

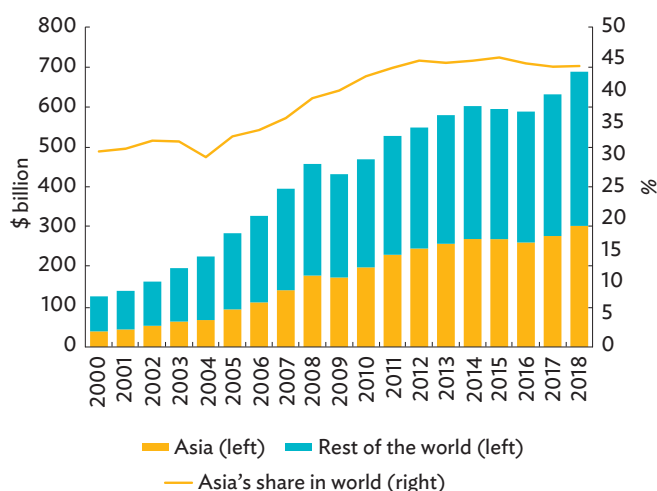
# 4 Movement of People

## Remittances

**Remittance inflows to Asia continue to climb, reaching a record \$302.1 billion in 2018.**

Global remittances (inflows) grew 7.6% to \$682.6 billion in 2018 (Figure 4.1).<sup>19</sup> Remittances to Asia grew 8.4%, above the global rate, adding \$23.4 billion to the

**Figure 4.1: Remittance Inflows to Asia and the World**



Source: ADB calculations using data from Global Knowledge Partnership on Migration and Development. <http://www.knomad.org/data/remittances> (accessed October 2019).

2017 level. The growth was attributed to improved economic performance and job market conditions in the United States (US), the rise in oil prices, a rebound in remittances from Middle East economies and improved economic activity in the Russian Federation (World Bank 2019).

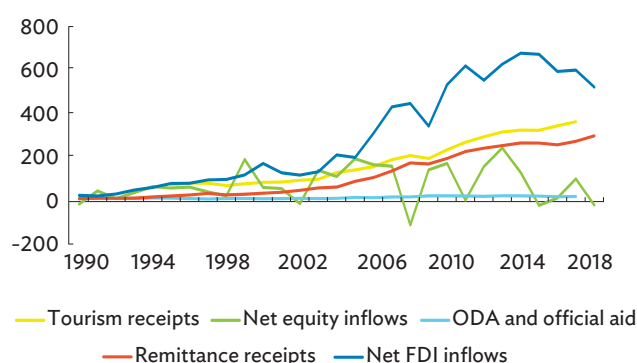
Remittances are a key, stable source of income for many countries in developing Asia. On average, remittance inflows were 10 times the level of official development assistance (ODA) since 2012 and are significant contributors to national output (Figure 4.2). They bolster foreign exchange reserves and directly provide for the consumption, investment, and savings needs of household beneficiaries. As immediate financial flows, remittances help ease the conditions of the poor, particularly in recipient countries with high rates of poverty.<sup>20</sup>

**Remittance inflows across all major geographic regions increased in 2018, except the Middle East. Inflows to Asia expanded by 8.4%.**

Remittance inflows increased across all global subregions, except the Middle East (World Bank 2019).

<sup>19</sup> The World Bank defines personal remittances as the sum of personal transfers and compensation of employees. Personal transfers include all current transfers in cash or in kind between resident and nonresident individuals, independent of the source of income of the sender (and regardless of whether the sender receives income from labor, entrepreneurial or property income, social benefits and any other types of transfers, or disposed assets) and the relationship between the households (regardless of whether they are related or unrelated individuals). Compensation of employees refers to the income of border, seasonal, and other short-term workers who are employed in an economy where they are not resident and of residents employed by nonresident entities.

<sup>20</sup> Yoshino, Taghizadeh-Hesary, and Otsuka (2017) found that a 1% increase in international remittances as a percentage of gross domestic product (GDP) can lead to a 22.6% decline in the poverty gap ratio and a 16.0% decline in the poverty severity ratio in the sample of 10 developing Asian countries from 1981 to 2014. The poverty gap ratio indicates how far below the poverty line the average poor household's income or expenditure falls. Poverty severity (or squared poverty gap index) is measured by averaged squares of the poverty gaps relative to the poverty line.

**Figure 4.2: Financial Flows to Asia by Type (\$ billion)**

FDI = foreign direct investment, ODA = official development assistance.

Sources: ADB calculations using data from Global Knowledge Partnership on Migration and Development. <http://www.knomad.org/data/remittances>; and World Bank. World Development Indicators. <https://databank.worldbank.org/source/world-developmentindicators> (both accessed October 2019).

By absolute value, Asia was highest at \$302.1 billion, up by \$23.4 billion (Table 4.1). The region benefited from strong oil prices, which improved flows from the Middle East, and the sustained strength of the US labor market. The Middle East hosts significant proportions of migrant workers from South Asia and Southeast Asia and has been a primary remittance source for these subregions. In 2017, around 59% of remittance inflows to South Asia came from Middle East economies; in Southeast Asia, the Middle East accounted for about one-fourth.<sup>21</sup>

Inflows to Europe rose by \$11.3 billion to \$171.4 billion, driven by sustained economic activities in major European outflow countries such as Poland, the Russian Federation, and Spain. Brisk outflows from the US kept remittances to Latin America and the Caribbean robust at \$89.9 billion, a 9.5% jump facilitated by increases in migration and amounts remitted (The Dialogue 2019).

With the exception of Central Asia and Oceania, remittance inflows to all subregions in Asia grew (Table 4.2). South Asia continued to be the lead subregion for remittances, accounting for at least 40% of Asia's total remittances; inflows increased by 12.7%. Local currency depreciation in South Asia contributed to the greater volume of inflows. Inflows to India, the world's top recipient country, gained momentum in 2018—growing by 14.0%, outpacing the 9.9% growth in 2017. In Bangladesh, remittances grew to a record \$15.6 billion after contracting in 2016 and 2017. Remittances to Southeast Asia rose by 7.8%, with East Asia inflows rising by 5.0% over 2017—inflows to both subregions increased by more than \$5.0 billion. Remittances to Mongolia spiked 61.2% to \$440.6 million due to migrant remittances from the Republic of Korea and the Russian Federation. In Southeast Asia, higher inflows from land- and sea-based overseas Filipino workers and the 5.3% depreciation of the peso against the US dollar led remittance flows to the Philippines to reach \$33.8 billion, making it the

**Table 4.1: Remittance Inflows by Recipient Region, 2018**

Region	Share of Total (%)	Amount (\$ billion)	Change over 2017 (\$ billion)	Growth Rate (%)
Asia	44.3	302.1	23.4	8.4
Europe	25.1	171.4	11.3	7.1
Latin America and the Caribbean	13.2	89.9	7.8	9.5
Middle East	3.6	24.4	-0.1	-0.3
North America	1.2	8.0	0.6	7.7
Africa	12.1	82.8	5.4	7.0

Source: ADB calculations using data from Global Knowledge Partnership on Migration and Development. <http://www.knomad.org/data/remittances> (accessed October 2019).

<sup>21</sup> Saudi Arabia's campaign of labor nationalization (*Nitaqat*) had already resulted in reduced migrant inflows from South Asia, specifically Bangladesh, India, and Pakistan. The *Nitaqat* campaign to increase Saudis in the workforce (launched in September 2011) is a system that combines incentives that encourage firms to hire Saudis and sanctions for those noncompliant. Since its inception, *Nitaqat* has phased out expatriates from a growing number of activity sectors and positions, now restricted solely to Saudi nationals. A decree effective October 2018 bans foreign laborers from 12 more retail sectors. Contracts of expatriates employed in government bodies and ministries are also to be terminated within 3 years and, since 2017, the validity of expatriate work visas for private sector employees has been reduced from 2 years to 1 year (De Bel-Air 2018).

**Table 4.2: Remittance Inflows to Asian Subregions, 2018**

Subregion	Amount (\$ billion, % share of total in parentheses)	Change over 2017 (\$ billion, % growth in parentheses)	Economy Within Subregion with Highest Growth (% y-o-y growth in parentheses)
Central Asia	13.0 (4.3%)	-0.6 (-4.5%)	Georgia (13.4%)
East Asia	79.4 (26.3%)	3.8 (5.0%)	Mongolia (61.2%)
South Asia	132.0 (43.7%)	14.9 (12.7%)	Bhutan (34.8%)
Southeast Asia	74.7 (24.7%)	5.4 (7.8%)	Indonesia (24.7%)
Oceania	2.3 (0.8%)	-0.1 (-5.2%)	New Zealand (3.7%)
Pacific	0.8 (0.3%)	0.01 (1.0%)	Solomon Islands (20.3%)

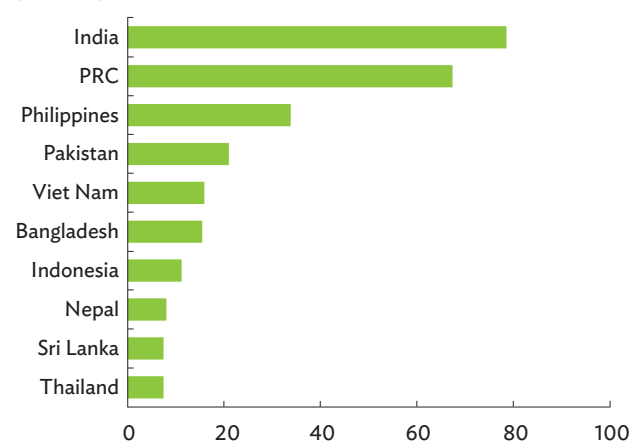
y-o-y = year-on-year.

Source: ADB calculations using data from Global Knowledge Partnership on Migration and Development. <http://www.knomad.org/data/remittances> (accessed October 2019).

fourth-largest remittance recipient globally. Remittances to Indonesia grew by 24.7% and brought in \$2.2 billion in additional receipts in 2018. Indonesia saw the outflow of workers rise by 11.7% between 2016 and 2017—those in elementary occupations increased by 16.8% but the number of managers rose by 29.8% and professionals by 32.0% (International Labour Organization 2018). In New Zealand, the 3.7% rise in remittances reversed the falling inflow trend since 2015. Meanwhile, Australia's downward streak of remittance flows continued in 2018. Pacific developing member countries (DMCs), with smaller populations relative to other regions, received the least remittances.

### Remittances remain a vital income source for many countries in developing Asia.

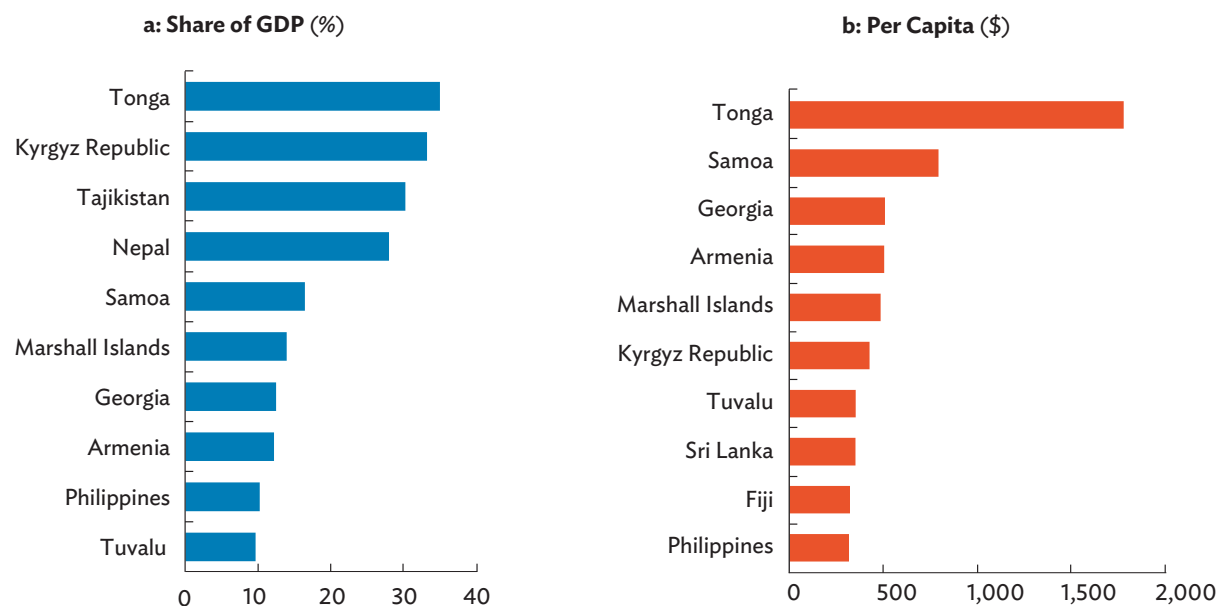
In 2018, the top three remittance recipients—India, the People's Republic of China (PRC), and the Philippines—accounted for 59.5% (\$179.8 billion) of all remittances to Asia and 26.3% of remittances globally (\$682.6 billion) (Figure 4.3). In 2018, remittances increased in South Asia (12.7%), Southeast Asia (7.8%), and East Asia (5.0%). Together, the three subregions received 94.7% of inflows to Asia and 41.9% of global remittances.

**Figure 4.3: Top 10 Remittance Recipients in Asia, 2018**  
(\$ billion)

PRC = People's Republic of China.

Source: ADB calculations using data from Global Knowledge Partnership on Migration and Development. <http://www.knomad.org/data/remittances> (accessed October 2019).

Pacific DMCs and countries in Central Asia received smaller amounts of remittances, but inflows represent a significant proportion of gross domestic product (GDP). In Tonga, for example, remittances are significant both in per capita terms and in proportion to GDP (Figures 4.4a and 4.4b). Shortages of agricultural land, and limited educational and work opportunities drive

**Figure 4.4: Top 10 Remittance-Recipient Economies in Asia, 2018**

GDP = gross domestic product.

Sources: ADB calculations using data from Global Knowledge Partnership on Migration and Development. <http://www.knomad.org/data/remittances> (accessed October 2019); International Monetary Fund. World Economic Outlook October 2019 Database. <https://www.imf.org/external/pubs/ft/weo/2019/02/weodata/index.aspx> (accessed October 2019); and United Nations. Department of Economic and Social Affairs, Population Division. World Population Prospects 2019. <https://population.un.org/wpp/Download/Standard/Population/> (accessed August 2019).

around 50% of adult Tongans to work abroad—mostly in New Zealand, Australia, and the US (International Finance Corporation 2018). Around 90% of Tongan households rely on remittances as an income source (Fonua 2012). In Central Asia, remittance inflows are equivalent to some 33.0% of GDP for the Kyrgyz Republic and Tajikistan, and around 12.0% of GDP in Georgia and Armenia. In the Pacific, remittances equal around 10.0% of GDP in Tuvalu and Kiribati. In the Philippines, remittances remain a vital source of monetary inflows. As vital as remittance inflows are, the cost of sending money to home countries remains a pervasive constraint to maximizing the benefit of remittances to developing Asian economies.<sup>22</sup>

**Remittance inflows are projected to sustain its growth momentum as new labor migration opportunities are created amid a moderate global economic growth outlook for most host countries.**

Despite migration policies taking a more restrictive trend in some major host countries—and global growth expected to remain moderate—the Global Knowledge Partnership on Migration and Development (2019) estimates global remittances will grow by 3.5% and 4.6% in 2019 and 2020, respectively; compared with the 7.6% growth in 2018. During this period, inflows to Asia should expand by 4.6% and 4.4% to \$315.8 billion

<sup>22</sup> ADB calculations using data from the World Bank's Remittance Prices Worldwide database indicate that the global average cost of sending remittances (expressed as a percentage of remitted amount) declined to 6.9% in the first quarter (Q1) of 2019; though it varies considerably across Asian subregions. For example, the average cost of sending \$200 in cash via a bank in Oceania to Samoa was 12.5% in Q1 2019, more than half of what it used to cost in Q1 2017 (26.7%). Sending the same amount to Tonga cost 9.6% in Q1 2019, lower than 11.2% in the same period in 2017. Although these average costs are lower than 2017 rates, they remain far above the 6.9% global average in Q1 2019 and still far from the Sustainable Development Goal (SDG) target of 3% by 2030.

and \$329.7 billion, respectively. Traditional migrant host countries such as the US issued fewer immigrant (down by 4.6%) and nonimmigrant visas (down by 6.8%) in 2018. Employment-preference visas rose by 14.8% to 27,345 in 2018—69.7% of which went to workers from Asia.<sup>23</sup> In the Middle East, the collective aim to reduce dependence on foreign labor will likely reduce the flow of low-skilled and retail workers to the region. However, their aim to develop the technology sector and become a regional digital hub implies an increase in demand for foreign digital investors, high-skilled workers, and information technology technicians. For example, to support their digital development goal, the United Arab Emirates and Saudi Arabia have established privileged visa processes to ease the flow of high-quality foreign workers and technology entrepreneurs into the region.<sup>24</sup> Additionally, some migrant host countries in Asia have begun to relax migration policies, driven by labor market needs amid rapidly aging populations. Japan passed a law in December 2018 that allows the entry of 345,000 workers within the next 5 years. This is expected to generate higher remittances to priority countries identified in the law—Cambodia, Indonesia, Mongolia, Myanmar, Nepal, the PRC, the Philippines, Thailand, and Viet Nam. The Republic of Korea is also planning to host 56,000 foreign workers to ease its low-skilled labor shortage.

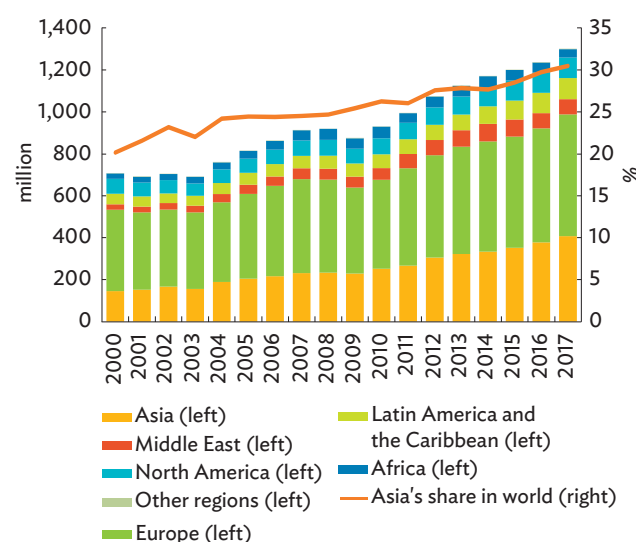
## International Tourism and the Movement of Visitors

**International tourism remained robust in 2017, as 1.3 billion visitors traveled to various parts of the globe. The share of global arrivals to Asia rose to 30.5% in 2017 from 26.3% in 2010.**

Global tourism has been growing at a sustained rate since 2010, as the liberalization of air travel market, the emergence of budget airlines, and innovations in digital and mobile technology revolutionized bookings for accommodations and airfares. The number of international visitors grew by 5.2% in 2017—from 1.3 billion in 2016—as economic growth continued to fuel demand for international travel.<sup>25</sup>

Tourism is important in many countries in Asia where it significantly contributes to economic growth and development.<sup>26</sup> International travelers to Asia expanded rapidly to 407.6 million in 2017 from 251.4 million in 2010, clear evidence of the region's success in showcasing itself as a hub of premier destinations (Figure 4.5). By 2017, the region had captured about a third (30.5%) of the total

**Figure 4.5: Global Visitor Arrivals by Region**



Source: ADB calculations using data from United Nations World Tourism Organization. Tourism Satellite Accounts. <http://statistics.unwto.org/> (accessed April 2019).

<sup>23</sup> According to the US Department of State Bureau of Consular Affairs, the US issued 533,557 immigrant visas in 2018. The number declined across all immigrant visa categories except for the employment preference category, which increased to 27,345 in 2018 from 23,814 in 2017. This was the most employment category visas issued since 2005.

<sup>24</sup> In May 2019, Saudi Arabia approved its “Privileged Iqama” residency scheme that allows expatriates to live and work without the need of sponsorship by a Saudi national. The United Arab Emirates’s “Gold Card” are 5- and 10-year residency permits in three broad categories for investors, entrepreneurs, and special talents.

<sup>25</sup> According to the 2008 Recommendations for Tourism Statistics (United Nations Statistical Commission 2007), *tourism* refers to the activity of *visitors*. A *visitor* is a traveler taking a trip to a main destination outside his/her usual environment, for less than a year, for any purpose (business, leisure or other personal purpose) other than to be employed by a resident entity in the country or place visited. A *visitor* is classified as a *tourist* (or overnight visitor), if his/her trip includes an overnight stay, or as a *same-day visitor* (or excursionist) otherwise. There are no significant differences between the numbers of visitors and tourists in many countries except for the PRC where some 60% of visitors are same-day visitors arriving from Hong Kong, China and Macau, China.

<sup>26</sup> For example, tourism accounted for some 14% of the Thai economy in 2017 with its development direction included in the Twelfth National Economic and Social Development Plan (2017–2021). In Cambodia, tourism is the third-largest economic sector after agriculture and garments, and the second-highest income earner. Growth of Viet Nam’s tourism is one of the fastest in the world and, as early as 2011, the government released its *Strategy on Vietnam’s Tourism Development until 2020, Vision to 2030* to promote the industry. In Fiji, tourism remains a priority area with a target income goal of \$2.21 billion by 2021.



number of global travelers, up from 26.3% in 2010. During the same period, the number of international visitors to Asia grew at an average annual rate of 7.1%, surpassing the world average, as the region hosted 29.5 million more travelers in 2017. Europe, which historically draws the largest number of arrivals (580.9 million visitors in 2017) and the largest share of the global total (43.9% on average since 2010) posted 6.8% growth in 2017, lower than Asia. North America drew 97.7 million visitors, 1.4% higher than 2016,<sup>27</sup> despite an 8.8% decline in the number of B1/B2 visas issued.<sup>28</sup> Even the Middle East posted a modest growth of 1.0% after security challenges resulted in 2 consecutive years in which arrivals contracted (2015 and 2016).

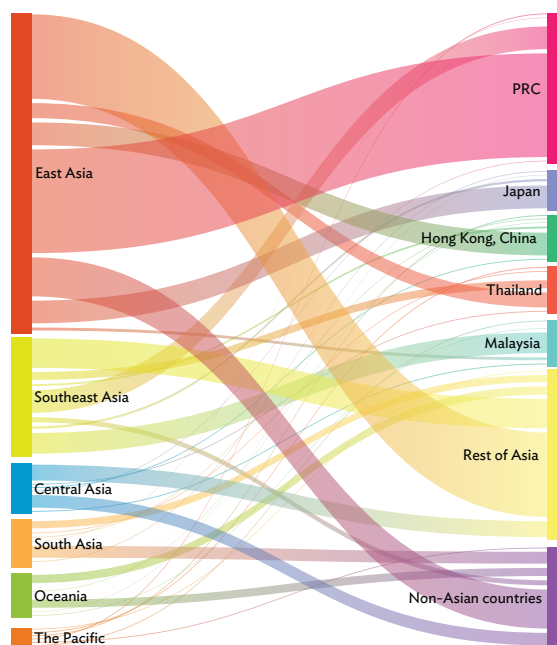
## Movement of Visitors in Asia

**Visitor arrivals to Asia grew by 7.8% in 2017 to 407.6 million due to robust growth in the number of intraregional visitors (up by 8.0%) as well as extraregional visitors (up by 7.2%).**

Intraregional visitors in Asia reached 319.6 million, an increase of 23.6 million from 2016.<sup>29</sup> East Asia and Southeast Asia had the strongest pull in intraregional arrivals, attracting 11.4 million and 7.6 million in additional arrivals, respectively. Extraregional arrivals (87.9 million), on the other hand, continued its upward trend since 2015, with robust growth averaging 7.5% in 2016 and 2017.

Greater tourism cooperation in the region drove intraregional arrivals to a record high as 23.6 million more Asian visitors traveled within the region from 2016 (Figure 4.6). Large numbers of Asian travelers headed to East Asia (59.0% of intraregional Asian visitors) and Southeast Asia (30.9%). The number of intraregional arrivals grew across all Asian subregions, with Central Asia registering the highest growth (22.3%) as 2.8 million more Asian visitors traveled to Central Asian countries. Initiatives to ease travel among Central Asian countries have started under the

**Figure 4.6: Intraregional and Extraregional Flows of Visitors from Asia, 2017**



PRC = People's Republic of China.

Source: ADB calculations using data from United Nations World Tourism Organization, Tourism Satellite Accounts. <http://statistics.unwto.org/> (accessed April 2019).

Central Asia Regional Economic Cooperation (CAREC) Program. Improved visa facilitation measures have been initiated in line with reviving and promoting tourism among countries along the Silk Road (Box 4.1). South Asia also had double-digit growth (17.8%) in intraregional travel with 7.1 million intraregional visitors in 2017.

More extraregional visitors also traveled to Asia, reaching 87.9 million in 2017, up from 82.0 million in 2016 (Figure 4.7). Europe (41.5%), North America (18.6%), and the Middle East (7.1%) were the top three source regions. East Asia and Southeast Asia were the preferred subregional destinations for Europe and North America, while visitors from the Middle East primarily traveled to Central Asia and Southeast Asia. On average, extraregional visitors traveling to Asia grew by 3.8% annually from 2010 to 2016—and by 7.2% in 2017.

<sup>27</sup> However, 60.7% of this increase was due to 826,443 more visitors to Canada. In 2017, the number of visitors to the US grew 0.7% relative to 2016. Visitors to the US from the Middle East fell sharply since 2016, when growth rates contracted 2.5% after rising 11.8% in 2015; and contracted further by 12.7% in 2017.

<sup>28</sup> The US Bureau of Consular Affairs issues B1 visas for business visits to the US, while B2 visas are for tourism. A B1/B2 visa may be used for either purpose. In 2017, 6.3 million B1/B2 visas were issued, 8.8% lower than the 6.9 million visas issued in 2016. In 2018, the number of B1/B2 visas declined further by 9.1% to 5.7 million.

<sup>29</sup> In terms of tourists, Asia attracted 23.4% (310.7 million) of global tourist arrivals in 2017, up from 24.0% (305.4 million) in 2016. Inbound tourists from both Asia (up by 10.3% from 2016) and non-Asia (up by 8.2%) contributed to the high growth in Asian tourism. Intraregional tourists accounted for nearly 80% of tourists to Asia.

### Box 4.1: Relaxing Visa Policies to Boost Tourism in CAREC

Tourism development is one of the operational priorities under the Central Asia Regional Economic Cooperation (CAREC) Program's CAREC 2030 strategy. As the subregion's premier economic and social cooperation platform, CAREC seeks to connect people, policies, and projects for shared and sustainable development. In October 2018, a workshop was held in Tashkent, Uzbekistan to assess opportunities and challenges for regional tourism cooperation. It led to the publication of a scoping study on promoting regional tourism cooperation under CAREC 2030 (ADB 2019). At ADB's 52nd annual meeting in Fiji, a high-level session underscored CAREC's regional approach to tourism development by facilitating travel between its 11 members and promoting multicountry experiences that could reap greater socioeconomic benefits for each. With a combined population of 1.8 billion producing 16.6% of global gross domestic product in 2018, the regional initiative holds much tourism potential.<sup>a</sup> International arrivals to the subregion grew 23.8% in 2017 to 177.8 million, up from 143.6 million in 2010.<sup>b</sup> Tourism receipts reached \$42.8 billion in 2017.<sup>c</sup> Natural and cultural resource diversity is one of CAREC's main attractions. But several major challenges must be overcome, especially in both hard and soft infrastructure. Transport facilities and existing border control arrangements to manage tourists moving in, out, and around CAREC countries are still below international standards.

Visa policies play an important role in ensuring a destination's capacity to carry out and control tourism demand—through immigration control and managing the entry, duration of stay, or activities of travelers; generating revenue; and applying reciprocity measures (UNWTO 2013). However, bothersome visa requirements can reduce a tourist's desire to visit another country. Within CAREC, there are heterogenic visa policies. Afghanistan, Mongolia, the People's Republic of China (PRC), and Turkmenistan mostly require visas from

tourists in other CAREC countries, while Azerbaijan, Georgia, and Uzbekistan have eased border restrictions with varying visa-free arrangements (Box Table 1). Bilateral reciprocity of visa policies is not necessarily observed. For example, a visa is required for Central Asian tourists going to the PRC, but PRC tourists visiting Georgia, Kazakhstan, the Kyrgyz Republic, Tajikistan, and Uzbekistan can obtain e-visas. ADB (2019) finds that visa openness supports visa reciprocity between members within regional blocs; and that facilitation can help strategic policy formulation, triggering improved visa policies for visitors between regional members.

Harmonizing visa policies across CAREC can only improve tourism numbers. Intra-CAREC visitor arrivals grew by 23.4% to 16.4 million tourists in 2017, a marked improvement from the tepid 2.6% growth in 2016 (Box Figure).<sup>d</sup> Within Central Asia, Kazakhstan, the Kyrgyz Republic, and Uzbekistan had the largest increase in intra-CAREC arrivals, accounting for around 70% of the increase from 2016. These three countries also have relatively visa-free policies and e-visa facilities compared to other CAREC countries. However, even if arrivals growth rates rose from 5.2% in 2010 to 9.7% in 2017, intra-CAREC tourism remains weak, accounting for less than 10% of total arrivals in the subregion. By comparison, tourism within the Association of Southeast Asian Nations (ASEAN) more than doubled during the same period (Box Figure). There were 46.6 million intra-ASEAN arrivals in 2017, equivalent to 38.7% of total tourism in Southeast Asia. In the Greater Mekong Subregion (GMS), intra-GMS tourism accounted for 20.2% of total international arrivals.

Visa entry arrangements also differ significantly for tourists from non-CAREC countries (Box Table 2). Georgia, Kazakhstan, the Kyrgyz Republic, and Uzbekistan have more visa-free arrangements with the sample of source countries within and outside Asia. Mongolia's visa policy

### 1: Visa-Entry Arrangements among CAREC Members

Origin Country	Destination										
	AFG	AZE	GEO	KAZ	KGZ	MON	PAK	PRC	TAJ	TKM	UZB
Afghanistan		vr	ev	vr	ev	vr	vr	vr	ev	vr	ev
Azerbaijan	vr		vf-360	vf-30	VF	vr	voa	vr	vf-90	vr	VF
Georgia	vr	vf-90		vf-90	VF	vr	ev	vr	VF	vf-90	VF
Kazakhstan	vr	vf-90	vf-360		VF	vf-90	ev	vr	VF	vr	VF
Kyrgyz Republic	vr	vf-90	vf-360	vf-90		vf-90	ev	vr	VF	vr	vf-60
Mongolia	vr	vr	ev	vf-90	vf-90		ev	vf-30	voa/ev-45	vr	vf-30
Pakistan	vr	ev	ev	vr	ev	vr		vr	ev	vr	ev
PRC	vr	voa-ev	ev	ev	ev	vr	ev		ev	vr	ev-30
Tajikistan	vr	vf90	vf-360	vf-30	VF	vr	voa/ev-90	vr		vr	vf-30
Turkmenistan	vr	ev	vf-360	ev	ev	vr	ev	vr	voa/ev-45		ev
Uzbekistan	vr	vf90	vf-360	vf-30	vf60	vr	ev	vr	vf-30	vr	

VF = visa-free    vf-360 = visa-free for 360 days    vf-90 = visa-free for 90 days    vf-30 = visa-free for 30 days

ev = e-visa    ev-30 = e-visa for 30 days    ev-90 = e-visa for 90 days    ev-45 = e-visa for 45 days

voa = visa on arrival    vr = visa required

AFG = Afghanistan, AZE = Azerbaijan, GEO = Georgia, KAZ = Kazakhstan, KGZ = Kyrgyz Republic, MON = Mongolia, PAK = Pakistan, PRC = People's Republic of China, TAJ = Tajikistan, TKM = Turkmenistan, UZB = Uzbekistan.

Source: Arton Capital's PassportIndex.org database (electronic). <http://www.passportindex.org> (accessed August 2019).

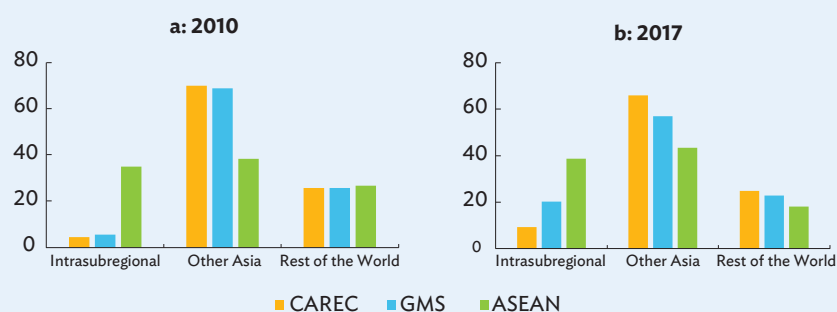
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### Box 4.1: Relaxing Visa Policies to Boost Tourism in CAREC (continued)

is also more open to non-CAREC countries. Given the considerable weight of tourism traffic from non-CAREC countries, accelerating simpler and more accessible visa arrangements (such as visa-on-arrival and online visa applications) and lower visa costs would help portray the region as more tourist friendly. Pakistan wants to introduce a single visa for tourists visiting the CAREC

subregion, to both facilitate tourist movement and increase the likelihood of tourists doing multicountry visits, increasing the average time of stay and spending per tourist.<sup>6</sup> In strengthening intrasubregional ties, this would also help CAREC “brand” itself better as a future tourist destination for visitors from other countries in Asia—which make up at least 60% of its market.

**Intrasubregional Tourism Shares—CAREC, ASEAN, and GMS (%)**



ASEAN = Association of Southeast Asian Nations, CAREC = Central Asia Regional Economic Cooperation Program, GMS = Greater Mekong Subregion.

Note: Calculations are based on arrivals data for Azerbaijan, Georgia, Kazakhstan, the Kyrgyz Republic, Mongolia, the People's Republic of China (PRC), Tajikistan, and Uzbekistan for CAREC; Brunei Darussalam, Cambodia, Indonesia, the Lao People's Democratic Republic (Lao PDR), Malaysia, Myanmar, the Philippines, Singapore, Thailand, and Viet Nam for ASEAN; and Cambodia, the Lao PDR, Myanmar, the PRC, Thailand, and Viet Nam for GMS.

Source: ADB calculations using data from United Nations World Tourism Organization Tourism Satellite Accounts. <http://statistics.unwto.org/> (accessed April 2019).

## 2: Visa-Entry Arrangements for Tourists from Outside CAREC

Origin Country	Destination										
	AFG	AZE	GEO	KAZ	KGZ	MON	PAK	PRC	TAJ	TKM	UZB
Australia	vr	ev	vf-360	vf-30	vf-60	vr	ev	vr	voa/ev-45	vr	vf-30
Canada	vr	ev	vf-360	vf-30	vf-60	vf-30	ev	vr	voa/ev-45	vr	vf-30
Germany	vr	ev	vf-360	vf-30	vf-60	vf-30	voa/ev-90	vr	voa/ev-45	vr	vf-30
Japan	vr	voa/ev-30	vf-360	vf-30	vf-60	vf-30	voa/ev-90	vf-15	voa/ev-45	vr	vf-30
Korea, Rep. of	vr	voa/ev-30	vf-360	vf-30	vf-60	vr	voa/ev-90	vr	voa/ev-45	vr	vf-30
New Zealand	vr	ev	vf-360	vf-30	vf-60	vr	voa/ev-90	vr	voa/ev-45	vr	vf-30
Russian Federation	vr	vf-90	vf-360	vf-90	VF	vf-30	ev	vr	VF	vr	VF
Singapore	vr	voa/ev-30	vf-360	vf-30	vf-60	vf-30	voa/ev-90	vf-15	voa/ev-45	vr	vf-30
United Kingdom	vr	ev	vf-360	vf-30	vf-60	vr	ev	vr	voa/ev-45	vr	vf-30
United States	vr	ev	vf-360	vf-30	vf-60	vf-90	ev	vr	voa/ev-45	vr	ev-30

VF = visa-free, vf-360 = visa-free for 360 days, vf-90 = visa-free for 90 days, vf-30 = visa-free for 30 days

ev = e-visa, ev-30 = e-visa for 30 days, ev-90 = e-visa for 90 days, ev-45 = e-visa for 45 days

voa = visa on arrival, vr = visa required

AFG = Afghanistan, AZE = Azerbaijan, GEO = Georgia, KAZ = Kazakhstan, KGZ = Kyrgyz Republic, MON = Mongolia, PAK = Pakistan, PRC = People's Republic of China, TAJ = Tajikistan, TKM = Turkmenistan, UZB = Uzbekistan.

Source: Arton Capital's PassportIndex.org database (electronic). <http://www.passportindex.org> (accessed August 2019).

<sup>a</sup> International Monetary Fund. World Economic Outlook October 2019 Database. <https://www.imf.org/external/pubs/ft/weo/2019/02/weodata/index.aspx> (accessed October 2019).

<sup>b</sup> United Nations World Tourism Organization. Tourism Satellite Accounts. <http://statistics.unwto.org/> (accessed April 2019).

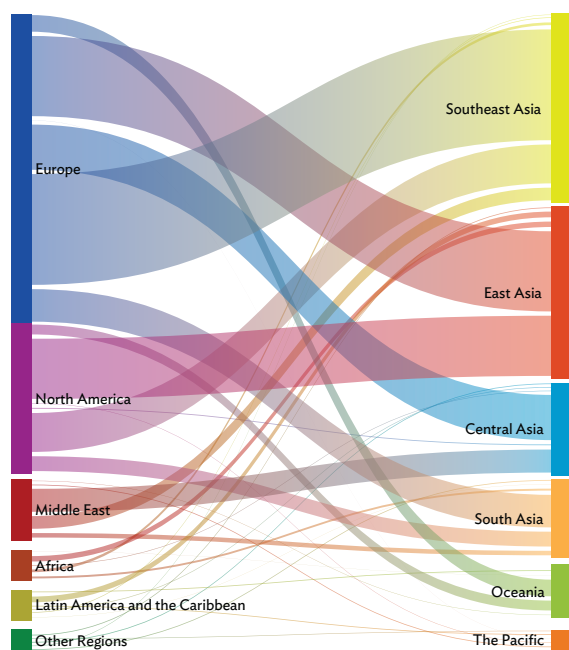
<sup>c</sup> World Bank. World Development Indicators. <https://databank.worldbank.org/source/world-development-indicators> (accessed October 2019).

<sup>d</sup> Based on ADB computations using data from United Nations World Tourism Organization. Tourism Satellite Accounts. <http://statistics.unwto.org/> (accessed April 2019).

<sup>e</sup> Kazakhstan and Uzbekistan are in the process of preparing a visa common to both countries. Dubbed as the “Silk Visa,” it would allow tourists with a valid visa from either country to visit both.

Source: ADB staff.

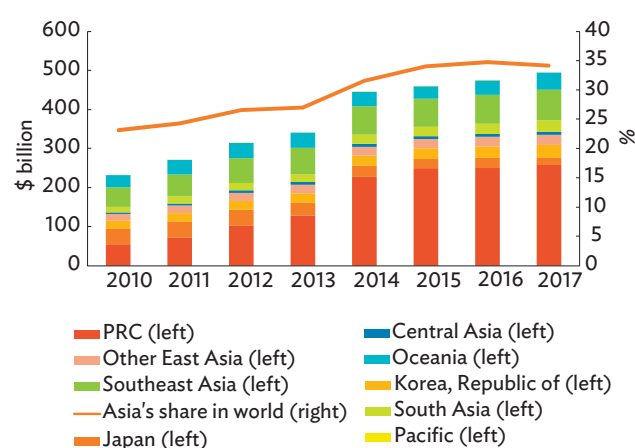


**Figure 4.7: Extraregional Visitor Flows to Asia, 2017**

Source: ADB calculations using data from United Nations World Tourism Organization. Tourism Satellite Accounts. <http://statistics.unwto.org/> (accessed April 2019).

Among Asian economies, the greatest number of visitors to Asia in 2017 came from Hong Kong, China and the PRC. Between 2010 and 2017, Asian tourist expenditures doubled, led by the PRC, reaching \$495.3 billion in 2017.

The top three visitors to Asia came from Hong Kong, China; the PRC; and the Republic of Korea (Table 4.3). Steady income growth regionally continues to boost the number of tourists and travel expenditures (Figure 4.8). Tourism expenditures from Asia (led by outbound tourists from the PRC, Australia, and the Republic of Korea) doubled between 2010 and 2017 reaching \$495.3 billion in 2017. East Asia's tourism spending per outbound tourist nearly doubled, from \$790 to \$1,343

**Figure 4.8: Tourism Expenditure by Asian Economies**

PRC = People's Republic of China.

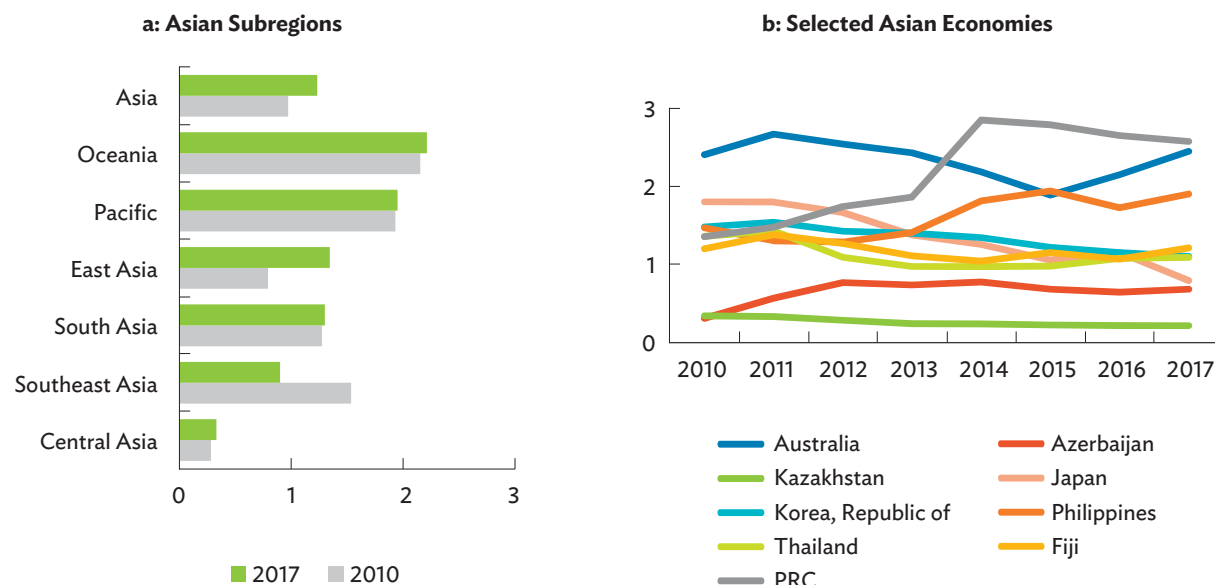
Source: United Nations World Tourism Organization (2019a); and World Bank. World Development Indicators. <https://databank.worldbank.org/source/world-development-indicators> (accessed August 2019).

**Table 4.3: Top Outbound Visitors to Asia**

Top Sources in 2017	Number (million, % share of total in parentheses)	Top Sources in 2010	Number (million, % share of total in parentheses)
<b>Within Asia</b>		<b>Within Asia</b>	
Hong Kong, China	86.3 (21.2%)	Hong Kong, China	82.0 (32.6%)
PRC	61.3 (15.0%)	PRC	22.2 (8.8%)
Korea, Republic of	21.8 (5.4%)	Japan	12.4 (4.9%)
Singapore	19.1 (4.7%)	Korea, Republic of	10.9 (4.3%)
Taipei, China	15.1 (3.7%)	Taipei, China	9.1 (3.6%)
<b>Outside Asia</b>		<b>Outside Asia</b>	
United States	13.1 (3.2%)	United States	9.0 (3.6%)
Russian Federation	10.0 (2.4%)	Russian Federation	6.0 (2.4%)
United Kingdom	6.9 (1.7%)	United Kingdom	5.2 (2.1%)
Germany	4.3 (1.0%)	Germany	3.0 (1.2%)
France	3.6 (0.9%)	France	2.6 (1.0%)

PRC = People's Republic of China.

Source: ADB calculations using data from United Nations World Tourism Organization. Tourism Satellite Accounts. <http://statistics.unwto.org/> (accessed April 2019).

**Figure 4.9: Tourism Expenditure per Outbound Tourist (\$ '000)**

PRC = People's Republic of China.

Sources: ADB calculations using data from United Nations World Tourism Organization, Tourism Satellite Accounts. <http://statistics.unwto.org/> (accessed April 2019); and World Bank, World Development Indicators. <https://databank.worldbank.org/source/world-development-indicators> (accessed August 2019).

(Figure 4.9a), with country-level data showing it was mostly driven by the PRC (Figure 4.9b).

The PRC and the Republic of Korea are good examples of economies with a rising propensity for tourism spending. In 2000, there were just 9.4 million international Chinese visitors. But increased per capita income and rising household wealth as the PRC continued its robust economic growth helped catapult its place up the global tourism ranks—in 2017, the PRC was the third top source of international arrivals, with 100.3 million outbound visitors, of which 61.1% traveled to Asia. The PRC remains a strong market mover, both as a tourist source and as destination. In 2017, tourists from the PRC spent \$258 billion on travel, more than six times the spending of Australian tourists (\$39.5 billion), for example, and almost eight times the spending of tourists from the Republic of Korea (\$33.4 billion). By 2028, the PRC's tourism sector is forecast to contribute 12.9% to GDP growth and contribute 116.5 million to total employment (World Travel and Tourism Council 2018). In the Republic of Korea, improved prosperity that accompanied its transformation to a high-income

country afforded more people to travel. Ranked as the 8th largest supplier of international visitors to the world, the number of arrivals from the Republic of Korea grew fivefold from 5.9 million in 2000 to 30.4 million in 2017. Around 70% of Korean visitors travel within Asia.

### **The PRC remained the most-visited country by Asian visitors in 2017, followed by Japan and Thailand.**

In 2010, the PRC (39.6%); Hong Kong, China (6.7%); Singapore (3.7%); Thailand (3.7%); and the Republic of Korea (2.7%) were the most popular destinations for visitors from Asia (Table 4.4). The US (3.2%) and the Russian Federation (3.4%) were the only two non-Asian countries among the top 10 destinations of visitors from Asia—but only the US was among the top 10 in 2017. The PRC remained the most-visited country intraregionally—drawing 118 million visitors in 2017, up 16.9% from 2010. Japan had around 4 times as many visitors from Asia in 2017 (25.1 million) as in 2010 (6.7 million)—while its rank rose from 8th to 2nd most

**Table 4.4: Top Destinations of Asian Visitors**

Top Destinations in 2017	Number (million, % share of total in parentheses)	Top Destinations in 2010	Number (million, % share of total in parentheses)
<b>Within Asia</b>		<b>Within Asia</b>	
PRC	117.9 (27.7%)	PRC	100.9 (39.6%)
Japan	25.1 (5.9%)	Hong Kong, China	17.1 (6.7%)
Thailand	25.1 (5.9%)	Singapore	9.5 (3.7%)
Hong Kong, China	24.8 (5.8%)	Thailand	9.4 (3.7%)
Malaysia	24.2 (5.7%)	Korea, Republic of	6.9 (2.7%)
<b>Outside Asia</b>		<b>Outside Asia</b>	
United States	13.8 (3.2%)	Russian Federation	8.6 (3.4%)
Russian Federation	8.8 (2.1%)	United States	8.1 (3.2%)
Saudi Arabia	6.7 (1.6%)	Turkey	2.8 (1.1%)
Turkey	5.2 (1.2%)	United Kingdom	2.5 (1.0%)
United Kingdom	3.6 (0.8%)	France	1.7 (0.7%)

PRC = People's Republic of China.

Source: ADB calculations using data from United Nations World Tourism Organization. Tourism Satellite Accounts. <http://statistics.unwto.org/> (accessed April 2019).

visited country. Japan adopted several travel facilitation measures to attract more international visitors, especially from the region. In the second half of 2018, Japan eased its travel visa requirements for India and the Philippines.

## Intra-Subregional Tourism

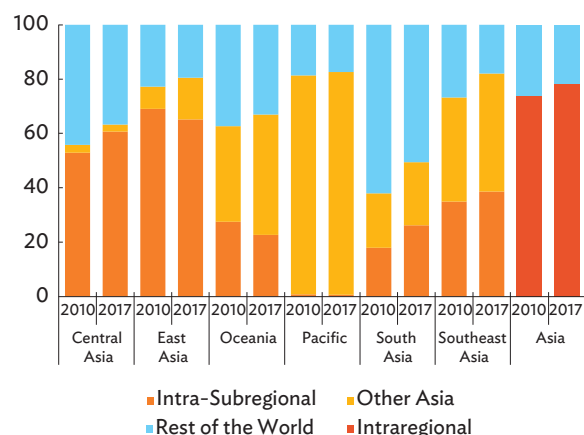
### Intraregional tourism in Asia rose during 2010–2017, while intra-subregional tourism varied.

In 2017, the share of intraregional visitors in Asia (against visitors globally) increased to 78.4% from 74.0% in 2010. Comparing intra-subregional tourism shares in 2010 and 2017 suggest that it has improved in Central Asia, South Asia, and Southeast Asia (Figure 4.10). Intra-subregional tourism share in Central Asia grew to 60.7% from 53.0% in 2010, as countries in the region began improving border control policies to support the easier movement of people, goods, and services, and promote stronger tourism. Kazakhstan, Tajikistan, and Uzbekistan reformed visa requirements and immediately saw an improvement in arrivals—intra-subregional arrivals grew

23.8% in Kazakhstan, 42.3% in Tajikistan, and 34.7% in Uzbekistan. Globally, Central Asia hosted 4.3 million more visitors in 2017—a 19-percentage point increase over the 2016 growth rate. South Asia received around 3.8 million intra-subregional visitors in 2017, with arrivals to India, Maldives, and Nepal climbing 32.7% over 2016. India's tourism strategy targets 15 million international tourists by 2025. Pakistan has recently introduced changes to its visa policy—50 countries are eligible to apply for a visa-on-arrival under the tourist category, while its online visa system is open to 175 countries.<sup>30</sup> Visitors from Southeast Asia have become more Asian-centric. Its shares of intra-subregional (38.7%) and inter-subregional (43.4%) tourism have grown relative to 2010. Intra-subregional visitors increased by around half a million in 2017, while inter-subregional arrivals recorded brisk growth (7.2 million visitors more than in 2016), especially Myanmar and Viet Nam. Meanwhile, countries in the Pacific have proportionally stronger tourism links with other Asian countries (particularly Oceania) rather than within the Pacific itself. In 2017, around 95% of the increase in arrivals to the Pacific were from Australia and New Zealand.

<sup>30</sup> Government of Pakistan, Ministry of Interior. <https://visa.nadra.gov.pk/> (accessed July 2019).

**Figure 4.10: Intra-Subregional Tourism Share—Asia**  
(% of total tourist arrivals to each subregion)



Source: ADB calculations using data from United Nations World Tourism Organization. Tourism Satellite Accounts. <http://statistics.unwto.org/> (accessed April 2019).

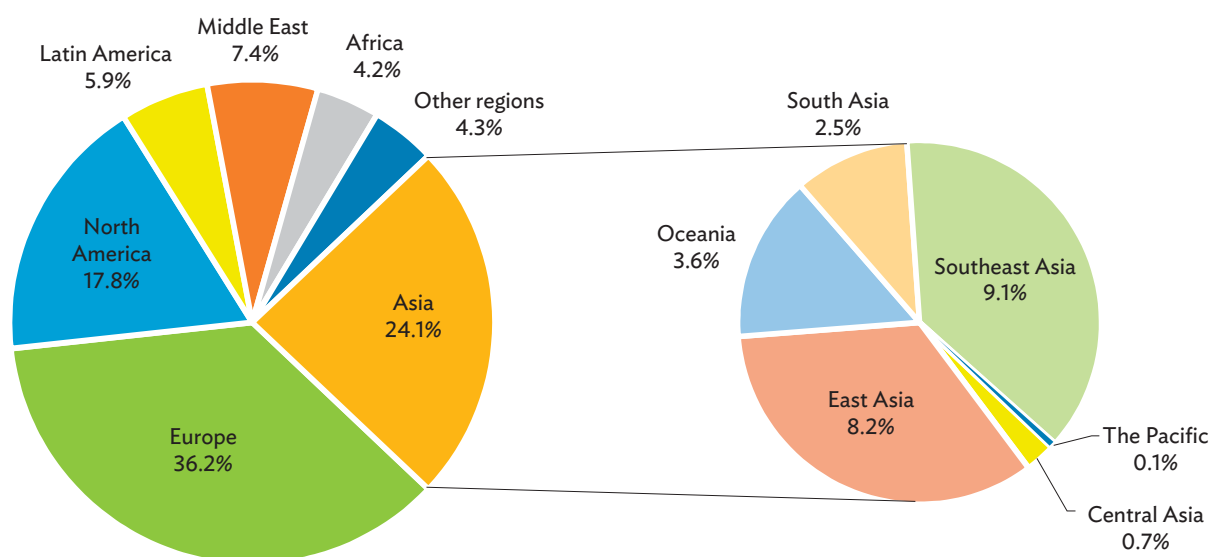
## International Tourism Receipts

**Asia's international tourism receipts grew 5.4% to a record \$368 billion in 2017, mirroring the steady growth of visitors to the region; significant tourism receipts make it a key source of income for many Pacific DMCs and Southeast Asian countries.**

Tourism's most visible economic impact is the significant financial inflows it generates—around \$1.5 trillion in visitor spending in 2017. It boosts physical and digital infrastructure investment, strengthens people-to-people linkages, promotes entrepreneurship, and stimulates employment, especially in emerging markets and developing Asia. In 2017, global tourism brought in \$1.5 trillion in international tourism receipts, a 7.3% growth over 2016. Globally, the largest share of tourism receipts went to Europe (36.2%), but in terms of year-on-year growth, Africa's 18.9% increase was a vast improvement—\$10.3 billion more than 2016 (Figure 4.11). Asia's 24% share remained steady in 2017, but tourism receipts grew 5.4% to \$368.0 billion.

The two Asian subregions that accounted for the largest shares of international arrivals also recorded the largest share of the region's tourism dollars—Southeast Asia (37.7%) and East Asia (34.0%) (Table 4.5). However, tourism receipts to East Asia fell by 8.7%, as the PRC and the Republic of Korea earned \$11.8 billion and \$4.2 billion less than in 2016. Central Asia, South Asia, Southeast Asia, and Oceania had double-digit growth rates in tourism receipts, as improved infrastructure, enhanced travel connectivity, and better travel facilitation measures continued to fan travel demand to the region.

**Figure 4.11: International Tourism Receipts by Region, 2017** (Total receipts = \$1.53 trillion)

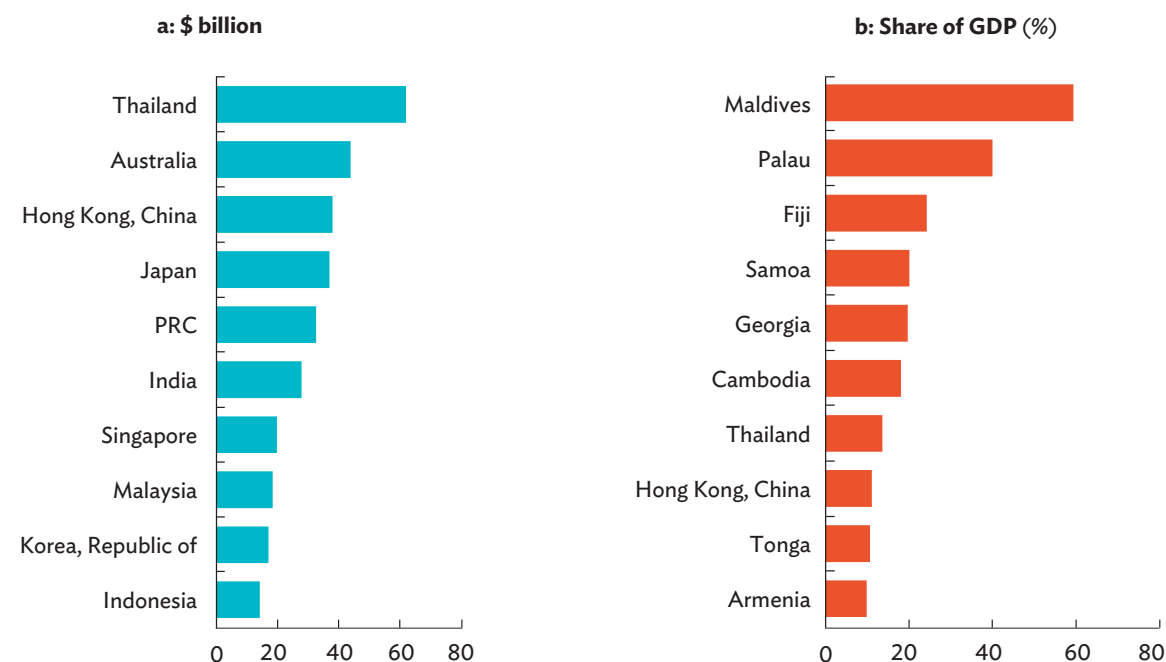


Sources: ADB calculations using data from United Nations World Tourism Organization (2019b); and World Bank. World Development Indicators. <https://databank.worldbank.org/source/world-development-indicators> (accessed October 2019).

**Table 4.5: Tourism Arrivals and Receipts in Asia by Subregion, 2017**

Subregion	International Tourism Receipts		International Arrivals	
	\$ million	% of Asia's total tourism receipts	million	% of international tourist arrivals to Asia
Central Asia	9,967	2.7	24.6	6.0
East Asia	125,096	34.0	234.0	57.4
Oceania	54,565	14.8	12.5	3.1
South Asia	37,902	10.3	14.4	3.5
Southeast Asia	138,820	37.7	120.4	29.5
The Pacific	1,693	0.5	1.6	0.4
<b>Total</b>	<b>368,042</b>	<b>100.0</b>	<b>407.6</b>	<b>100.0</b>

Sources: ADB calculations using data from United Nations World Tourism Organization. Tourism Satellite Accounts. <http://statistics.unwto.org/> (accessed April 2019); and World Bank. World Development Indicators. <https://databank.worldbank.org/source/world-development-indicators> (accessed October 2019).

**Figure 4.12: Top 10 Recipients of Tourism Receipts, 2017**

GDP = gross domestic product, PRC = People's Republic of China.

Note: 2017 data were not available for some economies with substantial tourist receipts (as share of GDP and in per capita terms).

Sources: ADB calculations using data from International Monetary Fund. World Economic Outlook October 2019 Database. <https://www.imf.org/external/pubs/ft/weo/2019/02/weodata/index.aspx> (accessed October 2019); United Nations World Tourism Organization. Tourism Satellite Accounts. <http://statistics.unwto.org/> (accessed April 2019); and World Bank. World Development Indicators. <https://databank.worldbank.org/source/world-development-indicators> (accessed October 2019).

By value, Thailand; Australia; and Hong Kong, China were the top recipients (Figure 4.12a). Thailand is the third most visited country by tourists from Asia, generating the most tourism income (\$62.2 billion) among countries in the region. Between 2016 and 2017,

the number of tourists to Thailand from the Republic of Korea and the PRC increased by 17.2% and 11.6%, respectively. Australia's tourism strategy generated nearly 20% more in international tourism receipts, making it the second largest recipient in 2017. Australia's



2017–2021 tourism strategy targets overnight visitor expenditure to reach \$115 billion in 2020 (Tourism Australia 2016). Japan’s tourism receipts grew 10.6% in 2017 to \$37.0 billion. In recent years, Japan has been using tourism as a revitalization strategy for its economy, leveraging its culture and history, diverse environment and cuisine—it has targeted 40 million tourists by 2020 and 60 million by 2030 (Government of Japan, Ministry of Land, Infrastructure, Transport and Tourism 2016).

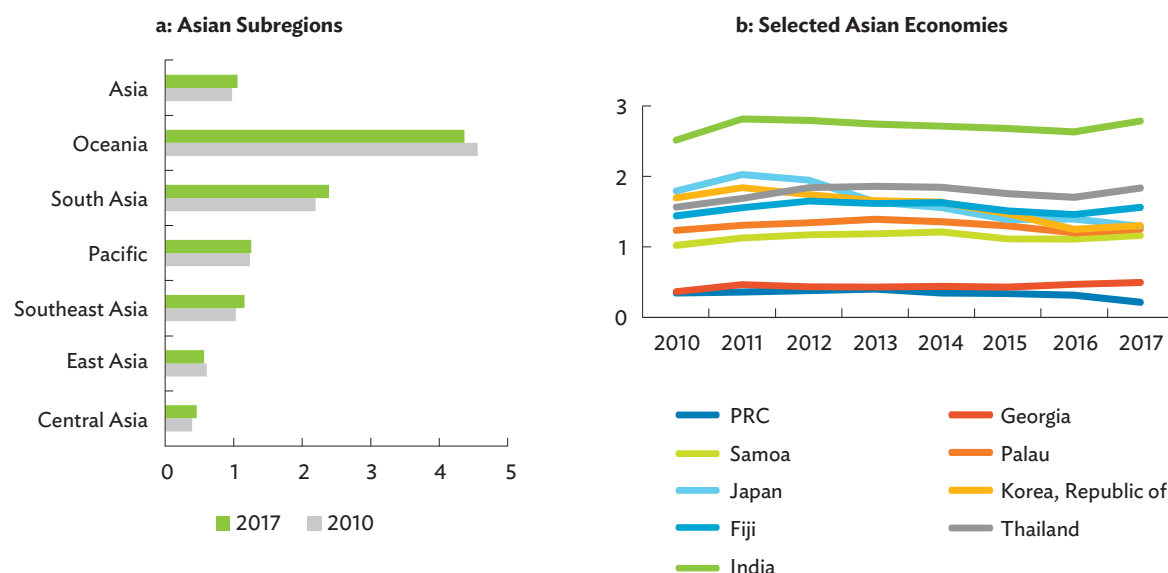
For several Pacific DMCs and countries in Southeast Asia and Central Asia, tourism is an important income source. Maldives tops the list—deriving 59.4% of its GDP from tourism (Figure 4.12b) and generating the highest tourism receipts per capita. Fiji and Samoa earned one-fifth of its GDP from tourism and were among the top 10 countries with the highest tourism receipts per capita. Cambodia’s tourism income as a proportion of GDP has grown considerably—to 18.1% in 2017—from about 3% of GDP in the mid-1990s. Central Asian countries Georgia and Armenia counted on tourism income for 19.7% and 9.9% of GDP, respectively. The economic contribution of tourism can also be assessed

by comparing it to outbound tourism expenditure as an indicator of net tourism earnings (Box 4.2).

### Asia earned \$903 per international visitor in 2017, while tourism receipts per arrival varied widely across subregions.

Asia earned \$903 per international visitor in 2017 (Figure 4.13a).<sup>31</sup> By subregion, Oceania earned the most per arrival in 2017 at \$4,370, about 5 times the average for Asia.<sup>32</sup> Second was South Asia at \$2,392 per arrival, higher by 9.1% compared with 2010. Earnings per arrival in Central Asia were lowest, reflecting the subregion’s nascent tourist industry. The steady average annual growth rate of 2.4%, higher than other subregions, could provide additional impetus to promote tourism in Central Asia. In East Asia, earnings per arrival declined, despite the large numbers of arrivals in the PRC, Japan, and the Republic of Korea (Figure 4.13b). Tourism receipts per arrival also rose in countries where tourism revenues matter most (both as a % of GDP and in per capita terms), especially in the Pacific.

**Figure 4.13: Tourism Receipts per Arrival (\$ ‘000)**



PRC = People’s Republic of China.

Sources: ADB calculations using data from United Nations World Tourism Organization (UNWTO). Tourism Satellite Accounts. <http://statistics.unwto.org/> (accessed March 2019); UNWTO (2019b); and World Bank. World Development Indicators. <https://databank.worldbank.org/source/world-development-indicators> (accessed August 2019).

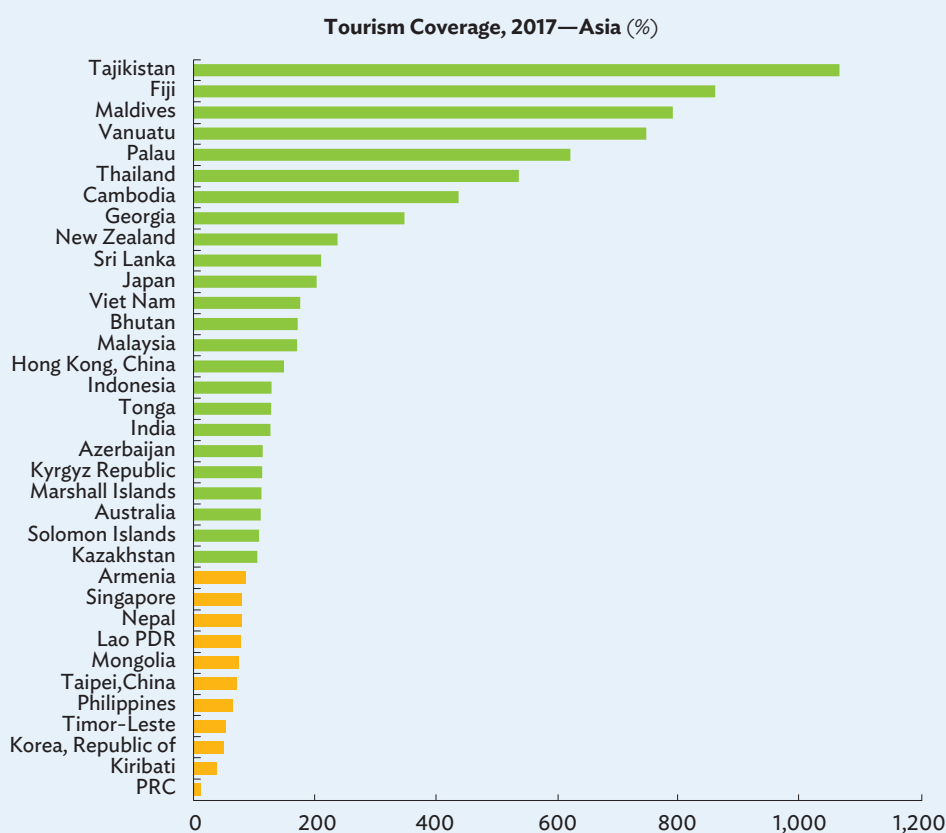
<sup>31</sup> Tourism receipts per tourist in Asia is estimated to be \$1,097 when only tourists (overnight visitors) are counted among inbound visitors to the PRC.

<sup>32</sup> The high level of tourism receipts per arrival in Oceania can be explained mainly by the many long-haul visitors who tend to stay longer and spend more. Higher prices in Australia and New Zealand are also a factor contributing to the high nominal level.

**Box 4.2: Tourism Coverage—A Measure of Net Tourism Earnings**

Tourism is increasingly used as an economic growth and development platform for its multiple economic impacts. As people visit another country, opportunities to earn from the exchange of goods, services, and money are set in motion. With growth and development from tourism comes greater average income, enabling households in a given economy the means to also experience outbound tourism. Eventually, economies that earn significant tourism revenues also spend for tourism—and over time, possibly spending as much, if not more, on their own tourism. The Box Figure on tourism coverage gives an overview of the extent to which foreign revenue inflows (from tourism receipts) cover for domestic revenue outflow (from outbound tourism). Computed as the proportion (expressed in %) of inbound international tourist expenditures to outbound tourist expenditures in foreign economies, a value higher than 100% means inbound tourism indirectly finances more than all outbound visitor expenditures.

For example, Sri Lanka's tourism coverage in 2017 suggests that it earned \$2.1 from inbound tourism for every dollar it spent on outbound tourism. Caution is required, however, in interpreting tourism coverage as a simple indicator of net gains from tourism. Analyzing tourism coverage in the proper context requires knowledge of the state of development of an economy's tourism industry. The Republic of Korea's tourism coverage is 51%, which suggests that the country's tourism expenditures exceeded its tourism receipts, but this is due to its robust outbound tourism industry—Koreans were among the most traveled in 2017. On the other hand, Tajikistan's coverage is 1066%, primarily because its outbound tourism market remains underdeveloped. Nonetheless, most economies with high tourism coverage rates are also those where tourism comprises a significant share of gross domestic product as well as high levels of tourism per capita, underscoring the importance of net tourism earnings.



Lao PDR = Lao People's Democratic Republic, PRC = People's Republic of China.

Note: Tourism coverage gives an overview of the extent to which foreign revenue inflows (from tourism receipts) cover for domestic revenue outflow (from outbound tourism).

Source: United Nations World Tourism Organization (2019a).

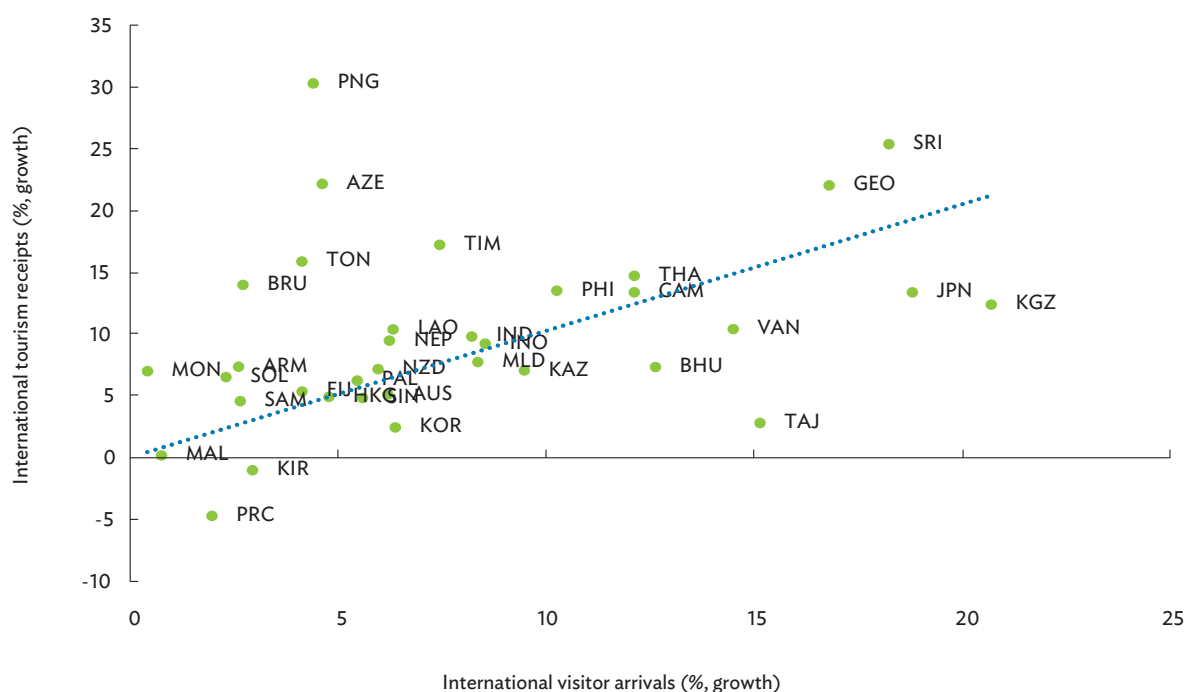
**The most visited countries are not necessarily those that earn most. National tourism strategies can focus more on maximizing visitor experience by offering high-value, quality experiences.**

Boosting tourist arrivals and maximizing tourism receipts are often simultaneous targets in national tourism plans but may not be achieved at the same time. Comparing the average annual growth rate of tourism receipts and international arrivals suggests the most-visited countries may not necessarily experience the same degree of growth in tourism earnings (Figure 4.14). For example, arrivals to Sri Lanka and Japan grew by almost the same rate from 2010 to 2017, but Sri Lanka's growth (25.4%)

in tourism earnings outpaced Japan's (13.4%). Average arrival growth in high-traffic countries such as the PRC and the Republic of Korea also exceeded the growth in their receipts, while in Indonesia and Cambodia receipts and arrivals grew at the same rate.

Tourism strategies that primarily target the development of hard infrastructure—such as aviation and mass transport, public facilities, and technology that eases immigration procedures—tend to attract more tourists as soon as the infrastructure are in place.<sup>33</sup> More airports and better public transport could make a country more accessible to tourists and cause arrivals to increase. But whether better infrastructure and greater tourism traffic translate into greater tourism gains depends on many

**Figure 4.14: Growth in International Tourist Receipts and Arrivals, 2010–2017**



ARM = Armenia; AUS = Australia; AZE = Azerbaijan; BHU = Bhutan; BRU = Brunei Darussalam; CAM = Cambodia; FIJ = Fiji; GEO = Georgia; HKG = Hong Kong, China; IND = India; INO = Indonesia; JPN = Japan; KAZ = Kazakhstan; KGZ = Kyrgyz Republic; KIR = Kiribati; KOR = Republic of Korea; LAO = Lao, People's Democratic Republic; MAL = Malaysia; MLD = Maldives; MON = Mongolia; NEP = Nepal; NZL = New Zealand; PAL = Palau; PNG = Papua New Guinea; PRC = People's Republic of China; PHI = Philippines; SAM = Samoa; SIN = Singapore; SOL = Solomon Islands; SRI = Sri Lanka; TAJ = Tajikistan; THA = Thailand; TIM = Timor-Leste; TON = Tonga; VAN = Vanuatu.

Note: Data represent the average annual growth rate for 2010–2017.

Sources: ADB calculations using data from United Nations World Tourism Organization. Tourism Satellite Accounts. <http://statistics.unwto.org/> (accessed April 2019); United Nations World Tourism Organization (2019b); and World Bank. World Development Indicators. <https://databank.worldbank.org/source/world-development-indicators> (accessed August 2019).

<sup>33</sup> UNWTO and GETRC (2016) reported that most countries in Asia enjoyed healthy growth in international arrivals, supported by increased capacity, air connectivity, and infrastructure development. In the Philippines, Catudan (2016) found infrastructure development directly related to an increase in tourist arrivals. In Singapore, infrastructure development has been a key component of its tourism master plans (Centre for Liveable Cities Singapore 2015). ADB has been supporting various climate-resilient and urban infrastructure projects to boost tourist arrivals and tourism investment across the region. For example, in Mongolia, it approved a \$38 million project in May 2019 to develop ecotourism in Khuvsgul Lake National Park and Onon-Balj National Park to serve as models for sustainable tourism, that is economically inclusive development and conservation.

factors. Tourism growth depends on the interaction of (i) tourism policy, regulatory environment, and strategy; (ii) infrastructure; (iii) human resources; and (iv) marketing and product development. It must consider the interests of multiple stakeholders—both public and private—and in other industries such as agriculture and transportation (ADB 2018). Cohesive execution of tourism strategies is key to maximizing tourism gains and ensuring sustainability.

### **New areas of regional cooperation could strengthen Asia's competitive advantage in tourism.**

Tourism's potential can be realized by attracting related investments, hastening rural infrastructure development, enhancing small and medium-sized enterprise business activity and expanding local employment. Regional tourism groups within the Association of Southeast Asian Nations (ASEAN) and the Greater Mekong Subregion (GMS)—stalwarts of tourism cooperation—are deeply committed to joint initiatives to expand tourism categories and travel packages that can sustainably support local community development and help induce tourism's poverty-reducing multiplier effects. ASEAN

members have liberalized air services under the ASEAN Single Aviation Market and the harmonization of air traffic operations via the Seamless ASEAN Sky to underscore support for promoting ASEAN as a single sustainable, inclusive, and balanced tourism destination (ASEAN 2019).<sup>34</sup> In the GMS Southern Economic Corridor (including Cambodia, the Lao People's Democratic Republic, Thailand, and Viet Nam), a key component of tourism cooperation is the development of private sector-driven community-based tourism models—promoted jointly and marketed using multicountry thematic routes and collaborative social media campaigns (ADB 2010 and Thraenhart 2018). CAREC countries—following in the footsteps of existing regional tourism cooperation bodies in Asia—have begun to streamline and harmonize visa regimes investigating a possible single CAREC visa, an idea floated to support tourism. As Asian economies continue to host more diverse groups of travelers from a variety of age groups, regional cooperation and integration measures may be modeled to encourage a multigenerational and sustainable focus on tourism—one that promotes shared prosperity, is shaped by modern technology, provides greater access to more efficient infrastructure, and attracts the growing number of people with the desire and means for seeing and experiencing the world.

<sup>34</sup> See the official ASEAN tourism website ([www.aseantravel.com](http://www.aseantravel.com)) for end-to-end information on different types of travel experiences across ASEAN's 10 members.

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**Table A10: Remittance Inflows Share—Asia, 2017** (% of total remittance inflows)

Reporter	Partner				
	Asia	Middle East	EU	US	ROW
<b>Central Asia</b>	<b>7.3</b>	<b>1.1</b>	<b>8.0</b>	<b>2.6</b>	<b>81.0</b>
Armenia	4.4	0.4	10.5	13.8	70.8
Azerbaijan	24.1	4.0	3.4	2.0	66.4
Georgia	9.2	2.7	16.8	2.4	69.0
Kazakhstan	4.2	0.7	22.2	0.8	72.2
Kyrgyz Republic	4.7	0.9	12.8	0.6	80.9
Tajikistan	12.8	0.4	4.2	0.9	81.7
Turkmenistan	0.0	0.0	0.0	0.0	100.0
Uzbekistan	0.0	0.0	0.0	0.0	100.0
<b>East Asia</b>	<b>50.9</b>	<b>0.1</b>	<b>9.0</b>	<b>27.4</b>	<b>12.6</b>
China, People's Republic of	52.7	0.1	9.0	25.3	12.9
Hong Kong, China	22.6	0.0	11.6	30.8	35.0
Japan	39.7	0.3	13.1	34.8	12.1
Korea, Republic of	43.4	0.0	4.5	44.8	7.3
Mongolia	45.1	0.4	20.0	0.3	34.3
Taipei, China	–	–	–	–	–
<b>South Asia</b>	<b>15.2</b>	<b>58.6</b>	<b>9.5</b>	<b>12.0</b>	<b>4.6</b>
Afghanistan	31.6	56.5	8.0	2.1	1.8
Bangladesh	36.2	54.1	5.5	3.3	0.9
Bhutan	97.0	0.0	1.8	0.2	1.0
India	13.0	55.8	8.7	17.0	5.5
Maldives	58.0	1.3	12.7	0.0	28.0
Nepal	21.4	70.4	3.0	4.8	0.4
Pakistan	5.4	70.2	14.0	6.7	3.7
Sri Lanka	17.0	51.3	19.1	3.1	9.5
<b>Southeast Asia</b>	<b>26.2</b>	<b>23.8</b>	<b>10.3</b>	<b>32.4</b>	<b>7.3</b>
Brunei Darussalam	–	–	–	–	–
Cambodia	68.8	0.0	7.4	20.8	3.0
Indonesia	40.0	51.6	4.6	2.8	1.1
Lao PDR	74.6	0.0	4.2	19.5	1.8
Malaysia	89.3	0.0	4.3	3.8	2.6
Myanmar	66.4	27.1	0.7	5.4	0.4
Philippines	18.3	31.6	7.1	33.8	9.1
Singapore	–	–	–	–	–
Thailand	37.1	4.1	25.2	27.6	6.0
Viet Nam	19.6	0.0	15.6	56.1	8.6
<b>The Pacific</b>	<b>59.3</b>	<b>0.0</b>	<b>1.9</b>	<b>26.1</b>	<b>12.6</b>
Cook Islands	–	–	–	–	–
Fiji	59.7	0.0	3.2	23.1	14.1
Kiribati	50.7	0.0	0.8	46.5	2.0
Marshall Islands	2.5	0.0	0.2	94.3	3.0
Micronesia, Federated States of	1.6	0.0	0.0	71.8	26.5
Nauru	–	–	–	–	–
Niue	–	–	–	–	–
Palau	7.1	0.0	0.4	56.0	36.5
Papua New Guinea	89.3	0.9	1.1	7.7	0.9
Samoa	64.3	0.0	0.2	12.5	23.0
Solomon Islands	88.8	0.1	2.1	4.4	4.5
Timor-Leste	93.7	0.0	5.9	0.0	0.4
Tonga	57.1	0.0	0.3	39.3	3.3
Tuvalu	77.2	0.2	1.3	5.1	16.1
Vanuatu	21.2	0.0	10.2	2.1	66.6
<b>Oceania</b>	<b>38.5</b>	<b>1.4</b>	<b>37.5</b>	<b>13.4</b>	<b>9.2</b>
Australia	31.5	1.6	41.8	14.9	10.2
New Zealand	84.1	0.1	9.2	3.9	2.7
<b>Asia</b>	<b>27.7</b>	<b>30.9</b>	<b>9.7</b>	<b>20.8</b>	<b>11.0</b>
<b>Developing Asia</b>	<b>27.4</b>	<b>31.7</b>	<b>9.4</b>	<b>20.6</b>	<b>10.9</b>

– = unavailable, EU = European Union, Lao PDR = Lao People's Democratic Republic, ROW = rest of the world, US = United States.

Source: ADB calculations using data from World Bank. World Bank Migration and Remittances Data. <http://www.worldbank.org/en/topic/migrationremittancesdiasporaissues/brief/migration-remittances-data> (accessed April 2019).

**Table A11: Outbound Migration Share—Asia, 2017** (% of total outbound migrants)

Reporter	Partner					
	Asia	of which		EU	US	ROW
		PRC	Japan			
<b>Central Asia</b>	<b>9.6</b>	<b>0.0</b>	<b>0.0</b>	<b>14.8</b>	<b>2.3</b>	<b>73.4</b>
Armenia	19.4	0.0	0.0	8.7	9.7	62.2
Azerbaijan	14.7	0.0	0.0	3.6	1.8	80.0
Georgia	11.8	0.0	0.0	20.0	3.2	65.0
Kazakhstan	1.4	0.0	0.0	26.2	0.7	71.8
Kyrgyz Republic	3.7	0.0	0.0	12.4	0.8	83.1
Tajikistan	5.9	0.0	0.0	5.7	0.8	87.6
Turkmenistan	2.5	0.0	0.0	4.2	0.9	92.3
Uzbekistan	21.7	0.0	0.0	3.7	3.0	71.6
<b>East Asia</b>	<b>47.0</b>	<b>3.3</b>	<b>9.2</b>	<b>9.4</b>	<b>29.1</b>	<b>14.5</b>
China, People's Republic of	51.5		7.4	10.0	24.0	14.5
Hong Kong, China	40.8	25.1	0.0	9.3	22.3	27.6
Japan	22.7	0.8		17.1	44.3	15.9
Korea, Republic of	40.1	7.6	23.7	4.0	48.0	7.9
Mongolia	39.0	0.0	0.0	25.8	0.0	35.2
Taipei, China	0.0	0.0	0.0	0.0	0.0	0.0
<b>South Asia</b>	<b>29.1</b>	<b>0.1</b>	<b>0.2</b>	<b>8.4</b>	<b>8.0</b>	<b>54.4</b>
Afghanistan	32.5	0.0	0.0	6.4	1.5	59.6
Bangladesh	48.9	0.1	0.1	5.1	2.9	43.1
Bhutan	89.1	0.0	0.0	4.0	0.0	7.0
India	19.7	0.1	0.2	7.5	13.5	59.4
Maldives	75.3	0.0	0.0	14.9	0.0	9.8
Nepal	50.8	0.0	0.0	5.4	6.1	37.7
Pakistan	24.3	0.1	0.2	14.0	6.2	55.5
Sri Lanka	20.8	0.3	0.6	21.4	3.1	54.7
<b>Southeast Asia</b>	<b>46.9</b>	<b>0.8</b>	<b>2.0</b>	<b>7.7</b>	<b>21.3</b>	<b>24.1</b>
Brunei Darussalam	77.0	0.0	0.0	12.1	0.0	11.0
Cambodia	71.0	0.0	0.3	6.6	16.2	6.1
Indonesia	42.8	1.0	0.7	4.3	2.4	50.4
Lao PDR	79.5	0.0	0.0	3.8	16.2	0.5
Malaysia	89.1	0.3	0.5	4.7	3.7	2.6
Myanmar	84.5	0.0	0.0	0.7	4.6	10.2
Philippines	15.8	1.3	4.2	8.7	36.8	38.7
Singapore	65.3	0.0	0.8	18.2	10.9	5.6
Thailand	34.5	1.7	5.2	26.7	29.2	9.5
Viet Nam	24.6	1.1	3.1	15.0	51.9	8.6
<b>The Pacific</b>	<b>64.7</b>	<b>0.0</b>	<b>0.0</b>	<b>2.8</b>	<b>19.1</b>	<b>13.4</b>
Cook Islands	99.9	0.0	0.0	0.0	0.0	0.0
Fiji	62.4	0.0	0.0	2.8	21.4	13.4
Kiribati	94.4	0.0	0.0	3.4	0.0	2.2
Marshall Islands	1.8	0.0	0.0	0.1	94.2	3.9
Micronesia, Federated States of	3.1	0.0	0.0	0.7	38.2	58.0
Nauru	96.3	0.0	0.0	1.2	0.0	2.5
Niue	99.3	0.0	0.0	0.0	0.0	0.7
Palau	12.2	0.0	0.0	7.4	0.0	80.4
Papua New Guinea	49.5	0.0	0.0	30.8	0.0	19.7
Samoa	69.9	0.0	0.0	0.7	15.7	13.8
Solomon Islands	91.3	0.0	0.0	8.4	0.0	0.3
Timor-Leste	89.7	0.0	0.0	10.1	0.0	0.2
Tonga	62.7	0.0	0.0	0.7	32.1	4.6
Tuvalu	78.1	0.0	0.0	1.9	0.0	20.0
Vanuatu	23.0	0.0	0.0	11.5	0.0	65.5
<b>Oceania</b>	<b>61.3</b>	<b>0.4</b>	<b>1.0</b>	<b>23.7</b>	<b>8.8</b>	<b>6.2</b>
Australia	26.9	1.0	1.9	45.5	16.2	11.4
New Zealand	83.6	0.0	0.4	9.6	4.0	2.7
<b>Asia</b>	<b>34.7</b>	<b>0.8</b>	<b>2.1</b>	<b>9.4</b>	<b>14.1</b>	<b>41.7</b>
<b>Developing Asia</b>	<b>34.4</b>	<b>0.8</b>	<b>2.1</b>	<b>9.1</b>	<b>13.9</b>	<b>42.6</b>

– = unavailable, EU = European Union, Lao PDR = Lao People's Democratic Republic, PRC = People's Republic of China, ROW = rest of the world, US = United States.

Source: ADB calculations using data from United Nations. Department of Economic and Social Affairs, Population Division. International Migrant Stock 2017. <http://www.un.org/en/development/desa/population/migration/data/index.shtml> (accessed July 2018).

**Table A12.a: Inbound Visitor Share—Asia, 2017** (% of total inbound visitors)

Destination	Origin				
	Asia	of which PRC	EU	US	ROW
<b>Central Asia</b>	<b>63.3</b>	<b>0.8</b>	<b>3.3</b>	<b>0.8</b>	<b>32.7</b>
Armenia	9.2	1.1	21.0	17.5	52.3
Azerbaijan	25.3	0.4	4.0	0.6	70.2
Georgia	46.2	0.3	4.7	0.6	48.6
Kazakhstan	70.6	1.2	2.9	0.4	26.1
Kyrgyz Republic	86.1	0.8	1.0	0.3	12.6
Tajikistan	57.8	1.5	3.0	0.7	38.6
Turkmenistan	–	–	–	–	–
Uzbekistan	91.9	0.6	0.8	0.0	7.2
<b>East Asia</b>	<b>80.5</b>	<b>14.1</b>	<b>2.8</b>	<b>2.6</b>	<b>14.1</b>
China, People's Republic of	76.9	–	2.1	1.5	19.5
Hong Kong, China	88.3	66.0	4.4	3.1	4.2
Japan	87.6	25.7	4.7	4.8	2.9
Korea, Republic of	82.9	31.9	4.6	6.7	5.9
Mongolia	60.1	30.4	9.6	3.6	26.7
Taipei, China	90.8	25.8	2.4	5.3	1.5
<b>South Asia</b>	<b>49.4</b>	<b>6.5</b>	<b>24.5</b>	<b>10.8</b>	<b>15.3</b>
Afghanistan	–	–	–	–	–
Bangladesh	–	–	–	–	–
Bhutan	54.0	10.3	21.9	14.8	9.3
India	48.5	2.5	21.5	13.8	16.3
Maldives	44.7	22.1	36.4	2.8	16.0
Nepal	64.8	11.8	20.3	8.9	6.0
Pakistan	–	–	–	–	–
Sri Lanka	50.4	12.8	32.7	2.7	14.2
<b>Southeast Asia</b>	<b>82.0</b>	<b>21.0</b>	<b>9.1</b>	<b>3.4</b>	<b>5.5</b>
Brunei Darussalam	88.9	20.5	7.7	1.6	1.7
Cambodia	77.3	21.8	13.0	4.6	5.0
Indonesia	80.7	17.4	12.7	2.9	3.7
Lao PDR	94.8	16.7	3.2	1.0	1.0
Malaysia	93.2	8.8	3.7	0.8	2.3
Myanmar	90.6	29.6	6.3	2.2	1.0
Philippines	69.0	15.1	8.6	15.0	7.4
Singapore	85.3	19.1	8.3	3.4	3.1
Thailand	74.0	29.1	12.9	3.0	10.1
Viet Nam	80.0	32.7	8.7	5.0	6.3
<b>The Pacific</b>	<b>82.7</b>	<b>8.6</b>	<b>5.1</b>	<b>8.4</b>	<b>3.8</b>
Cook Islands	85.3	0.5	6.3	5.3	3.1
Fiji	81.5	6.4	5.6	10.7	2.2
Kiribati	51.0	3.3	9.8	36.7	2.5
Marshall Islands	35.6	–	0.7	61.0	2.6
Micronesia, Federated States of	–	–	–	–	–
Nauru	–	–	–	–	–
Niue	95.7	0.0	1.7	2.6	0.0
Palau	89.9	47.6	2.9	6.2	1.1
Papua New Guinea	85.6	8.1	6.9	6.3	1.2
Samoa	77.5	1.8	1.9	7.5	13.2
Solomon Islands	86.8	5.9	4.4	7.9	0.9
Timor-Leste	82.3	13.0	12.9	3.5	1.2
Tonga	81.4	2.7	3.8	14.1	0.8
Tuvalu	76.7	6.4	6.2	14.5	2.6
Vanuatu	82.3	4.0	1.2	0.0	17.7
<b>Oceania</b>	<b>67.0</b>	<b>14.2</b>	<b>16.4</b>	<b>8.9</b>	<b>7.7</b>
Australia	66.1	15.4	17.1	8.9	7.9
New Zealand	69.1	11.4	14.7	9.0	7.2
<b>Asia</b>	<b>78.4</b>	<b>15.0</b>	<b>5.9</b>	<b>3.2</b>	<b>12.5</b>
<b>Developing Asia</b>	<b>78.1</b>	<b>14.2</b>	<b>5.6</b>	<b>2.9</b>	<b>13.4</b>

– = unavailable, EU = European Union, Lao PDR = Lao People's Democratic Republic, PRC = People's Republic of China, ROW = rest of the world, US = United States.

Source: ADB calculations using data from United Nations World Tourism Organization. Tourism Satellite Accounts. <http://statistics.umwto.org> (accessed April 2019).

**Table A12.b: Outbound Visitor Share—Asia, 2017** (% of total outbound visitors)

Origin	Destination				
	Asia	of which PRC	EU	US	ROW
<b>Central Asia</b>	<b>56.1</b>	<b>1.3</b>	<b>0.9</b>	<b>0.2</b>	<b>42.8</b>
Armenia	64.2	0.3	1.3	0.6	34.0
Azerbaijan	35.0	0.3	0.7	0.2	64.1
Georgia	17.7	0.3	2.6	0.1	79.6
Kazakhstan	55.2	2.5	0.9	0.3	43.6
Kyrgyz Republic	76.7	1.5	0.1	0.1	23.1
Tajikistan	70.5	1.6	0.1	0.1	29.3
Turkmenistan	30.3	2.5	0.4	0.2	69.1
Uzbekistan	86.2	0.9	0.4	0.2	13.2
<b>East Asia</b>	<b>74.9</b>	<b>35.2</b>	<b>5.8</b>	<b>3.6</b>	<b>15.7</b>
China, People's Republic of	61.1		8.2	3.2	27.6
Hong Kong, China	92.5	85.6	0.3	0.2	7.0
Japan	59.2	11.6	14.9	15.6	10.3
Korea, Republic of	71.9	12.7	8.9	7.7	11.5
Mongolia	82.4	74.5	0.1	0.5	17.0
Taipei, China	84.4	32.8	4.7	2.7	8.3
<b>South Asia</b>	<b>49.2</b>	<b>5.4</b>	<b>8.0</b>	<b>6.3</b>	<b>36.4</b>
Afghanistan	18.2	1.3	1.1	0.2	80.5
Bangladesh	85.5	2.8	0.5	1.0	13.0
Bhutan	96.2	1.4	1.1	1.1	1.7
India	48.6	6.2	12.7	9.7	28.9
Maldives	94.3	3.0	0.2	0.1	5.3
Nepal	86.8	24.6	0.7	5.9	6.6
Pakistan	12.5	3.3	3.1	2.4	82.0
Sri Lanka	85.3	6.9	1.3	2.5	10.8
<b>Southeast Asia</b>	<b>92.5</b>	<b>24.5</b>	<b>1.3</b>	<b>1.0</b>	<b>5.2</b>
Brunei Darussalam	99.4	0.4	0.0	0.1	0.5
Cambodia	98.5	4.7	0.1	0.4	1.1
Indonesia	79.9	6.2	1.6	1.0	17.5
Lao PDR	99.9	30.4	0.1	0.0	0.1
Malaysia	91.1	9.8	2.0	0.6	6.3
Myanmar	99.7	91.5	0.0	0.1	0.2
Philippines	80.9	17.2	2.5	4.6	12.0
Singapore	95.9	4.7	1.5	0.7	1.9
Thailand	92.6	7.2	1.6	1.0	4.8
Viet Nam	97.9	56.1	0.1	1.0	0.9
<b>The Pacific</b>	<b>84.1</b>	<b>4.0</b>	<b>0.3</b>	<b>3.5</b>	<b>12.0</b>
Cook Islands	95.7	0.0	0.2	0.4	3.7
Fiji	88.5	4.3	0.4	6.4	4.7
Kiribati	90.9	31.7	0.4	2.9	5.7
Marshall Islands	42.9	12.9	0.8	4.4	52.0
Micronesia, Federated States of	9.6	1.8	0.4	2.8	87.2
Nauru	92.1	3.9	1.6	1.8	4.5
Niue	95.7	0.0	0.2	0.9	3.2
Palau	11.5	1.7	0.6	3.2	84.7
Papua New Guinea	96.4	2.3	0.1	1.1	2.4
Samoa	77.9	4.2	0.1	0.0	22.0
Solomon Islands	91.2	6.4	1.0	1.7	6.1
Timor-Leste	93.7	6.9	0.9	1.1	4.3
Tonga	89.1	3.5	0.2	9.3	1.4
Tuvalu	81.0	10.3	1.1	2.6	15.4
Vanuatu	81.6	3.1	0.4	0.6	17.4
<b>Oceania</b>	<b>58.2</b>	<b>4.4</b>	<b>23.5</b>	<b>8.2</b>	<b>10.2</b>
Australia	54.7	4.5	26.3	8.2	10.8
New Zealand	73.4	3.9	11.2	8.0	7.4
<b>Asia</b>	<b>75.1</b>	<b>27.7</b>	<b>5.5</b>	<b>3.2</b>	<b>16.2</b>
<b>Developing Asia</b>	<b>76.9</b>	<b>29.9</b>	<b>4.0</b>	<b>2.2</b>	<b>16.9</b>

– = unavailable, EU = European Union, Lao PDR = Lao People's Democratic Republic, PRC = People's Republic of China, ROW = rest of the world, US = United States.

Source: ADB calculations using data from United Nations World Tourism Organization. Tourism Satellite Accounts. <http://statistics.unwto.org> (accessed April 2019).