

# CHARTING THEIR OWN COURSE

## *HOW INDONESIANS SEE THE WORLD*

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The *Indonesia Poll 2021 — Charting their own course: How Indonesians see the world* survey and report is supported by the Department of Foreign Affairs and Trade. Responsibility for the views, information and advice expressed in this report are those of the authors and do not necessarily reflect the views of the Lowy Institute or the Australian government.

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## EXECUTIVE SUMMARY

With Indonesia seeking to play a larger role on the global stage, and many outside powers hoping to woo Southeast Asia's largest country, there is a pressing need to better understand how its people see the world and themselves in a changing international environment.

The *Indonesia Poll 2021 – Charting their own course*, conducted a decade after the Lowy Institute's last poll in the country, is based on fieldwork carried out in December 2021. The survey consists of a nationally representative sample of some 3000 Indonesians aged 17 to 65 across 33 provinces of Indonesia.

The polling results reveal that the citizens of the world's third most populous democracy are optimistic about the future but wary of the great powers that are seeking to court them. They are increasingly sceptical about China, and particularly of Chinese investment, but neither are they overly enthusiastic about the United States. Trust in near neighbours — Malaysia and Singapore — remains high but has declined for Australia.

On several questions, Indonesians hold contradictory views. Most Indonesians support democracy, but they also respect authoritarian leaders overseas. They see domestic issues as the most significant threats to Indonesia's interests, but express confidence in Indonesia's global standing and future.

The survey respondents defy easy stereotyping. Amid talk of an Islamic turn in Indonesian foreign policy, and rising religious conservatism at home, more Indonesians express confidence in the leaders of Saudi Arabia and the United Arab Emirates than in any other foreign leaders. But Japan, the United States and South Korea are the top destinations for Indonesians to study and work abroad.

While the survey presents many diverse viewpoints, overall it projects an image of a confident, ambitious people who want Indonesia to chart its own course in the world.

## INTRODUCTION

As Asia is buffeted by intensifying great power rivalries, Indonesia faces competing pressures from the outside world on its alignment and direction of travel. There are also growing expectations that a more prosperous and confident Indonesia will take a greater leadership role in regional and global affairs.

This is not the first time that Indonesia has had to make its own way in a bitterly contested world.

As Indonesia threw off the shackles of Dutch colonialism, founding father Mohammad Hatta asked in 1948 if Indonesians “have to choose between Russia and America?” His answer was no. He declared that “we must remain the subject who reserves the right to decide our own destiny.”

Hatta called for Indonesia to “row between two reefs” — one of the most enduring images of Indonesia’s quest to navigate the Cold War — and laid out Indonesia’s “independent and active” principle of foreign policy. For almost 75 years, Indonesian leaders have broadly held to that principle, even if they implemented foreign policies seemingly inimical to it from time to time.

While these images convey the need for a strong captain across the seas, too little attention has been paid to the people on board. Most analysis of Indonesian foreign policy centres on the elite — presidents and foreign ministers for the most part.

But what of the Indonesian public, who play a key role in shaping foreign policy in the world’s third most populous democracy? How do Indonesians view the world? Do they want to stay ‘neutral’ amidst a rapidly changing world?

A decade has passed since the last Lowy Institute poll in Indonesia. In that period, Indonesia has grown wealthier and now aspires to a greater role on the global stage. But the world, and Asia in particular, also looks far more contested, fractious and dangerous than it did in 2011.

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The Lowy Institute surveyed a nationally representative sample – some 3000 Indonesians aged 17 to 65 across 33 provinces – between 29 November and 24 December 2021 to understand how the nation’s 275 million people perceive their neighbours, the great powers, the major threats facing Indonesia and its position in the world.

The survey considers a wide range of vital issues for Indonesia’s present and future, from security threats and regional relations to climate change. It asks how connected Indonesians are to the world, and how Indonesians

*The findings confirm some age-old beliefs – and challenge others – about how Indonesians see the country’s role in the world.*

see the world in general. We ask how respondents understand key foreign policy doctrines or platforms – from the Association of Southeast Asian Nations to the United Nations – and how they should be prioritised. We further examine how the public views the role of key agencies in safeguarding the country’s strategic interests.

The findings confirm some age-old beliefs – and challenge others – about how Indonesians see the country’s role in the world. On more than a few questions, we see contradictory worldviews – as is common in many countries. Most

Indonesians support democracy, but they also respect authoritarian leaders overseas. They are more confident in their own county and institutions than in the past, but have lost trust in most major powers.

They are increasingly wary about China, and particularly Chinese investment, and are not overly enthusiastic about the United States and Australia. They see domestic issues as the most significant threats to Indonesia’s interests, but would also support the country playing a larger global role.

Survey respondents defy easy stereotyping. Amid talk of an Islamic turn in Indonesian foreign policy, and rising religious conservatism at home, Indonesians express more confidence in the Crown Princes of Saudi Arabia, Mohammed bin Salman Al Saud, and the Emirate of Abu Dhabi, Sheikh Mohamed bin Zayed Al Nahyan, than any other foreign leaders. But Japan, the United States and South Korea are the top destinations for Indonesians to study and work abroad.

Overall, the survey depicts a confident, ambitious people who want Indonesia to chart its own course in the world.

We believe that listening is a vital tool for understanding Southeast Asia's largest country. It is in this spirit that we present the findings of this Lowy Institute survey.

## KEY FINDINGS

### 1. Confidence in Indonesia's standing and future

Most Indonesians feel confident about their country's future, despite the Covid-19 pandemic, the associated recession and rising great power tensions in their region. The proportion of people who feel 'safe' or 'very safe' has risen to 74% from 68% in 2011 and 43% in 2006. Similarly, the vast majority of Indonesians (80%) say their country is going in the right direction. This marks a 12-point jump since 2011.

Correspondingly, many Indonesians also seem to have a high degree of confidence in the country's government. More Indonesians have confidence in President Joko Widodo — popularly known as Jokowi — to do the right thing in world affairs than in any other leader: 74% say they have 'a lot' or 'some' confidence in him. The vast majority (84%) trust Indonesia 'a great deal' or 'somewhat' to act responsibly in the world, unchanged from 2011. These figures echo the president's consistently high public approval ratings.

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### 2. Democracy and the world

A clear majority of Indonesians believe that democracy is the best system of government, and they identify strongly as part of the democratic world. However, many also hold high levels of confidence in authoritarian or unelected leaders of other countries.

After President Joko, the two next leaders that inspire confidence are Saudi Arabia's Crown Prince Mohammed bin Salman Al Saud (57%) and United Arab Emirates' Sheikh Mohamed bin Zayed Al Nahyan, the Crown Prince of the Emirate of Abu Dhabi (52%). Joko has courted both leaders as key investment partners.

Fewer Indonesians express confidence in Japan's Prime Minister Fumio Kishida (45%), Singapore's Prime Minister Lee Hsien Loong (44%) and US President Joe Biden (44%). Four in ten (40%) have confidence in Russia's President Vladimir Putin, though it should be noted that this survey was conducted prior to Russia's invasion of Ukraine.

Indonesians have particularly low levels of confidence in some regional leaders, and around a third of Indonesians had not heard of most world leaders. A minority of Indonesians (38%) express confidence in Australia's Prime Minister Scott Morrison, for example, and the same number (38%) have confidence in India's Prime Minister Narendra Modi. Only a third of Indonesians (34%) have confidence in China's President Xi Jinping and North Korea's leader Kim Jong-un.

### 3. Trust in global and regional powers

Indonesians have grown distrustful of major powers over the past decade. The level of trust towards the United States, China, Japan, India and Australia to act responsibly has fallen dramatically since 2011.

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Although more than half (56%) say they trust the United States, this is a 16-point fall compared to ten years ago, but an improvement from 2006 when only 32% trusted the United States. Even fewer Indonesians (42%) trust China to act responsibly, a decline of 18 points over the past decade. Trust in India has continued on a downwards trajectory, with only 41% saying they trust the country, a 17-point fall since 2006.

While 65% of Indonesians say they trust Japan, this has similarly dropped 15 points since 2011.

The falling levels of trust are even starker when it comes to Australia: 55% express trust in the country, a 20-point drop from 2011 levels. Less than half the population (47%) say they trust Russia (noting this survey was fielded prior to Russia's invasion of Ukraine).

By contrast, Indonesian views towards their near neighbours have remained stable over the past decade. Two-thirds (66%) express trust in Singapore, a marginal three-point fall from 2011, and 39% trust Vietnam, unchanged from the previous decade. More broadly, despite relatively high levels of warmth towards, and confidence in, neighbouring Singapore and Malaysia — which have close cultural, social and linguistic links to Indonesia — respondents are not particularly warm towards other more distant Association of Southeast Asian Nations (ASEAN) member states such as Vietnam and Myanmar.

#### 4. United States and China

While the public standing of both the United States and China has declined in Indonesian eyes, China is seen in a more negative light on a range of measures. In a significant 11-point decline, only 43% of Indonesians now say that ‘China’s growth has been good for Indonesia’, a view previously held by the majority (54% in 2011). Almost half the population (48%) agree that ‘China’s aim is to dominate Asia’.

Even in policy areas traditionally seen as China’s stronghold — the economy and investment — the United States generally outperforms China. When asked which country is the most important for Indonesia’s economy, 18% choose the United States, while 12% say China. Less than half (42%) are in favour of US foreign investment, but even fewer (30%) favour Chinese foreign investment. In 2011, the majority of respondents (52%) said China would be Asia’s leading economic power in 20 years. In a stark 21-point drop, this view is now only held by 31% of Indonesians about China’s trajectory in the next 20 years.

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More broadly, in a side-by-side comparison across different questions, China ranks less favourably than the United States across a range of indicators, from military and economic leadership, and influence and security concerns, to ‘soft power’ benchmarks such as education and work destinations.

Despite the worsening of China’s standing relative to the United States, the vast majority (84%) are determined that Indonesia should stay neutral in any US–China conflict. A mere 4% say that Indonesia should support the United States, and 1% say Indonesia should support China.

The public is also unsure about the outcome of great power rivalry in the future. When asked about whether China or the United States will be the leading military power in Asia in 20 years, around a third of Indonesians (36%) say the United States, a 22-point fall from 2011. Around a fifth (22%) say China will be Asia’s leading military power, and 36% say that they do not know which country will be Asia’s leading military power.

In any case, most Indonesians do not want their government’s foreign policy to be focused on great power competition. But there is a significant increase in the number of Indonesians who wish to see Indonesia play a

more significant role in relation to China. Six in ten (60%) either strongly agree or agree that ‘Indonesia should join with other countries to limit China’s influence’, an increase of ten points since 2011.

It should be noted that the United States and China are not necessarily the top two countries on the public’s mind. The picture becomes more complicated when placed within the broader context of Indonesia’s regional economic, social and political preferences. Japan, for example, is the top choice among respondents for study or working abroad.

*As has been the case for more than 75 years, Indonesians remain more preoccupied with internal and non-traditional security concerns and threats.*

Indonesians feel warmest towards Saudi Arabia, along with Japan, the United Arab Emirates, Singapore and the Palestinian territories. While the poll offers important insights into the perception of US–China competition in Indonesia, these responses show that Indonesians see the world through a wider lens than great power rivalry.

#### **5. Threats to Indonesia**

As has been the case for more than 75 years, Indonesians remain more preoccupied with internal and non-traditional security concerns and threats, rather than external and conventional ones. The top perceived threat is separatism, with two-thirds (67%) saying that ‘Indonesia being broken up into several different countries’ is a critical threat. Around 63% see Covid-19 and other potential epidemics as a critical threat, with similar numbers concerned about possible critical threats from food shortages, international terrorism, social or religious intolerance, foreign intervention, a severe downturn in the domestic economy, international financial instability, internal unrest and foreign workers coming to Indonesia. The ranking of priorities is very similar to results in 2011, but overall, people are less concerned about these threats than they were a decade ago.

When asked specifically about countries that threaten Indonesia, a majority of respondents say that India, Japan, Malaysia, Singapore and Vietnam do not pose a threat to Indonesia’s security in the next ten years. China is the country of most concern, with nearly half of Indonesians (49%) seeing it as a threat to their country in the next decade, an increase of ten points from 2011. Four in ten (43%) say the United States poses a threat, a six-point decline, while 34% say Australia poses a threat, a three-point increase since a decade ago.

## 6. Indonesian foreign policy

Perhaps unsurprisingly, most Indonesians continue to prioritise domestic stability and want their government to focus on supporting jobs and the economy at home and keeping citizens safe overseas, much as they did a decade ago. In 2011, Indonesians' three most important ambitions for their foreign policy were: 'protecting the jobs of Indonesian workers', 'protecting Indonesian citizens abroad' and 'strengthening the Indonesian economy'.

In 2021, those three goals come in the top four, alongside 'protecting the health of citizens domestically'. Just over 60% of respondents say that all four priorities are 'very important'. A similar proportion say that 'protecting Indonesia's sovereign waters or archipelagic waters' is a very important priority. When it comes to defending Indonesia's strategic interests more broadly, many more of the public express confidence in the Indonesian Armed Forces (70%) than in the Ministry of Foreign Affairs (47%).

Three-quarters of the public (74%) are not aware of the country's signature 'independent and active' foreign policy principle that former Prime Minister and Vice President Hatta first articulated in 1948. But of those with some or a good understanding of the principle, nine in ten (90%) say it should be maintained.

In terms of diplomatic style, only one in five respondents say they want to see the government 'defending Indonesia's interests at all costs, even if it involves confrontation with other countries'. Some 46% say they favour the government taking a middle path 'being firm but polite, even if it causes some friction with other countries'. And just over one in three wants to see Jakarta taking what some would regard as a traditional Javanese approach, 'engaging with other countries in a patient way, seeking consensus through consultation'.

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## 7. Promoting global peace and stability

The 86% of respondents who see 'promoting peace and conflict resolution' as a very or fairly important goal for Indonesian foreign policy are broadly supportive of some of the government's recent steps to promote these themes. Respondents' top priorities for Indonesia's peace and conflict resolution agenda are: deploying Indonesian peacekeepers to

other countries (with 87% saying it is important), playing a larger role in the Islamic world (82%), providing foreign aid to developing countries (80%), and creating an independent Palestinian state (79%).

The strong support for foreign aid suggests some backing for the government's new Indonesian Agency for International Development, which was launched in 2019. Thinking about other diplomatic initiatives taken by Jakarta in recent years, 73% say that addressing the Rohingya issue is important, 69% say that supporting an inclusive government in Afghanistan is important, and 66% say that playing a leadership role in resolving the Myanmar crisis is important.

*The 'minilateral' arrangements that have proliferated in the region in recent years have yet to register much public recognition.*

When it comes to China, three-quarters (76%) say that it is important for Indonesia to push ASEAN to manage the South China Sea disputes. Two-thirds of Indonesians (66%) say it is important to protect Uyghur communities in China, and fewer (62%) see 'helping to mediate US-China competition' and 'supporting the democratic movement in Hong Kong' as important goals for Indonesia.

## **8. Multilateralism and minilateralism**

Although Indonesia often frames its foreign policy through its membership of ASEAN, only three in ten people (30%) say that the regional grouping is the most important organisation for Indonesia, a significant drop of ten points over the past decade. This is despite an elite focus on ASEAN as the 'cornerstone' of Indonesian foreign policy. The G20, which Indonesia is currently chairing, comes at the bottom of the rankings.

The United Nations comes out on top, with 41% saying it is the most important organisation for Indonesia. Other organisations that are the subject of Indonesian government focus received few responses, with 5% seeing the Organisation of Islamic Cooperation (OIC) as the most important, followed by Asia-Pacific Economic Cooperation (APEC) with 4%. At the same time, the vast majority of Indonesians identify the country as being part of the 'Islamic world' (72%) and the 'Asia-Pacific' (78%).

Meanwhile, the 'minilateral' arrangements that have proliferated in the region in recent years have yet to register much public recognition. More than nine in ten (93%) Indonesians have never heard of the Quadrilateral

Security Dialogue (the Quad), the grouping composed of the United States, India, Japan and Australia. Only a small minority (11%) has heard of Australia's plan to acquire nuclear-powered submarines through the AUKUS partnership with the United States and the United Kingdom (see p. 45).

### **9. Trust in information sources**

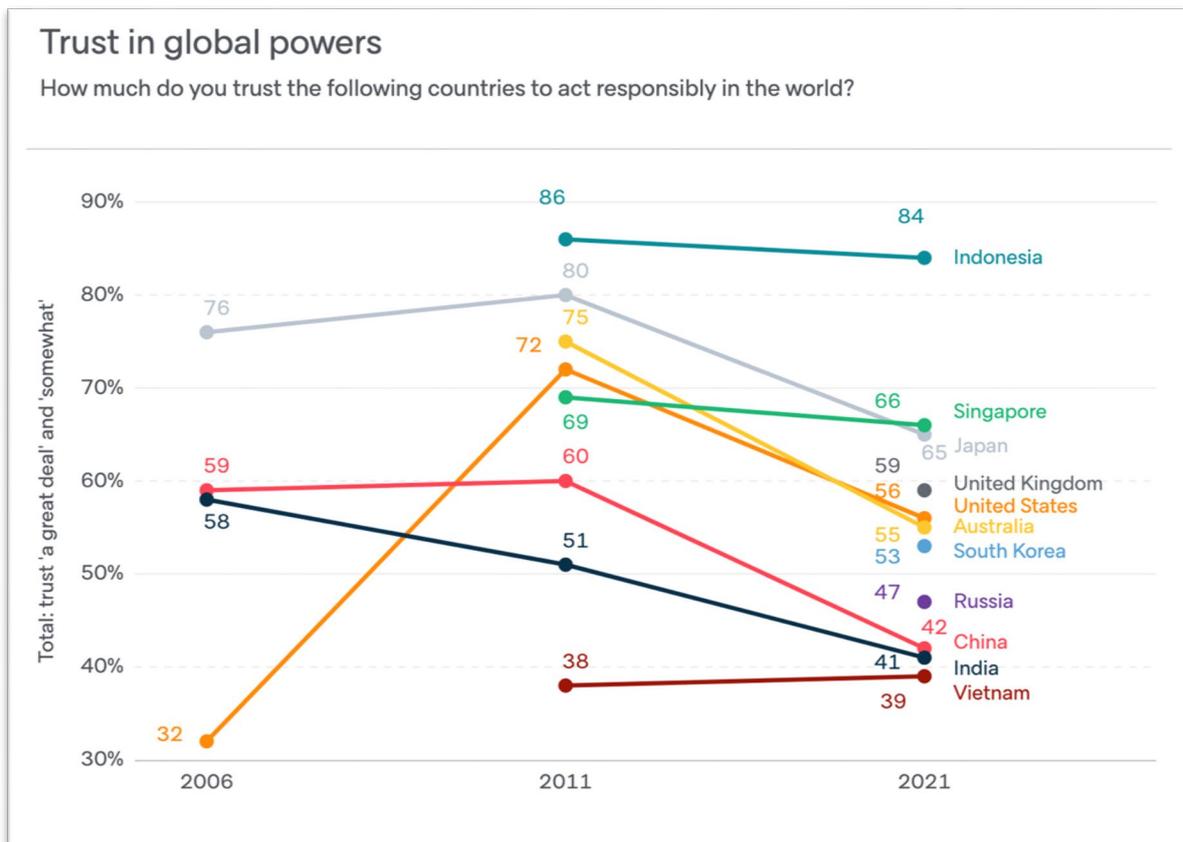
Indonesia's information environment is hotly contested with politicians, traditional media outlets, the security services and influencers battling it out for public attention, especially on social media. As is the case in many democracies, misinformation and disinformation often drowns out more authoritative sources of news and information, a problem that has compounded the response to the Covid-19 pandemic.

Most Indonesians see the military (94%) and President Joko (92%) as trusted sources of information, saying they either trust both 'a great deal' or 'somewhat' to be accurate and fair. Just over half of Indonesians (53%) say they have 'a great deal' of trust in both the military and the President. They are followed in descending order by scientists and experts (90%), friends and family (88%), religious leaders (87%), the police (81%) and local government (81%). There is less trust in television and radio news (79%), international media (69%), political parties (68%) and local newspapers/websites (67%) as well as influencers and celebrities (56%).

## GLOBAL POWERS AND LEADERS

Indonesians have grown distrustful of major powers over the past decade, registering substantial declines in trust towards the United States, China, Japan, Australia and India.

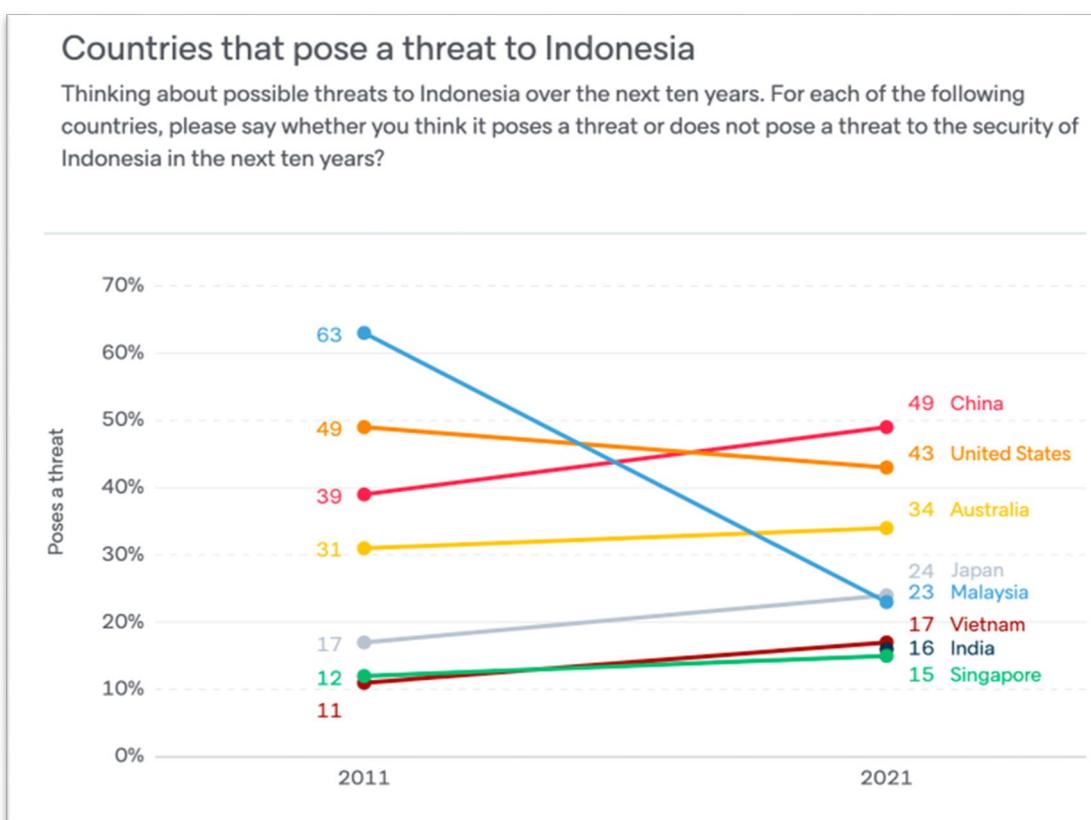
Indonesians reserve their highest levels of trust for their own country, with 84% saying they trust Indonesia ‘a great deal’ or ‘somewhat’ to act responsibly in the world. This is unchanged from 2011. A majority of Indonesians trust the United States and Australia to act responsibly, but this number has fallen dramatically since 2011. More than half (56%) say they trust the United States, a 16-point fall since ten years ago. The shift is even starker when it comes to Australia: 55% express trust in Australia, a 20-point drop from 2011 levels. Six in ten Indonesians (59%) express trust in the United Kingdom, which was not included in the 2011 survey.



Falling levels of trust for regional countries are also evident. While 65% of Indonesians say they trust Japan, this figure has dropped 15 points since

2011. Four in ten Indonesians (42%) trust China to act responsibly in the world, a decline of 18 points over the past decade. Trust in India has also fallen ten points, with only 41% saying they trust the country.

Indonesian views towards their near neighbours have remained more stable over the past decade. Two-thirds (66%) express trust in Singapore, a marginal three-point fall from 2011, and 39% trust Vietnam, unchanged from the previous survey.



Low levels of trust in countries do not necessarily correlate with whether countries are perceived as security threats to Indonesia. China has replaced Malaysia as the country that Indonesians are most likely to perceive as a security threat. Around half the population (49%) say China poses a threat to Indonesia over the next ten years, a ten-point increase from 2011. Four in ten Indonesians (43%) see the United States as a possible security threat, but that figure has fallen six points in the past decade. Around a third of Indonesians (34%) say Australia poses a threat, a small three-point increase since 2011.

Indonesian threat perceptions towards Malaysia have changed dramatically in the past decade. Only 23% see Malaysia as a possible threat, a 40-point decline since 2011. Concern about Japan has risen from a low-level base, with 24% saying it poses a threat in 2021, a seven-point bump since the last poll. Very few Indonesians see Vietnam (17%, up six points), India (16%) or Singapore (15%, up three points) as a threat.

### **Confidence in leaders**

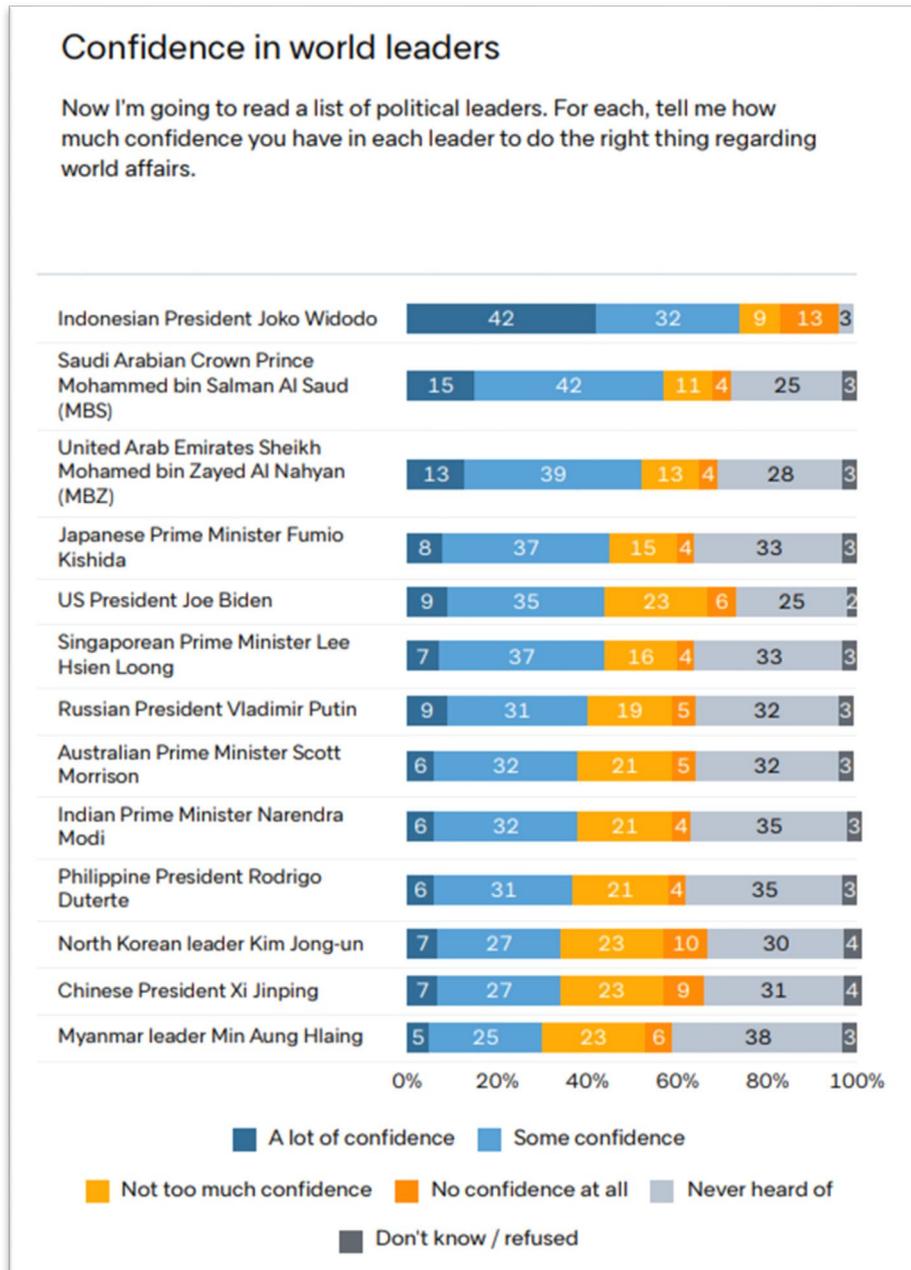
Although Indonesians remain committed to democracy (see p. 35), many hold high levels of confidence in authoritarian regimes or leaders who were not elected. Regime type appears to matter less to the public than a country's economic engagement and profile in Indonesia. Indonesians reserve their highest levels of confidence for their own leader, with 74% of Indonesians saying they have 'a lot' or 'some' confidence in President Joko Widodo.

A majority of Indonesians have confidence in Saudi Arabian Crown Prince Mohammed bin Salman Al Saud (57%) and United Arab Emirates' Sheikh Mohamed bin Zayed Al Nahyan, the Crown Prince of the Emirate of Abu Dhabi (52%). Respondents express these high levels of confidence regardless of their stated religion.

Indonesians hold lower levels of confidence in Japan's Prime Minister Fumio Kishida (45%), Singapore's Prime Minister Lee Hsien Loong (44%) and US President Joe Biden (44%). Four in ten (40%) have confidence in Russia's President Vladimir Putin, though it should be noted that this survey was conducted prior to the 2022 invasion of Ukraine.

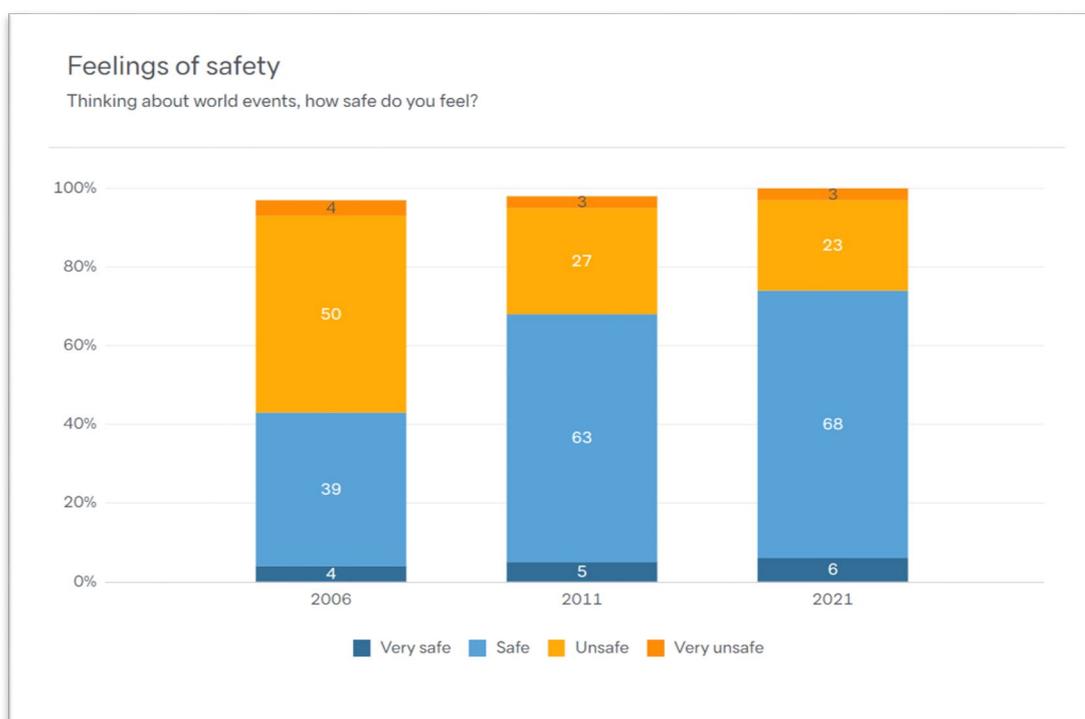
Indonesians have particularly low levels of confidence in regional leaders. A minority of Indonesians (38%) express confidence in Australia's Prime Minister Scott Morrison, and the same number (38%) have confidence in India's Prime Minister Narendra Modi. Only a third of Indonesians (34%) have confidence in China's President Xi Jinping and North Korea's leader Kim Jong-un. The lowest-ranked leader on the list is Myanmar's junta leader Min Aung Hlaing, with only three in ten Indonesians (30%) expressing a lot or some confidence in him.

A significant proportion of Indonesians have not heard of regional leaders, with around a third saying they have not heard of the leaders of China, Japan, Singapore, North Korea, Philippines, India and Australia.



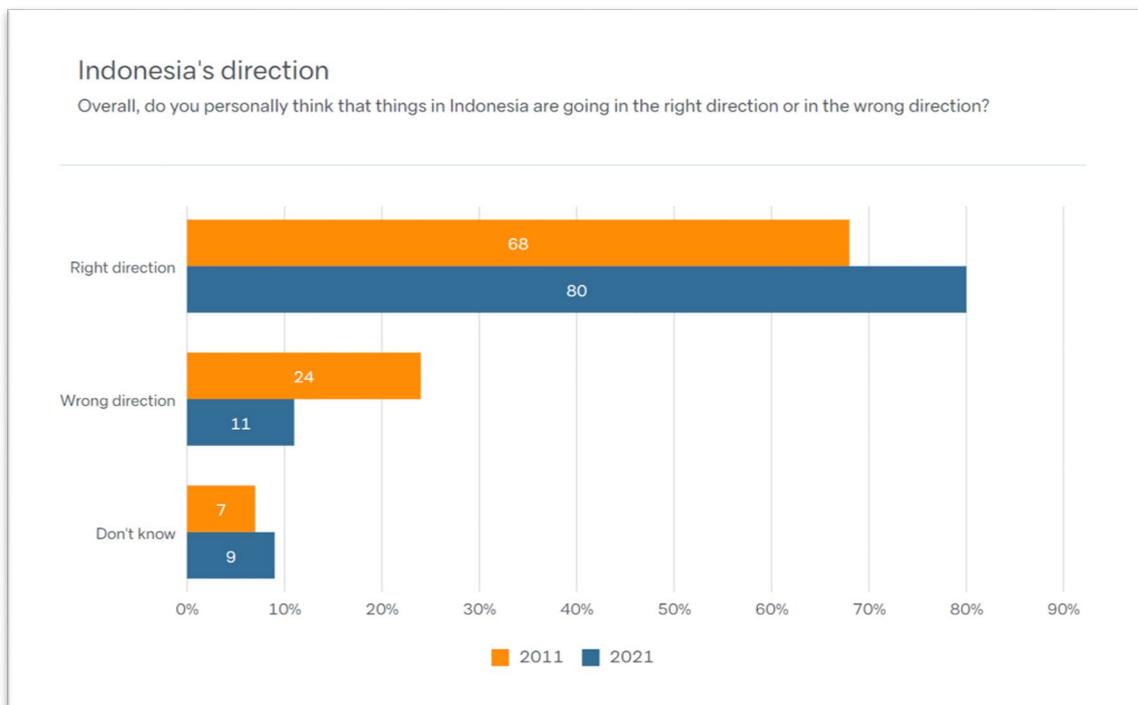
## SECURITY AND THREATS

Despite the Covid-19 pandemic, the increasing impact of climate change, and intensified great power competition in Asia, Indonesians feel safer than a decade ago. The proportion of people who feel ‘safe’ or ‘very safe’ has risen to 74%, from 68% in 2011 and 43% in 2006.



Similarly, the vast majority of Indonesians (80%) say their country is going in the right direction. This marks a 12-point jump since 2011.

When it comes to threats to Indonesia’s vital interests over the next decade, most Indonesians are more worried about internal and non-traditional security threats to their livelihoods and wellbeing than external and traditional security threats such as armed conflict. Many Indonesians appear to be less concerned about potential threats than they were in 2011, but their top concerns remain the same as a decade ago, with four of their top five threats from 2011 found among the top five again in this current poll: separatism, food shortages, international terrorism and potential epidemics.



The top perceived threat for Indonesians is separatism: two-thirds of respondents (67%) say that ‘Indonesia being broken up into several different countries’ poses a critical threat to Indonesia’s vital interests in the next ten years, reflecting longstanding fears about separatism in Indonesia. However, this figure has fallen 11 points in the past decade. Similarly, the number of Indonesians who now see internal unrest as a critical threat has fallen from 82% to 60%.

Six in ten Indonesians (63%) say ‘Covid-19 and other potential epidemics’ pose a critical threat. In 2011, more Indonesians saw ‘AIDS, avian flu and other potential epidemics’ as a threat (73%).

While 63% of Indonesians see food shortages as a critical threat, this figure has fallen 20 points since 2011. The same number (63%) say international terrorism poses a critical threat in 2021, which has also fallen ten points in the past decade.

There are similarly high levels of concern about social or religious intolerance and the idea of foreign intervention or meddling (61% say a critical threat).

Six in ten Indonesians see a severe downturn in the domestic economy (61%) and international financial instability (60%) as critical threats to

Indonesia's vital interests. A similar number (59%) say foreign workers coming to Indonesia pose a critical threat.

The majority of Indonesians (53%) also see fake news and misinformation as critical threats, which aligns with general low levels of trust in news media (see p. 47).

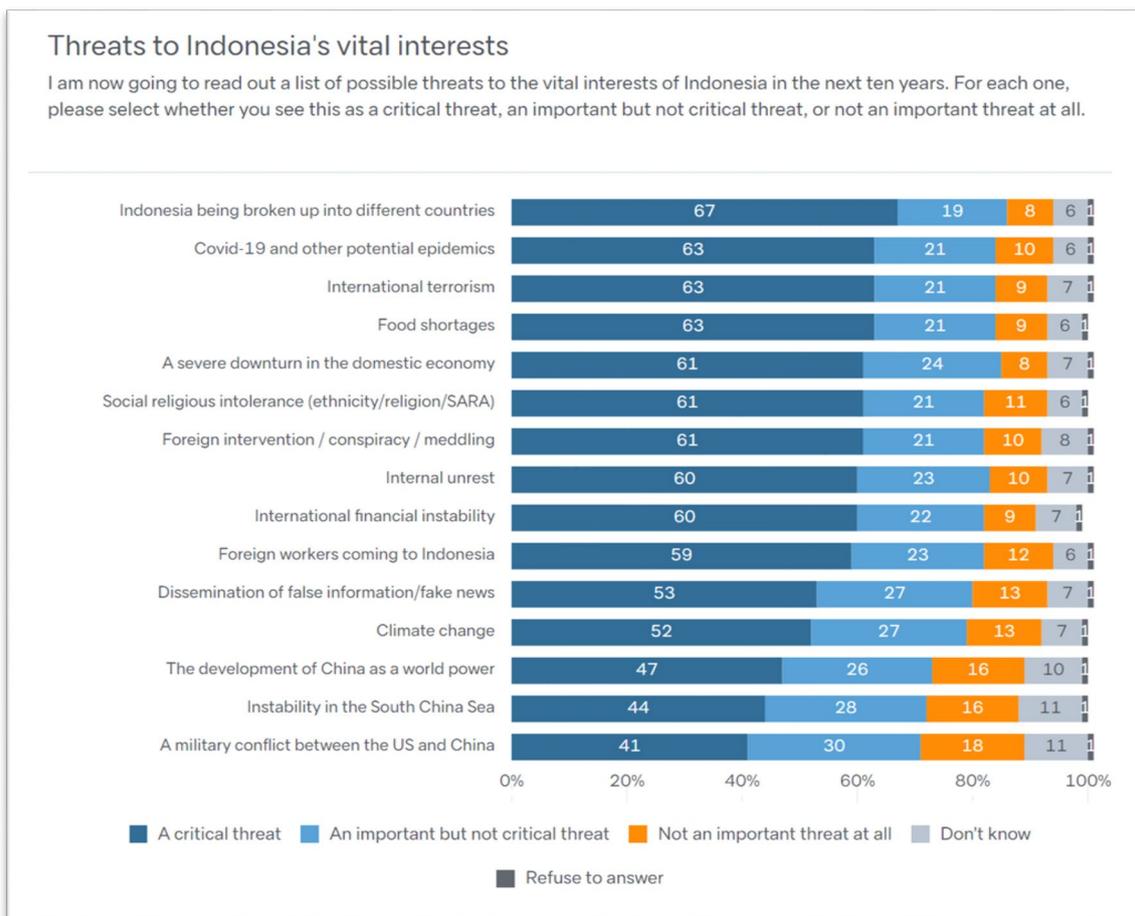
While most views about foreign policy are shared across gender, age and socio-economic status, the level to which great powers are seen as a threat has particular demographic differences.

Muslim respondents are more likely to see both China and the United States as a threat than non-Muslim respondents. Half the Muslim population (50%) say China poses a threat to Indonesia, compared to 32% of non-Muslims. Similarly, 45% of Muslim respondents say the United States poses a threat to Indonesia, a view held by only 28% of non-Muslim respondents. These differences were not nearly as marked when looking at the question of whether other countries posed a threat.

Country threat perceptions also vary across different political party affiliations. Fewer supporters of Partai Demokrasi Indonesia Perjuangan (PDI-P), the party of President Joko Widodo, see China and the United States as a threat than supporters of some other parties. Four in ten Indonesians who lean towards PDI-P (44%) see China as a threat to Indonesia, compared to 60% of voters of Partai Gerakan Indonesia Raya (Gerindra), the party of Prabowo Subianto, the Minister of Defence who twice failed to beat Joko Widodo to the presidency before joining his government in 2019. Some 61% of Partai Keadilan Sejahtera (PKS) voters and 65% of Partai Kebangkitan Bangsa (PKB) voters also see China as a threat. Similarly, only 41% of those who lean towards PDI-P see the United States as a threat, whereas more than half (53%) of those who lean towards Gerindra and PKB see the United States as a threat. Other party preferences were not analysed in this poll due to sample sizes being fewer than 100 respondents, and therefore too small to draw generic conclusions about those voters.

This split in attitudes to China is also reflected when threat perceptions are weighed against which candidate respondents supported in the last presidential election in 2019. Six in ten Prabowo voters (58%) say China is a threat to Indonesia, whereas only 46% of Jokowi voters agree. There is a smaller but still significant gap between attitudes towards the United States as a threat, with 51% of Prabowo voters seeing the United States as a threat to Indonesia's security, compared with 43% of Jokowi voters.

Around half the country (52%) say climate change poses a critical threat to Indonesia’s vital interests, unchanged from 2011 when 54% said global warming posed a critical threat.



Indonesians generally rank China-related concerns much lower on the list of potential threats. Only 47% say ‘the development of China as a world power’ poses a critical threat, although this represents a seven-point increase from 2011 – the only potential threat on the list to increase since 2011. Even fewer express concern about instability in the South China Sea, with 44% saying this is a critical threat. The lowest-ranked threat is a military conflict between the United States and China, which only four in ten Indonesians (41%) see as a critical threat.

The focus on domestic concerns could be related to limited exposure to international issues. The majority (94%) of respondents say they have not travelled abroad. When asked how closely they follow foreign events or affairs, only 17% say ‘very closely’ or ‘somewhat closely’. Four in ten

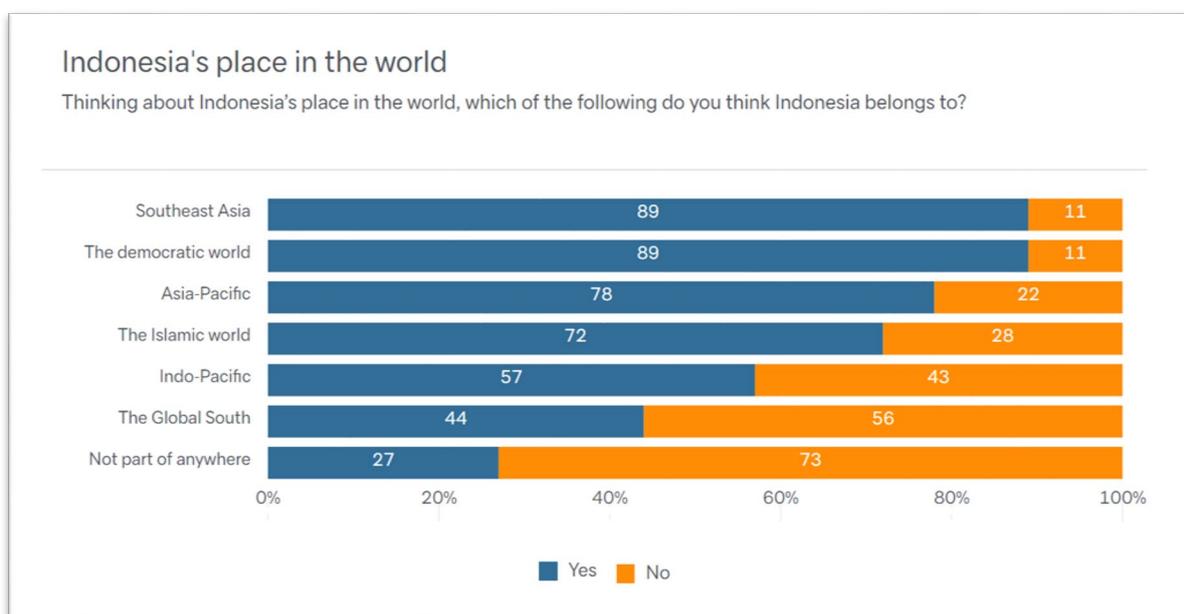
Indonesians (39%) say they follow foreign affairs 'not too closely'. A similar proportion (43%) say they follow foreign affairs 'very little' or 'not at all'.

When asked specifically about countries that threaten Indonesia, a majority of respondents thought that India, Japan, Malaysia, Singapore and Vietnam do not pose a threat to Indonesia's security in the next ten years. China is the country of most concern, with nearly half of Indonesians (49%) seeing it as a threat to their country in the next decade, compared to 43% for the United States and 34% for Australia (see p. 14).

## INDONESIAN FOREIGN POLICY

At a time of increasingly contested and overlapping geopolitical identities, Indonesians have a clear vision of their place in the world that is centred on Asia, Islam and democracy. Around nine in ten respondents (89%) say that Indonesia is part of ‘the democratic world’ and ‘Southeast Asia’, while 78% say Indonesia is part of the Asia-Pacific and 72% say it is part of the Islamic world.

While the Indonesian government has worked to frame Indonesia as a key actor in the Indo-Pacific, only a bare majority — 57% of Indonesians — agree that Indonesia’s place in the world is the Indo-Pacific. Only 44% say that Indonesia belongs to the Global South, despite Indonesia’s traditional role as a promoter of developing county cooperation, dating back to the Asia–Africa (Bandung) Conference of 1955, and recent government efforts to revive that spirit through initiatives such as South–South and Triangular Cooperation (SSTC).



That said, Indonesians’ opinions on major foreign policy have remained remarkably consistent since 2011, with most respondents wanting the government to focus on keeping citizens safe overseas and supporting jobs and the economy at home. This is broadly in line with President Joko’s push for Indonesia to concentrate on economic diplomacy.

As in 2011, Indonesians' three most important ambitions for their foreign policy are 'protecting Indonesian citizens abroad', 'strengthening the Indonesian economy' and 'protecting the jobs of Indonesian workers'. While these remain top priorities for Indonesians, with 91% saying these goals are either 'very important' or 'fairly important' for Indonesian foreign policy, the number of Indonesians who say these are 'very important' priorities has fallen by approximately 20 points since 2011.

The other two top-ranked goals are 'protecting Indonesia's sovereign waters or archipelagic waters' and 'protecting the health of citizens domestically'. Concern about the protection of Indonesian waters comes at a time of continued friction between Jakarta and Beijing over control of Indonesia's exclusive economic zone in the Natuna Sea, and broader concerns about illegal incursions by foreign fishing fleets.

Nine in ten Indonesians (90%) say that 'strengthening Indonesia's trade relations' is either very or fairly important, reflecting domestic economic concerns. A similar proportion (89%) say 'promoting Indonesian businesses overseas' is an important foreign policy goal.

On the whole, Indonesians also see global and regional challenges as important goals, but place a lower priority on them than domestic and trade-related concerns. Many Indonesians describe strengthening international institutions, peace and conflict resolution and other foreign policy goals as 'fairly important', rather than 'very important'.

More than eight in ten Indonesians (87%) say that 'combating international terrorism' is either very or fairly important, unchanged from 2011. A similar number (89%) say that 'strengthening the Association of Southeast Asian Nations' and 'strengthening the United Nations' are important goals for Indonesia, both stable since 2011.

Indonesians are more concerned about climate change than in 2011, with 87% saying that 'tackling climate change' is an important goal, a six-point increase over the past decade. Concern about nuclear weapons has also increased, with 84% saying 'helping to prevent the spread of nuclear weapons' is a very or fairly important goal, up seven points since 2011.

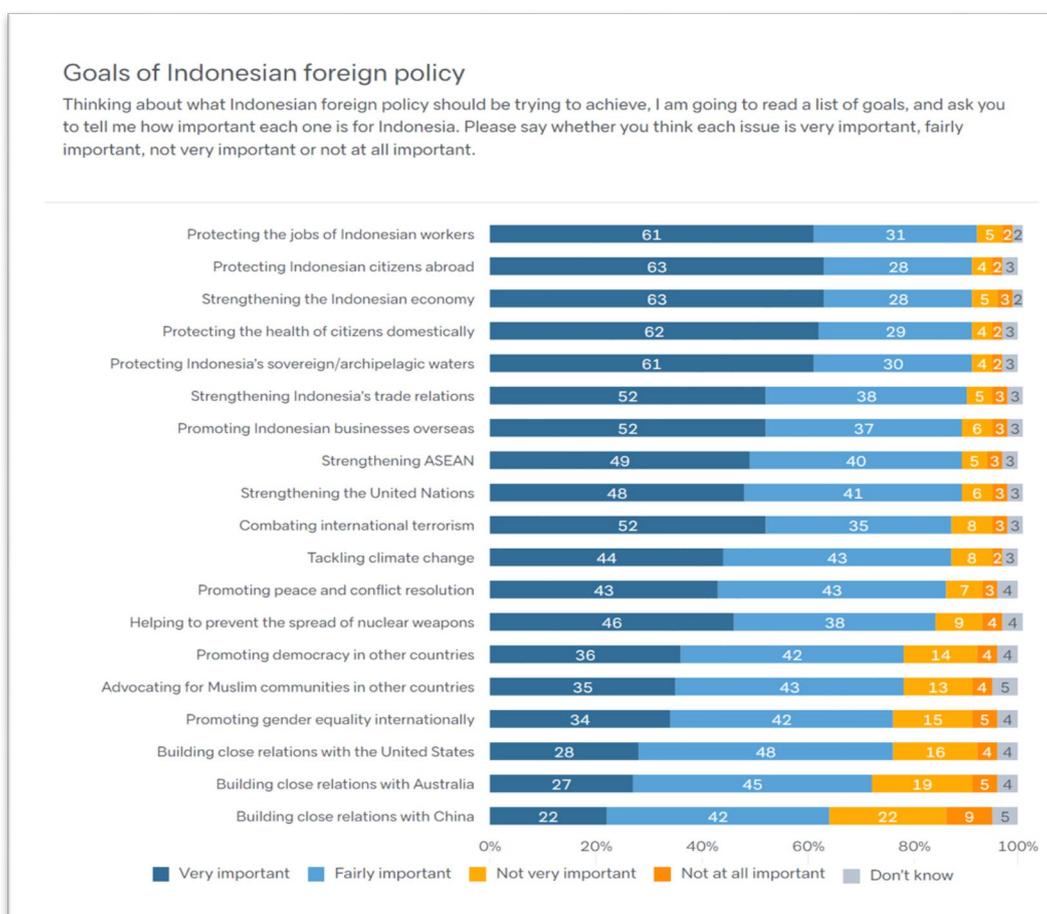
The vast majority of Indonesians (86%) say 'promoting peace and conflict resolution' is an important goal for Indonesian foreign policy. More

*On the whole, Indonesians also see global and regional challenges as important goals, but place a lower priority on them than domestic and trade-related concerns.*

Indonesians than a decade ago see promoting democracy in other countries as an important goal (78%, up 12 points from 2011). The same proportion of Indonesians (78%) say ‘advocating for Muslim communities in other countries’ is a very or fairly important goal. Religious background is an important factor for this question, with 36% of Muslim Indonesians saying advocating for Muslims overseas is a very important goal, compared to 26% of non-Muslim respondents.

Three-quarters of Indonesians (76%) say ‘promoting gender equality internationally’ is a very or fairly important goal. This is a view held regardless of gender, with no significant difference between the views of male and female Indonesians.

Much like in 2011, bilateral relations are seen as the lowest priority goal for many Indonesians. Three-quarters of Indonesians (76%) see ‘building close relations with the United States’ as important, which has not changed since 2011. A similar number (72%) say ‘building close relations with Australia’ is important, which has fallen eight points since 2011. At the

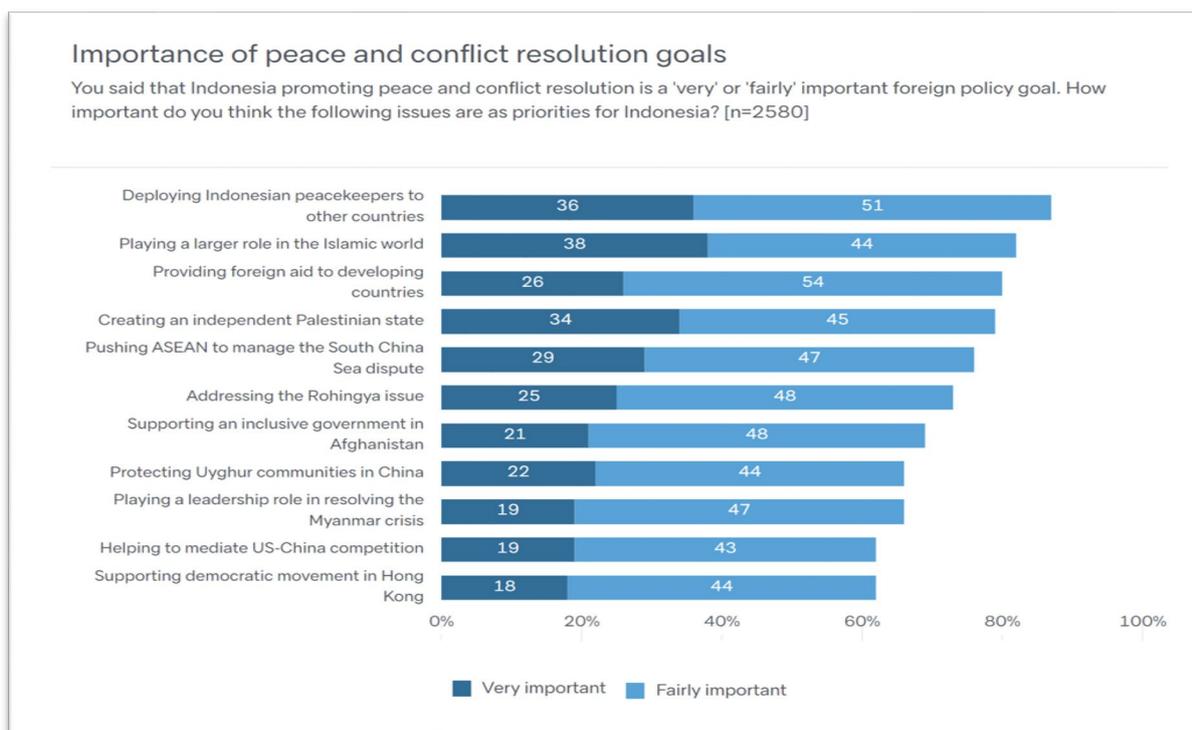


bottom of the list is ‘building close relations with China’, an important goal for 64% of Indonesians, which represents a six-point decline since 2011.

As Indonesia becomes wealthier, modernises its military and raises its voice abroad, there are growing expectations that Jakarta will take a more proactive and sustained role, if not leadership, in responding to global conflicts.

The 86% of respondents who see ‘promoting peace and conflict resolution’ as a very or fairly important goal for Indonesian foreign policy are broadly supportive of some of the Indonesian government’s recent steps to promote peace and stability. Their top priorities for Indonesia’s peace and conflict resolution agenda are: deploying Indonesian peacekeepers to other countries (87% saying important), playing a larger role in the Islamic world (82%), providing foreign aid to developing countries (80%) and creating an independent Palestinian state (79%).

The support for providing foreign aid to developing countries suggests some backing for the government’s new Indonesian Agency for International Development, which was launched in 2019. Thinking about other diplomatic initiatives taken by Jakarta in recent years, 73% say that addressing the Rohingya issue is important, 69% say that supporting an

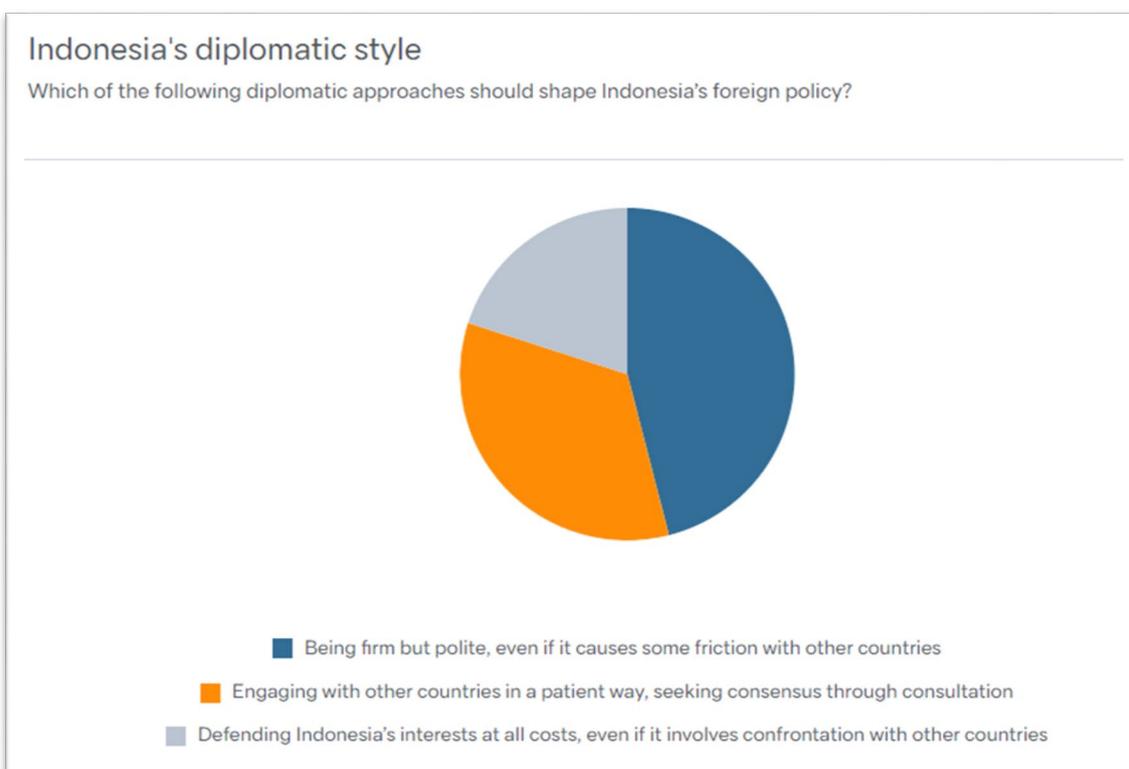


inclusive government in Afghanistan is important, and 66% say that playing a leadership role in resolving the Myanmar crisis is important.

When it comes to regional security, three-quarters (76%) say that it is important for Indonesia to push ASEAN to manage the South China Sea disputes. But other China-related challenges are seen as less important: two-thirds of Indonesians (73%) say it is important to protect Uyghur communities in China, and fewer (62%) see ‘helping to mediate US–China competition’ and ‘supporting the democratic movement in Hong Kong’ as important goals for Indonesia.

Despite sharing some of the government’s key foreign policy objectives, only a quarter of Indonesians have heard of the government’s signature ‘independent and active’ (*bebas dan aktif*) foreign policy principle.

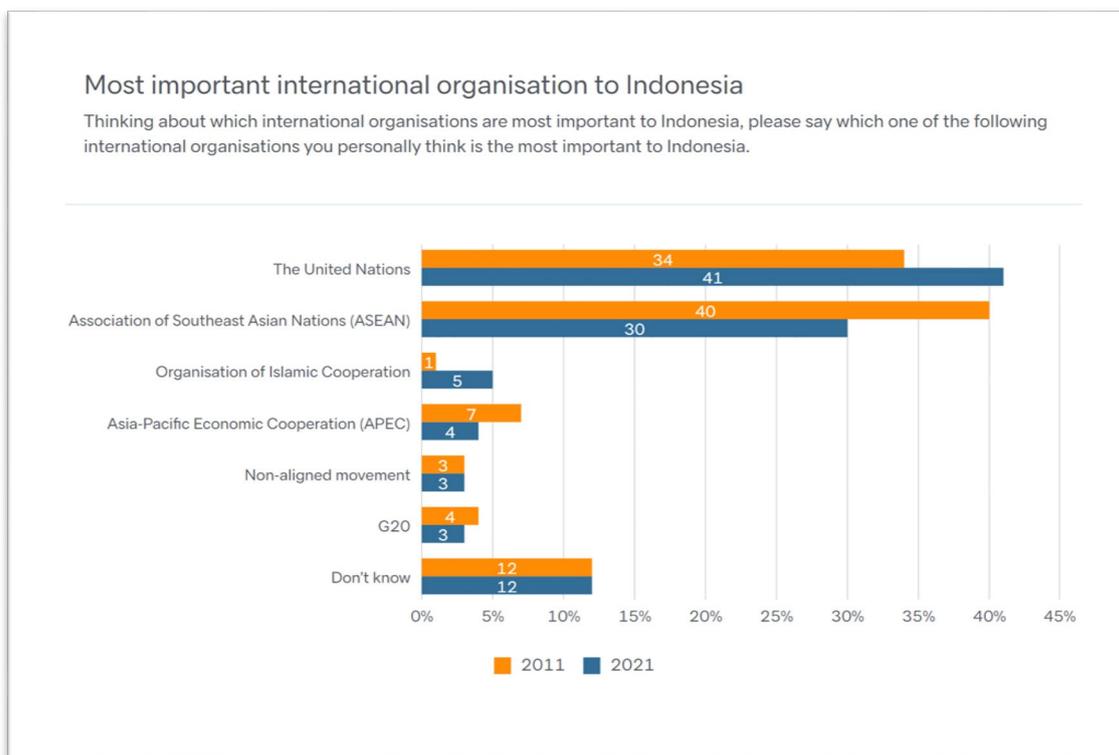
The principle was first laid out by Mohammad Hatta, one of the country’s founders, following Indonesia’s revolutionary struggle to secure independence from the Netherlands after the Second World War and during the early days of the Cold War. The principle embodies Indonesia’s desire to play a proactive role in world affairs without siding with any great powers. It was also a politically expedient principle to avoid Cold War-induced domestic polarisation and instability.



Of those who have heard of the independent and active principle, 45% say they have a ‘good understanding’ of what it is about, 42% have a ‘vague idea’, and 13% have ‘no idea at all’. And among those who have a good or vague idea about the policy, there is overwhelming support, with 90% saying Indonesia should maintain the independent and active principle.

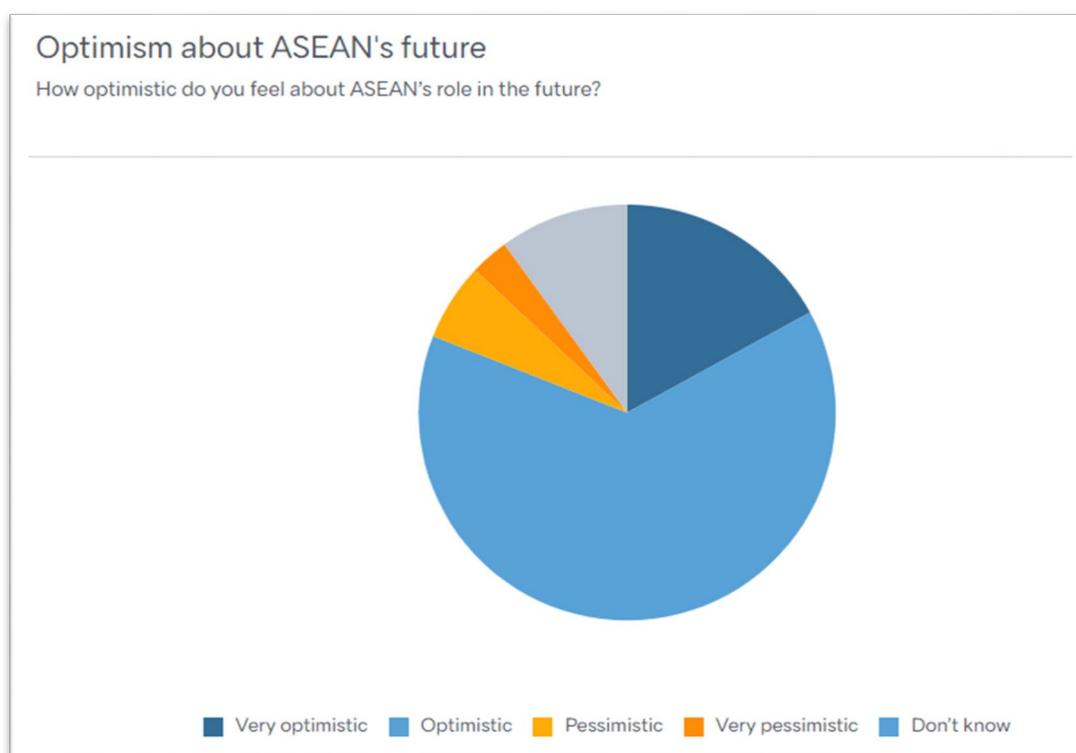
Enthusiastic nationalism is a prominent element of the public, media and political debates about Indonesia’s place in the world, as it is in many countries. But in terms of diplomatic style, only one in five respondents (20%) say they want to see the government ‘defending Indonesia’s interests at all costs, even if it involves confrontation with other countries’. Some 46% say they favour the government taking a middle path ‘being firm but polite, even if it causes some friction with other countries’. And just over one in three (34%) wants to see Jakarta taking what some would regard as a traditional Javanese approach, ‘engaging with other countries in a patient way, seeking consensus through consultation’.

Although Indonesia often frames its foreign policy through its membership of ASEAN, only three in ten people (30%) say that ASEAN is the most important organisation for Indonesia, a ten-point fall since 2011. The United Nations now sits at the top of important organisations for Indonesians, with 41% saying the United Nations is the most important



international organisation to Indonesia, an increase of seven points since 2011.

Almost no Indonesians say the G20, which Indonesia is currently chairing, is the most important organisation to Indonesia. Despite the centrality of the 'Islamic world' and 'Asia-Pacific' to Indonesia's regional and global identity, the Organisation of Islamic Cooperation, Asia-Pacific Economic Cooperation, and the Non-Aligned Movement all receive results in the single digits.



Overall, 81% of Indonesians are 'optimistic' or 'very optimistic' about ASEAN's role in the future, but only 17% of those are 'very optimistic'. Although ASEAN has faced growing challenges in recent years, including its responses to the pandemic, great power competition, and the Myanmar crisis, these responses suggest little change since ASEAN's own polling in 2018, which found that 88% of Indonesians are optimistic about the organisation's future success, compared to 78% of ASEAN citizens.<sup>1</sup> Future research might be needed to understand the sources of such

<sup>1</sup> ASEAN Secretariat, "Poll on ASEAN Awareness 2018", 2 December 2019, <https://asean.org/poll-on-asean-awareness-2018/>.

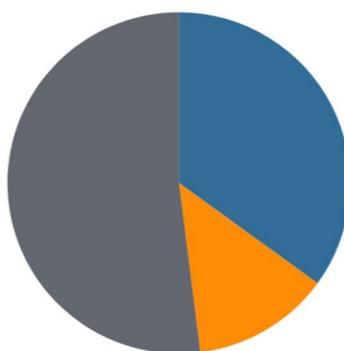
optimism, especially given the decline of ASEAN’s importance compared to the United Nations among the Indonesian public.

Like a growing number of other countries, Indonesia has explored a range of minilateral partnerships to complement its bilateral and multilateral diplomacy, including MIKTA (made up of Mexico, Indonesia, South Korea, Turkey and Australia) and the Indonesia–India–Australia trilateral. Although the country has had a longer history of minilateral cooperation, such as the Malacca Straits Patrol and the Indonesia–Malaysia–Singapore Growth Triangle, only one in three (35%) say that they would support ‘Indonesia forming partnerships/minilaterals with other middle powers and neighbours depending on different issues and interests’, and 13% say they would oppose such partnerships. But the response of the majority (52%) to this question is to say they did not know.

Of those who support the minilateral approach, Japan is far and away the top partner of choice, backed by 46% of these 1,046 respondents. Next comes neighbouring Singapore (14%), Australia (13%) and Malaysia (10%), all of which already participate in a range of different minilateral initiatives with Indonesia. A mere 5% support minilateral cooperation with China, and there is no support for minilaterals with other Southeast Asian neighbours, including the Philippines, Thailand, Timor-Leste and Vietnam.

### Support for joining minilaterals

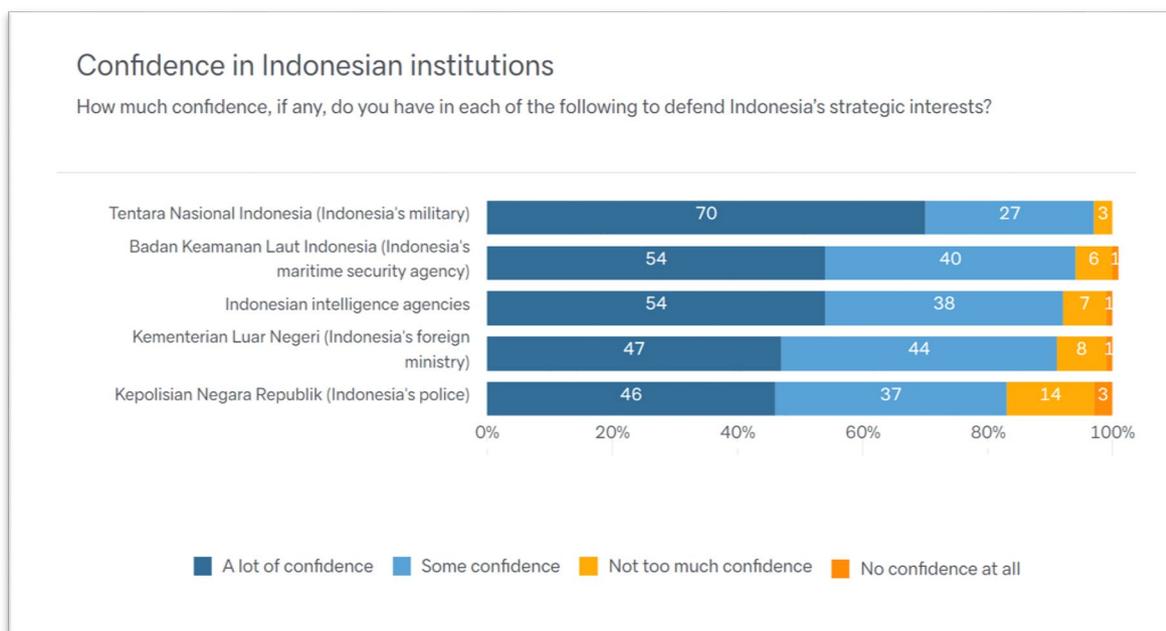
Would you support or oppose Indonesia forming partnerships or minilaterals with other middle powers and neighbours depending on different issues and interests?



■ Support ■ Oppose ■ Don't know

**Confidence in institutions**

Overall, Indonesians have a very high degree of confidence in their national security institutions to defend Indonesia’s strategic interests, with more than nine in ten people having some or a lot of confidence in these organisations.



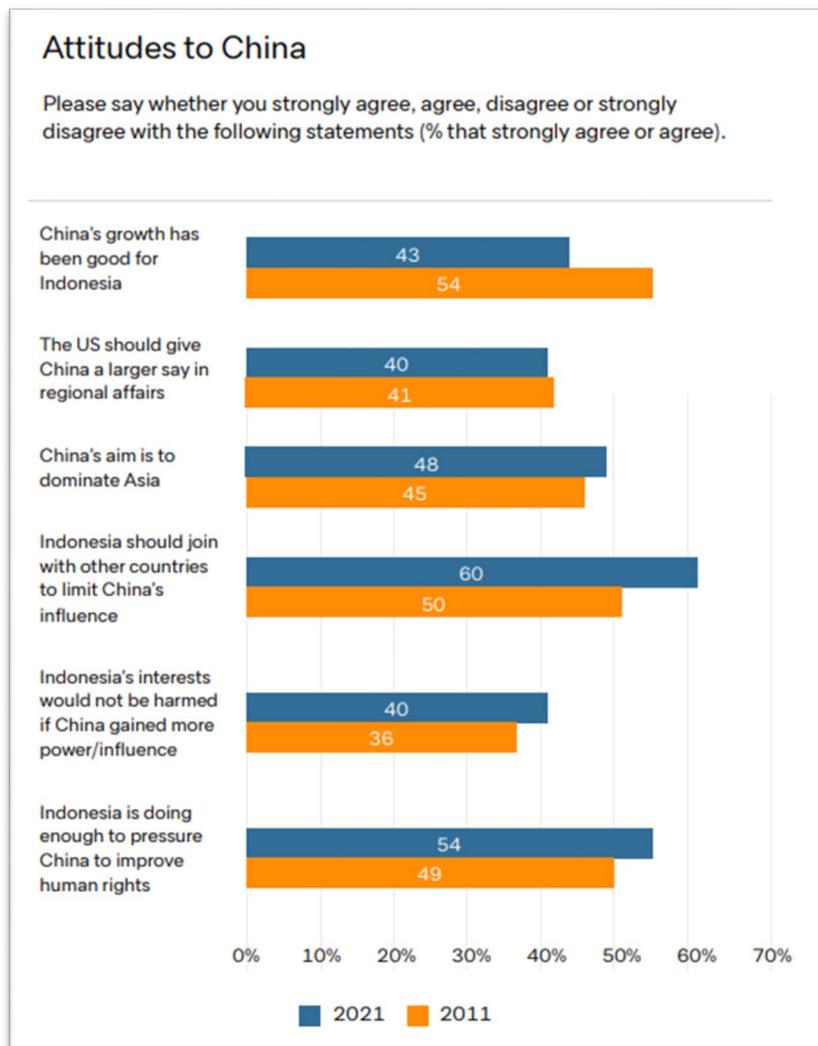
The Indonesian Armed Forces receive the highest vote of confidence, with almost all Indonesians (97%) having ‘a lot of confidence’ or ‘some confidence’ in their military to defend Indonesia’s interests. A remarkable 70% of Indonesians have a lot of confidence in the military to defend the country from external threats. This seems to follow the military’s high public approval rating over the past decade. There are also very high levels of confidence in Indonesia’s maritime security agency (94%) and intelligence agencies (92%). Most Indonesians have either a lot or some confidence in the foreign ministry (91%) and Indonesian police (83%).

When asked about external threats specifically, rather than broader strategic interests, Indonesians continue to demonstrate high levels of confidence in the military. Six in ten Indonesians (62%) have a lot of confidence in the Indonesian military to defend Indonesia from external threats, with 34% saying they have some confidence.

## UNITED STATES–CHINA

Trust in both China and the United States has clearly declined amongst Indonesians, but more negativity exists in relation to China. There is also a significant increase in the number of Indonesians that wish to see Indonesia playing a more significant role in relation to China.

In policy areas typically seen as China’s stronghold — economy and investment — its standing has declined relative to the United States. For example, when asked which country is the most important for Indonesia’s economy, 18% choose the United States, while 12% say China. Four in ten Indonesians (42%) are in favour of investment from the United States,

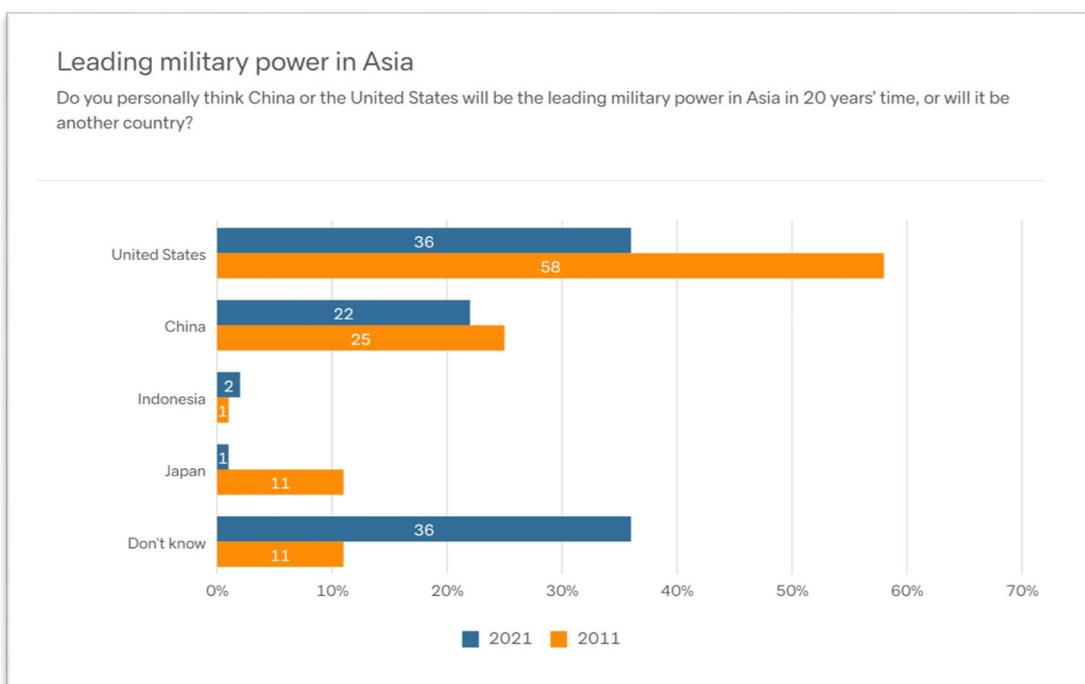


compared to 30% with regard to investment from China (see p. 40). In 2011, the majority of Indonesians said China would be Asia’s leading economic power — a view now held by only 31% of Indonesians, a 21-point fall in the past decade.

More broadly, in a side-by-side comparison across different questions, China ranks less favourably than the United States across a range of indicators, from military and economic leadership, and influence and security concerns, to ‘soft power’ benchmarks such as education and work destinations (see p. 50).

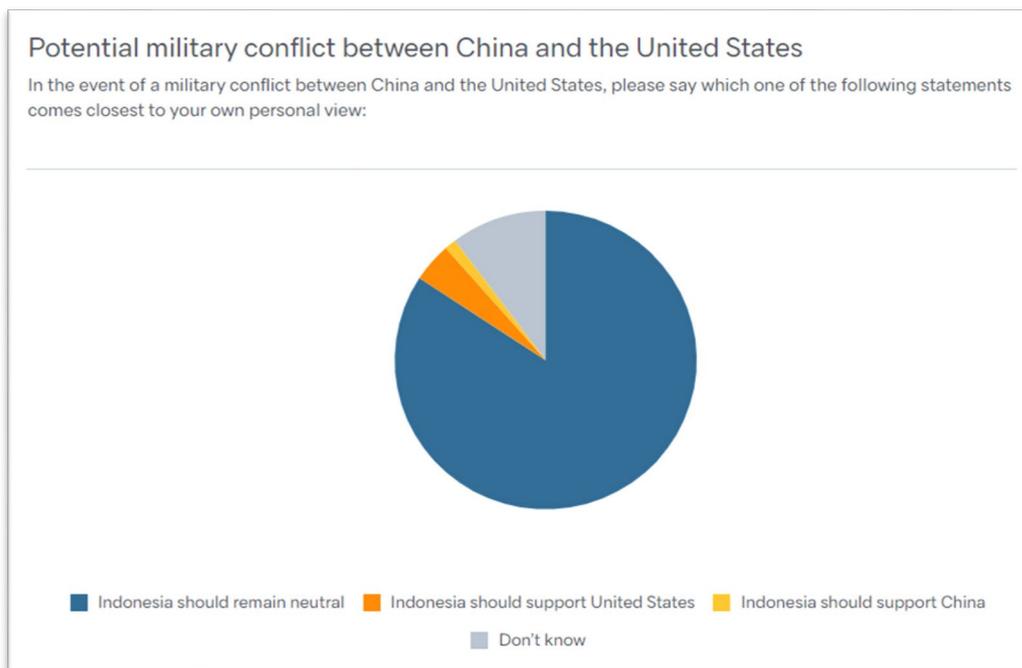
Six in ten Indonesians (60%) either strongly agree or agree that ‘Indonesia should join with other countries to limit China’s influence’, an increase of ten points since 2011. However, the majority of Indonesians (55%) now agree that ‘Indonesia is doing enough to pressure China to improve human rights’.

In a significant 11-point decline, only 43% of Indonesians now say that ‘China’s growth has been good for Indonesia’, a view previously held by the majority (54% in 2011). Almost half the population (48%) agree that China’s aim is to dominate Asia, and four in ten (40%) say ‘the United States should give China a larger say in regional affairs’. Despite this, only a minority (40%, up four points from 2011) say ‘Indonesia’s interests would not be harmed if China gained more power and influence’.

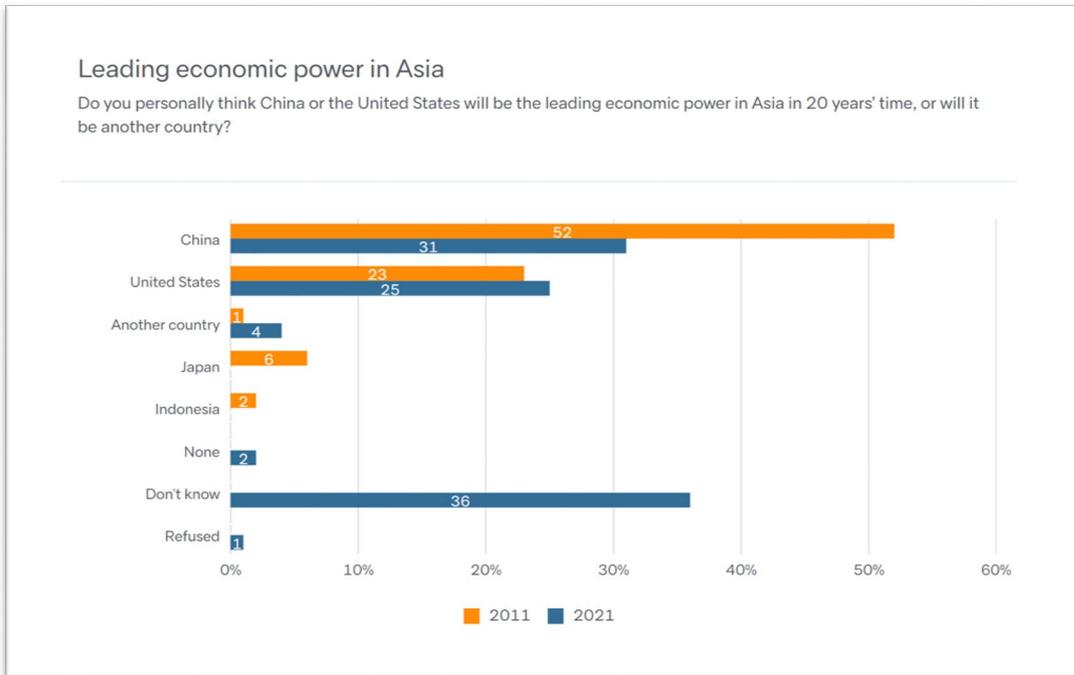


The Indonesian public seems uncertain about the consequences of US–China great power competition in the region. When asked about whether China or the United States will be the leading military power in Asia in 20 years, around a third of Indonesians (36%) say the United States will be Asia’s leading military power, a 22-point fall from 2011. Around a fifth (22%) say China will be Asia’s leading military power, and a striking 36% say that they do not know which country will be Asia’s leading military power in 20 years.

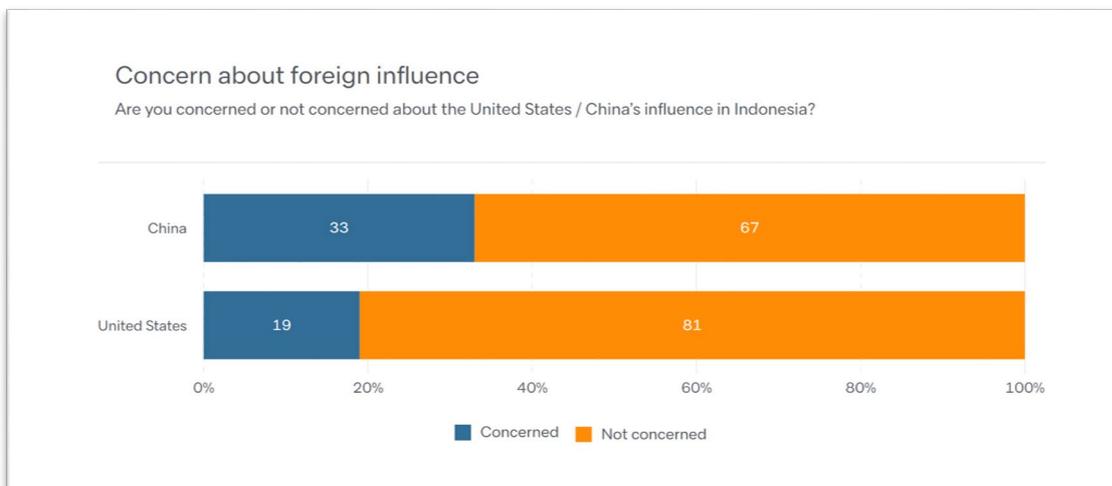
Indonesians are divided on many issues, but there is overwhelming consensus on the question of great power conflict. A significant 84% of Indonesians say that in the event of a potential conflict between the United States and China, Indonesia should remain neutral. A mere 4% say that Indonesia should support the United States, and 1% say Indonesia should support China.



In 2011, when asked about which economy would be the leading power in Asia in 20 years, the majority of Indonesians said China would be Asia’s leading economic power — a view now held only by 31% of Indonesians, a 21-point fall in the past decade. A quarter (25%) say that the United States will be the leading economic power in Asia in 20 years, similar to the 2011 result. Again, a large percentage of respondents (36%) did not know which country would be the region’s leading economic power.

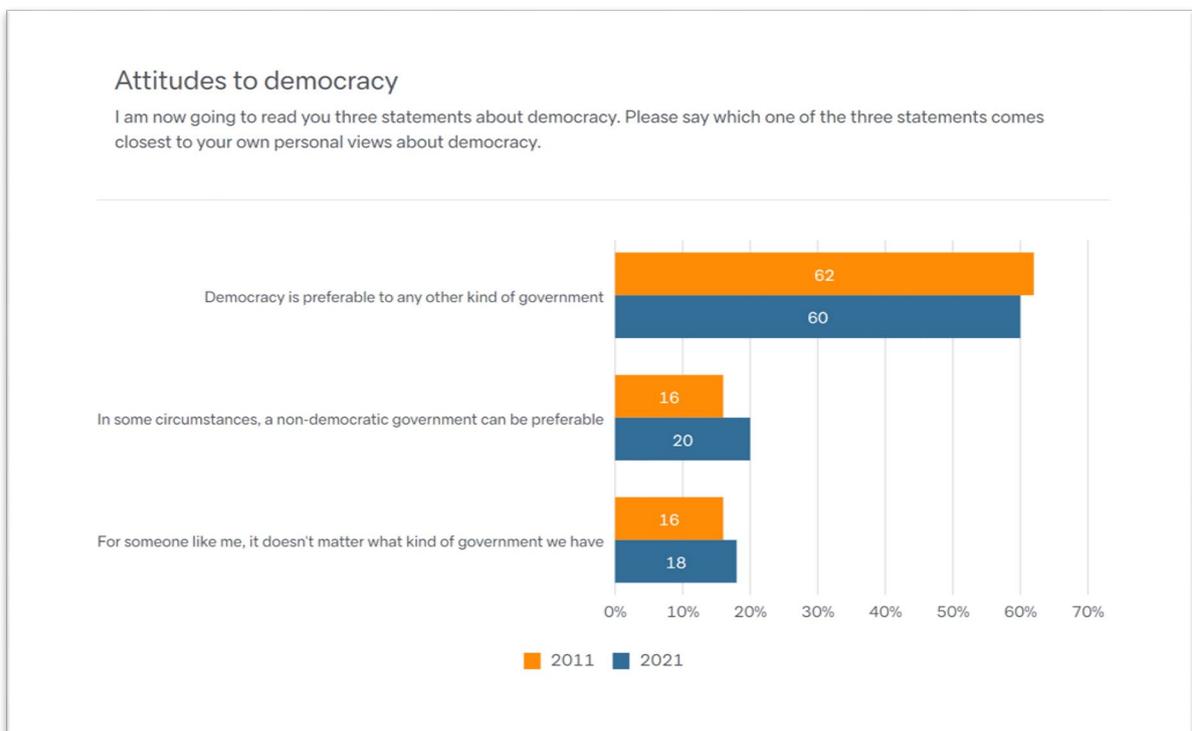


Indonesians appear to have low levels of concern about foreign interference (see p. 34.) Only 33% say they are concerned about China’s influence in Indonesia, and some of the main reasons they offer include the dominance of Chinese companies in the Indonesian economy and concerns about the number of Chinese workers in Indonesia. Even fewer Indonesians (19%) are concerned about the United States’ influence in Indonesia. When asked about the source of their concerns, some express anxiety about the influence of the US economy and the fear that American culture is ‘too free’.



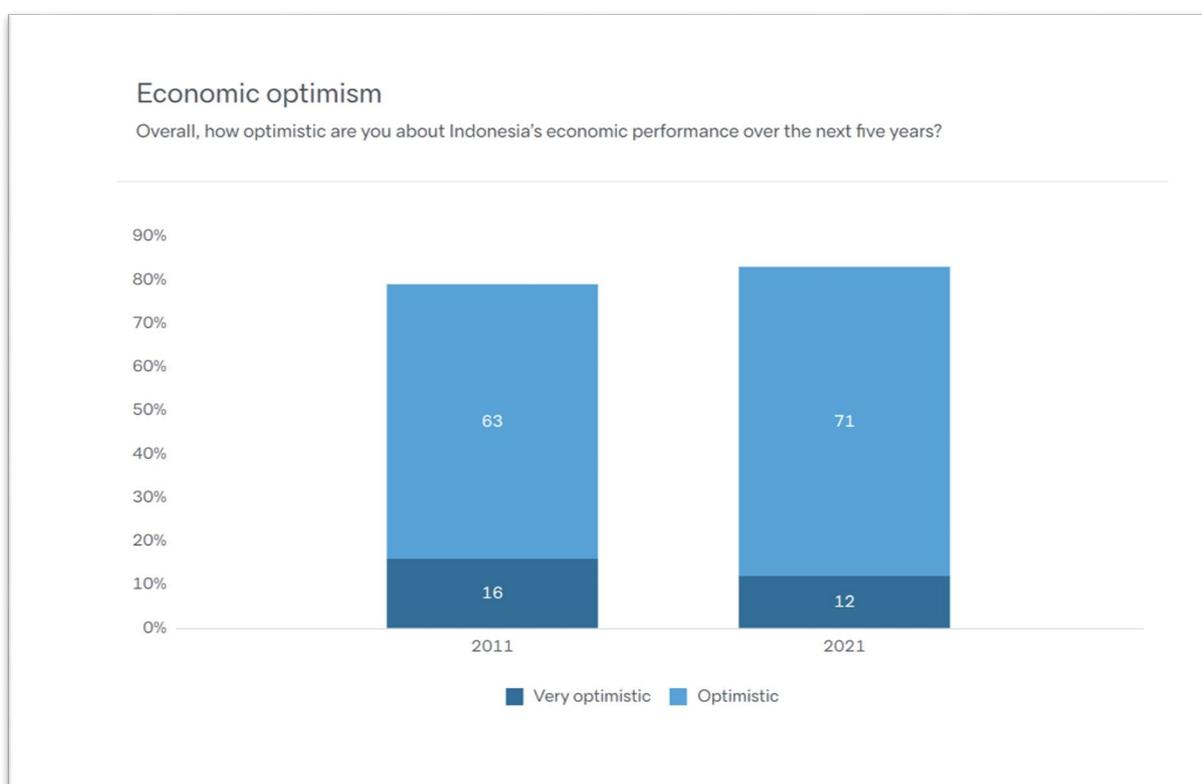
## DEMOCRACY

Indonesian activists and academic experts are increasingly concerned about democratic backsliding in their country amid global evidence of a decline in the quality of democracy. Indonesians themselves are broadly as committed to democracy as they were a decade ago. Six in ten believe that ‘democracy is preferable to any other kind of government’, a very slight decline since 2011. There has also been a modest increase in the proportion of people who believe that ‘in some circumstances, a non-democratic government can be preferable’, up to 20% from 16% in 2011.



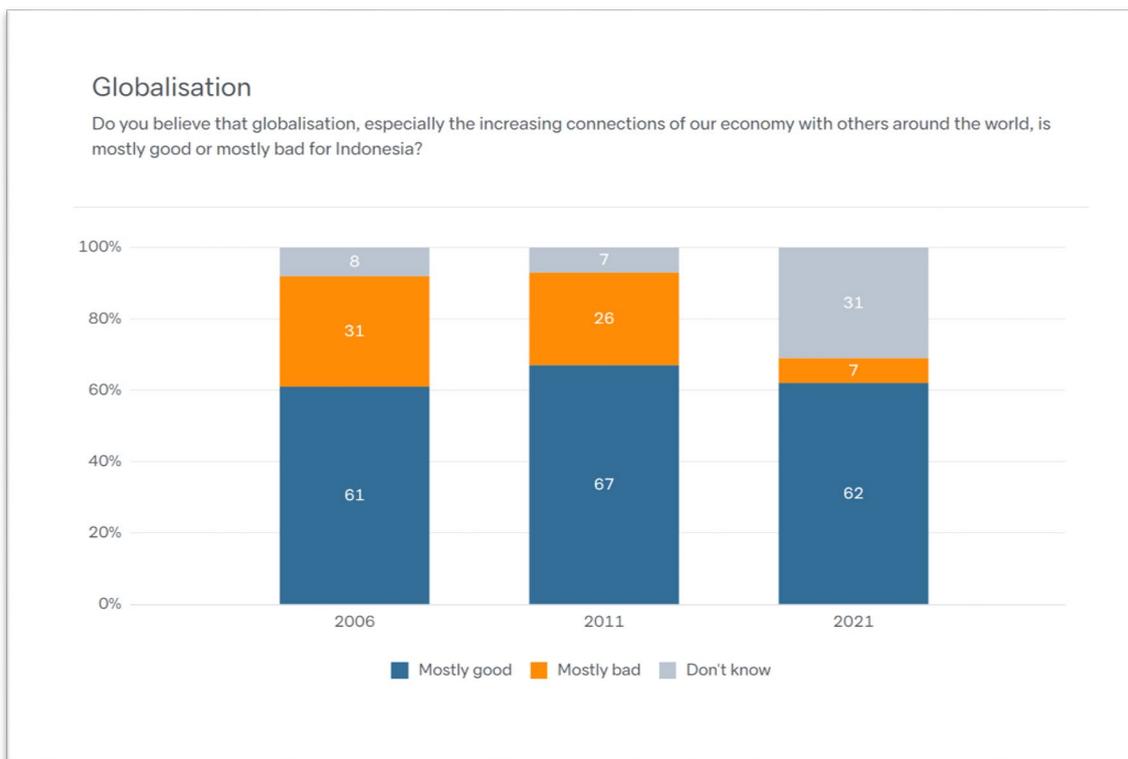
## ECONOMY AND INVESTMENT

Even as Indonesia slumped into its first recession since the Asian financial crisis of 1998, Indonesians remain confident about their economic prospects. Just over 82% are ‘optimistic’ or ‘very optimistic’ about their country’s economic performance over the next five years, a slight increase from 79% in 2011. But the number of people who are ‘very optimistic’ slipped over the same period to 12% from 16%.



While the pandemic has sparked global fears about rising protectionism, Indonesians are still broadly in favour of globalisation and not overly concerned about its downsides. The 2021 poll shows that 62% believe globalisation is ‘mostly good’ for Indonesia, down from 67% in 2011, but returning to 2006 levels. The proportion of people who think that globalisation is ‘mostly bad’ dropped to just 7% from 26% in 2011. But significantly more Indonesians are unsure about the impact of globalisation compared to previous years.

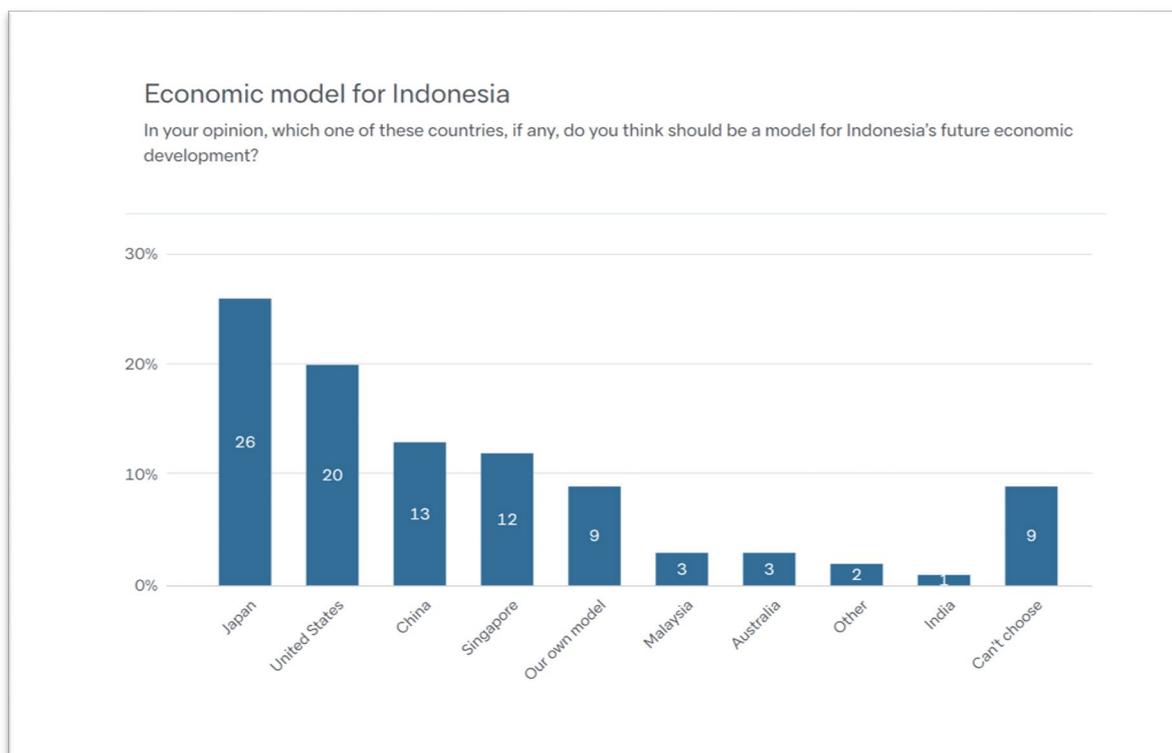
Support for globalisation, and optimism about Indonesia’s economy, are shared across a range of demographic groups in Indonesia, including respondents of different socio-economic levels and ages, and across rural and urban residents.



When considering their options, more Indonesians think that the Southeast Asia region and the United States are the most important economies for Indonesia, with 18% choosing Southeast Asia and the United States. Japan (15%) and China (12%) come next, followed by Australia (7%) and the European Union (5%). Some 21% think Japan is the second most important economy for Indonesia, followed by the United States (19%), Southeast Asia (16%), China (13%), Australia (11%) and the European Union (9%).

But most Indonesians do not see their Southeast Asian neighbours as role models when it comes to the economy. Japan and the United States are the countries that Indonesians are most likely to see as models for Indonesia’s future economic development. More than a quarter of respondents (26%) say that Indonesia should follow Japan’s lead on economics, followed by the United States (20%). Around 13% opt for China, 12% for Singapore and 3% each for Australia and Malaysia. Just

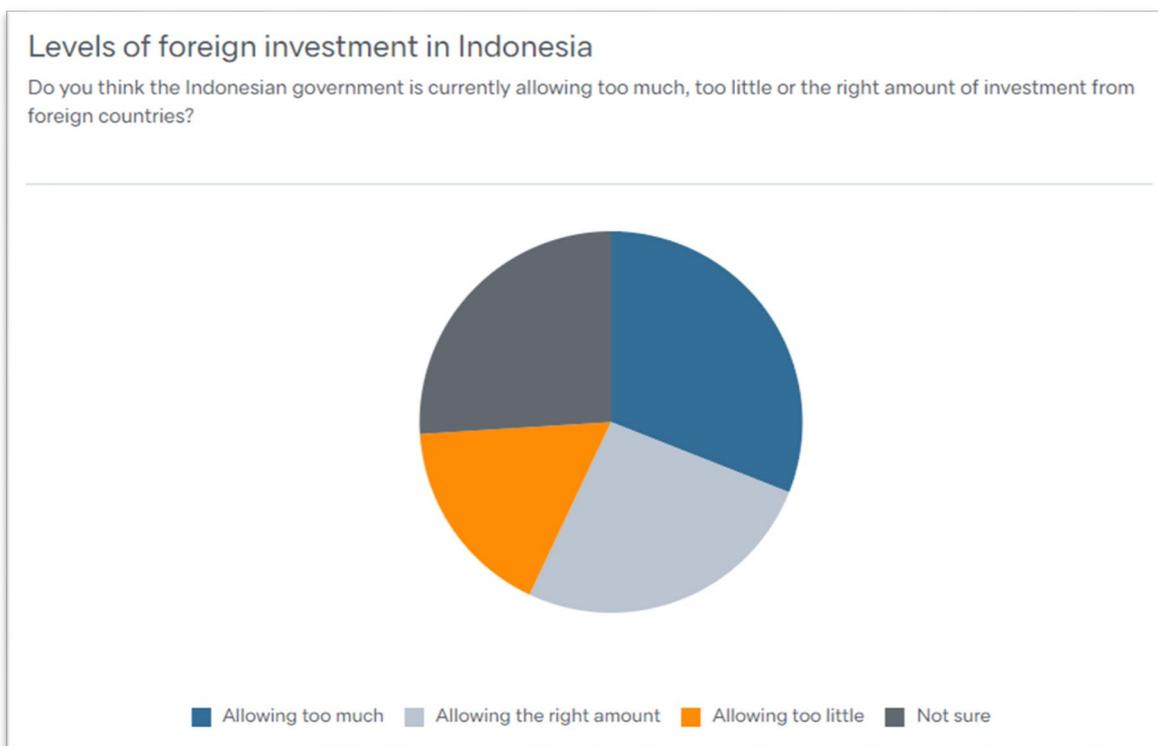
over 9% say that Indonesia should follow its own model rather than seeking to emulate any other country.



Since he was elected in 2014, Indonesian President Joko Widodo has made it a core mission to attract more foreign investment, enacting a controversial ‘omnibus law’ on job creation in 2020 that was designed to reduce the barriers for overseas investors. But Indonesians remain divided on their attitudes to foreign investment. Three in ten Indonesians (31%) say that the government is allowing too much investment, while 17% say the government is allowing too little. Just over a quarter of respondents (26%) think the government is allowing the right amount of foreign investment, while another quarter (26%) are not sure. Of those who think that Indonesia is allowing too much investment, 58% think that the government is allowing too much investment from China and 13% think it is allowing too much investment from the United States.

Indonesians appear to feel differently about foreign investment from different countries, with China eliciting the most negative reaction and Saudi Arabia the most positive. Only 30% of Indonesians say they are in favour of a company, bank or investment fund from China buying a controlling stake in a major Indonesian company. By contrast, 57% of

respondents are in favour of a Saudi Arabian institution purchasing a controlling investment in a major Indonesian company.



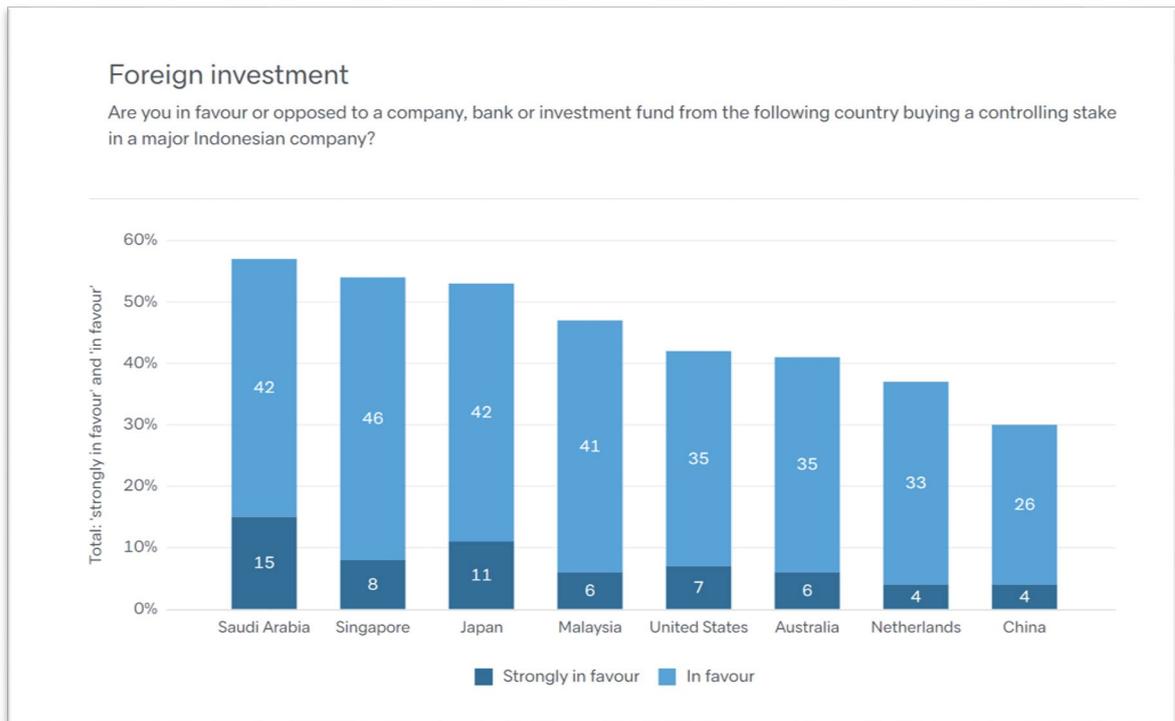
A majority (53%) say they favour investments from Japan and Singapore, while slightly less than half (47%) favour investment from Malaysia. There appears to be less support for investment from Western countries. Around four in ten favour investment from the United States (42%) and Australia (41%). Only a third of Indonesians (37%) favour investment from the Netherlands.

Indonesians are very supportive of international development assistance with 87% saying that it has been ‘mostly good’ or ‘very good’ for Indonesia. When asked which countries provide Indonesia with the most foreign aid at the moment, a quarter (24%) say the United States, followed by China (16%), Saudi Arabia (12%), Japan (11%) and Australia (7%).

Around 19% say the United States gives the second most aid, with 17% selecting Japan, 13% Saudi Arabia, 12% Australia and 10% China.

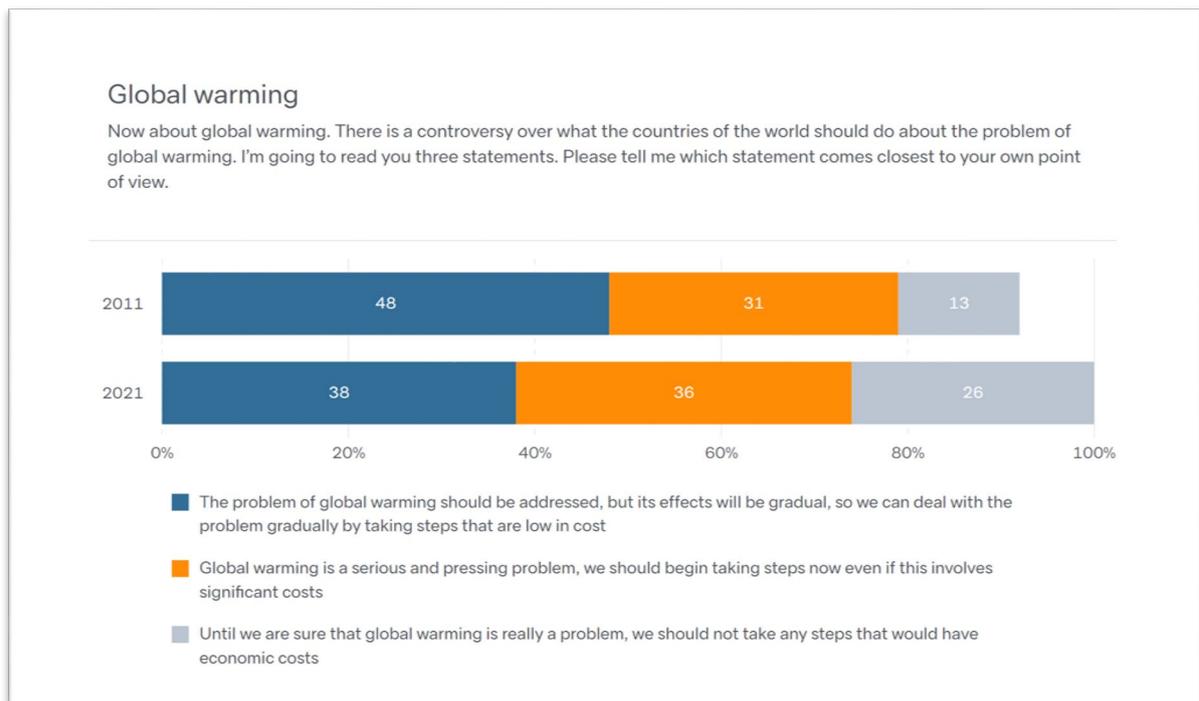
Data from the Organisation for Economic Cooperation and Development (OECD) on official development assistance commitments to Indonesia from 2015 to 2019 show that the biggest bilateral donor in that period was

Japan, followed by Germany, France, Australia, the United States, South Korea, Norway, Saudi Arabia, Switzerland and the United Kingdom. As a non-traditional donor, China does not submit its aid data to the OECD.



## CLIMATE CHANGE

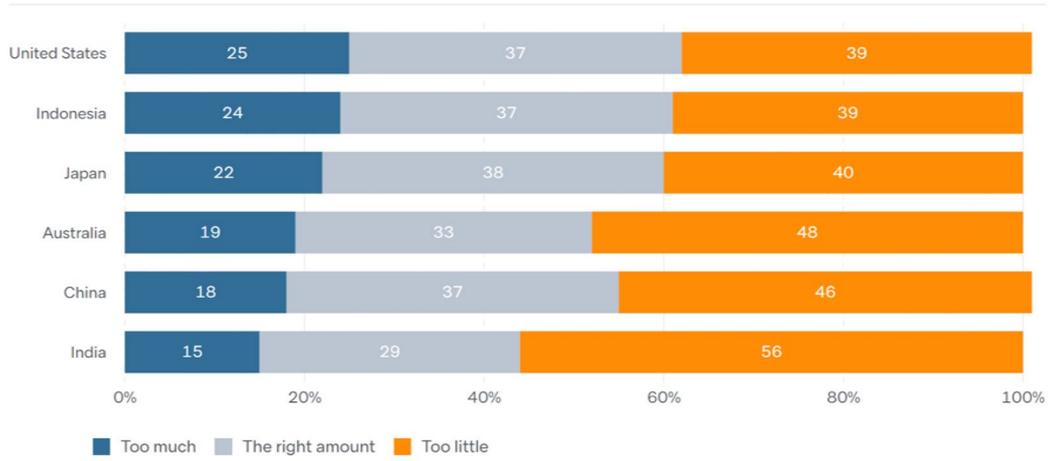
Even as their country has been buffeted by extreme weather events, Indonesians remain divided on how their government should respond to climate change. The number of people who believe that ‘global warming is a serious and pressing problem’ and that Indonesia ‘should begin taking steps now even if this involves significant costs’ has risen from 31% in 2011 to 36%. But the proportion of respondents who believe that ‘until we are sure that global warming is really a problem, we should not take any steps that would have economic costs’ doubled from 13% in 2011 to 26% in 2021. Meanwhile, the proportion who feel that Indonesia can ‘deal with the problem gradually by taking steps that are low in cost’ fell from 48% in 2011 to 38%.



Indonesians are also divided in their assessments of how their own and other countries are responding to climate change. India is perceived as the worst laggard, with 56% saying it is doing too little, followed by China (48%) and Australia (46%). Indonesians view the responses of Japan and the United States in a similar light to that of their own government, with around 39% saying these countries are doing too little.

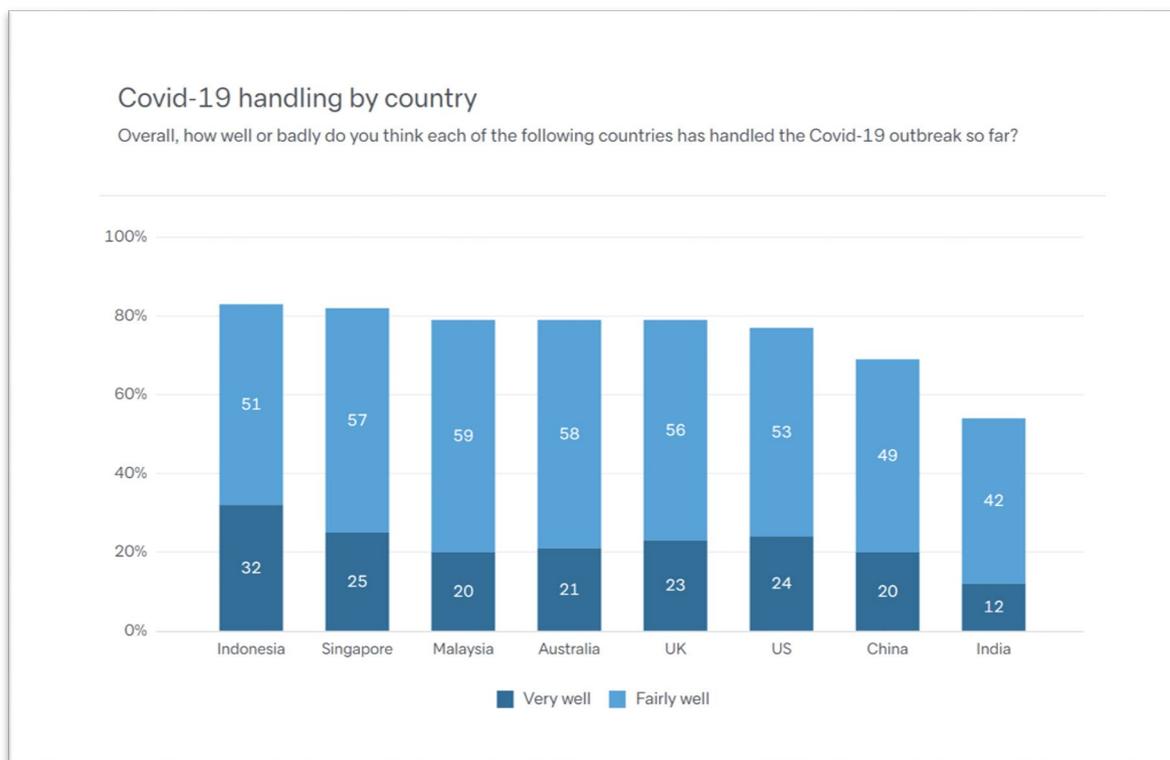
### Effort to combat climate change

For each of these countries, do you think they have done too much, too little, or about the right amount in their effort to combat climate change?



## COVID-19

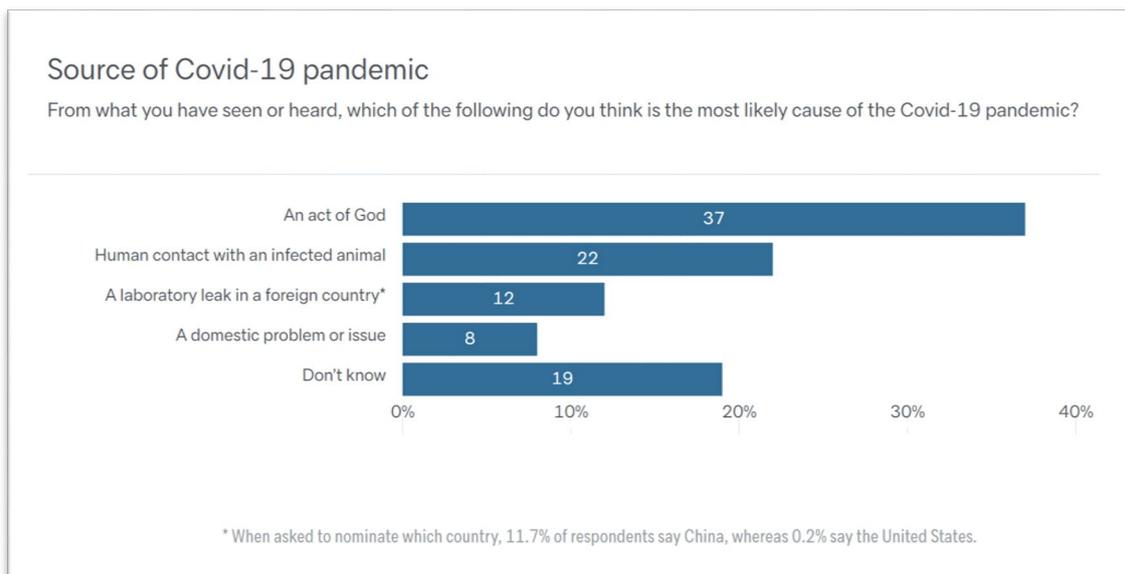
There has been much debate about the extent to which different countries' responses to and effectiveness in handling Covid-19 has impacted their global standing. But Indonesian perceptions of how other countries handled the pandemic do not seem closely correlated to the different approaches that countries have taken. Respondents rated Indonesia's response the highest, with 83% saying that their country has managed Covid-19 'very well' or 'fairly well'. Singapore, which has maintained tight border and social restrictions throughout much of the pandemic, receives similarly high praise with 82% saying the country has done well. Around eight in ten Indonesians say the United States, United Kingdom, Australia and Malaysia have handled the pandemic well, even though these countries have taken divergent approaches to border controls and lockdowns. Fewer Indonesians (69%) say China has handled things well, while they regard India as having performed worst, at 54%.



As in other countries, there are conspiracy theories and misinformation swirling around social media in Indonesia about the causes of the Covid-19 pandemic. Globally, certain Chinese officials and state media outlets have tried to promote disinformation that suggests the pandemic

originated from a laboratory leak in the United States. The US government, for its part, has investigated whether Covid-19 originated from a laboratory leak in China, but has not found conclusive evidence of the origins of the pandemic. Overall, very few Indonesians believe the lab leak theory, although 11.6% say that a lab leak in China is the most likely cause of the pandemic, compared to just 0.2% who believe that it came from a US lab leak.

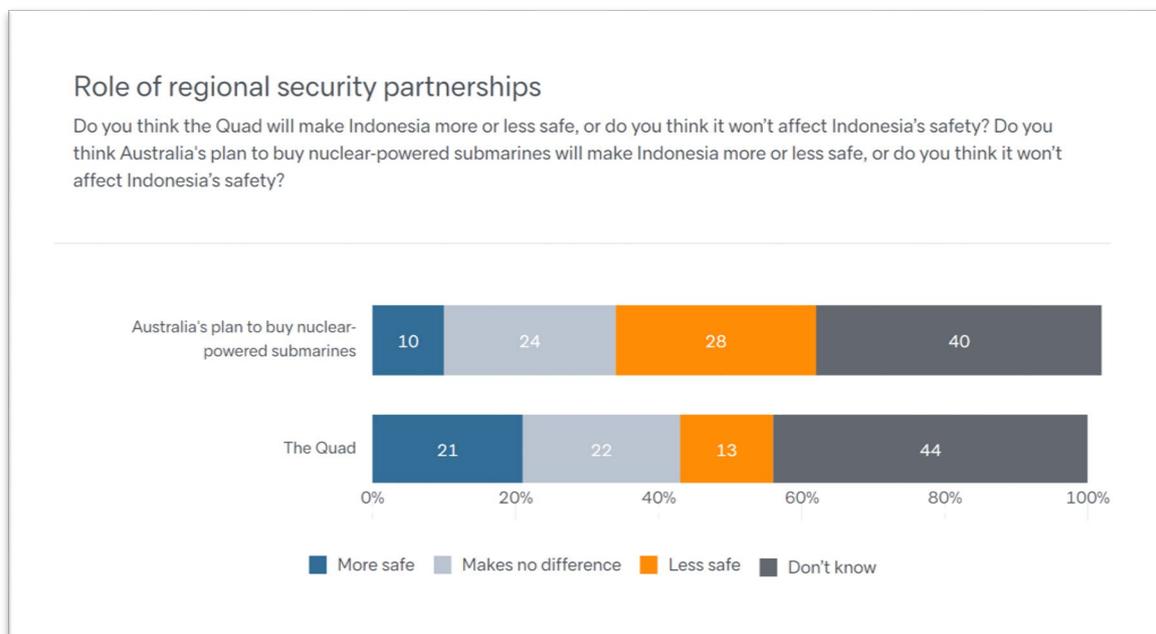
More Indonesians (37%) see Covid-19 as an act of God, while 22% say it comes from human contact with an infected animal. A small fraction of Indonesians (8%) say the pandemic originated domestically in Indonesia. Around one in five (19%) say they do not know the source of the pandemic.



## AUSTRALIA

Very few Indonesians have heard of Australia’s signature foreign policy initiatives in recent years. A mere 7% of Indonesians have heard of the Quadrilateral Security Dialogue (the Quad), the partnership between Australia, the United States, India and Japan. When asked if they would support or oppose Indonesia joining the Quad, the vast majority (66%) say they do not know. Only 21% say the Quad would make Indonesia safer, while 13% think it would make Indonesia less safe. Most say the Quad would make no difference or do not know what effect the Quad would have on Indonesia’s security.

Despite substantial coverage of the Indonesian government’s reaction to the AUKUS agreement, only one in ten Indonesians (11%) have heard of Australia’s plan to buy nuclear-powered submarines under AUKUS. Around a quarter of Indonesians say AUKUS would make Indonesia less safe (28%), and a similar number (24%) say it would make no difference to Indonesia’s security. Only 10% believe AUKUS would make Indonesia safer.



While Indonesians’ trust in Australia has fallen dramatically in the past decade (55% trust, a 20-point drop from 2011, see p. 13), only a third of Indonesians (34%) say Australia poses a threat, and Australia receives a warm reading of 58° on the feelings thermometer (see p. 50).

Compared to 2011, there is also less concern on the questions of Australian foreign policy that have traditionally featured as irritants in the Australia–Indonesia relationship, and there is more positivity towards Australia. Answering on a scale from zero to ten, where zero means ‘strongly disagree’ and ten means ‘strongly agree’, a mean of 6.2 say that ‘Indonesia benefits from having Australia as a stable and prosperous neighbour’, a result of an upward trajectory over the past decade. A similar number (6.1) agree that Australia has shown itself to be a reliable and long-term friend of Indonesia, and there is general agreement with the idea of Australia as an important security and aid partner for Indonesia.

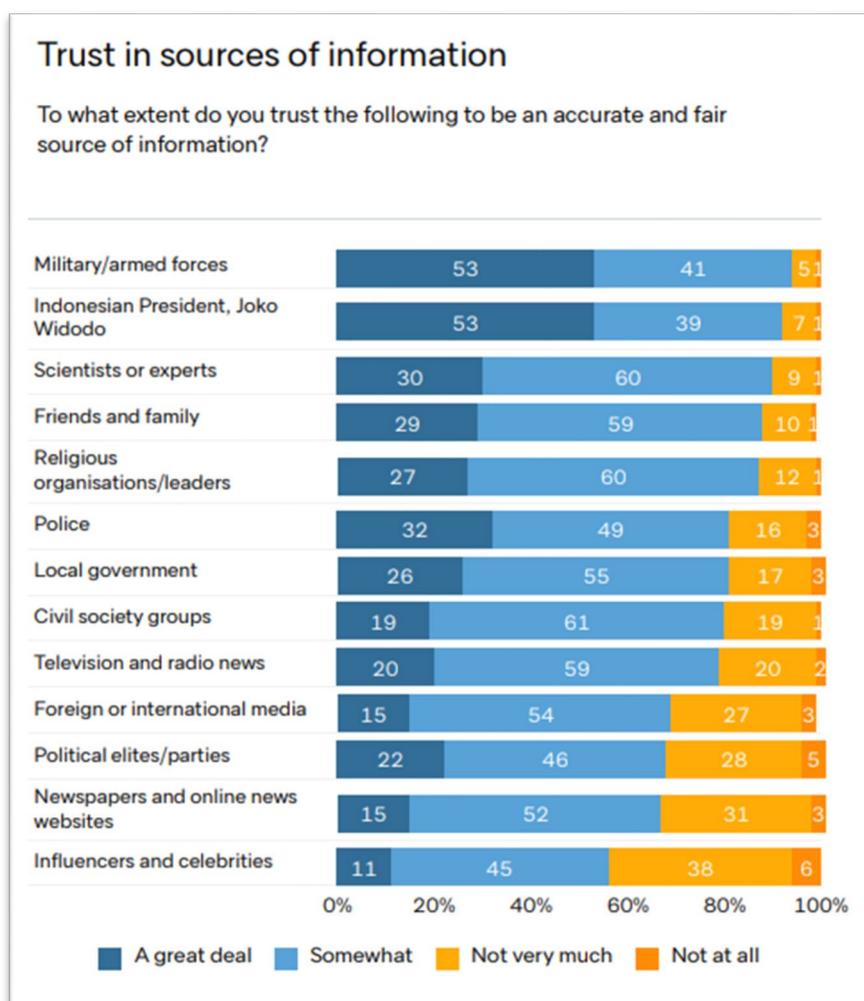
By contrast, concern about Australia’s role in potential separatism is on a downward trajectory. The number that agree that ‘Indonesia is right to worry that Australia is seeking to separate the provinces of Papua and West Papua from Indonesia’ has fallen substantially over the past decade, from a mean of 6.8 in 2006 to 6.0 in 2021.

The same number continues to share the longstanding concern that ‘Australia has a tendency to try to interfere in Indonesia’s affairs too much’. This has increased from 5.5 in 2011 to 6.0, but it remains below the high level of 6.7 in 2006. The belief that ‘Australia’s policy towards Indonesia and the region is shaped too heavily by its alliance with the United States’ has declined from 6.5 in 2011 to 5.9.

## INFORMATION AND MEDIA

Even before Covid-19, Indonesians were flooded with many different sources of information contending for their attention and trust. During the pandemic, information has become more contested, with the president sometimes clashing with his ministers and ministers sometimes at odds with each other. The central government has sometimes been in conflict with provincial governors or city and district leaders. Political parties, the military, the police, the media and civil society groups at times have run their own messaging on Covid-19, sometimes with different emphases.

Most Indonesians say they trust the military (94%) and President Joko (92%) either ‘a great deal’ or ‘somewhat’ to be an accurate and fair source of information. Just over half of Indonesians (53%) say they have ‘a great deal’ of trust in both the military and the President.



There are also high levels of trust in scientists and experts (90%) and friends and family (88%). Religious organisations and leaders, who have vast memberships and many close followers respectively, are trusted by 87% of the population. Eight in ten Indonesians trust the police (81%) to be an accurate and fair source of information.

The same number (81%) express trust in local governments, which have often been on the frontlines of the Covid-19 response. Media organisations are less trusted, with 79% expressing trust in television and radio news, 69% in international media and 67% in local newspapers and websites.

*Seven in ten Indonesians see political parties and elites as trusted sources of information.*

Seven in ten Indonesians (68%) see political parties and elites as trusted sources of information. The least trusted sources are celebrities and online influencers, who are often used as promotional channels by the government and companies keen to tap into their extensive social media following. A bare majority of Indonesians (56%) trust them, with only 11% saying they have a great deal of trust in them as sources of fair and accurate information.

Indonesians are among the world's most active and enthusiastic social media users and, as elsewhere, there is an increasingly heated debate about the impacts this is having on society. Some fear that it is a major factor in exacerbating existing cleavages in society and promoting the spread of falsehoods. Others believe it is more of a positive levelling force, allowing people to communicate, share information and do business more freely and with fewer gatekeepers.

Respondents are divided when asked 'what effect social media has on the way things are going in this country today'. Three in ten say that social media's impact is 'mostly positive', just under one in five say it is 'mostly negative' and just over half say 'neither'.

Nearly eight in ten of those who think social media is a mostly positive influence cite the ease of obtaining news and information as their main reason, while 5% cite the economic and business benefits and 5% cite the ease of social communication.

Of those who think social media is mostly negative, nearly 70% say their main reason is its use for the spread of hoaxes and inaccurate and

unaccountable information, while 5% say it is damaging young people's mentality.

In recent years, the government has increased the pressure on social media giants such as Facebook and Twitter to remove information that it claims is false. Indonesian media organisations and civil society groups also operate various fact-checking initiatives. Three-quarters of respondents (76%) say that they are sometimes or often exposed to political news stories that they believe to be false or made up. Around 28% say they come across these hoax stories often and 48% sometimes, while 6% say hardly ever and 18% never.

## FEELINGS THERMOMETER

Indonesians appear to hold Islamic countries in particularly high regard. Saudi Arabia tops the 'feelings thermometer', which measures Indonesians' perceptions about countries and territories on a scale of 0° (coldest feelings) to 100° (warmest feelings).

Saudi Arabia receives a very warm reading of 70° from Indonesians, as does the United Arab Emirates at 64° and the Palestinian territories\* at 63°.

Japan continues to rank very highly for Indonesians, at 64°. Indonesia's near neighbours and ASEAN partners Singapore and Malaysia both receive warm rankings at 63° and 62° respectively.

Indonesian perceptions of the United Kingdom continue on an upward trajectory, receiving 61°, a seven-degree increase since 2006. Indonesian perceptions of the United States have cooled slightly to 60°, a four-degree decline since 2011, but six degrees above its reading in 2006 (54°).

Indonesian views of Australia have declined slightly over the past decade, falling from 62° in 2011 to 58° in 2021. This remains far warmer than in 2006, when Australia received 51°. This result is very similar to the reading that Australians gave Indonesia in the 2021 Lowy Institute Poll of 55°.

Sentiment towards other regional countries is also on the warmer end of the thermometer, with South Korea receiving a reading of 58° and Philippines 55°.

Warmth towards China has declined since 2011 by five degrees, and the Indonesian reading of the superpower now is a lukewarm 53°. Russia, India and Afghanistan all receive the same score of 53°. For Afghanistan, this marks a substantial nine-degree increase since 2011.

Indonesians have neutral views of their largest neighbours: both Vietnam and Papua New Guinea receive 51° from the Indonesian public, reflecting a significant five-degree increase for Papua New Guinea. Indonesians also give Timor-Leste a neutral reading of 49°, which marks a five-degree

*Warmth towards countries did not necessarily correlate to the most preferred pop cultures, tourism destinations or options for overseas study.*

increase since 2011. Similarly, Myanmar receives 48°, despite the conflict that has dominated the country for the past year.

Israel sits at the bottom of the feelings thermometer for Indonesians, receiving a very cool result of 35°. Nevertheless, this marks a five-degree increase since 2011.

Warmth towards countries did not necessarily correlate to the most preferred pop cultures, tourism destinations or options for overseas study. In terms of culture, South Korea is at the top of the list, with 20% saying that they enjoy South Korean pop culture. The United States (15%) and India (14%) are next ranked, followed by Japanese pop culture (10%).

When considering overseas study, Japan dominates Indonesian responses with 23% saying they would prefer to study in Japan. The United States is Indonesians' second choice at 17%, followed by South Korea at 7%. A number of countries including the United Kingdom, Australia, Malaysia and Singapore are selected by between 4% and 5% of respondents.

Japan (27%) and the United States (15%) are seen as the most attractive destinations to work abroad.

\* Respondents were asked about Palestine (Palestina, in Bahasa Indonesia), as is commonly used in Indonesia, rather than Palestinian territories.

## METHODOLOGY

*Lowy Institute Indonesia Poll 2021 – Charting their own course: How Indonesians see the world* reports the results of a national survey of 3000 Indonesian adults conducted between 29 November and 24 December 2021. The questionnaire was developed by the authors, using the baseline of the Lowy Institute’s 2011 Indonesia Poll. The order of questions in the questionnaire was different from the order presented in this report.

The survey was conducted by Ipsos in Indonesia using a stratified random door-to-door sample with maximum 40 minutes length of interview across 33 provinces (i.e. all provinces of Indonesia excluding Kalimantan Utara). Quotas were set for each province, with broad age group and gender quotas, according to data from the Indonesian Central Agency on Statistics from 2020. Interviewers continued to seek respondents until each quota was filled and applied a Kish Grid where there was the possibility of having more than one member of a household that met the sample criteria. This technique ensures that respondents in the household are selected randomly. Face-to-face surveys continue to be the most reliable means of achieving accurate, nationally representative samples in Indonesia, particularly when there is a question of internet and phone access across a large and dispersed population.

On a simple random sample of 3000 responses, the approximate margin of error is 1.8%, which means there is a 95% chance that responses from the sample fall within a range of 1.8% either side of the notional collective response of the whole population. Since these samples were stratified (by state/territory, age group and gender), the error figure is a guide only. Where the results for a sub-sample are reported, the margin of error is greater. The sampling method employed means that results are generalisable to the national population and sampling errors and confidence intervals can be calculated.

Data quality checks for the survey included checks for ‘speeding’ (completing the survey rapidly when using computer-assisted programming) and ‘straight-lining’ (providing the same answer to every question of a bank of items with the same response options). Pilot interviews were conducted prior to fieldwork commencing and approximately 30% of respondents were called back by telephone to confirm that they had completed the survey as a part of quality control measures. While the sample is nationally representative and clearly aligns with the 2020 Indonesian census data in terms of age, socio-economic status and location, the sample appears to over-represent respondents

that identify with PDI-P as a party and say that they voted for President Joko Widodo in the 2019 presidential election. This may reflect a level of social desirability bias in the respondents.

## ACKNOWLEDGEMENTS

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*The Indonesia Poll 2021 — Charting their own course: How Indonesians see the world* survey and report is supported by the Department of Foreign Affairs and Trade. Responsibility for the views, information and advice expressed in this report are those of the authors and do not necessarily reflect the views of the Lowy Institute or the Australian government.

## TABLES OF RESULTS

Please note that totals may not add to 100% due to rounding. Each response option has been rounded individually and grouped responses (e.g. those who ‘somewhat agree’ plus ‘strongly agree’) have not been rounded at the group level. For more information on the methodology of Indonesia Poll 2021 see p. 52.

### 1) Trust in global powers

How much do you trust the following countries to act responsibly in the world?

	A great deal	Somewhat	Total: a great deal / somewhat	Not very much	Not at all	Total: not very much / not at all	Never heard of	Don't know / refused
Indonesia	50%	34%	<b>84%</b>	9%	2%	<b>11%</b>	2%	4%
Singapore	13%	53%	<b>66%</b>	15%	5%	<b>20%</b>	5%	9%
Japan	17%	48%	<b>65%</b>	16%	5%	<b>21%</b>	5%	9%
United Kingdom	12%	47%	<b>59%</b>	20%	5%	<b>25%</b>	6%	11%
United States	15%	41%	<b>56%</b>	22%	8%	<b>30%</b>	5%	9%
Australia	8%	47%	<b>55%</b>	23%	6%	<b>29%</b>	6%	11%
South Korea	8%	45%	<b>53%</b>	22%	7%	<b>29%</b>	6%	11%
Russia	9%	38%	<b>47%</b>	25%	8%	<b>33%</b>	8%	13%
China	7%	35%	<b>42%</b>	30%	13%	<b>43%</b>	6%	11%
India	4%	37%	<b>41%</b>	32%	9%	<b>41%</b>	7%	12%
Vietnam	3%	36%	<b>39%</b>	31%	9%	<b>40%</b>	8%	13%

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	A great deal			Total: a great deal and somewhat		
	2021	2011	2006	2021	2011	2006
Indonesia	50%	45%	N/A	84%	86%	N/A
Singapore	13%	11%	N/A	66%	69%	N/A
Japan	17%	24%	18%	65%	80%	76%
United Kingdom	12%	N/A	N/A	59%	N/A	N/A
United States	15%	28%	6%	56%	72%	32%
Australia	8%	17%	N/A	55%	75%	N/A
South Korea	8%	N/A	N/A	53%	N/A	N/A
Russia	9%	N/A	N/A	47%	N/A	N/A
China	7%	15%	6%	42%	60%	59%
India	4%	6%	5%	41%	51%	58%
Vietnam	3%	5%	N/A	39%	38%	N/A
Iran	N/A	8%	N/A	N/A	50%	N/A
Malaysia	N/A	4%	N/A	N/A	42%	N/A

## 2. Countries that pose a threat to Indonesia's security

Thinking about possible threats to Indonesia over the next ten years. For each of the following countries please say whether you think it poses a threat or does not pose a threat to the security of Indonesia in the next ten years.

		Poses a threat	Does not pose a threat	Don't know	Refused
China	2021	49%	35%	16%	1%
	2011	39%	53%	8%	1%
United States	2021	43%	40%	16%	1%
	2011	49%	42%	8%	1%
Australia	2021	34%	48%	17%	1%
	2011	31%	59%	10%	1%
Japan	2021	24%	59%	16%	1%
	2011	17%	74%	8%	*
Malaysia	2021	23%	62%	14%	1%
	2011	63%	30%	7%	1%
Vietnam	2021	17%	63%	18%	1%
	2011	11%	73%	16%	1%
India	2021	16%	65%	18%	1%
	2011	N/A	N/A	N/A	N/A
Singapore	2021	15%	70%	15%	1%
	2011	12%	76%	11%	1%
North Korea	2021	N/A	N/A	N/A	N/A
	2011	23%	62%	14%	1%

### 3. Confidence in world leaders

Now I'm going to read a list of political leaders. For each, tell me how much confidence you have in each leader to do the right thing regarding world affairs.

	A lot of confidence	Some confidence	Total: a lot of confidence / some confidence	Not too much confidence	No confidence at all	Total: not too much confidence / no confidence at all	Never heard of	Don't know / refused
Indonesian President Joko Widodo	42%	32%	74%	9%	13%	22%	3%	0%
Saudi Arabian Crown Prince Mohammed bin Salman Al Saud (MBS)	15%	42%	57%	11%	4%	15%	25%	3%
United Arab Emirates Sheikh Mohamed bin Zayed Al Nahyan (MBZ)	13%	39%	52%	13%	4%	17%	28%	3%
Japanese Prime Minister Fumio Kishida	8%	37%	45%	15%	4%	19%	33%	3%
Singaporean Prime Minister Lee Hsien Loong	7%	37%	44%	16%	4%	20%	33%	3%
US President Joe Biden	9%	35%	44%	23%	6%	29%	25%	2%
Russian President Vladimir Putin	9%	31%	40%	19%	5%	24%	32%	3%
Indian Prime Minister Narendra Modi	6%	32%	38%	21%	4%	25%	35%	3%
Australian Prime Minister Scott Morrison	6%	32%	38%	21%	5%	26%	32%	3%
Philippine President Rodrigo Duterte	6%	31%	37%	21%	4%	25%	35%	3%
Chinese President Xi Jinping	7%	27%	34%	23%	9%	32%	31%	4%
North Korean leader Kim Jong-un	7%	27%	34%	23%	10%	33%	30%	4%
Myanmar junta leader Min Aung Hlaing	5%	25%	30%	23%	6%	29%	38%	3%

**4. Feelings of safety**

Thinking about world events, how safe do you feel?

Very Safe	6%
Safe	68%
Unsafe	23%
Very unsafe	3%

**5. Indonesia's direction**

Overall, do you personally think that things in Indonesia are going in the right direction or in the wrong direction?

	2021	2011
Right direction	80%	68%
Wrong direction	11%	24%
Don't know	9%	7%

**6. Threats to Indonesia’s vital interests**

I am now going to read out a list of possible threats to the vital interests of Indonesia in the next ten years. For each one, please select whether you see this as a critical threat, an important but not critical threat, or not an important threat at all.

	Critical threat	An important but not critical threat	Not an important threat at all	Don't know	Refuse to answer
Indonesia being broken up into several different countries	67%	19%	8%	6%	1%
International terrorism	63%	21%	9%	7%	1%
Food shortages	63%	21%	9%	6%	1%
Covid-19 and other potential epidemics	63%	21%	10%	6%	1%
Social religious intolerance (ethnicity/religion/SARA)	61%	21%	11%	6%	1%
Foreign intervention/conspiracy/meddling	61%	21%	10%	8%	1%
A severe downturn in the domestic economy	61%	24%	8%	7%	1%
International financial instability	60%	22%	9%	7%	1%
Internal unrest	60%	23%	10%	7%	1%
Foreign workers coming to Indonesia	59%	23%	12%	6%	1%
The dissemination of false information or fake news (hoaxes, misinformation)	53%	27%	13%	7%	1%
Climate change	52%	27%	13%	7%	1%
The development of China as a world power	47%	26%	16%	10%	1%
Instability in the South China Sea	44%	28%	16%	11%	1%
A military conflict between the US and China	41%	30%	18%	11%	1%

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	2021	2011
Covid-19 and other potential epidemics	73%	N/A
Food shortages	63%	83%
Internal unrest	60%	82%
Indonesia being broken up into several different countries	67%	78%
International terrorism	63%	73%
AIDS, avian flu and other potential epidemics	N/A	63%
International financial instability	60%	61%
Disruption in energy supply	N/A	59%
Climate change <sup>2</sup>	52%	54%
The development of China as a world power	47%	40%
Large numbers of immigrants and refugees coming into Indonesia	N/A	40%

<sup>2</sup> In 2011, the question asked about 'global warming' rather than climate change.

### 7. Interest in foreign affairs

How closely do you follow major events in foreign countries/the world?

Very closely	3%
Somewhat closely	14%
Not too closely	39%
Very little	22%
Not at all	21%

### 8. Indonesia's place in the world

Thinking about Indonesia's place in the world, which of the following do you think Indonesia belongs to?

	Yes, belongs to	No, does not belong to
Southeast Asia	89%	11%
Democratic world	89%	11%
Asia-Pacific	78%	22%
The Islamic world	72%	28%
Indo-Pacific	57%	43%
The Global South	44%	56%
Not part of anywhere	27%	73%

**9. Goals of Indonesian foreign policy**

Thinking about what Indonesian foreign policy should be trying to achieve, I am going to read a list of goals, and ask you to tell me how important each one is for Indonesia. Please say whether you think each issue is very important, fairly important, not very important or not at all important.

	Very important	Fairly important	Total important	Not very important	No at all important	Total not important	Don't know
Protecting the jobs of Indonesian workers	61%	31%	<b>92%</b>	5%	2%	<b>7%</b>	2%
Protecting Indonesian citizens abroad	63%	28%	<b>91%</b>	4%	2%	<b>6%</b>	3%
Strengthening the Indonesian economy	63%	28%	<b>91%</b>	5%	3%	<b>8%</b>	2%
Protecting the health of citizens domestically	62%	29%	<b>91%</b>	4%	2%	<b>6%</b>	3%
Protecting Indonesia's sovereign waters or archipelagic waters	61%	30%	<b>91%</b>	4%	2%	<b>6%</b>	3%
Strengthening Indonesia's trade relations	52%	38%	<b>90%</b>	5%	3%	<b>8%</b>	3%
Promoting Indonesian businesses overseas	52%	37%	<b>89%</b>	6%	3%	<b>9%</b>	3%
Strengthening ASEAN, or the Association of Southeast Asian Nations	49%	40%	<b>89%</b>	5%	3%	<b>8%</b>	3%
Strengthening the United Nations	48%	41%	<b>89%</b>	6%	3%	<b>9%</b>	3%

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Combating international terrorism	52%	35%	<b>87%</b>	8%	3%	<b>11%</b>	3%
Tackling climate change	44%	43%	<b>87%</b>	8%	2%	<b>10%</b>	3%
Promoting peace and conflict resolution	43%	43%	<b>86%</b>	7%	3%	<b>10%</b>	4%
Helping to prevent the spread of nuclear weapons	46%	38%	<b>84%</b>	9%	4%	<b>13%</b>	4%
Promoting democracy in other countries	36%	42%	<b>78%</b>	14%	4%	<b>18%</b>	4%
Advocating for Muslim communities in other countries	35%	43%	<b>78%</b>	13%	4%	<b>17%</b>	5%
Promoting gender equality internationally	34%	42%	<b>76%</b>	15%	5%	<b>20%</b>	4%
Building close relations with the United States	28%	48%	<b>76%</b>	16%	4%	<b>20%</b>	4%
Building close relations with Australia	27%	45%	<b>72%</b>	19%	5%	<b>24%</b>	4%
Building close relations with China	22%	42%	<b>64%</b>	22%	9%	<b>31%</b>	5%

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<i>Ranked by % very important and fairly important</i>	<b>2021</b>	<b>2011</b>
Protecting the jobs of Indonesian workers	92%	98%
Protecting Indonesian citizens abroad	91%	97%
Strengthening the Indonesian economy	91%	96%
Protecting the health of citizens domestically	91%	N/A
Protecting Indonesia's sovereign waters or archipelagic waters	91%	N/A
Strengthening Indonesia's trade relations	90%	N/A
Promoting Indonesian businesses overseas	89%	93%
Strengthening ASEAN, or the Association of Southeast Asian Nations	89%	89%
Strengthening the United Nations	89%	88%
Combating international terrorism	87%	89%
Tackling climate change	87%	81%
Promoting peace and conflict resolution	86%	N/A
Helping to prevent the spread of nuclear weapons	84%	77%
Promoting democracy in other countries	78%	66%
Advocating for Muslim communities in other countries	78%	N/A
Promoting gender equality internationally	76%	N/A
Building close relations with the United States	76%	78%
Building close relations with Australia	72%	80%
Building close relations with China	64%	70%

**10. Priorities for peace and conflict resolution**

You said that Indonesia promoting peace and conflict resolution is a [very] or [fairly] important foreign policy goal. How important do you think the following issues are as priorities for Indonesia? [n=2580]

	Very important	Fairly important	Total important	Not very important	Not at all important	Total not important
Deploying Indonesian peacekeepers to other countries	36%	51%	87%	11%	2%	13%
Playing a larger role in the Islamic world	38%	44%	82%	15%	3%	18%
Providing foreign aid to developing countries	26%	54%	80%	18%	3%	21%
Creating an independent Palestinian state	34%	45%	79%	17%	4%	21%
Pushing ASEAN to manage the South China Sea dispute	29%	47%	76%	19%	4%	23%
Addressing the Rohingya issue	25%	48%	73%	22%	5%	27%
Supporting an inclusive government in Afghanistan	21%	48%	69%	26%	5%	31%
Protecting Uyghur communities in China	22%	44%	66%	28%	6%	34%
Playing a leadership role in resolving the Myanmar crisis	19%	47%	66%	29%	5%	34%
Helping to mediate US–China competition	19%	43%	62%	31%	8%	39%
Supporting democratic movement in Hong Kong	18%	44%	62%	32%	6%	38%

**11. Heard of Indonesia’s ‘active and independent’ policy**

Now a question about Indonesia’s foreign policy principle of *‘bebas dan aktif’*. Before today, had you heard of *‘bebas dan aktif’* policy?

No	74%
Yes	26%

**12. Understanding of ‘active and independent’ policy**

[If heard of] And would you say you have...? [n=775]

A good understanding of what <i>‘bebas dan aktif’</i> is about	45%
A vague idea of what it’s about	42%
No idea at all	13%

**13. Support for ‘active and independent’ policy**

[If good understanding/vague idea] And do you think Indonesia should or should not maintain its policy of *‘bebas dan aktif’*? [n=673]

Yes, should	90%
No, shouldn’t	10%

**14. Indonesia’s approach to foreign policy**

Which of the following diplomatic approaches should shape Indonesia’s foreign policy?

Being firm but polite, even if it causes some friction with other countries	46%
Engaging with other countries in a patient way, seeking consensus through consultation	34%
Defending Indonesia’s interests at all costs, even if it involves confrontation with other countries	20%

### 15. Important international organisations to Indonesia

Thinking about which international organisations are most important to Indonesia, please say which one of the following international organisations you personally think is the most important and second-most important to Indonesia.

	Most important		Second-most important	
	2021	2011	2021	2011
United Nations, or UN	41%	34%	69%	63%
The Association of Southeast Asian Nations, or ASEAN	30%	40%	57%	69%
Don't know	12%	12%	16%	N/A
Organisation of Islamic Cooperation	5%	1%	14%	5%
Asia-Pacific Economic Cooperation, or APEC	4%	7%	18%	19%
Non-Aligned Movement	3%	3%	12%	10%
G20	3%	4%	9%	4%
No one	3%	1%	5%	N/A
Refused	1%	1%	1%	N/A

### 16. Optimism about ASEAN

How optimistic do you feel about ASEAN's role in the future?

Very optimistic	17%
Optimistic	64%
<b>Total: very optimistic and optimistic</b>	<b>81%</b>
Pessimistic	6%
Very pessimistic	3%
<b>Total: pessimistic and very pessimistic</b>	<b>9%</b>
Don't know	10%

**17. Indonesia and minilaterals**

Would you support or oppose Indonesia forming partnerships/minilaterals with other middle powers and neighbours depending on different issues and interests?

Support	35%
Oppose	13%
Don't know	52%

**18. Partner countries for Indonesia**

If you would support this [forming partnerships/minilaterals], which countries would you support Indonesia partnering with? [respondents volunteer responses; n=1046]

Japan	46%
Singapore	14%
Australia	13%
Malaysia	10%
South Korea	8%
China	5%
India	1%
Thailand	1%

**19. Confidence in Indonesian institutions**

How much confidence, if any, do you have in each of the following institutions to defend Indonesia’s strategic interests?

	Indonesian military (Tentara Nasional Indonesia)	Indonesian maritime security agency (Badan Keamanan Laut Indonesia)	Indonesian intelligence agencies	Indonesia’s foreign ministry (Kementerian Luar Negeri)	Indonesian police (Polisi Republik Indonesia)
A lot of confidence	70%	54%	54%	47%	46%
Some confidence	27%	40%	38%	44%	37%
<b>Total: a lot of confidence / some confidence</b>	<b>97%</b>	<b>94%</b>	<b>92%</b>	<b>91%</b>	<b>83%</b>
Not too much confidence	3%	6%	7%	8%	14%
No confidence at all	0%	1%	1%	1%	3%

**20. Confidence in Indonesian military**

And how much confidence do you have in the capability of Tentara Nasional Indonesia [Indonesia’s military] to defend Indonesia from external threats?

A lot of confidence	62%
Some confidence	34%
<b>Total: a lot of confidence / some confidence</b>	<b>96%</b>
Not too much confidence	3%
No confidence at all	1%

**21. Attitudes towards China**

Please say whether you strongly agree, agree, disagree or strongly disagree with the following statements:

	Indonesia should join with other countries to limit China's influence	Indonesia is doing enough to pressure China to improve human rights	China's aim is to dominate Asia	China's growth has been good for Indonesia	Indonesia's interests would not be harmed if China gained more power and influence	The United States should give China a larger say in regional affairs
Strongly agree	16%	11%	11%	8%	8%	6%
Agree	44%	44%	37%	35%	32%	34%
<b>Total agree</b>	<b>60%</b>	<b>55%</b>	<b>48%</b>	<b>43%</b>	<b>40%</b>	<b>40%</b>
Disagree	21%	24%	30%	34%	35%	32%
Strongly disagree	5%	6%	7%	9%	10%	8%
<b>Total disagree</b>	<b>26%</b>	<b>30%</b>	<b>37%</b>	<b>43%</b>	<b>45%</b>	<b>40%</b>

	Indonesia should join with other countries to limit China's influence	Indonesia is doing enough to pressure China to improve human rights	China's aim is to dominate Asia	China's growth has been good for Indonesia	The United States should give China a larger say in regional affairs	Indonesia's interests would not be harmed if China gained more power and influence
2021	60%	55%	48%	43%	40%	40%
2011	50%	49%	45%	54%	41%	36%

**22. Leading military power in Asia**

Now please think about which country will be the leading military power in Asia in 20 years. Do you personally think China or the United States will be the leading military power in Asia in 20 years' time, or will it be another country?

	2021	2011
United States	36%	58%
China	22%	25%
Indonesia	2%	1%
Japan	1%	1%
Don't know	36%	11%

**23. Potential military conflict between China and the United States**

In the event of a military conflict between China and the United States, please say which one of the following statements comes closest to your own personal view.

Indonesia should remain neutral	84%
Indonesia should support the United States	4%
Indonesia should support China	1%
Don't know	10%

**24. Leading economic power in Asia**

And what about the leading economic power in Asia in 20 years. Do you personally think China or the United States will be the leading economic power in Asia in 20 years' time, or will it be another country?

	2021	2011
China	31%	52%
United States	25%	23%
Another country	4%	1%
Don't know	36%	13%
Refused	1%	1%

**25. China's influence in Indonesia**

Are you concerned or not concerned about China's influence in Indonesia?

Yes, concerned	33%
No, not concerned	67%

**26. US influence in Indonesia**

Are you concerned or not concerned about the United States' influence in Indonesia?

Yes, concerned	19%
No, not concerned	81%

**27. Attitudes to democracy**

I am now going to read you three statements about democracy. Please say which one of the three statements comes closest to your own personal views about democracy.

	2021	2011
Democracy is preferable to any other kind of government	60%	62%
In some circumstances, a non-democratic government can be preferable	20%	16%
For someone like me, it doesn't matter what kind of government we have	18%	16%

**28. Economic optimism**

Overall, how optimistic are you about Indonesia's economic performance over the next five years?

	2021	2011
Very optimistic	12%	16%
Optimistic	71%	63%
<b>Total optimistic</b>	<b>83%</b>	<b>79%</b>
Pessimistic	10%	14%
Very pessimistic	2%	1%
<b>Total pessimistic</b>	<b>12%</b>	<b>15%</b>
Don't know	5%	5%

**29. Globalisation**

Do you believe that globalisation, especially the increasing connections of our economy with others around the world, is mostly good or mostly bad for Indonesia?

	2021	2011	2006
Mostly good	62%	67%	61%
Mostly bad	7%	26%	31%
Don't know	31%	7%	8%

### 30. Important economies for Indonesia

Thinking about the economies of [the following countries], which one do you think is the most important and second-most important to Indonesia at the moment?

	Most important	Second-most important
United States	18%	19%
Southeast Asia/ASEAN	18%	16%
Japan	15%	21%
China	12%	13%
Australia	7%	11%
European Union	5%	9%
Don't know	20%	8%
Refused	2%	1%

### 31. Model for Indonesia's economic development

In your opinion, which one of these countries, if any, do you think should be a model for Indonesia's future economic development?

Japan	26%
United States	20%
China	13%
Singapore	12%
We should follow our country's own model	9%
Malaysia	3%
Australia	3%
Other	2%
India	1%
Can't choose	9%

### 32. Levels of foreign investment

Do you think the Indonesian government is currently allowing too much, too little or the right amount of investment from foreign countries?

Allowing too much	31%
Allowing the right amount	26%
Allowing too little	17%
Not sure	26%

### 33. Country-specific foreign investment

You said the Indonesian government is currently allowing too much investment from foreign countries. From which particular countries do you think the Indonesian government is allowing too much investment? [respondents volunteer responses, n=934]

China	58%
United States	13%
Australia	3%
Japan	3%
Singapore	2%
United Arab Emirates	2%

### 34. Foreign investment

Are you in favour or opposed to a company, bank or investment fund from the following country buying a controlling stake in a major Indonesian company?

	Strongly in favour	In favour	Total in favour	Opposed	Strongly opposed	Total opposed	Don't know	Refused
Saudi Arabia	15%	42%	57%	23%	8%	31%	12%	1%
Singapore	8%	46%	54%	25%	9%	34%	12%	1%
Japan	11%	42%	53%	26%	9%	35%	11%	1%
Malaysia	6%	41%	47%	31%	11%	42%	12%	11%
United States	7%	35%	42%	34%	12%	46%	12%	1%
Australia	6%	35%	41%	34%	11%	45%	13%	13%
Netherlands	4%	33%	37%	35%	13%	48%	15%	1%
China	4%	26%	30%	38%	18%	56%	13%	1%

### 35. Attitudes to foreign aid

Do you think that international development assistance has been mostly good or mostly bad for Indonesia?

Very good	20%
Mostly good	67%
<b>Total: very good and mostly good</b>	<b>87%</b>
Mostly bad	11%
Very bad	3%
<b>Total: mostly bad and very bad</b>	<b>14%</b>

**36. Attitudes to donors**

Now please think about the aid or international development assistance that Indonesia receives from foreign countries. Just based on what you know, which country do you think currently provides the most aid to Indonesia at the moment? [respondents volunteer responses]

	The most foreign aid		The second most foreign aid	
	2021	2011	2021	2011
United States	24%	33%	19%	47%
China	16%	5%	10%	15%
Saudi Arabia	12%	6%	13%	13%
Japan	11%	24%	17%	41%
Australia	7%	14%	12%	31%
Singapore	2%	2%	8%	6%
Germany	1%	2%	2%	8%
The Netherlands	1%	1%	2%	3%
Malaysia	1%	N/A	3%	N/A
Don't know	24%	7%	8%	N/A

**37. Attitudes to global warming**

Now about global warming. There is a controversy over what the countries of the world should do about the problem of global warming. I'm going to read you three statements. Please tell me which statement comes closest to your own point of view.

	2011	2021
The problem of global warming should be addressed, but its effects will be gradual, so we can deal with the problem gradually by taking steps that are low in cost	48%	38%
Global warming is a serious and pressing problem. We should begin taking steps now even if this involves significant costs	31%	36%
Until we are sure that global warming is really a problem, we should not take any steps that would have economic costs	13%	26%

### 38. National approaches to climate change

For each of these countries, do you think they have done too much, too little or about the right amount in their effort to combat climate change?

	Too little	Too much	Right amount
India	56%	15%	29%
China	48%	19%	33%
Australia	46%	18%	37%
Japan	40%	22%	38%
Indonesia	39%	24%	37%
United States	39%	25%	37%

### 39. National approaches to Covid-19 pandemic

Overall, how well or badly do you think each of the following countries has handled the Covid-19 coronavirus outbreak so far?

	Very well	Fairly well	Total well	Fairly badly	Very badly	Total badly	Don't know
Indonesia	32%	51%	83%	10%	4%	14%	3%
Singapore	25%	57%	82%	7%	3%	10%	7%
Australia	21%	58%	79%	10%	3%	13%	8%
United Kingdom	23%	56%	79%	10%	3%	13%	8%
Malaysia	20%	59%	79%	11%	4%	15%	7%
United States	24%	53%	77%	12%	4%	16%	7%
China	20%	49%	69%	14%	8%	22%	9%
India	12%	42%	54%	26%	12%	38%	9%

### 40. Origin of the pandemic

From what you have seen or heard, which of the following do you think is the most likely cause of the Covid-19 pandemic?

An act of God	37%
Human contact with an infected animal	22%
A laboratory leak in a foreign country <sup>3</sup>	12%
A domestic problem or issue	8%
Don't know	19%

<sup>3</sup> When asked to volunteer in which country the leak occurred, 11.6% say China, and 0.2% say the United States.

**41. Attitudes towards Australia**

I am now going to read out a number of statements about Australia and Indonesia. Please say how much you agree or disagree with each one using a scale of zero to ten, where zero means you strongly disagree and ten means you strongly agree.

	Indonesia benefits from having Australia as a stable and prosperous neighbour	Australia has shown itself to be a reliable long-term friend of Indonesia	Indonesia is right to worry that Australia is seeking to separate the provinces of Papua and West Papua from Indonesia	Australia has been an important aid partner for Indonesia	Australia has been an important security partner for Indonesia	Australia has a tendency to try to interfere in Indonesia's affairs too much	Australia's policy towards Indonesia and the region is shaped too heavily by its alliance with the United States
<b>2021</b>	6.2	6.1	6.1	6.0	6.0	6.0	5.9
<b>2011</b>	5.8	6.2	6.3	6.3	N/A	5.5	6.5
<b>2006</b>	5.3	5.3	6.8	N/A	N/A	6.7	6.6

**42. Knowledge of the Quad**

Have you heard about the partnership between Japan, Australia, the United States and India called the Quadrilateral Security Dialogue?

No, I haven't heard of	93%
Yes, I have heard of	7%

**43. Joining the Quad**

Would you support or oppose Indonesia joining the Quad?

Support	22%
Oppose	11%
Don't know	66%

**44. Role of the Quad**

Do you think the Quad will make Indonesia more or less safe, or do you think it won't affect Indonesia's safety?

No effect	22%
Safer	21%
Less safe	13%
Don't know	44%

**45. Knowledge of AUKUS**

Have you heard about Australia's plan to buy nuclear-powered submarines under the AUKUS deal with the United States and United Kingdom?

No, I haven't heard of	89%
Yes, I have heard of	11%

**46. Role of AUKUS**

Do you think that Australia's plan to buy nuclear-powered submarines will make Indonesia more or less safe, or do you think it won't affect Indonesia's safety?

Less safe	28%
No effect	24%
Safer	10%
Don't know	40%

**47. Trust in sources of information**

To what extent do you trust the following to be an accurate and fair source of information?

	A great deal	Somewhat	Total trust	Not very much	Not at all	Total don't trust
Military/armed forces	53%	41%	<b>94%</b>	5%	1%	<b>6%</b>
Indonesian President Joko Widodo	53%	39%	<b>92%</b>	7%	1%	<b>8%</b>
Scientists or experts	30%	60%	<b>90%</b>	9%	1%	<b>10%</b>
Friends and family	29%	59%	<b>88%</b>	10%	1%	<b>11%</b>
Religious organisations/leaders	27%	60%	<b>87%</b>	12%	1%	<b>13%</b>
Police	32%	49%	<b>81%</b>	16%	3%	<b>19%</b>
Local government	26%	55%	<b>81%</b>	17%	3%	<b>20%</b>
Civil society groups	19%	61%	<b>80%</b>	19%	1%	<b>20%</b>
Television and radio news	20%	59%	<b>79%</b>	20%	2%	<b>22%</b>
Foreign or international media	15%	54%	<b>69%</b>	27%	3%	<b>30%</b>
Political elites/parties	22%	46%	<b>68%</b>	28%	5%	<b>33%</b>
Newspapers and online news websites	15%	52%	<b>67%</b>	31%	3%	<b>34%</b>
Influencers and celebrities	11%	45%	<b>56%</b>	38%	6%	<b>44%</b>

**48. Effect of social media**

Overall, what effect would you say social media has on the way things are going in this country today?

Mostly positive effect	30%
Mostly negative effect	18%
Neither	52%

**49. Experience of fake news**

And how about political news stories online that you think are made up/hoaxes? Do you come across those often, sometimes, hardly ever or never?

Often	28%
Sometimes	48%
Hardly ever	6%
Never	18%

50. Which foreign pop cultures (music, film, celebrities, television) do you most enjoy? [respondents volunteer responses]

South Korea	20%
United States	15%
India	14%
Japan	10%
Malaysia	5%
United Kingdom	5%
China	2%
Australia	1%
Indonesia	1%
Don't know	26%

51. If given the opportunity, which country would be your first choice if you (or your family member) were to study overseas? [respondents volunteer responses]

Japan	23%
United States	17%
South Korea	7%
Malaysia	5%
Singapore	5%
United Kingdom	5%
Australia	4%
China	3%
India	2%
Germany	2%
France	1%
Netherlands	1%
Don't want to study overseas/don't know	22%

52. If you were to go overseas, which countries would you find most attractive to work in? [respondents volunteer responses]

Japan	27%
United States	15%
South Korea	7%
Singapore	6%
Malaysia	5%
Australia	4%
United Kingdom	3%
China	2%
Germany	2%
India	1%
Taiwan	1%
France	1%
Netherlands	1%
Don't want to work overseas/don't know	22%

53. Have you ever visited a country outside Indonesia?

Yes	3%
No	94%
Don't know	3%
Refused	1%

54. [if yes] Have you ever visited Australia? [n=97]

Yes	6%
No	94%

### 55. Feelings thermometer

Please rate your feelings towards some countries, with one hundred (100) meaning a very warm, favourable feeling, zero (0) meaning a very cold, unfavourable feeling, and fifty (50) meaning not particularly warm or cold. You can use any number from zero to one hundred, the higher the number the more favourable your feelings are towards that country. If you have no opinion or have never heard of that country, please say so.

	2021	2011	2006
Saudi Arabia	70	N/A	N/A
Japan	64	66	64
United Arab Emirates	64	N/A	N/A
Singapore	63	64	59
Palestine	63	N/A	N/A
Malaysia	62	53	66
United Kingdom	61	59	54
United States	60	64	54
Australia	58	62	51
South Korea	58	60	51
Philippines	55	N/A	N/A
China	53	58	58
Russia	53	N/A	N/A
India	53	55	56
Afghanistan	53	44	N/A
Vietnam	51	49	N/A
Papua New Guinea	51	46	45
Timor-Leste	49	44	43
Myanmar	48	N/A	N/A
Israel	35	30	39

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