



ANNUAL CHINA-INDONESIA SURVEY

INSIGHTS INTO INDONESIAN PERCEPTION OF CHINA

2025



Muhammad Zulfikar Rakhmat
Bhima Yudhistira Adhinegara
Yeta Purnama

ANNUAL CHINA-INDONESIA SURVEY

INSIGHTS INTO INDONESIAN PERCEPTION OF CHINA 2025

Authors

Muhammad Zulfikar Rakhmat
Bhima Yudhistira Adhinegara
Yeta Purnama

Reviewer

Media Wahyudi Askar

Designer

Muhammad Haedar Zhafran H

Publication

December 2025

Publisher

Center of Economic and Law Studies (CELIOS)
Jakarta, Indonesia

Email Address

admin@celios.co.id

Website

www.celios.co.id

Copyrights

© 2025 CELIOS
CELIOS holds the copyright for this publication,
including the text, analysis, logos, and layout
design. Any request to reproduce or distribute
part or all of this publication should be directed
to admin@celios.co.id

Citation

Content from this publication, produced by
CELIOS, may be quoted and referenced freely,
provided that proper credit is given to the
original source.



EXECUTIVE SUMMARY

The 2025 China–Indonesia Survey offers a fresh and timely snapshot of how Indonesians view China across political, economic, security, cultural, and education-related dimensions.

Conducted a year after Indonesia’s political transition, the survey captures shifting attitudes as the new administration deepens engagement with China while navigating global power competition.

The findings reveal a mix of pragmatic openness, strategic caution, and nuanced public sentiment across key areas of bilateral cooperation.

KEY FINDINGS

Overall Indonesia–China Relations

Public sentiment remains broadly positive, with 48% describing the relationship as positive and 18% as very positive, totaling 66%. In contrast, 32% view the relationship negatively, and 2% very negatively, showing that while optimism dominates, a notable minority remains cautious.

Perceived Closeness of President Prabowo to China

A strong majority (94%) perceive the President as close or very close to China, with only 6% considering him not close.

Indonesia’s BRICS Membership

Nearly unanimous support is observed (98% positive), with access to new markets (29%), strengthening bargaining positions (27%), and reducing dependence on Western countries (26%) as top reasons.

Most Significant Area of Bilateral Relations

Economic cooperation overwhelmingly stands out as the defining pillar of Indonesia–China ties (71%), with technology (12%) following distantly. Political cooperation (10%), security/defense (4%), and cultural exchanges (3%) are considered secondary.

Perceived Impact of Prabowo’s Closeness

Economic opportunities (31%) and strengthened diplomacy (26%) top the list of positive impacts, followed by balancing U.S. influence (22%). Minor concerns exist regarding sovereignty (7%) and public perception (8%).

Trust in China for Energy Transition

A combined 92% agree or strongly agree that China can be a reliable partner, citing job creation (29%), green technology access (25%), project track record (24%), and affordable financing (20%).



Interest in Chinese Electric Vehicles

Respondents are split: 58% express interest, while 42% are hesitant. Key concerns include limited charging stations (24%), after-sales service (20%), and quality/reliability (19%).

Preferred Country for Overseas Study

China leads at 31%, followed by Australia (26%), the United Kingdom & EU (22%), and the U.S. (13%). Scholarships (42%) and affordability (23%) are primary drivers for choice.

Preferred Primary Partner for Indonesia

China is the top choice (32%), followed by other Western countries (22%) and ASEAN neighbors (17%). Economic opportunity (27%) and reliable investment sources (20%) dominate reasoning, with defense/security (22%) and shared values (15%) also important.

Preferred Source for Defense Equipment

Russia is favored (42%), followed by China (19%), U.S. (13%), domestic industry (13%), and EU (9%). Superior technology (29%) and partner trustworthiness (19%) are the most influential factors.

Support for High-Speed Rail Extension to Surabaya

Strong public support (78%) exists, with transportation modernization (28%), improved connectivity (26%), and economic growth (26%) cited as primary motivations.

The 2025 findings paint a picture of an Indonesian public that is open to cooperation with China but grounded in pragmatic caution. Economic opportunity remains the strongest bridge, particularly in trade, infrastructure, and green-energy investment. Yet concerns persist around over-reliance, sovereignty, technology dependence, and labor issues.

Simultaneously, education and mobility trends show growing interest in China as a destination, driven largely by affordability and scholarship access rather than cultural or geopolitical alignment.

As Indonesia positions itself amid major-power rivalry, the public's outlook remains consistently pragmatic, multi-aligned, and sovereignty-focused—seeking benefits from all partners while avoiding entanglement with any single power. This balanced perspective will continue to shape Indonesia's foreign policy and its evolving relationship with China in the years ahead.

TABLE OF CONTENT

03	Executive Summary
09	Introduction and Methodology
12	Key Findings
44	Respondent Profiles
47	Conclusion

LIST OF ABBREVIATIONS

ASEAN	: Association of Southeast Asian Nations
BRICS	: Brazil, Russia, India, China, and South Africa
EU	: European Union
EV	: Electric Vehicle
NDB	: New Development Bank
SMA	: Sekolah Menengah Atas/ Senior High School
SMK	: Sekolah Menengah Kejuruan/ Vocational High School
SMP	: Sekolah Menengah Pertama/ Junior High School
UK	: United Kingdom
US	: United States

INTRODUCTION AND METHODOLOGY

INTRODUCTION

The 2025 China–Indonesia Survey captures how Indonesians view China at a time when the bilateral relationship is increasingly visible across politics, the economy, technology, and society. Conducted one year after the inauguration of President Prabowo Subianto and Indonesia’s entry into Brazil, Russia, India, China, and South Africa (BRICS), this year’s findings offer a timely picture of how the public perceives China’s role in Indonesia’s national trajectory.

The survey examines overall sentiment toward Indonesia–China relations and identifies which areas of cooperation—ranging from economics and politics to technology, culture, and security—are seen as most influential. It also measures public perceptions of President Prabowo’s closeness with China, including how this relationship is understood in terms of diplomacy, economic opportunities, international positioning, and national sovereignty.

As China’s footprint continues to grow in Indonesia’s development agenda, the survey explores views on BRICS membership, energy transition partnerships, infrastructure cooperation, and large-scale projects such as high-speed rail. It also captures public opinions on the use of Chinese labor in infrastructure works and the expansion of transportation initiatives involving China.

The increasing presence of Chinese technology in Indonesian daily life is another key focus. This includes public interest in Chinese electric vehicles (EV), assessments of quality and safety, and considerations around charging infrastructure and after-sales support. In parallel, education-related questions provide insight into preferred study destinations abroad and the appeal of China’s universities compared to other global options.

Beyond development and technology, the survey addresses Indonesia’s broader foreign policy environment. Respondents identify their preferred international partners, evaluate the reliability of different countries as sources of defense equipment, and share their views on the balance of major power relations shaping Indonesia’s strategic choices.

Taken together, the results of this year’s survey offer a deeper understanding of how Indonesians view China and how these views intersect with national priorities under the country’s new leadership. As Indonesia navigates shifting global dynamics and strengthens ties across regions, these insights shed light on the evolving public mood toward one of its most significant international partners.



METHODOLOGY

The 2025 China–Indonesia Survey was designed to capture a clear and comprehensive picture of Indonesian attitudes toward China during a period of heightened geopolitical and economic engagement. This year's study represents the second wave of an ongoing effort to track how public sentiment evolves over time.

SAMPLING FRAMEWORK

The survey engaged 1,022 respondents from across Indonesia's provinces. Participants were selected to reflect the country's demographic composition, encompassing diverse educational backgrounds, employment categories, and geographic locations to ensure broad representation of Indonesian society. With this sample size, the survey has a margin of error of ± 3.1 percentage points at the 95 percent confidence level.

DATA COLLECTION APPROACH

Data were gathered through an online survey distributed via widely used digital channels. Targeted outreach was conducted through social media platforms such as Facebook and Instagram, allowing the survey to reach respondents in both densely populated urban centers and more remote regions. This digital approach enabled efficient nationwide coverage and encouraged participation from diverse population groups.

SURVEY INSTRUMENT

The questionnaire consisted of structured, close-ended questions covering a range of issues relevant to contemporary Indonesia–China relations. Themes included assessments of diplomatic ties, views on BRICS membership, energy cooperation, infrastructure projects, defense procurement, education opportunities, and consumer perceptions of Chinese technology and products. The instrument was designed to be concise and accessible while allowing for nuanced responses, particularly in questions that offered multiple-choice reasoning options.

DATA PROCESSING AND INTERPRETATION

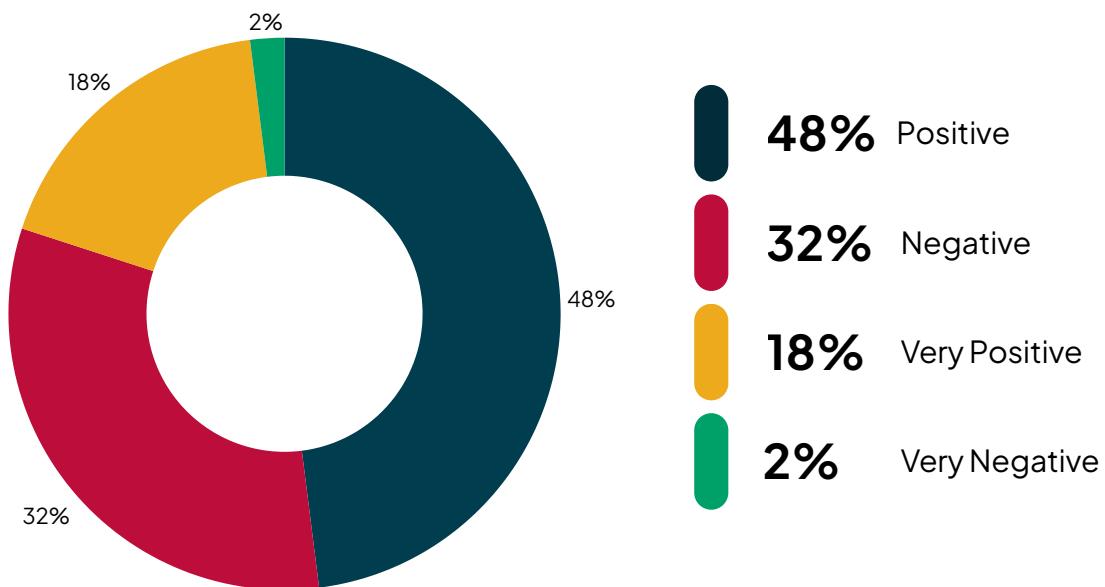
After data collection, responses were cleaned, coded, and weighted prior to statistical analysis. To ensure that the survey results accurately reflect Indonesia's adult population aged 18 years and above, statistical weighting techniques were applied based on gender, age, province, level of education, and income, drawing on official data from the Badan Pusat Statistik (BPS). Descriptive and comparative analytical techniques were then employed to identify patterns across provinces, gender groups, employment categories, and educational levels. Crosstabulations were generated to examine how demographic factors shape perceptions on key issues such as BRICS, electric vehicles, labor policies, and preferred international partners. This analytical process aimed to identify both consistent trends and areas of divergence, providing a nuanced understanding of how Indonesians view China's role in the country today.



KEY FINDINGS

OVERALL PERCEPTION OF INDONESIA–CHINA RELATIONS

Question: “How do you assess the overall relationship between Indonesia and China?”



Overall perceptions of Indonesia–China relations are broadly favorable, with 18% of respondents describing the relationship as very positive and another 48% as positive. This means a combined 66% hold a positive view of bilateral ties. In contrast, 32% of respondents view the relationship negatively, while a small 2% consider it very negative, bringing total negative sentiment to 34%.

These results suggest that while optimism dominates public opinion, a substantial minority remains cautious or dissatisfied with the state of Indonesia–China relations. The very small share reporting very negative perceptions indicates that strong opposition is limited, but the overall negative proportion remains significant enough to highlight underlying concerns.

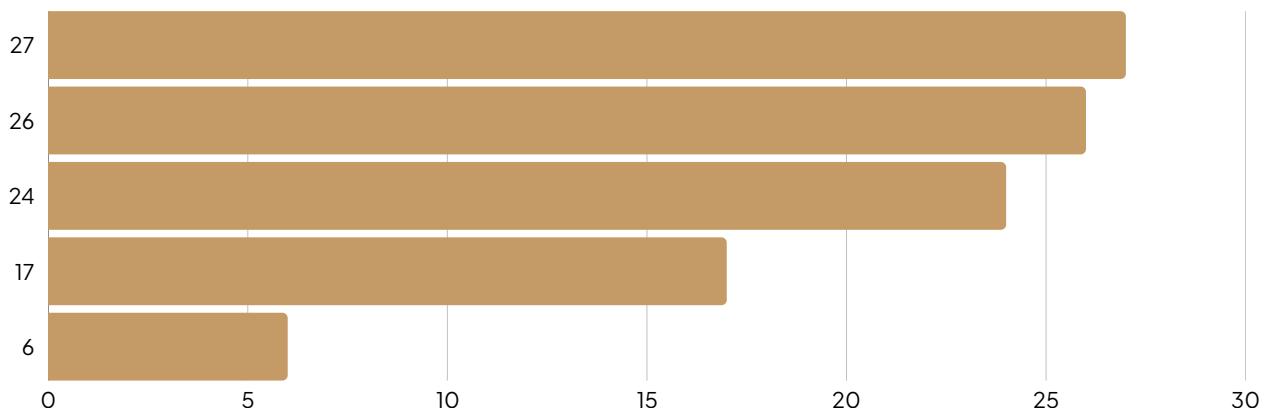


“Overall, perceptions of Indonesia–China relations are broadly positive.”

Photo source: Berita Nasional

REASONS FOR NEGATIVE PERCEPTIONS OF INDONESIA–CHINA RELATIONS

Question: “If you view the relationship negatively, please select up to three reasons from the list below.”



- █ **27%** Sovereignty issues in the Natuna waters
- █ **26%** Strategic competition/lack of trust
- █ **24%** Negative media coverage

- █ **17%** Human rights issues
- █ **6%** Others

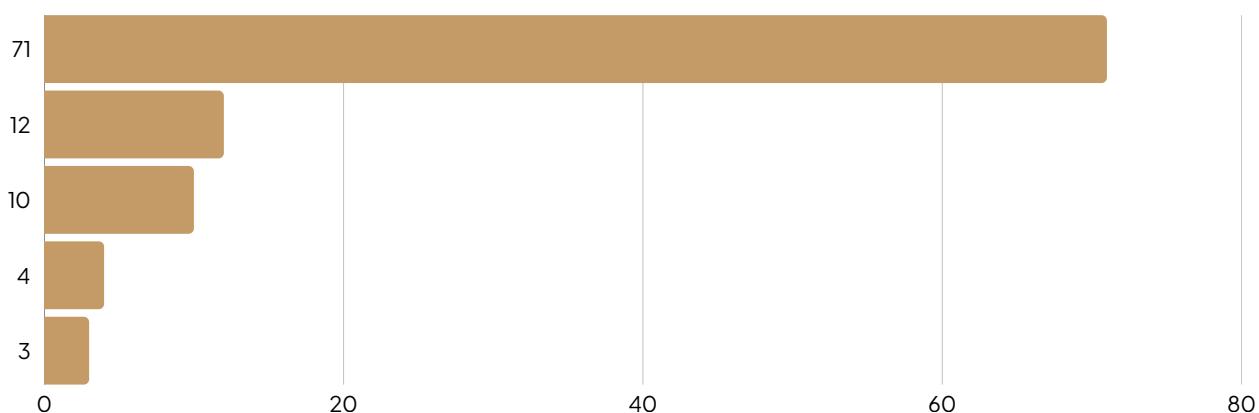
Among respondents who view Indonesia–China relations negatively, concerns are driven by several key issues. The most cited reason is sovereignty issues in the Natuna waters (27%), indicating that territorial concerns remain central in shaping negative perceptions. This is closely followed by strategic competition and lack of trust (26%), suggesting apprehension about China’s broader geopolitical intentions. Negative media coverage also plays a significant role, with 24% attributing their negative views to the portrayal of China in the news.

Other contributing factors include human rights issues (17%), which—while less dominant—still influence a notable portion of respondents. A small group (6%) selected other reasons, showing that additional concerns exist but are less widespread. Overall, the pattern suggests that security and sovereignty concerns, coupled with media narratives, are the primary drivers of negative sentiment.

3

MOST SIGNIFICANT SECTOR IN INDONESIA–CHINA RELATIONS

Question: “In your view, which sector is the most significant in Indonesia–China relations?”



71% Economic cooperation

12% Technology

10% Political cooperation

4% Security/defense

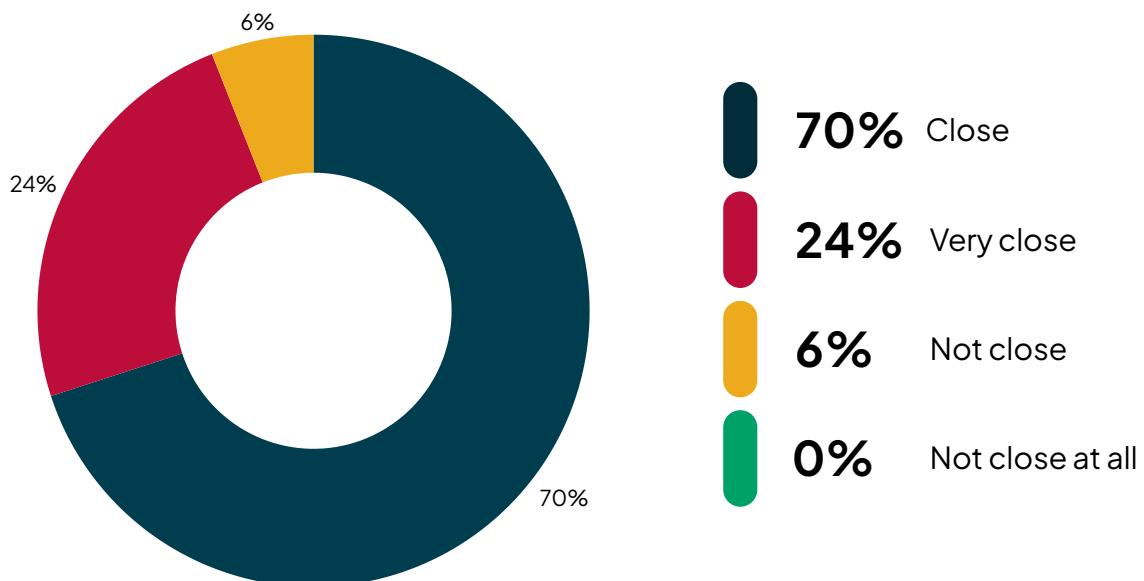
3% Cultural exchanges

When asked which sector stands out as the most significant in Indonesia–China relations, an overwhelming majority (71%) identify economic cooperation as the key area. This reflects the strong emphasis Indonesians place on trade, investment, and infrastructure cooperation as the core of bilateral ties. The next most recognized sector is technology, but at a considerably lower 12%, indicating that while technological collaboration is visible, it is not yet perceived as central.

Other sectors receive much less attention: political cooperation (10%), security/defense (4%), and cultural exchanges (3%) are each viewed as relatively minor contributors to the relationship. The distribution underscores that public perception of Indonesia–China relations is overwhelmingly shaped by economic engagement, with other forms of cooperation viewed as secondary.

PERCEPTION OF PRESIDENT PRABOWO'S CLOSENESS TO CHINA

Question: "How do you perceive President Prabowo's closeness to China?"



A large majority of respondents perceive President Prabowo as being close to China, with 70% describing him as close and another 24% as very close, totaling 94%. This indicates a strong public impression that the President maintains a high level of engagement with China. Only 6% of respondents believe he is not close, and none (0%) say he is not close at all. Overall, the results suggest that Indonesians widely associate Prabowo's foreign policy stance with a significant degree of interaction and alignment with China.



“A clear majority of Indonesians see President Prabowo as closely aligned with China.”

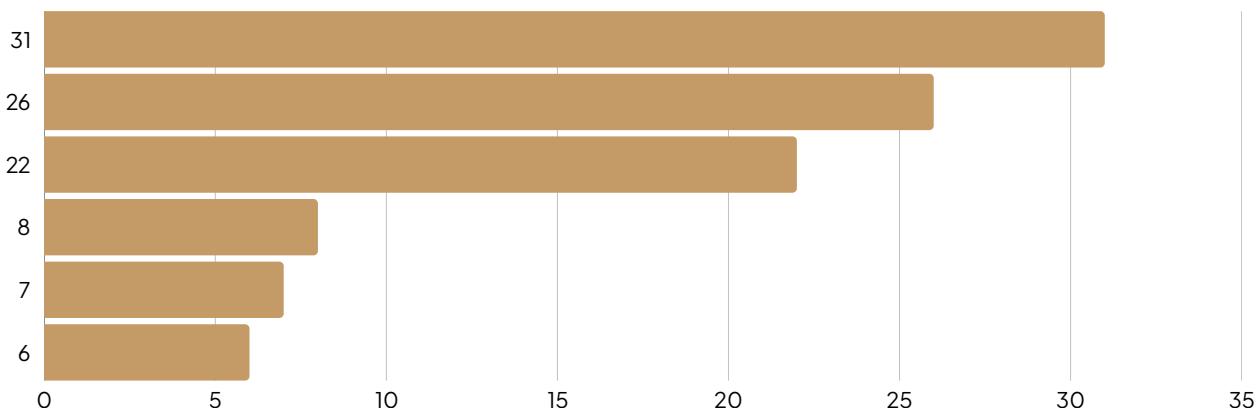
Photo source: Presiden Republik Indonesia



5

PERCEIVED IMPACT OF PRESIDENT PRABOWO'S CLOSENESS TO CHINA

Question: “If you consider President Prabowo close or very close to China, what do you think are the impacts of this closeness? (Select up to 3 options)”



- 31% Opening economic opportunities
- 26% Strengthening Indonesia's diplomacy
- 22% Balancing the U.S. influence

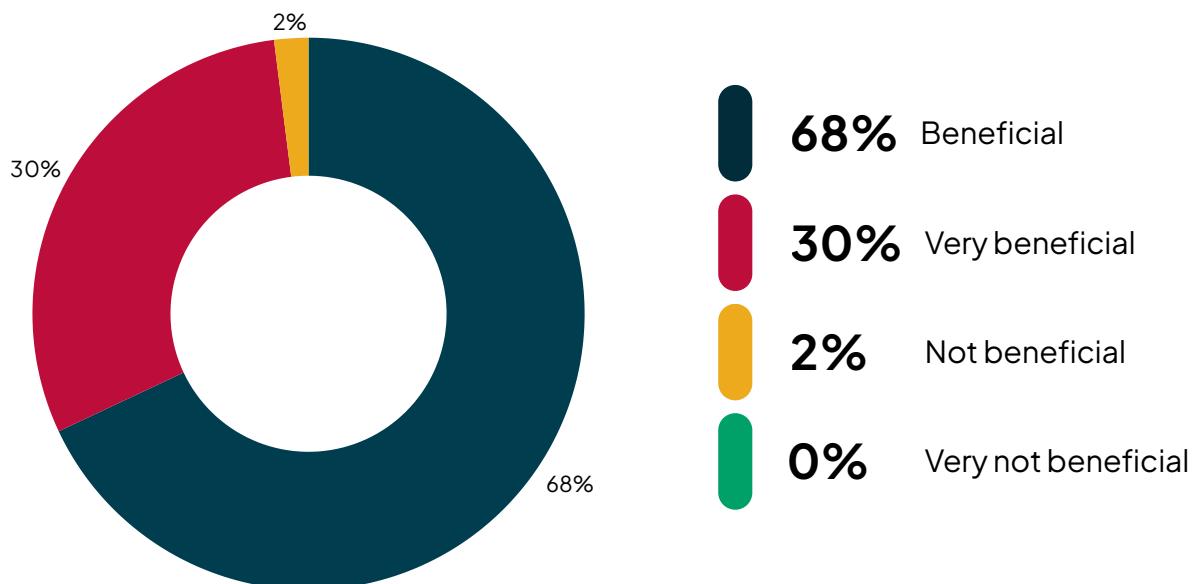
- 8% Being viewed negatively by the public
- 7% Weakening Indonesia's sovereignty
- 6% Tilting too much toward China

Among respondents who perceive President Prabowo as close to China, the most commonly cited impact is the potential to open economic opportunities (31%), reflecting expectations of economic gains from closer ties. This is followed by the view that such closeness could strengthen Indonesia's diplomacy (26%), and balance The United States (U.S) influence (22%), suggesting that many see strategic advantages in maintaining strong relations with China.

Concerns also exist, though to a lesser degree. 8% believe this closeness could be viewed negatively by the public, 7% worry it may weaken Indonesia's sovereignty, and 6% think it could result in Indonesia becoming too aligned with China. While positive expectations dominate, these minority concerns highlight the presence of sensitivity around foreign alignment and national sovereignty.

PERCEIVED BENEFITS OF INDONESIA JOINING BRICS

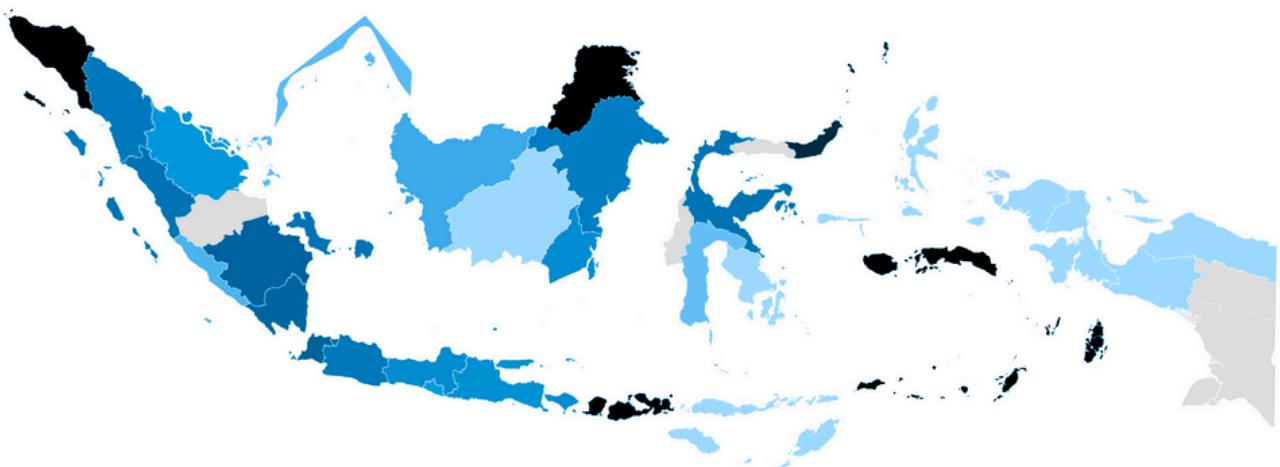
Question: "Indonesia has joined BRICS. Do you think Indonesia will benefit from joining BRICS?"



Public sentiment toward Indonesia's entry into BRICS is highly positive. A combined 98% of respondents believe that joining BRICS will be either beneficial (68%) or very beneficial (30%), indicating strong confidence that participation in the grouping will provide advantages for Indonesia in economic or strategic terms.

Only 2% of respondents view BRICS membership as not beneficial, and none (0%) consider it very not beneficial. This very small share of negative responses suggests broad public support for Indonesia's involvement in BRICS and optimism regarding the opportunities it may bring.

FROM ACEH TO PAPUA: MAPPING PROVINCIAL SUPPORT FOR INDONESIA'S BRICS ENTRY



Powered by Bing
© Microsoft, OpenStreetMap

The provincial breakdown reveals strong nationwide support for Indonesia's membership in BRICS. Nationally, 30% say joining BRICS is very beneficial, 68% view it as beneficial, while only 2% consider it harmful and less than 1% say very harmful.

Across provinces, several regions show exceptionally high enthusiasm, with Aceh (80%), West Nusa Tenggara (60%), North Sulawesi (50%), North Kalimantan (100%), and Maluku (100%) reporting large shares of respondents who see BRICS as very beneficial. Meanwhile, a wide set of provinces—including Central Kalimantan, North Maluku, East Nusa Tenggara, Papua, West Papua, Southwest Papua, Central Papua, and Southeast Sulawesi—record 100% “beneficial” responses, indicating uniform positive perceptions.

Only a handful of provinces show minor levels of concern, such as DI Yogyakarta, Central Java, South Sulawesi, and North Sumatra, where small percentages (between 2–5%) view BRICS membership as harmful. Very harmful responses appear only in DI Yogyakarta (2.38%) and Central Java (1.22%). Overall, the data demonstrates consistently positive sentiment toward BRICS across Indonesia's provinces, with very limited opposition.



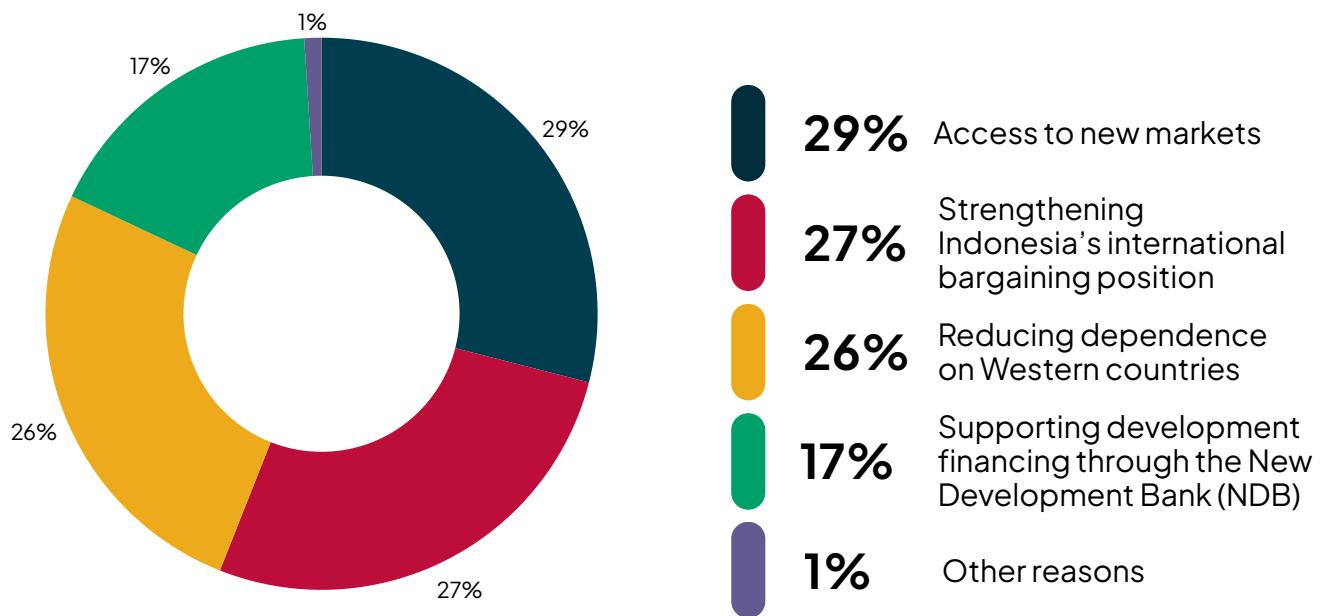
“Public sentiment toward Indonesia’s entry into BRICS is overwhelmingly positive.”

Photo source: Portal Kemlu



REASONS INDONESIA'S BRICS MEMBERSHIP IS SEEN AS BENEFICIAL

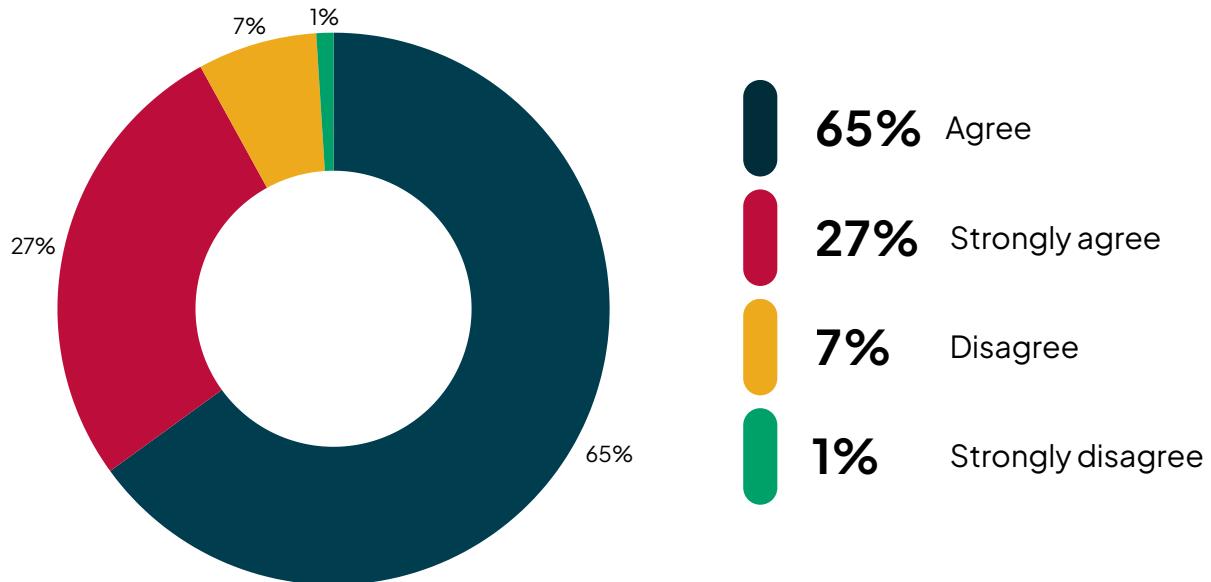
Question: “If you believe Indonesia’s BRICS membership is beneficial, please select up to three reasons.”



Among respondents who view BRICS membership as beneficial, the most frequently cited reason is access to new markets (29%), showing that many expect Indonesia to gain expanded economic opportunities. Close behind, 27% of respondents believe BRICS will strengthen Indonesia's bargaining position internationally, signaling expectations of greater geopolitical influence. Additionally, 26% highlight the potential for reducing dependence on Western countries, reflecting a desire for more diversified international partnerships. A smaller but still significant share (17%) sees benefits through development financing from the New Development Bank (NDB). While less prominent than market access or strategic gains, this indicates awareness that BRICS participation may support Indonesia's development agenda.

TRUST IN CHINA AS A RELIABLE PARTNER FOR INDONESIA'S ENERGY TRANSITION

Question: Do you believe China can be a reliable partner for Indonesia's energy transition?

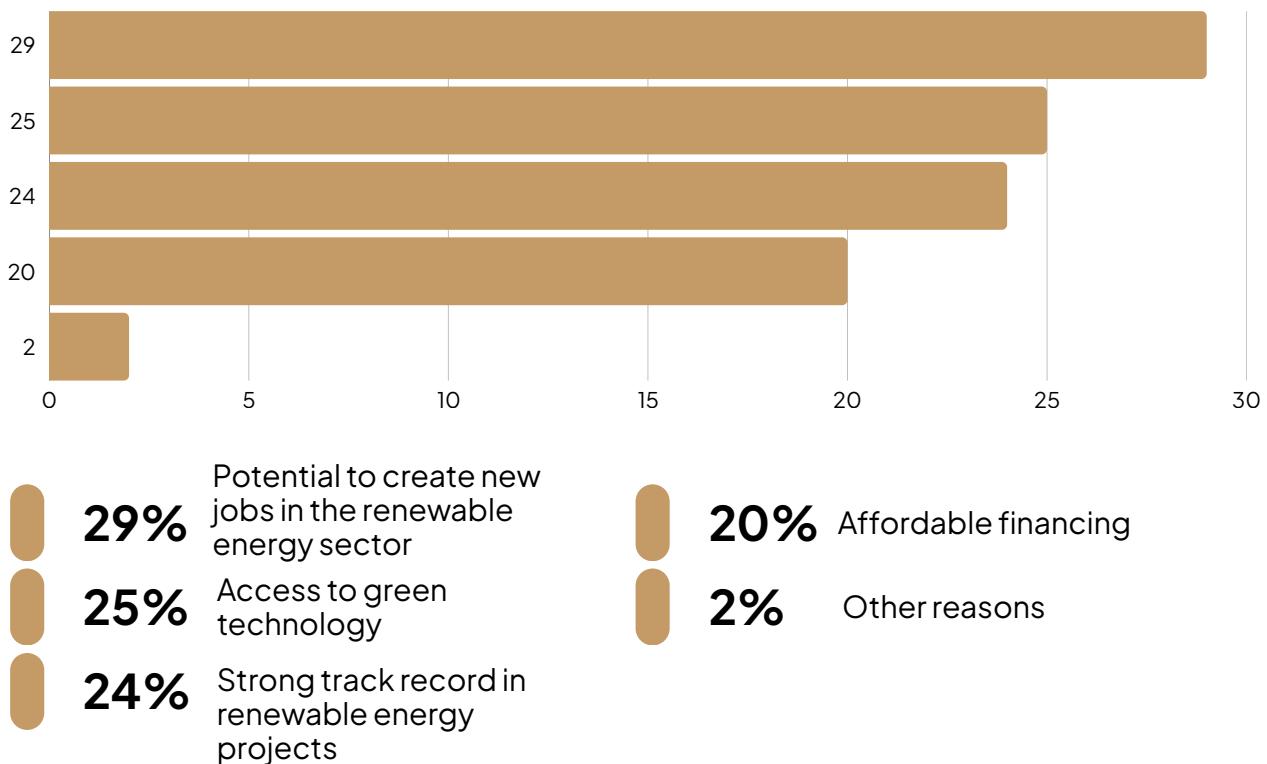


A substantial majority of respondents express confidence in China's role in supporting Indonesia's energy transition. A combined 92% either agree (65%) or strongly agree (27%) that China can be a reliable partner for advancing clean energy initiatives such as solar, hydropower, and wind power. This suggests a broad expectation that China can contribute meaningfully to Indonesia's shift toward cleaner energy sources. Only 7% disagree and 1% strongly disagree, indicating that skepticism exists but is limited. Overall, the data show that most respondents view China as a capable and dependable collaborator in the clean energy sector.

10

REASONS FOR TRUSTING CHINA AS A PARTNER IN INDONESIA'S ENERGY TRANSITION

Question: “If you agree that China can be a reliable partner for Indonesia’s energy transition, please select up to three reasons.”



Respondents who trust China as a partner in Indonesia's energy transition highlight several key motivations. The most frequently cited reason is the potential to create new jobs in the renewable energy sector (29%), suggesting that economic and employment benefits are a major factor shaping positive views. This is followed by access to green technology (25%) and China's track record in renewable energy projects (24%), indicating recognition of China's technical capabilities and experience. Additionally, 20% point to affordable financing, reflecting expectations that China can support Indonesia's energy transition through cost-effective investment. A small group (2%) selected other reasons. Overall, the responses show that both economic and technological considerations drive trust in China's role in clean energy development.



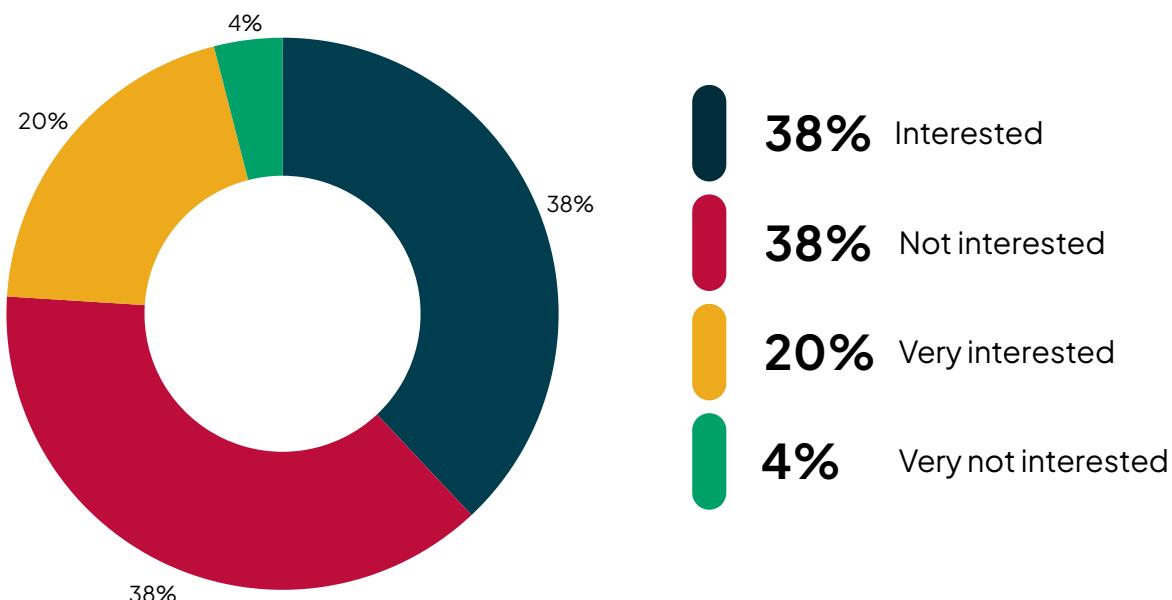
“**Most Indonesians are confident in China’s role in supporting Indonesia’s energy transition.**”

Photo source: Kompas.com

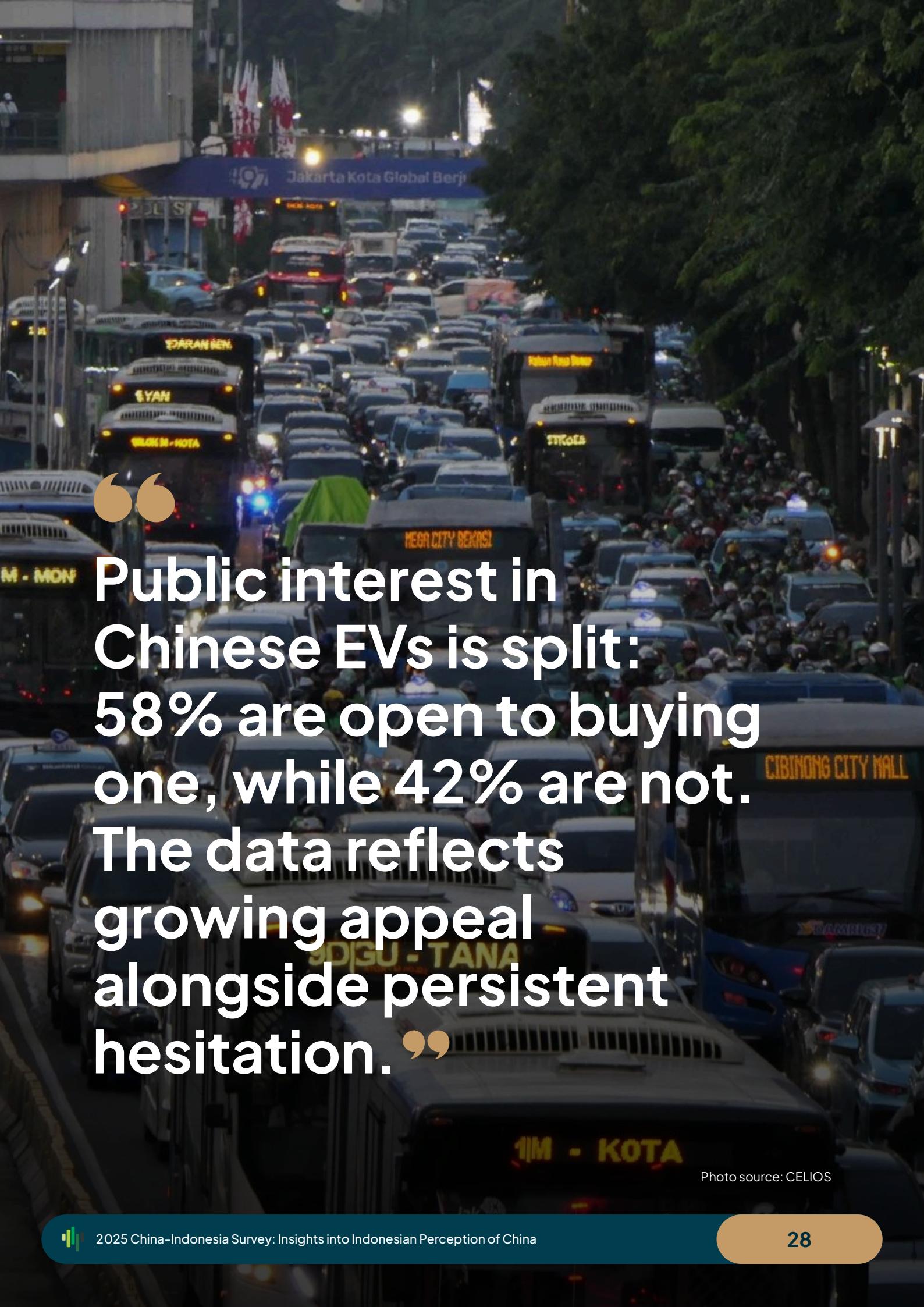


INTEREST IN PURCHASING A CHINESE-MADE ELECTRIC VEHICLE

Question: “If you had the financial ability, would you be interested in buying a Chinese-made electric vehicle?”



Responses are evenly split between interest and non-interest in purchasing a Chinese-made electric vehicle. On the positive side, 20% of respondents say they are very interested and 38% are interested, totaling 58% who express some level of willingness to consider a Chinese EV. On the other hand, 38% report they are not interested, and 4% are very not interested, forming a combined 42% who are reluctant or opposed to the idea. This balance suggests that while Chinese EVs are appealing to a majority, there remains a substantial proportion of respondents who are hesitant or unconvinced.



“

Public interest in Chinese EVs is split: 58% are open to buying one, while 42% are not. The data reflects growing appeal alongside persistent hesitation.”

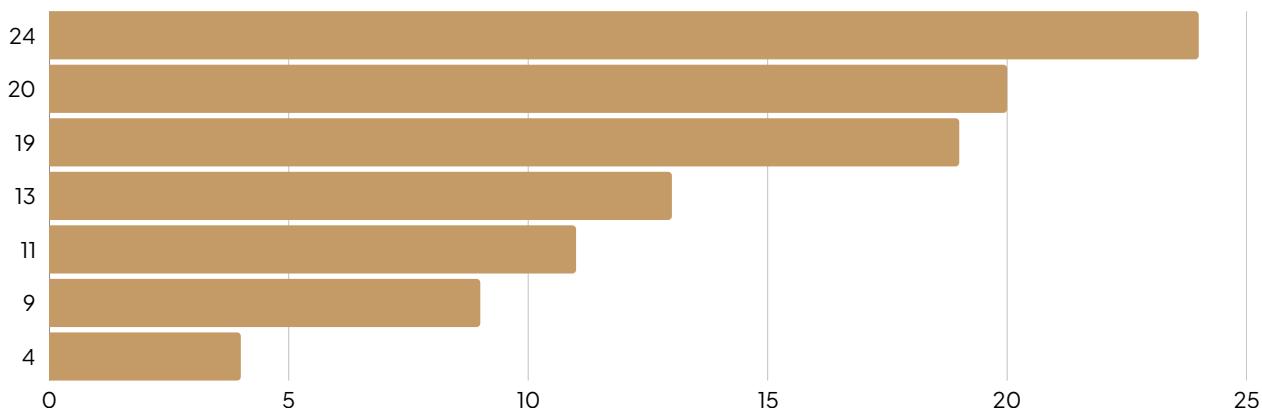
Photo source: CELIOS



12

REASONS FOR NOT BEING INTERESTED IN PURCHASING A CHINESE-MADE ELECTRIC VEHICLE

Question: "If you are not interested, please select up to three reasons."



24% Limited charging stations

20% Weak after-sales service

19% Doubts about quality/reliability

13% Safety concerns

11% Negative media coverage

9% Prefer other brands

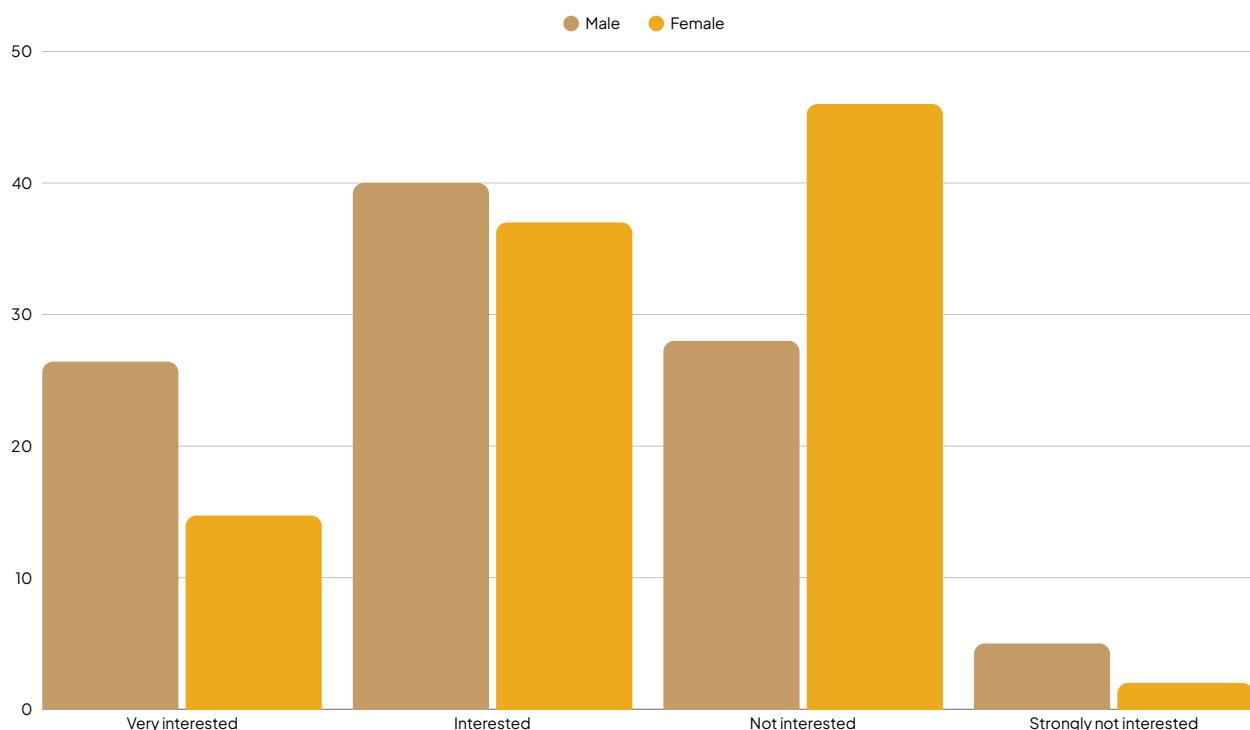
4% Other reasons

Among respondents who are not interested in buying a Chinese-made electric vehicle, the most commonly cited barrier is limited charging stations (24%), indicating that infrastructure remains a key obstacle to EV adoption generally. This is followed by concerns about after-sales service (20%) and doubts about quality or reliability (19%), reflecting reservations about long-term product performance and support.

Other important factors include safety concerns (13%), negative media coverage (11%), and a preference for other brands (9%), showing that perceptions and brand familiarity also play a role. A small portion (4%) cite other reasons. Overall, the findings suggest that infrastructure gaps, service-related issues, and perceptions of product reliability are the main drivers of reluctance toward Chinese EVs.



GENDER DIFFERENCES IN INTEREST IN PURCHASING A CHINESE-MADE ELECTRIC VEHICLE



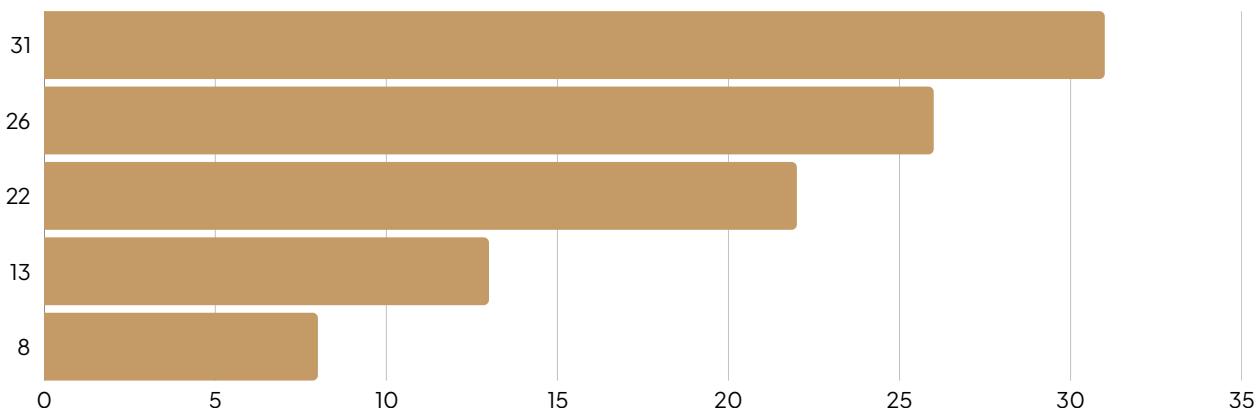
The crosstab between gender and interest in buying a Chinese-made electric vehicle shows noticeable differences between men and women. Nationally, interest is relatively balanced: 20% are very interested, 38% are interested, while 38% are not interested and 4% are strongly not interested.

Men express significantly higher enthusiasm than women. Among male respondents, 26.42% are very interested and 40.39% are interested, with only 28.17% not interested and 5.02% strongly not interested. In contrast, women show lower enthusiasm and higher hesitation: only 14.72% are very interested and 36.7% interested, whereas 46.28% report being not interested, and 2.3% are strongly not interested.

Overall, men are more open to purchasing a Chinese-made electric vehicle, while women tend to be more skeptical, with a noticeably higher share expressing disinterest.

PREFERRED COUNTRY FOR OVERSEAS STUDY

Question: "If you or your child had the opportunity to study abroad, which country would be your first choice?"



31% China

26% Australia

22% United Kingdom & European Union

13% United States

8% Others

China stands as the top preferred destination for overseas study, chosen by 31% of respondents. Australia follows at 26%, demonstrating strong appeal as a study destination. Meanwhile, 22% of respondents select the United Kingdom (UK) & European Union (EU), showing continued interest in European education pathways. The U.S is preferred by 13%, and 8% choose other countries. These results suggest that while Western destinations maintain significant appeal, China has become the most favored option, and Australia remains a highly competitive and attractive choice for Indonesian students.

“

China stands as the top preferred destination for overseas study among respondents.”



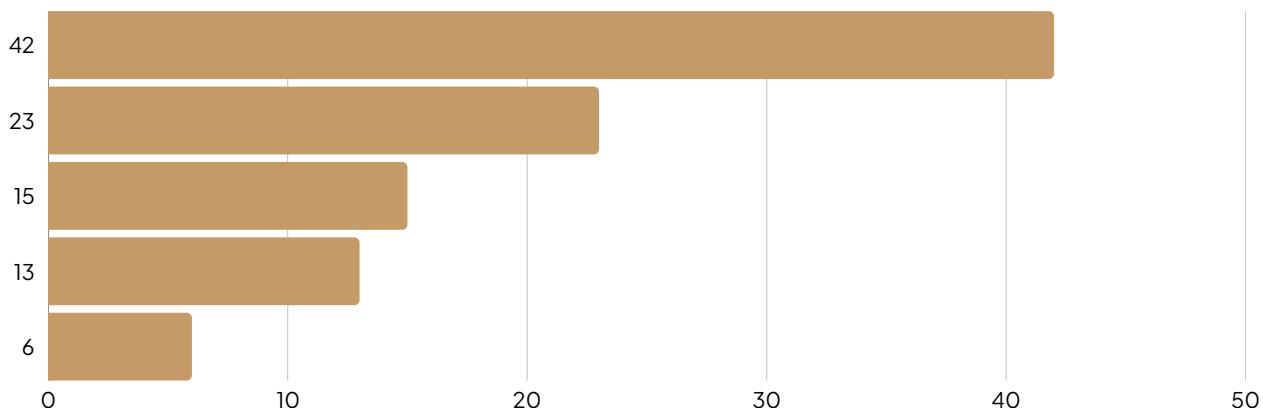
Photo source: ECNS.CN



2025 China-Indonesia Survey: Insights into Indonesian Perception of China

REASONS FOR CHOOSING CHINA AS A PREFERRED OVERSEAS STUDY DESTINATION

Question: “What is the main reason for choosing China as a study destination?”



42% Many scholarship opportunities

23% Affordable tuition and living costs

15% High-quality universities

13% Culturally closer

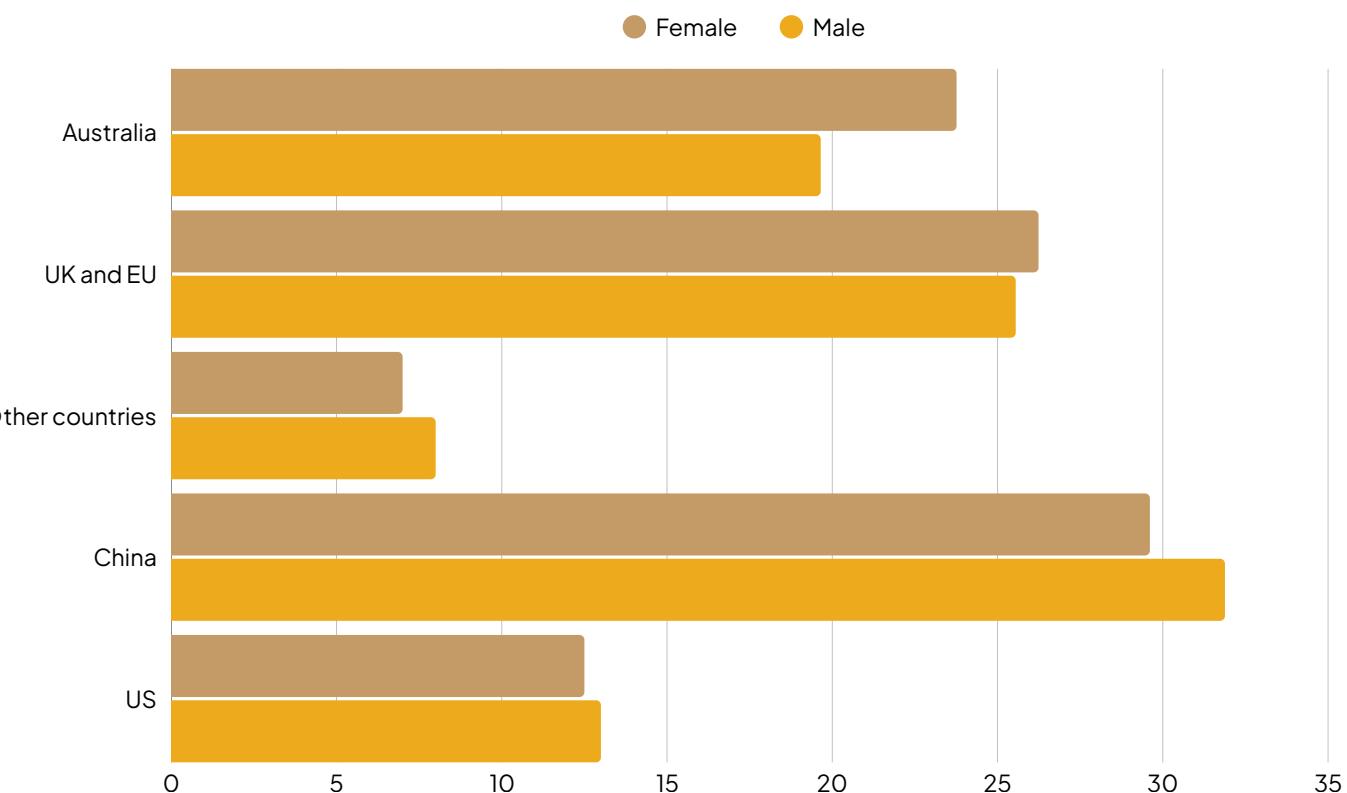
6% Others

Scholarship availability (42%) is the most frequently cited reason for choosing China as a study destination, underscoring the strong appeal of China's extensive financial aid and government-sponsored programs. Affordability is also a major draw, with 23% highlighting China's comparatively lower tuition fees and living expenses.

A further 15% point to the reputation and quality of Chinese universities, indicating that academic standards contribute significantly to China's attractiveness. Cultural proximity influences 13% of respondents, suggesting that shared regional characteristics and a familiar environment help ease the adjustment to studying abroad. Only 6% select China for other personal or situational reasons.

Overall, China's appeal is driven primarily by financial accessibility—through both scholarships and cost advantages—while academic quality and cultural familiarity reinforce its position as a preferred destination for Indonesian students.

GENDER DIFFERENCES IN STUDY ABROAD PREFERENCES



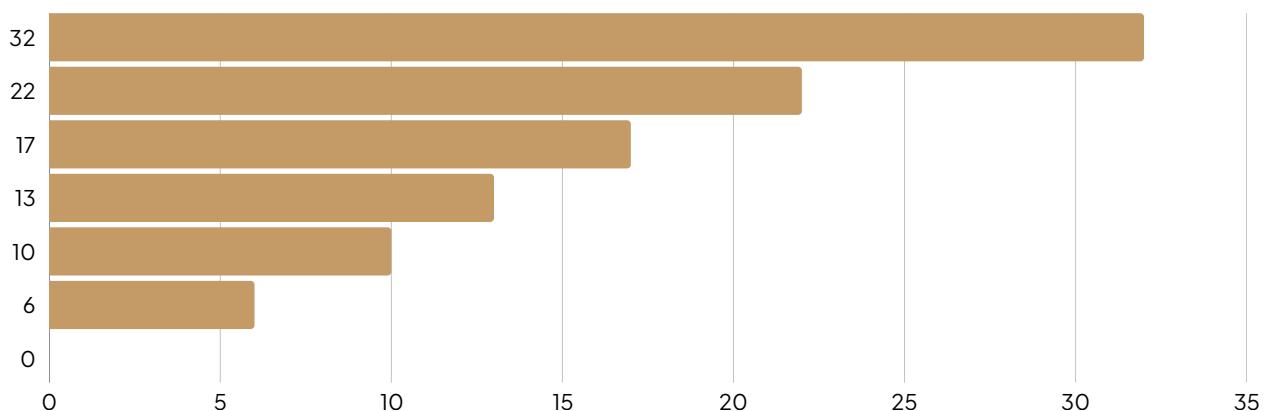
The crosstab between gender and preferred study-abroad destinations shows that both men and women share similar patterns when choosing where they or their children would study if given the opportunity. Nationally, China (31%) emerges as the most preferred destination, followed by the UK and EU (26%), Australia (22%), the United States (13%), and other countries (8%).

Among men, 31.88% choose China, slightly higher than women at 29.61%, indicating a modest gender gap in favor of China among male respondents. Preferences for the UK and EU are nearly identical between men (25.55%) and women (26.24%), suggesting broad appeal across genders. Australia is more favored by women (23.76%) compared to men (19.65%), while interest in the United States is almost the same for both groups (around 13%).

Overall, the data suggests that gender does not create stark differences in study-abroad preferences, though men lean slightly more toward China, while women are somewhat more inclined to choose Australia.

PREFERRED PRIMARY PARTNER FOR INDONESIA

Question: “If Indonesia had to choose a primary partner, which country or region would you prefer?”



32% China

22% Other Western countries (Europe, United Kingdom, Australia, etc.)

17% ASEAN neighbors

13% Middle Eastern countries

10% Non-aligned

6% United States

0% Latin American countries

China emerges as the most preferred primary partner for Indonesia, selected by 32% of respondents. This is followed by other Western countries (22%) and Association of Southeast Asian Nations (ASEAN) neighbors (17%), indicating that both Western partnerships and regional cooperation remain important alternatives in the public view. Meanwhile, 13% prefer Middle Eastern countries, and 10% favor a non-aligned approach, reflecting a segment of respondents who support neutrality or diversified partnerships. Support for the United States is relatively low at 6%, and 0% choose Latin American countries as Indonesia's main partner. Overall, the results show strong support for China as Indonesia's top partner, while also revealing meaningful interest in Western and regional options.



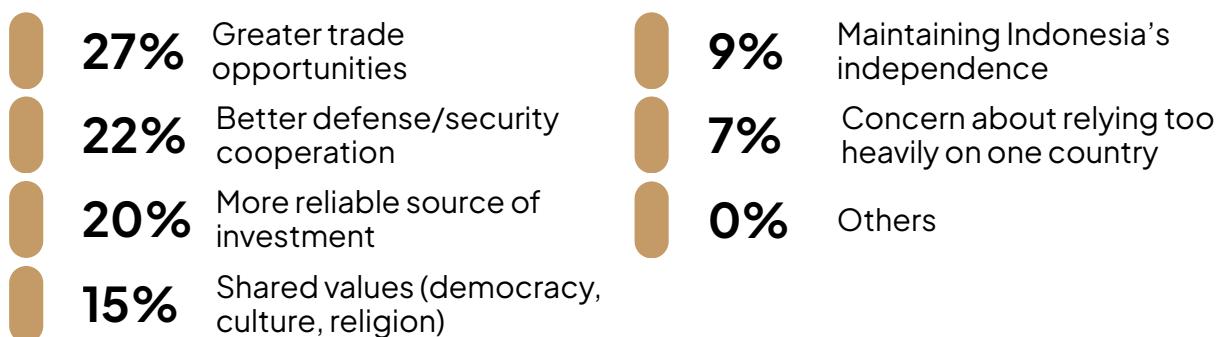
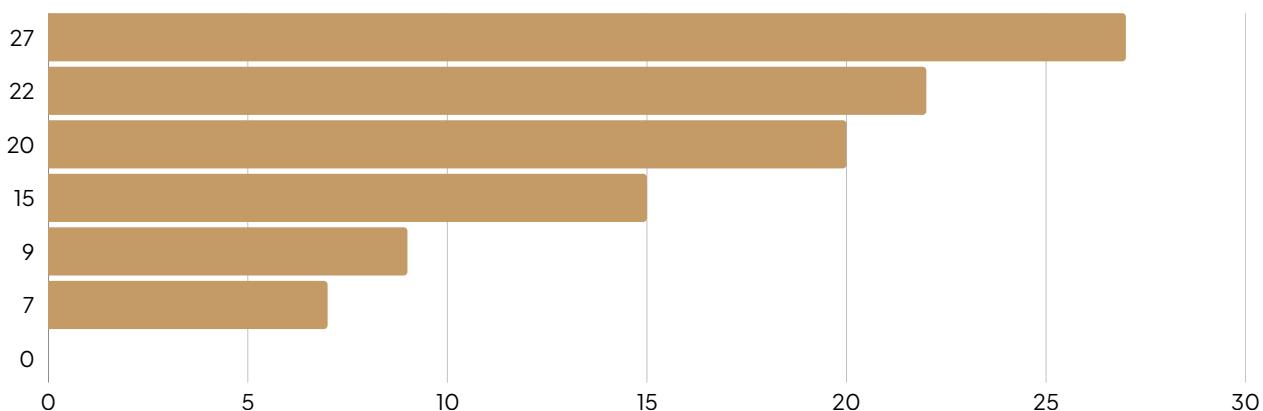
“**China emerges as the most preferred primary partner for Indonesia.**”

Photo source: Ministry of State Secretariat of the Republic of Indonesia



REASONS FOR CHOOSING A PREFERRED PRIMARY PARTNER

Question: “Please select up to three reasons for your choice of Indonesia’s primary partner.”

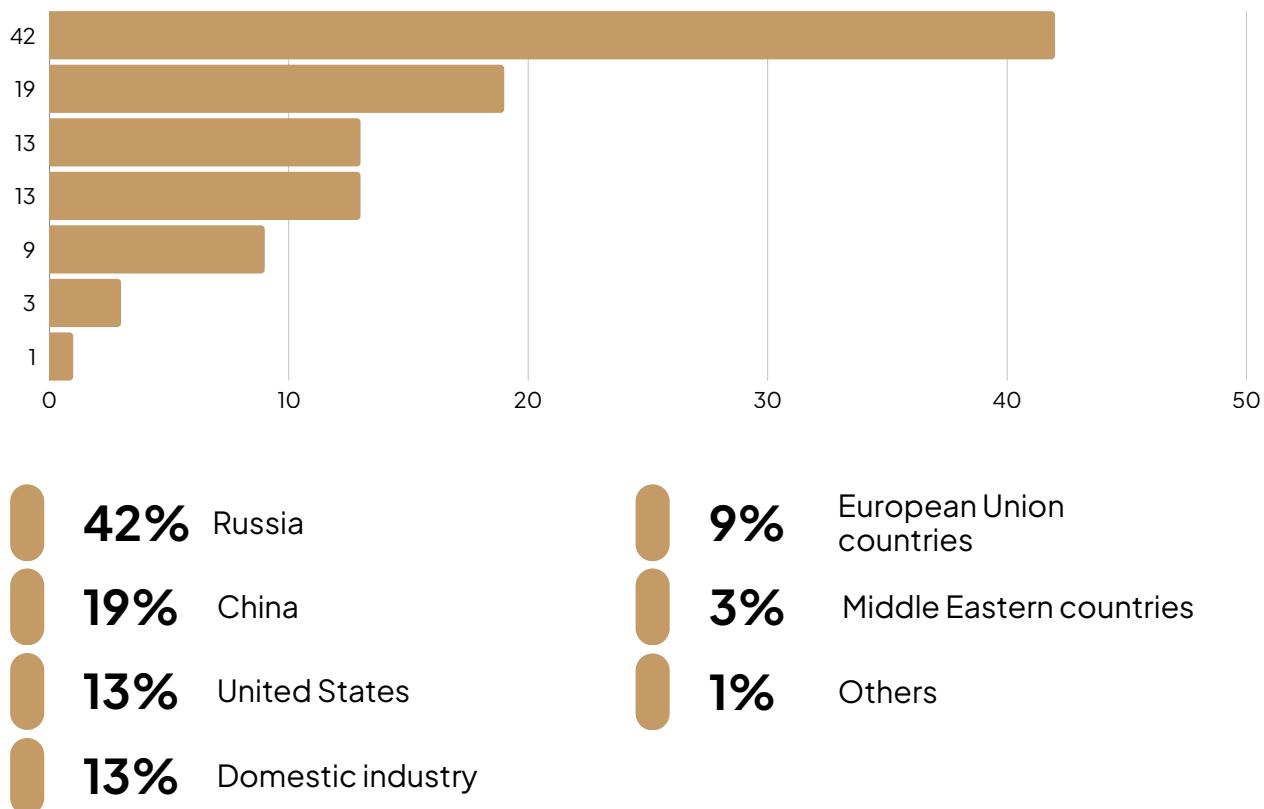


Respondents highlight greater trade opportunities (27%) as the most common reason for selecting a preferred primary partner, suggesting that economic considerations play a central role in shaping foreign policy preferences. This is followed by expectations of better defense and security cooperation (22%), showing that strategic and security interests are also influential.

A notable share of respondents value reliable investment sources (20%), while 15% emphasize shared values, including democracy, culture, or religion. Smaller groups cite concerns about overdependence on a single country (7%) or stress the importance of maintaining Indonesia's independence (9%). Overall, the results indicate that economic and security factors dominate public reasoning, with values and sovereignty considerations also contributing to respondents' choices.

PREFERRED SOURCE FOR INDONESIA'S DEFENSE AND MILITARY EQUIPMENT

Question: "Indonesia plans to purchase defense/military equipment. From which country or region should it be sourced?"



Russia is the most preferred source of defense and military equipment, chosen by 42% of respondents—significantly higher than any other option. This indicates strong public confidence in Russian military technology and long-standing defense ties. China ranks second at 19%, followed by the United States (13%) and domestic industry (13%), showing a mix of interest in foreign suppliers and support for developing Indonesia's own defense sector. Meanwhile, 9% prefer equipment from European Union countries, and 3% choose Middle Eastern countries, with 1% selecting other options. Overall, the results reflect diverse preferences but a clear leading choice in Russia, alongside notable consideration for China, Western suppliers, and domestic production.



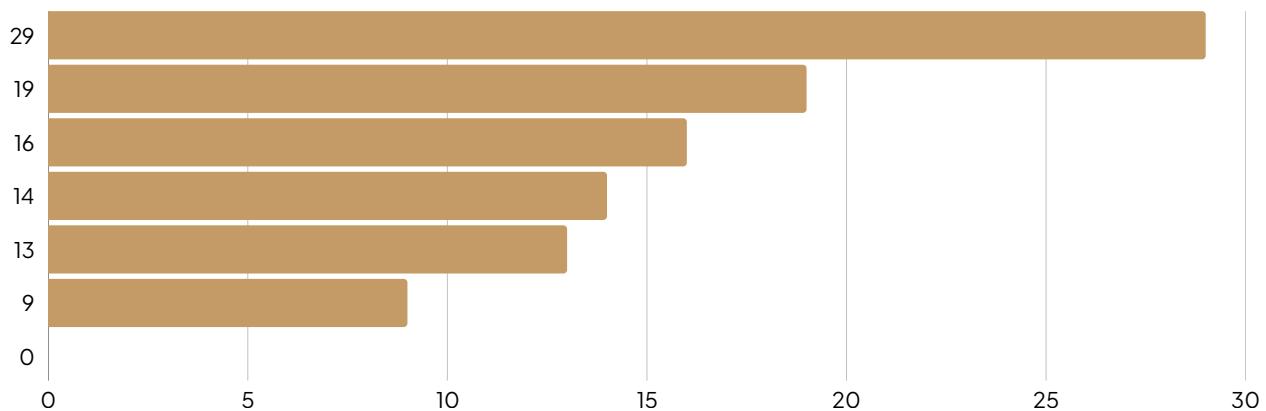
“
Russia stands out as Indonesia’s top choice for sourcing defense and military equipment. ”

Photo source: Maklumat.id



REASONS FOR CHOOSING A PREFERRED SOURCE OF MILITARY EQUIPMENT

Question: “Please select up to three reasons for your choice of where Indonesia should source its defense/military equipment.”



29% Superior technology

13% Political alignment

19% More trustworthy partner

9% Supporting local industry

16% Maintaining independence from major powers

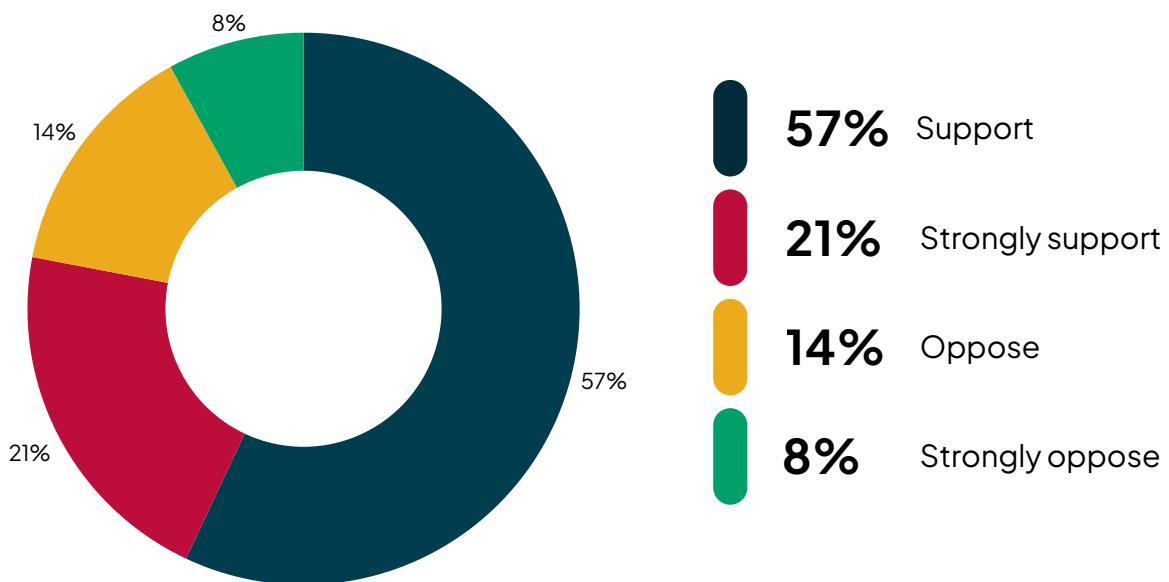
0% Others

14% More cost-effective

The most frequently mentioned reason is superior technology (29%), indicating that respondents place strong emphasis on advanced capabilities and performance when considering military suppliers. This is followed by trust in the partner (19%), suggesting that reliability and long-term cooperation are also key considerations. Other reasons include cost-effectiveness (14%), political alignment (13%), and the desire to support local industry (9%). Additionally, 16% highlight the importance of maintaining Indonesia's independence from major powers, signaling a preference for strategic autonomy. Overall, the responses show that technology, trust, and strategic independence are the primary factors shaping supplier preferences.

SUPPORT FOR EXTENDING THE HIGH-SPEED RAIL TO JAKARTA—SURABAYA WITH CHINA'S INVOLVEMENT

Question: “Do you support extending the Jakarta–Bandung high-speed rail to Jakarta–Surabaya with China’s involvement?”



A large majority of respondents support extending the high-speed rail project from Jakarta–Bandung to Jakarta–Surabaya with China’s involvement. A combined 78% either strongly support (21%) or support (57%) the proposal, indicating broad public approval for expanding the project. Opposition exists but is relatively limited: 14% oppose and 8% strongly oppose, totaling 22% who are against the extension. Overall, the findings show strong public endorsement of continuing the high-speed rail collaboration with China.

“

A large majority of respondents support extending the Jakarta–Bandung high-speed rail to Jakarta–Surabaya with China’s involvement. ”



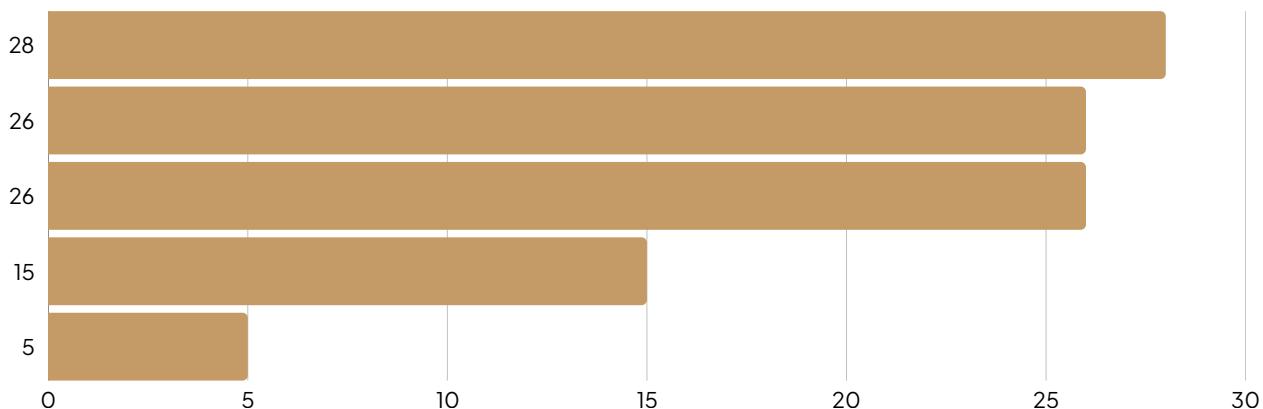
Photo source: Berita Nasional



2025 China-Indonesia Survey: Insights into Indonesian Perception of China

REASONS FOR SUPPORTING THE EXTENSION OF THE HIGH-SPEED RAIL TO JAKARTA—SURABAYA WITH CHINA'S INVOLVEMENT

Question: “If you support the extension, please select up to three reasons.”



28% Transportation modernization

26% Improved connectivity

26% Economic growth

15% More affordable financing

5% Others

Among respondents who support extending the high-speed rail line to Jakarta–Surabaya with China's involvement, the most frequently cited reason is transportation modernization (28%), reflecting strong public interest in upgrading Indonesia's transport infrastructure through international cooperation. This is followed closely by improved connectivity (26%) and economic growth (26%), suggesting that many supporters view China's participation as contributing to both enhanced regional integration and broader economic development. Additionally, 15% of respondents point to more affordable financing as a key reason for their support, indicating recognition of China's role in providing cost-effective funding and project implementation. A further 5% select other considerations. Overall, the findings suggest that support for the extension with China's involvement is driven primarily by expectations of infrastructure modernization, better connectivity, and positive economic impacts, alongside perceived financial advantages associated with the partnership.

RESPONDENT PROFILES



BY PROVINCE

The survey gathered responses from 1,022 participants across all major regions of Indonesia, providing broad geographic representation. The sample is heavily concentrated in the populous provinces of Java, which collectively account for the majority of respondents. West Java represents the largest share with 27.01%, followed by Central Java (16.05%), Jakarta (15.95%), and East Java (13.11%). Together, these provinces comprise over 72% of the total sample, reflecting their dominant share of the national population and digital survey reach.

Other provinces with notable representation include Banten (3.91%), South Sumatra (3.42%), Yogyakarta (4.11%), and North Sumatra (2.54%). Provinces outside Java generally contribute smaller proportions, typically below 2%. Regions with less than 1% representation include Lampung, Riau, Bali, South Sulawesi, Kalimantan Timur, and several eastern provinces. A small number of provinces—such as North Kalimantan, Maluku, North Maluku, Papua Barat, Papua Tengah, and Southeast Sulawesi—have minimal representation (around 0.1% each).

Overall, while the sample is nationally distributed, it is strongly centered in Java, consistent with population density and the survey's online distribution channels. This composition should be taken into account when interpreting national-level findings.

BY EMPLOYMENT STATUS

The survey sample reflects a broad mix of employment backgrounds. The largest portion of respondents work in the informal sector, representing 44.13% of the total sample. This is followed closely by those employed in the formal sector, who make up 42.27%. Together, these two groups account for the vast majority of participants, indicating strong representation from both formal and informal economic segments.

Respondents who are not currently employed constitute 13.6% of the sample. This category includes students, homemakers, job seekers, and others outside the workforce. Overall, the distribution shows that the survey captures perspectives across different types of employment, with a slight predominance of informal sector workers.



BY GENDER

The survey sample includes a slightly higher proportion of female respondents. Women make up 55.19% of the total participants, while men represent 44.81%. This near-balanced distribution ensures that perspectives from both genders are well represented in the findings. With more than half of the respondents being female, the dataset reflects a modest female majority within the survey's reach.

BY EDUCATION LEVEL

The educational background of respondents is dominated by those with secondary education, with 48.04% holding a Senior High School (SMA)/Vocational High School (SMK) qualification. A substantial portion of the sample also holds university degrees, with 38.06% having completed a bachelor's degree and 11.25% holding a diploma.

Respondents with lower levels of education make up a small share of the sample: 2.15% have completed Junior High School (SMP), and less than 1% (0.49%) have only elementary education or have not completed elementary school. Overall, the sample is relatively well educated, with the majority having at least secondary schooling and a significant share possessing higher education qualifications.



Photo source: CELIOS



CONCLUSION

CONCLUSION

The 2025 China-Indonesia Survey provides a comprehensive snapshot of Indonesian views on international engagement, particularly with China, in the context of ongoing global and regional shifts. The findings illustrate that Indonesians recognize the economic, technological, and educational dimensions of bilateral cooperation, while remaining mindful of strategic, political, and sovereignty considerations.

Respondents generally view President Prabowo's engagement with China and Indonesia's participation in BRICS positively, noting potential benefits such as enhanced diplomatic influence, access to new markets, and support for infrastructure and renewable energy projects. At the same time, respondents express a cautious approach, emphasizing the importance of maintaining autonomy, ensuring diversified partnerships, and balancing relations with other global actors, including Russia, Western countries, and ASEAN neighbors. Public opinion also reflects practical engagement priorities. Support for renewable energy initiatives, high-speed rail expansion, and consideration of Chinese-made electric vehicles indicates openness to technological and economic collaboration. However, Indonesians underscore the need for reliable infrastructure, quality services, and long-term strategic stability in any partnership.

Overall, the survey highlights a nuanced and measured perspective: Indonesians acknowledge potential opportunities from engagement with China and other international partners, but they also prioritize balanced foreign policy, national sovereignty, and diversified alliances. These insights can guide policymakers in shaping Indonesia's international strategy, ensuring that economic, technological, and strategic cooperation proceeds in a way that aligns with national interests, supports sustainable development, and maintains flexibility amid shifting regional and global dynamics.



AUTHORS



Muhammad Zulfikar Rakhmat is the Director of the China-Indonesia Desk at CELIOS. Zulfikar also holds affiliated positions at the Middle East Institute at the National University of Singapore, the London School of Economics' IDEAS, and Busan University of Foreign Studies. His areas of expertise lie in the political economy of international cooperation, with a particular emphasis on China-Indonesia relations, China-Middle East relations, and Indonesia-Middle East relations.



Bhima Yudhistira Adhinegara is the Executive Director of CELIOS. Bhima received British Academy Awards grants for Just Energy Transition in 2024-2025. Previously, Bhima had a career as an economist and expert staff at Indonesia Chamber of Commerce and was a consultant at the International Finance Corporation (IFC) World Bank, Jakarta. Bhima studied for a masters in the University of Bradford, UK. His research area includes macroeconomics, energy transition, and critical minerals governance.



Yeta Purnama is a researcher at CELIOS, focusing on the evolving dynamics of China-Indonesia relations. Her analyses have appeared in The Diplomat, Stratsea, Australian Outlook, and major Indonesian media outlets. Yeta holds a bachelor's degree in International Relations from Universitas Islam Indonesia.



CELIOS

**Center of Economic and Law Studies
(CELIOS)**
Jl. Banyumas, Menteng, Jakarta Pusat, Indonesia

E : admin@celios.co.id
W : celios.co.id