



Asia-Pacific
Economic Cooperation

Multilateralism in the Era of COVID-19

Perception Survey – Post-2020 APEC

Partners:



The Asia Foundation



Edelman

ABOUT THE REPORT

Since 1994, APEC operated under the overarching principle of achieving free and open trade and investment in the Asia-Pacific no later than the year 2020, goals leaders set in 1994 when they met in Bogor, Indonesia. A lot has changed since then.

In 2020, the APEC forum assessed economies' progress under the Bogor Goals, while coping with the devastating impact of the global COVID-19 pandemic. Such a pivotal year was an opportune moment to formulate new way forward. In November 2020, Leaders reached consensus on the APEC Putrajaya Vision, for an “open, dynamic, resilient and peaceful Asia-Pacific community by 2040, for the prosperity of all our people and future generations,” which will be achieved through the pursuit of the following economic drivers:



Trade and Investment



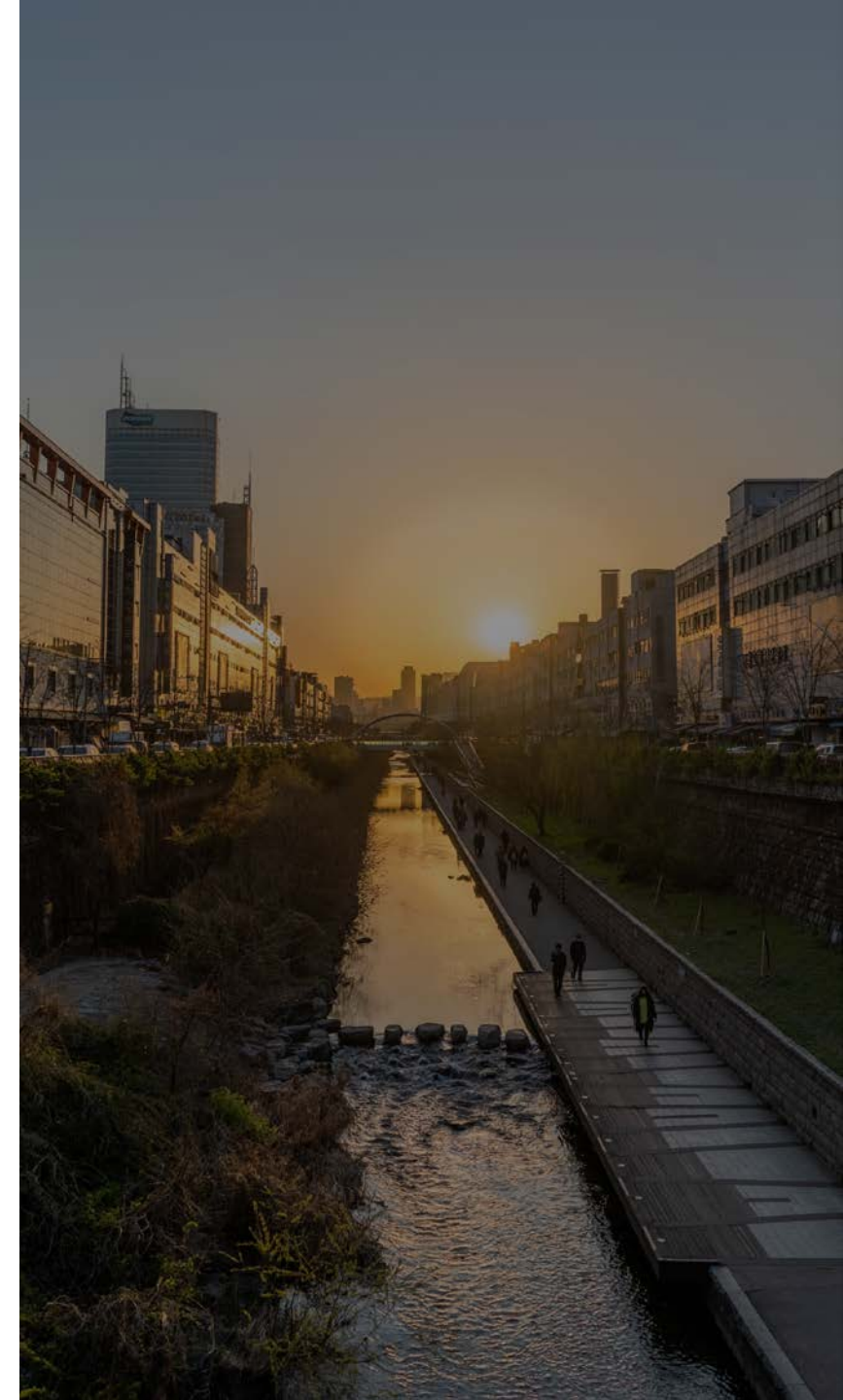
Innovation and Digitalization



Strong, Balanced, Secure, Sustainable and Inclusive Growth

The APEC Secretariat, through a partnership with The Asia Foundation and Edelman, fielded an online survey of more than 7,000 respondents throughout the Asia-Pacific to gain a more thorough understanding of public and stakeholder perceptions of APEC's role within the context of the events of 2020 as well as the challenges and opportunities posed by public information in the digital age—at a time when digital platforms have become increasingly prevalent in daily life due to lockdowns.

APEC's expanded goals, as well as the milieu-changing social and economic effects of the ongoing pandemic, presents an opportunity to amplify its responsiveness to the needs of people in the region and ensure it remains relevant in the coming decades. This will allow the forum to reassess how it communicates and reconsider how it wants to be perceived by its stakeholders and members of the public.



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1

METHODOLOGY

Online survey amongst the general public:

Varied by age,
gender, region,
education, and
income

7,600+
respondents in
total (400 per
market)*

Fieldwork was
conducted
December 11 to
31, 2020

Data margin of
error: +/-5%

*Note: The survey was also distributed to members of the public in Brunei Darussalam and Papua New Guinea via the APEC Secretariat. While the data obtained was consolidated into the overall results, economy-specific breakdowns are unavailable due to the small sample sizes in those two economies.



2

RESEARCH OBJECTIVES

1

Help APEC policymakers formulate and communicate a post-2020 agenda

2

Provide supporting data to be used in developing themes, priorities and messages that will resonate with APEC stakeholders during the COVID era and beyond

3

Understand specific challenges and opportunities for messaging on key APEC issues for the region

3

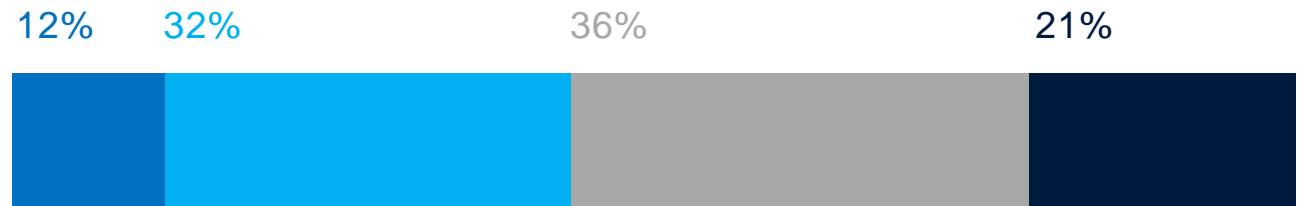
DETAILED FINDING: VIEWS TOWARDS MULTILATERALISM

A close-up photograph of two hands wearing white latex gloves, shaking hands in a firm grip. The background is dark, making the white gloves stand out. The text is overlaid on the center of the image.

THERE IS STRONG SUPPORT FOR INTERNATIONAL
COOPERATION TO TACKLE CURRENT
AND FUTURE GLOBAL CRISES

There is a limited understanding of the term multilateralism among the public in APEC economies.

Understanding of multilateralism



Very well



Somewhat well



A little



Never heard of it

Question: How well do you understand the term “multilateralism”? Question asked of all respondents. Percentages may not add up to 100% due to rounding.



However, the vast majority of the public believes it is important for economies to cooperate to solve global and regional challenges, even at the expense of domestic interests.

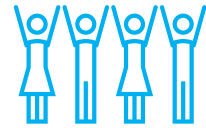
Preference for multilateral cooperation



Question: Below are some statements describing international relations. Within each set of statements, which of them come closest to your view? Question asked of all respondents. APEC Average. Percentages may not add up to 100% due to rounding.

Many see international cooperation as the only solution for future economic success.

Way to achieve economic success



71%

Thinks **multilateralism** is the **only way** for success



29%

Thinks an **economy** can succeed by itself

Question: Below are some statements describing international relations. Within each set of statements, which of them come closest to your view? Question asked of all respondents. APEC Average. Percentages may not add up to 100% due to rounding.

Closer economic integration among economies is the most effective win-win strategy in a global crisis.

Solution to global crisis



70%

Prefers **closer economic integration**



30%

Prefers **more self-reliance**

Question: Below are some statements describing international relations. Within each set of statements, which of them come closest to your view? Question asked of all respondents. APEC Average. Percentages may not add up to 100% due to rounding.

The public also acknowledges multilateralism as the only way to fight the COVID-19 pandemic.

Elimination of COVID-19



73%

Thinks **cooperation** can eliminate **COVID-19**



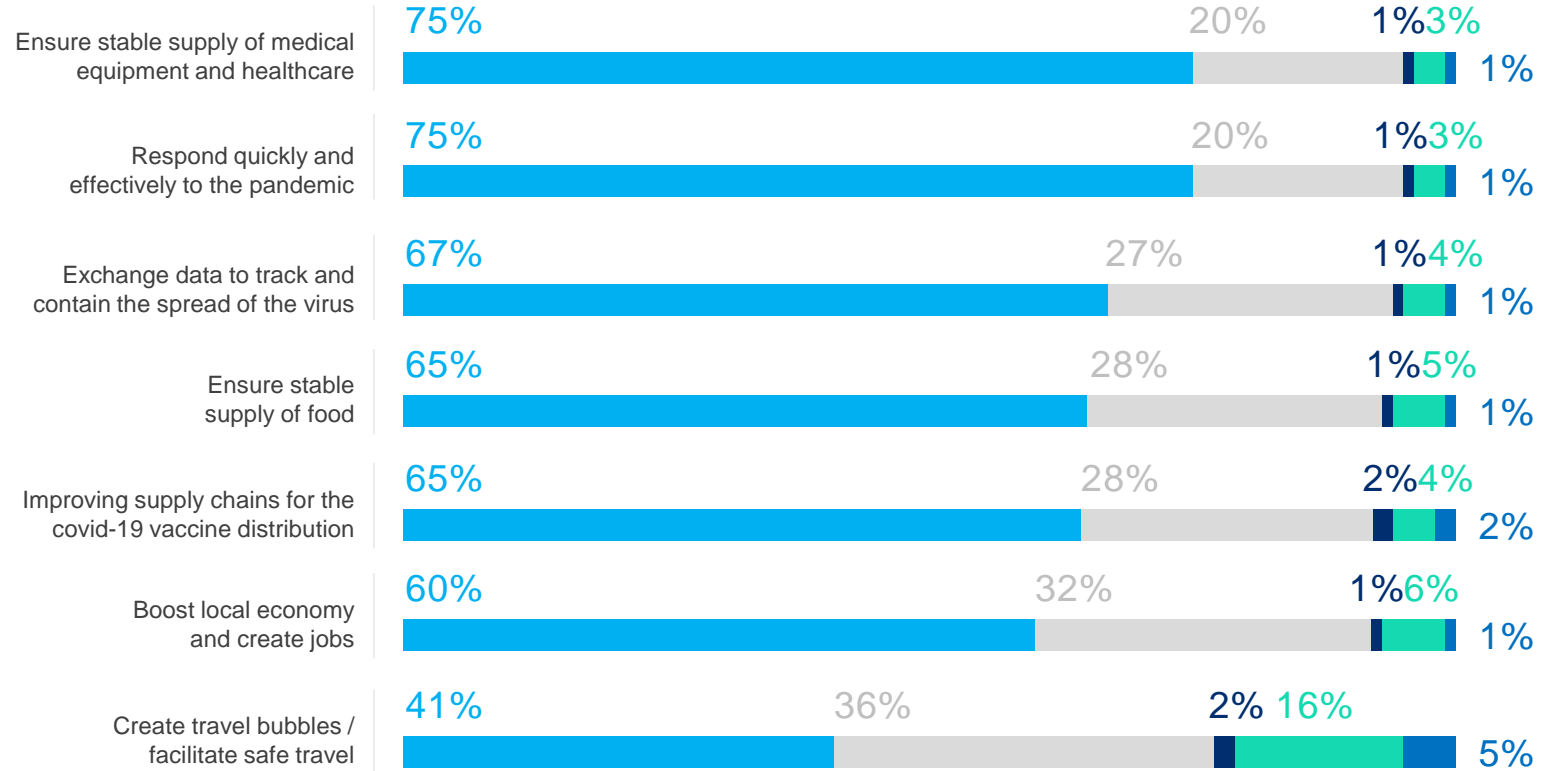
27%

Thinks **economies** can eliminate **COVID-19 alone**

Question: Below are some statements related to the control and prevention of COVID-19. Within each set of statements, which of them come closest to your view? Question asked of all respondents. APEC Average. Percentages may not add up to 100% due to rounding.

Cooperation between economies plays a critical role in overcoming a crisis such as the COVID-19 pandemic.

Importance of cooperation in tackling COVID-19



Very Important



Somewhat important



Don't know



Not so important



Not important at all

Question: Thinking of the recent COVID-19 pandemic, please indicate how important you think it is for [RESPONDENT'S RESIDING MARKET] to work with other economies in each of the following areas? Question asked of all respondents. APEC Average. Percentages may not add up to 100% due to rounding.

KEY FINDINGS

1

There is limited understanding of the term multilateralism amongst the majority of those surveyed. Economies with lower understanding of the term are less likely to see its benefits.

2

Most of the public in APEC believes in the importance of economies working together to solve global and regional challenges and sees the benefits of multilateralism as part of an effort to achieve future economic success.

3

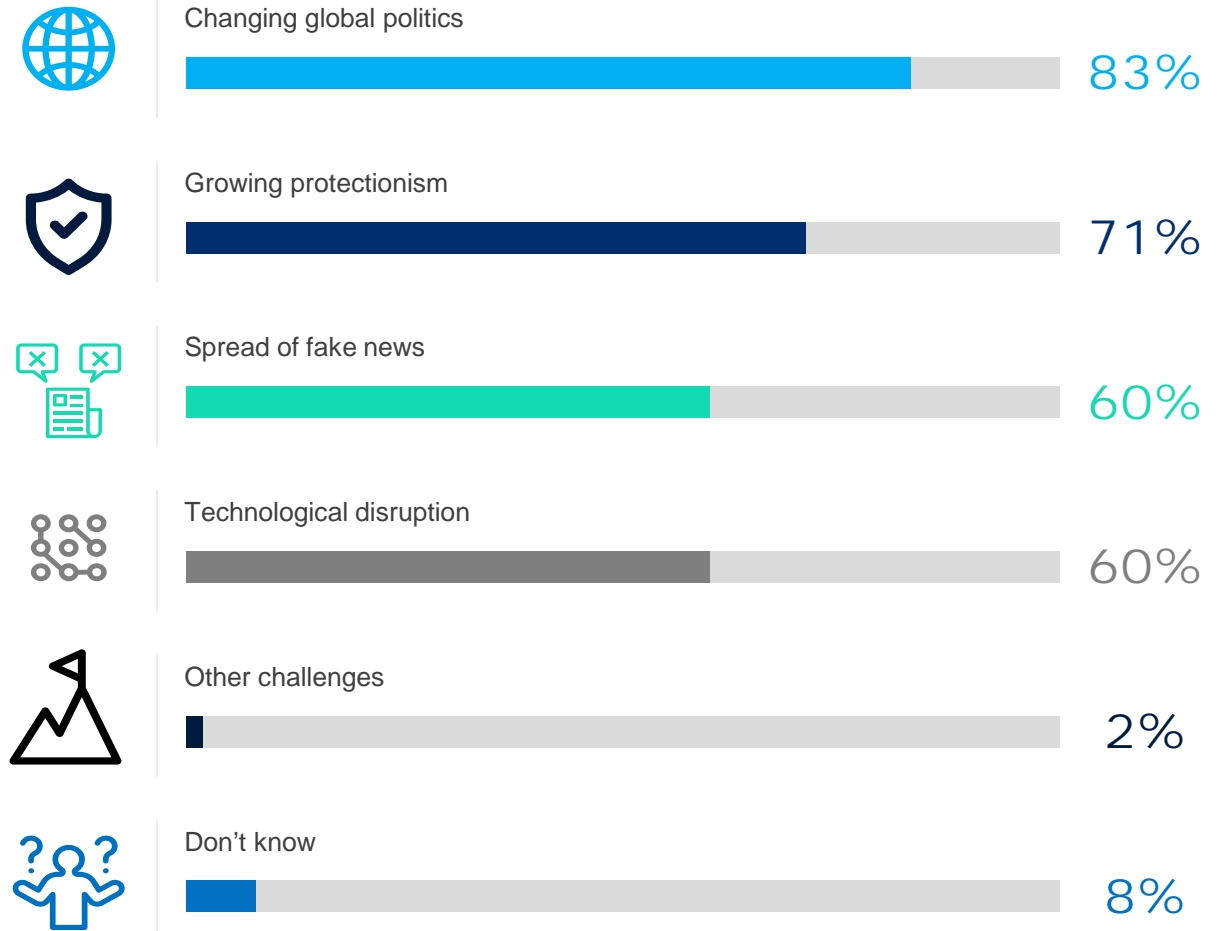
A vast majority acknowledges that multilateralism can help overcome global crises and is the only way to fight the current pandemic. Many expect to see more international cooperation in the future.

An aerial photograph of a city skyline at dusk. The sky is filled with soft, colorful clouds in shades of orange, pink, and blue. In the foreground, a large, dark, cylindrical building with a textured facade stands prominently. To the right, a wide river flows through the city, with several boats visible on its surface. In the background, a dense cluster of skyscrapers is visible, including a very tall, thin tower that stands out against the sky. The overall scene is a mix of urban development and natural elements like the river and sky.

THOUGH ECONOMIC BENEFITS BROUGHT ABOUT BY
MULTILATERALISM ARE VALUED, THE PUBLIC HAS
SOME CONCERNS AND RESERVATIONS

Changing global politics and growing protectionism are considered to be the key challenges to multilateralism post-COVID.

Future challenges to multilateralism



Question: What do you think will be the key challenges to multilateralism in the post-COVID future? APEC Average. Question asked of all respondents.

A significant proportion of the public are doubtful that export-oriented development is the best solution for their markets' success.

View towards international trade



65%

Prefers **export-oriented development**



35%

Prefers **relying on domestic development**

Question: Below are some statements describing international relations. Within each set of statements, which of them come closest to your view? Question asked of all respondents. APEC Average. Percentages may not add up to 100% due to rounding.

While many see the benefits of international cooperation, some question the fairness of the system.

Impact of multilateral cooperation



64%

Thinks multilateralism **benefits all**



36%

Thinks multilateralism is **unfair**

Question: Below are some statements describing international relations. Within each set of statements, which of them come closest to your view? Question asked of all respondents. APEC Average. Percentages may not add up to 100% due to rounding.

KEY FINDINGS

1

The majority of the public says that changing global politics and growing protectionism will be the key challenges to multilateralism in the post-COVID future. A considerable proportion of the public are pessimistic about the future.

2

While many see the benefits of international cooperation, some question export-oriented development as the only path to success and they have doubts about the fairness of the current multilateral system.

3

DETAILED FINDING: TRUST OF INFORMATION AND POPULAR CHANNELS





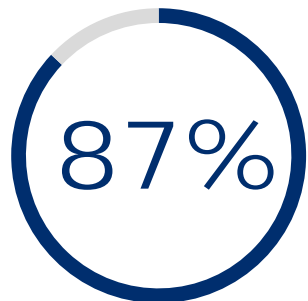
WITH THE SPREAD OF DISINFORMATION, THE
PUBLIC IS STRUGGLING TO FIND RELIABLE
AND TRUSTWORTHY INFORMATION ON
INTERNATIONAL AFFAIRS

Receiving information on international affairs

A large proportion of the public is concerned that misinformation is being spread for malicious reasons and struggle to find reliable and trustworthy information on international affairs.

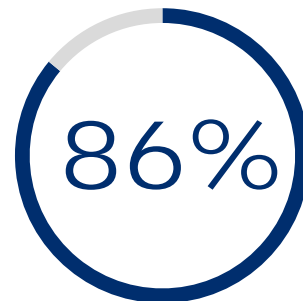
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Misleading and inaccurate information are being purposefully created and shared online



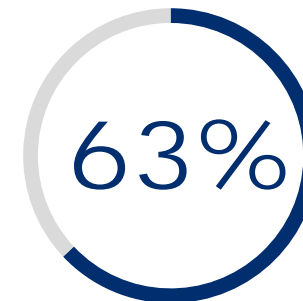
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I worry that there is a lot of fake news and false information being spread



//

It is difficult to find reliable and trustworthy information



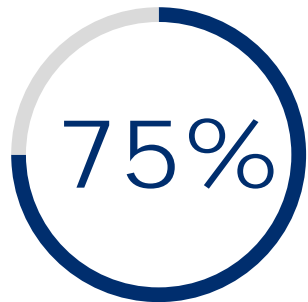
Question: Please indicate how much you agree or disagree with the following statements about receiving information on international affairs? APEC Average. Question asked of all respondents.

Information on social media

Despite knowing information on social media is fake, a large portion of the public still finds it more informative than information on traditional news sources.

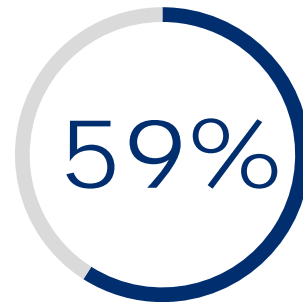
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I often see information on social media that is obviously fake



//

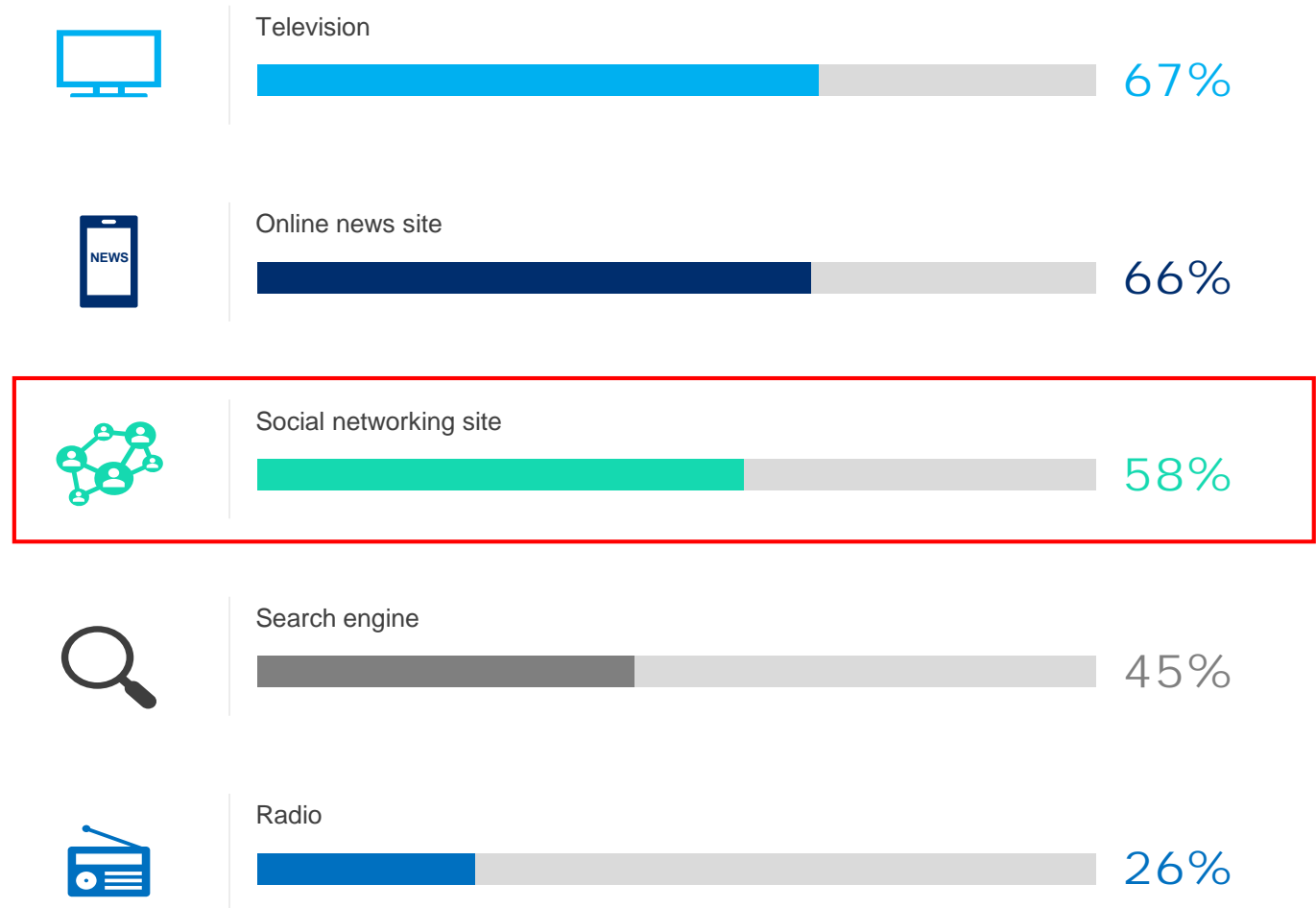
Most of the information on social media is more informative than traditional news sources



Question: Please indicate how much you agree or disagree with the following statements about receiving information on international affairs? APEC Average. Question asked of all respondents.

Social networking sites, where both information and disinformation are shared freely and in abundance, is the third most popular news channel for reading about international affairs.

Top 5 news channels of international affairs information



Question: What channels do you usually use to access information about international affairs? APEC Average. Question asked of all respondents.

KEY FINDINGS

1

A high proportion of the public has a large appetite for international news, but they are finding it challenging to access credible information on international affairs and they are worried about fake news.

2

The public is consuming international affairs information mainly via online channels, with social networking sites being the third-most-popular news channel despite a recognition of the prominence of fake news on social media platforms.

3

DETAILED FINDING: AWARENESS AND PERCEPTION OF APEC

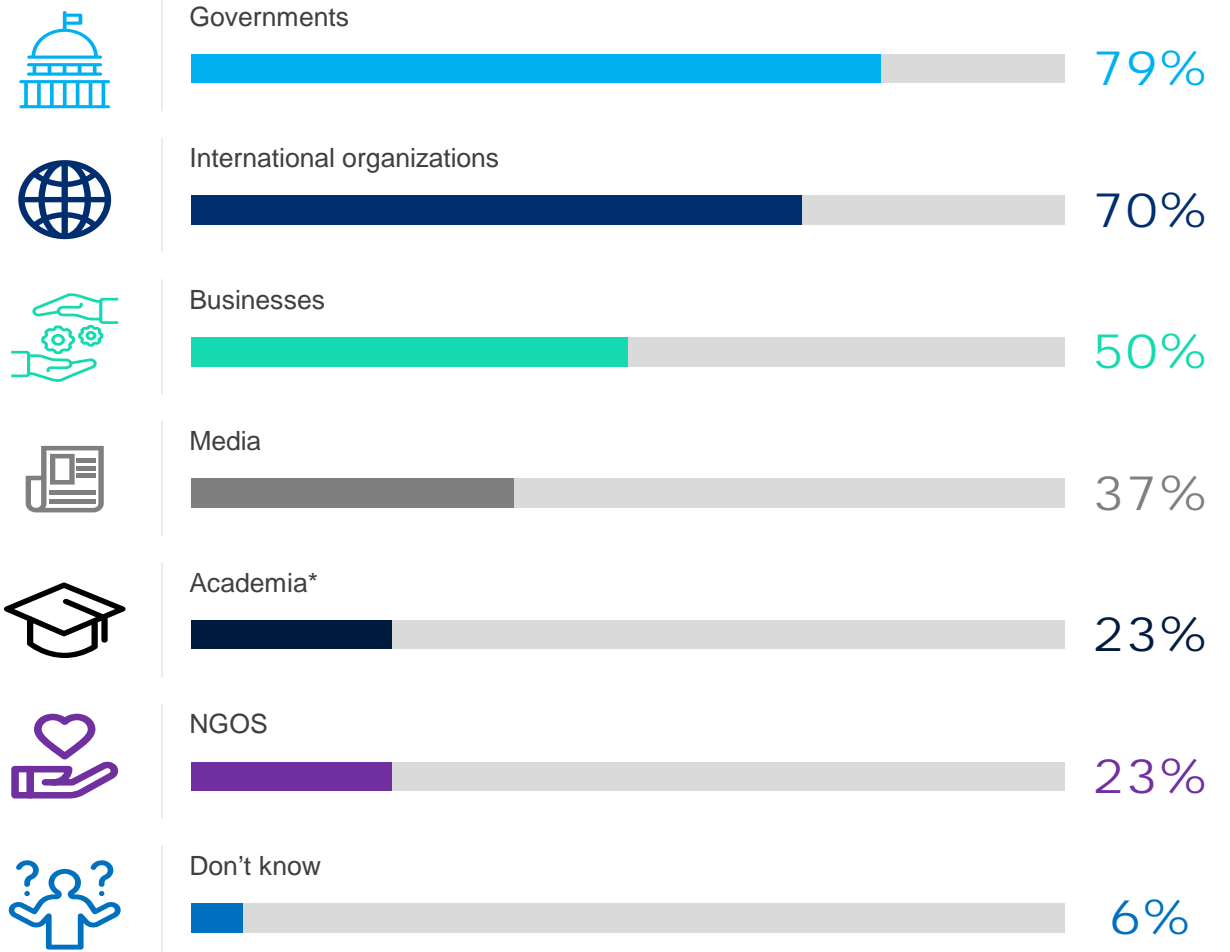


APEC IS A CREDIBLE PROMOTER OF
MULTILATERAL COOPERATION

HOWEVER, THERE ARE GAPS BETWEEN AREAS
THE PUBLIC ASSOCIATES WITH APEC AND THE
PUBLIC'S KEY CONCERNS FOR THE FUTURE

The majority of the public sees international organizations as the second key promoter for multilateralism, following governments.

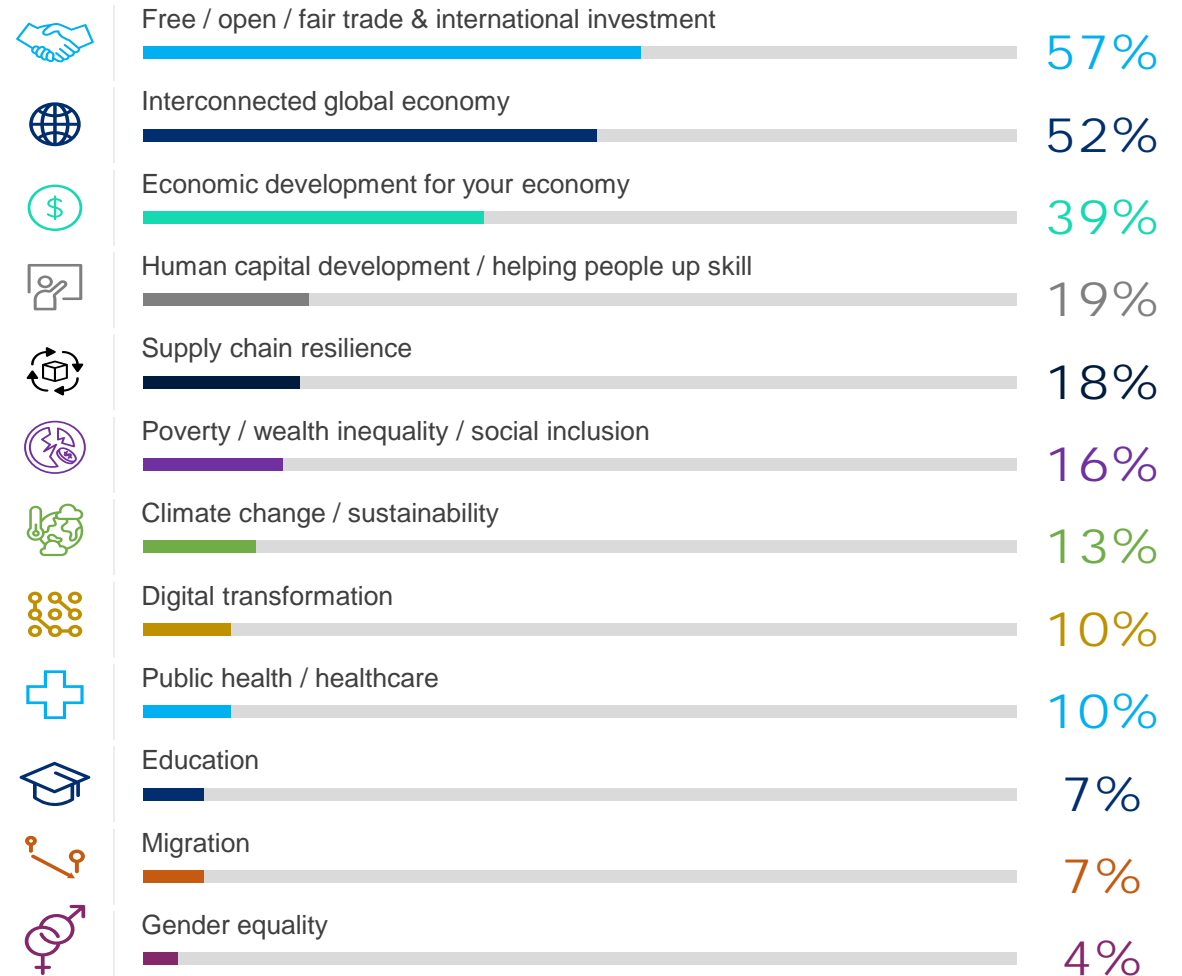
Top promoters of multilateralism



Question: Which of the following do you think is most important in boosting regional/global multilateralism?
Question asked of all respondents.*Academia: universities and think tanks. APEC Average.

APEC's support for free and open trade and the interconnected global economy are the main topics the public associate with APEC.

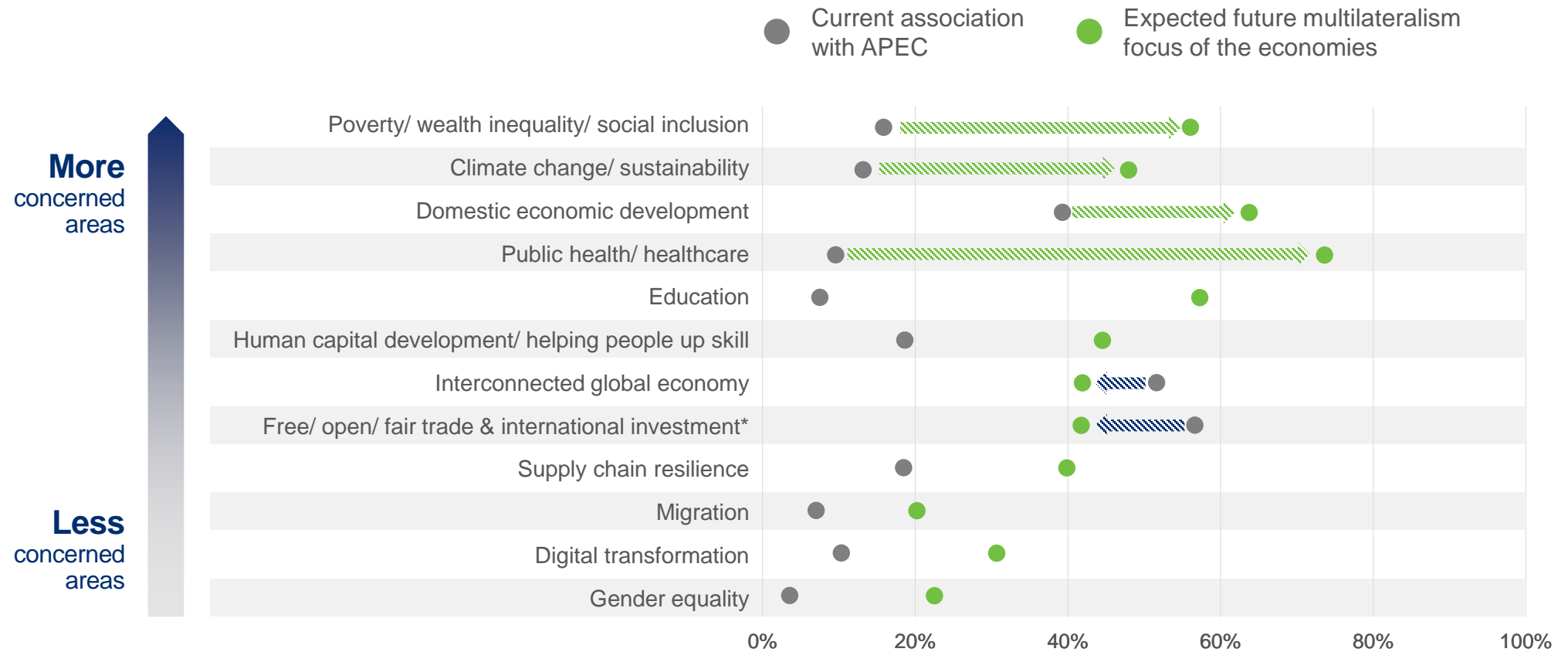
Top associations with APEC



Question: which of the following areas do you associate the Asia-Pacific Economic Cooperation (APEC) organization the most with? Question asked of all respondents. *Shown as "trade & international investment" in China. APEC Average.

AREAS OF FOCUS

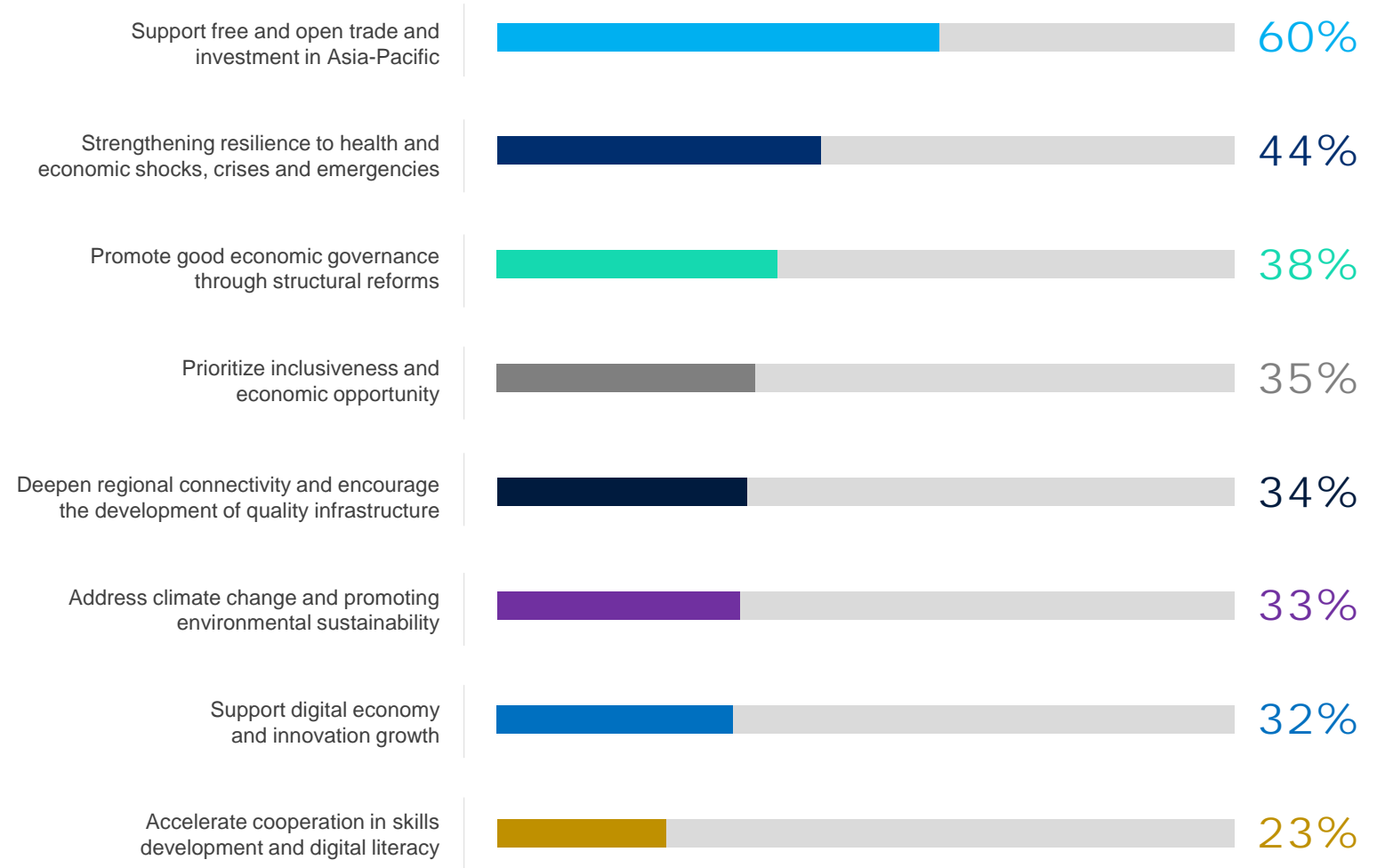
There are gaps between the public’s key concerns, expected future focus of the economies and areas they associate with APEC, especially in public health, poverty, education, and climate change. APEC needs to emphasize the importance of collaboration between economies in overcoming these challenges and mitigating the economic impact of the pandemic.



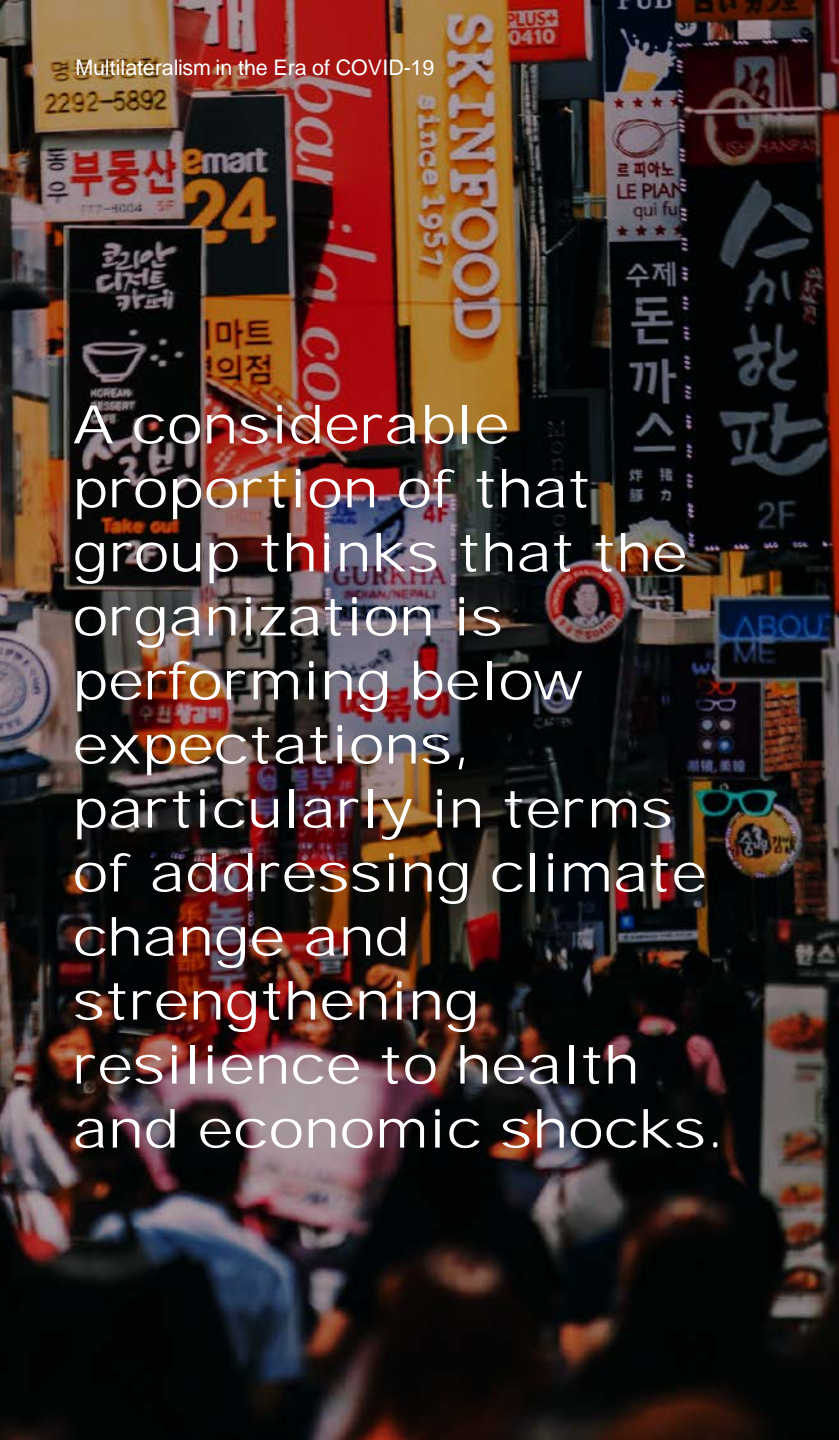
Question: How concerned are you about each of the following areas with respect to the future of [RESPONDENT'S RESIDING MARKET]? Which of the following areas do you associate the Asia-Pacific Economic Cooperation (APEC) organization the most with? In a post-COVID world, which of the following areas should be prioritized by [RESPONDENT'S RESIDING MARKET] when developing multilateral relationships? Question asked of all respondents. *Shown as "Trade & international investment" in China. APEC Average.

Looking into the future, most respondents agree that APEC should continue to support trade and investment in the Asia-Pacific region. Rebuilding pandemic-ridden domestic APEC economies is one of the public's top priorities for APEC.

Expected future focus of APEC

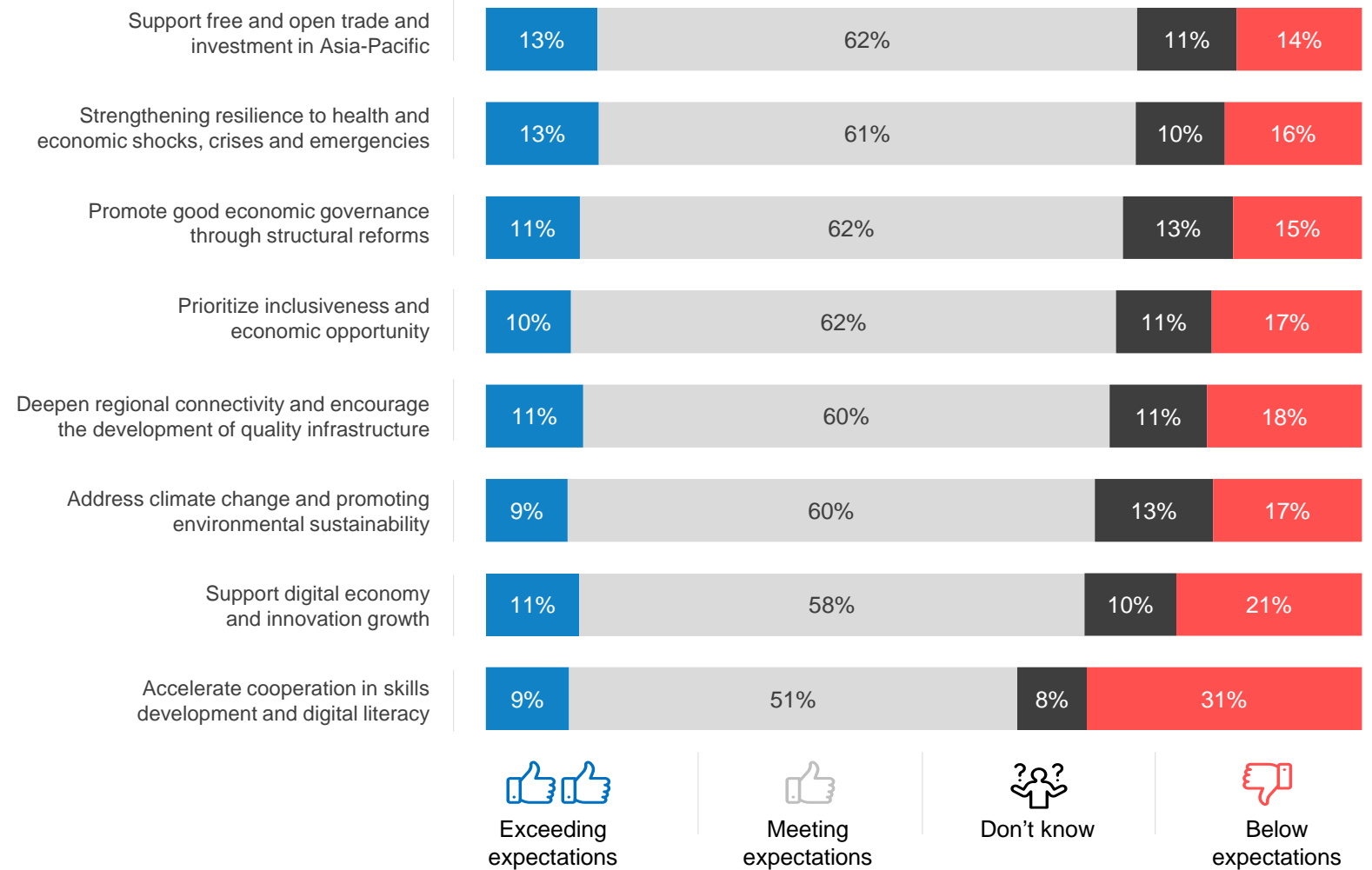


Question: Which of the following do you think should be the focus of the Asia-Pacific Economic Cooperation (APEC) organization moving forward? Question asked of all respondents. APEC Average.



A considerable proportion of that group thinks that the organization is performing below expectations, particularly in terms of addressing climate change and strengthening resilience to health and economic shocks.

Perceived performance of APEC



Question: The Asia-Pacific Economic Cooperation (APEC) is an inter-governmental forum with 21 member economies that promotes free trade in the Asia-Pacific region. How well do you think the Asia-Pacific Economic Cooperation (APEC) organization is performing in each of the following areas? Question asked of all respondents. APEC Average. Percentages may not add up to 100% due to rounding.

KEY FINDINGS

1

The public sees international organizations as key promoters of multilateralism, right behind governments, giving both a mandate to build cooperation that helps solve global challenges and promotes fairness.

2

Awareness of multilateral organizations is generally moderate.

3

While APEC's awareness is based in large part on its support for free and open trade and investment, top areas of future concern for the public are poverty/wealth inequality/social inclusion, climate change/sustainability and public health.

TAKEAWAYS FOR COMMUNICATING IN THE ERA OF COVID-19

1

INSIGHT:

The public is looking at governments and multilateral organizations to build cooperation that helps solve global challenges, promotes fairness and addresses their key concerns.

ACTION:

Align action and communication on how multilateralism is driving change in areas of social inclusion, sustainability, domestic economic development and public health

2

INSIGHT:

The public has a large appetite for international news, is mainly consuming news on international affairs online and is worried about fake news.

ACTION:

Be present, as well as a credible source that provides truthful, unbiased, reliable information that acknowledges past mistakes as well as people's concerns

3

INSIGHT:

A vast majority acknowledges that multilateralism can help overcome global crises and is the only way to fight the current pandemic.

ACTION:

Come together and communicate how economies take collective action to fight the pandemic and solve societal challenges

4

APPENDIX: OVERVIEW OF KEY FINDINGS

4

KEY FINDINGS PART 1

1

There is limited understanding of the term multilateral cooperation among the majority of those surveyed.

2

However, the public believes in the importance of economies working together to solve global and regional challenges and sees the benefits of multilateralism to achieve future economic success.

3

While many see the benefits of international cooperation, some question the benefits of export-oriented development and raise doubts about the fairness of the current multilateral system.

4

The majority of the public says that changing global politics and growing protectionism will be the key challenges to multilateralism in the post- COVID-19 future.

5

A vast majority acknowledges that multilateralism can help overcome global crises and is the only way to fight the current pandemic.

4

KEY FINDINGS PART 2

6

A high proportion of the public has a large appetite for international news but finds it challenging to access credible information on international affairs and is worried about fake news.

7

The public is consuming international affairs information mainly on online channels, with social networking sites being the third most popular news channel for reading about international affairs despite a recognition of the prominence of fake news on social media platforms.

8

The public sees international organizations as key promoters of multilateralism, right behind governments, giving both a mandate to build cooperation that helps solve global challenges and promotes fairness.

9

Awareness of APEC and other multilateral organizations is generally moderate. However, APEC ranks first compared to peers in terms of its perceived effectiveness in promoting cooperation between economies in the Asia-Pacific region.

10

While APEC's awareness is based in large parts on its support for free and open trade and investment, top areas of future concerns for the public are poverty/wealth inequality/social inclusion, climate change/sustainability and public health.

4

APPENDIX: DEMOGRAPHICS

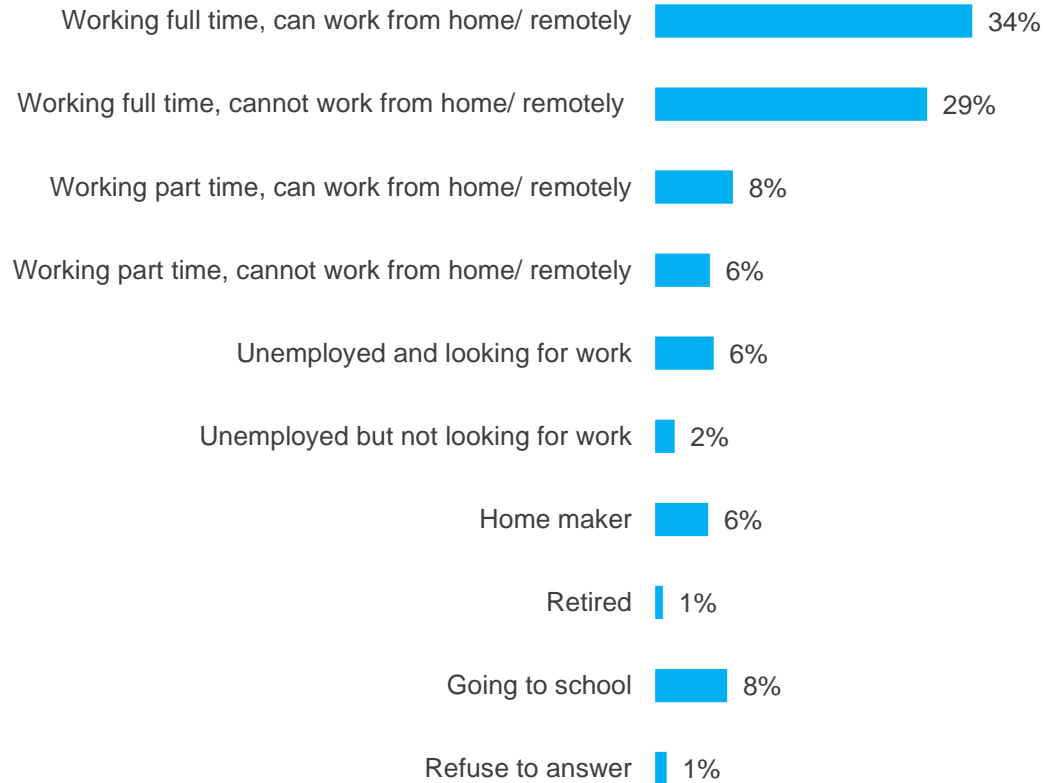


GENDER, AGE, EDUCATION

	Gender		Age				Education	
	Male	Female	Gen Z (18 – 24)	Gen Y2 (25 - 29)	Gen Y1 (30 - 39)	Gen X (40 and over)	Non-tertiary	Tertiary
APEC Average	49%	51%	18%	14%	28%	40%	38%	62%
Australia	50%	50%	18%	14%	30%	39%	42%	58%
Canada	49%	51%	18%	13%	27%	42%	41%	60%
Chile	49%	51%	20%	16%	27%	38%	52%	48%
China	51%	49%	15%	13%	28%	44%	10%	91%
Hong Kong, China	46%	54%	3%	14%	34%	49%	35%	65%
Indonesia	50%	50%	22%	14%	28%	36%	42%	58%
Japan	49%	52%	15%	11%	28%	47%	48%	53%
Republic of Korea	50%	50%	16%	13%	26%	46%	20%	80%
Malaysia	52%	48%	24%	18%	30%	29%	54%	47%
Mexico	49%	51%	23%	16%	28%	34%	43%	57%
New Zealand	50%	50%	19%	15%	27%	40%	51%	49%
Peru	49%	51%	22%	16%	29%	34%	40%	60%
The Philippines	51%	50%	25%	17%	27%	31%	27%	73%
Russia	46%	54%	20%	15%	27%	39%	35%	65%
Singapore	52%	48%	16%	14%	28%	43%	42%	58%
Chinese Taipei	50%	50%	16%	13%	28%	44%	20%	80%
Thailand	49%	51%	18%	13%	25%	45%	34%	66%
The United States	47%	53%	18%	13%	27%	42%	57%	43%
Viet Nam	50%	50%	18%	16%	30%	36%	26%	74%

EMPLOYMENT STATUS

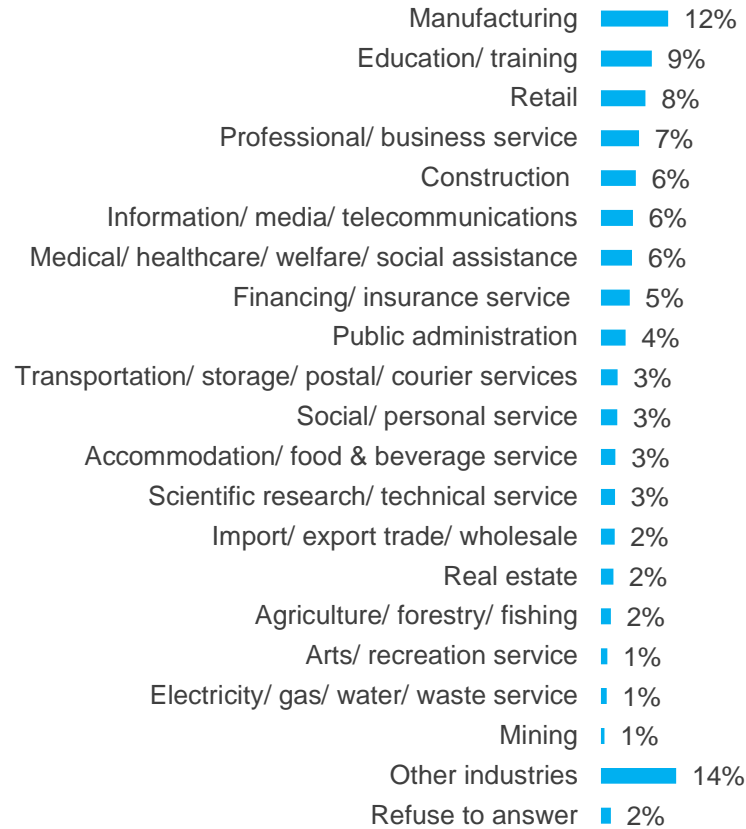
APEC Average



	Australia	Canada	Chile	China	Hong Kong, China	Indonesia	Japan	Republic of Korea	Malaysia	Mexico	New Zealand	Peru	The Philippines	Russia	Singapore	Chinese Taipei	Thailand	The United States	Viet Nam
Working full time, can work from home/ remotely	39%	39%	37%	28%	36%	34%	28%	24%	34%	32%	28%	33%	34%	31%	56%	19%	28%	35%	44%
Working full time, cannot work from home/ remotely	12%	19%	18%	57%	52%	20%	34%	34%	29%	23%	26%	17%	18%	28%	18%	56%	39%	16%	33%
Working part time, can work from home/ remotely	9%	8%	12%	2%	3%	14%	3%	3%	6%	16%	7%	18%	14%	12%	6%	4%	6%	7%	8%
Working part time, cannot work from home/ remotely	10%	7%	5%	1%	3%	8%	10%	8%	5%	8%	11%	7%	5%	5%	4%	3%	4%	6%	4%
Unemployed and looking for work	9%	7%	11%	1%	2%	4%	3%	8%	5%	7%	8%	8%	10%	8%	7%	5%	6%	10%	3%
Unemployed but not looking for work	5%	4%	2%	-	2%	2%	3%	1%	1%	1%	5%	1%	2%	-	-	1%	3%	7%	-
Home maker	8%	6%	4%	-	2%	10%	10%	8%	6%	5%	8%	4%	6%	9%	2%	2%	3%	10%	2%
Retired	2%	2%	1%	1%	-	-	-	1%	-	-	-	1%	1%	2%	1%	1%	1%	4%	1%
Going to school	6%	8%	8%	10%	2%	6%	8%	13%	12%	9%	4%	11%	10%	5%	7%	9%	8%	5%	6%
Refuse to answer	1%	1%	3%	1%	-	2%	1%	1%	2%	1%	3%	1%	2%	1%	1%	-	2%	2%	1%

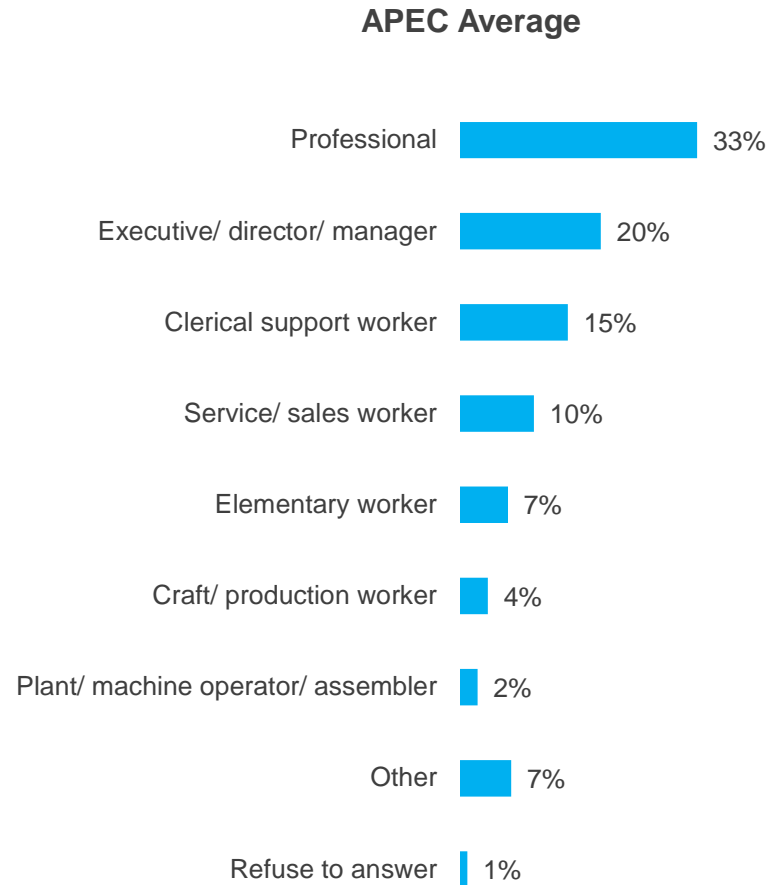
INDUSTRY

APEC Average



	Australia	Canada	Chile	China	Hong Kong, China	Indonesia	Japan	Republic of Korea	Malaysia	Mexico	New Zealand	Peru	The Philippines	Russia	Singapore	Chinese Taipei	Thailand	The United States	Viet Nam
Manufacturing	7%	6%	6%	25%	9%	10%	18%	24%	13%	6%	8%	2%	8%	14%	12%	21%	16%	8%	16%
Education/ training	11%	11%	12%	8%	10%	10%	4%	12%	8%	10%	10%	10%	11%	7%	9%	13%	3%	4%	11%
Retail	11%	9%	8%	4%	9%	7%	5%	8%	8%	11%	10%	4%	9%	8%	5%	4%	17%	9%	11%
Professional/ business service	11%	7%	13%	7%	6%	5%	4%	4%	7%	8%	7%	9%	7%	7%	12%	5%	3%	7%	4%
Construction	4%	4%	9%	5%	8%	5%	3%	4%	7%	10%	7%	9%	8%	11%	3%	3%	6%	7%	8%
Information/ media/ telecommunications	7%	6%	3%	5%	5%	6%	8%	8%	7%	3%	7%	4%	8%	2%	8%	8%	3%	10%	4%
Medical/ healthcare/ welfare/ social assistance	11%	9%	5%	2%	6%	3%	9%	7%	5%	3%	10%	5%	3%	5%	5%	5%	3%	8%	5%
Financing/ insurance service	6%	5%	4%	4%	7%	5%	6%	4%	6%	3%	5%	5%	5%	7%	8%	5%	3%	10%	3%
Public administration	3%	3%	7%	7%	4%	3%	4%	5%	4%	4%	5%	8%	4%	2%	4%	4%	4%	3%	7%
Transportation/ storage/ postal/ courier services	4%	3%	2%	3%	4%	3%	6%	3%	1%	3%	3%	2%	3%	5%	6%	2%	1%	2%	2%
Social/ personal service	3%	3%	1%	1%	6%	4%	4%	2%	1%	4%	3%	6%	3%	4%	1%	3%	2%	2%	3%
Accommodation/ food & beverage service	2%	3%	2%	1%	3%	6%	3%	2%	2%	4%	4%	1%	1%	-	2%	3%	4%	4%	3%
Scientific research/ technical service	1%	3%	3%	5%	3%	1%	3%	3%	3%	2%	3%	2%	1%	3%	2%	5%	1%	1%	2%
Import/ export trade/ wholesale	-	-	2%	5%	6%	5%	2%	1%	2%	3%	1%	3%	1%	1%	2%	5%	4%	1%	1%
Real estate	2%	1%	2%	3%	3%	2%	3%	3%	2%	3%	1%	1%	4%	2%	2%	2%	3%	2%	2%
Agriculture/ forestry/ fishing	1%	1%	3%	2%	-	5%	-	1%	1%	2%	3%	1%	1%	2%	-	2%	5%	1%	3%
Arts/ recreation service	4%	1%	1%	-	1%	1%	1%	2%	1%	-	1%	2%	1%	1%	1%	1%	1%	1%	1%
Electricity/ gas/ water/ waste service	1%	2%	1%	2%	-	1%	1%	1%	1%	1%	-	1%	1%	1%	1%	2%	1%	1%	-
Mining	-	1%	2%	1%	-	2%	-	1%	-	-	-	3%	-	1%	-	-	-	-	1%
Other industries	8%	17%	12%	11%	9%	17%	15%	7%	18%	18%	8%	19%	21%	13%	14%	8%	14%	18%	13%
Refuse to answer	1%	3%	3%	1%	1%	3%	1%	1%	1%	2%	2%	1%	2%	4%	2%	1%	6%	2%	1%

PROFESSIONAL LEVEL



	Australia	Canada	Chile	China	Hong Kong, China	Indonesia	Japan	Republic of Korea	Malaysia	Mexico	New Zealand	Peru	The Philippines	Russia	Singapore	Chinese Taipei	Thailand	The United States	Viet Nam
Professional	39%	38%	52%	39%	23%	23%	23%	22%	31%	31%	35%	51%	36%	47%	36%	40%	15%	25%	30%
Executive/ director/ manager	20%	19%	11%	36%	25%	17%	5%	17%	29%	17%	18%	16%	10%	19%	34%	12%	21%	26%	21%
Clerical support worker	14%	12%	10%	11%	30%	20%	26%	26%	10%	15%	10%	5%	19%	11%	12%	14%	9%	6%	22%
Service/ sales worker	13%	8%	10%	5%	10%	14%	22%	10%	10%	10%	15%	10%	13%	5%	7%	10%	7%	12%	9%
Elementary worker	2%	3%	5%	3%	5%	6%	4%	4%	7%	15%	7%	7%	3%	3%	3%	17%	27%	2%	2%
Craft/ production worker	1%	3%	3%	1%	1%	4%	8%	13%	1%	4%	6%	2%	2%	9%	1%	1%	8%	4%	4%
Plant/ machine operator/ assembler	1%	2%	5%	1%	2%	5%	4%	-	1%	4%	4%	2%	1%	2%	1%	2%	3%	4%	3%
Other	9%	12%	4%	3%	5%	10%	9%	7%	8%	4%	4%	6%	13%	4%	6%	5%	9%	17%	8%
Refuse to answer	1%	2%	-	-	-	1%	-	1%	1%	1%	2%	-	4%	1%	1%	-	1%	3%	1%



**Asia-Pacific
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