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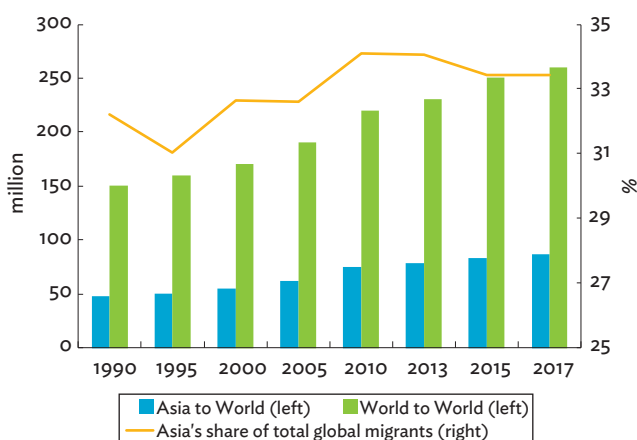
Movement of People



Migration

The stock of international migrants worldwide increased by 4.0% from 247.7 million in 2015 to 257.7 million in 2017 (Figure 5.1).²⁵ Over the same period, the global stock of migrants from Asia grew by 3.9%—from 83.6 million to 86.9 million. Inward migration to the region grew by 1.4%—from 41.8 million to 42.4 million.²⁶

Figure 5.1: International Migrant Stock and Share of Migrants from Asia



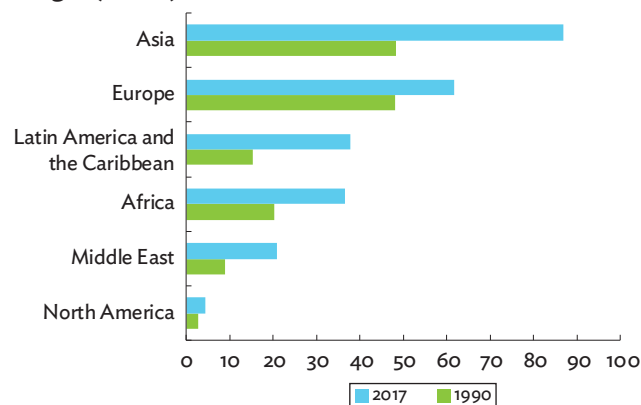
Note: Asia's share of total global migrants is computed as the percentage of migrants from the region (Asia to World) to total global migrants (World to World).

Source: ADB calculations using data from United Nations. Department of Economic and Social Affairs, Population Division. International Migrant Stock: The 2017 Revision. <http://www.un.org/en/development/desa/population/migration/data/estimates2/estimates17.shtml> (accessed May 2018).

Asia remains the largest source of international migrants.

One in three migrants (33.4%) worldwide comes from Asia. The stock of Asian migrants grew by 79.8% from 1990 to 2017 (from 48.3 million to 86.9 million) (Figure 5.2). European migrants grew by only 28.0% (from 48.1 million to 61.6 million), decreasing its share from 32.1% to 23.7% over the same period. Countries with sustained population growth and an expanding workforce continued to lead outward migration, while rising income levels and improved regulatory efficiency has helped bring down the cost of overseas worker migration. Rapidly aging populations in many developed

Figure 5.2: International Migrants, by Region of Origin (million)



Source: ADB calculations using data from United Nations. Department of Economic and Social Affairs, Population Division. International Migrant Stock: The 2017 Revision. <http://www.un.org/en/development/desa/population/migration/data/estimates2/estimates17.shtml> (accessed May 2018).

²⁵ The United Nations (UN) recommendations on statistics of international migration define the “stock of international migrants present in a country” as “the set of persons who have ever changed their country of usual residence, that is to say, persons who have spent at least one year of their lives in a country other than the one in which they live at the time the data are gathered” (UN 1998). International migrant stock consists of persons crossing borders for various reasons—for employment, family reunification, study, and fleeing from conflicts and violence. Some events involve the creation of new borders, generating large numbers of international migrants—as during the 1991 dissolution of the Soviet Union.

²⁶ Asia refers to the 48 Asia and the Pacific members of the Asian Development Bank (ADB), which includes Japan and Oceania (Australia and New Zealand) in addition to the 45 developing Asian economies. In this chapter, Oceania and the Pacific are treated separately to underscore the distinct pattern and nuances of migration, remittance, and tourism movements in each of these two subregions.

host countries create labor shortages that contribute to rising demand for migrant labor.

Outward migration outpaces inward migration in Asia.

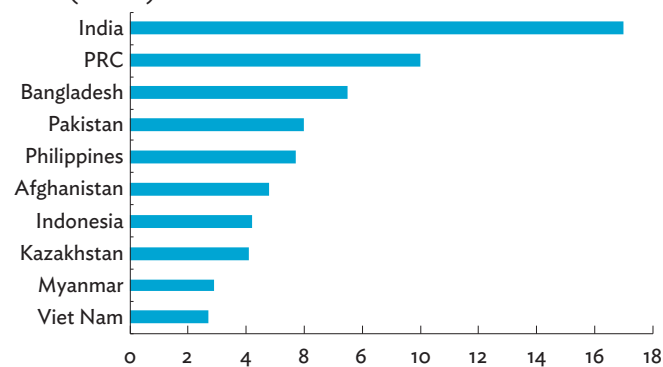
The stock of Asian migrants across the world has grown faster than the number of migrants residing in the region—particularly over the past several years. Migrants to Asia peaked in 2013 at 43.1 million, declining to 41.8 million in 2015, and increasing somewhat in 2017 (Figure 5.3). Major source countries of migrants to Asia are the People's Republic of China (PRC) (5.2 million), the Russian Federation (3.8 million), and Bangladesh (3.7 million) while the major hosts of migrants in Asia are Australia (7.1 million), India (5.2 million), and Kazakhstan (3.6 million). By contrast, outward migration has steadily increased, especially those headed outside Asia. Major host countries for Asian migrants are the United States (US) (12.3 million), Saudi Arabia (8.5 million), and the Russian Federation (6.8 million).

The largest numbers of outward migrants come from India, the PRC, and Bangladesh, while the migration rate is highest in Pacific and Central Asian subregions.

India had the most outward migrants in 2017 (17.0 million), followed by the PRC (10.0 million) and Bangladesh (7.5 million) (Figure 5.4). By subregion,

South Asia and Southeast Asia dominate the list. By ratio of total outward migrants to population, the Pacific developing member countries (Pacific DMCs) top the list. Cook Islands outward migrants total 128.0% of the population (22,249 migrants against a population of 17,380),²⁷ followed by Samoa (59.8%) and Tonga (55.8%) (Figure 5.5). In 2017, 57.3% of migrants from the Pacific DMCs went to Australia and New Zealand. Most Central Asian migrants move to the Russian Federation (63.3%). As expected, the ratios for the world's most populous countries with the largest absolute number of migrants remain very low—India (1.3%) and the PRC (0.7%).

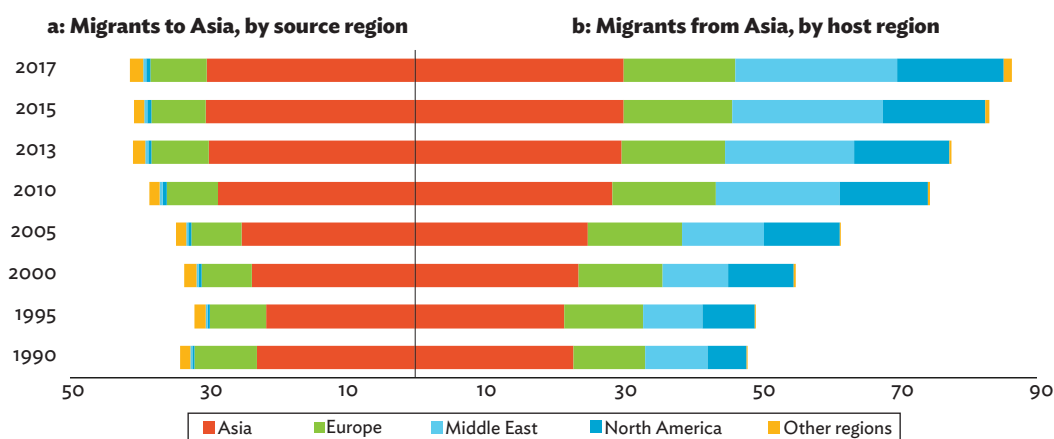
Figure 5.4: Top 10 Sources of Migrants, 2017—Asia (million)



PRC = People's Republic of China.

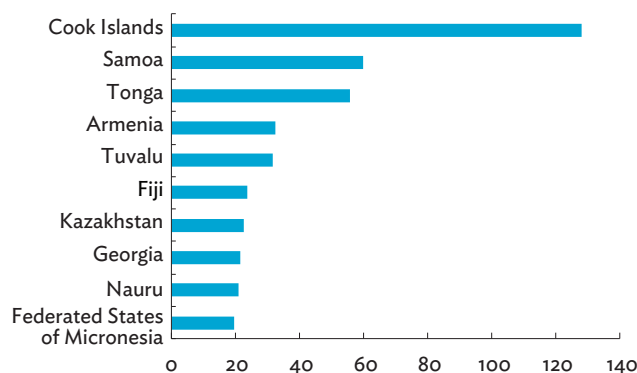
Source: ADB calculations using data from United Nations. Department of Economic and Social Affairs, Population Division. International Migrant Stock: The 2017 Revision. <http://www.un.org/en/development/desa/population/migration/data/estimates2/estimates17.shtml> (accessed May 2018).

Figure 5.3: Migration to and from Asia, by Region (million)



Source: ADB calculations using data from United Nations. Department of Economic and Social Affairs, Population Division. International Migrant Stock: The 2017 Revision. <http://www.un.org/en/development/desa/population/migration/data/estimates2/estimates17.shtml> (accessed May 2018).

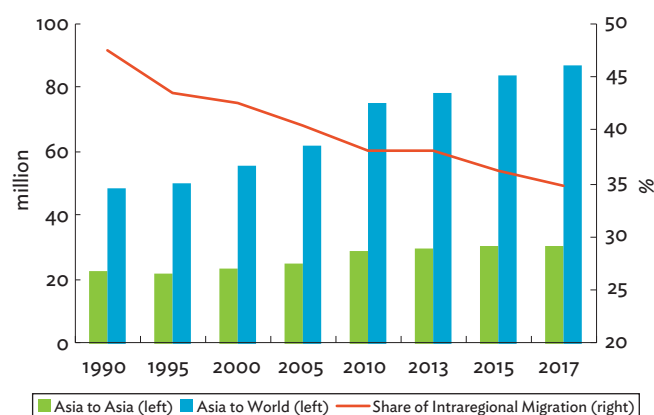
²⁷ The reason for the high ratio is because Cook Islands nationals are concurrently citizens of New Zealand and they are able to live and work in New Zealand without restriction.

Figure 5.5: Top 10 Ratios of Outward Migrants to Population, 2017—Asia (%)

Sources: ADB calculations using data from United Nations, Department of Economic and Social Affairs, Population Division. International Migrant Stock: The 2017 Revision. <http://www.un.org/en/development/desa/population/migration/data/estimates2/estimates17.shtml> (accessed May 2018); and United Nations, Department of Economic and Social Affairs, Population Division (2017).

Intraregional migration remains important, but it has fallen slightly in recent years.

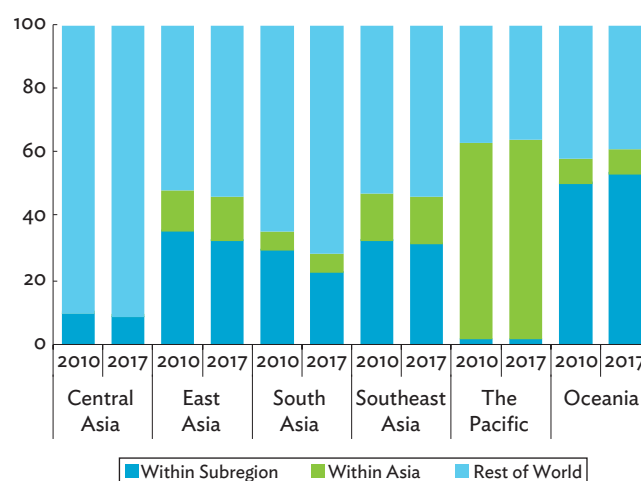
Intraregional migration remains an important part of international migration from the region, with 33.4% of migrants from Asia staying within the region (Figure 5.6); and 71.3% of all international migrants to Asia originating from within the region. Major host economies for intraregional migration include India (5.0 million); Thailand (3.5 million); Pakistan (3.4 million); Australia (3.2 million); and Hong Kong, China (2.7 million).

Figure 5.6: International Migration Trend—Asia

Note: Share of intraregional migration is estimated as percentage of Asia's intraregional migrants (Asia to Asia) to total migrants from Asia (Asia to World). Source: ADB calculations using data from United Nations, Department of Economic and Social Affairs, Population Division. International Migrant Stock: The 2017 Revision. <http://www.un.org/en/development/desa/population/migration/data/estimates2/estimates17.shtml> (accessed May 2018).

Intraregional migrants to India largely come from neighboring countries such as Bangladesh (3.1 million), Pakistan (1.1 million), and Nepal (0.5 million). Similarly, Thailand hosted migrants from Myanmar (1.8 million), the Lao People's Democratic Republic (0.9 million), and Cambodia (0.7 million); and to Pakistan largely from either India (1.9 million) or Afghanistan (1.5 million). On the other hand, major sources of intraregional migrants are the PRC (5.2 million), Bangladesh (3.7 million), India (3.3 million), Myanmar (2.4 million), and Indonesia (1.8 million). The proportion of intraregional migration to total outward migration declined over the years—from 47.5% in 1990 to 34.7% in 2017. The absolute number of Asian migrants staying within the region during 2015–2017 also dropped slightly—from 30.24 million to 30.18 million.

By subregion, some 90.4% of Central Asian migrants move outside the region, mostly to the Russian Federation (Figure 5.7). Intraregional migration remains high in the Pacific DMCs (60.7% in 2010, 61.9% in 2017). The share of South Asian migrants residing outside the subregion increased from 64.5% (2010) to 70.6% (2017), primarily due to increased migration to the Middle East.

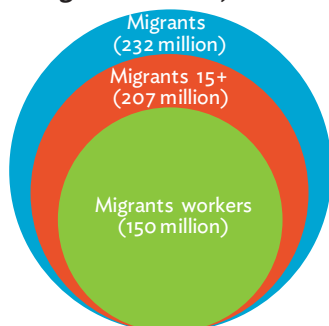
Figure 5.7: Migration from Asia, by Subregions (% of total outward migrants)

Notes:

- Within subregion refers to migrants from subregion *i* as a percentage of migrants from subregion *i* to world.
- Within Asia refers to the migrants from subregion *i* to other Asian subregions as a percentage of migrants from subregion *i* to world.
- Rest of the World refers to migrants from subregion *i* to the rest of the world as a percentage of migrants from subregion *i* to world.

Source: ADB calculations using data from United Nations, Department of Economic and Social Affairs, Population Division. International Migrant Stock: The 2017 Revision. <http://www.un.org/en/development/desa/population/migration/data/estimates2/estimates17.shtml> (accessed May 2018).

Figure 5.8: International Migrants, Working Age Migrants, and Migrant Workers, 2013



Source: International Labour Organization (2015).

Like Oceania, both East Asia and Southeast Asia retain relatively high mobility within their subregions. Overall, intra-subregional migration declined slightly (except between Australia and New Zealand—50.6% in 2010 to 53.8% in 2017).

Cross-border labor demand drives the movement of people in Asia.

One key driver of the international migration is labor demand, as workers relocate to where they can find higher wages, better benefits, and greater career opportunities.²⁸ About 89.2% of international migrants globally are over the age of 15, with 72.7% of the migrants²⁹ entering labor markets in host countries (Figure 5.8).³⁰ Those proportions are likely higher in Asia as most migration is temporary worker migration to the Middle East and Southeast Asia. Permanent settlement or family reunification that includes nonworking international migrants is highly restricted in these areas.

Departure trends for temporary overseas employment vary among major source countries.

National statistics on annual worker movements give a better sense of the trends in cross-border labor mobility than international migrant stock data (Table 5.1).

Recent trends on the outward migration of workers vary substantially across countries. There have been large increases in Bangladesh, the Philippines, and Viet Nam; while India, Indonesia, Pakistan, Thailand, and Sri Lanka have seen the outflow of workers moderating or declining in recent years. One reason is that several countries actively discourage unskilled workers in vulnerable jobs like manual labor or domestic work.

Also, many source countries have seen sustained growth in job creation. But the rapid expansion in working age population in many of these countries continues to leave substantial workforce supply for overseas jobs. For example, the working age population in Bangladesh and the Philippines has grown more than 7.7% over the past 5 years.

Skilled Asian workers tend to migrate to advanced economies.

The Organisation for Economic Co-operation and Development countries remain the prime destination for skilled workers coming from Asia. The majority move to the US. Since 1997, applicants from Asia received the most H1B visas—a nonimmigrant US visa for professional workers with a bachelor's or master's degree for specified occupations (Figure 5.9). The share of H1B visas granted to applicants from Asia rose from 84.5% in 2013–2015 to at least 90.2% in 2017. The overwhelming majority come from India (about 79.9%) and the PRC (14.2%).

Recently, Japan—with a relatively tiny share of international migrants compared with other advanced economies—has been expanding the list of job categories open to foreign workers (Figure 5.10). Jobs include skilled and unskilled work in nursing and caregiving, household services, and construction. The number of migrant workers in Japan grew an average 13.5% from 2013 to 2017. International migrants granted special and technical skill visas were up by 79.8% (from

²⁸ Aside from the movement of workers, forced migration also drives the movement of people in the region. For example, the number of Rohingya refugees in Bangladesh rose fourfold between 2015 and 2017—from 231,958 to 932,216—based on United Nations High Commissioner for Refugees (UNHCR) statistics. The UNHCR defines refugees as individuals recognized under the 1951 Convention relating to the Status of Refugees, its 1967 Protocol, the 1969 Organization of African Unity Convention Governing the Specific Aspects of Refugee Problems in Africa, those recognized in accordance with the UNHCR Statute, individuals granted complementary forms of protection, or those enjoying temporary protection. Since 2007, the refugee population also includes people in a refugee-like situation.

²⁹ “Migrant worker” refers to “all international migrants who are currently employed or are unemployed and seeking employment in their present country of residence” (ILO 2015).

³⁰ See footnote 25 for the definition of international migrants and other factors driving migration.

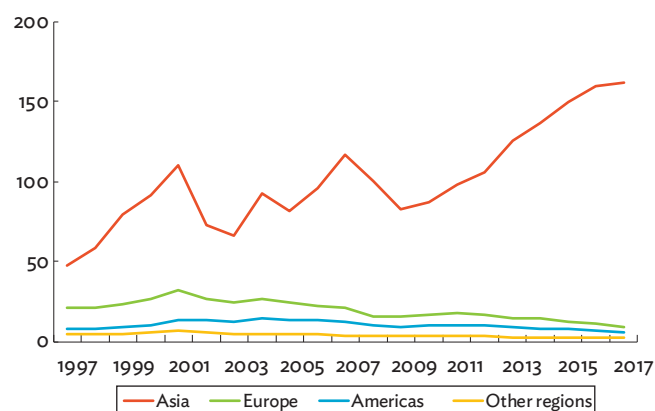
Table 5.1: Outflow of Overseas Workers—Selected Asian Countries (‘000, growth rate in parentheses)

Economy	2011	2012	2013	2014	2015	2016	2017
Bangladesh	568 (45%)	608 (7%)	409 (-33%)	426 (4%)	556 (31%)	758 (36%)	1,009 (33%)
India	637 (-1%)	746 (17%)	820 (10%)	805 (-2%)	784 (-3%)	521 (-34%)	391 (-25%)
Indonesia	587 (2%)	495 (-16%)	512 (3%)	430 (-16%)	276 (36%)	235 (15%)	262 (12%)
Nepal	355 (21%)	385 (8%)	451 (17%)	520 (15%)	499 (-4%)	404 (-19%)	383 (-5%)
Pakistan	457 (26%)	369 (-19%)	623 (69%)	752 (21%)	947 (26%)	839 (-11%)	466 (-45%)
Philippines	1,319 (17%)	1,435 (9%)	1,469 (2%)	1,431 (-3%)	1,438 (0.5%)	1,670 (16%)	-
Sri Lanka	263 (-2%)	282 (7%)	293 (4%)	301 (3%)	263 (-12%)	243 (-8%)	212 (-13%)
Tajikistan	-	-	-	671	553 (-18%)	517 (-6%)	488 (-6%)
Thailand	148 (3%)	134 (-9%)	131 (-2%)	120 (-8%)	117 (-3%)	114 (-3%)	-
Viet Nam	88 (2%)	80 (-9%)	88 (10%)	107 (22%)	116 (8%)	126 (9%)	135 (7%)

- = not available, ILO = International Labour Organization.

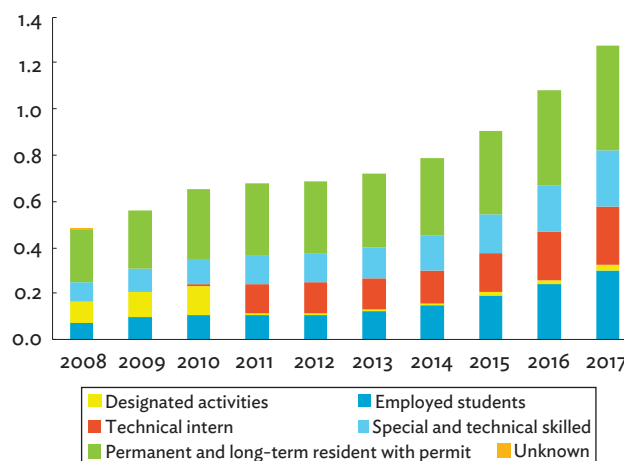
Note: Figures include skilled and unskilled workers requesting clearance for overseas employment from source countries, except India, which only records unskilled migrants.

Sources: Agency on Statistics Under the President of the Republic of Tajikistan. <https://www.stat.tj/tj/database-socio-demographic-sector> (accessed June 2018); Bangladesh Bank. <https://bb.org.bd> (accessed June 2018); Bureau of Manpower, Employment, and Training. bmet.org.bd (accessed June 2018); Government of Nepal, Ministry of Labour and Employment (2018); ILO. ILOSTAT. www.ilo.org/ilostat (accessed June 2018); Pakistan Bureau of Emigration and Overseas Employment. <https://beoe.gov.pk> (accessed June 2018); Philippine Overseas Employment Administration. www.poea.gov.ph; Sri Lanka Bureau of Foreign Employment (2016 and 2017); and Wadhawan (2018).

Figure 5.9: Number of United States H1B Visas Granted, by Region of Migrant Origin (‘000)

Notes: H1B is a nonimmigrant United States visa for professional workers with a bachelor's or master's degree for specified occupations. It is valid for 3 years and can be extended to a maximum 6 years. Americas include North America and Latin America and the Caribbean.

Source: United States Department of State, Bureau of Consular Affairs. Visa Statistics. <https://travel.state.gov/content/travel/en/legal/visa-law0/visa-statistics.html> (accessed July 2018).

Figure 5.10: Number of Foreign Workers in Japan, by Visa Type (million)

Source: Japan Ministry of Health, Labour, and Welfare. 2018. Status of Notification of "Employment Status of Foreigners" Summary (as of the end of October, Heisei 30). <https://www.mhlw.go.jp/file/04-Houdouhappyou-11655000-Shokugyouanteikyokuhakenyukiroudoutaisakubu-Gaikokujinkoyoutaisakuka/44789gr5.pdf>

132,571 to 238,412) over the same period. Migrants from Asia accounted for 69.2% of foreign workforce in 2017. The demand for foreign workers will rise due to Japan's aging population. The increase in the support ratio (share of seniors aged 65+ to working age population) is a major reason for the increase in foreign migrant stock from and to Asia (Box 5.1).

Policies in major host countries may be changing, reshaping the pattern of the movement of workers.

Many long-term projections suggest international migration to and from Asia will continue to increase, with many countries continuing to see a growing labor force and others increasing demand for migrant labor

Box 5.1: Demographic Changes and Migration

Using the United Nations' bilateral international migration matrix from 1990 to 2015, the determinants of international movement of people from developing Asia to 30 major host economies were examined.^a Essential demographic, economic, geographic, and other dyadic variables that push and pull the movement of international migrants from Asia were identified, consistent with existing migration literature (Kim and Cohen 2010, World Bank 2018, and Zaiceva and Zimmermann 2014).

Demographic variables in the empirical exercise included (i) working-age population of origin and destination economies, and (ii) the old-age dependency ratio of the destination economies. Economic variables are (iii) the per capita gross domestic product (GDP) of the origin economies, and (iv) the income gap between host and source economies. Geographic and other dyadic variables include (v) distances between capitals, (vi) contiguity, (vii) official languages, and (viii) colonial relationships.

Our ordinary least squares and fixed-effects estimates suggest that a unit increase in old-age dependency ratio at the host country on average is associated with a 5% increase in migrants in any given bilateral number of international migrants from developing Asia to major host economies. Also, the increase in income level of source country of migrants encourages migration, because it enables families to cover migration costs. Other economic and dyadic variables also contribute to migration. Outward migration from developing Asia most likely gains momentum as the region continues to see incomes rise, while many host countries undergo accelerating population aging.

Drivers of International Migration from Developing Asia

Dependent variable: Log(Bilateral International Migrant Stock)

	OLS	FE
Demographic factors		
Working-age population of origin economies	0.189 (0.304)	0.142 (0.156)
Working-age population of host economies	1.010*** (0.162)	0.887*** (0.076)
Old-age dependency ratio of host economies	0.050*** (0.008)	0.051*** (0.005)
Economic factors		
GDP per capita of origin economies	0.408* (0.225)	0.256*** (0.093)
Income gap relative to host economies	0.416** (0.170)	0.150** (0.067)
Geographic and other dyadic variables		
	Yes	No
Constant	-0.141 (5.337)	-11.209*** (3.277)
Number of observations	2,153	2,153
R-squared	0.656	0.502
Number of bilateral routes	–	413

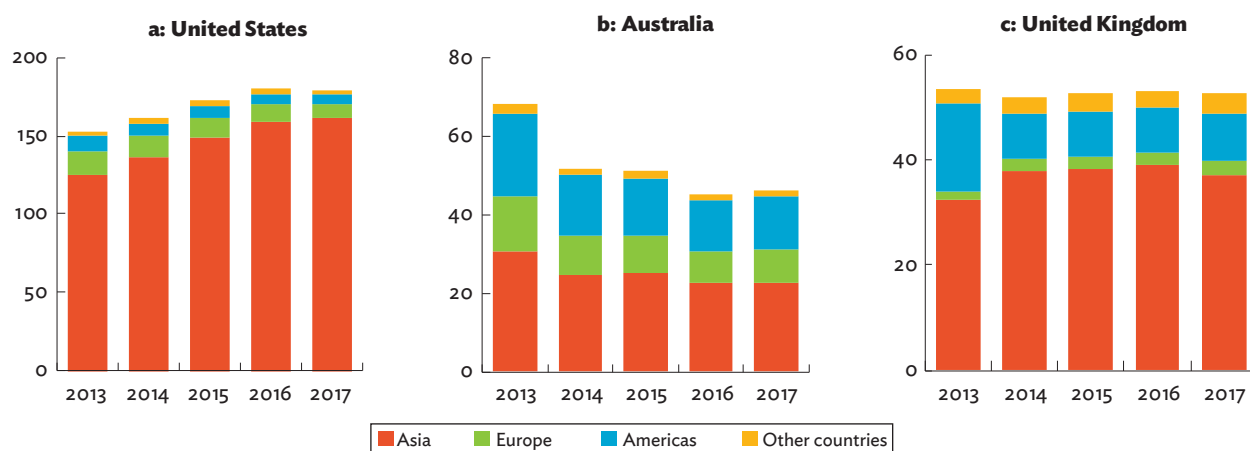
*** = significant at 1%, ** = significant at 5%, * = significant at 10%. Robust standard errors in parentheses.

– = not applicable, FE = fixed effects, GDP = gross domestic product, OLS = ordinary least squares.

Sources: Authors' calculations using data from Institute for Research on the International Economy. <http://www.cepii.fr/CEPII/en/cepil/cepil.asp> (accessed May 2018); United Nations, Department of Economic and Social Affairs, Population Division (2017); United Nations, Department of Economic and Social Affairs, Population Division. International Migrant Stock: The 2017 Revision. <http://www.un.org/en/development/desa/population/migration/data/estimates2/estimates17.shtml> (accessed May 2018); and World Bank. World Development Indicators. <https://data.worldbank.org/> (accessed May 2018).

^a The 30 host economies are Armenia; Australia; Bahrain; Canada; France; Germany; Greece; Hong Kong, China; Israel; Italy; Japan; Kuwait; Malaysia; Nepal; the Netherlands; New Zealand; Oman; the People's Republic of China; Qatar; the Republic of Korea; the Russian Federation; Saudi Arabia; Singapore; Spain; Sweden; Thailand; Ukraine; United Arab Emirates; the United Kingdom; and the United States.

Source: Kikkawa and Park (forthcoming).

Figure 5.11: Temporary Skilled Migrant Visas Approved, by Source Region ('000)

Note: Americas include North America and Latin America and the Caribbean.

Sources: United States Department of State, Bureau of Consular Affairs. Visa Statistics. <https://travel.state.gov/content/travel/en/legal/visa-law0/visa-statistics.html>; Australian Government, Department of Immigration and Border Protection. Work in Australia—Statistics. <https://www.homeaffairs.gov.au/about/reports-publications/research-statistics/statistics/work-in-australia>; and United Kingdom Immigration Statistics. <https://www.gov.uk/government/publications/immigration-statistics-year-ending-march-2018/list-of-tables> (all accessed July 2018).

(Walmsley, Aguilar, and Ahmed 2017). However, policy uncertainties in some major host countries may impact these assessments. The US, for example, has vowed to tighten and reform existing immigration and temporary migration schemes. In February, the US Citizenship Immigration Services agency released a policy memorandum requiring more information about grantees of H1B visas, to ensure that skill shortages truly exist (O'Brien 2018). US approvals in 2017 fell slightly (Figure 5.11a).

Australia is another major host country for migrants from the region. Close to half of skilled workers granted temporary visas come from Asia (Figure 5.11b)—the top three source countries are India, the Philippines, and the PRC.³¹ In April 2018, the short-term work visa for skilled workers (457 visa) was abolished, replaced by a temporary skill shortage (TSS) visa—which has a 2-year cap on skilled workers that qualify under its short-term skilled occupation list (Australian Government, Department of Immigration and Border Protection). The number of visa approvals has dropped substantially over the past few years.

The United Kingdom's (UK) "Brexit" from the European Union (EU)—scheduled for March 2019—has

reportedly resulted in an exodus of EU professionals from the country. While its intake of skilled migrants from Asia declined 4.9%, the overall drop was 1.4% from 2016 to 2017 (Figure 5.11c).

While some countries have reservations against increasing migrant arrivals, Canada—with its Express Entry program—has been taking advantage of the delays in issuance of green cards in the US. In 2017, it attracted 86,022 top-ranked or highly skilled migrant candidates, more than double 33,782 in 2016 (Kably 2018). The aging workforce in East Asia has also led to a rise in the migrant population. The interplay among immigration policies worldwide may lead to a directional shift in skilled migration flows in the coming years.

Overall, long-term trends show skilled workers from Asia will continue to migrate to developed economies in North America, Europe, and East Asia. Amid policy changes to enhance control over immigration and border issues, creating and implementing labor mobility frameworks and human capital development mechanisms are increasingly important—and are regarded as promising forms of regional cooperation in Asia. In particular, cross-border occupational skill mobility remains limited, with recognition mostly relying

³¹ Data are specific to visa subclass 457 primary applicants of the Tier 1 category and intra-company transfers and sportspersons in the Tier 2 category. Primary applicants are defined by the Australian government as people who must satisfy primary criteria under Migration Regulations (Australian Government, Department of Immigration and Border Protection. Work in Australia—Statistics. <https://www.homeaffairs.gov.au/about/reports-publications/research-statistics/statistics/work-in-australia> [accessed July 2018]).

on host country schemes—except for skills standardized through international or regional agreements. For example, multilateral mutual recognition agreements such as the ASEAN's eight pilot agreements hold much potential to increase skilled labor mobility across borders.

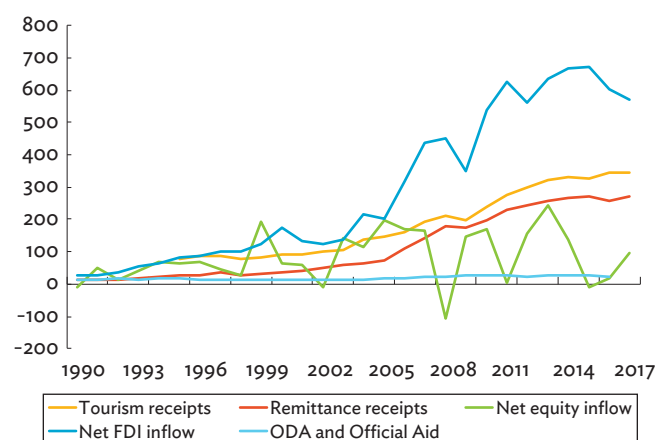
Remittances

Remittances to Asia are growing once again.

After a slight drop in 2016, a record \$272.5 billion in remittances were channeled to Asia in 2017, up 6.3% (Figure 5.12).³² Remittances globally increased by some \$39.9 billion to \$613.5 billion.

Remittances are an important and stable source of financial inflow to many developing economies in Asia. They are an important source of foreign exchange, especially for economies with limited natural resources. As direct transfers, remittances from overseas workers boost beneficiaries' consumption and savings. And as person-to-person flows, they can better target

Figure 5.12: Financial Flows to Asia, by Type (\$ billion)



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

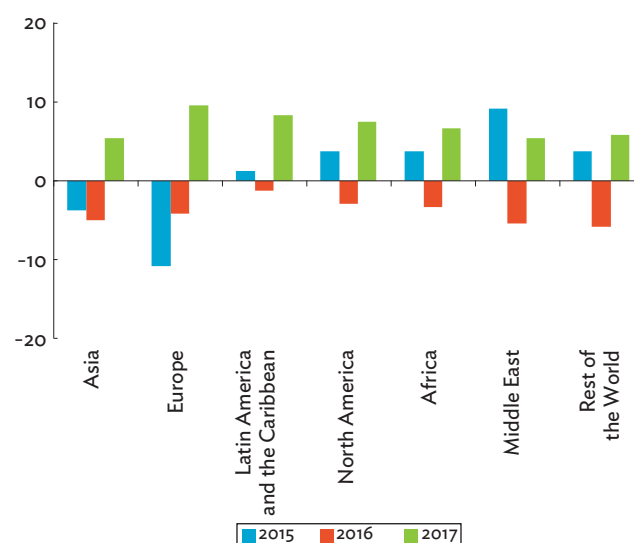
Sources: ADB calculations using data from World Bank. World Development Indicators. <https://data.worldbank.org/> (accessed September 2018); and Global Knowledge Partnership on Migration and Development (KNOMAD). <http://www.knomad.org/data/remittances> (accessed May 2018).

recipient household needs, raising living standards and family welfare.

Remittances to Asia rose from all regions worldwide.

Remittance inflows increased from all global sources (after falling in 2016) with intraregional transfers growing by \$3.7 billion (5.29%) to \$75.4 billion (Figure 5.13). Inflows from the Middle East increased \$4.2 billion (up 5.2%) from the \$80.0 billion remitted in 2016. Remittances from North America reached \$69.1 billion (up 7.1%). Inflows from Europe rose to \$38.3 billion (up 9.4%).

Figure 5.13: Remittance Inflows to Asia, by Source (% change, year-on-year)

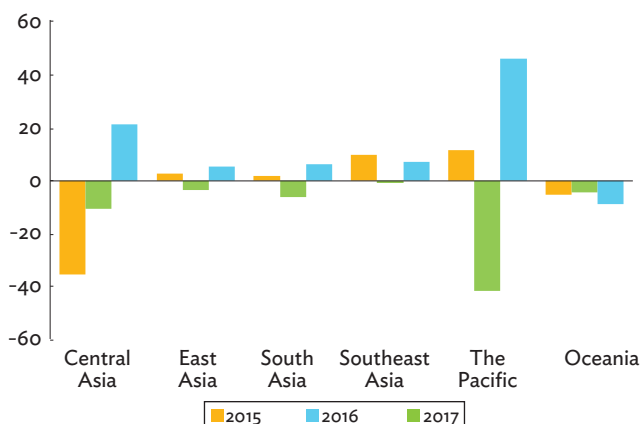


Source: ADB calculations using data from Global Knowledge Partnership on Migration and Development (KNOMAD). <http://www.knomad.org/data/remittances> (accessed May 2018).

Similarly, remittance flows to all subregions grew in 2017, except for Oceania (Figure 5.14). Remittances to the Pacific grew by 45.6% to \$580.4 million, continuing a volatile trend of alternately increasing then decreasing, often dramatically—there were rapid increases to Samoa (up by 272.8%), Tonga (81.9%), and Fiji (6.6%). Remittances to Southeast Asia,

³² 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.

Figure 5.14: Remittance Inflows to Asia Subregions
(% change, year-on-year)



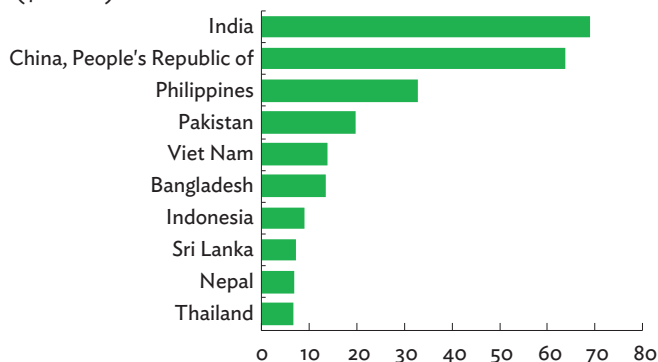
Source: ADB calculations using data from Global Knowledge Partnership on Migration and Development (KNOMAD). <http://www.knomad.org/data/remittances> (accessed May 2018).

South Asia, and East Asia also recovered, climbing 5.8% to \$257.3 billion in total. In Oceania, remittance inflows declined for a fourth consecutive year—down \$110.3 million in Australia and \$122.7 million in New Zealand. Remittances to Australia were only 78.7% of its peak 2013 level, while those to New Zealand fell for a third consecutive year, but by a much higher 29.2%. The currencies of both countries fluctuated against those of the US and the UK—two major host countries of migrants from Oceania.³³ The high cost of remittance services in the subregion and impact of de-risking on Oceania-based correspondent banks and formal money transfer channels may have driven remitters to use available informal back channels instead.³⁴

Remittances are a key income source for several countries.

South Asia, East Asia, and Southeast Asia are the major remittance recipients in Asia. They received, on average, 94.5% of the region's total remittance inflows in 2017—and 91.1% since 2010. In 2017, the top three remittance recipients—India, the PRC, and the Philippines—accounted for roughly 60.8% (\$165.6 billion) of all remittances to Asia and 21.7% of remittances globally (\$613.5 billion) (Figure 5.15).

Figure 5.15: Top 10 Remittance Recipients in Asia
(\$ billion)



Source: ADB calculations using data from Global Knowledge Partnership on Migration and Development (KNOMAD). <http://www.knomad.org/data/remittances> (accessed May 2018).

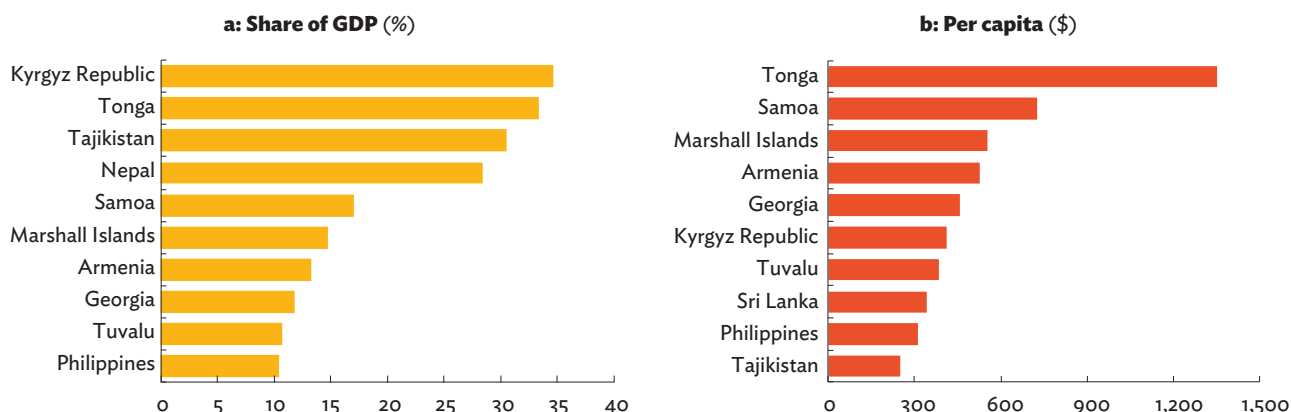
Some countries receiving smaller amounts nonetheless depend more on remittances as an income source. For example, remittance inflows are equivalent to some 33.0% of gross domestic product (GDP) in the Kyrgyz Republic, Tonga, and Tajikistan. Remittances to some South Asian countries are also significant components of national income. Nepal's remittances equal 28.4% of GDP in 2017 (Figure 5.16a). Bangladesh, Pakistan, and Sri Lanka relied on remittances for at least proportional to an annual average of 5.0% of GDP since 2010; this has been the trend for these South Asian economies. In Southeast Asia, remittance inflow to the Philippines was equivalent to 10.5% of GDP; in Viet Nam, it was 6.3%. In per capita terms, remittances to Tonga, the Marshall Islands, and Armenia are significant (Figure 5.16b). In the Pacific, remittances not only contribute to output and growth (Brown and Mineshima 2007), but also promote financial development.

The Middle East remains the top source for remittances to Asia.

Around 30.9% of remittances in 2017 came from the Middle East (\$84.2 billion), while 27.7% was sourced intraregionally (Figure 5.17). Remittance patterns are fairly proportional to their share of migrants, though they are larger for the Middle East and North America (Figure 5.18). A large proportion of Middle East-bound

³³ In 2017, the Australian dollar depreciated 7.8% against the US dollar and appreciated 1.7% against the pound sterling, while the New Zealand dollar depreciated 2.9% against the US dollar and appreciated 6.4% against the British pound.

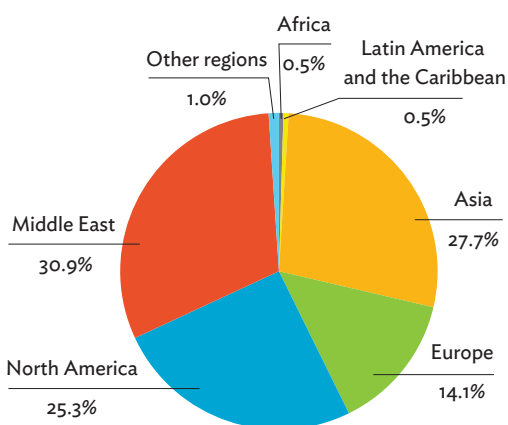
³⁴ International Finance Corporation (2017) found that as de-risking reduces correspondent banking relationships, it also has a negative effect on money transfer organizations. Fluctuation in the remittance inflow may also be due to change in how remittances are measured (Clemens and McKenzie 2018).

Figure 5.16: Top 10 Remittance-Recipient Economies in Asia, 2017

GDP = gross domestic product.

Note: Some countries which recorded substantial remittance inflow (as share of GDP and in per capita terms) in the past years have not made 2017 figures available at the time of publication.

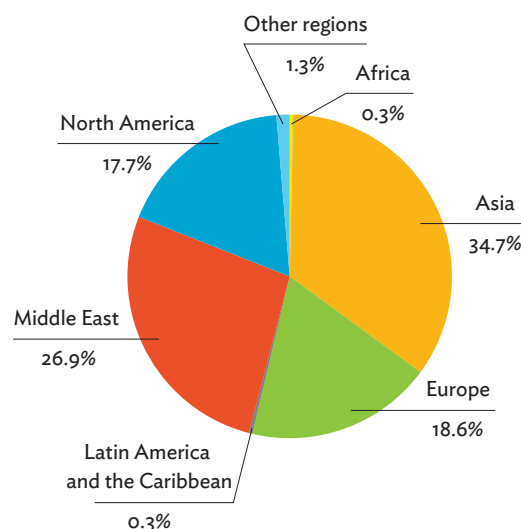
Source: ADB calculations using data from Global Knowledge Partnership on Migration and Development (KNOMAD). <http://www.knomad.org/data/remittances> (accessed May 2018).

Figure 5.17: Remittance Inflows to Asia, by Source, 2017 (% share)

Source: ADB calculations using data from Global Knowledge Partnership on Migration and Development (KNOMAD). <http://www.knomad.org/data/remittances> (accessed May 2018).

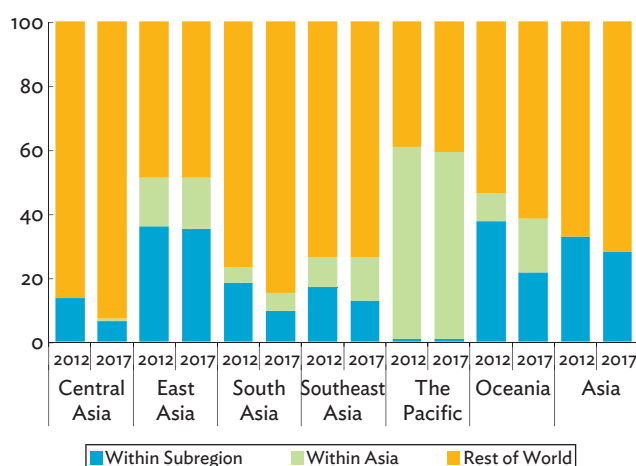
migrants are temporary workers who send most of their earnings back to their immediate families. The relatively larger remittances from North America mirror the large share of skilled migrants earning higher wages, even if they send money to non-immediate family members.

Subregional data show 17.3% of remittances were intra-subregional (Figure 5.19). In the Pacific, Asia was the source of 59.3% of inward remittances. Intra-subregional remittances declined from 2012 to 2017

Figure 5.18: Migration from Asia, by Host Region, 2017 (% share)

Source: ADB calculations using data from United Nations, Department of Economic and Social Affairs, Population Division. International Migrant Stock: The 2017 Revision. <http://www.un.org/en/development/desa/population/migration/data/estimates2/estimates17.shtml> (accessed May 2018).

across all subregions, except for the Pacific. For Central Asia, remittances from outside Asia increased by 28.3%, with most from the Russian Federation. Oceania nearly doubled its remittance shares from within Asia, from 8.6% in 2012 to 17.2% in 2017, while Southeast Asia increased its intraregional remittances by 4.1% over the period.

Figure 5.19: Subregional Remittance Sources in Asia (%)

Notes:

- (i) Within Subregion refers to remittances within subregion *i* as a percentage of remittances from the world to subregion *i*.
- (ii) Within Asia refers to the remittances from other Asian subregions to subregion *i* as a percentage of remittances from the world to subregion *i*.
- (iii) Rest of the World refers to the remittances from non-Asian economies to subregion *i* as a percentage of remittances from the world to subregion *i*.

Source: ADB calculations using data from Global Knowledge Partnership on Migration and Development (KNOMAD). <http://www.knomad.org/data/remittances> (accessed May 2018).

Remittances are projected to grow given the steady economic growth outlook for most host countries.

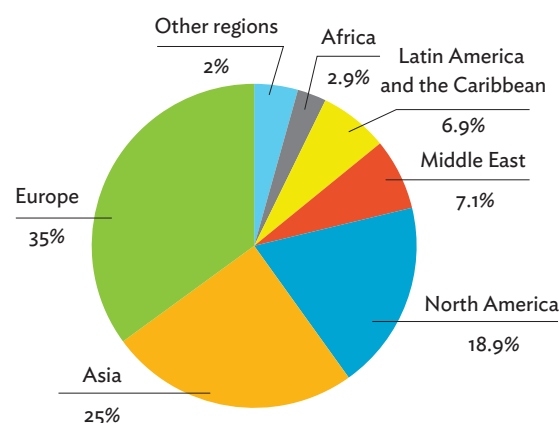
The Global Knowledge Partnership on Migration and Development (2018) estimates global remittances in 2018 will grow by 4.6%, reaching \$641.2 billion. Inflows to Asia should expand by 3.8% to \$282.9 billion. However, increasingly restrictive immigration policies in some major host countries pose short- to medium-term downside risks. Nonetheless, demographic changes are expected to drive further migration from countries with growing working-age populations to countries with rapidly aging populations, creating new sources of remittance inflows in the long term.

International Tourism Receipts and the Movement of Tourists

International tourism receipts in Asia grew by 5.3% to a record high \$346.0 billion in 2016. Tourism is a main source of income for many Pacific DMCs and Southeast Asian countries.

Global tourism continues to expand and is a key driver of economic development for many countries in the region. International tourism receipts to Asia reached \$346.0 billion in 2016, about 24.8% of the global total (Figure 5.20).³⁵ The two subregions with the largest share of the region's tourism dollars were East Asia (39.7%) and Southeast Asia (35.5%) (Table 5.2). They also accounted for the largest shares of international arrivals. South Asia's tourism receipts continue to rise—tourism receipts increased to \$32.3 billion (9.3% of total Asia) in 2016, well above the \$5.1 billion (5.7%) in 2000.

By value, Thailand; the PRC; and Hong Kong, China are among the top recipients (Figure 5.21a). Thailand's

Figure 5.20: International Tourism Receipts, by Major Region, 2016

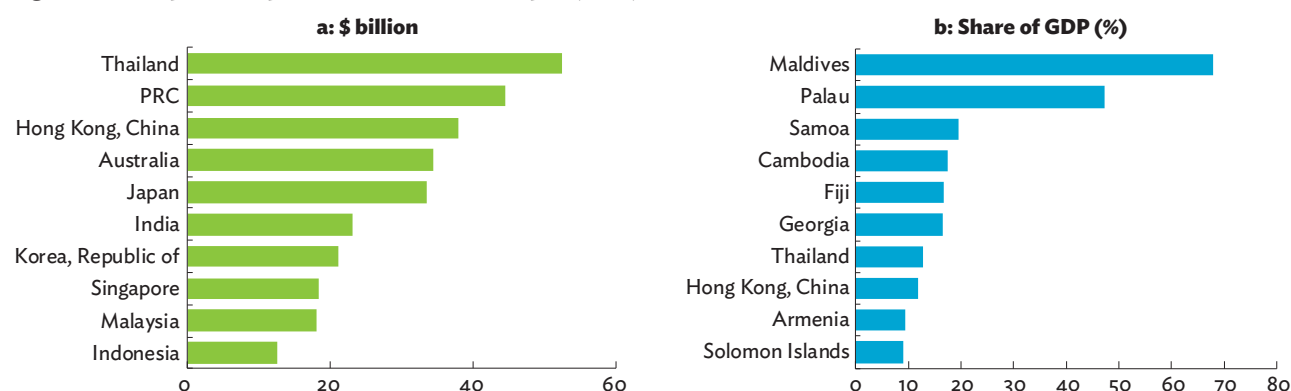
Sources: ADB calculations using data from World Bank. World Development Indicators. <https://data.worldbank.org/> (accessed September 2018); and United Nations World Tourism Organization (2018b).

³⁵ The United Nations World Tourism Organization defines international tourism receipts as “expenditures by international inbound visitors, including payments to national carriers for international transport, which may include any other prepayment made for goods or services received in the destination country. They also may include receipts from same-day visitors, except when these are important enough to justify separate classification.”

Table 5.2: Tourism Arrivals and Receipts in Asia in 2016, by Subregion

Subregion	International Tourism Receipts (\$ million)	Share of Total Tourism Receipts to Asia (%)	International Arrivals (million)	Share of International Tourist Arrivals to Asia (%)
Central Asia	8,556	2.5	19.3	5.1
East Asia	137,267	39.7	220.0	58.1
Oceania	43,893	12.7	11.6	3.1
South Asia	32,306	9.3	12.9	3.4
Southeast Asia	122,766	35.5	113.1	29.9
The Pacific	1,210	0.3	1.6	0.4
Total	345,998	100.0	378.5	100.0

Source: ADB calculations using data from World Bank. World Development Indicators. <https://data.worldbank.org/> (accessed September 2018); and United Nations World Tourism Organization. Tourism Satellite Accounts. <http://statistics.unwto.org> (accessed August 2018).

Figure 5.21: Top 10 Recipients of Tourism Receipts (2016)

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

Note: Some economies which recorded substantial tourist receipts (as share of GDP and in per capita terms) in the past years have not made 2016 figures available at the time of publication.

Source: ADB calculations using data from World Bank. World Development Indicators. <https://data.worldbank.org/> (accessed September 2018); and United Nations World Tourism Organization (2018b).

“Amazing Thailand” and “Discover Thainess” tourism promotion campaigns successfully attracted new tourists during 2011–2016—with receipts growing at annual average rates of 14.8%. Singapore, which is placed 8th, ranked as the most globally competitive travel and tourism destination among Asian economies (World Economic Forum 2017)—earning \$18.4 billion in 2016, up by 11.0% from 2015.³⁶ Tourism receipts are an essential source of income for several Pacific DMCs and Southeast Asian countries. Maldives tops the list with 68.0% of its GDP derived from tourism followed by Palau (47.3 %) (Figure 5.21b). Samoa earned 19.5% of GDP from tourism and Fiji 16.7%. Cambodia’s tourism income was 17.5% of GDP in 2016 and Thailand 12.7%.

The number of international visitors traveling to Asia grew by 9.3% in 2016 to 378.5 million as intraregional tourism continues to expand; but a growing share of Asian tourists is heading to non-Asian destinations.

In 2016, there were 1.2 billion international tourists worldwide, up by 3.7 % from 2015. Arrivals to Asia reached 378.5 million, up by 9.3% over 2015 and well above world year-on-year growth. The share of global arrivals to Asia has grown from 25.6% in 2006 to 30.6% in 2016.

³⁶ According to the World Economic Forum’s Travel and Tourism Competitiveness Report 2017, Singapore ranked 13th among 136 countries, keeping its ranking steady from 11th among 141 countries in 2015. Among the ASEAN economies, it ranked highest.

The growth of intraregional tourism has fueled the increase. Between 2012 and 2016, the number of intraregional Asian tourists grew from 235.0 million to 295.3 million (Figure 5.22). The brisk growth in Asia-bound travel underscores the preference of Asian tourists to travel within the region, thus providing fertile ground for greater regional cooperation in tourism—such as the visa policy harmonization initiative of the Association of Southeast Asian Nations (ASEAN) (Box 5.2). Also, over the past 5 years, Asians traveling outside the region increased by 18.6% (16.1 million) to 102.3 million.

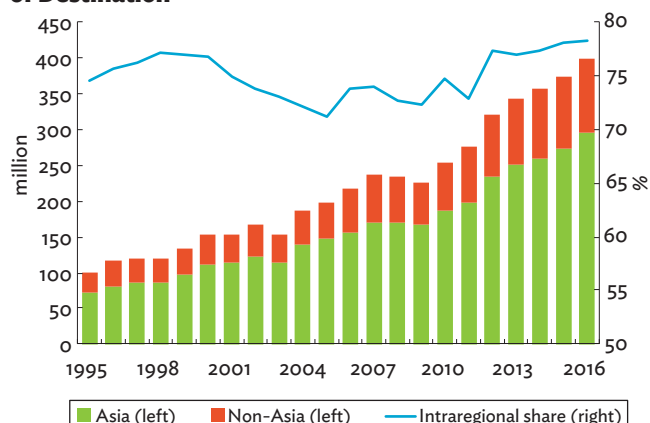
The declining share of intraregional travel is a phenomenon not unique to Asia. In Europe, nearly 90.0% of tourists used to travel within the region, but the share has declined over the past decade to about 83.8% in 2016 (Figure 5.23). Demand for long-haul travel likely increased as tourist markets developed and destination choices diversified.

By destination, in 2000, the most popular for Asian tourists were the PRC (44.7%); Hong Kong, China (4.3%); Thailand (4.3%); Singapore (3.8%); and the Republic of Korea (2.6%) (Table 5.3). The US (3.8%) and the Russian Federation (4.2%) were the only two non-Asian countries among the top 10 destinations. In 2016, the PRC remained the most-visited intraregionally, drawing 108.2 million visitors. Southeast Asia's drive to attract tourists was evident, as Malaysia and Thailand were second and third most favorite destinations, with a total of 48.6 million visitors. Saudi Arabia was among the top five extraregional destinations in both years, largely due to increased flows of Haj pilgrims.

Between 2000 and 2016, the relative shares of the region's visitors to the Middle East and Latin America and the Caribbean doubled, while the share of other regions increased slightly (Figure 5.24). The shares of Europe and North America declined as the intraregional share of Asia rose marginally.

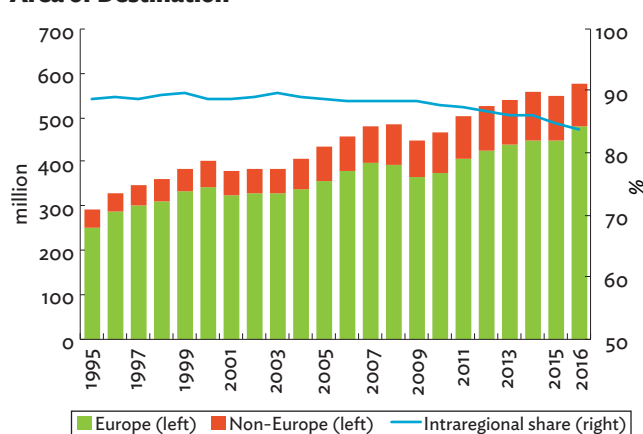
A positive outlook for global economic growth is good for the industry. Outbound tourism is expected to increase further with Asia's expanding middle-income households. The PRC will continue to be targeted as a source for tourists. In 2017, they spent \$258.0 billion traveling, nearly twice the tourist expenditures from the US (\$37.0 billion) and 37.2% above the combined outbound tourism spending of Germany (\$84.0 billion),

Figure 5.22: Number of Asian Tourists, by Major Area of Destination



UNWTO = United Nations World Tourism Organization.
Note: 2016 data were calculated using arrivals information from UNWTO Tourism Satellite Accounts.
Source: ADB calculations using data from UNWTO. Tourism Satellite Accounts. <http://statistics.unwto.org/> (accessed August 2018).

Figure 5.23: Number of European Tourists, by Major Area of Destination



UNWTO = United Nations World Tourism Organization.
Note: 2016 data were calculated using arrivals information from UNWTO Tourism Satellite Accounts.
Source: ADB calculations using data from United Nations World Tourism Organization. Tourism Satellite Accounts. <http://statistics.unwto.org/> (accessed August 2018).

the UK (\$63.0 billion), and France (\$41.0 billion) (UNWTO 2018a). Spending of tourists from the Republic of Korea rose by 9.0% in 2017 from 2016, while Australian spending increased 7.0%.

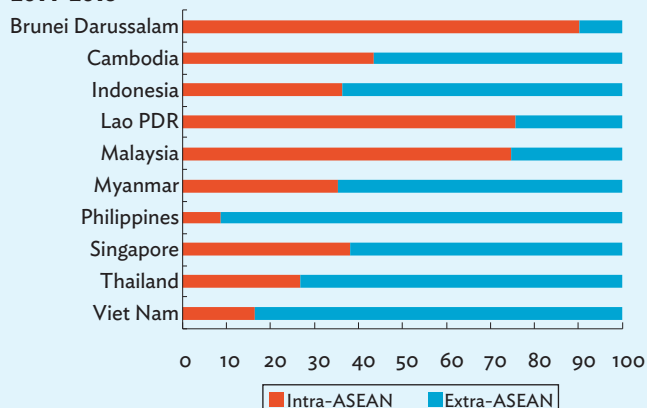
A growing number of tourists from the region are choosing destinations outside Asia, with Asian's demand for air travel getting a lot of push from the momentum created by the low-cost, low-price model of the budget airlines industry. For example, European travel routes are

Box 5.2: Promoting ASEAN as a Single Tourism Destination—the Unified Visa Policy Scheme

Since the Association of Southeast Asian Nations (ASEAN) Tourism Agreement was signed at the 2001 Brunei Darussalam Summit, the group has worked to promote easy, efficient, and competitive travel across ASEAN.^a In 2006, the ASEAN Framework Agreement on Visa Exemption was signed, allowing ASEAN nationals visa-free travel to member countries (ASEAN Secretariat 2006). Its impact was rapid—the 11.6 million intra-ASEAN tourists in 2006 increased to 17.3 million in 2010 and doubled to 35.8 million by 2016. ASEAN tourism also has a strong intra-ASEAN component—on average, 43.0% of visitors to ASEAN in 2014–2016 were from other ASEAN countries. However, foreign tourist visa requirements remain restricted to varying degrees.^b Visa policy is the most essential government policy affecting international tourism and reforms aimed at developing visa standards and procedures generate a policy effect which is closely linked to tourism development. The policy effect comes in the form of increased tourist arrivals—leading to increased tourism receipts and job creation. A study by the World Travel and Tourism Council (2014) estimates that, in the case of ASEAN, the policy effect will lead to an additional 6.0 million–10.0 million international arrivals and additional tourism receipts of around \$7.0 billion–\$10.0 billion. With arrivals targeted at 123 million by 2020 and 152 million by 2025, ASEAN aims to brand itself as a culturally diverse, cost-competitive 10-country single destination.^c Thus, officials are working toward creating a unified ASEAN tourism visa—as envisaged in the ASEAN Tourism Strategic Plan (ATSP) 2011–2015 and ATSP 2016–2025—whereby a visa issued to a foreign national in one ASEAN member allows travel across all 10 ASEAN countries (ASEAN Secretariat 2015).

In 2016, Southeast Asia ranked highest in visa openness score by region (Glaesser 2016). ASEAN as a whole has a considerable pull on foreign tourists. But the degree to which each country attracts extra-ASEAN visitors varies

Annual Average International Tourism Arrivals in ASEAN, 2014–2016



ASEAN = Association of Southeast Asian Nations, Lao PDR = Lao People's Democratic Republic.

Source: ADB calculations using data from ASEAN Secretariat. ASEANstats Data Portal. <https://data.aseanstats.org/> (accessed June 2018).

substantially. Brunei Darussalam, the Lao People's Democratic Republic (Lao PDR), and Malaysia attract more intra-ASEAN visitors, while 80% of the visitors to the Philippines and Viet Nam come from outside the subregion (box figure).^d

Currently, the visa requirements for individual ASEAN countries vary significantly—which is why creating a unified ASEAN visa scheme is challenging (box table). Laws differ, while some members are more open to international tourism than others. Indonesia and the Philippines are the two strongest supporters of the single visa scheme (Remo 2014)—both are archipelagos and geographically apart from ASEAN's land borders. They are also more dependent on foreign tourism. Between 2014 and 2016, an average 63.8% of tourists to Indonesia came from outside ASEAN, while in the Philippines it reached 91.3%. To build greater

Continued on next page

^a ASEAN cooperation in tourism was formalized in 1976 following the formation of the Sub-Committee on Tourism under the ASEAN Committee on Trade and Tourism (ASEAN Secretariat 2012).

^b "Foreign tourist" or "extra-ASEAN tourist" refers to a tourist who is not an ASEAN national.

^c Estimates by World Travel and Tourism Council.

^d Philippine immigration bureau estimates indicate that *balikbayans*—Filipinos who have become citizens of other countries—comprised at least 20% of tourist flows in 2013 and 2014. This may also apply to countries with large migrant or diaspora populations abroad.

Box 2.2 continued**Visa Requirements in ASEAN Economies**

Economy	Visa Requirements for Tourists from Non-ASEAN Asia, 2016 (number of economies)				
	VF	VOA	EV	SP	VR
Brunei Darussalam	13	12	3	4	9
Cambodia	2	8	4	4	23
Indonesia	7	9	3	1	19
Lao PDR	2	6	4	1	22
Malaysia	14	13	3	4	7
Myanmar	1	6	2	1	24
Philippines	6	10	4	3	17
Singapore	15	14	2	4	6
Thailand	10	10	3	3	14
Viet Nam	2	7	4	1	21

ASEAN = Association of Southeast Asian Nations, EV = e-visa, Lao PDR = Lao People's Democratic Republic, SP = special permit, VF = visa free, VOA = visa on arrival, VR = visa required.

Source: ADB calculations using data from national sources.

openness, Indonesia now allows visa-free entry for 30 days to citizens from 169 countries, while in the Philippines, 157 economies are allowed visa-free stays up to 30 days. Viet Nam—also visited more by non-ASEAN tourists—grants visa-free entry to only two non-ASEAN Asian countries and requires visas from at least 21 Asian nations outside

ASEAN. Given reciprocity in granting or requiring visas, Viet Nam nationals also face visa restrictions from more nations globally compared with its more visa-open ASEAN neighbors—175 nations require a visa from Viet Nam nationals compared with only 38 for Malaysians and 46 for Singaporeans.

While the unified visa scheme for ASEAN remains a challenge, cooperation between some ASEAN members to adopt mechanisms for a common tourist visa is moving forward. One is the Ayeyawady–Chao Phraya–Mekong Economic Cooperation Strategy (ACMECS), a joint development initiative between Cambodia, the Lao PDR, Myanmar, Thailand, and Viet Nam. Thus far, an ACMECS Single Visa is available for Cambodia or Thailand—tourists from 35 non-ASEAN countries can apply for a single visa at either embassy valid for visits to both countries.^e

Another example is the Mekong Tourism Coordinating Office—established with funding from the governments of Cambodia, the Lao PDR, Myanmar, the PRC, Thailand, and Viet Nam—which aims to “develop and promote the Mekong Region as a single tourism destination” (Mekong Tourism Coordination Office 2017). Although the GMS Tourism Sector Strategy 2016–2025 includes exploring the feasibility of a single GMS tourist visa, it is currently focusing on expanding visa-on-arrival eligibility and making electronic visas more available.

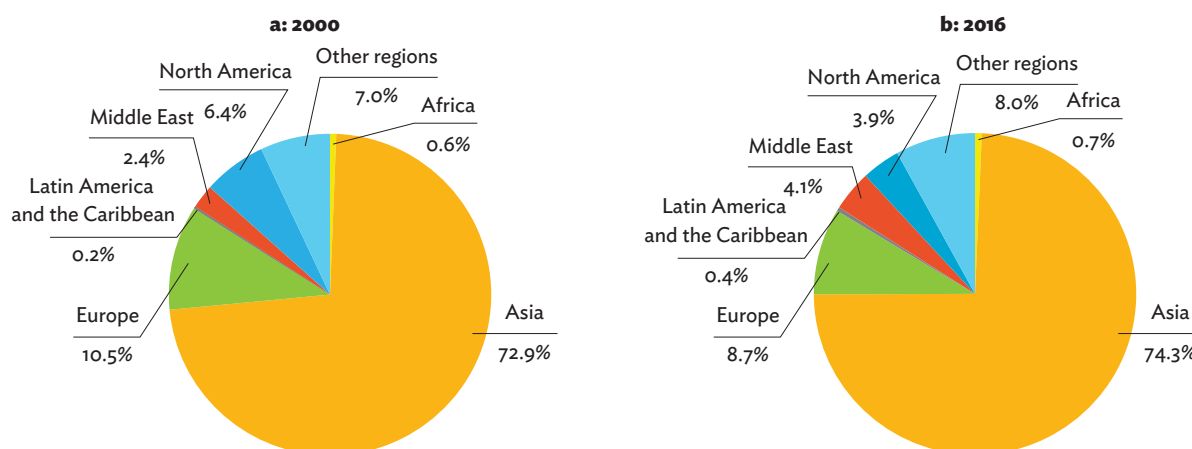
^e The 35 economies include Australia; Austria; Bahrain; Belgium; Canada; Denmark; Finland; France; Germany; Greece; Hong Kong, China; Iceland; India; Ireland; Israel; Italy; Japan; Luxembourg; the Netherlands; New Zealand; Norway; Oman; Portugal; the People's Republic of China; Qatar; the Republic of Korea; South Africa; Spain; Sweden; Switzerland; Turkey; United Arab Emirates; the United Kingdom; and the United States (ACMECS. <http://www.mfa.go.th/acmecs/> [accessed June 2018]).

Source: ADB staff.

Table 5.3: Top Destinations of Tourists from Asia

a: 2016		b: 2000	
Economies	Number in million (share of total in parentheses)	Economies	Number in million (share of total in parentheses)
Within Asia		Within Asia	
China, People's Republic of	108.2 (27.2%)	China, People's Republic of	68.4 (44.7%)
Malaysia	24.6 (6.2%)	Hong Kong, China	6.5 (4.3%)
Thailand	24.0 (6.0%)	Thailand	6.5 (4.3%)
Hong Kong, China	23.1 (5.8%)	Singapore	5.8 (3.8%)
Japan	20.8 (5.2%)	Korea, Republic of	4.0 (2.6%)
Outside Asia		Outside Asia	
Macau, China	29.9 (7.5%)	Macau, China	9.0 (5.9%)
United States	13.1 (3.3%)	United States	8.3 (3.8%)
Russian Federation	8.9 (2.2%)	Russian Federation	6.4 (4.2%)
Saudi Arabia	5.9 (1.5%)	United Kingdom	2.4 (1.6%)
Turkey	4.3 (1.1%)	Saudi Arabia	1.7 (1.1%)

Sources: ADB calculations using data from United Nations World Tourism Organization (UNWTO). Tourism Satellite Accounts. <http://statistics.unwto.org/> (accessed June 2018); and UNWTO (2018b).

Figure 5.24: Regional Destination of Tourists from Asia

Sources: ADB calculations using data from United Nations World Tourism Organization (UNWTO). Tourism Satellite Accounts. <http://statistics.unwto.org/> (accessed June 2018); and UNWTO (2018b).

a growing travel option for PRC tourists—between 2010 and 2015, the number of Europe-bound PRC tourists tripled, with annual growth averaging at least 21.3%. To bolster competitiveness, Asian economies should continue cultivating tourism attractions and diversifying new tourism products to cater to different tourist preferences and offer longer stays within the region. Improving infrastructure to reduce travel time and costs, reducing and harmonizing cross-border formalities, developing human capital for tourism, better engaging private sector businesses and tourism entrepreneurs,

and making natural attractions and heritage assets less vulnerable to human-made and climate-caused damage will strengthen the industry and make the region's tourism more relevant and responsive to inclusive, green, and knowledge-based development. For example, current initiatives in the ASEAN Tourism Strategic Plan 2016–2025, the APEC's Tourism Strategic Plan 2015–2019, and the Greater Mekong Subregion Tourism program should be promoted.

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