magazines/books (55%).





## Opinion of relationships between Japan and ASEAN

Japan (65%) was considered the most important current partner for ASEAN countries, followed by China (48%) and America (47%). All countries rated Japan as the most important partner except for Myanmar and Singapore. Myanmar rated America (48% vs. 44% for Japan) as the most important current partner while Singapore rated China (60% vs. 50% for Japan). Japan also was considered the most important future partner—though the number of mentions was slightly less than that for current partnership (60% vs. 65% for current partnership). The 2<sup>nd</sup> and 3<sup>rd</sup> runner up positions were also held by China (43%) and America (40%). Singaporeans would see China (51%) as the most important future partner which was much higher than that for Japan (39%).

Almost 80% rated science and technology as the top area for strengthening cooperative relations, followed by trade investment (72%) and global environmental issues (62%). Indonesians and Vietnamese looked for more cooperation in energy while Thais wanted to strengthen relations in tourism.





## Roles of Japan on developing ASEAN

Overall speaking, Japan was well perceived by ASEAN countries as actively developing Asia (over 90%) except for Singapore where only three quarters agreed the same and 17% indicated that Japan was not very active. Almost 90% said that Japan's economic and technical cooperation was helpful in the development of their country. Again, Singapore reported the lowest mentions (76%) in this regard while Vietnam provided the highest rating (98%). 95% welcomed Japanese companies to expand into ASEAN markets. 85% of Filipinos strongly welcomed Japanese companies' expansion into ASEAN markets, followed by Vietnamese at 74%.

Over three quarters looked for Japan to contribute more in terms of economic and technical cooperation (77%), followed by trade promotion and private investment (67%). Economic and technical cooperation topped the list of items that ASEAN countries thought Japan could contribute more. Singaporeans saw economic/technical cooperation and culture exchanges being equally important while Indonesians wanted more support on culture exchanges instead of global environment protection.



## Roles of Japan on developing ASEAN (cont'd)

- Views on FTAs/EPAs

61% were aware of FTAs/EPAs negotiations between Japan and ASEAN. Vietnam (80%) was the market with the highest awareness of the negotiations, followed by Thailand (78%) and Indonesia (73%). Two thirds looked for the strengthening of ties between Japan and ASEAN (not only in the economic field), followed by investment expansion (63%) and economic structure's improvement/development (63%) among ASEAN member countries. Singapore and Thailand were more into investment/trade expansion while Indonesia, Malaysia and Philippines looked for economic structure's improvement/development.

- Views on the UN Security Council

68% were aware of the functions of the UN Security Council with highest awareness being reported by Indonesia (86%). Over 80% agreed that Japan should be a standing member with the highest support coming from Vietnam (91%). Almost 90% indicated that the policy was valuable. Two thirds of Indonesians, Filipinos and Vietnamese rated the policy being very valuable while Singaporeans rated it with the least value.





## View towards anniversary celebration of the 40th friendship and cooperation between Japan and ASEAN

98% indicated that organizing anniversary events would be valuable. Exhibitions (63%) were the event with top interest which people had either attended or would like to attend, following by events about Japanese traditional culture and theatrical performances (56%). All countries chose exhibitions to be the top event except for Vietnam where events about Japanese traditional culture and theatrical performances were more preferred (67%).



## Key Findings





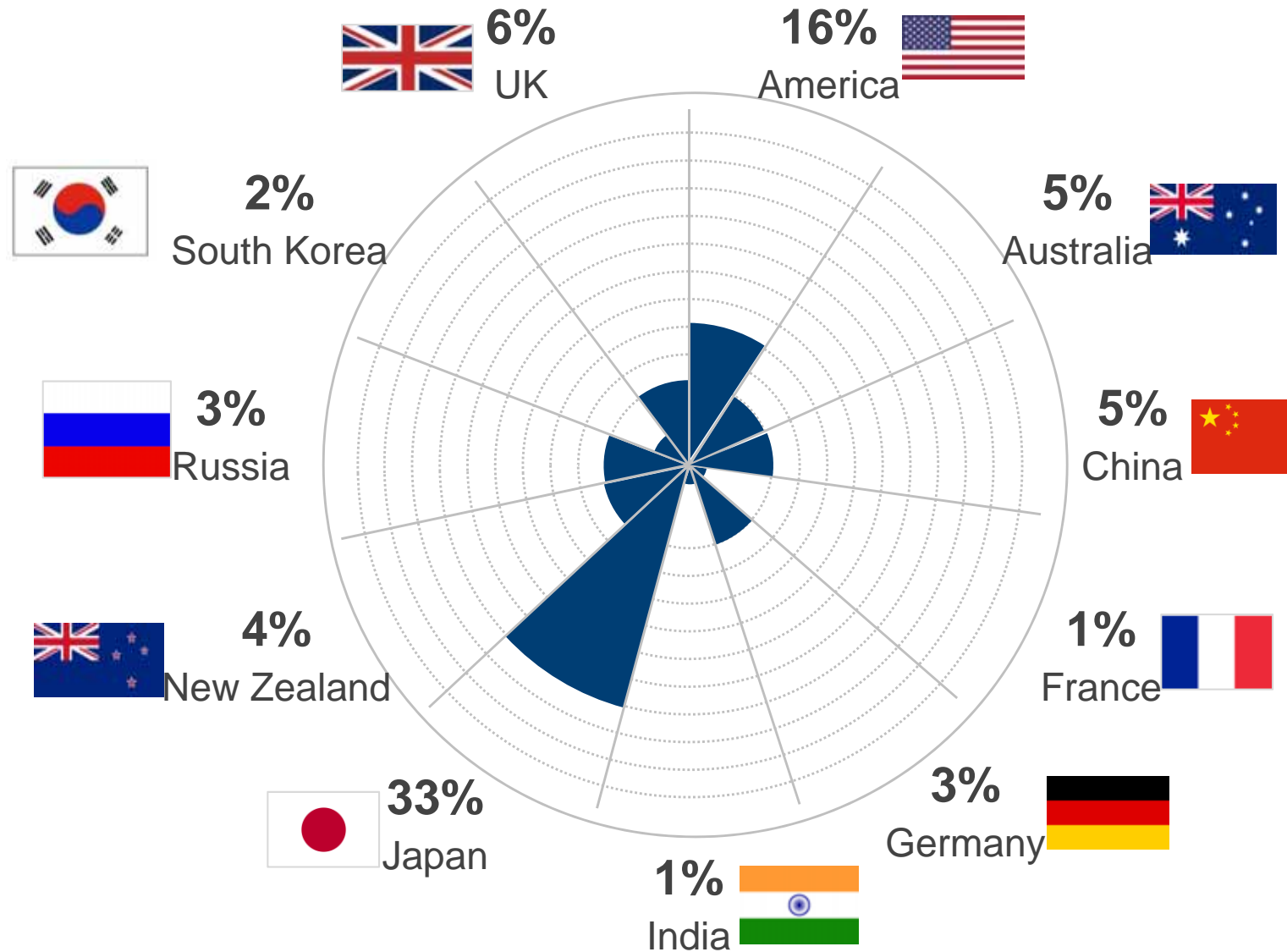
# Impression towards Japan





# Overall, Japan was rated as the most reliable country amongst all 11 monitored markets.

## Most reliable country (%)



Scale: 5% per line

Q8. Which of the following country is the most reliable? Please choose one answer from the following list

Base: All respondents (N=2,144);

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Japan was rated the most reliable country by all markets except The Philippines and Singapore. Filipinos indicated America to be the most reliable country while Singaporeans rated Japan and America to be equally reliable.

Most reliable country (%)

	Indonesia	Malaysia	Myanmar	Philippines	Singapore	Thailand	Vietnam
America	14	3	15	41	13	17	8
Australia	1	7	1	6	10	4	9
China	5	8	12	2	1	8	2
France	-	1	-	1	-	1	2
Germany	7	3	-	3	5	2	2
India	-	1	-	-	1	1	1
Japan	47	30	29	31	13	35	46
New Zealand	2	8	-	1	10	6	-
Russia	3	-	1	-	-	1	16
South Korea	3	4	1	3	3	2	-
UK	7	9	1	6	6	6	4

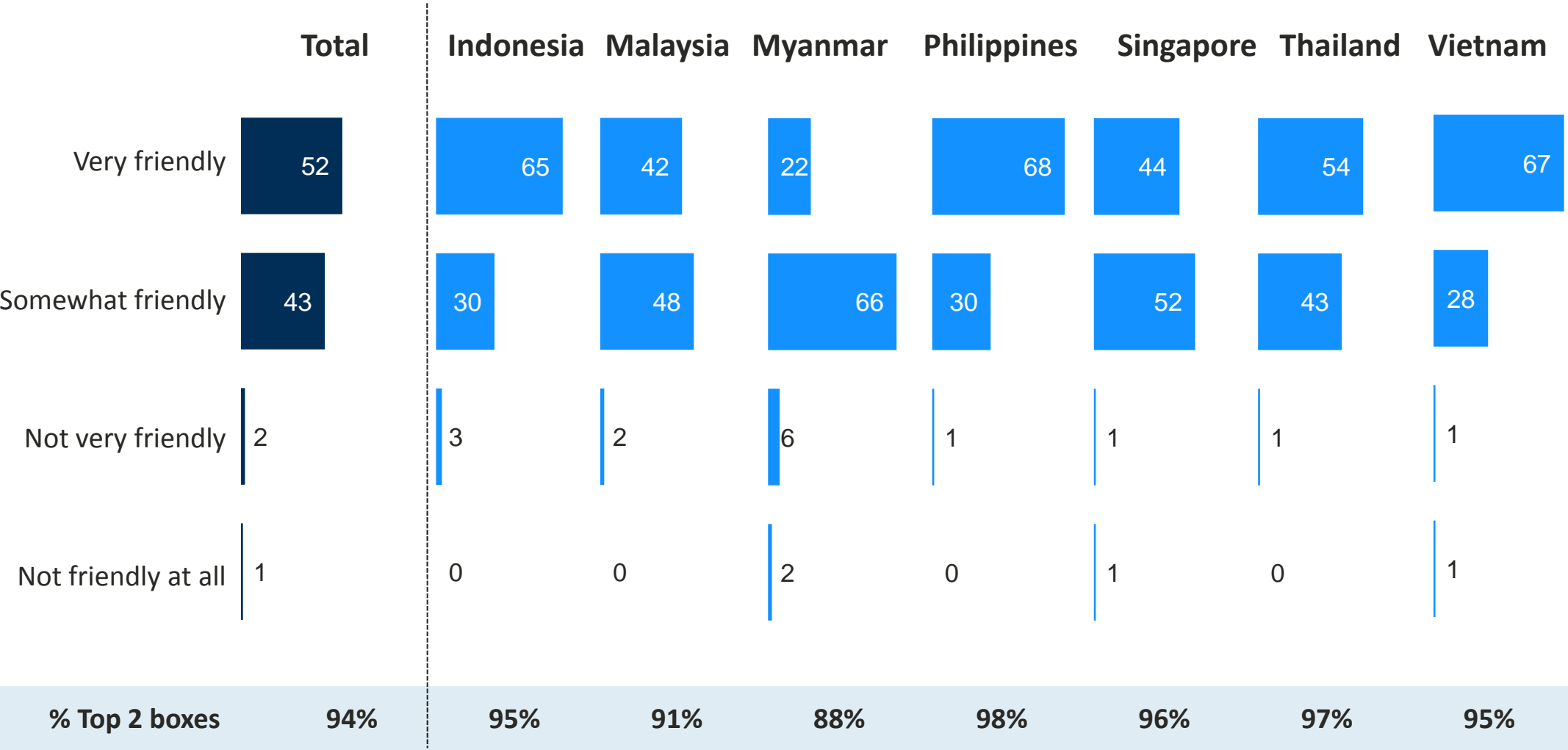
Q8. Which of the following country is the most reliable? Please choose one answer from the following list.

Base: Indonesia (N=302); Malaysia (N=317); Myanmar (N=309); Philippines (N=307); Singapore (N=305); Thailand(N=300); Vietnam(N=304)



Over 9 out of 10 indicated the existence of a friendly relationship between their country and Japan. Burmese's top-2-box friendly score was mostly contributed by the "somewhat friendly" answer (66%).

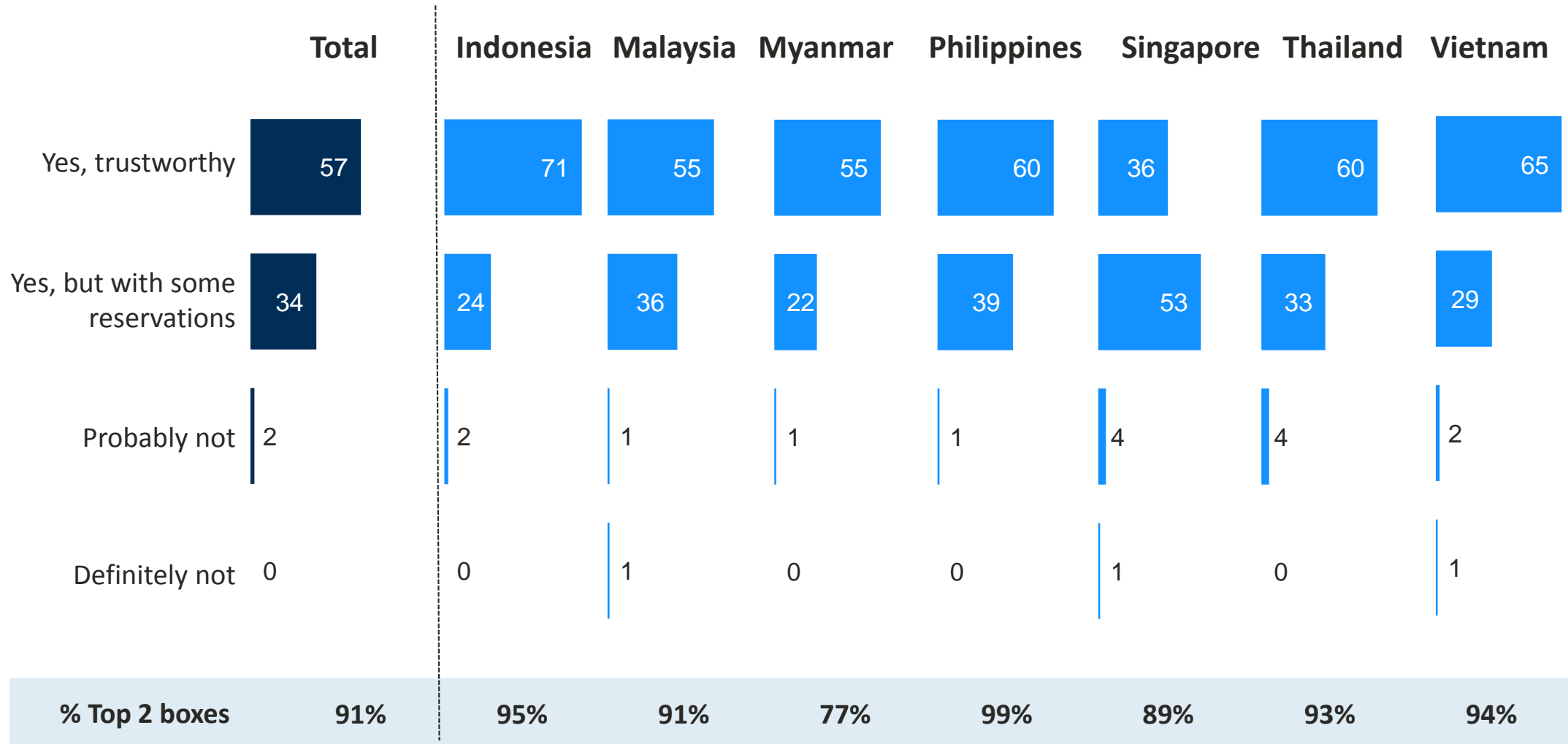
Relationship between your country and Japan (%)



Q6. How do you think about the current state of relationships between your country and Japan?  
Base: All respondents (N=2,144); Indonesia (N=302); Malaysia (N=317); Myanmar (N=309); Philippines (N=307); Singapore (N=305); Thailand(N=300); Vietnam(N=304)  
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**Overall, more than half (57%) agreed that Japan was trustworthy and Indonesia was the market that trusted Japan the most; Singapore had the least belief in Japan's trustworthiness (36%).**

Trustworthiness of Japan (%)



Q7. Do you think Japan is a trustworthy friend for your country?

Base: All respondents (N=2,144); Indonesia (N=302); Malaysia (N=317); Myanmar (N=309); Philippines (N=307); Singapore (N=305); Thailand(N=300); Vietnam(N=304)



**Over 80% saw Japan as a technologically advanced country, with follow up attributes being economically advanced and with beautiful natural scenery.**

Impressions of Japan (%)

81%

A technologically-advanced country



62%

An economically-advanced country



62%

A country with beautiful natural scenery



Q1. What are your impressions of Japan? Choose multiple answers from the following list.

Base: All respondents (N=2,144)

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# Being technologically advanced was the top impression of all countries towards Japan. The Philippines, Singapore, Thailand and Vietnam also believed Japan was a country in rich culture.

## *Impressions of Japan (%)*

	Total	Indonesia	Malaysia	Myanmar	Philippines	Singapore	Thailand	Vietnam
A technologically-advanced country	81	77	88	78	85	78	80	79
An economically-advanced country	62	62	68	54	78	54	58	57
A country with beautiful natural scenery	62	60	66	29	68	78	67	66
A country in rich culture	59	58	64	25	69	78	60	60
A country which transmits/spreads anime/fashion/culinary and other contemporary cultures around the world	44	45	50	10	60	55	55	32
A peaceful country	35	34	42	19	48	33	31	38
A country with a cool image	35	40	42	15	37	29	41	43
A democratic country	18	12	21	13	22	21	21	19
A country concerned with only its own economic growth and profits	16	19	21	3	14	20	21	15
A country oriented towards Europe and America	9	11	9	1	10	9	9	15
A country whose people are difficult to understand	6	4	3	-	6	11	9	8
A country which is difficult to understand	5	3	4	1	5	10	8	4
A warlike country	4	4	3	-	3	6	5	4

Q1. What are your impressions of Japan? Choose multiple answers from the following list.

Base: All respondents (N=2,144); Indonesia (N=302); Malaysia (N=317); Myanmar (N=309); Philippines (N=307); Singapore (N=305); Thailand(N=300); Vietnam(N=304)



# Aspects of Japan to Learn More About

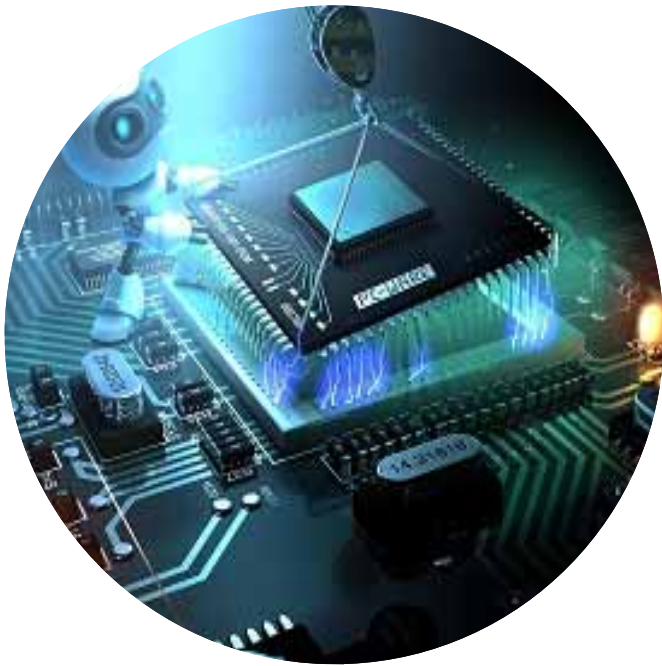


The top three aspects of Japan which other markets expressed interest in knowing more were science/technology, way of life/way of thinking and food culture.

*Aspects of Japan interested to know more (%)*

58%

Science/Technology



56%

Way of life/Way of thinking



53%

Foods Culture



Q2. Which aspects of Japan you would like to know more about? Choose multiple answers from the following list.

Base: All respondents (N=2,144)

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# Science/technology was the top interest except for Myanmar, Singapore and Thailand. Most Burmese were interested in Japan's way of life/thinking while Singaporeans and Thais rated foods culture as top interest.

## Aspects of Japan interested to know more (%)

	Total	Indonesia	Malaysia	Myanmar	Philippines	Singapore	Thailand	Vietnam
Science/Technology	58	63	65	40	72	45	53	64
Way of life/Way of thinking	56	48	64	52	68	56	49	52
Foods Culture	53	52	54	12	63	71	60	62
Traditional Culture/Arts	47	50	50	21	55	52	49	50
Economy	39	43	38	26	49	28	34	53
Business development	37	36	38	26	50	23	32	54
Economic and technical cooperation (Official Development Assistance-ODA)	31	36	27	37	41	13	26	39
Comics/Animation	31	52	32	3	34	28	37	33
History/Literatures	31	35	27	15	48	31	31	31
Martial arts including Karate, Judo and Kendo	27	44	30	7	36	19	27	27
Dramas and films	23	37	24	3	21	24	24	28
Politics, foreign policy	19	20	16	17	21	17	14	26
Pop music, idols	18	33	15	2	19	19	16	20
Sports	14	27	11	5	16	7	14	21

Q2. Which aspects of Japan you would like to know more about? Choose multiple answers from the following list.

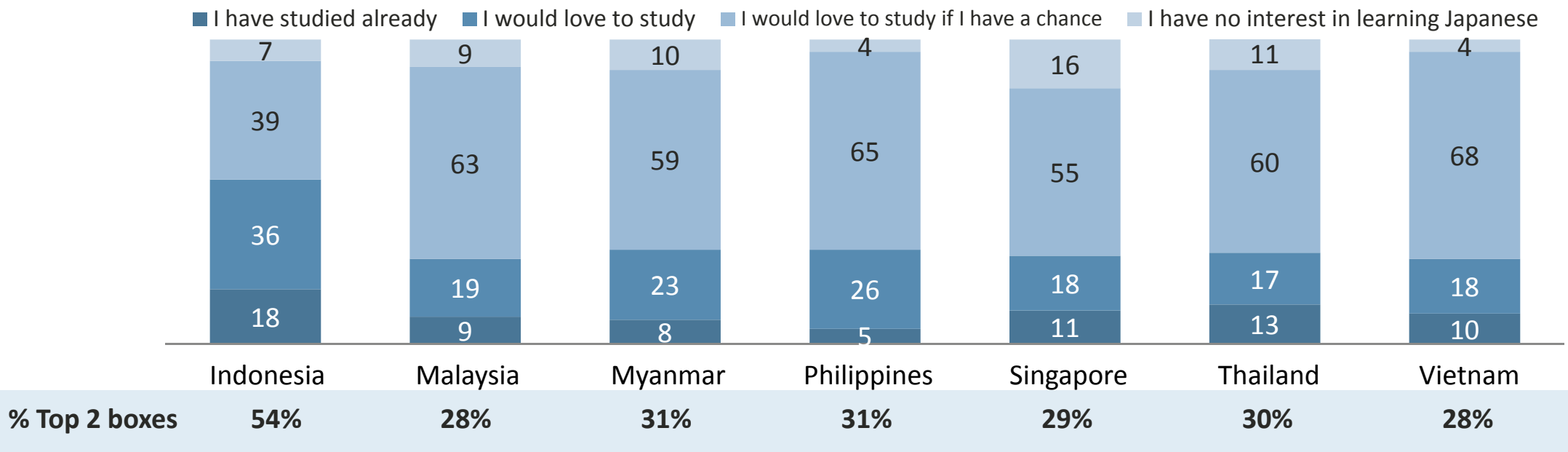
Base: All respondents (N=2,144); Indonesia (N=302); Malaysia (N=317); Myanmar (N=309); Philippines (N=307); Singapore (N=305); Thailand(N=300); Vietnam(N=304)

Over one-tenth have already studied Japanese, with Indonesia (18%) and Thailand (13%) being the top 2 contributing markets. Over half of Indonesians indeed had either studied or would love to study Japanese.

Likelihood to learn Japanese (%)

11%

Already studied Japanese



Q4. Would you like to learn Japanese language?  
Base: All respondents (N=2,144); Indonesia (N=302); Malaysia (N=317); Myanmar (N=309); Philippines (N=307); Singapore (N=305); Thailand(N=300); Vietnam(N=304)  
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# Visiting Japan was the top reason for learning Japanese, followed by the interest in Japanese culture.

## Reasons for learning Japanese (%)

62% I would like to go to Japan

51%  
I like Japanese  
culture

45%  
I would love to  
enjoy/understand  
Japanese contents  
(Manga, Anime and Dramas)

28%  
It is useful for my  
job



Q5. What are your motive to learn Japanese? Choose multiple answers from the following list.

Base: Those interested in learning Japanese - Total (N=1,957);

**Even though visiting Japan was the top reason for learning Japanese across countries, there were one third of respondents in Myanmar, Thailand and Vietnam who indicated that learning the language would be useful for their job.**

Reasons for learning Japanese (%)

	Indonesia	Malaysia	Myanmar	Philippines	Singapore	Thailand	Vietnam
I would like to go to Japan	59	64	47	70	62	66	67
I like Japanese Culture	54	45	27	55	57	56	62
I would love to enjoy/understand Japanese contents such as Manga, Anime and Dramas	52	51	15	54	52	53	40
It is useful for my job	24	24	34	24	19	36	32

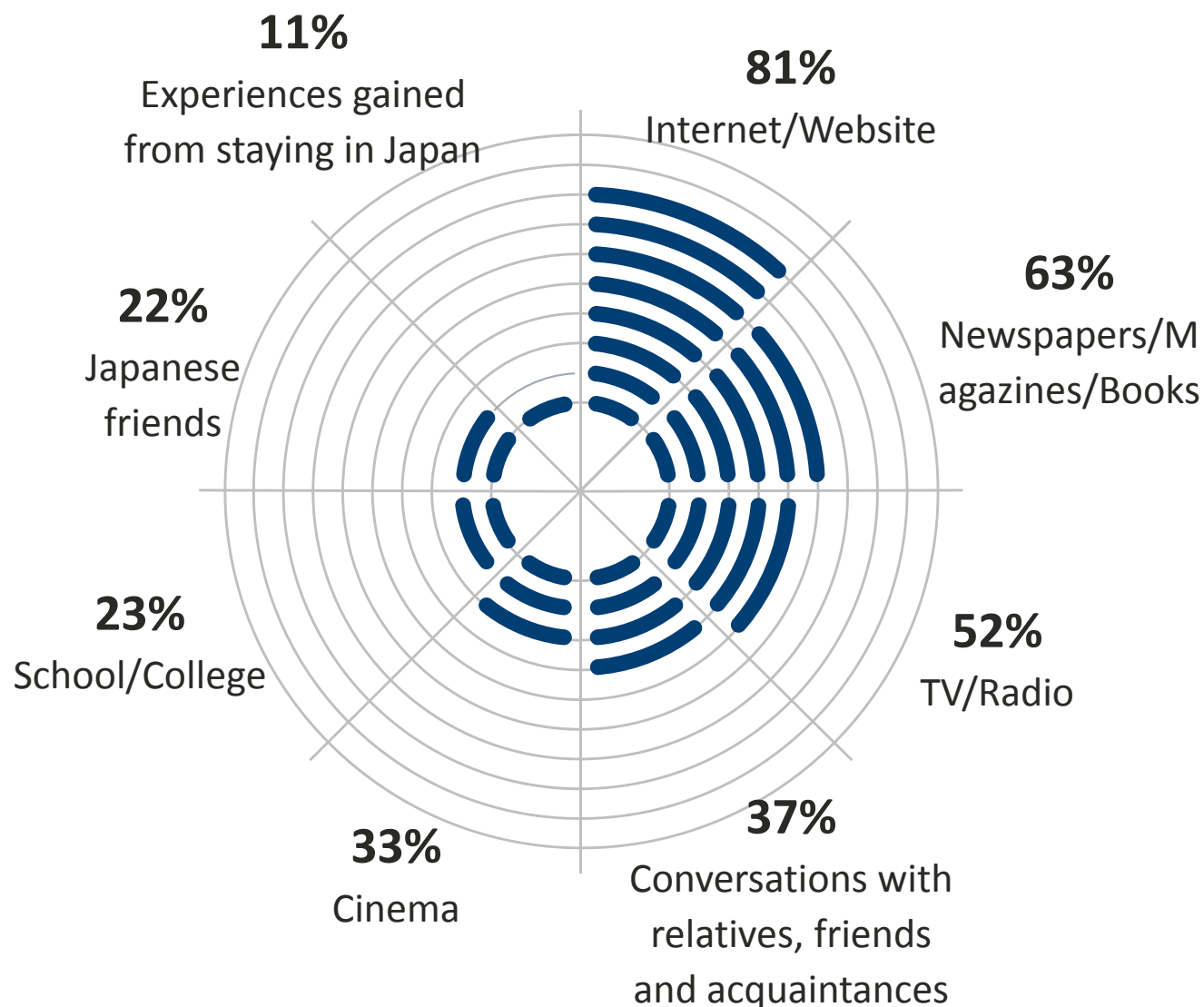
Q5. What are your motive to learn Japanese? Choose multiple answers from the following list.

Base: Those interested in learning Japanese - Indonesia (N=280); Malaysia (N=287); Myanmar (N=278); Philippines (N=295); Singapore (N=256); Thailand(N=268); Vietnam(N=293)



# Over 80% relied on the internet for obtaining Japan's information, followed by print and TV/radio.

## Source of obtaining information about Japan (%)



Q3. What are your information sources about Japan? Choose multiple answers from the following list

Base: All respondents (N=2,144);

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**The internet was the top source for obtaining Japanese information across all countries. Burmese had less reliance on the internet (55%) and considered cinema and TV/radio to be equally important sources. Thais liked to source more from TV/radio than print.**

Source of obtaining information about Japan (%)

	Indonesia	Malaysia	Myanmar	Philippines	Singapore	Thailand	Vietnam
Internet/Website	81	90	55	89	84	84	84
Newspapers/Magazines/Books	64	72	49	64	69	55	67
TV/Radio	56	55	29	57	52	61	51
Conversations with relatives, friends and acquaintances	40	39	24	54	36	33	29
Cinema	51	20	29	36	23	22	49
School/College	25	20	12	38	11	21	33
Japanese friends	29	18	6	23	27	25	27
Experiences gained from staying in Japan	12	8	4	8	23	14	9

Q3. What are your information sources about Japan? Choose multiple answers from the following list

Base: Indonesia (N=302); Malaysia (N=317); Myanmar (N=309); Philippines (N=307); Singapore (N=305); Thailand(N=300); Vietnam(N=304)

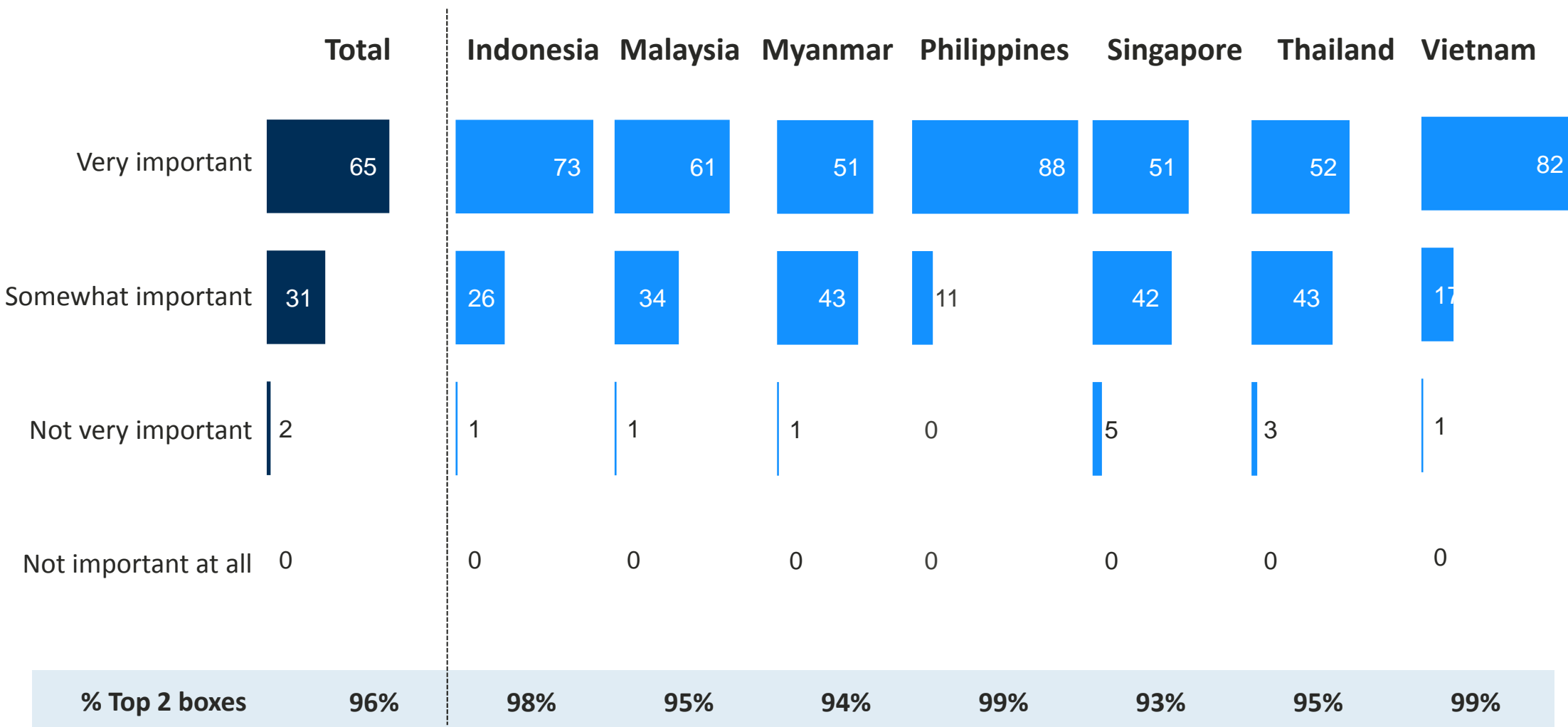


# Opinion of Relationship between Japan and ASEAN



**96% reported that it would be important to have a friendly relationship between Japan and ASEAN. The Philippines agreed to this the most—with 88% indicating very important to do so, followed by Vietnam (82%).**

*Importance of friendly relationship with Japan for ASEAN region (%)*



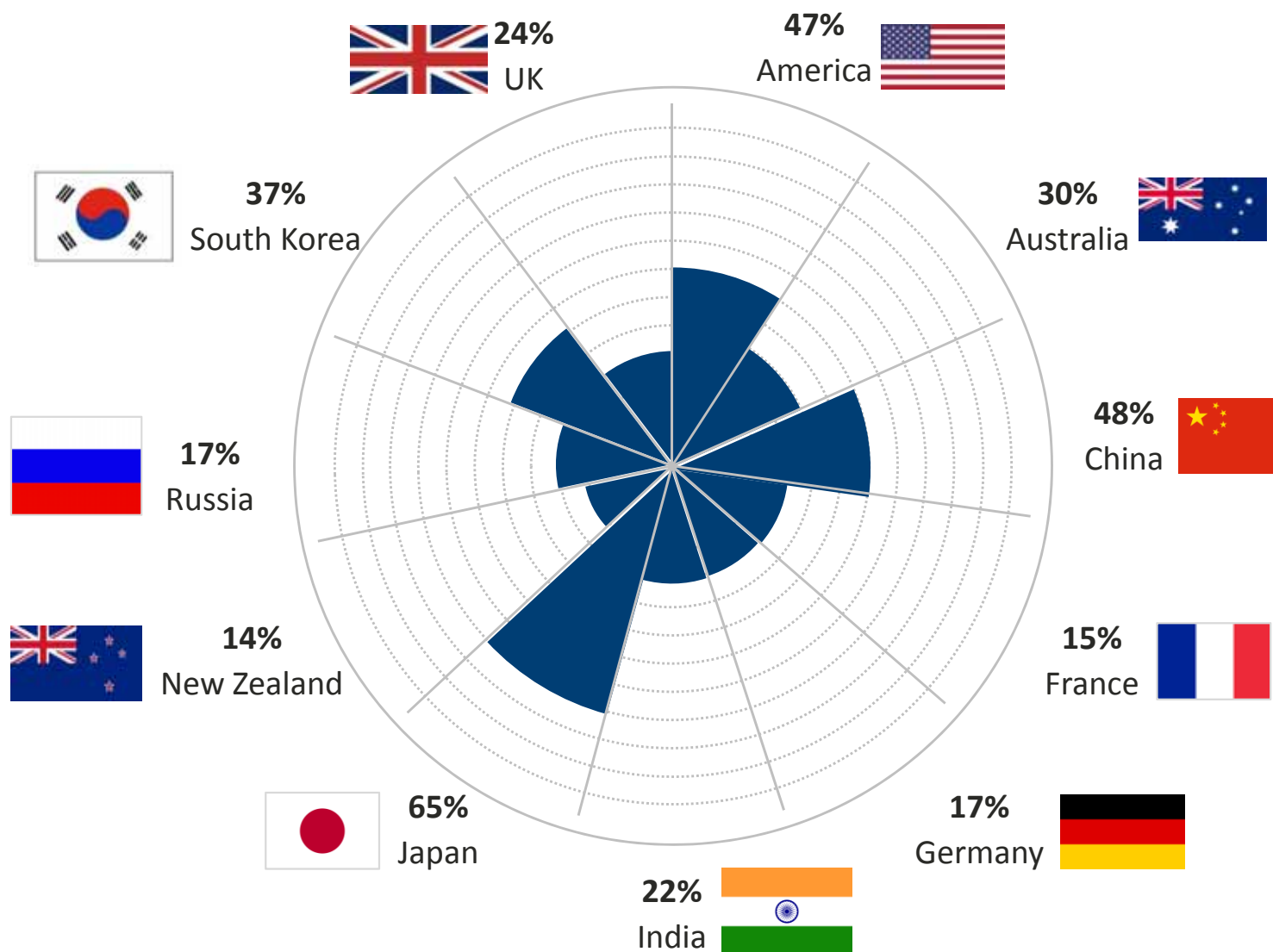
Q18. Do you think the friendly relation with Japan is important for ASEAN (Association of Southeast Asian Nations) region?

Base: All respondents (N=2,144); Indonesia (N=302); Malaysia (N=317); Myanmar (N=309); Philippines (N=307); Singapore (N=305); Thailand(N=300); Vietnam(N=304)



**Japan (65%) was considered the most important partner for ASEAN currently, followed by China (48%) and America (47%).**

Important current partner for ASEAN (%)



Scale: 10% per line

Q20. Which of the following countries are currently considered as an important partner for ASEAN (Association of Southeast Asian Nations)? Choose multiple answers from the following list.

Base: All respondents (N=2,144);

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**Japan was rated the most important current partner except for Myanmar and Singapore. Myanmar rated America (48% vs. 44% for Japan) as the most important partner while Singapore rated China the highest (60% vs. 50% for Japan).**

Important current partner for ASEAN (%)

	Indonesia	Malaysia	Myanmar	Philippines	Singapore	Thailand	Vietnam
America	43	36	48	65	42	38	54
Australia	29	37	11	45	38	19	34
China	52	63	40	32	60	60	32
France	12	14	4	22	15	15	21
Germany	25	19	4	21	17	12	19
India	19	25	16	18	31	22	24
Japan	70	65	44	76	50	74	77
New Zealand	8	16	2	26	20	11	12
Russia	18	13	9	14	10	11	44
South Korea	36	44	20	54	43	29	34
UK	24	28	9	40	24	16	24

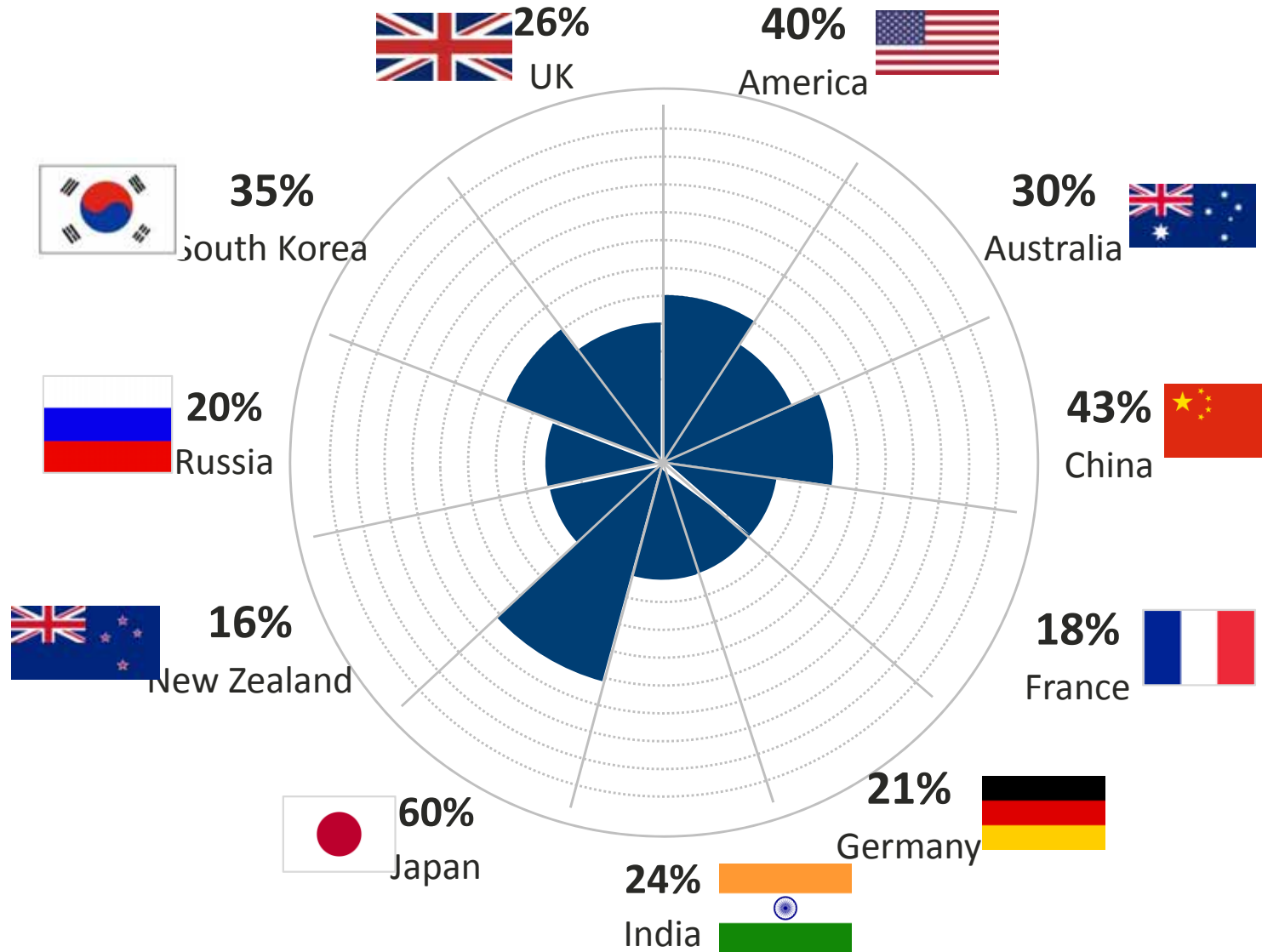
Q20. Which of the following countries are currently considered as an important partner for ASEAN (Association of Southeast Asian Nations)? Choose multiple answers from the following list.

Base: Indonesia (N=302); Malaysia (N=317); Myanmar (N=309); Philippines (N=307); Singapore (N=305); Thailand(N=300); Vietnam(N=304)



# Japan (60%) was rated as the most important future partner for ASEAN, followed by China (43%) and America (40%).

## Important future partner for ASEAN (%)



Scale: 10% per line

Q21. Which of the following countries would be considered as an important partner for ASEAN (Association of Southeast Asian Nations) in the future? Choose multiple answers from the following list. .

Base: All respondents (N=2,144);

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# All countries rated Japan as the most important future partner except for Singapore which indicated that China would be the most important (51% vs. 39% for Japan).

## Important future partner for ASEAN (%)

	Indonesia	Malaysia	Myanmar	Philippines	Singapore	Thailand	Vietnam
America	35	30	41	56	36	31	51
Australia	31	36	12	46	36	17	31
China	48	56	32	25	51	56	30
France	15	16	4	32	19	14	23
Germany	27	24	5	37	21	14	19
India	21	27	16	21	35	21	27
Japan	66	62	49	64	39	68	71
New Zealand	7	25	3	31	20	10	17
Russia	22	21	4	24	17	12	38
South Korea	38	43	20	43	34	25	39
UK	24	30	11	45	29	19	26

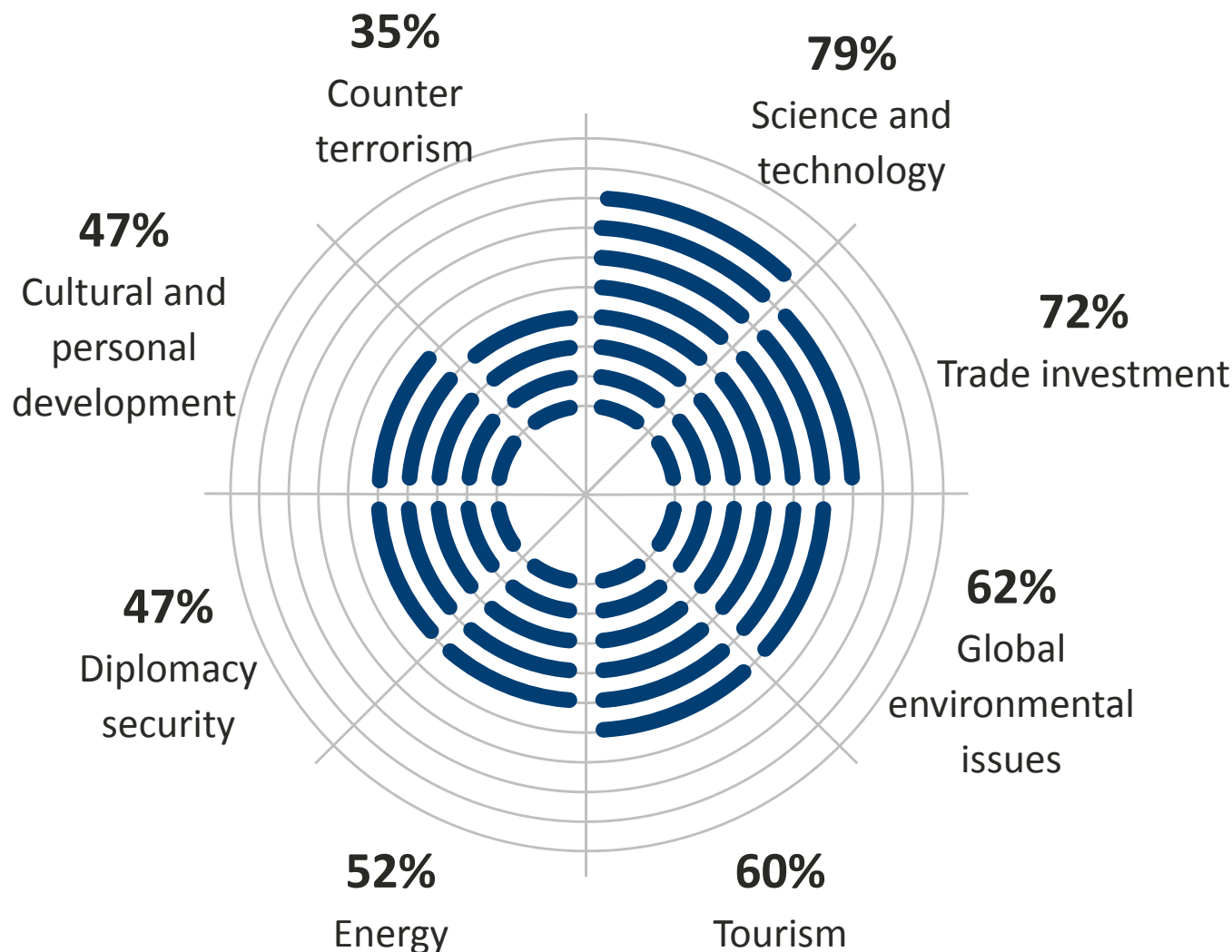
Q21. Which of the following countries would be considered as an important partner for ASEAN (Association of Southeast Asian Nations) in the future? Choose multiple answers from the following list. .

Base: Indonesia (N=302); Malaysia (N=317); Myanmar (N=309); Philippines (N=307); Singapore (N=305); Thailand(N=300); Vietnam(N=304)



**Science and technology (79%) was the top area for strengthening cooperative relations, followed by trade investment (72%) and global environmental issues (62%).**

*Areas of cooperative relations to be strengthened between Japan and ASEAN (%)*



Q19. In which areas should Japan and ASEAN (Association of Southeast Asian Nations) strengthen their cooperative relations?

Base: All respondents (N=2,144);

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# Indonesians and Vietnamese also looked for cooperation in energy while Thais wanted to strengthen cooperative relations in tourism.

## Areas of cooperative relations to be strengthened between Japan and ASEAN (%)

	Indonesia	Malaysia	Myanmar	Philippines	Singapore	Thailand	Vietnam
Science and technology	82	87	71	85	66	79	80
Trade investment	66	74	65	82	72	78	70
Global environmental issues	58	72	40	76	69	59	61
Tourism	58	68	37	64	60	73	58
Energy	60	54	29	57	46	53	64
Diplomacy security	44	50	25	53	57	48	50
Cultural and personal development	51	50	23	50	50	47	60
Counter terrorism	29	41	16	49	44	36	32

Q19. In which areas should Japan and ASEAN (Association of Southeast Asian Nations) strengthen their cooperative relations?

Base: Indonesia (N=302); Malaysia (N=317); Myanmar (N=309); Philippines (N=307); Singapore (N=305); Thailand(N=300); Vietnam(N=304)

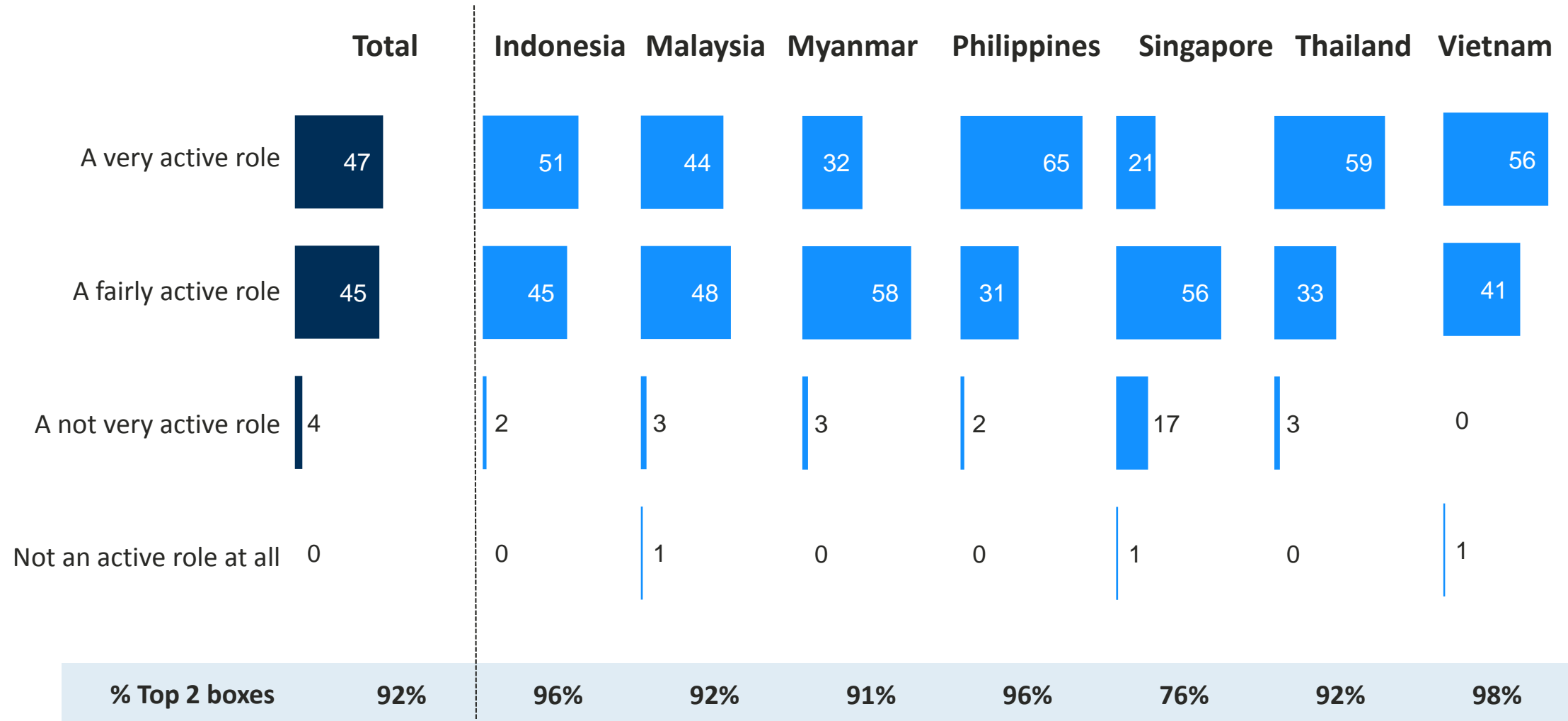


# Roles of Japan on ASEAN Development



**Over 90% believed Japan was playing an active role in developing Asia except for Singapore where only three quarters agreed on the same and 17% indicated that Japan was not very active.**

*Role of Japan in the development of Asia (%)*

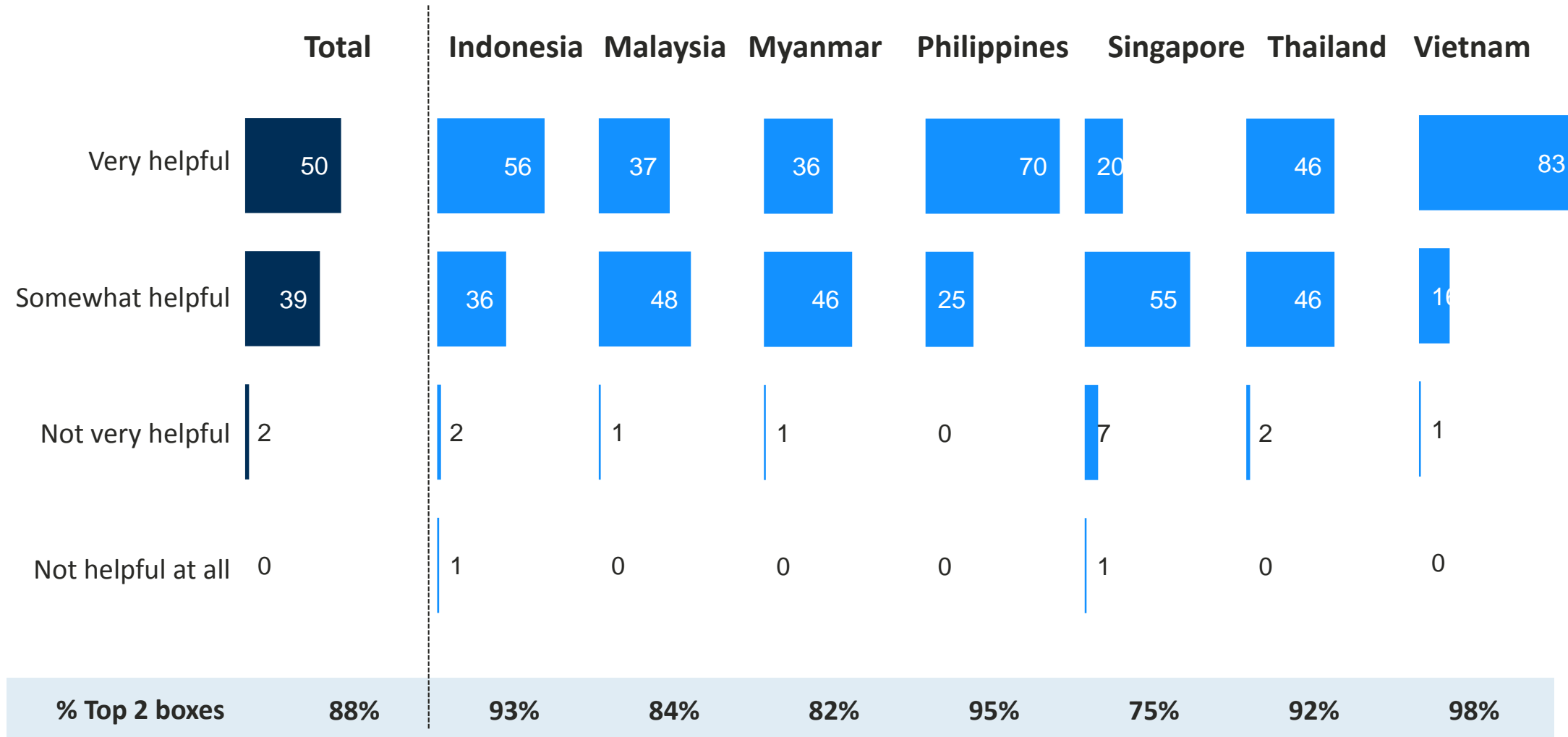


Q11. Do you think that Japan, as a part of Asian society, is playing an active role in the development of Asia?

Base: All respondents (N=2,144); Indonesia (N=302); Malaysia (N=317); Myanmar (N=309); Philippines (N=307); Singapore (N=305); Thailand(N=300); Vietnam(N=304)

**Almost 90% said Japan's economic and technical cooperation was helpful in the development of their country. Vietnam was nearly in full agreement with this (98%) while Singapore reported the lowest mention (75%) of helpfulness.**

*Helpfulness of Japan's economic and technical cooperation in developing your country (%)*



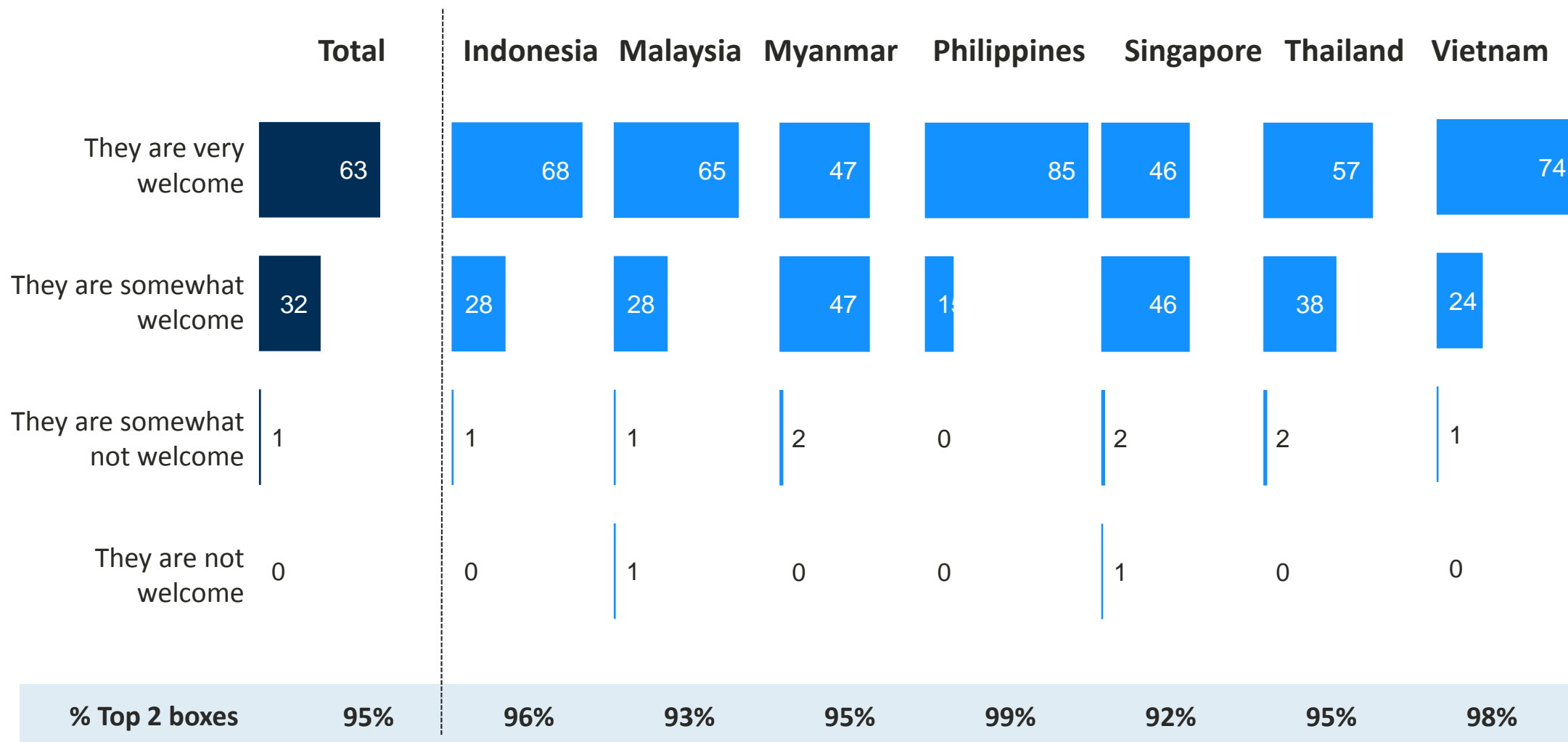
Q9. To what extent do you think Japan's economic and technical cooperation (such as Official Development Assistance – ODA) is helpful in the development of your country?

Base: All respondents (N=2,144); Indonesia (N=302); Malaysia (N=317); Myanmar (N=309); Philippines (N=307); Singapore (N=305); Thailand(N=300); Vietnam(N=304)



# Over 90% welcomed Japanese companies to expand into ASEAN. 85% Filipinos strongly welcomed the expansion, followed by Vietnamese at 74%.

## Welcomeness of Japanese companies expanding in ASEAN market (%)

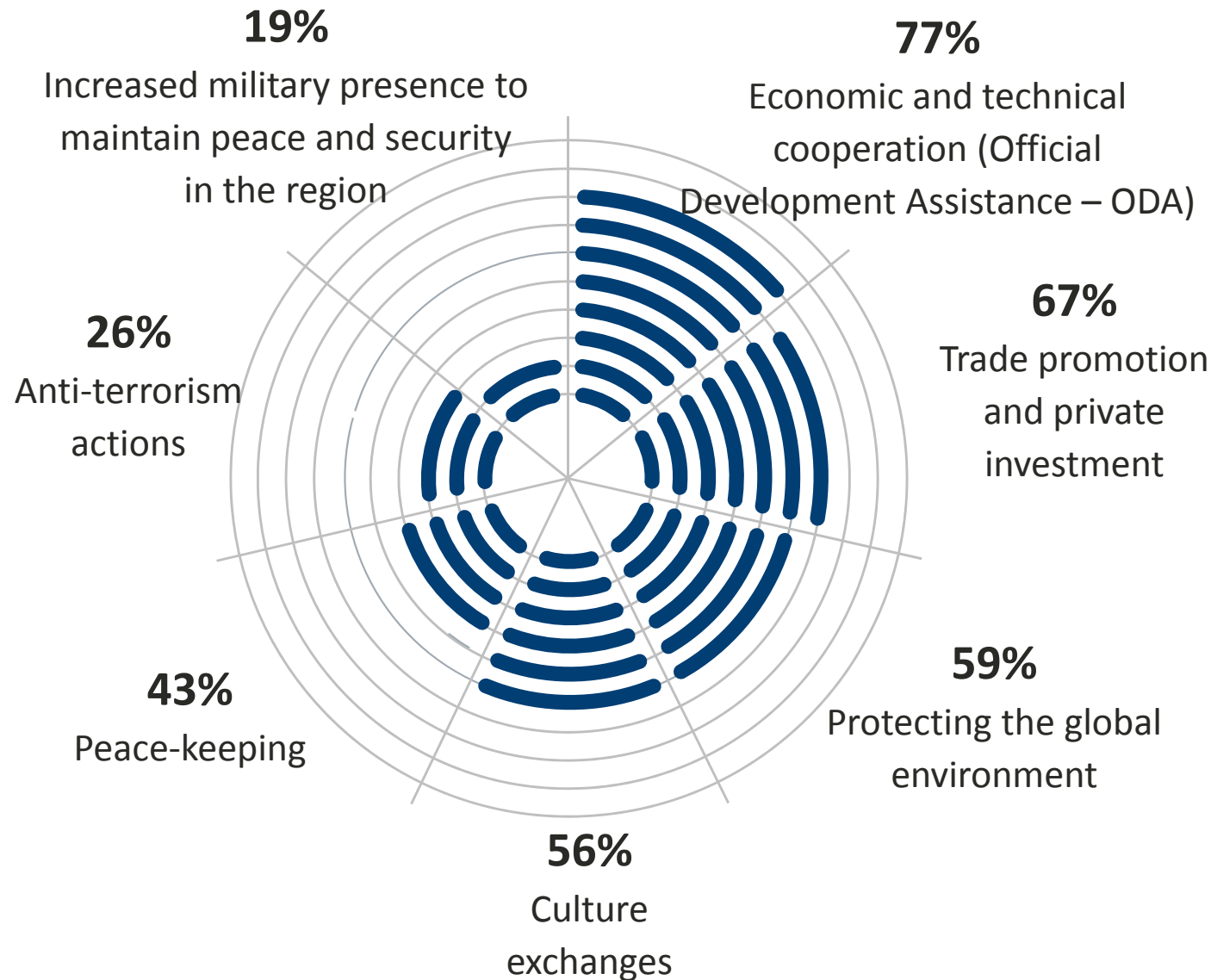


Q10. How do you feel about Japanese companies expanding into ASEAN (Association of Southeast Asian Nations) market? Would you say they are welcomed or not welcomed?

Base: All respondents (N=2,144); Indonesia (N=302); Malaysia (N=317); Myanmar (N=309); Philippines (N=307); Singapore (N=305); Thailand(N=300); Vietnam(N=304)

# Over three quarters wanted Japan to contribute more in terms of economic and technical cooperation, followed by trade promotion and private investment.

## Areas to be contributed by Japan (%)



Q12. Which of the following do you wish Japan to contribute to the ASEAN region (Association of Southeast Asian Nations), including your country? Choose multiple answers from the following list.

Base: All respondents (N=2,144);

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# Economic and technical cooperation was the top mention among all countries. Singaporeans saw economic/technical cooperation and culture exchanges to be equally important.

## Areas to be contributed by Japan (%)

	Indonesia	Malaysia	Myanmar	Philippines	Singapore	Thailand	Vietnam
Economic and technical cooperation (Official Development Assistance – ODA)	78	76	82	83	64	75	82
Trade promotion and private investment	68	73	54	75	62	67	74
Protecting the global environment	51	63	40	72	60	56	68
Culture exchanges	69	61	30	50	64	53	63
Peace-keeping	51	43	21	61	48	29	49
Anti-terrorism actions	18	29	13	45	35	22	21
Increased military presence to maintain peace and security in the region	19	14	5	29	16	21	28

Q12. Which of the following do you wish Japan to contribute to the ASEAN region (Association of Southeast Asian Nations), including your country? Choose multiple answers from the following list..

Base: Indonesia (N=302); Malaysia (N=317); Myanmar (N=309); Philippines (N=307); Singapore (N=305); Thailand(N=300); Vietnam(N=304)

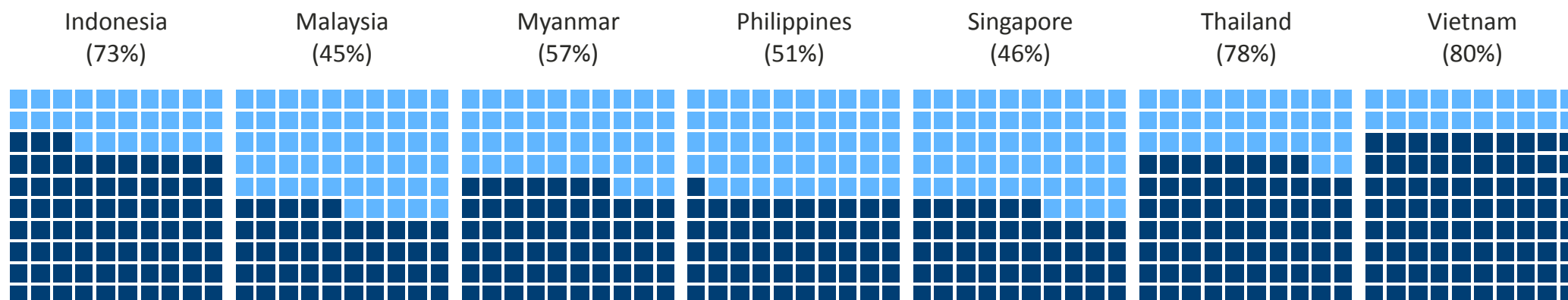


**Six out of ten were aware of FTAs/EPAs negotiations between Japan and ASEAN. Those negotiations raised high awareness in Vietnam (80%), followed by Thailand (78%) and Indonesia (73%).**

*Awareness of FTAs/EPAs negotiations between Japan and ASEAN (%)*

61%

Aware of the negotiation



Q13. Are you aware of the fact that Japan has concluded or is negotiating FTAs (Free Trade Agreements)/EPAs (Economic Partnership Agreements) with ASEAN (Association of Southeast Asian Nations) countries?

Base: All respondents (N=2,144); Indonesia (N=302); Malaysia (N=317); Myanmar (N=309); Philippines (N=307); Singapore (N=305); Thailand(N=300); Vietnam(N=304)

**Two thirds looked for the strengthening of ties in all aspects between Japan and ASEAN and not limited to the economic field, followed by investment/trade expansion and economic structure's improvement/development.**

Expected outcomes of FTAs/EPAs between Japan and ASEAN (%)

**66%**

Strengthening of ties between Japan and ASEAN, not only in the economic field

**63%**

Investment and trade expansion

**63%**

Improvement and development of the economic structure of ASEAN member countries

**59%**

Technological support from Japan

**36%**

More liberal people-to-people exchanges

Q14. What do you hope to happen, regarding the FTAs (Free Trade Agreements)/EPAs (Economic Partnership Agreements) between Japan and ASEAN (Association of Southeast Asian Nations)?

Base: Those have awareness of negotiation of FTAs/EPAs and Japan - Total(N=1,312);

# Singapore and Thailand expected investment/trade expansion while Indonesia, Malaysia and The Philippines looked for economic structure's improvement/development in ASEAN countries.

## Expected outcomes of FTAs/EPAs between Japan and ASEAN (%)

	Indonesia	Malaysia	Myanmar	Philippines	Singapore	Thailand	Vietnam
Strengthening of ties between Japan and ASEAN, not only in the economic field	63	65	75	71	67	58	68
Investment and trade expansion	52	70	49	71	69	67	65
Improvement and development of the economic structure of ASEAN member countries	66	71	36	79	66	62	63
Technological support from Japan	58	65	52	62	64	49	63
More liberal people-to-people exchanges	34	36	44	32	43	23	44

Q14. What do you hope to happen, regarding the FTAs (Free Trade Agreements)/EPAs (Economic Partnership Agreements) between Japan and ASEAN (Association of Southeast Asian Nations)?

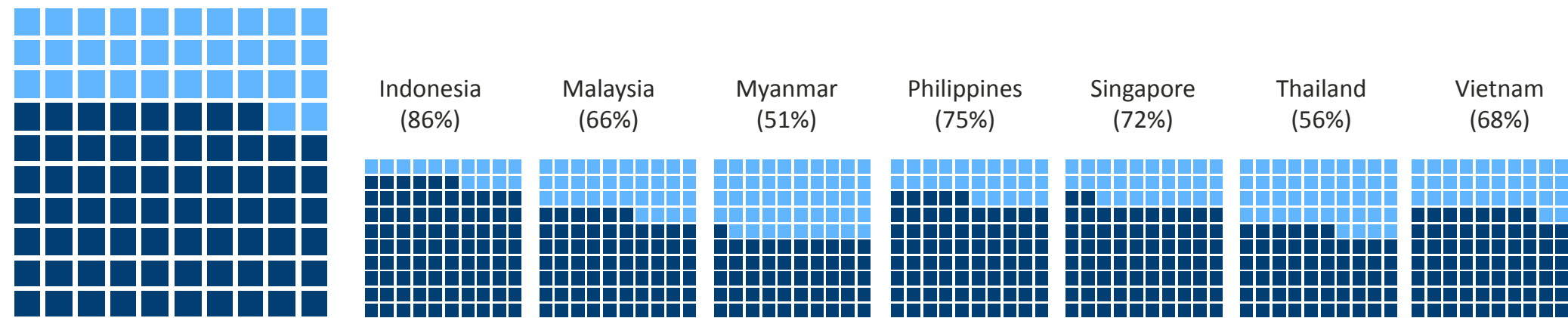
Base: Those have awareness of negotiation of FTAs/EPAs and Japan - Indonesia (N=221); Malaysia (N=144); Myanmar (N=175); Philippines (N=156); Singapore (N=139); Thailand(N=234); Vietnam(N=243)



68% were aware of the functions of the UN Security Council with Indonesia reporting the highest awareness (86%). Over 80% agreed that Japan should be a standing member of the Council with the highest support from Vietnam (91%).

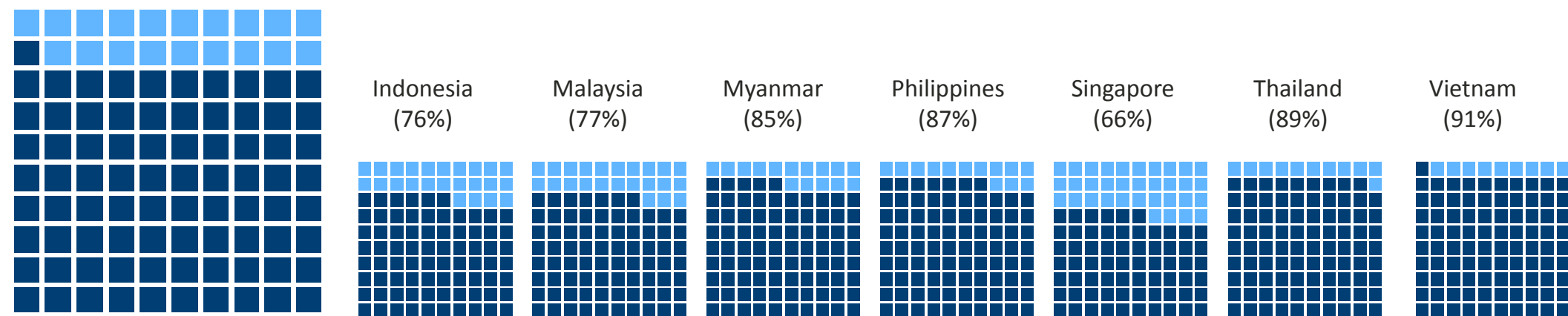
*Awareness of the functions of the UN Security Council (%)*

**Total (68%)**



*Agree that Japan should be a standing member of the UN Security Council (%)*

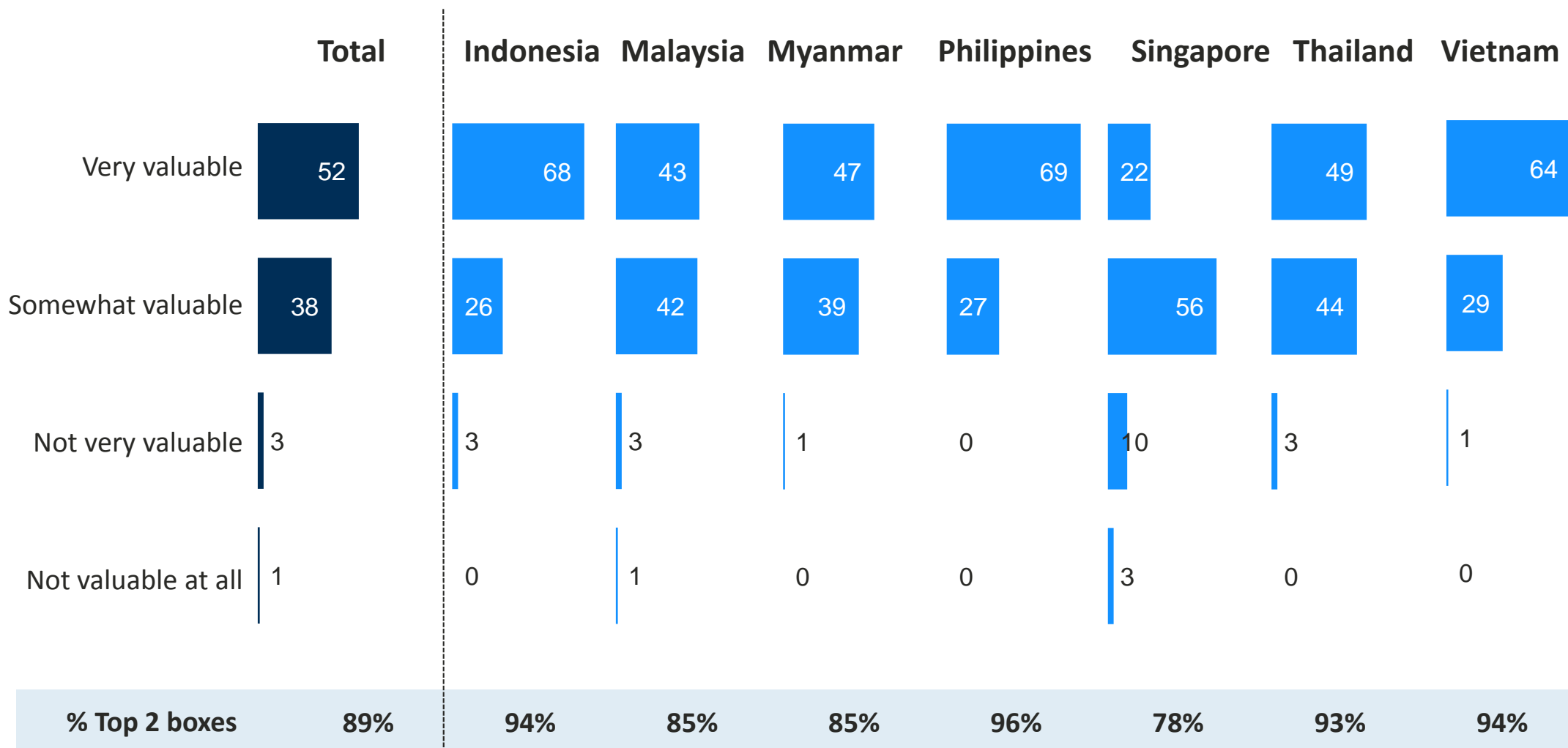
**Total (81%)**



Q16 Do you know the function of the United Nations (UN) Security Council?  
Base: All respondents (N=2,144)  
Q17 Do you think Japan should be a standing member of the United Nations (UN) Security Council?  
Base: Those who aware of UN Security Council (N=1,429)

**Almost 90% indicated that the policy was valuable. Two thirds of Indonesians, Filipinos and Vietnamese rated it as being very valuable. Of all markets, Singapore rated it to be the least valuable.**

*Value of "Proactive Contribution to Peace" policy for peacekeeping of Asia region (%)*



Q15. The Prime Minister Sinzo Abe elaborates his security policy to proactively contribute even further to the peace and stability of the region and the international community from the perspective of "Proactive Contribution to Peace" based on the long-standing principle of international cooperation. Do you think this policy is valuable for peacekeeping of Asia region including ASEAN (Association of Southeast Asian Nations) countries?

Base: All respondents (N=2,144); Indonesia (N=302); Malaysia (N=317); Myanmar (N=309); Philippines (N=307); Singapore (N=305); Thailand(N=300); Vietnam(N=304)

# Views towards Anniversary Celebration of the 40<sup>th</sup> Friendship and Cooperation between Japan and ASEAN

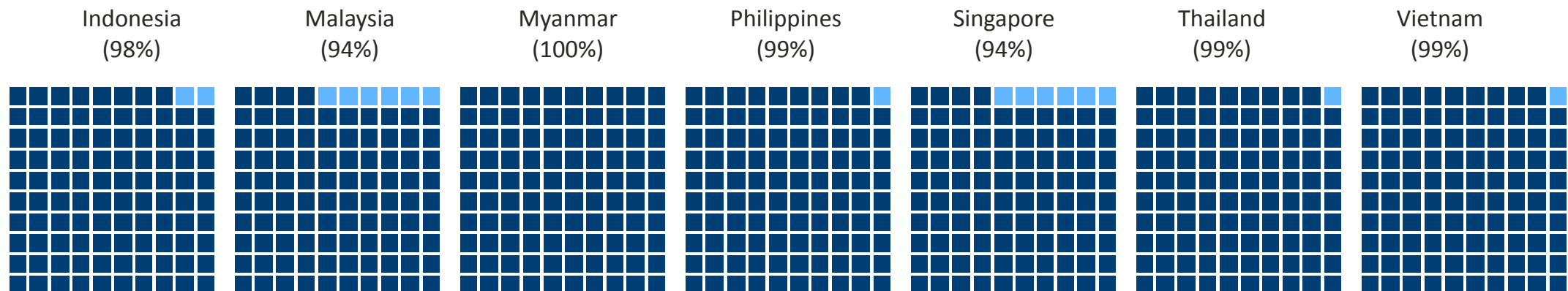




# Almost all (98%) indicated that organizing anniversary events would be valuable

Valuable to strengthen the relationship between Japan and ASEAN through anniversary events (%)

98% indicated that it was valuable



Q23. Like the 40th friendship and cooperation between Japan and ASEAN (Association of Southeast Asian Nations), would you think it is valuable to strengthen the relationship between Japan and ASEAN through this kind of anniversary events?

Base: All respondents (N=2,144); Indonesia (N=302); Malaysia (N=317); Myanmar (N=309); Philippines (N=307); Singapore (N=305); Thailand(N=300); Vietnam(N=304)

# Exhibitions were the event of top interest which people had attended or would like to attend, followed by events about Japanese traditional culture and theatrical performances.

Events attended/of interest to attend for celebrating the 40th friendship and cooperation between Japan and ASEAN (%)

**63%** attended or interested in attending exhibitions

**56%**

Events about  
Japanese traditional  
culture and theatrical  
performances

**40%**

Youth  
exchanging  
events

**36%**

Film shows

**35%**

Events about  
Japanese pop  
culture

Q22. As an anniversary year for the 40th friendship and cooperation between Japan and ASEAN (Association of Southeast Asian Nations), there were many events held in ASEAN countries in 2013. Please choose events you have attended or events you would like to attend if there is a same sort of occasion.

Base: All respondents (N=2,144);

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# All countries regarded exhibitions as the top event except for Vietnam where events about Japanese traditional culture and theatrical performances were rated #1 instead.

Events attended/ of interest to attend for celebrating the 40th friendship and cooperation between Japan and ASEAN (%)

	Indonesia	Malaysia	Myanmar	Philippines	Singapore	Thailand	Vietnam
Exhibitions	71	70	45	65	62	68	60
Events about Japanese traditional culture and theatrical performances	66	59	32	64	53	55	67
Youth exchanging events	39	43	37	48	28	43	43
Film shows	42	39	22	50	33	27	43
Events about Japanese pop culture	42	26	14	41	35	38	54

Q22. As an anniversary year for the 40th friendship and cooperation between Japan and ASEAN (Association of Southeast Asian Nations), there were many events held in ASEAN countries in 2013. Please choose events you have attended or events you would like to attend if there is a same sort of occasion.

Base: Indonesia (N=302); Malaysia (N=317); Myanmar (N=309); Philippines (N=307); Singapore (N=305); Thailand(N=300); Vietnam(N=304)



# Demographics





## GENDER

**49%**  
MALE

**51%**  
FEMALE



## AGE

**44%** 18-34   **22%** 35-44   **20%** 45-54

**14%** 55+   **38** MEAN



## Occupation

Business owner	11%
Senior management	6%
Middle management	14%
Junior management	7%
Professional	17%
Other white collar	12%
Blue collar	2%
Homemaker	5%
Student	11%
Unemployed	4%
Retired	5%
Others	6%



## EDUCATION

**25%**  
University - Post graduate

**44%**  
University - Under graduate

**17%**  
College but not university

**13%**  
Completed secondary education or below



## INCOME



**USD 1,670**

HOUSEHOLD MONTHLY INCOME (MEAN)

# Profile: Gender / Age / Average Income

## Gender

%	Total	Indonesia	Malaysia	Myanmar	Philippines	Singapore	Thailand	Vietnam
Male	49	50	48	48	50	49	49	49
Female	51	50	52	52	50	51	51	51

## Age

%	Total	Indonesia	Malaysia	Myanmar	Philippines	Singapore	Thailand	Vietnam
18-34	44	42	47	48	50	34	36	49
35-44	22	30	22	20	20	25	25	17
45-54	20	15	20	18	23	23	20	24
55+	14	13	11	14	8	18	20	11

## Average Income

USD	Total	Indonesia	Malaysia	Myanmar	Philippines	Singapore	Thailand	Vietnam
MEAN	1670	358	1574	373	1015	5811	1843	452

S5. What is your gender?

S4. Which of the following age groups do you fall into?

S7. What is the your approximate monthly household income including all sources before tax?

Base: All respondents (N=2,144); Indonesia (N=302); Malaysia (N=317); Myanmar (N=309); Philippines (N=307); Singapore (N=305); Thailand(N=300); Vietnam(N=304)



%	Total	Indonesia	Malaysia	Myanmar	Philippines	Singapore	Thailand	Vietnam
University – Post graduate	25	10	18	57	38	21	17	15
University – Under graduate	44	67	35	26	28	31	66	58
College but not university	17	7	25	11	27	30	7	12
Completed secondary education or below	13	16	21	5	7	18	10	15

S9. What is your highest attained education level?

Base: All respondents (N=2,144); Indonesia (N=302); Malaysia (N=317); Myanmar (N=309); Philippines (N=307); Singapore (N=305); Thailand(N=300); Vietnam(N=304)

# Profile: Occupation

%	Total	Indonesia	Malaysia	Myanmar	Philippines	Singapore	Thailand	Vietnam
Business owner	11	7	11	11	12	7	14	15
Senior management	6	7	8	6	3	5	3	9
Middle management	14	17	10	16	7	18	18	14
Junior management	7	6	8	6	6	9	10	6
Professional	17	15	16	17	25	20	9	18
Other white collar	12	15	7	13	9	11	17	12
Blue collar	2	1	3	1	2	5	2	-
Homemaker	5	7	5	7	7	4	1	3
Student	11	6	17	11	8	10	10	14
Unemployed	4	2	3	1	12	2	4	2
Retired	5	9	6	4	2	4	7	4
Others	6	9	6	8	7	5	5	3

S6. What is your occupation?

Base: All respondents (N=2,144); Indonesia (N=302); Malaysia (N=317); Myanmar (N=309); Philippines (N=307); Singapore (N=305); Thailand(N=300); Vietnam(N=304)





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