

ASEAN KEY FIGURES 2018



one vision
one identity
one community



ASEAN Key Figures 2018

The ASEAN Secretariat
Jakarta

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The ASEAN Secretariat is based in Jakarta, Indonesia.

For inquiries, contact:

The ASEAN Secretariat

Community Relations Division (CRD)

70A Jalan Sisingamangaraja

Jakarta 12110

Indonesia

Phone: (62 21) 724-3372, 726-2991

Fax: (62 21) 739-8234, 724-3504

E-mail: public@asean.org

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FOREWORD

The ***ASEAN Key Figures 2018*** is the inaugural issue of a new publication by the Statistics Division (ASEANstats) of the ASEAN Secretariat. The publication provides readers with selected statistical indicators on ASEAN Member States that are presented in a reader-friendly format, using distinctive charts, and complemented with brief description on the definitions and observed patterns of the indicators. It contributes to the effort of making statistics accessible and informative to the general public.

Drawing mainly from the ASEANstats current databases, the publication highlights the patterns and developments in ASEAN demography as well as socio-economic landscape. Readers can find this publication and its associated statistical data online at the ASEANStats website (www.aseanstats.org).

The statistics currently available in the ASEANstats databases are mainly submitted by the national statistical offices of ASEAN Member States under the purview of the ASEAN Community Statistical System (ACSS) Committee. To this end, I would like to express my appreciation to the ASEAN Member States for their continued commitment to ASEAN statistical cooperation.

I hope you find information in this publication useful.



DATU LIM JOCK HOI
Secretary-General of ASEAN

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INTRODUCTION

The ***ASEAN Key Figures 2018*** is the inaugural issue of the new publication by the Statistics Division of the ASEAN Secretariat (ASEANstats). The publication originates from ASEANstats' two previous publications: the- ***ASEAN Economic Community Chartbook*** and ***ASEAN Community in Figures (ACIF)***, both of which were discontinued in 2017.

The new publication aims to provide statistical updates on ASEAN economic and social progress across multiple dimensions. It uses charts, with brief and easily understood narrative on the meanings of the indicators, trends and some patterns. This new publication is part of ongoing efforts by ASEANstats to further promote the visibility of ASEAN regional statistical cooperation while contributing towards the monitoring of economic and social progress in ASEAN.

The ***ASEAN Key Figures 2018*** is organised into 9 chapters, which is started with the introduction on the publication, followed by specific topics on population, education, health, poverty, inequality and human development, labour, economy, international trade in goods and services, foreign direct investment, transport, tourism and communication.

The data¹ presented in this publication are mainly based on the ASEAN Member States (AMS) submitted data, and is accessible from the ASEANstats website at the following link: <https://www.aseanstats.org/>

1 Some data in this publication are estimated by ASEANstats. Unless otherwise is stated, these estimated figures are in no way considered as the official statistics, and are used only to provide indicative information.

1 POPULATION

Introduction

ASEAN population has almost doubled over the last four decades – reaching 642.1 million in 2017. Population increase in ASEAN was mainly due to natural increases and membership expansions, the latter notably during 1984-1999.

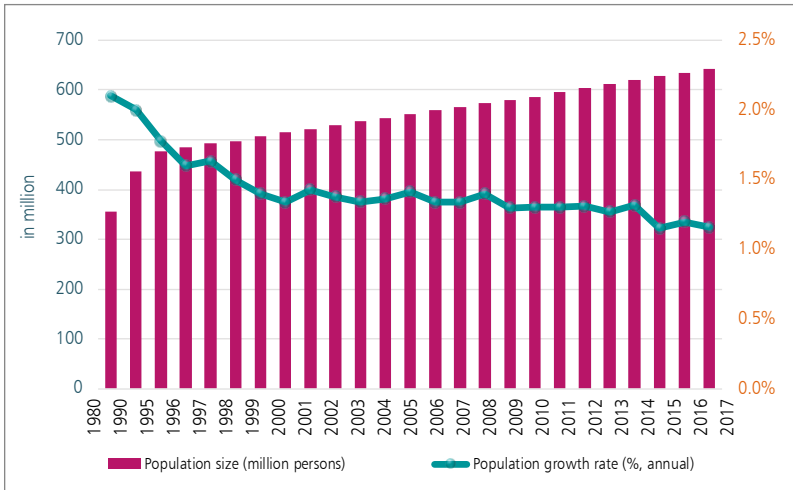
Observed changes in population age structures indicate that ASEAN is experiencing demographic transition as reflected in declining fertility and mortality levels during the last few decades. This demographic transition

leads to increases in the shares of youth and working-age population, albeit at different stages of transitions among ASEAN Member States (AMS).

Population: size and structure

Total number of population in 10 AMS reached 642.1 million in 2017. This population size has almost doubled from 355.2 million in 1980. The increase in ASEAN population was mainly due to natural increases and membership expansions; the latter with the accession of Brunei Darussalam in 1984, Viet Nam in 1995, Lao PDR and

Figure 1.1. Population size and growth rate, ASEAN total, 1980-2017



Source: ASEAN Secretariat, ASEANstats database.

Myanmar in 1997, and Cambodia in 1999.

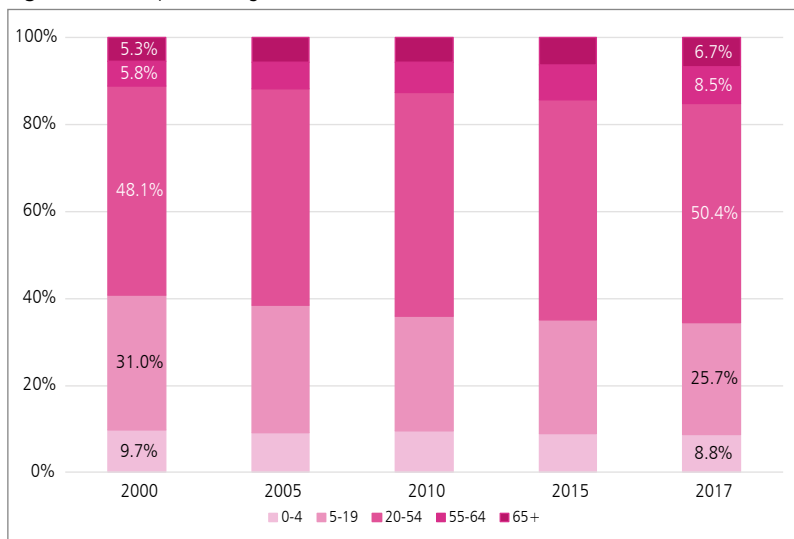
On average, ASEAN population grew around 7.5 million persons annually between 1980 and 2017. Figure 1.1 indicates that the annual population growth rate has been in a declining trend, from over 2% prior to 1992 to around 1.2% during the last five years.

ASEAN population is generally characterised by high proportion of youth and productive working-age population. The population below the age of 20 and within the age of 20-54 years accounted for 34.5% and 50.4% of the region's total population in 2017, respectively

(Figure 1.2). While the share of youth population has dropped from 40.7% in 2000 to 34.5% in 2017, the share of productive working-age population has increased from 48.1% to 50.4% during the same period. The share of population aged over 55 years also increased from 11.1% in 2000 to 15.2% in 2017.

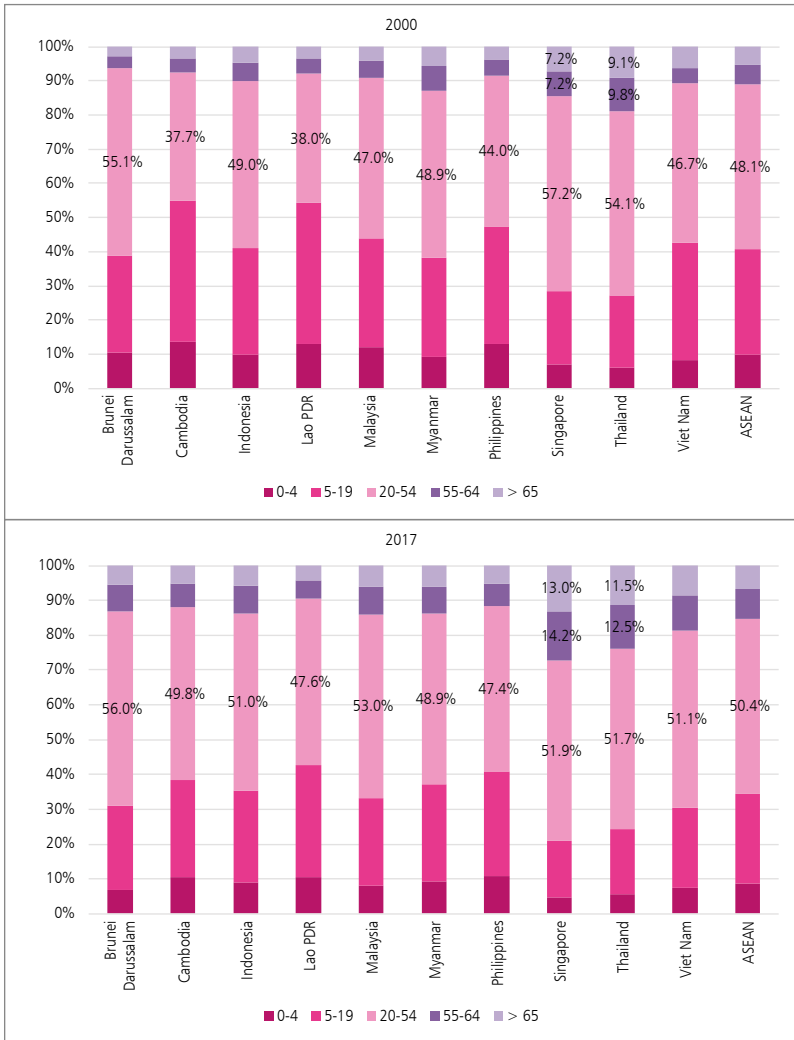
Changes in population age structure indicate the ongoing process of demographic transition, which is associated with declining fertility and mortality levels in AMS during the last few decades. However, the stages of the demographic transitions vary across the 10 AMS, reflecting the different levels of development.

Figure 1.2. Population age structure (% to total), ASEAN total, 2000-2017



Source: ASEAN Secretariat, ASEANstats database.

Figure 1.3. and 1.4. Population age structure (% to total), ASEAN Member States, 2000 and 2017.



Source: ASEAN Secretariat, ASEANstats database.

Figure 1.3 and 1.4 shows that Singapore and Thailand have already attained an older age structure and are experiencing declining proportions

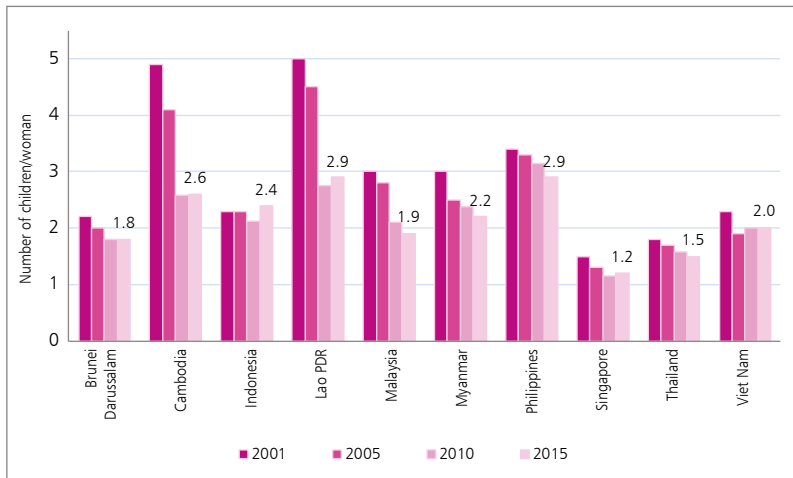
of youth and working-age population during 2000-2017. The shares of population aged over 55 years in Singapore and Thailand increased from 14.4% and 18.9% in 2000 to 27.2% and 24.0% in 2017 respectively.

During the same period, other AMS are experiencing a rise in the proportion of youth and working-age population, presenting them with the potential of demographic dividends. With the right strategy, this demographic dividend could bring about significant contributions to economic growth and poverty reduction. However, this demographic dividend can also present challenges in terms of providing education and creating employment opportunities.

Fertility

Total fertility rate (TFR), which indicates the average number of children born to women during their reproductive years, is one of the most important contributor to population growth. A TFR of 2.1 is considered as the replacement level, meaning that if, on average, every woman has 2.1 children and these children survive to the age of 15, these children would have replaced the mother and her partner upon death, keeping the population size constant. Therefore, when the TFR is greater than 2.1, the population will eventually increase, and when it is less than 2.1, the population will eventually decrease.

Figure 1.5. Total fertility rate, ASEAN Member States, 2001-2015



Source: ASEAN Secretariat, ASEANstats database.

Figure 1.5 shows that TFRs in all 10 AMS have been declining over time. TFRs in Singapore, Thailand, Brunei Darussalam, Malaysia and Viet Nam fell below the replacement level at less than 2 in 2015. Decline in TFRs were also recorded by Cambodia and Lao PDR at 2.6 and 2.9 in 2015, as compared to a TFR of almost 5 in 2001.

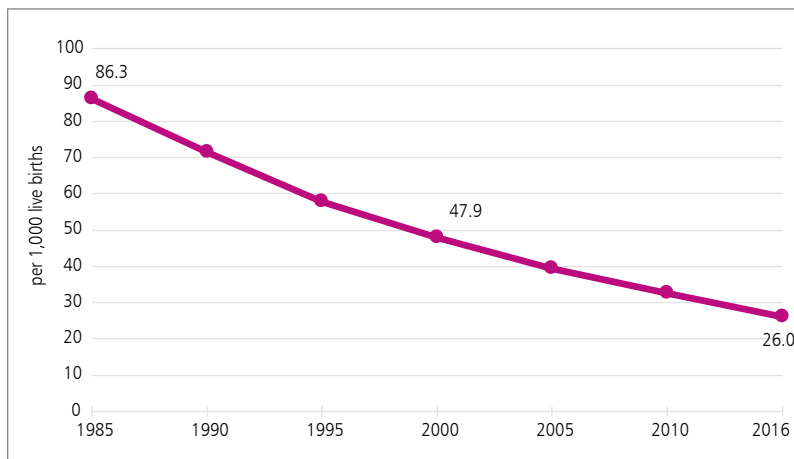
The declining fertility leads to fewer children relative to the working-age population. This provides the opportunity to avail more resources and increase investment in child and maternal health, education, and other supporting infrastructures. However, at the same time, sustained low fertility rates may signify an aging population,

bringing about more burden on the economy through increasing health care and social security costs.

Mortality and Life Expectancy

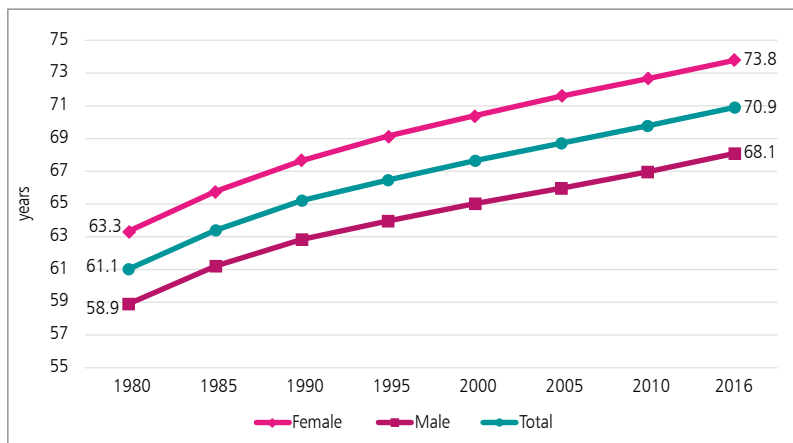
Mortality, along with fertility, is also an important contributing factor to population growth. One of the most widely used mortality indicators is under-five mortality rate, or child mortality rate. It measures the probability of a child dying between birth and five years of age, expressed per 1,000 live births. Child mortality rate can indicate the social, economic, and environmental health conditions in which the children live, including their access to health care. Thus, the indicators can be viewed

Figure 1.6. Under-five mortality rate (per 1,000 live births), ASEAN total, 1985-2016



Source: ASEAN Secretariat, ASEANstats database, "Celebrating ASEAN: 50 Years of Evolution and Progress: A Statistical Publication".

Figure 1.7. Life expectancy at birth (years), ASEAN total, 1980-2016



Source: ASEAN Secretariat, ASEANstats database, “*Celebrating ASEAN: 50 Years of Evolution and Progress: A Statistical Publication*”.

as a barometer of child well-being in general and child health in particular.

Figure 1.6 shows that under-five mortality rate in ASEAN as a total has experienced a sharp decline during the last three decades; from 86 deaths per 1,000 live births in 1985 to 26 deaths per 1,000 live births in 2016. This represents an average annual drop by 3.8%.

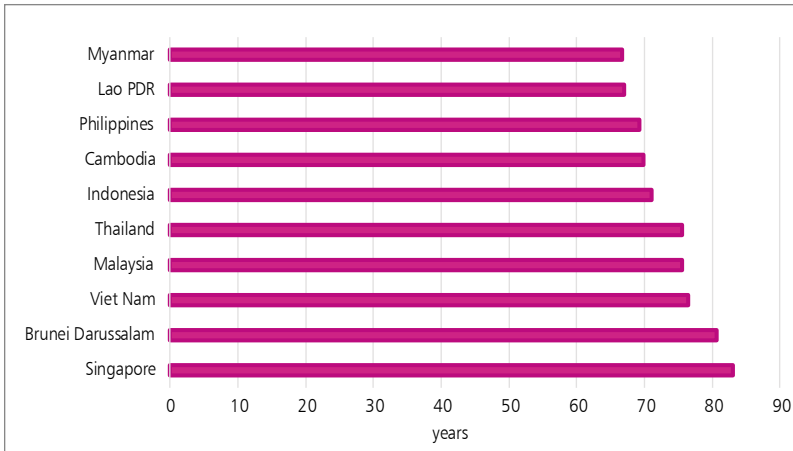
There is, however, disparity across AMS in their under-five mortality rates. According to “World Health Statistics 2018” (WHO, 2018), the available data on under-five mortality rates in AMS indicates a disparity, ranging from very low at 2.8 deaths per 1,000 live births in Singapore, moderate at 8.3 and 9.9 in Malaysia and Brunei

Darussalam, and high at 50.8 and 63.9 in Myanmar and Lao PDR. This diversity aligns with the different levels of development among AMS.

The decline in child mortality is very much associated with longer life expectancy. Life expectancy at birth is defined as the average number of years that a newborn could expect to live if he or she were to pass through life subject to the age-specific mortality rates of a given period. It simply measures the population longevity.

Overall, the average life expectancy in AMS has reached nearly 71 years in 2016, or an increase of around 10 years from 1980 (see Figure 1.7). Gender comparison indicates that at 74 years, the life expectancy of

Figure 1.8. Life expectancy at birth (years), ASEAN Member States, 2017



Source: ASEAN Secretariat, ASEANstats database.

females in all AMS was higher than males at 68 years in 2016.

A baby girl born in 2016 in ASEAN could expect to live, on average, until the age of 74 years, or 11 years longer than her counterpart born in 1980. Whereas a baby boy born in 2016 in ASEAN could expect to live, on average, to the age of 68 years, or 9 years longer than his counterpart born in 1980.

Disparity in life expectancy was also recorded among AMS. Figure 1.8 presents life expectancy in AMS, ranging from over 80 years in Singapore and Brunei Darussalam, between 70 and 80 in Viet Nam, Malaysia, Thailand, Indonesia and

Cambodia, to the lowest at below 70 in Pjilippines, Lao PDR and Myanmar.

This chapter has provided an understanding on ASEAN population dynamics, both as a total and by individual member states. All in all, ASEAN population has grown over the last four decades, mainly owing to natural increases and membership expansion. This population growth is followed by changes in population age structure – with more youth and working age population, and associated with the declines in mortality and fertility. The drops in under-five mortality rate is eventually bringing about longer life expectancy in all AMS.

2 EDUCATION

Introduction

Adult literacy rate, net enrollment rate, and percentage of educational spending to GDP are among various educational indicators that are important for monitoring the progress in the educational development of a particular country. During the last two decades, progressive improvement has been seen in these indicators across all AMS.

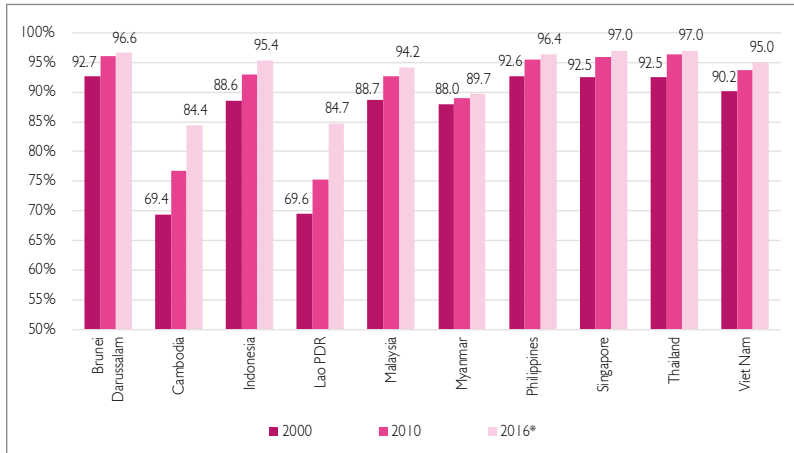
Adult literacy rate

Adult literacy rate is defined as the percentage of population aged 15 years and over who can both read

and write with understanding a short simple statement on his/her everyday life. Figure 2.1 shows that majority AMS have achieved relatively high adult literacy rate at 95% or above in 2015 or 2016 (the latest available data varied among AMS). While the rate in Cambodia and Lao PDR was relatively lower at 84.4% in 2016 and 84.7% in 2015 respectively, progress has been quite significant in both countries during the last fifteen years.

Gender disaggregation of adult literacy rate indicates that while male adult literacy rates was reported to be higher than female adult literacy rate

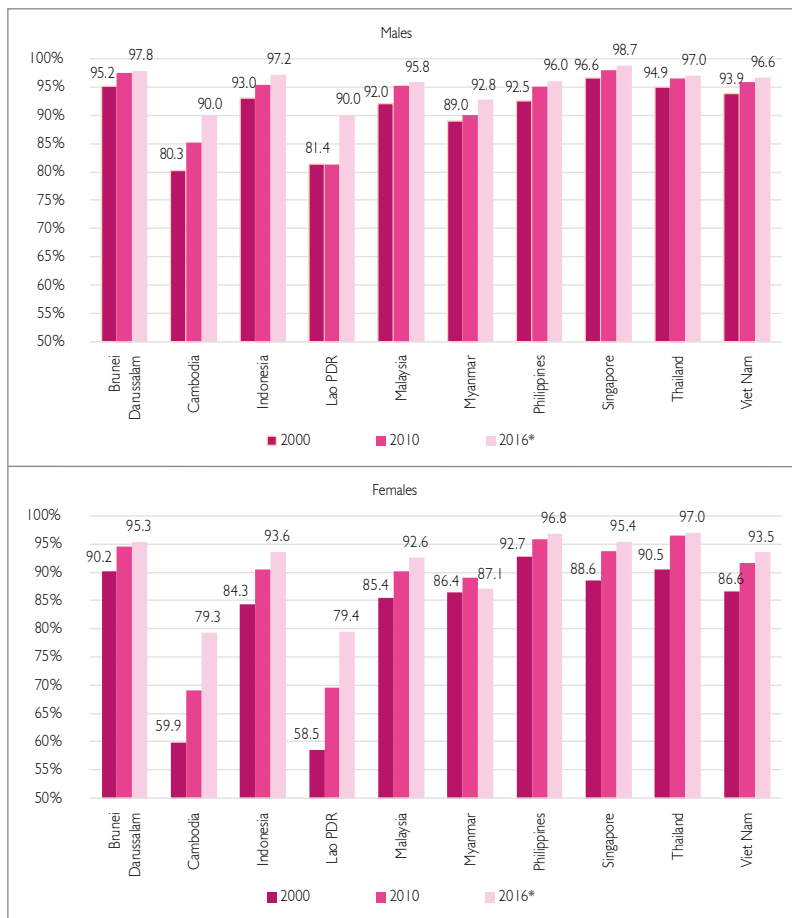
Figure 2.1. Adult literacy rate (%), ASEAN Member States, Total, 2000-2016



Source: ASEAN Secretariat, ASEANstats database.

Note: *For Lao PDR, Philippines and Thailand, the latest available data is 2015

Figure 2.2. and 2.3. Adult literacy rate (%), ASEAN Member States, Males and Females, 2000-2016



Source: ASEAN Secretariat, ASEANstats database.

Note: *For Lao PDR, Philippines and Thailand, the latest available data is 2015

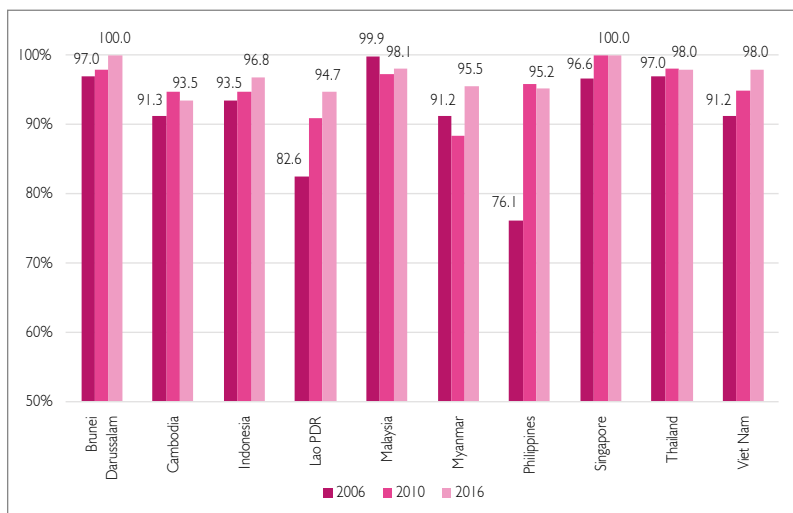
in all AMS, there have been significant improvements in female adult literacy rate, especially in Cambodia and Lao PDR between 2000 and 2015. (See Figure 2.2 and 2.3).

Net enrollment rate in primary and secondary education

Net enrollment rate in primary and secondary education is defined as the number of pupils (of any age) who are enrolled in primary and secondary education as a percentage of the total children of official school age population. Figure 2.4 shows that net enrollment rate in primary education have markedly improved between 2006 and 2016 in Brunei Darussalam, Malaysia, Singapore, Thailand, and Viet Nam with enrollment rate reaching 98% or above whereas

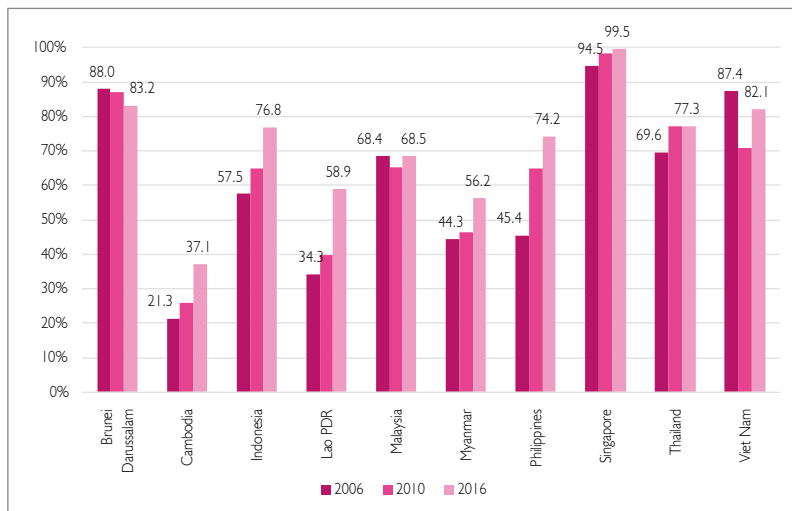
the rate in other AMS reached around 93%-97% in 2016. Likewise, net enrollment rate in secondary education has also improved during the same period, achieving 99.5% in Singapore followed by Brunei Darussalam (83.2%), Viet Nam (82.1%), Thailand (77.3%), Indonesia (76.8%), Philippines (74.2%), and Malaysia (68.5) (Figure 2.5). At the same time, lower rate was observed in Cambodia (37.1%), Lao PDR (58.9%) and Myanmar (56.2%), they still demonstrated considerable improvement over their corresponding rates during 2006 and 2016.

Figure 2.4. Net enrollment rate in primary education (%) by ASEAN Member States, 2006-2016



Source: ASEAN Secretariat, ASEANstats database.

Figure 2.5. Net enrollment rate in secondary education (%) by ASEAN Member States, 2006-2016



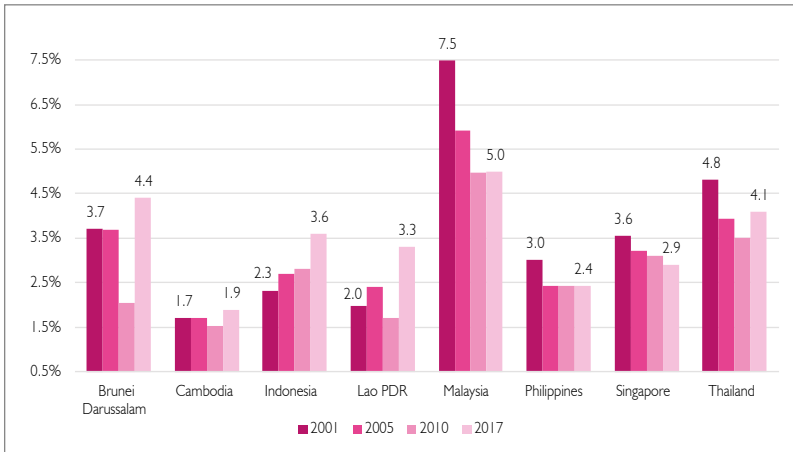
Source: ASEAN Secretariat, ASEANstats database.

Education expenditure to GDP

Expenditure on education is regarded as investment in human capital as it contributes towards skill formation which raises the ability to work and produce, thus contributing to economic growth. The share of education expenditure to total

GDP has been on the rise for some AMS between 2010 and 2017 (Figure 2.6). In 2017, the latest year of data availability, the figures varied across AMS with Malaysia, Brunei Darussalam and Thailand recording the top three rate at 5.0%, 4.4% and 4.1%, respectively.

Figure 2.6. Share of education expenditure to GDP (%) by ASEAN Member States, 2001-2017



Source: ASEAN Secretariat, ASEANstats database.

3 HEALTH

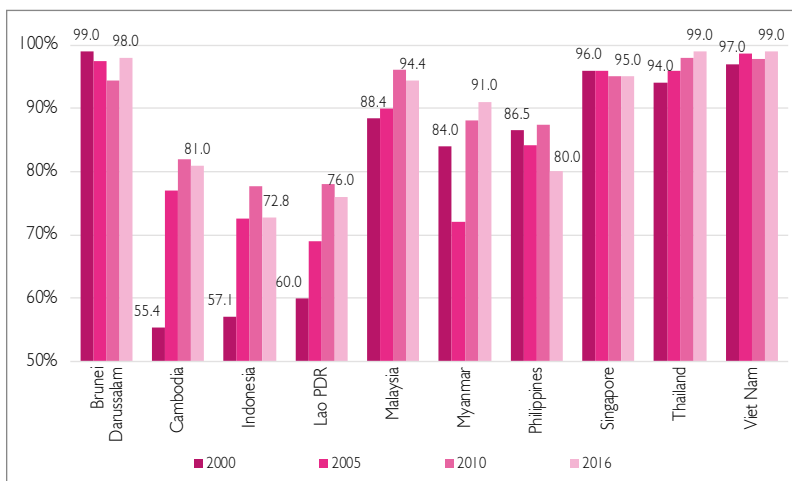
Introduction

The social progress of the AMS can be monitored among others using health related indicators, such as under five mortality rate and life expectancy at birth, which were reported earlier in Chapter 1. This chapter focuses on the indicators on provisions of public health facilities for better living conditions, namely the coverage of immunisation among one-year old children, access to safe drinking water and improved sanitation, and the share of health spending to GDP.

Coverage of immunisation among one-year old children

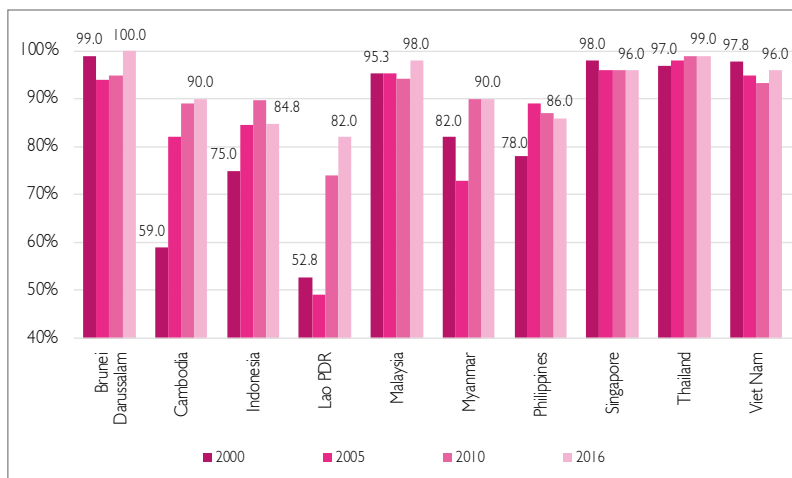
Immunisation is one of the most cost-effective public health interventions to reduce child mortality and morbidity associated with infectious diseases. The coverage of immunisation among one-year old children is defined as the proportion of one-year old children who were immunised to the total children aged one year. Figure 3.1 and 3.2 report on the coverage of immunisation against measles and diphtheria, pertussis and tetanus (DPT), respectively, between 2006 and 2016.

Figure 3.1. Coverage of immunisation against measles among one-year old children (%), ASEAN Member States, 2000-2016



Source: ASEAN Secretariat, ASEANstats database.

Figure 3.2. Coverage of immunisation against DPT among one year old children (%), ASEAN Member States, 2000-2016



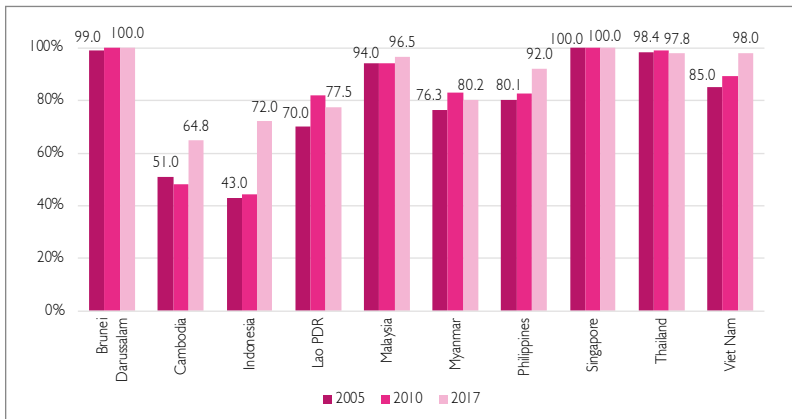
Source: ASEAN Secretariat, ASEANstats database.

Measles immunisation has consistently covered well over 90% of total children aged 1 year in Brunei Darussalam, Malaysia, Singapore, Thailand, and Viet Nam during the time period. Significant progress was recorded in other AMSs, from 55.4% in 2000 to 81.0% in 2016 in Cambodia, from 60.0% to 76.0% in Lao PDR, 57.1% to 72.8% in Indonesia, and 84.0% to 91.0% in Myanmar. Similar patterns are also observed in Figure 3.2 for DPT immunisation, with the highest coverage recorded in 2016 in Brunei Darussalam (100%), Malaysia (98.0%), Singapore (96.0%), Thailand (99.0%) and Viet Nam (96.0%).

Access to safe drinking water and improved sanitation

Access to safe drinking water and improved sanitation are key contributors to improved health status of the population. Figure 3.3 indicates that the whole population in Brunei Darussalam and Singapore have access to safe drinking water in 2017. Access to safe drinking water were also near universal in Viet Nam at 98.0%, Thailand at 97.8% and Malaysia at 96.5% in 2017. As for the other AMSs, significant improvement in the access to safe drinking water has been recorded over the period.

Figure 3.3. Population with access to safe drinking water (%), ASEAN Member States, 2005-2017

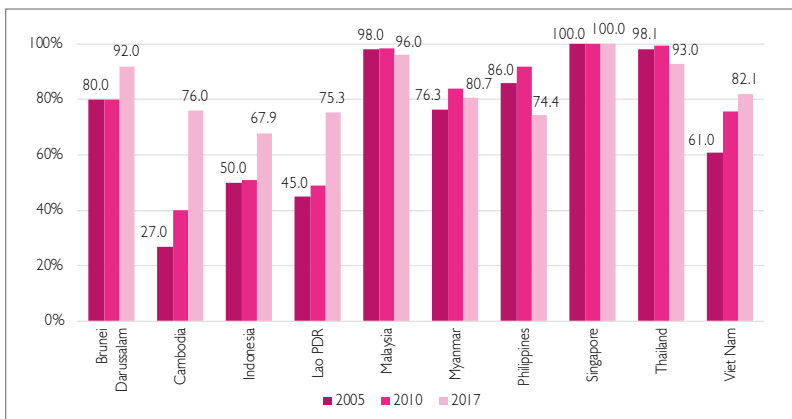


Source: ASEAN Secretariat, ASEANstats database.

Figure 3.4 shows that Singapore has full population coverage of access to improved sanitation at 100% in 2017. This is followed by Malaysia (96.0%), Thailand (93.0%), and Brunei

Darussalam (92.0%). As for the other AMS, with the exception of Philippines, access to improved sanitation showed steady progress during the period of 2005-2017.

Figure 3.4. Population with access to improved sanitation (%), ASEAN Member States, 2005-2017



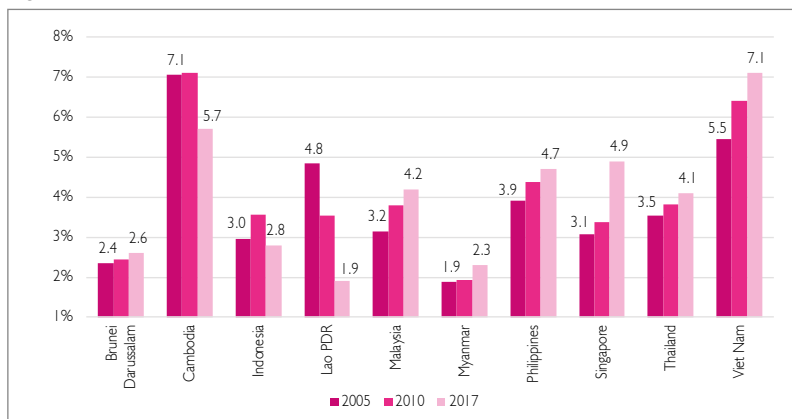
Source: ASEAN Secretariat, ASEANstats database.

Health expenditure to GDP

Health expenditure as a proportion to total GDP has continuously increased between 2005 and 2017 in most of AMS. The top four rate in 2017 was recorded by Viet Nam

at 7.1%, followed by Cambodia at 5.7%, Singapore at 4.9% and Philippines at 4.7%. Relatively lower rate was observed in Indonesia, Brunei Darussalam, Myanmar and Lao PDR at below 3% in 2017.

Figure 3.5. Health expenditure to GDP (%), ASEAN Member States, 2005-2017



Source: ASEAN Secretariat, ASEANstats database.

4 POVERTY, INEQUALITY, AND HUMAN DEVELOPMENT

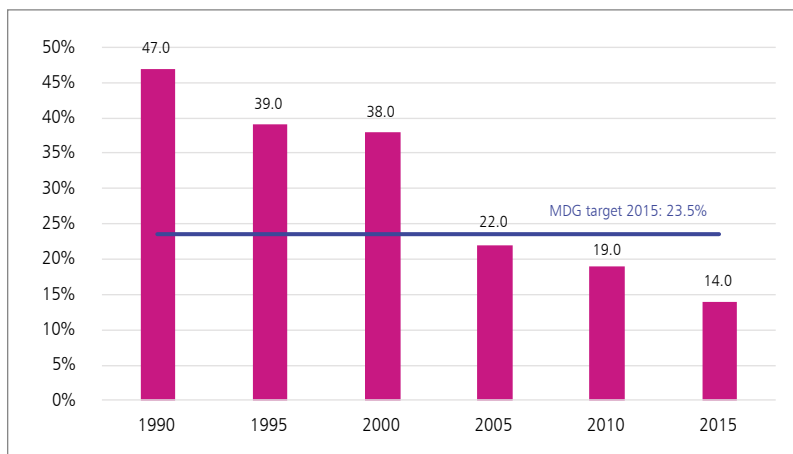
Introduction

Progress in the social wellbeing of ASEAN population can be monitored, among others, by examining the extent to which the AMS reduces the incidence of poverty as well as income inequality. This chapter highlights the trends in poverty rates, income inequalities, and human development in ASEAN.

Poverty incidence

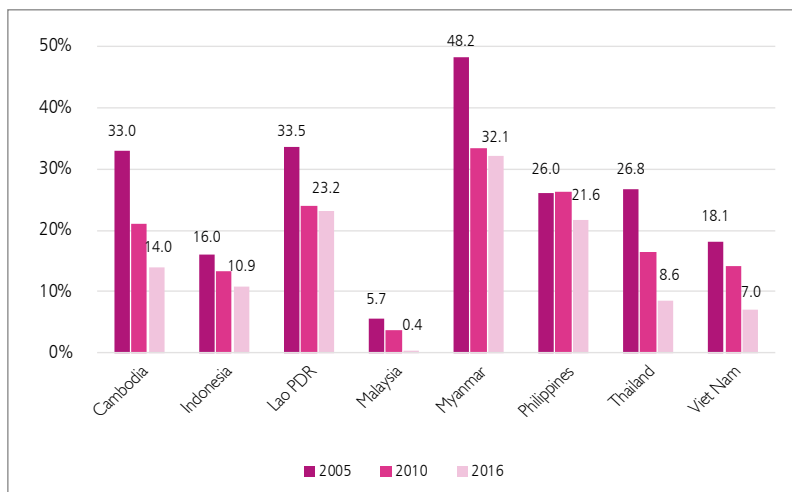
The proportion of ASEAN population living with less than \$1.25 PPP per day has consistently declined from 47% in 1990, 22% in 2005, to 14% in 2015 (see Figure 4.1), ASEAN has therefore gone beyond the Millennium Development Goals (MDG) target of poverty level for the region of 23.5%.

Figure 4.1. Population living with less than \$1.25 PPP per day (%), ASEAN total, 1990-2015



Source: ASEAN Secretariat (2017), "ASEAN Statistical Report on Millennium Development Goals 2017".

Figure 4.2. Population living below the national poverty lines (%), ASEAN Member States, 2005-2016



Source: ASEAN Secretariat, ASEANstats database.

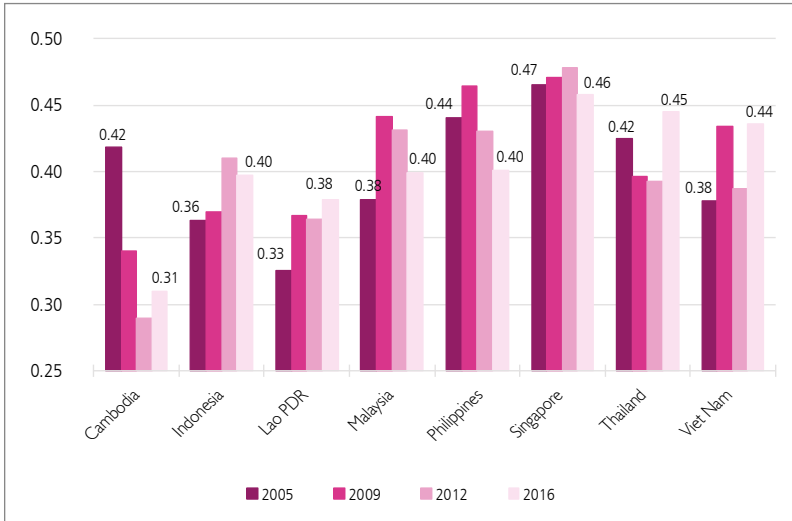
At the country level, the available data on the proportions of population living below the national poverty lines across AMS indicates that AMS in general experienced a decline in poverty incidence between 2005 and 2016, as shown in Figure 4.2. Large reduction in poverty levels was recorded by Thailand and Viet Nam, from 26.8% in 2005 to 8.6% in 2016 and from 18.1% to 7.0% over the same period, respectively. Significant poverty reduction was also demonstrated by Cambodia, where the rate has declined from 33.0% in 2005 to 14.0% in 2016.

Income inequality

Income inequality refers to the uneven distribution of income between individuals or households in a given country. One of the most frequently used measures of income inequality is Gini Coefficient (Ratio). The value of Gini Ratio spreads from 0, as a perfect equality, to 1, as a perfect inequality, in income distribution of the population.

Gini Ratios in most AMS range between 0.31 and 0.46 in 2016 (see Figure 4.3), and can be categorized as “medium inequality”. There have been increases in Gini Ratios in Indonesia, Lao PDR, Malaysia, Thailand and Viet Nam between 2005 and 2016,

Figure 4.3. Gini ratio, ASEAN Member States, 2005-2016



Source: ASEAN Secretariat, ASEANstats database.

indicating rise in income inequality. Meanwhile, a sharp decline in Gini Ratios was observed in Cambodia from 0.42 in 2005 to 0.31 in 2016.

Human Development Index

In addition to poverty and income inequality, Human Development Index (HDI) is another important indicator for measuring the social well-being of a country's population. HDI is a composite index focusing on the three basic dimensions of human development: 1) the ability to lead a long and healthy life as measured by life expectancy at birth; 2) the ability to acquire knowledge as measured by mean years of schooling and expected

years of schooling; 3) and the ability to achieve a decent standard of living as measured by gross national income per capita (UNDP 2018).

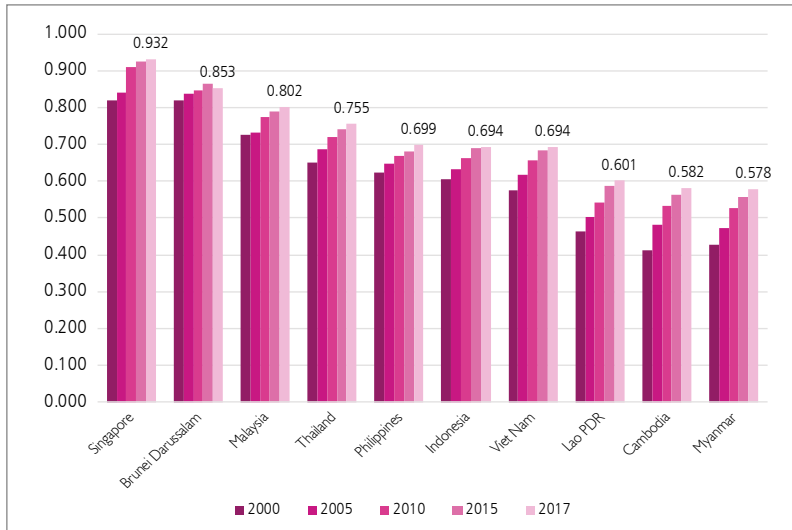
Figure 4.4 presents trends in HDI for 10 AMS during 2000-2017. Following UNDP's HDI categorization, three countries – Singapore, Brunei Darussalam and Malaysia were in the very high HDI category (with values of 0.800 or above), one country – Thailand was in the high HDI category (0.700 – 0.799), and the remaining six countries were in the medium HDI category (0.550 – 0.699) in 2017.

HDI values increased in all 10 AMS during the last 17 years, but at different

rates. Cambodia, Myanmar, Lao PDR, and Viet Nam experienced the fastest growth, with HDI values increased by 17%, 15%, 14% and 12%, respectively, between 2000 and 2017. This was then followed by Thailand and Singapore,

with a recorded 11% increase in HDI values. HDI values of Indonesia, Philippines, and Malaysia grew by around 8%; whereas that of Brunei Darussalam increased by 3% during the same period.

Figure 4.4. Human Development Index, ASEAN Member States, 2000-2017



Source: UNDP, Human Development Reports series.

5 LABOUR

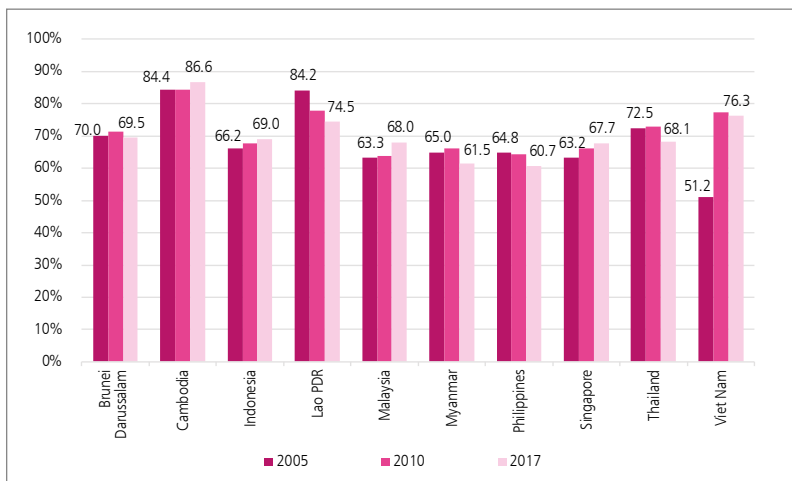
Introduction

Understanding the trends of labour market in ASEAN is important for designing effective policies for job creation. As the population in the region continues to grow along with the size of working-age population, the economy should keep up by providing employment opportunities for the growing labour force. This section describes trends in the labour force participation rates, unemployment rates and employment by main economic sectors in AMS over the last decade.

Labour force participation rate

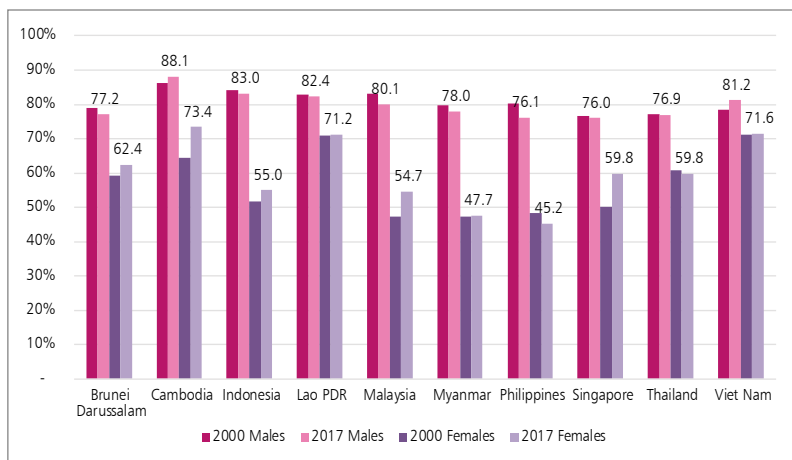
The labour force participation rate measures the proportion of a country's working-age population that engages actively in the labour market, either by working or looking for work; it can indicate the size of the supply of labour available to engage in the production of goods and services, relative to the population at working age (ILO, 2016). Figure 5.1 present the trends of labour force participation rate (LFPR) in AMS between 2007 and 2017. LFPR varied across AMS, ranging from 60-70% in Philippines,

Figure 5.1. Labour force participation rate (%), ASEAN Member States, 2007-2017



Source: ASEAN Secretariat, ASEANstats database.

Figure 5.2. Labour force participation rate by gender (%), ASEAN Member States, 2000 and 2017



Source: ASEAN Secretariat, ASEANstats database.

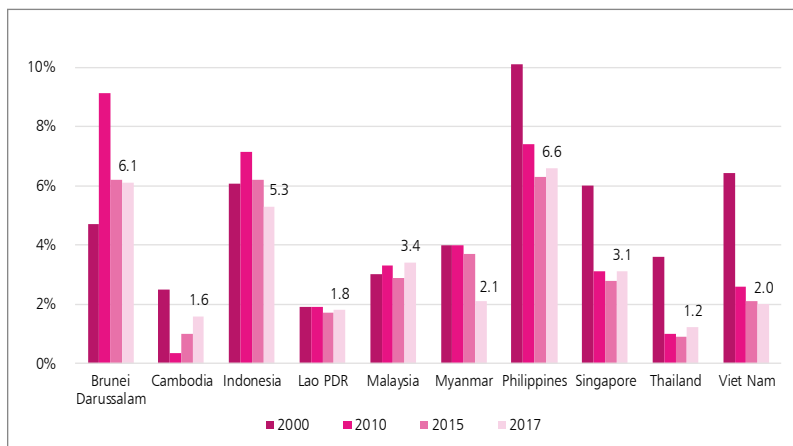
Myanmar, Indonesia, Singapore, Malaysia and Brunei Darussalam, to 75-85% in Cambodia, Lao PDR and Viet Nam in 2017.

Gender comparison of LFPR offers insight into any gender-differentiated extent of the working-age population's participation in the work force. Figure 5.2 indicates that in all 10 AMS, there was a higher male participation rate than female in 2017. The gender disparity in LFPR was highest in the Philippines at 76.1% for males as compared to 45.2% for females in 2017, followed by Myanmar (78.0% vs. 47.7%), Indonesia (83.0% vs. 55.0%) and Malaysia (80.1% vs. 54.7%). However, the gaps in LFPR between males and females have narrowed during the recent years.

Unemployment rate

The unemployment rate measures the under utilisation of the labour supply, reflecting the inability of those working-age population who are actively seeking work to find employment. The unemployment rate in all AMS were relatively low. As shown by Figure 5.3, the unemployment rates tend to fluctuate in all AMS over the observed period of 2000-2017, following the fluctuation in the economic environment. Having experienced relatively high unemployment rate in several AMS in 2000 possibly due to impacts of the Asian 1999 financial crisis, the rate was lowest in Thailand, Myanmar, Cambodia and Lao PDR at below 2%

Figure 5.3. Unemployment rate (%), ASEAN Member States, 2000-2017.



Source: ASEAN Secretariat, ASEANstats database.

in 2017. These were then followed by Viet Nam (2.0%), Myanmar (2.1%), Singapore (3.1%) and Malaysia (3.4%). At the same time, Philippines recorded a higher unemployment rate at 6.6%, followed by Brunei Darussalam (6.1%) and Indonesia (5.3%).

Employment by economic sectors

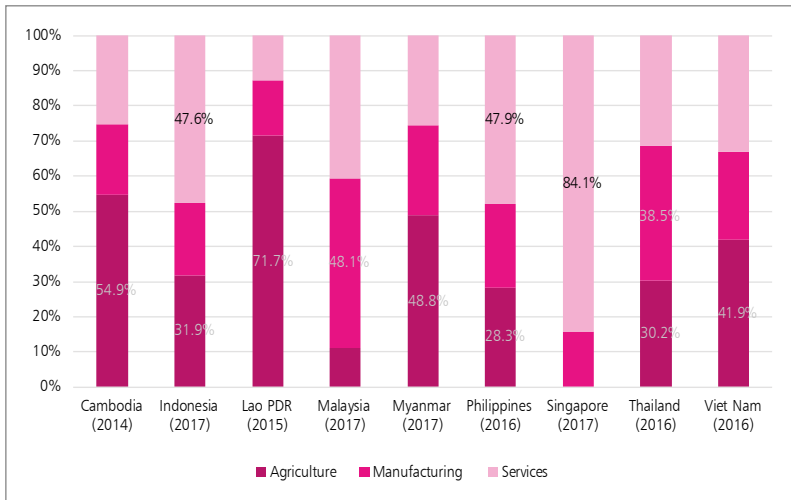
Figure 5.4 presents the employment structure by main economic sectors in 10 AMS, based on the most recent available data. Agricultural sector was a key contributor to employment in Lao PDR and Cambodia with over 71.7% and 54.9% of the total workers in both countries engaged in this sector, respectively. Elsewhere, agriculture also remained a key contributor to jobs, including in Myanmar (48.8%

of total employment), Viet Nam (41.9%), Indonesia (31.9%), Thailand (30.2%), and the Philippines (28.3%).

On the other hand, manufacturing sector which also includes construction and other sectors contributed 48.1% of total employment in Malaysia, 38.5% in Thailand, and 25.1% in Viet Nam. The share of employment in this secondary sector was lowest in Lao PDR at 15.6% in 2015.

Finally, the share of employment in the services sector was the highest in Singapore, covering 84.1% of the country total workers in 2017, followed by Philippines (47.9%) and Indonesia (47.6%). The contribution of the services sector to employment remains relatively low in Lao PDR at 12.7%.

Figure 5.4. Share of employment by main economic sectors (%), ASEAN Member States, various years



Source: ASEAN Secretariat, ASEANstats database.

6 ECONOMY

Introduction

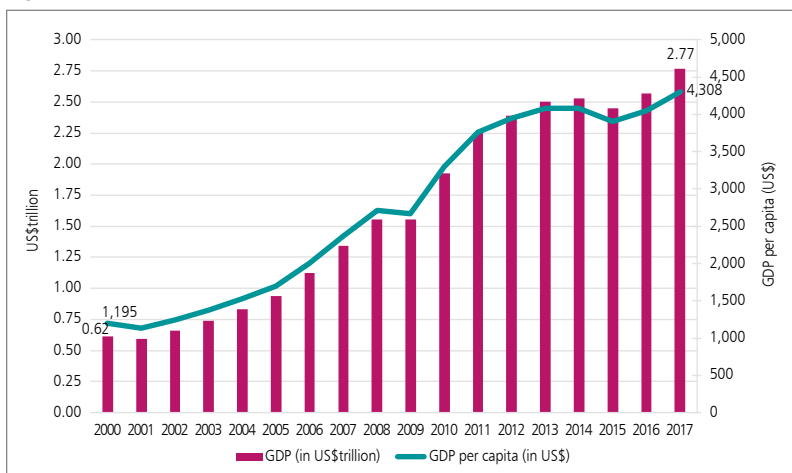
ASEAN has made tremendous economic progress over the recent decades. With current combined gross domestic products (GDP) of almost US\$2.8 trillion in 2017, ASEAN is now collectively ranked as the world 5th largest and Asian 3rd largest economy. This chapter presents an overview of the ASEAN's economy through updated data on GDP - both total values and per capita, GDP growth and GDP by main economic sectors in AMS and ASEAN as a total.

Gross Domestic Products (GDP)

GDP measures the value of all final goods and services produced in a country or region over a particular period of time. Figure 6.1 reports the trends of ASEAN GDP total values and per capita from 2000 to 2017. The ASEAN total GDP value in 2017 reached US\$2.77 trillion, almost four and a half times the value in 2000 (at US\$615 billion).

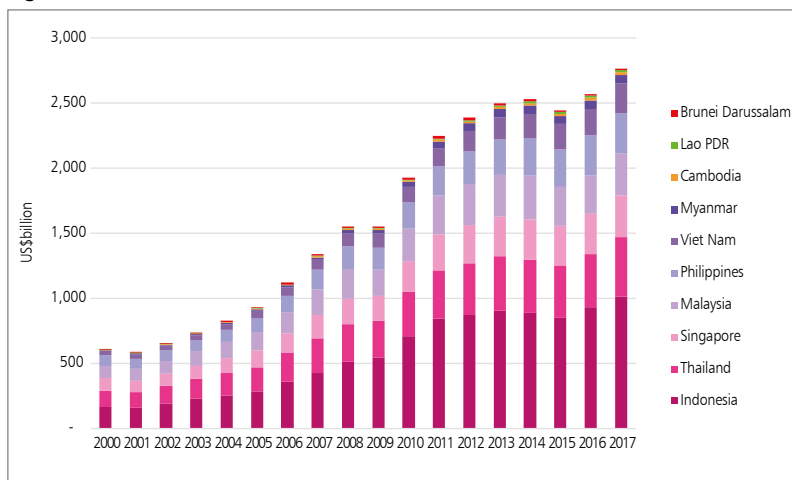
The trend in ASEAN GDP per capita follows closely the trend for the total GDP. After the fall experienced

Figure 6.1. ASEAN GDP total values and per capita, 2000-2017



Source: ASEAN Secretariat, ASEANstats database.

Figure 6.2. GDP total values (US\$billion), ASEAN Member States, 2000-2017



Source: ASEAN Secretariat, ASEANstats database.

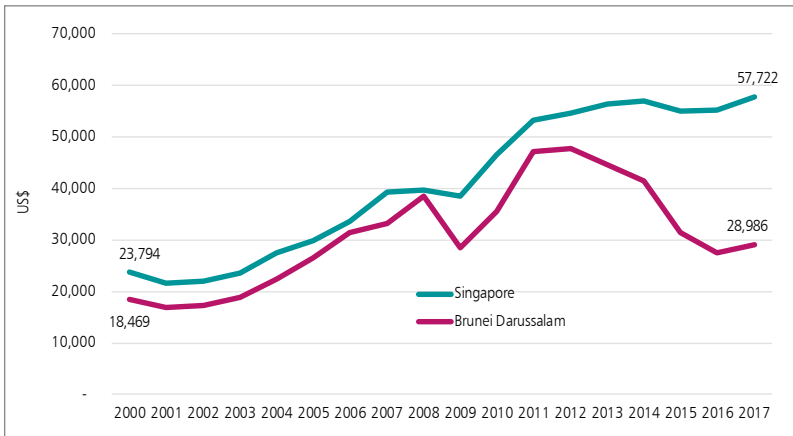
during the 1997-98 Asian Financial Crisis, ASEAN GDP per capita strongly increased from 2002 to 2008. Another decline was observed in 2009, likely as a result of the 2008-2009 Global Finance Crisis, followed by another period of growth –albeit fluctuating, reaching US\$4,308 in 2017.

As Figure 6.2 shows the breakdown of ASEAN’s total GDP by AMS from 2000 to 2017, indicating the diversity in economic size among ASEAN membership with Indonesia accounting for the largest share.

Figure 6.3 highlights the trends in GDP per capita by AMS from 2000 to 2017. GDP per capita in

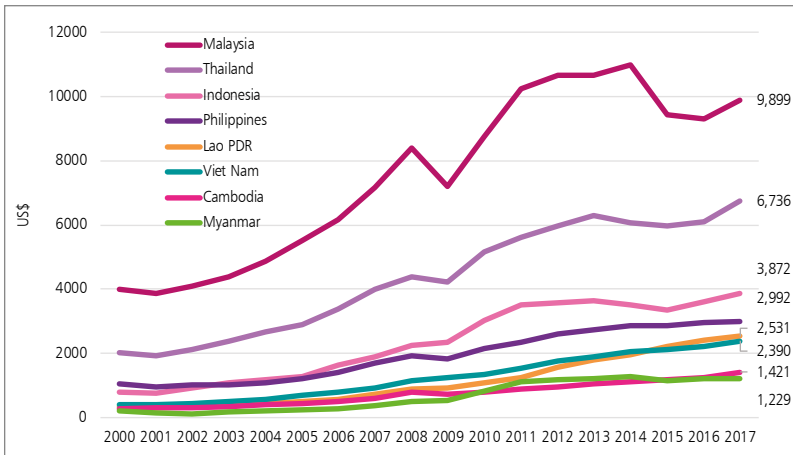
Singapore and Brunei Darussalam were considerably higher than the other AMS, reaching US\$57,772 and US\$28,986 respectively, in 2017. The 2017 GDP per capita of other AMS stood at US\$9,899 for Malaysia, US\$6,736 for Thailand, US\$3,872 for Indonesia, US\$2,992 for Philippines, US\$2,390 for Viet Nam, US\$2,531 Lao PDR, US\$1,421 for Cambodia, and US\$1,229 for Myanmar. While GDP per capita increased significantly in all AMS during 2000-2017, very rapid increases were mainly recorded in Lao PDR (with an increase of 662.0%), Myanmar (502.3%), Viet Nam (492.3%) and Cambodia (394.0%).

Figure 6.3a. GDP per capita (US\$), Brunei Darussalam and Singapore, 2000-2017



Source: ASEAN Secretariat, ASEANstats database.

Figure 6.3b. GDP per capita (US\$), in other ASEAN Member States, 2000-2017



Source: ASEAN Secretariat, ASEANstats database.

GDP Growth

ASEAN's real GDP growth rate has been consistently positive during 2000-2017. Following the economic recovery from the Asian financial crisis in 1998-1999 with growth rate at 6.0% in 2000, ASEAN GDP then continued to grow steadily with the annual average rate at 5.3% until 2017. Table 6.1 shows that the real GDP growth of AMS varied, with the highest annual average growth rates during the period of 2000-2017 being recorded in Myanmar (at 10.0%), followed by Cambodia (7.7%), Lao PDR (7.1%), and Viet Nam (6.5%). The combined annual average growth rate of GDP in these CLMV countries during the period was 7.6%, or higher than the combined rate of ASEAN6 at 5.0%.

GDP by main economic sectors

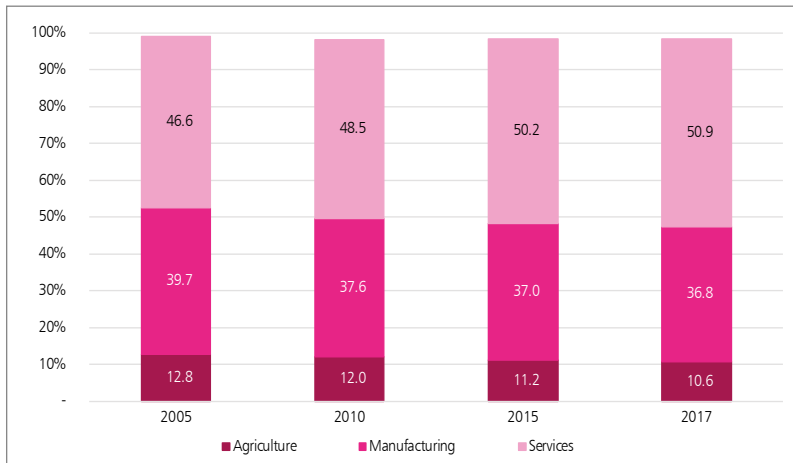
The breakdown of GDP by three main economic sectors over time reflects changes in the economic structure of a country or region. The three main sectors are agriculture, manufacturing and services. Agriculture includes farming, fishing, and forestry. Manufacturing includes manufacturing, electricity, gas and water supply, and construction, as well as mining & quarrying. Services covers trades, government activities, communications, transportation, finance, and all other private economic activities that do not produce material goods.

Table 6.1. GDP growth rate (%), ASEAN Member States, 2000-2017

ASEAN Member States	GDP growth rate (%)					Annual average
	2000	2005	2010	2015	2017	2000-2017
Brunei Darussalam	2.9	0.4	2.6	-0.4	1.3	0.8
Cambodia	8.4	13.6	6.0	7.0	6.8	7.7
Indonesia	5.4	5.7	6.2	4.9	5.1	5.3
Lao PDR	5.8	7.3	8.1	7.3	6.9	7.1
Malaysia	8.9	5.3	7.4	5.0	5.9	5.1
Myanmar	13.7	13.6	9.6	7.0	6.8	10.0
Philippines	4.4	4.8	7.6	6.1	6.7	5.3
Singapore	8.9	7.5	15.2	3.0	3.6	5.3
Thailand	4.5	4.2	7.5	3.0	3.9	4.0
Viet Nam	6.8	7.5	6.4	6.7	6.8	6.5
ASEAN	6.0	5.8	7.5	4.8	5.3	5.3

Source: ASEAN Secretariat, ASEANstats database.

Figure 6.4. GDP share by main economic sectors (%), ASEAN total, 2005-2017

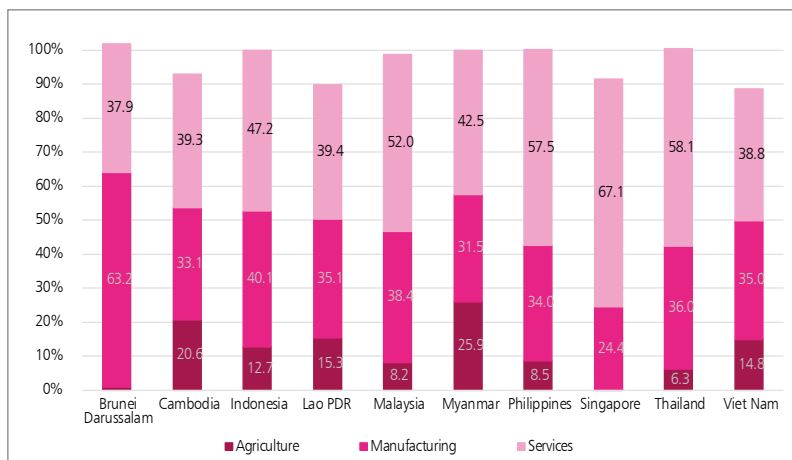


Source: ASEAN Secretariat, ASEANstats database.

Figure 6.4 shows an increasing share of the services sector during the recent years while the shares of both the agricultural and manufacturing sectors continued to decrease. The services sector covered around 50.9% of the region's total GDP in 2017, or an increase from 46.6% in 2005. The manufacturing sector contributed around 36.8% of ASEAN total GDP in 2017 (down from 39.7% in 2005), while the agricultural sector constituted only one-tenth of ASEAN total GDP in 2017 (down from 12.8% in 2005).

Country comparison in GDP composition by sectors reveals interesting patterns, as shown in Figure 6.5. Singapore has the largest share of services sector at more than two-thirds of the country's total GDP in 2017, followed by Thailand (58.1%), Philippines (57.5%), Malaysia (52.0%), and Indonesia (47.2%). In Brunei Darussalam, 63% of the economy was contributed by the manufacturing sector reflecting the importance of the oil industry. The agricultural sector still played an important role in the economy of Myanmar and also Cambodia with the share of 25.9% and 20.6% of total GDP in 2017, respectively.

Figure 6.5. GDP share by main economic sectors (%), ASEAN Member States, 2005-2017



Source: ASEAN Secretariat, ASEANstats database.

Notes: The total GDP shares of three main sectors may not equal to 100%, as some AMS recorded “balance items for GDP”, such as values of tax revenues and subsidies separated from the calculations of total values GDP. These AMS include Viet Nam (with the share of balance items to GDP at 11.4% of total GDP), Lao PDR (10.2%), Singapore (8.4%), Cambodia (7.0%), and other AMS below 2%.

7 INTERNATIONAL TRADE AND INVESTMENT

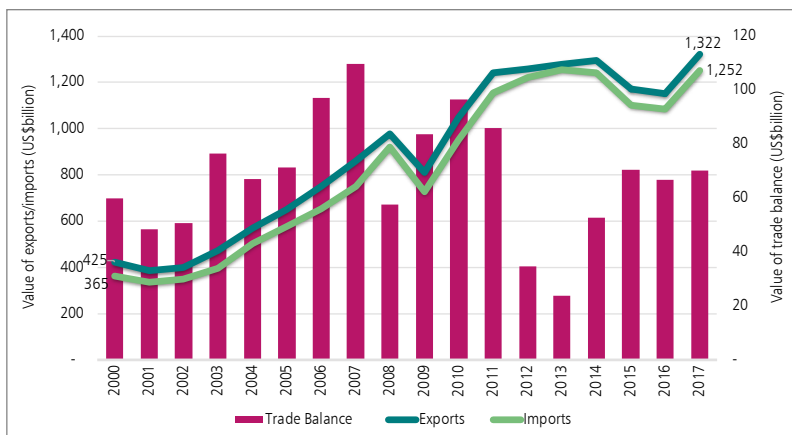
Introduction

International trade in goods (merchandise) and services, and foreign direct investment (FDI) are important components in the region's economy. During the last decade, these indicators have shown significant increases, with the values of total merchandise trade reaching almost US\$2.6 trillion, trade in services amounting at US\$703.2 billion, and FDI US\$135.6 billion in 2017.

International merchandise trade

ASEAN total merchandise trade has markedly increased from US\$790 billion in 2000 to US\$2,574 billion in 2017, or an increase of nearly 3.5 times. Exports of goods consistently rose during the period, except for a drop in 2009, reaching US\$1,322 billion in 2017. At the same time, total imports of goods reached US\$1,252 billion but remains consistently lower than exports, continuing the positive trend of trade balance during the observed period.

Figure 7.1. Value of exports and imports of goods and trade balance (US\$ billion), ASEAN total, 2000-2017

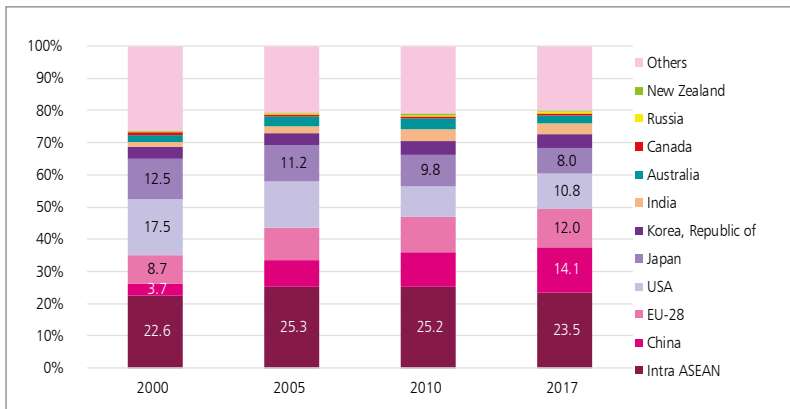


Source: ASEAN Secretariat, ASEANstats database.

Intra-ASEAN collectively is the largest market for ASEAN total trade. Figure 7.2 and 7.3 show that the share of intra-ASEAN merchandise exports and imports represented 23.5% and 22.3% of ASEAN total exports and imports, respectively, in 2017. The other largest markets for ASEAN exports in 2017

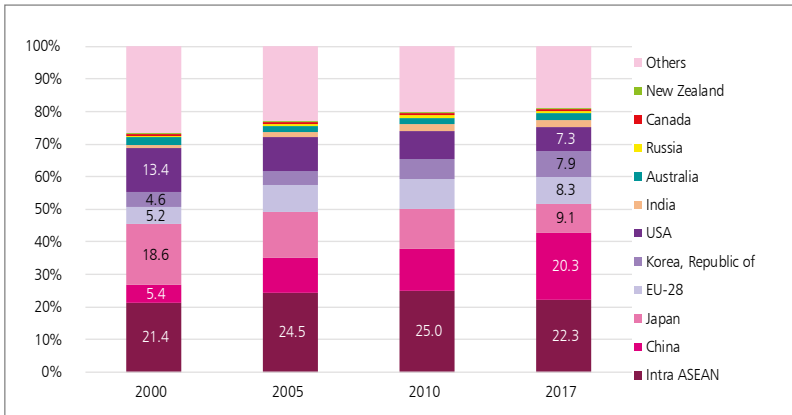
were China (14.1% of ASEAN total exports value), EU-28 (12.0%), USA (10.8%), and Japan (8.0%); while the other largest markets for ASEAN imports were China (20.3%), Japan (9.1%), EU-28 (8.3%), Republic of Korea (7.9%), and USA (7.3%).

Figure 7.2. Share of merchandise exports values by Intra-ASEAN and Dialogue Partners (%), 2000-2017



Source: ASEAN Secretariat, ASEANstats database.

Figure 7.3. Share of merchandise imports values by Intra-ASEAN and Dialogue Partners (%), 2000-2017

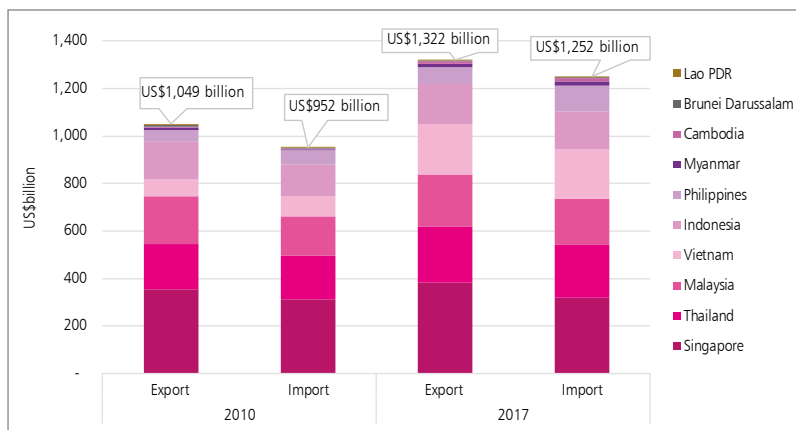


Source: ASEAN Secretariat, ASEANstats database.

Country comparisons in ASEAN trade market indicate that Singapore was the largest exporter and importer, with the shares of 29.0% and 25.4% of the ASEAN total, respectively, in 2017 (see Figure 7.4a and 7.4b). The following largest exporters and importers were Thailand (17.9% and 17.8%), Malaysia

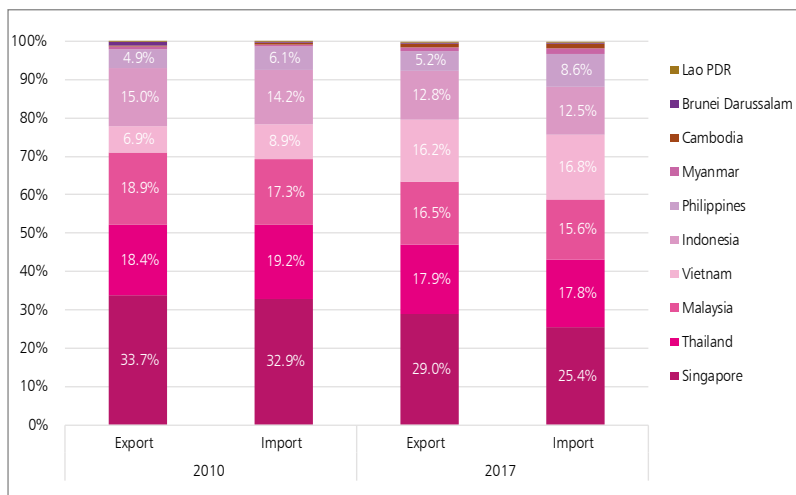
(16.5% and 15.6%), Viet Nam (16.2% and 16.8%) and Indonesia (12.8% and 12.5%). The exports and imports shares significantly increased in Viet Nam between 2000 and 2017, followed by slight increases in Philippines, Myanmar, Cambodia and Lao PDR.

Figure 7.4a. Values of exports and imports of goods (US\$billion), ASEAN Member States, 2000 and 2017



Source: ASEAN Secretariat, ASEANstats database.

Figure 7.4b. Shares of exports and imports of goods (%), ASEAN Member States, 2000 and 2017



Source: ASEAN Secretariat, ASEANstats database.

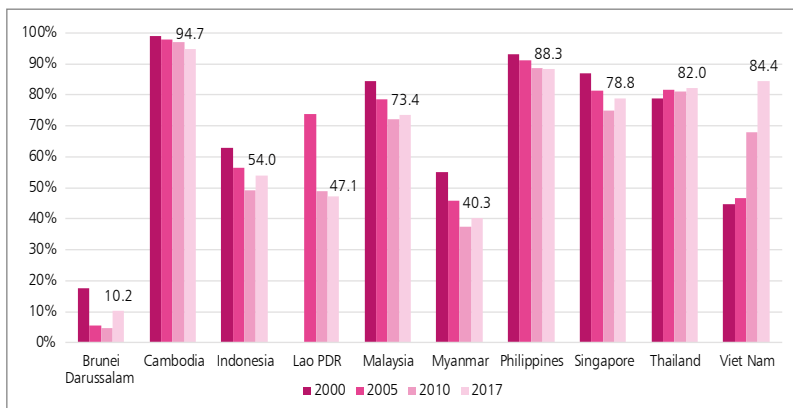
Manufacturing sector in ASEAN international merchandise trade

Manufacturing sector has been playing an important role in the ASEAN international merchandise trades – both for exports and imports, over the last decades. The rapid expansion of international trade in manufacturing products has brought about several AMS emerging as major exporters. But at the same time, AMS also open up their domestic economies for imports of manufacturing products from other countries.

The share of manufacturing products to the total international merchandise trade was relatively significant in most

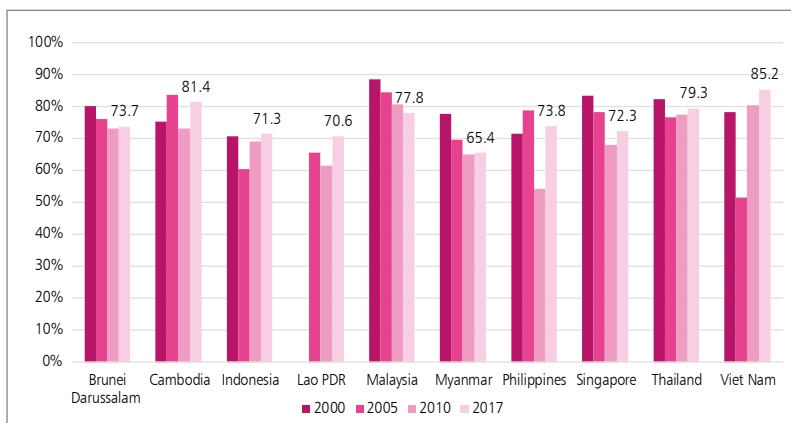
AMS. Figure 7.5 shows that the largest share of manufacturing products to the total exports was recorded in Cambodia (94.7% in 2017), followed by Philippines (88.3%), and Viet Nam (84.4%). While in Singapore, Thailand and Malaysia around 80% of their total exports came from the manufacturing sector in 2017, the share was around 50% and below in other AMS. At the same time, Figure 7.6 shows that the largest manufacturing share in imports of goods in 2017 was recorded in Viet Nam (85.2%) and Cambodia (81.4%), followed by Thailand (79.3%).

Figure 7.5. Share of manufacturing products to total exports (%), ASEAN Member States, 2000-2017



Source: ASEAN Secretariat, ASEANstats database.

Figure 7.6. Share of manufacturing products to total imports (%), ASEAN Member States, 2000-2017



Source: ASEAN Secretariat, ASEANstats database.

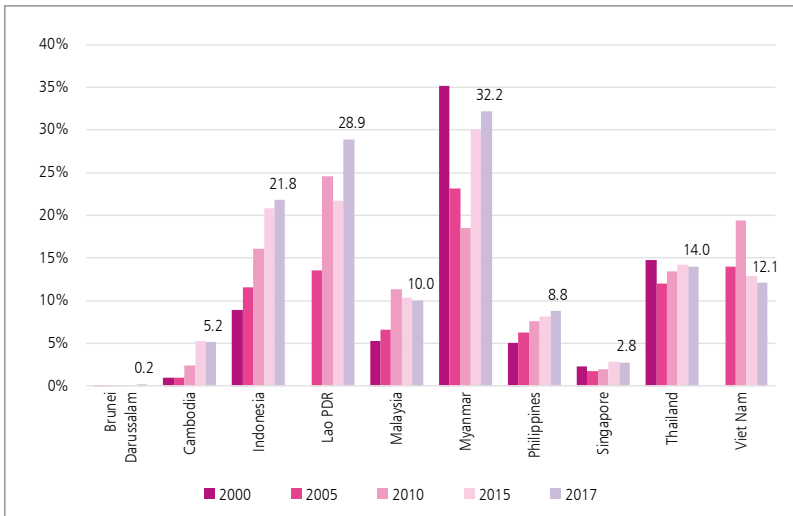
Agricultural sector in ASEAN international merchandise trade

Agricultural products contributed significant share to both total exports and imports of goods in some AMS. Figure 7.7 shows that AMS with the largest share of agricultural products to their total exports in goods included Myanmar (32.2% in 2017), followed by Lao PDR (28.9%) and Indonesia (21.8%). While the share in these three AMS, and to a lesser extent in Philippines increased during 2010-2017, the share however tended to decline in Malaysia and Viet Nam during the same period. In addition, the agricultural share to exports in

goods were around 10% or less in Malaysia (10.0%), Philippines (8.8%), Cambodia (5.2%), Singapore (2.8%) and Brunei Darussalam (0.2%).

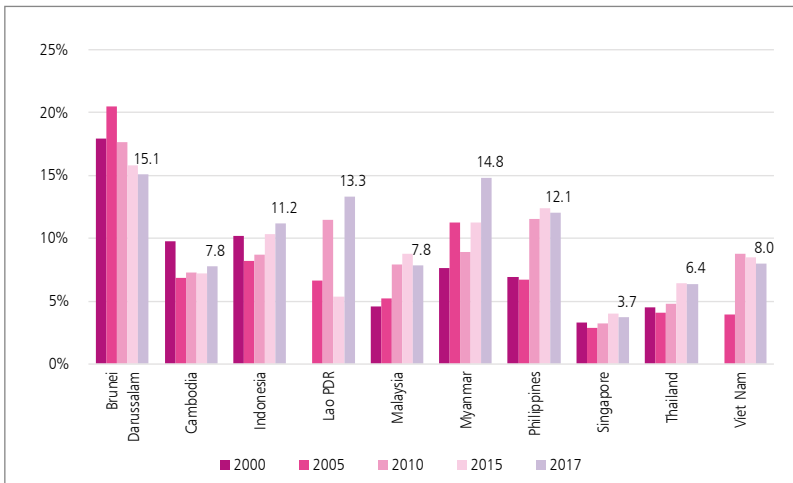
Figure 7.8 reports that the agricultural products share to the total imports in goods was relatively significant in Brunei Darussalam (15.1% in 2017), followed by Myanmar (14.8%), Lao PDR (13.3%), Philippines (12.1%) and Indonesia (11.2%). The share in other remaining AMS was well below 10%, with Singapore's share at only 3.7% in 2017.

Figure 7.7. Share of agricultural products to total exports (%), ASEAN Member States, 2000-2017



Source: ASEAN Secretariat, ASEANstats database.

Figure 7.8. Share of agricultural products to total imports (%), ASEAN Member States, 2000-2017



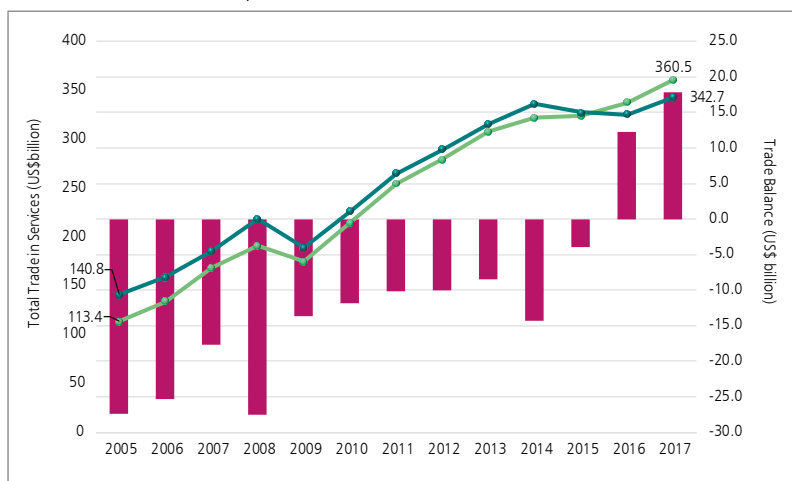
Source: ASEAN Secretariat, ASEANstats database.

International trade in services

Total ASEAN exports of services increased from US\$113.4 billion in 2005 to US\$360.5 billion in 2017 (See Figure 7.8). At the same time, total ASEAN imports of services increased from US\$140.8 billion in 2005 to US\$342.7 billion in 2017. Hence, after experiencing a continuous trade deficit, ASEAN has recorded positive balance on trade in services beginning 2016 to reach US\$17.9 billion in 2017.

The share of intra-ASEAN in ASEAN's trade in services remains relatively constant at around 17%. Figure 7.10 shows that during the period of 2005 to 2017, the share of intra-ASEAN exports has declined from 21.1% to 17.0%, while there was almost no change in the share of intra-ASEAN imports which is around 16.0%.

Figure 7.9. Values of exports and imports of services and trade balance (US\$ billion), ASEAN total, 2005-2017



Source: ASEAN Secretariat, ASEANstats database.

Figure 7.10. Values of intra and extra-ASEAN exports and imports of services (US\$ billion), 2005-2017

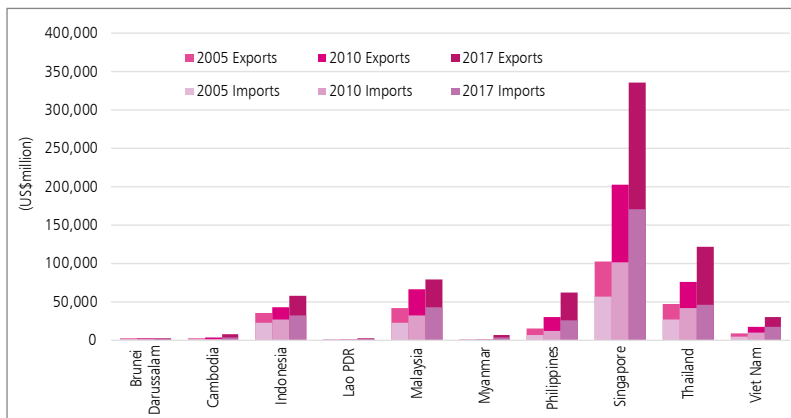


Source: ASEAN Secretariat, ASEANstats database.

Singapore constituted the largest share of total trade in services in the region at 47.7% in 2017, followed by Thailand (17.3%), Malaysia (11.3%)

and Philippines (8.8%) (Figure 7.11). However, among these top four AMS, only Philippines and Thailand had a positive trade balance in 2017.

Figure 7.11. Values of exports and imports of services (US\$million), ASEAN Member States, 2005, 2010 and 2017

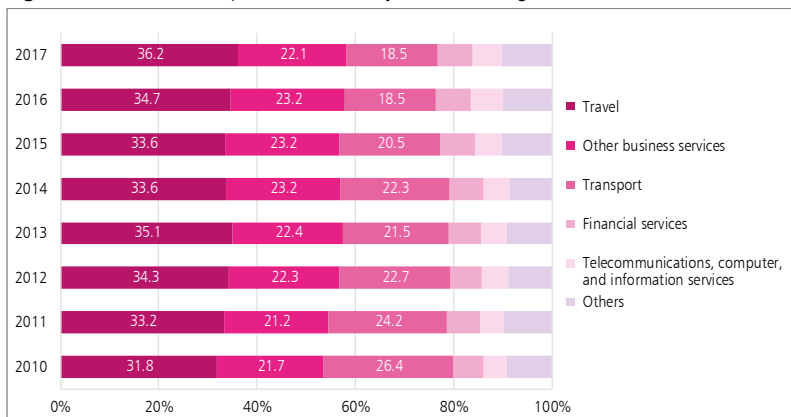


Source: ASEAN Secretariat, ASEANstats database.

The data also shows that travel has contributed 36.2% of total ASEAN exports and 21.1% of total ASEAN imports in 2017 (Figure 7.12 and 7.13). The next biggest contribution

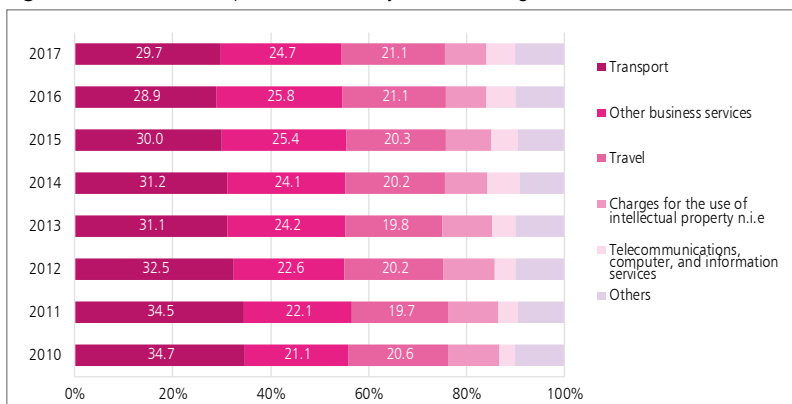
came from other business services (22.1% for exports and 24.7% for imports) and transport (18.5% for exports and 29.7% for imports).

Figure 7.12. Share of exports of services by broad headings (%), ASEAN total, 2000-2017



Source: ASEAN Secretariat, ASEANstats database.

Figure 7.13. Share of imports of services by broad headings (%), ASEAN total, 2000-2017



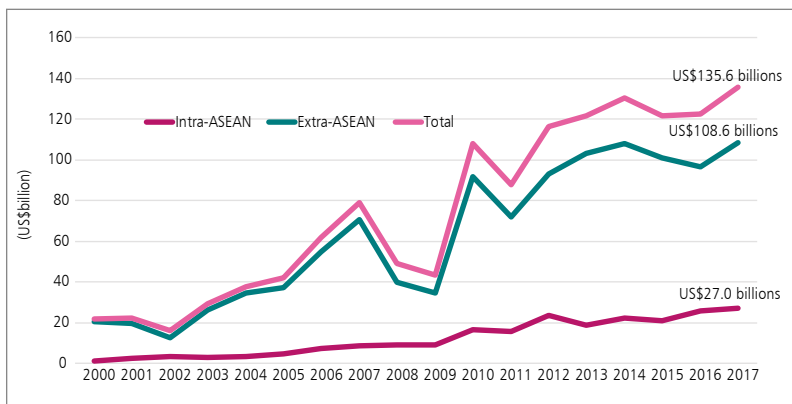
Source: ASEAN Secretariat, ASEANstats database.

Foreign direct investments

Inward flows of FDI to the region from both intra-ASEAN and extra-ASEAN have increased between 2000 and 2017, except for a drop of almost 50% in 2008-2009 due to the

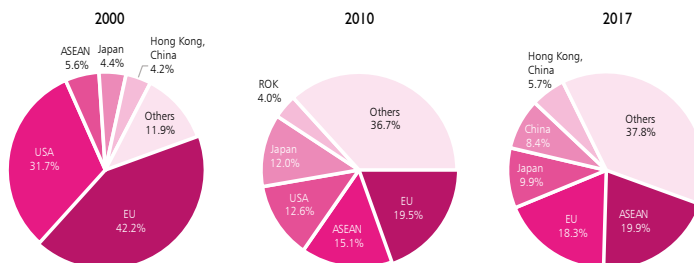
Global Financial Crisis (Figure 7.14). The region recorded the highest amount of FDI inflows in 2017, at US\$27.0 billion from intra-ASEAN and US\$108.6 billion from extra-ASEAN.

Figure 7.14. Inward flows of foreign direct investment, intra and extra-ASEAN (US\$billion), 2000-2017



Source: ASEAN Secretariat, ASEANstats database.

Figure 7.15. Share of ASEAN top 5 foreign direct investment sources (%), 2000, 2010 and 2017

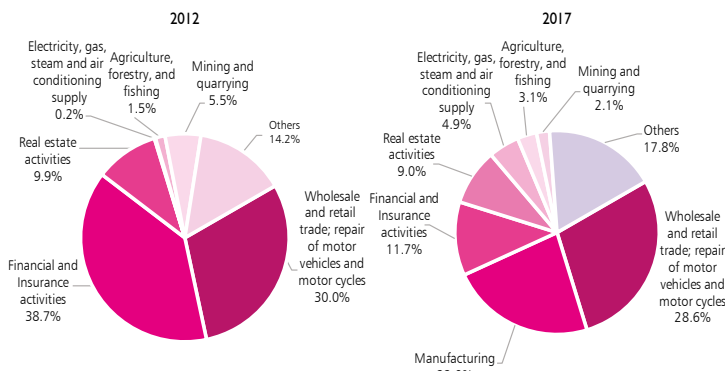


Source: ASEAN Secretariat, ASEANstats database.

In 2017, more than 19.9% of total ASEAN FDI inflows originates from within the region, an increase of almost 400% compared to the 2000's level at 5.6% (Figure 7.15). During the same period, EU remains as the largest extra-ASEAN source of FDI inflows, although its share has decreased from 42.2% in 2000 to 18.3% in 2017.

Wholesale and retail trade sector was the largest recipient of FDI inflows in the region with a share of 28.6% in 2017, decreased from 30.0% in 2012, as indicated in Figure 7.16. Other key FDI recipient sectors were manufacturing, with a share of 22.9% in 2017, financial and insurance activities (11.7% in 2017 down from 38.7% in 2012), and real estate activities (9.0% in 2017, slightly down from 9.9% in 2012).

Figure 7.16. Share of inward flows of foreign direct investment by activities (%), 2012 and 2017



Source: ASEAN Secretariat, ASEANstats database.

8 TRANSPORT, TOURISM AND COMMUNICATION

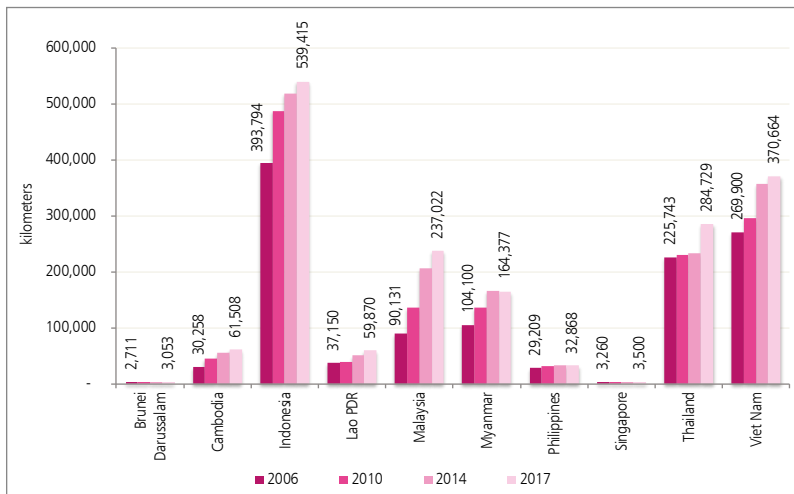
Introduction

Indicators related to transport, tourism and communication provides insights into the state and developments relating to connectivity in the region. Peoples and places are connected by physical transportation infrastructure, through travels, and increasingly through digital means. This chapter shows the progress made in the development of land and air transport, tourism industry, and internet use in most AMS during the last decade.

Road length and total vehicles

Total road length is defined as the total kilometer length of all roads in the country in a given year, including all existing road types, but excluding the dedicated cycle paths. Figure 8.1 shows a significant increase in the total road length in all AMS, reaching almost 1.8 million kilometers in 2017, or an increase of 48.1% from the total length in 2006. Indonesia, Viet Nam, Thailand, Malaysia, and Myanmar are found to have the longest road

Figure 8.1. Road length (kilometres), ASEAN Member States, 2006-2017



Source: ASEAN Secretariat, ASEANstats database.

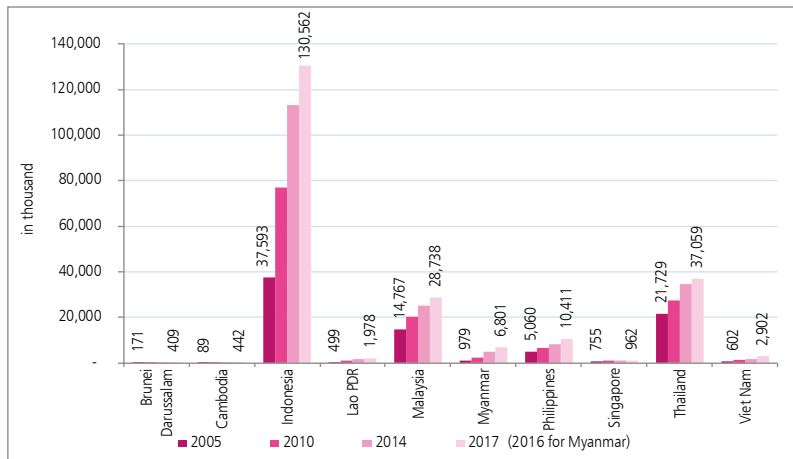
connectivity with 539,415, 370,664, 284,729, 237,022 and 164,377 kilometers, respectively, in 2017; whereas other AMS had less than 60,000 kilometers. It is worth noting that road length is not just a function of economic development but also of land area of a country.

The average increment of road length in all AMS during the period of 2006-2017 reached 63,417 kilometers per annum. Indonesia and Malaysia recorded the highest average increments of road length at well over 16,000 kilometers annually during the period, followed by Viet Nam with an average increment above 11,000 kilometers annually.

Figure 8.2 indicates the rapid increase in the number of registered vehicles across AMS, reaching over 220 million units in 2017, an increase of 167.8% compared to 2005, or 8.6% per year on average. The increase was especially high in Myanmar (17.5% per year), Cambodia (14.3% per year), Lao PDR (12.2% per year), and Indonesia (10.9% per year) during the period of 2005-2017.

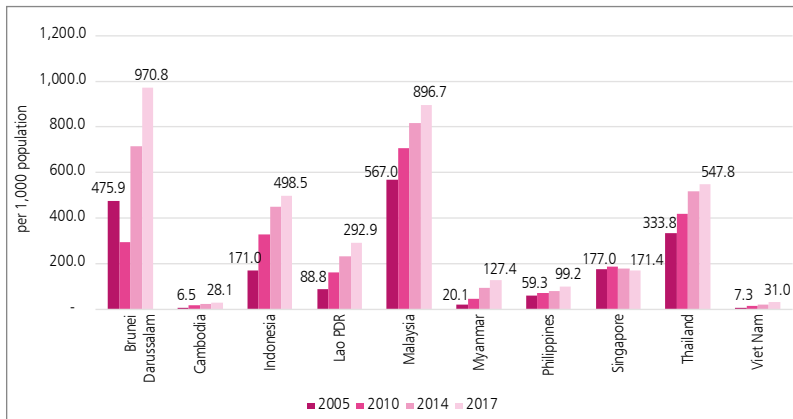
Given its large population size, Indonesia had a much higher number of registered vehicles than other AMS, at over 130 million units, or almost 60% of the ASEAN total registered vehicles in 2017. However, using a more comparable measure of a ratio of total vehicles per 1000 population,

Figure 8.2. Total number of registered road motor vehicles (000), ASEAN Member States, 2005-2017



Source: ASEAN Secretariat, ASEANstats database.

Figure 8.3. Number of registered road motor vehicles per 1000 population, ASEAN Member States, 2005-2017



Source: ASEAN Secretariat, ASEANstats database.

Figure 8.3 shows that Brunei Darussalam, Malaysia and Thailand recorded the highest ratios at 971, 897 and 548 respectively in 2017. Indonesia came fourth at 499, then followed by Lao PDR (293), Singapore (171), and Myanmar (127). Cambodia, the Philippines and Viet Nam had ratios below 100 units of vehicles per 1000 population in 2017.

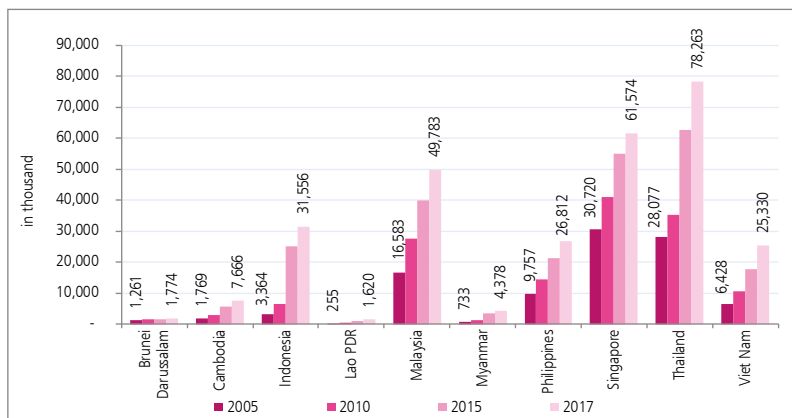
International air passengers

Trends in number of international air passengers is a key indicator for the tourism sector, although arguably not all international air passengers are tourists, and not all tourists travel by air. International air passengers can indicate the extent to which a country is an attractive international destination.

Figure 8.4 reports that the total number of international air passengers in all 10 AMS has grown rapidly from 92.4 million in 2004 to 288.8 million in 2017, or a more than tripling the 2004 number. Countries with the largest numbers of international air passengers in 2017 were Thailand (78.3 million), Singapore (61.6 million), Malaysia (49.8 million), and Indonesia (31.6 million). Meanwhile, the number of international air passengers in Cambodia, Myanmar, Brunei Darussalam and Lao PDR were still below 8 million.

In terms of growth, with an annual rate of 20.5% during the period of 2005 and 2017, Indonesia has the fastest growing number of international air passengers. Significant growth was

Figure 8.4. Number of international air passengers (000) by ASEAN Member States, 2005-2017



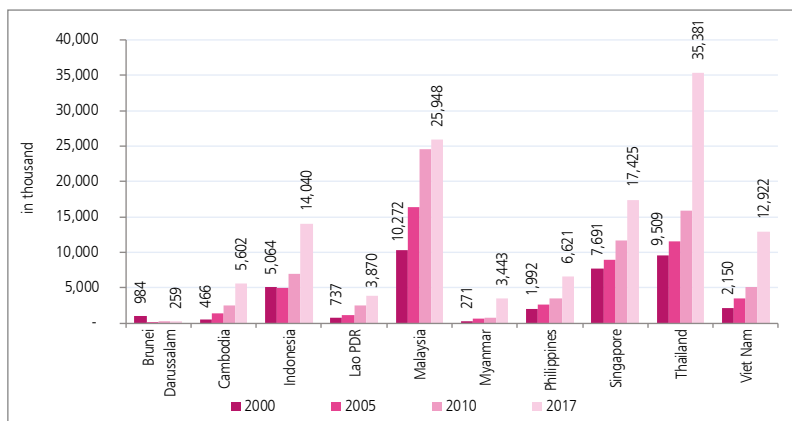
Source: ASEAN Secretariat, ASEANstats database.

also recorded in Lao PDR, Myanmar and Cambodia with annual rates of growth 16.7%, 16.1% and 13.0%, respectively, over the same period.

Visitor arrivals

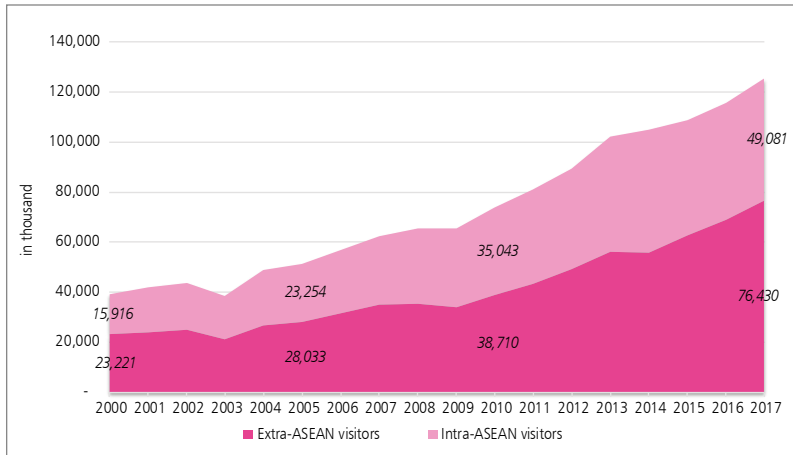
Total number of visitor arrivals to ASEAN has markedly increased during from 2000 to 2017, reaching

Figure 8.5. Number of visitor arrival (000) by ASEAN Member States, 2000- 2017



Source: ASEAN Secretariat, ASEANstats database.

Figure 8.6. Intra and extra-ASEAN visitor arrival (000), 2000-2017



Source: ASEAN Secretariat, ASEANstats database.

125.5 million in 2017, an increase of 220.7% compared to 2000, or on average 7.1% per year (see Figure 8.5). Myanmar, Cambodia and Viet Nam have the highest growth rate in the region with annual growth 16.1%, 15.7% and 11.1% respectively.

ASEAN Member States receiving the highest number of visitors in 2017 were Thailand (35.4 million), Malaysia (25.9 million), Singapore (17.4 million), Indonesia (14.0 million), and Viet Nam (12.9 million). Lao PDR and Myanmar received under 4 million visitors each.

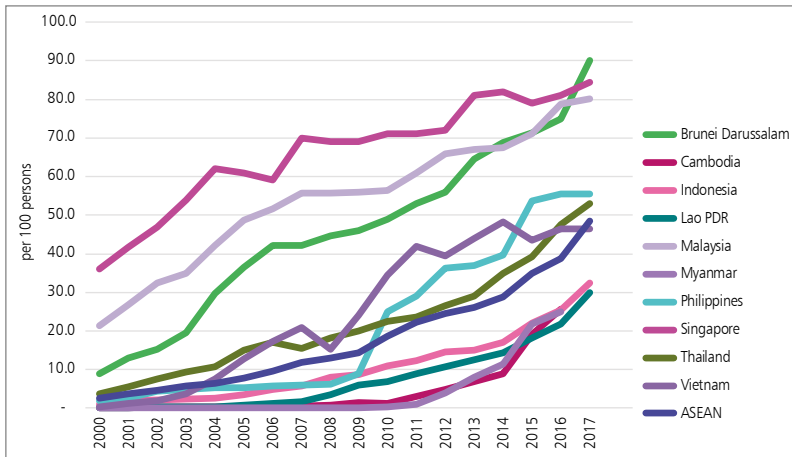
Moreover, Figure 8.6 indicates that visitor arrivals from intra-ASEAN made up 49.1 million or 39.1% of the ASEAN total in 2017. This 2017 figure was a significant increase of from 15.9

million intra-ASEAN visitor arrivals recorded in 2000.

Internet subscribers

All AMS have been experiencing very rapid growth in the use of the internet for the last recent years. Figure 8.7 shows that the total number of internet subscribers in all AMS reached 48.5 per 100 population in 2017, as compared to only 2.5 in 2000. Brunei Darussalam, Singapore and Malaysia recorded the highest number of internet users, at 90, 84, and 80 subscribers per 100 population, respectively, in 2017. Although the internet subscribers in other remaining AMS were relatively lower, however significant growth has been observed since 2000.

Figure 8.7. Number of internet users per 100 persons, ASEAN Member States, 2000-2017



Source: ASEAN Secretariat, ASEANstats database.

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